



MIAA AUSTRALIAN MARINAS VALUE STUDY: SURVEY QUESTIONS FOR PARTICIPATING MARINAS

This research project is being conducted by Dr Ed Mahoney, professor and industry extension specialist at Michigan State University and a co director of the Recreation Marine Research Centre (RMRC). As a result of Dr Mahoney's presentation at the Australian Marina Industries 2007 Conference on the methodology for measuring the economic and value add of marinas, he has been commissioned to undertake this research in Australia. The outputs of this study will be most valuable in quantifying the value of the Australian marina industry. The study will be launched at the Marinas 2009 Conference.

This research project is being sponsored through a Marina industries Association of Australia partnership with QLD, NSW and Vic. governments. It is a three stage project. Stage 1 of the research was to test and refine the survey involving 7 participating marinas. This Stage 2 involves the survey of some 20 MIAA marina members. The data will then be analyzed by Dr Ed Mahoney; any final survey modifications made and the aggregated data from an estimated 26 marinas will be presented as part of the study launch at the Marinas 2009 Conference 24- 27 May. Post the Conference, Phase 3 will involve wider industry data entry via a dedicated web site with the value of individual marina activity (provided confidentially) and the wider industry value provided to support industry development.

Your support in providing as much data as possible is important to achieve the study outcomes; however it is recognised you may not have data for all relevant questions. The questions require you to provide specific financial and other data relating to your business and to a lesser extent data related to tenanted/leased businesses at your marina. In all instances the data relates to the 1 July 2007 to 30 June 2008 period unless otherwise specified. The right hand column is for you to list any issues/problems/suggestions relating to that particular question. Please return the completed survey to Colin Bransgrove at MIAA by March 30. . The data will then be analyzed by Dr Ed Mahoney and the aggregated data from the 20+ marinas used as part of the study launch at Marinas 2009. Thank you for your cooperation.

Contact Colin Bransgrove; MIAA Executive Officer, P 02 9439 5806, colin@marinas.net.au if you have any queries about the questions.

CONFIDENTIALITY AGREEMENT: Individual marina data provided will be kept strictly confidential and only sighted by the Executive Officer of MIAA and the researcher Dr Ed Mahoney. Only grouped and aggregated data of the participating marinas will be presented as part of the study outcomes.

Signed _____ Marina Name _____ Post Code _____ Date _____

Signed _____ MIAA _____ Date _____

Type of Marina:

Please specify what best describes your marina by ticking the appropriate box. (see full marina definitions at the end of this survey document - P 6).

Yacht Club Marina Tourism/Accommodation Marina Retail Marina Traditional Marina Services and Repair Marina

Scope of Marina Operations/Activities

Please specify the parameters of your marina operations by circling Y (yes), N (no) or N/A (not applicable) for those goods/services provided directly by the marina or indirectly by marina tenants etc. Comments in the right column are appreciated to assist with improving the questionnaire.

Q	Marina Operated			Tenant Operated			Comment to help refine survey design
1.	Wet berths	Y/N	N/A	Wet berths	Y/N	N/A	
2.	Moorings	Y/N	N/A				
3.	Dry Stack Storage	Y/N	N/A	Dry Stack Storage	Y/N	N/A	
4.	Hard Stand /Trailers	Y/N	N/A	Hard Stand /Trailers	Y/N	N/A	
5.	Slipping/Haul-out/Lift-out	Y/N	N/A	Slipping/Haul-out/Lift-out	Y/N	N/A	
6.	Fuel	Y/N	N/A	Fuel	Y/N	N/A	
7.	Marina Utilities ¹	Y/N	N/A	Marina Utilities	Y/N	N/A	
8.	Marina Services ²	Y/N	N/A	Marina Services	Y/N	N/A	
9.	Boat Repair Services	Y/N	N/A	Boat Repair Services	Y/N	N/A	
10.	Charter & Hire Boats	Y/N	N/A	Charter & Hire Boats	Y/N	N/A	
11.	New/Used Boat Sales	Y/N	N/A	New & Used Boat Sales	Y/N	N/A	

¹ Marina Utilities e.g. power, water, internet, phone, cable/sat

² Marina Services e.g. pump-out, laundry etc

Q	Marina Operated			Tenant Operated			Comment to help refine survey design
12.	Restaurant/F&B	Y/N	N/A	Restaurant/F&B	Y/N	N/A	
13.	Chandlery & Other Retail	Y/N	N/A	Chandlery & Other Retail	Y/N	N/A	
14.	Membership	Y/N	N/A	Membership	Y/N	N/A	
15.	Gaming	Y/N	N/A	Gaming	Y/N	N/A	
16.	Other*	Y/N	N/A	Other*	Y/N	N/A	

*Other please specify_____

Capital Items

List \$ expenditure for 2007/08 year on capital equipment, infrastructure, machinery etc. (excluding GST)

Q	Capital Expenditures	Marina Operated (\$)	Tenant Operated(\$)	Comment to help refine survey design
17.	Total Capital Expenditures			

Marina Sales, Revenues and Cost of Sales (excluding GST)

Now please provide information on the different sources of sales, revenues and costs to the marina. Provide answers to the following questions with specific \$ amounts (exclusive of GST). Please provide figures from the 1 July 2007 to 30 June 2008 period. If the question is not applicable write N/A - if you cannot answer it put a line through the box. Shaded boxes in the survey do not require a response.

Q	Source of Business Activities	Marina Operated		Tenant Operated		Comment to assist refine survey design
		Sales & Revenues \$	Cost of Sales \$	Sales & Revenues \$	Cost of Sales \$	
18.	Wet Berths					
19.	Moorings					

Q	Source of Business Activities	Marina Operated		Tenant Operated		Comment to assist refine survey design
20.	Dry Stack Storage					
21.	Hard Stand/Trailers					
22.	Slipping/Haul-out/Lift-out					
23.	Fuel					
24.	Marina Utilities (see Q7)					
25.	Marina Services (see Q 8)					
26.	Boat Repair Services					
27.	Charter & Hire Boats					
28.	New & Used Boat Sales					
29.	Restaurant/F&B					
30.	Chandlery & Other Retail Stores					
31.	Membership Fees					
32.	Gaming Revenues					
33.	Other					
34.	Rents Received from Tenants					
35.	TOTALS (Office Use Only)					

Federal State and Local Charges and Taxes (Excl Income Tax and Payroll Tax)

For the following questions please write in the \$ amount for the taxes as specified. This again applies for the period 1 July 2007 to 30 June 2008. If not applicable write N/A. If unknown put a line through the box.

Q	Federal State & Local Charges & Taxes (Excl Income Tax & Payroll Tax)	Marina Operated \$	Tenant Operated \$	Comment to assist refine survey design
36.	Lease Rents Paid			
37.	State Land Tax			
38.	State Tax on Gaming Revenues			
39.	Local Council Rates			
40.	Other Taxes*			
41.	Net Goods & Services Tax (GST) Paid			
42.	Total Taxes Generated for Year (sum of Q36 to Q 41) excluding Wage & Payroll Taxes (Office use only)			

*Other Taxes - describe _____

Marina employment and salaries/wages per annum

For the following questions please specify employment numbers and \$ amounts as specified. With respect to your answers to questions for tenants please provide your best estimates or put a line through the box if you cannot provide an estimate. Write N/A in the box(s) if not applicable. Please provide data for

the 1 July 2007 to 30 June 2008 period.

Q		Marina Operated	Tenant Operated	Comment to assist refine survey design
43.	No. of Employees Permanent			
44.	No. of Employees Casual			

Q		Marina Operated	Tenant Operated	Comment to assist refine survey design
45.	Total Gross Annual Payroll (incl. bonuses, incentives)	\$	\$	
46.	Total Annual Superannuation Paid	\$	\$	
47.	Total Annual Allowances (car, travel etc.)	\$	\$	
48.	Total Government Tax Component of Wages Bill (PAYG Tax)	\$	\$	
49.	Other Government Taxes on Labour (Payroll Tax, Fringe Benefits Tax)	\$	\$	

Wet berths

For the following questions please specify berth numbers and for Q. 55 a % figure is required. If not known put a line through the box or if not applicable write N/A in the box. Please provide data for the 1 July 2007 to 30 June 2008 period.

Q	Berth size - (meters)	0-10	10.1 -14	14.1- 16	16.1 - 20	20.1 +	Total	Comment to assist refine survey design
50.	Total No. Berths							
51.	No. Berths Rented							
52.	No. Berths Leased 2 yrs +							
53.	No. Berths Strata							
54.	No. Moorings							
55.	Total % occupancy							

Dry Stack Boat Storage

For Q's 56 and 58 please specify the number and for Q's 57 and 59 a %. If not known put a line through the box or if not applicable write N/A in the box. Please provide data for the 1 July 2007 to 30 June 2008 period.

Q	Boat size - (meters)	0-4	4.1 - 6	6.1 - 8	8.1 - 10	10.1 - 12	12.1 - 14	14+	Total	Comment to assist refine survey design
56.	Total No. Boat spaces									
57.	Total % occupancy									

Hard Stand and Trailer Storage

Q	Boat size - (meters)	0-10	10.1-14	14.1-16	16.1 - 20	20.1 +	Total	Comment to assist refine survey design
58.	Total No. Boat Spaces							
59.	Total % occupancy							

Thank you for completing this questionnaire. If you have any questions while filling it in please contact Colin Bransgrove. You may also like to raise specific matters regarding the questionnaire and application of the data for your benefit with Dr Ed Mahoney at the Marina 2009 Conference 24 - 27 May. . Please send the completed questionnaire to Colin Bransgrove at MIAA: PO Box 1204, Crows Nest NSW 1585 Australia to be received no latter than Tuesday 31 March.

MARINA DEFINITIONS

Yacht Club Marina

Club that operates in a traditional committee/membership manner and contains marina berths/mooring in excess of 50. Club house with amenities, food and beverage. May include poker machines and have repair facilities.

Examples: SA - Royal SA Yacht Squadron. NSW - Royal Motor Yacht Club, Point Piper. WA - Royal Perth Yacht Club. Victoria - Sandringham Yacht Club. QLD - Queensland Cruising Yacht Club.

Tourism/Accommodation Marina

Marina has a minimum number of 50 berths/moorings with short term accommodation adjoining with food and beverage. May include retail.

Examples: East Coast Australia - Versace Hotel Marina; Anchorage Marina; Cairns Marlin Marina.

Retail Marina

Marina has a minimum of 50 berths/moorings/drystack with associated retail outlets exceeding 2,000 sqm. May include haul out repair facilities.

Examples: East Coast Australia - Marina Mirage Surfers Paradise; Runaway Bay Marina; d'Albora Marinas Nelson Bay; d'Albora Marinas, The Spit.

Traditional Marina

Marina with a minimum of 50 berths/moorings/drystack with a maximum 2,000 sqm of retail/commercial and some haul out/service facility.

Examples: East Coast Australia: Savage Wharf Marina Melbourne; St Kilda Marina; Meridien Marinas Abel Point, Airlie Beach; Holmeport Marina, Pittwater; Ferguson's Boatshed, The Spit; Spinnaker Sound Marina, Sandstone Point.

Service and Repair Marina

Marina with some berthing plus commercial/retail but primarily a service/haul out facility. A minimum of 50 berths/moorings/drystack. Minimum haul facility and hard stand to accommodate a minimum 300m of vessel with associated services.

Examples: QLD - Gold Coast City Marina; Gold Coast City Marine Centre; Mackay City Marina; Horizon Shores; Rivergate Marina Brisbane.

Note: we are not limited to the marinas listed above.