

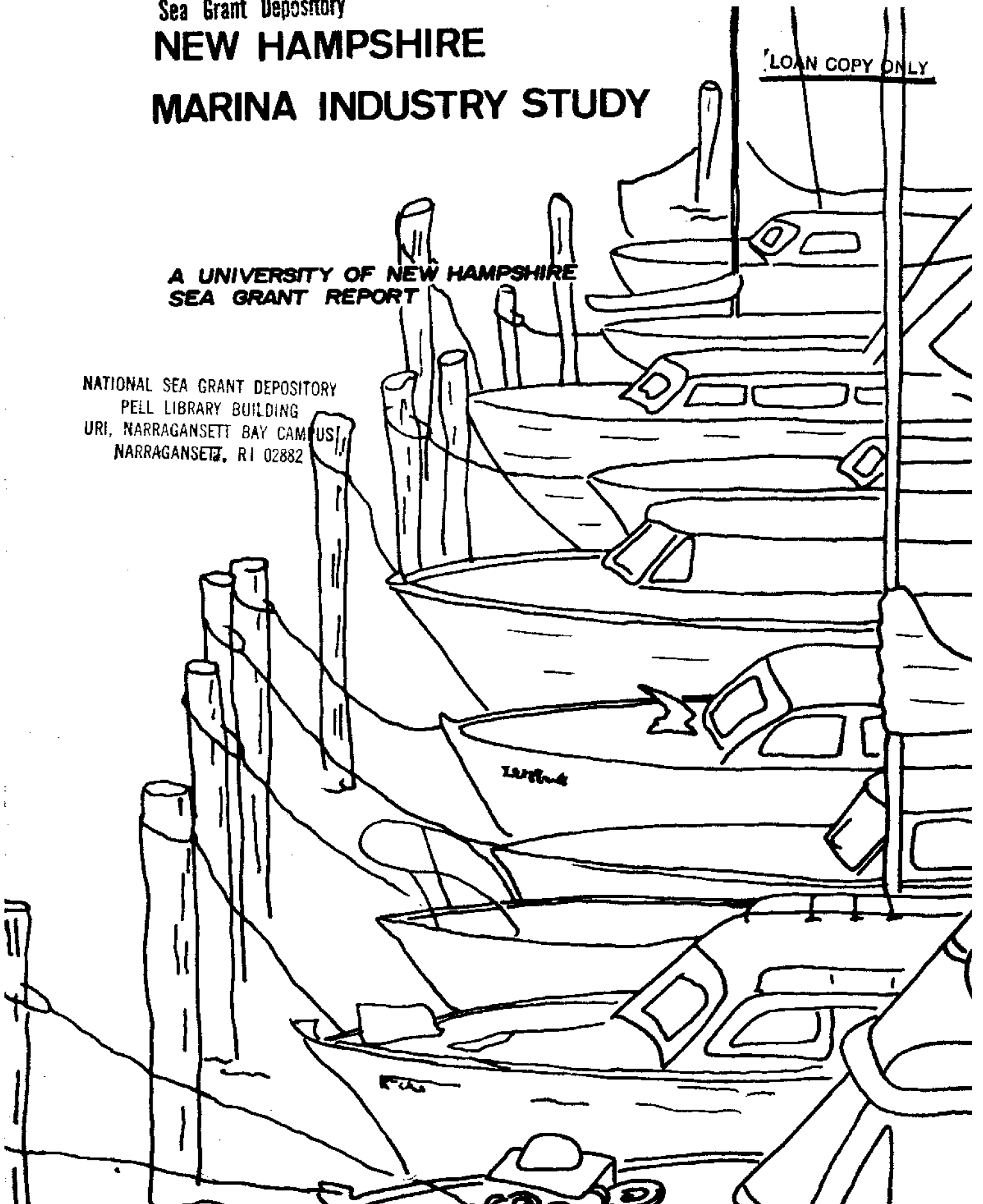
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NEW HAMPSHIRE
MARINA INDUSTRY STUDY

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NEW HAMPSHIRE MARINA INDUSTRY STUDY

by

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Durham, New Hampshire 03824

Sea Grant Technical Report

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June 1974

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The Marine Dealers Association of New Hampshire, Inc., made several important contributions to this study. The officers of the Association gave us guidance and encouragement in the study's early stages, developed mailing lists of marinas in the state, and wrote a letter of endorsement of the project that was mailed to the trade, which no doubt contributed to the high level of cooperation we received from the marina operators. The Association also provided financial support, which was not only an expression of their interest in the study, but which also made possible the detailed survey of marinas.

This report is hopefully only the first of a series which will present information, for both seacoast and inland locations, on the characteristics and preferences of the boating public and on the locational aspects of the marine trades industry. This New Hampshire report is one of a set being prepared by the six New England states and the state of New York.

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NEW HAMPSHIRE MARINA INDUSTRY STUDY

by

George W. Shaw and William F. Henry^{1/}

INTRODUCTION

During the 1960's there was a significant increase in boating in New Hampshire, and hand in hand with the rapid growth came increased demands for marina space and services. In several parts of the state at the time of this writing, buying a boat has second priority--number one priority is finding a place to keep it. (This does not refer to car-top or trailerable boats).

Also during the 1960's, communities, the state, and the general public had all increased their awareness of ecology, pollution problems, clear water, and public use of public land and water, just to mention a few of the areas of concern.

This study of the marina/marine oriented industry within New Hampshire was carried out in the early spring of 1973. This study covers the entire state of New Hampshire, both fresh and salt waters, and has as its underlying purpose a sincere desire of giving an overview of the industry, its economic impact, services performed for both New Hampshire and out-of-state boaters, tax base generated, and other pertinent data useful to the industry and the state. An informed populace--the marine industry, legislators, and state agencies--should lead to better understanding and thereby better laws and rules and regulations.

^{1/} Research Associate and Professor, respectively, Resources Development Center, University of New Hampshire.

This study is also aimed at being part of an area-wide report for the six New England states and the state of New York. Representatives of the seven state universities, the New England Marine Resources Information Program (NEMRIP), and the individual marine trade associations of several of the states had inputs into the forming of the marina questionnaire as used. After the seven individual state reports are completed, it is our expressed desire to be financially able to make a composite seven-state report.

In the past six years, boat registrations issued by the state of New Hampshire have increased 6 percent^{2/}, which is about equivalent to automobile registration increases in New Hampshire over this period^{3/}.

Boats used on the federally controlled waters of New Hampshire and issued certificates of number by the United States Coast Guard have increased 44 percent in the six years, 1967-1972. See Table 1.

In 1972 there were 360 documented vessels registered within the Portsmouth, New Hampshire, District. Information about size, type, or hull construction material on these was not available, but under weight and square footage regulations for documentation, with very few exceptions, these documented vessels would have to be 30 feet in length or longer.

In New Hampshire in 1972, there were 53,642 registered boats. This is the total of state registrations, and United States Coast Guard registered. The U.S. Coast Guard registers boats of 10 hp or more; this included all sailboats that use an auxiliary motor of

^{2/} Department of Safety, State of New Hampshire.

^{3/} Statistical Abstract of United States, 1971.

any kind of at least 10 hp (law in effect at time this survey was made). The New Hampshire Department of Safety registration includes all outboard motors and all inboard motors on sail or power boats. This does not include untold thousands of kayaks, canoes, paddleboats, row-boats, john boats, sunfish, sailfish, and other nonpowered sailboats.

TABLE 1

Total Boat Registrations in New Hampshire:
State Department of Safety and United States
Coast Guard; Boat Registrations, 1967-1972

	YEAR						% increase from 1967
	1967	1968	1969	1970	1971	1972	
N.H. Dept. of Safety ^{a/}	43,326	45,973	45,074	47,322	47,271	46,021	6.2
U.S. Coast Guard	5,295	5,725	6,438	7,162	7,928	7,621	43.9
Total N.H. ^{b/}	48,621	51,698	51,512	54,484	55,199	53,642	10.3
Total U.S. ^{c/}	4,458,893			5,510,092			23.6

^{a/} Total boats registered: private, commercial, and dealer registration.

^{b/} These numbers do not include vessels documented by the Department of Commerce, which in 1972 amounted to 360 vessels.

^{c/} Does not include boats located in Alaska, District of Columbia, New Hampshire, Washington, and Guam registered by the individual units of government as these five governments are not in compliance with the federal Boat Registration Act.

NOTE: The State Department of Safety, marina operators, and stores selling boat registrations all expressed the feeling that the 1972 drop in boat registration was due to the wet summer with an above average number of rainy weekends during the boating season.

FIGURE 1

Boat Registrations, New Hampshire, 1967-1972

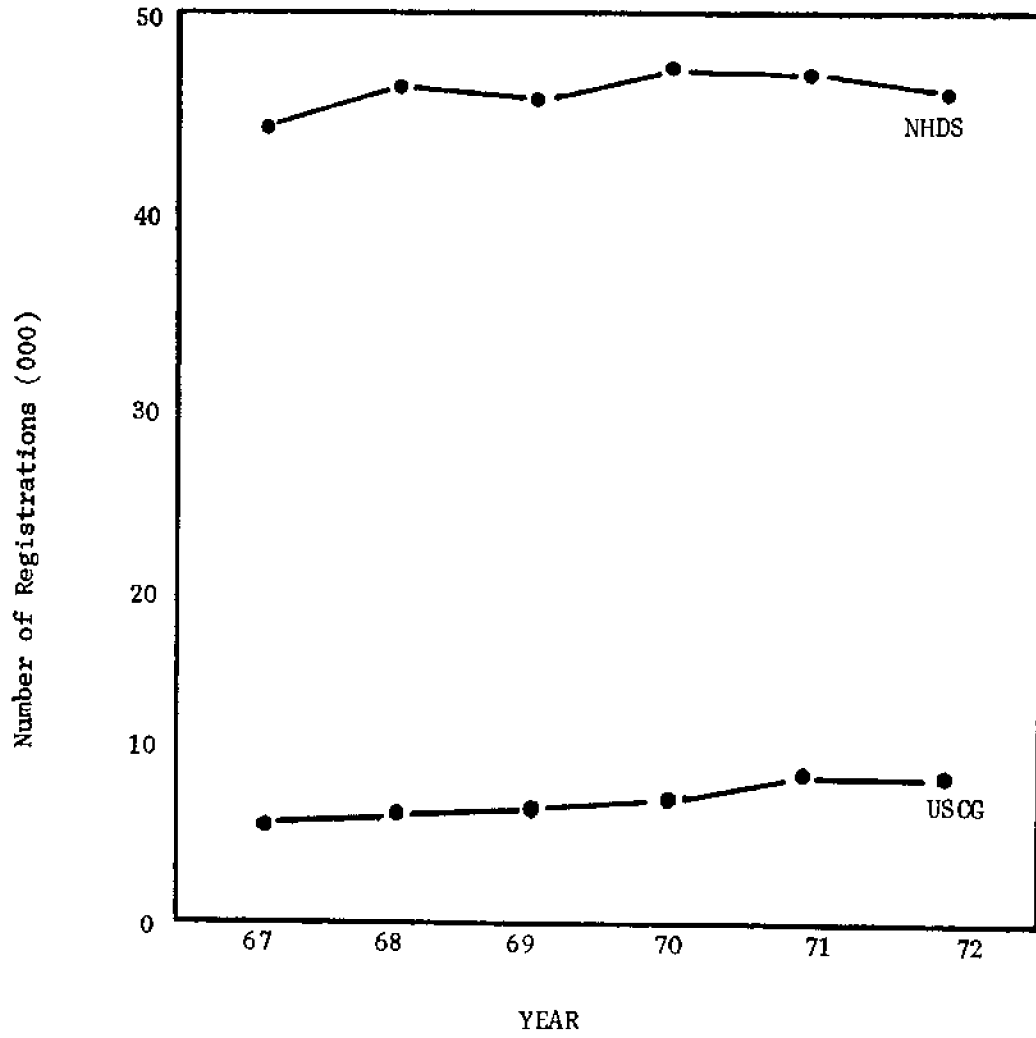


TABLE 2

Motorboat Registrations, New Hampshire, 1972

OUTBOARD MOTORS

<u>Horsepower</u>	<u>Number Registered</u>	<u>Regulation Fee</u>	<u>Total Fees Paid</u>
5 hp and under	9,842	@ \$4.00 =	\$ 39,368.00
5.1 hp to 13.9 hp	9,309	@ 5.00 =	46,545.00
14 hp to 40 hp	10,791	@ 6.00 =	64,746.00
Over 40 hp	10,219	@ 6.00 =	61,314.00
	<u>40,161</u>		<u>\$211,973.00</u>

INBOARD BOATS

<u>Length</u>			
18' and under	2,165	@ \$6.00 =	\$ 12,990.00
Over 18' through 26'	2,184	@ 9.00 =	19,656.00
Over 26'	474	@ 11.00 =	5,214.00
Inboard	<u>4,823</u>		<u>\$ 37,860.00</u>
Total Pleasure boats	44,984		\$249,833.00

<u>Commercial Boats and Motors</u>	911
<u>Dealer Registration</u>	<u>236</u>
Total Registration	46,131
<u>Initial Plates</u>	194
<u>Pilot Certificates</u>	616

SOURCE: Adapted from New Hampshire Department of Safety, Division of Safety Services.

TABLE 3

Motorboat Registrants in New Hampshire by State of Residence, 1972

Forty-four thousand, nine hundred eighty-four persons from 38 states, the District of Columbia, Canada, the Virgin Islands, and Japan registered private boats and motors in New Hampshire during the 1972 season. The following shows the number of registrants from each state or other location:

<u>State or Location</u>	<u>Number of Registrants</u>	<u>% of Total</u>
New Hampshire	23,476	52.2
Massachusetts	15,627	34.7
Connecticut	1,994	4.4
New York	985	2.2
New Jersey	658	1.5
Vermont	648	1.4
Rhode Island	421	all others
Pennsylvania	310	less than 1%
Maine	235	
Florida	144	
Maryland	87	
Ohio	73	
Virginia	73	
Illinois	31	
Delaware	30	
Michigan	29	
Canada	19	
District of Columbia	17	
California	16	
North Carolina	15	
Indiana	10	
Georgia	10	
Tennessee	9	
South Carolina	9	
Texas	7	
Arizona	6	
Missouri	6	
Wisconsin	6	
Kentucky	5	
Alabama	4	
Mississippi	4	
Minnesota	4	
Colorado	4	
Louisiana	2	
Arkansas	2	
Virgin Islands	2	
Japan	2	
Kansas	1	
Nebraska	1	
Iowa	1	
New Mexico	1	

(TABLE 3 Cont'd.)

<u>Summary by National Region</u>	<u>Number</u>	<u>% of Total</u>
New England	42,401	94.3
Middle Atlantic	1,970	4.4
South Atlantic	368	.8
East North Central	149	.3
South Central	33	.1
Western	27	.1
West North Central	13	--
Foreign	<u>23</u>	<u>.1</u>
Total	44,984	100.0

MARINA SAMPLE

Personal interviews were made to 45 marinas in the state. A letter from the Marine Dealers Association of New Hampshire, Inc., was sent to each marina prior to the visit, and a news release with accompanying picture had state-wide coverage via the several news media. Most of the marinas gave complete cooperation with the survey questionnaire. For the four interviewed marinas that did not choose to answer the questionnaire completely, data from firms of like size that gave complete answers were used to develop a regression equation from which it was possible to predict the missing values with a fairly high order of accuracy.

Hebr

The 45 marinas all performed some or all of the primary services such as dockage, supplies, repairs, winter storage, etc., for pleasure boats. They ranged from very large professionally managed year-round corporations to the very small family operated, part-time business.

Totals for the number of boats by type and size in the several tables are accurate for marina-based water craft for the calendar year of 1972, but in no way can be reconciled with the 53,642 total registered boats. Total registered boats cover many car toppers and trailerable boats, as well as larger craft kept at private moorings and docks and at private clubs. This study made no attempt to inventory prams and yacht tenders of which there is a large number in the state.



ECONOMIC REPORT

In dealing with salt water and fresh water marine industry of the state we observe three scenes: (1) the water based and water oriented marina, (2) the boat building, i.e., manufacturing industry within the state, and (3) the marine retail dealers who operate roadside along our busy highways.

Scene 1, the water based marina, is listed and reported as a unit. Scenes 2 and 3, the boat manufacturing and roadside marinas, are listed as one group to eliminate any chance of identification or disclosure.

As the tables in the report show, these make up reported gross receipts of over \$16 million for 1972.

Scene 1	\$11,202,070.00
Scenes 2 and 3	<u>5,634,450.00</u>
Total reported gross receipts	\$16,836,520.00 ^{4/}

Based upon answers given to the questionnaire, 78 percent of the monies received was from persons residing in other states. Worded another way, the marine trade industry in New Hampshire was responsible for the expenditure of \$13,173,204 by non-residents in 1972 via the marine, boat manufacturing industry, and the large by-the-side-of-the-road marine retail sales store.

State of New Hampshire boat registrations (44,984) brought into the state treasury the sum of \$249,833 in 1972. This figure is for pleasure boats only. According to state records as to state of

^{4/} We asked for and believe we received only the marina/marine oriented gross receipts--not sales of camping equipment, truck campers, snowmobiles, etc.

origin of applicant for registration, approximately 50 percent were from out of state.

The \$249,833 is recorded in the state treasury records as follows:

Department of Safety	\$204,849
State Water Resources Board	<u>\$ 44,984</u>
	\$249,833

Forty-four thousand, nine hundred eighty-four persons from 38 states, the District of Columbia, the Virgin Islands, Canada, and Japan registered private boats and motors in the 1972 season. (This is entirely separate from boats registered, mainly on salt water, with the United States Coast Guard). See Table 3 for listing of number of registrants from each state. In addition to the \$249,833, all field agents who sold boat registrations received a fee of \$.50 for selling the registrations for the state. This \$.50 fee remained with the Collecting Agent. This amounted to \$20,618.50.

Another source of revenue is boat tax monies received where boats are moored or stored as of April first of each year. These monies all stay in the towns and cities where collected, except for a very small administration cost which goes to the New Hampshire State Tax Commission. In 1972 the administration costs were approximately \$.42 per boat taxed, which amounted to an infinitesimal fraction of the total taxes collected.

As can be seen in Table 4 from the list prepared by the State Tax Commission, a total of \$241,187.48 was collected in boat taxes in New Hampshire last year. Of this total, less than \$4,800 went to the state for administrative costs, and the balance was retained by the cities and towns where the tax was collected.

TABLE 4

Number of Boats Taxed, Boat Valuation, and Boat Taxes Assessed,
Selected Cities and Towns, New Hampshire, 1972

<u>Town/City</u>	<u>Number Boats Taxed</u>	<u>Total Boat Valuation</u>	<u>Boat Taxes Assessed</u>
Alton	396	\$ 172,850	\$ 10,889.55
Ashland	117	66,485	2,061.04
Center Harbor	209	118,059	3,777.89
Gilford	916	1,997,550	47,941.20
Hampton	86	95,150	3,710.85
Holderness	437	91,372	5,427.50
Laconia	923	913,245	41,643.97
Meredith	498	1,001,800	24,443.92
Moultonboro	148	80,800	3,716.80
Newbury	166	109,450	2,626.80
Newington	261	717,850	9,332.05
Ossipee	72	32,035	1,159.67
Portsmouth	214	185,500	6,863.50
Sunapee	605	431,349	10,352.38
Tuftonboro	510	287,100	15,503.40
Wolfeboro	<u>212</u>	<u>103,835</u>	<u>7,683.79</u>
Sub-total 16 Towns/Cities	5,770	\$6,404,430	\$197,134.31
Bal. 218 Towns/Cities	<u>5,606</u>	<u>2,399,161</u>	<u>44,053.17</u>
Total	11,376	\$8,803,591	\$241,187.48

Source: New Hampshire State Tax Commission.

Of the 44,984 boats and motors registered in New Hampshire last year, 23,476 were New Hampshire resident owned. Add to that about 7,600 boats registered in New Hampshire with the United States Coast Guard, and it is evident that the 11,376 total number of boats taxed last year seems small. It is well known that each fall some boats are moved great distances for the obvious reason of avoiding the tax completely or to be where the tax is of a lesser amount.

Another source of revenue to the state of New Hampshire is unclaimed road toll tax on gasoline used for marine purposes. Individuals who purchase gasoline for marine use in the state of New Hampshire can apply on the official form RT 122^{5/} for .09 cents per gallon refund. The form has to be properly filled out and all receipts for gasoline attached and filed within six months of use to be valid.

The retail dealer (the marina or boat yard operator) can file on official form RT 115 for a 1 percent refund on gross toll paid every six months. All applications for refund must be made under penalties of perjury and shall be made semi-annually within 90 days after June 30 and December 31, respectively. This is known as a "spillage refund". The refund is figured: gross purchases of gas in gallons x 9 cents per gallon = total toll paid; refund is 1 percent of this total toll paid.

Each marina shall report on official form RT 120 the gallons of motor fuel sold and delivered direct to fuel tanks and supplementary fuel tanks. Unrefunded road tax used for marine use goes 50 percent to the Department of Safety Service and 50 percent to the Fish and Game Department.

5/ See Appendix for samples of Division of Motor Vehicles Road Toll Tax Forms.

As can be seen from Table 5, \$66,349.26 went into the state treasury as money that could have been refunded to individual purchasers of fuel for marine purposes, but was never applied for and therefore unrefunded. One-half went to the Department of Safety Service and one-half to the Fish and Game Department.

TABLE 5

Gallons of Fuel Delivered, Amount Refunded, and
Amount Unrefunded in Gallons and in Dollars

	<u>1971</u>	<u>1972</u>
Total gas delivered to wharf tanks & pumps	1,175,146 gal.	1,082,245 gal.
Amount of gas for which refund was made to individual boat owners	381,253 gal.	345,031 gal.
Number of individual boat owners applying	1,455	1,288
Dollar amount refunded to individuals*	\$29,690.10	\$31,952.79
Amount of gas for which refund was not claimed	793,893 gal.	737,214 gal.
Unrefunded dollars	\$63,149.41	\$66,349.26

*Note: $\frac{1}{2}$ of 1971 refund was 7 cents
 $\frac{1}{2}$ of 1971 refund was 9 cents.

1972 was all at 9 cents per gallon.

SOURCE: State of New Hampshire, Department of Safety, Division of Motor Vehicles, Road Toll Section.

It is known that the gasoline consumption for marine use was a great deal more than shown. How much more is an unknown factor. It is known that many trailerable boats fill their tanks at a highway gas station. Also, many people with in-water boats bring their gas in cans from a highway gas station and refill their boat tanks in this manner. However, the accounting for delivery to wharf tanks is accurate.

TABLE 6

Summary of Marine Industry Economic Impact
on the State of New Hampshire, 1972

Reported marine/marina trade gross receipts	\$16,836,520.00
State of New Hampshire Boat Registration fees	249,833.00
Property tax on boats in New Hampshire as of April 1, 1972	241,187.48
Unrefunded non-road toll tax	<u>66,349.26</u>
	\$17,393,889.74

According to state distribution of money received for boat registrations and unrefunded gas tax for the year 1972, the following departments received these monies directly related to the marina/boating industry.

State Department of Safety	\$238,023.63
State Water Resources Board	44,984.00
Fish and Game Department	<u>33,174.63</u>
	\$316,182.26

BANKING AND FINANCING

There are a few banks in the state that provide bank loans on individual boat purchases and on floor planning of boats for dealers, but by and large the vast majority of banks in the state stay away from boat loans. It would appear from our discussions that the banks do not lend on boats for the simple reason that they do not understand the business and have never had the opportunity to learn about it.

Some loans are made directly between the boat purchaser and the bank, but very few. For these loans made directly from the bank at the time of our interviews with bankers, the going interest rate was 9-10 percent. Ordinarily these are five-year loans, but some loans on fiberglass larger boats are now being written for seven years.

Most all boat loans are through the dealer. The dealer sells the boat, agreeing to finance it. He has the customer fill out a credit reference slip for the bank. If approved, the monthly payments are made directly to the bank. The dealer cosigns and in fact guarantees the loan to the bank. If the customer fails to keep up his payments with the bank, the bank contacts the dealer and asks him to repossess the boat and pay off the bank loan. With a loan financed through the dealer, the customer pays 11-12 percent interest, and normally, signs for a loan for five years. The dealer picks up approximately 2 percent of the interest charged for his part in the transaction.

Several bankers mentioned that at least two large credit corporations were doing a very large volume in loans in the recreation business, for both floor planning and retail paper. These credit corporations were not interviewed, but it was reported that interest rates on their loans are considerably higher than for banks and that such loans are easier to obtain.

MARINA INTERVIEW RESPONSES

I. Business Organization and Management

The first group of tables is concerned with the marina business as an industry and its management. Table 7 shows that by far the largest number of marinas, 66.7 percent, are incorporated with 10 or fewer stockholders. Individual proprietorship is the next largest type of ownership, having 26.7 percent; while marinas with 10 or more stockholders and partnerships together consist of a total of 6.6 percent.

Table 9 shows that of the 45 marinas interviewed, four have paid managers and the rest are owner operated.

Of all the marinas, 34, or 75.6 percent, were operating on a year round schedule. Sixty percent, or 27, of the marinas engaged in some other area of sales unrelated to the marine industry. Nine different types of businesses were listed, of which 31 percent, or 15, sold snowmobiles, which was by far the most common "other type" of extra business engaged in. This practice, in many respects, is natural for New Hampshire: water sports, boating etc., in the summer and a good snow cover in the winter, with winter sports and snow-mobiling. The marriage of the two types of businesses has been, from the standpoint of holding engine mechanics, a blessing. Except for a very large marina with a big backlog of repairing without the snowmobiles, it would be hard to keep and pay their mechanics on a year-round basis.

TABLE 7

Type of Business Organization

	<u>Number</u>	<u>Percent</u>
Corporation:		
10 or less stockholders	30	66.7
More than 10 stockholders	1	2.2
Individual proprietorship	12	26.7
Partnership	<u>2</u>	<u>4.4</u>
Total	45	100.0

TABLE 8

Type of Operation

	<u>Number</u>	<u>Percent</u>
Marina	43	95.6
Boatyard	<u>2</u>	<u>4.4</u>
Total	45	100.0

TABLE 9

Type of Management

	<u>Number</u>	<u>Percent</u>
Paid Manager	4	8.9
Owner	<u>41</u>	<u>91.1</u>
Total	45	100.0

TABLE 10

Length of Time Business Operated (Per Year)

	<u>Number</u>	<u>Percent</u>
All year	34	75.6
Part of year	<u>11</u>	<u>24.4</u>
Total	45	100.0

TABLE 11

Is Marina Engaged in Other Type of Business?

<u>Response</u>	<u>Number</u>	<u>Percent</u>
Yes	27	60.0
No	<u>18</u>	<u>40.0</u>
Total	45	100.0

If yes, what type of business?

<u>Type</u>	<u>Number*</u>
Real estate	3
Motel	1
Snowmobiles	15
Winter sports	3
Island maintenance	2
Signs	1
Garages	3
Store	4
Camping grounds	<u>1</u>
Total	33

*One marina responded yes to operating another business, but did not specify what kind.

*Several reported two or more types of other businesses.

II. Storage and Berthing Capacity

Tables 12, 13, 14, 15, and 16 give a view of the different types of berthing and storage, both summer and winter, that are available to the New Hampshire boatman. As was stated in the beginning of this report, having a place to berth a boat in the summer and a place to store it in the winter have become critical; and as the boating industry grows, as it will continue to do, berthing and storage will grow in importance. The five main types of berthing in New Hampshire are moorings or stakes, breasted on docks, slips, tie-offs, and dry-stack storage.

When one thinks of a typical marina, he pictures rows of boats berthed in slips. This type of berthing accommodates many boats at New Hampshire marinas. Table 12 shows it as the most common berthing type utilized. Of the total 3,677 berthed boats during the summer of 1972, 3,061, or 83.2 percent, rented slips. All of the other types of berths did not even come close in frequency of use to matching slips. The others, when added together totalled 616, or 16.8 percent.

A common form of berthing for out-of-staters is dry-stack storage. This type is basically used for berthing boats belonging to customers who only use their boats on weekends or less frequently. Twenty-one, 46.7 percent, of the marinas interviewed have dry-stack storage. The average fee paid to marinas in both summer and winter is \$160 per season or \$8 per linear foot in the summer and \$6 per linear foot in the winter. Many more boats (2,423) are stored in dry-stack in the winter than those in the summer (202) which must be moved or transported by forklift or marine travel lift to the water each time the customer arrives.

On Table 14, one can see that the largest number of boats stored inside in the winter are inboard-outboards in the size range of 16-26 feet in length. The outboards, as a group, are the largest category stored inside with 1,919, or 37.2 percent, out of a total of 5,161 stored boats.

Two hundred and eight inboards are stored outside, with the most common length being 26-40 feet long. Very few boats, comparatively, are kept in wet storage. Of a total of 25, 13 are 26-40 foot inboards. With one exception, all the boats in wet storage were on salt water. This is natural as all the fresh water lakes of New Hampshire (where 91 percent of the marinas are located) freeze over every winter. As the number of boats increase and land for marinas becomes harder and harder to obtain, more marinas will go to the use of air bubble systems to keep open water near their docks and slips, so they can both protect their installation from ice damage and store more boats in wet storage.

Accommodating boating enthusiasts in New Hampshire is by far not only limited to New Hampshire residents. In fact, when weighted averages were made computing the out-of-state income coming to New Hampshire marinas, the authors arrived at a total of 78 percent as being the figure to represent the percent of this incoming money from out-of-state customers.^{6/}

^{6/} More statistics relating to this figure can be found under "Economic Report" on page of this report.

TABLE 12

Berthing Capacity in Use, Summer 1972

<u>Type</u>	<u>Number of Boats</u>	<u>Average Seasonal Charge</u>
Mooring or stakes	170	\$ 98
Breasted on docks	201	77
Slips	3,061	195
Tie-offs	43	113
Dry-stack	<u>202</u>	160
Total	3,677	

TABLE 13

Do you Presently Use Dry-Stack Storage?

<u>Response</u>	<u>Number</u>	<u>Percent</u>
Yes	21	46.7
No	<u>24</u>	<u>53.3</u>
Total	45	100.0

Dry-Stack Storage Facilities

<u>Season</u>	<u>No. of Boats</u>	<u>Per Season</u>	<u>Average Fee Per Linear Foot</u>	<u>Square Foot</u>
Summer	202	\$160	\$8	0
Winter	2,423	\$160	\$6	\$1

TABLE 14

Winter Storage (Boats Stored Inside at Marinas)

<u>Length</u>	<u>Sail</u>	<u>Outboard</u>	<u>Inboard</u>	<u>In/outboard</u>	<u>All Boats</u>
		<u>Number</u>			
Less than 16'	97	894	38	72	1,101
16-26'	100	1,025	762	1,552	3,439
26-40'	5	0	582	6	593
40' and over	<u>1</u>	<u>0</u>	<u>27</u>	<u>0</u>	<u>28</u>
Total	203	1,919	1,409	1,630	5,161

TABLE 15

Winter Storage (Boats Stored Outside at Marinas)

<u>Length</u>	<u>Sail</u>	<u>Outboard</u>	<u>Inboard</u>	<u>In/outboard</u>	<u>All Boats</u>
		<u>Number</u>			
Less than 16'	11	73	5	0	89
16-26'	66	107	99	55	327
26-40'	76	0	278	3	357
40' and over	<u>3</u>	<u>0</u>	<u>24</u>	<u>0</u>	<u>27</u>
Total	156	180	406	58	800

TABLE 16

Winter Storage (Wet Storage at Marinas)

<u>Length</u>	<u>Sail</u>	<u>Outboard</u>	<u>Inboard</u>	<u>In/outboard</u>	<u>All Boats</u>
		<u>Number</u>			
Less than 16'	0	0	0	0	0
16-26'	1	0	1	0	2
26-40'	7	0	13	1	21
40' and over	<u>0</u>	<u>0</u>	<u>2</u>	<u>0</u>	<u>2</u>
Total	8	0	16	1	25

III. Expansion

A new interest in the environment, additional numbers of boats, and an increase in governmental involvement all have contributed to the need for marinas to expand their facilities recently in New Hampshire. Of the marinas in this study, 73.3 percent reported that they have expanded during the past five years. The two most common types of expansion were increased storage capacity and more dock space, having 41 percent and 27.9 percent, respectively. Ninety-seven percent said that their expansion increased the number of boats that they could handle.

Thirty-three of the forty-five marinas have increased their capacities during the past five years. Where future expansion is planned, larger storage facilities and dry-stack storage are seen as especially important.

On Table 19 (past expansion), of those marinas which have enlarged their facilities, 781 additional boats were able to be handled or stored in summer and in winter 1,504 additional.

It is obvious that more marinas concentrated on winter storage capacity (25 rather than 19 which increased summer facilities).

Of those 16 marinas which reported future expansion for operation, their plans allow for an additional berthing of 1,132 boats during the next five years. The majority of the boats are 16-26 feet in length. Winter storage expansion plans for the next five years are proposed to accommodate 2,270 more boats.

Of the 31 marinas which reported they would expand for winter storage during the next five years, 26 said they planned to build new or to enlarge present dry-stack storage space.

Dry-stack storage, in the opinion of many, is the space saver of the future for the marinas with limited land available or with the prospect of exorbitant land costs. For winter storage, obviously many more boats can be stored under one roof by stacking them in racks, 4-6 boats or more high. For summer in and out storage, costly slips and dock space can be kept to a minimum. Some of the selling points to the customer are no storm damage, no deterioration from sun on boat or canvas, underwater parts can be readily inspected, no chafing of lines or dock damage, no water accumulation, and no boat theft.

Some marina operators are envisioning a boat canal right into the stack storage building where an overhead crane fed the proper sequence of numbers like dialing a phone will pick up a boat at a certain spot in the canal and place it in, say, rack number 127. Obviously this process could be reversed, and boat in rack 127 or any other could be picked up and placed in the canal. Most all the written materials we have seen on this type of storage talks of boats up to 26 feet in length.

Twelve marinas reported that they could not expand their facilities within the next five years. The most commonly expressed restriction to expansion was financial limitations. Some responded that they had no more land or space, had a bad shoreline for possible expansion, or that the local laws and ordinances had put a freeze on marina expansion, therefore, no possible means of growth could be proposed.

TABLE 17

Did You Increase the Size of Your Marina
During the Past Five Years?

<u>Response</u>	<u>Number</u>	<u>Percent</u>
Yes	33	73.3
No	<u>12</u>	<u>26.7</u>
Total	45	100.00

<u>Types of Expansions</u>	<u>Number*</u>	<u>% of All Expansions</u>
Dock space	17	27.9
Added moorings	4	6.5
Expanded shoreline	3	4.9
Increase rail capacity	3	4.9
Increase storage capacity	25	41.0
Increase service capacity	3	4.9
Fork truck	2	3.3
Other	<u>4</u>	<u>6.6</u>
Total	61	100.0

*Note: Many marinas expanded in several of the categories listed.

TABLE 18

Did This Increase Your Capacity in Handling Boats?

<u>Response</u>	<u>Number</u>	<u>Percent</u>
Yes	32	97.0
No	<u>1</u>	<u>3.0</u>
Total	33	100.0

TABLE 19

Increased Capacity, Past Expansion (Summer)

<u>Size of Boat</u>	<u>No. of Marinas</u>	<u>No. of Boats</u>
Less than 16'		118
16-26'		550
26-40'		103
40' and over		<u>10</u>
Total	19	781

Increased Capacity, Past Expansion (Winter)

<u>Size of Boat</u>	<u>No. of Marinas</u>	<u>No. of Boats</u>
Less than 16'		311
16-26'		905
26-40'		278
40' and over		<u>10</u>
Total	25	1,504

TABLE 20

Do You Plan to Increase Your Capacity
During the Next Five Years?

<u>Response</u>	<u>Number</u>	<u>Percent</u>
Yes	33	73.3
No	<u>12</u>	<u>26.7</u>
Total	45	100.0

TABLE 21

Proposed Increased Capacity, Future Expansion (Summer)

<u>Size of Boat</u>	<u>No. of Marinas</u>	<u>No. of Boats</u>
Less than 16'		102
16-26'		897
26-40'		133
40' and over	<u> </u>	<u> 0 </u>
Total	16	1,132

Proposed Increased Capacity, Future Expansion (Winter)

<u>Size of Boat</u>	<u>No. of Marinas</u>	<u>No. of Boats</u>
Less than 16'		539
16-26'		1,428
26-40'		303
40' and over	<u> </u>	<u> 0 </u>
Total	31	2,270

IV. Limitations to Service

Questions 22 and 23 gave positive proof to a fact that we felt sure of before the start of the study. That, in essence, is that the demand for marina services is greater than the supply. Of the marinas interviewed, 37, or 82.2 percent, said yes to the question "Last summer did you turn away customers for lack of dockage or moorings?" Worded another way, the question to the marina operators would have indicated that most of them could have had more summer customers if they had had more facilities to handle the boats. The facilities could have been of many kinds or types; i.e., more dock space or slips, more moorings, dry-stack storage for in and out boat use, or in some cases just more suitable land where small boats could be taken out and stored on the lawn when not in use.

Likewise, 21, or 46.7 percent, of the marinas interviewed had to turn away winter storage customers for lack of facilities.

This shortage of facilities to meet the boating public need for both summer and winter storage is fairly common. (See Section III, Expansion). Of the marinas in this study, 73.3 percent reported they had expanded their facilities within the past five years. Regarding future expansion covering the next five years, 16 marinas have plans to expand summer storage and 31 plan to expand winter storage.

It is interesting to note that of future summer and winter expansion plans, the operators are estimating space for 1,132 more boats in the summer and 2,270 in the winter. Of this total increase of 3,402 boats at existing marinas in the next five years, 2,324 of these spots are planned for boats 16-26 feet in length.

TABLE 22

Summer Boat Storage;
Last Summer Did You Turn Away Customers Because
of Limitations?

<u>Response</u>	<u>Number</u>	<u>Percent</u>
Yes	37	82.2
No	<u>8</u>	<u>17.8</u>
Total	45	100.0

TABLE 23

Winter Boat Storage;
Last Winter Did You Turn Away Customers Because
of Limitations?

<u>Response</u>	<u>Number</u>	<u>Percent</u>
Yes	21	46.7
No	<u>24</u>	<u>53.3</u>
Total	45	100.0

TABLE 24

Shoreline, Water Area, Storage Area Are Best Answered
by Giving the Averages of the 45 Marinas Interviewed

<u>Marina Characteristics</u>	<u>Averages</u>
Shore length	504 feet
Total land area	8 acres
Total water areas used	2 acres
Inside storage	38,078 square feet
Outside storage	31,700 square feet

77.8 percent, or 35 marinas, had unused land for future use.

22.2 percent, or 10 marinas, had no extra land.

V. Facilities and Services

Marina/marine facilities are of utmost importance for serving and satisfying all boat owners. In the past, a typical marina might have consisted of limited dock space, a launching ramp, and a small parking area. Today, with expansion in boat ownership and use and with the increasing evolution toward larger yachts and vessels, marina owners and managers have learned to adapt and enlarge their facilities to satisfy the many new needs of their customers. It is important to have safe and convenient moorings and adequate sized channels. Facilities such as electrical outlets dock-side, grocery stores, bath and shower houses, ice machines, convenient gas and oil locations, dock-side sewage disposal, and adequate parking areas are just a few of the newly acquired necessities supplied for the many avid boaters.

From the information in Table 25, it is apparent that practically all of the marinas interviewed have gas, oil, and marine supplies readily available to their customers. Showers, restaurants, and ice are the three least often supplied facilities or services.

TABLE 25

Facilities and Services Supplied by Marinas

<u>Facility or Service</u>	<u>Marinas Providing</u>	
	<u>Number</u>	<u>% of All Marinas</u>
Marine supplies	44	97.8
Oil	44	97.8
Gas	42	93.3
Launching ramp	38	84.4
Restrooms	32	71.1
Fresh water (dock side)	28	62.2
Electricity (dock side)	26	57.8
Ice	16	35.6
Holding tank facilities	9	20.0
Showers	7	15.6
Restaurant	3	6.7

Most of the marinas, 38 out of 45, had a launching ramp for public use. Of those that said they charged a fee, the average launching fee was \$1.75.

With the state of New Hampshire having a holding tank law in effect on state controlled fresh water, we were surprised that only 9, or 20.0 percent, of the marinas reported having pump out facilities on their premises. At the time of this writing they are not required at the salt water marinas, and some of the marinas interviewed did not handle boats of "live-aboard-size," but undoubtedly more marinas in the state will have to consider holding tank, pump out facilities for the future.

TABLE 26

Marina Sewage and Water Facilities

<u>Type</u>	<u>Sewage Disposal System</u>	
	<u>Number</u>	<u>Percent</u>
City	8	17.8
Septic tank	33	73.3
Other (gas toilets, holding tank)	<u>4</u>	<u>8.9</u>
Total	45	100.0

TABLE 27

Source of Water

<u>Source</u>	<u>Number</u>	<u>Percent</u>
City	17	37.8
Own well	22	48.9
Lake	<u>6</u>	<u>13.3</u>
Total	45	100.0

Boat protection, management of automobile parking lots, and general security are becoming more and more important at marinas. Obviously if the customer has a choice, he will pick the spot with the seemingly least risk for his boat.

TABLE 28

Marina Security Measures

<u>Measure</u>	<u>Number</u>	<u>Marinas Providing</u>
		<u>Percent</u>
Night illumination	42	93.3
Police patrol	38	84.4
24-hour security	24	53.3

Anyone who has traveled the New Hampshire marina circuit will find the night illumination is not as bright as the 42 "yes" answers would indicate!

VI. Repairs

Doing repairs on boats constitutes a major portion of the gross income received by many of the marinas in New Hampshire. All but four of the marinas interviewed do repairs on the various types of boats which they serve. The number of marinas doing repairs on types of boats and engines is shown in the following table.

TABLE 29

Marinas Repairing Hulls and Engines

<u>Type of Boat</u>	<u>Number</u>	<u>Percent of 41</u>
Wooden boats	29	70.7
Fiberglass boats	35	85.4
Inboard engines	36	87.8
Outboard engines	39	95.1

One of the problems associated with doing repair jobs for their customers is for some marinas to keep their help. One-third reported that they had some difficulty in keeping adequate help, with the most difficult being engine mechanics. Some reasons for this problem are cited in Table 30.

TABLE 30

Difficulties Experienced by Marinas in Obtaining and Keeping Qualified Help

<u>Type</u>	<u>Number of Difficulties</u>	<u>Percent of All Difficulties</u>
Carpenters	5	15.6
Painters	6	18.7
Engine mechanics	15	46.9
Yard help	<u>6</u>	<u>18.8</u>
Total number of difficulties	32	100.0

The reasons for the difficulties in getting and keeping qualified help were mostly lack of training in the required skills for the marine business and the seasonal nature of employment. Well trained mechanics are hard to employ in New Hampshire since the actual boating season is very active for approximately five months, at the most, out of the year. The reasons for the difficulties and the number responding to each is as follows:

<u>Type</u>	<u>Reason</u>	<u>Number</u>
Carpenters	Need training schools	3
	Too seasonal	2
		<u>5</u>
Painters	Not well trained	2
	Too seasonal	2
	No answer	<u>2</u>
		6
Engine mechanics	Not well trained--need in-state training schools	7
	No answer	2
	Too seasonal	<u>6</u>
		15
Yard help	Not well trained--need vocational training school	1
	No answer	2
	Too seasonal	<u>3</u>
		6

VII. Receipts and Employment

1. Gross Receipts

One way of deciding exactly how successful an industry is is by assessing its total gross income. Marinas of all sizes were interviewed in this report, therefore gross numbers vary widely. The figures below represent total sums of all of the 45 marinas contacted.

TABLE 31

Gross Receipts, 45 Marinas, New Hampshire, 1972

	<u>Total Receipts</u>	<u>Number Marinas Reporting Receipts</u>
Services		
Summer dockage and moorings	\$ 537,704	43
Winter storage	906,374	42
Launching and docking	35,222	38
Brokerage	858,251	20
Repairs	1,084,287	40
Sales and Rentals		
Marine store	1,004,686	39
Boat and engine sales (new and used)	6,011,966	37
Gas and oil	517,820	42
Charter/Rental	228,865	25
Restaurant	<u>16,895</u>	3
Total	\$11,202,070	

Calculating each marina separately as to gross receipts and percentage the owner reported as having received from out-of-state customers the weighted average proportion of gross income is 78 percent. So, of the \$11.2 million of gross receipts for marinas, \$8.7 million came from out-of-state boaters.

2. Marina Employment

Employment in the marinas for the two seasons--summer and winter-- is shown in Table 32 by type of activity.

TABLE 32

Marina Employment

<u>Type</u>	<u>Summer</u>	<u>Winter</u>
Yard	148	69
Office	64	45
Dock	70	--
Sales	21	10
Mechanics	54	37
Repairs	13	14
Managers	<u>6</u>	<u>6</u>
Total	376	181

Labor charges as given to the interviewers ran from \$6.50 per hour to \$11.00 per hour.

VIII. Other Marine Industries

In the Economic Report section, these 11 manufacturing firms and roadside outlets were reported as generating total sales of \$5.6 million. They are not considered to be marinas, so were not included in the analysis in the body of this report. However, they do provide considerable employment, sell a large number of boats, store some boats, and so have an appreciable economic impact on the state. The two tables below are a measure of two important activities--employment and winter storage--of these firms.

TABLE 33

Boat Manufacturers and Large by the Highway Marine Sales Outlets, 11 Firms Interviewed

<u>Type of Employees</u>	<u>Number of Employees</u>	
	<u>Summer</u>	<u>Winter</u>
Yard	17	12
Office	25	23
Manufacturing plant	40	40
Sales	28	15
Mechanics and general repair	<u>11</u>	<u>8</u>
Total	121	98

TABLE 34

Inside Winter Storage, Large by the Highway Marine Sales Outlets

<u>Length</u>	<u>Sail</u>	<u>Outboard</u>	<u>Inboard</u>	<u>Inboard/Outboard</u>	<u>Total</u>
Up to 16'	20	105			125
16-26'	16	92	16	71	195
26-40'					
40' and over					
Total	36	197	16	71	320

IDEAS AND SUGGESTIONS RECEIVED WHILE MAKING MARINA INTERVIEWS

Mr. Peter Horne and one of the writers, George Shaw, made all the marina interviews. While taking interviews and discussing marina business and problems in general, the interviewers heard the following ideas and suggestions expressed. In listing these no order of magnitude was used, but all things listed here were mentioned at least three or more times by different individuals being interviewed. They are listed here for one reason only: as food for thought for the marine dealers themselves.

1. Comments made that the Association attempt to increase membership. To have a closer rapport between "The Lakes Region" and the rest of the state. Hold meetings in different locations--stagger the meetings around the areas where marinas are located.
2. Heard many comments on marine trade workshop held in February of this year; all the remarks were in favor of the workshop, although several people would have liked different subjects discussed. This is normal. All who brought up the subject felt that now the ground was broken, let's not stop--let's plan more workshops!
3. It was suggested by some that perhaps the Association could have a central supply center in the Lake Winnepesaukee area for marinas to draw on for spare parts, etc.

It was also suggested that marinas attempt to work more closely together on types of equipment installed, i.e., marine heads (holding tanks), if the marina operators could agree to sell, install and service three or four good makes, and stock these

parts at one central location rather than selling and installing seven or eight different kinds with each dealer sending half way across the country or farther for replacement parts every time one is needed.

4. It has been mentioned that some sort of credit reference system be set up between marinas. Another way it was worded was establish a clearing house for bad customers, (noisy, bad credit, destructive drunks, etc.), so that they don't run from place to place and eventually cause grief for everyone.
5. We had many and varied comments regarding no overnight anchoring in Lake Winnepesaukee other than following the now prescribed rules and regulations. Comments ran the gauntlet from "an excellent ruling" to "the rule is no damn good," the latter driving some boat owners to sell their boats or to move to the ocean. Several did say that they felt the state should be urged to put in several well marked and defined anchorages in the lake, preferably off state or town parks or other public lands. This practice, it was felt, would allow those so inclined, and those not out of necessity tied to the "electrical umbilical cord," the opportunity to drop the hook and spend the night as cruising people have done for years.

FIGURE 2

LOCATIONS OF MARINAS ON LAKE WINNIPESAUKEE



LOCATIONS OF MARINAS ON LAKE SUNAPEE, NEWFOUND LAKE, AND LAKE OSS�PEE

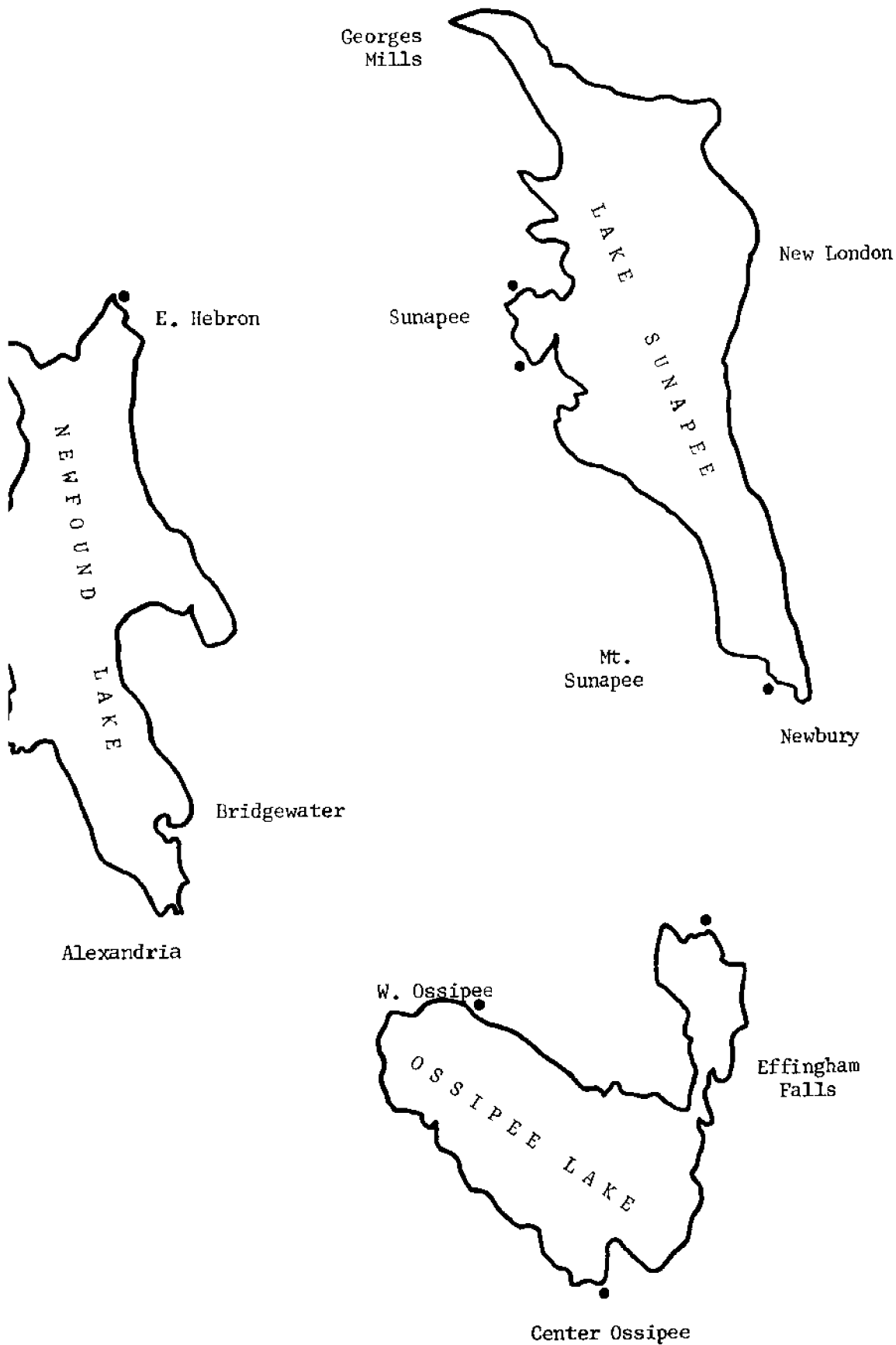


FIGURE 4

LOCATIONS OF MARINAS ON SQUAM LAKE AND LAKE WINNISQUAM

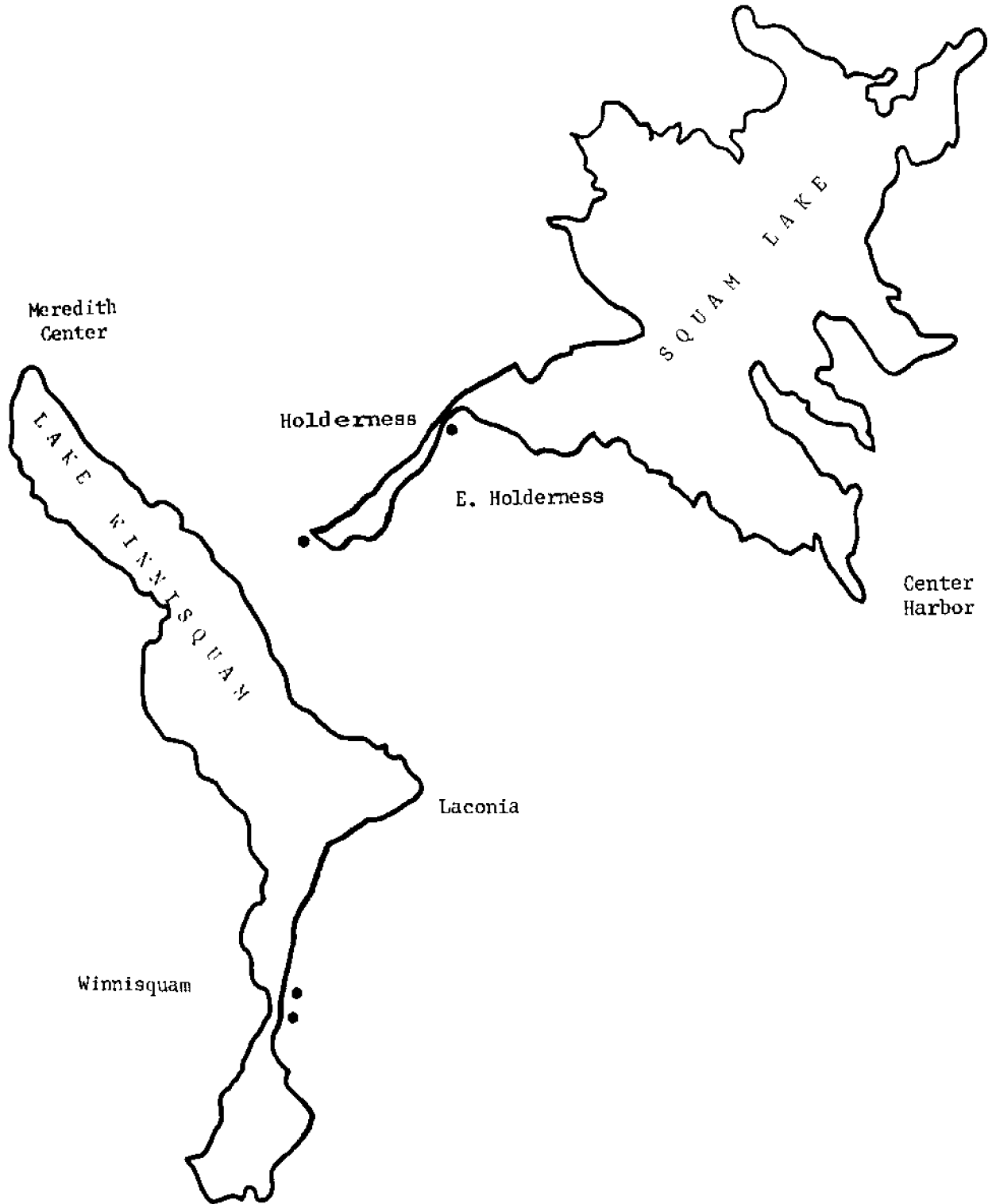
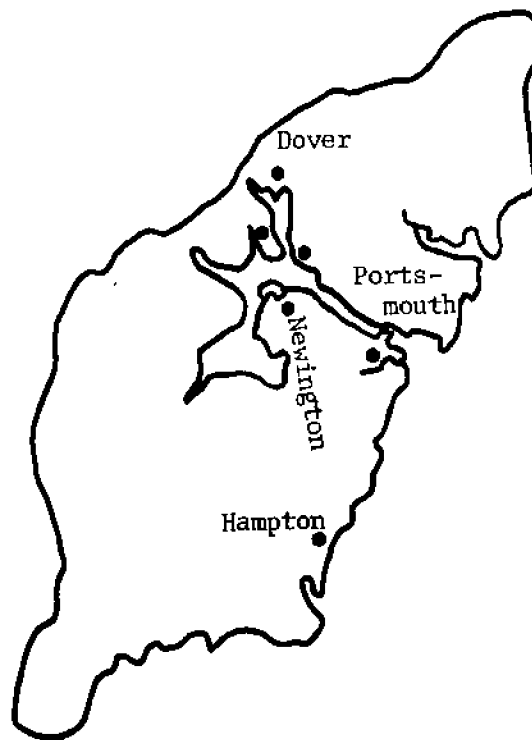


FIGURE 5

LOCATIONS OF MARINAS IN THE SEACOAST REGION



ECOLOGICAL CONCERNS

This report is concerned entirely with the business and physical characteristics of New Hampshire marinas and other major segments of the pleasure boat industry. The survey did not deal with local community planning or other political aspects of the marina industry, nor did it deal with environmental impacts of marinas and boat usage on the water and associated land areas. This latter is a subject of much concern to community leaders as well as to marina owners, but determination of ecological impacts requires detailed scientific investigation.

A recent study by the University of Rhode Island Graduate School of Oceanography titled Ecology of Small Boat Marinas examined the biological effects of a marina through comparison with a marsh. The abstract of the report is as follows:

In Wickford Harbor, Rhode Island, a yacht marina area and a salt marsh cove were considered as ecological systems and compared to evaluate biological populations and magnitudes of production and respiration. Volume and flushing characteristics of both areas were similar. Analyses were made in each cove on marsh grass production, suspended particulate matter, phytoplankton, nutrients, bacteria, dissolved organics, copper levels, fish and sediments. Biomass and metabolism measurements were made on the fouling communities present on floats and pilings in the marinas. Preliminary bioassays were performed with concentrations of outboard motor exhaust water on several species of estuarine organisms. Some additional comparative measurements were taken inside and outside other marinas located in Narragansett Bay.

No major differences were found in marsh grass production, concentrations of suspended particulate matter, nutrients, bacteria, dissolved organics, infauna, or sediment metabolism. Copper levels, while lower than toxic concentrations reported in the literature, were higher in the marina cove, ranging from 0.009 $\mu\text{g/g}$ in the water to 160 $\mu\text{g/g}$ in the fouling community. Fish species reached the same levels of diversity in both the marina and the marsh cove, but abundance was greater in the marsh cove due to the presence of dense juvenile menhaden schools.

The fouling communities of the marinas, which appeared to be a food source for juvenile mummichogs (*Fundulus heteroclitus*), exerted a significant oxygen demand on the marina cove. Diurnal curves of dissolved oxygen showed lower concentrations at the end of the night in marina areas than in adjacent waters. For this reason, and because preliminary bioassays indicated some toxicity due to exhaust waters, it is suggested that marina sites be well flushed with oxygenated tidal waters. The luxurious fouling growths which developed in the marina cove may serve as additional food sources to complement the detritus input from the salt marsh.

In most respects the marina cove and the marsh cove appeared to be not only similar, but also compatible ecological systems.

SOURCE: Ecology of Small Boat Marinas, Scott W. Nixon, Candace A. Oviatt, Sharon L. Northby, Marine Technical Report Series No. 5, University of Rhode Island, 1973.

APPENDIX

REGISTRATION FEES*

READ CAREFULLY

Circle Below Fee Enclosed

OUTBOARD MOTORS		INBOARD BOATS	
5 H.P. and under	\$4.00	18 ft. and under	6.00
5.1 H.P. to 13.9 H.P.	5.00	Over 18 ft. thru 26 ft.	9.00
14 H.P. and over	6.00	Over 26 ft.	11.00

Field Agent's Fee \$.50

Not Applicable to Office Transactions

*R.S.A. 370:5 as amended by
Chapter 482-E, Laws of 1969

The accompanying number plate has been assigned to the motor boat or outboard motor here-with described and the same is hereby registered under the laws of New Hampshire, in the name of the person appearing hereon.

Frederick N. Clarke, Jr.
Director of Motor Vehicles

NUMBER PLATE TO BE PLACED ON OUTSIDE OF BOAT AT STERN

REGULATIONS REQUIRE:

Life preservers for each person in the boat;

Fire extinguishers of an approved type;

Whistle;

Headway speed when operating within 150 Ft. at other boats, floats, docks, swimmers and the shore;

No more than two skiers may be towed at one time. An observer for each skier must be in the boat in addition to the operator.

Skiers to wear life belts, or jackets.

Date of Transfer

Transferred to

Address

Owner Signature

Field Agent's Fee \$.50. Not Applicable to Office Transactions

APPLICATION

1972

Plate Number

Do not write

Type or print in ink.			DESCRIPTION OF ENGINE OR MOTOR	
NAME			Serial Number	Hp.
MAILING ADDRESS			Make	Model
			DESCRIPTION OF BOAT	
			Make	Length Pt.
Summer Address in N.H.			Outboard <input type="checkbox"/>	Inboard/Outboard <input type="checkbox"/>
			Inboard <input type="checkbox"/>	Sailboat <input type="checkbox"/>
			Other: _____	
Agent No.	Date	Fee		

In what town is the boat kept on April 1 of this year? _____

Have you paid all taxes assessed against boats owned by you, to the date of this application? Yes No
 Yes No

Is your boat equipped with a marine toilet? Yes No
 Yes No

If so, is it constructed and equipped as provided by law and regulations? Yes No
 Yes No

Is this boat or motor to be used commercially?

I am familiar with laws and regulations governing the operation of boats and equipment required for power boats.

If a boat with temporary or permanent sleeping and toilet facilities (houseboat) and it will be moored at one location in New Hampshire, state where it will be moored? Otherwise, notification of places of mooring of houseboat to New Hampshire water supply and pollution control commission is required in accordance with the provisions of RSA 278-A.

Location _____

Owner's Signature _____

If Other Than Owner Give Title _____

This application is signed under the penalty of perjury, all cards must be properly filled out or they will be returned. Make payment to - State of New Hampshire, (MV) Concord, N.H. 03301

DO NOT MAIL CASH

DSMV26

THE STATE OF NEW HAMPSHIRE DEPARTMENT OF SAFETY DIVISION OF MOTOR VEHICLES CONCORD, N. H. 03301	Private Boat or Motor Registration Certificate	Plate Number
	1972	Do not write
Type or print in ink.		
NAME _____	DESCRIPTION OF ENGINE OR MOTOR	
MAILING ADDRESS _____	Serial Number _____	Hp. _____
_____	Make _____	Model _____
_____	DESCRIPTION OF BOAT	
Summer Address in N.H. _____	Make _____	Length _____ Ft.
_____	Outboard <input type="checkbox"/>	Inboard/Outboard <input type="checkbox"/>
_____	Inboard <input type="checkbox"/>	Sailboat <input type="checkbox"/>
_____	Other: _____	
Agent No. _____	Date _____	Fee _____
Valid only With Director's Signature Expires December 31, Following Date Issued		

A MESSAGE FROM THE GOVERNOR

The people of New Hampshire welcome you as a boat owner to enjoy the recreational boating facilities of our state. The Department of Safety maintains hundreds of navigational aids and waterways patrols for your safety. You should become familiar with our laws to avoid a mishap to your family or others using our waterways. Our waterways are one of our most important assets. Please help us keep them unpolluted.

Sincerely,

 Walter Peterson
 Governor

APP. NO. _____

STATE OF NEW HAMPSHIRE
DEPARTMENT OF SAFETY
DIVISION OF MOTOR VEHICLES
ROAD TOLL SECTION
CONCORD, N. H. 03301

RETAIL DEALER
ROAD TOLL REFUND APPLICATION

FOR OFFICE USE ONLY

TOTAL TOLL PAID \$ _____
AMOUNT OF REFUND _____
BY _____

THE STATEMENT ON THE REVERSE SIDE MUST BE COMPLETED BY THE APPLICANT'S SUPPLIER. ALL GALLONAGE FIGURES SHOULD BE CHECKED FOR ACCURACY.

NAME OF APPLICANT _____

STREET ADDRESS _____

CITY OR TOWN _____ NEW HAMPSHIRE

ALL APPLICATIONS FOR REFUNDS MUST BE MADE UNDER PENALTIES OF PERJURY AND SHALL BE MADE SEMI-ANNUAL WITHIN 90 DAYS AFTER JUNE 30TH AND DECEMBER 31ST RESPECTIVELY.

ALL APPLICATIONS MUST BE ACCOMPANIED BY A STATEMENT FROM THE DISTRIBUTOR, SUPPLIER OR WHOLESALER THE GROSS PURCHASES OF MOTOR FUEL MADE BY RETAIL DEALERS DURING THE SIX-MONTH PERIOD.
(ONLY STATEMENT PRESCRIBED AND FURNISHED TO SUPPLIER BY COMMISSIONER WILL BE ACCEPTED)

STATION(S)

OWNED _____ LEASED _____
(PLEASE CHECK)

CONSIGNED SALES - YES _____ NO _____
(PLEASE CHECK)

IF LEASED, NAME AND ADDRESS OF OWNER -

IF YES, CONSIGNOR'S NAME AND ADDRESS -

NO. OF PUMPS
REGULAR GAS _____
HiTEST GAS _____
DIESEL FUEL _____ (No Refund)

STORAGE
REGULAR GAS _____ GALLONS
HiTEST GAS _____ GALLONS
DIESEL FUEL _____ GALLONS

APPLICANT'S CLAIM

FROM _____ To _____ 19 _____
MONTH MONTH

GROSS PURCHASES (PER STATEMENT) _____ GALS.

TOLL (9¢ PER GAL.) _____ .09

TOLL PAID \$ _____

REFUND RATE (1%) _____ .01

AMOUNT OF REFUND \$ _____

SIGNATURE OF APPLICANT _____

SIGNED UNDER PENALTIES OF PERJURY

(CLAIM FORM ON THE REVERSE SIDE MUST BE COMPLETED BY THE APPLICANT)

STATEMENT

MOTOR FUEL SALES TO NEW HAMPSHIRE RETAIL DEALERS

THIS STATEMENT IS PREPARED FOR AND FURNISHED TO NEW HAMPSHIRE RETAIL DEALERS TO SUBSTANTIATE ROAD TOLL REFUND CLAIMS AS AUTHORIZED UNDER CHAPTER 265 19A OF THE MOTOR VEHICLE LAW.

RETAIL DEALER — SHALL INCLUDE ANY PERSON OR PERSONS OTHER THAN A LICENSED DISTRIBUTOR WHO ENGAGES PRIMARILY IN THE BUSINESS OF SELLING OR DISTRIBUTING MOTOR FUEL WITHIN THIS STATE AT THE RETAIL LEVEL, PROVIDED FURTHER THAT RETAIL DEALER SHALL NOT INCLUDE ANY PERSON OR PERSONS WHO RECEIVE MOTOR FUEL UPON WHICH THE ROAD TOLL HAS BEEN PAID BY A LICENSED DISTRIBUTOR FOR STORAGE OR SUBSEQUENT DISTRIBUTION AT THE WHOLESALE LEVEL OR SOLEY FOR STORAGE AND CONSUMPTION BY SUCH PERSON OR PERSONS.

SUPPLIER _____

ADDRESS _____
STREET CITY-TOWN STATE

DATE _____ 19 ____

RETAIL DEALER _____

ADDRESS _____
STREET CITY-TOWN STATE

THE UNDERSIGNED STATES THAT THE FOLLOWING MOTOR FUEL GALLONAGE WAS SOLD TO THE ABOVE FOR THE PERIOD INDICATED.

FROM _____	TO _____	19 ____
REGULAR GASOLINE _____		GALLONS
Hi TEST GASOLINE _____		GALLONS
TOTAL _____		GALLONS

Signed _____ TITLE

For _____
(SUPPLIER)

SIGNED UNDER PENALTY OF PERJURY

**STATE OF NEW HAMPSHIRE
DEPARTMENT OF SAFETY
DIVISION OF MOTOR VEHICLES
ROAD TOLL SECTION
CONCORD, N. H. 03301**

WATERCRAFT REPORT

REPORT OF MOTOR FUEL SOLD AND DELIVERED
DIRECT TO FUEL TANKS AND SUPPLEMENTARY FUEL TANKS

SOLD BY _____

ADDRESS _____

MONTH OF _____ 19 _____

REPORTS MUST BE FILED IN THE OFFICE OF THE ROAD TOLL
SECTION OF THE DIVISION OF MOTOR VEHICLES MONTHLY ON
OR BEFORE THE LAST DAY OF EACH SUCCEEDING MONTH.

FOR OFFICE USE ONLY	GALS.
SOLD	
REFUNDED	
UNREFUNDED BALANCE	
DUE SAFETY DIVISION	\$
BY _____	

GALLONS

1. INVENTORY (TANK) ON THE FIRST OF THE MONTH.		XXXX
2. RECEIPTS (LIST ONLY DELIVERIES TO WHARF TANKS AND PUMPS)		XXXX
3. TOTAL (LINE 1 PLUS LINE 2)	XXXX	
4. SOLD DIRECTLY TO BOAT TANKS AND SUPPLEMENTARY FUEL TANKS.		XXXX
5. USED IN THE PROPULSION OF WATERCRAFT. (ALL CLAIMS FOR REFUND MUST BE FILED USING FORM R-1)		XXXX
6. USED OR SOLD FOR PURPOSES OTHER THAN THE PROPULSION OF WATERCRAFT. EXPLANATION _____		XXXX
7. TOTAL (LINES 4, 5 & 6)	XXXX	
8. INVENTORY (BOOK) ON THE LAST OF THE MONTH. (LINE 3 LESS LINE 7)	XXXX	
9. INVENTORY (TANK) ON THE LAST OF THE MONTH.	XXXX	
10. STOCK GAIN OR LOSS (DIFFERENCE LINES 8 & 9)	XXXX	

THE UNDERSIGNED STATES THAT, TO THE BEST OF HIS KNOWLEDGE, ALL INFORMATION CONTAINED IN THIS REPORT IS TRUE IN EVERY PARTICULAR.

SIGNED BY _____ TITLE _____

FOR _____

PENALTY — ANY PERSON WHO SHALL FAIL TO MAKE A REPORT SO REQUIRED SHALL BE FINED NOT MORE THAN ONE HUNDRED DOLLARS. (SOURCE 1955. 2)

STATE OF NEW HAMPSHIRE
 DEPARTMENT OF SAFETY
 DIVISION OF MOTOR VEHICLES
 ROAD TOLL SECTION
 22 BRIDGE STREET
 CONCORD, N. H. 03301

FOR OFFICE USE ONLY

ROAD TOLL REFUND APPLICATION

THIS IS TO CERTIFY THAT

CLAIM NUMBER	
CLASS, NO.	NO. MOS.
APPROVED	DISALLOWED
_____ GAL S	_____ GAL S
\$ _____	\$ _____
BY _____	REASON NO. _____
DATE _____	

 (NAME OF APPLICANT)

 (STREET)

 (CITY - TOWN)

 (STATE)

HAS PURCHASED AND USED FOR THE PURPOSE HEREIN STATED MOTOR FUEL ON WHICH ROAD TOLL HAS BEEN PAID BY THE PURCHASER. ALL EQUIPMENT USING MOTOR FUEL MUST BE LISTED ON THE REVERSE SIDE AND MOTOR FUEL CONSUMED IN SAME MUST BE ACCOUNTED FOR.

ORIGINAL INVOICES OF ALL PURCHASES BEARING NAME & ADDRESS OF BOTH SUPPLIER & APPLICANT TOGETHER WITH EVIDENCE OF PAYMENT MUST BE ATTACHED. **EVIDENCE OF PAYMENT** - EACH INVOICE MUST BE RECEIPTED BY SUPPLIER AS BEING PAID OR IF PAYMENT IS MADE BY CHECK, DATE OF PAYMENT TOGETHER WITH CHECK NO. MUST APPEAR ON INVOICE. INVOICE MADE OUT TO CASH **NOT ACCEPTIBLE** - **No INVOICE** CAN BE RETURNED. IF THERE IS ANY EVIDENCE OF ERASURES, OR CHANGES IN EITHER DATES OR AMOUNTS SHOWN ON INVOICES OR EVIDENCE OF PAYMENT OF ROAD TOLL, APPLICATION WILL BE DISALLOWED IN ITS PORTION.

APPLICANT'S CLAIM

1. TOTAL PURCHASES, AS PER ATTACHED INVOICES	GALS.
2. TOTAL USED ON PUBLIC HIGHWAY (COL. 5 - LINE 17 - REVERSE SIDE)	"
3. TOTAL USED OFF PUBLIC HIGHWAY (COL. 6 - LINE 17 - REVERSE SIDE)	"
* 4. TOTAL ON WHICH CLAIM IS MADE. (LINE 3)	"
5. AMOUNT OF REFUND @ 9 CENTS PER GAL. \$ _____	

6. TYPE OF OPERATION _____

7. WHERE USED _____

CITY - TOWN

STATE

8. COLUMNS 1 THRU 6 ON THE REVERSE SIDE MUST BE COMPLETED BY ALL APPLICANTS.

9. STOCK RECORD - REVERSE SIDE - MUST BE COMPLETED IF APPLICANT HAS STORAGE TANKS OR USES DRUMS.

 SIGNATURE OF APPLICANT

SIGNED UNDER PENALTIES OF PERJURY

FUEL Used For Period Of _____ THRU _____ MONTH _____ 19 _____

STOCK RECORD MUST BE COMPLETED IF APPLICANT HAS STORAGE TANKS OR PURCHASES IN DRUMS.

COL. 1	COL. 2	COL. 3	COL. 4	COL. 5	COL. 6
TYPE OF EQUIPMENT **	MAKE	YEAR	REG. NO. *** (IF ANY)	GALS. USED ON HIGHWAY	GALS. USED OFF HIGHWAY
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
			17 TOTALS		
			18 TRANSFER TO CLAIM	LINE 2	LINE 3
			19 TOTAL USED COL. 5 PLUS 6	MUST EQUAL LINE 4 STOCK RECORD	

STOCK RECORD		GALLONS
1.	ACTUAL INVENTORY FIRST DAY OF PERIOD.	
2.	TOTAL PURCHASES. (AS PER ATTACHED INVOICES)	
3.	TOTAL GALLONS TO BE ACCOUNTED FOR. (LINE 1 PLUS LINE 2)	
4.	TOTAL GALLONS USED (AS SHOWN ON LINE 19 - COLS. 5 & 6)	
5.	TOTAL GALLONS SOLD	
6.	BOOK INVENTORY LAST DAY OF PERIOD. (LINE 3 LESS LINES 4 & 5)	
7.	ACTUAL INVENTORY LAST DAY OF PERIOD.	
8.	STOCK LOSS OR GAIN. (DIFFERENCE LINES 6 & 7)	
9.	TOTAL GALS. ACCOUNTED FOR (TOTAL LINES 4, 5, 7 & 8 - MUST EQUAL LINE 3)	

DO NOT WRITE IN THIS SPACE

APPLICANTS MAKING PURCHASES IN CANS (2.5, 10 GALS.) OR BY DIRECT RECEIPT INTO FUEL TANKS ARE NOT REQUIRED TO COMPLETE STOCK RECORD BUT MUST COMPLETE COLS. 5 & 6.

NUMBER OF MOTOR VEHICLES OWNED AND REGISTERED IN NEW HAMPSHIRE _____
 MOTOR FUEL MUST BE ACTUALLY USED AND REFUND APPLIED FOR WITHIN SIX (6) MONTHS AFTER DATE OF PURCHASE OR INVOICE OF THE MOTOR FUEL WITH RESPECT TO WHICH REFUND IS CLAIMED.