

Marine Science and Technology Industry Survey

This survey is being administered by the University of Massachusetts Donahue Institute on behalf of the University and the Marine Ocean Technology Network (MOTN). The confidentiality of your responses is **guaranteed**. No one outside of the UMass research team working on this study will ever see these survey data. To ensure total confidentiality, survey results will be presented as aggregate findings only.

*Please complete and return this survey as soon as possible. **We will accept surveys postmarked up to October 22.** For information, contact Steve Ellis at sellis@donahue.umassp.edu or (413) 587-2405.*

Company Profile

1. Does your company provide a marine-related product or service? yes no
- If YES, continue. If NO, your survey is complete.
 - Please indicate company name and return survey in the enclosed envelope. We will remove your name from our mailing list. _____

2. In which New England state is your company located?
- (Enter two-letter state code. If multiple sites; please identify your primary NE location)*

3. Do you work for a marine-focused division of a larger company? yes no
- If YES, please answer all survey questions for your marine division only.
 - If NO, please answer all survey questions for your entire company.

4. For how many years has your company/division focused on the marine market?

5. What is the total employment of your company (or marine-focused division)?

(Please indicate the total number of people you employ, regardless of full or part time status)

| | <i>In New England</i> | <i>In other locations</i> |
|----------------------------------|--|--|
| Two years ago | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |
| In the current year | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |
| Two years from now (anticipated) | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |

6. In the current year, approximately what percentage of your company/division's revenue will be from sales of marine-related products or services? %

7. Please estimate your company's annual revenue from marine-related products and services at each of the following times.

| | Total Revenue | Export Revenue |
|----------------------------------|---------------|----------------|
| Two years ago | \$ _____ | \$ _____ |
| In the current year | \$ _____ | \$ _____ |
| Two years from now (anticipated) | \$ _____ | \$ _____ |

Market Information

8. Please briefly describe your company/division's core technology or service.

9. In which of the following marine-related products or services does your company specialize?
(Please choose all that apply)

| | |
|---|---|
| <input type="checkbox"/> Marine science equipment | <input type="checkbox"/> Underwater vehicles |
| <input type="checkbox"/> Defense-related marine equipment | <input type="checkbox"/> Shipbuilding / design |
| <input type="checkbox"/> Communications equipment | <input type="checkbox"/> Ocean/environmental monitoring and surveying |
| <input type="checkbox"/> Navigation equipment | <input type="checkbox"/> Offshore / Coastal engineering |
| <input type="checkbox"/> Underwater photography/imaging | <input type="checkbox"/> Offshore construction |
| <input type="checkbox"/> Marine education | <input type="checkbox"/> Marine-specific materials |
| <input type="checkbox"/> Oceanography | <input type="checkbox"/> Computer modeling |
| <input type="checkbox"/> Consulting (specify) _____ | |
| <input type="checkbox"/> Other (specify) _____ | |

10. Which of the following niche markets is your company serving at present, and which do you expect to be growth areas for your company? (Please choose all that apply for each column)

| <i>Currently Serve</i> | <i>Expected Growth</i> |
|--|--------------------------|
| <input type="checkbox"/> Defense | <input type="checkbox"/> |
| <input type="checkbox"/> Homeland security | <input type="checkbox"/> |
| <input type="checkbox"/> Oceanographic | <input type="checkbox"/> |
| <input type="checkbox"/> Wind/Tidal energy | <input type="checkbox"/> |
| <input type="checkbox"/> Fisheries | <input type="checkbox"/> |
| <input type="checkbox"/> Atmospheric/environmental | <input type="checkbox"/> |
| <input type="checkbox"/> Offshore oil and gas | <input type="checkbox"/> |
| <input type="checkbox"/> Offshore communications | <input type="checkbox"/> |
| <input type="checkbox"/> Transportation | <input type="checkbox"/> |
| <input type="checkbox"/> Other _____ | <input type="checkbox"/> |

11. Of how much concern, if any, is each of the following obstacles to commercialization and business development of your marine products, services, or activities?

| | Great concern | Moderate concern | Little or no concern | Don't Know |
|--|-----------------------|-----------------------|-----------------------|-----------------------|
| Access to capital | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Product cost | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Lack of sites to demonstrate/test product | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Lack of labor with required skills/expertise | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| State regulations and permitting | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Federal regulations and permitting | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Export restrictions to foreign markets | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Foreign business regulations and practices | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Other _____ | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Business Relationships

12. Please indicate whether, and in what ways, your company collaborates with the following types of institutions. (You may choose all that apply)

| | No Collaboration | Yes, on Research & Development | Yes, on Testing and/or Demonstration | Yes, on other activities* | Don't Know |
|-------------------------------------|-----------------------|--------------------------------|--------------------------------------|---------------------------|-----------------------|
| Oceanographic research institutions | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Colleges/Universities | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Government agencies / departments | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Marine technology firms | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Other firms | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Other _____ | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

* If applicable, please briefly describe "other activities".

13. For which of the following products or services does your company rely upon suppliers within New England? In other locations? (Please choose all that apply)

| | New England Suppliers | Suppliers in Other Locations |
|------------------------------|-----------------------|------------------------------|
| Raw materials | <input type="radio"/> | <input type="radio"/> |
| Machining | <input type="radio"/> | <input type="radio"/> |
| Marine components & supplies | <input type="radio"/> | <input type="radio"/> |
| Electronics and sensors | <input type="radio"/> | <input type="radio"/> |
| Telecommunications/imaging | <input type="radio"/> | <input type="radio"/> |
| Software development | <input type="radio"/> | <input type="radio"/> |
| Other _____ | <input type="radio"/> | <input type="radio"/> |

Workforce

14. Approximately what percent of your New England employees fit the following descriptions ***and*** which of these have you had difficulty recruiting in the past year?
(Total should equal 100%. Please categorize staff in terms of their primary responsibility.)

| <i>Workforce Composition</i> | <i>Recent Difficulty Recruiting?</i> | |
|--------------------------------------|--------------------------------------|--------------------------|
| ____ % Scientists | <input type="radio"/> yes | <input type="radio"/> no |
| ____ % Engineers | <input type="radio"/> yes | <input type="radio"/> no |
| ____ % Technicians | <input type="radio"/> yes | <input type="radio"/> no |
| ____ % Management and administration | <input type="radio"/> yes | <input type="radio"/> no |
| ____ % Production | <input type="radio"/> yes | <input type="radio"/> no |
| ____ % Sales and marketing | <input type="radio"/> yes | <input type="radio"/> no |
| ____ % Other _____ | <input type="radio"/> yes | <input type="radio"/> no |

15. What factors, if any, make recruiting difficult for your company?

Business Environment

16. To what extent is each of the following aspects of your New England business location an advantage or disadvantage to your company, as compared to other U.S. locations?

| | Significant advantage | Modest advantage | Neutral | Modest disadvantage | Significant disadvantage | Don't know |
|--|--------------------------|-----------------------|-----------------------|------------------------|-----------------------------|-----------------------|
| <i>Business and Industry Factors</i> | | | | | | |
| Access to capital | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Access to research institutions | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Access to labor w/ technical skills | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Access to labor for factory floor | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Proximity to markets | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Proximity to suppliers | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Proximity to others in your industry | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Proximity to testing facilities and sites | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Proximity to deep water shelf | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Overall cost of doing business | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <i>Infrastructure Factors</i> | | | | | | |
| High speed data transmission(broadband) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Physical infrastructure (roads, ports, etc.) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| State regulatory policy | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| <i>Quality of Life Factors</i> | | | | | | |
| Cost of housing | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Quality of life | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

17. Please share any comments you may have regarding the relative advantages or disadvantages of your New England business location.

Potential Business Assistance

18. How beneficial would each of the following types of assistance be to your company?

| | | Highly beneficial | Somewhat beneficial | Not beneficial | Don't Know |
|---|--|-----------------------|-----------------------|-----------------------|-----------------------|
| A | Entrepreneur mentoring for start up companies | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| B | Seminars and workshops on commercialization, business development and management | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| C | Market research studies for new products | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| D | Grants to support "proof of concept" research | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| E | A center for product development, testing & demonstration | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| F | A forum to introduce commercializable technologies to potential investors and corporate collaborators | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| G | Assistance commercializing SBIR Phase II projects | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| H | A forum for strategic alliances to secure funds for large-scale research, development and demonstration projects | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I | Office/incubator space with shared facilities and tech support | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| J | Industry-targeted job recruitment events or services | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

In rank order, which three of these types of assistance would be most beneficial?

(Enter letter code A-J)

#1 #2 #3

19. Please offer any other recommendations you may have to support the development of marine-focused technology companies in New England.

20. What is the name of your company? (Optional) _____

(Your company name and responses are entirely confidential. By providing your company name, you will avoid receiving unnecessary follow-up messages encouraging your response to this survey.)

In the future, University or MOTN officials may convene industry members to discuss opportunities to advance our shared interests. If there is someone within your organization whom we should contact to participate, please provide that person's name and contact information:

Name _____ Phone _____

Email _____

If envelope is lost, return to: MSTs Study, UMass Donahue Institute, 100 Venture Way, Suite 5, Hadley MA 01035