5. Queensland Charter Industry Profiles

The following analyses are undertaken for all charter businesses and all owner-operators throughout Queensland. Where appropriate, comparisons across TRCs are also presented.

BUSINESS PROFILES

Number of Charter Businesses

There were 287 individual license holders identified in the Queensland Fisheries Service database of charter operators with a license to fish (Table 3.1). Our survey estimated that there was 8.6% latency in the database, which consisted of all fishers who were either deceased, had reported they were no longer in business or had retired. Therefore, within the past 12 months there were 257 active tourism charter license holders in Queensland.

Table 5.1 and Figure 5.1 show the estimated count and percentage distribution of charter businesses within the TRCs. The Cairns TRC had the highest percent of charter businesses (15.6%). The southern TRCs including Brisbane , Southport and Mooloolaba contain 29.2% of the charter businesses in Queensland. Gladstone (10.9%), Townsville (7.8%), and Port Douglas (5.8%) are also relatively important centres for tourism charter activity.

TRCs that are directly adjacent to the Great Barrier Reef Marine Park (TRCs from Cooktown to Gladstone) include 52.2% of charter businesses in Queensland (Table 5.1).

Table 5.1 Estimated Number of Charter Businesses by TRC

TRC	Estimated Count	Percent businesses
Karumba	8	3.1
Weipa	8	3.1
Thursday Island	6	2.3
Cooktown	6	2.3
Port Douglas	15	5.8
Cairns	40	15.6
Innisfail	1	0.4
Lucinda	1	0.4
Townsville	20	7.8
Airlie Beach	8	3.1
Mackay	11	4.3
Yeppoon	4	1.6
Gladstone	28	10.9
Bundaberg	5	1.9
Hervey Bay	17	6.6
Maryborough	1	0.4
Tin Can Bay	3	1.2
Mooloolaba	20	7.8
Brisbane	24	9.3
Southport	31	12.1
TOTAL	257	100.0

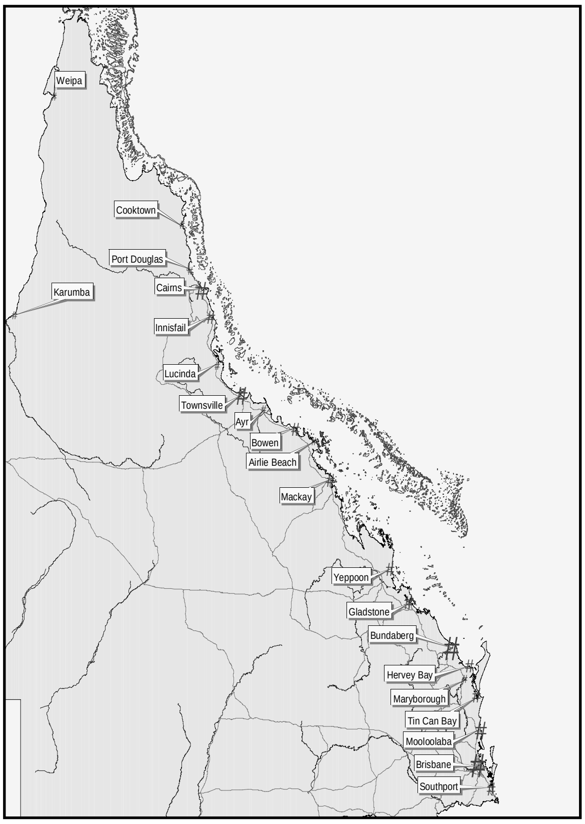

Figure 5.1 Location of Charter Businesses within TRCs

Fishing Activity and Type

Table 5.2 shows the type of fishing activity undertaken within the last year by charter businesses in Queensland. Fishing trips were chartered as day trips, overnight trips or extended trips. Reef fishing was the most popular fishing type on day trips (47.5%), overnight trips (66.0%) and extended trips (51.2%). Game fishing and estuary fishing were also main fishing activities on fishing charters.

Table 5.2 Type of Fishing Activity (during the last 12 months)

	Day trips	Overnight trips	Ext. trips
		Mean % of time	
Reef (bottom fishing)	47.5	66.0	51.2
Game (pelagic)	18.8	20.3	31.1
Estuary	26.8	11.6	12.5
Crabbing	0.5	0.2	0.5
Other	6.4	2.0	4.6
TOTAL	100.0	100.0	100.0

Source: CRC Reef (2000).

Table 5.3 shows the number of days chartered over the previous year for each TRC, and the percentage of trips that were chartered as a fishing charter (on day trips, overnight trips and extended trips).

The TRCs from which there were the most days chartered were Cairns (5,340 days), Southport (3,298), Gladstone (2,993 days) and Hervey Bay (2,098).

The TRCs from which most fishing-only charters occurred as a percentage of total charters were Karumba (98.8%), Weipa (98.8%), Townsville (85.7%), Hervey Bay (83.4%) and Mooloolaba (81.6%).

The TRCs from which there were the most days spent fishing were Cairns (3,748 days), Southport (2,420), Gladstone (2,014 days), and Hervey Bay (1,749).

Table 5.3 Number of Charter Days and Fishing Charter Days for each TRC

TRC	Days Chartered	Percent Fishing-only	Days Fishing
Karumba	573	98.8	566
Weipa	439	98.8	433
Thursday Island	720	64.5	464
Cooktown	443	72.7	322
Port Douglas	1,722	20.2	347
Cairns	5,340	70.2	3,748
Townsville	1,692	85.7	1,450
Airlie Beach	1,027	69.0	708
Mackay	1,751	39.4	689
Gladstone	2,993	67.3	2,014
Hervey Bay	2,098	83.4	1,749
Mooloolaba	1,312	81.6	1,070
Brisbane	1,365	66.0	900
Southport	3,298	73.4	2,420

Table 5.4 shows the type of activities undertaken on charters in addition to fishing. Fishing was the main activity on day trips (52.9%), overnight trips (51.2%) and extended trips (51.2%). The other main activities were diving/snorkeling and cruising/sightseeing.

Table 5.4 Activities on Charters where Fishing was not the only Activity

Type	QLD
Day Trips	
% time spent fishing	52.9
% time spent diving/snorkeling	13.1
% time spent cruising/sightseeing	17.5
% time spent sailing	0.4
% time spent whale & dolphin watching	4.2
% time spent doing other activities	11.9
Overnight Trips	
% time spent fishing	51.2
% time spent diving/snorkeling	22.9
% time spent cruising/sightseeing	15.9
% time spent sailing	0.0
% time spent whale & dolphin watching	0.0
% time spent doing other activities	10.0
Extended Trips	
% time spent fishing	51.2
% time spent diving/snorkeling	31.1
% time spent cruising/sightseeing	12.5
% time spent sailing	0.6
% time spent whale & dolphin watching	0.0
% time spent doing other activities	4.6

Table 5.5 shows the frequency of fishing activity for all charter fishing businesses in Queensland. February (6.2%) and March (8.8%) were the quietest months of the year, with the peak season being between July and November.

Table 5.5 Peak Charter Months During Past 12 Months

Months	Sample Count	Percent of Fishery
January	42	21.8
February	12	6.2
March	17	8.8
April	32	16.6
May	34	17.6
June	52	26.9
July	78	37.3
August	72	37.3
September	85	44.0
October	94	48.7
November	68	35.2
December	50	25.9

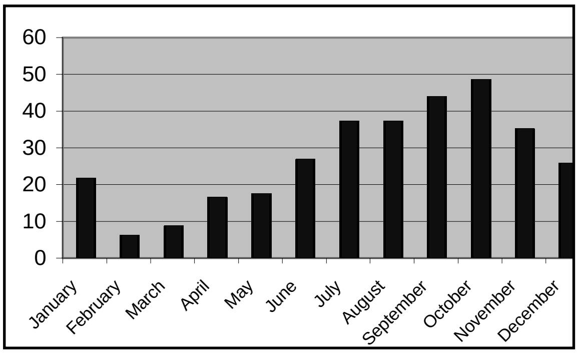

Figure 5.2 Seasonal Variation in Charter Activity

Location of Resource Use

Figure 5.3 shows the location of resource use among commercial charter fishing operations in Queensland. The most commonly used areas by charter operators were the Swains Reefs, the Capricorn-Bunkers, and the reefs closest to Cairns and Port Douglas.

Charter Fishing Employees

Table 5.6 identifies the number of employees of charter business within Queensland. Most businesses had only one fulltime employee (the owner-operator) (46.2%), and 36.6% had over two fulltime employees. Only 26.6% of businesses had part-time employees, and 42.7% of businesses had at least one casual employee. There was an average of 2.6 fulltime equivalent employees per business, and it is estimated that there were 664 people working in the charter industry in Queensland over the previous year.

Table 5.7 shows the number of fulltime equivalent employees across each TRC. The TRCs with the highest number of employees were Cairns (86), Gladstone (85), Airlie Beach (71), Southport (66) and Mooloolaba (57).

Business Ownership and Size

Table 5.8 shows that the average number of years of current ownership of the charter businesses in Queensland was 7.0 years. Most businesses were owned for less than 5 years (57.1%), and 19.6% of businesses have been owned for more than 10 years.

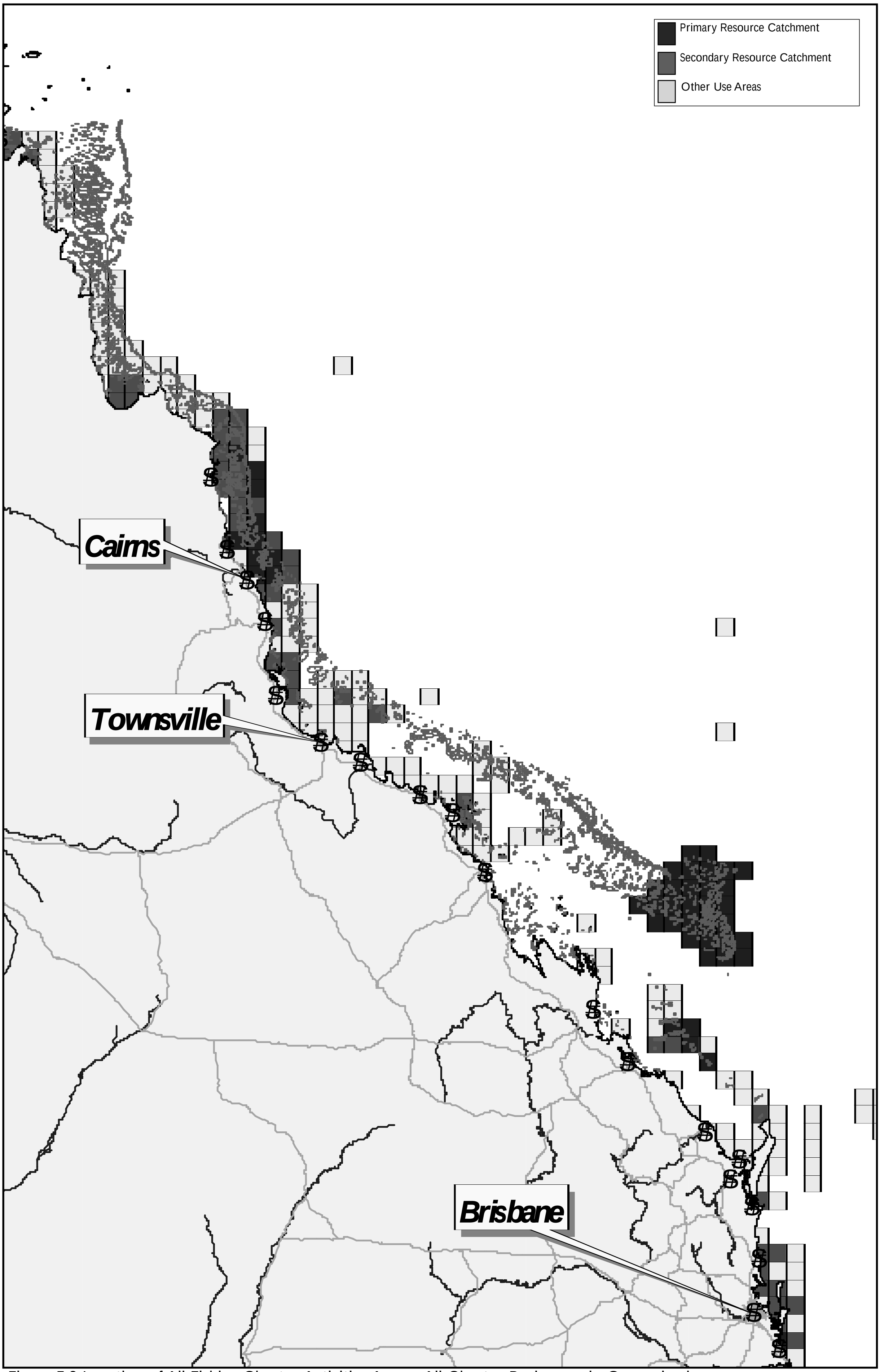

Figure 5.3 Location of All Fishing Charter Activities Across All Charter Businesses in Queensland.

Table 5.6 Number of Charter Employees

Number of Charter operators	Full-Time Count	Full-Time Percent	Part-Time Count	Part-Time Percent	Causal Count	Casual Percent
Nil	34	17.1	146	73.4	114	57.3
1	92	46.2	26	13.1	42	21.1
2-3	56	28.1	19	9.5	30	15.0
4-5	10	5.0	7	3.5	8	4.0
5+	6	3.5	1	0.5	5	2.5
Total Businesses	199					
Total Charter Employees	361		113		190	
Mean Number of Employees per Business			2.6			
Mean Number of Full-time Employees per Business				1.8		
Mean Number of Part-time & Casual Employees per Business			1.5			
Estimated Number Employed within QLD				664		

Note: Part-time and casual employment was recorded as 0.5 when contributing to total employment. Total number of employees includes the respondent.

Table 5.7 Number of Fulltime Equivalent Employees Across TRCs

TRC	Sample Count	Percentage QLD
Karumba	12	1.8
Weipa	15	2.2
Thursday Island	27	4.0
Cooktown	24	3.5
Port Douglas	47	6.9
Cairns	86	12.7
Innisfail	6	0.9
Lucinda	1	0.1
Townsville	29	4.3
Ayr	2	0.3
Airlie Beach	71	10.5
Mackay	47	6.9
Yeppoon	5	0.7
Gladstone	85	12.5
Bundaberg	4	0.6
Hervey Bay	48	7.1
Tin Can Bay	2	0.3
Mooloolaba	57	8.4
Brisbane	44	6.5
Southport	66	9.7
TOTAL	678	100

Table 5.8 Number of Years of Current Ownership of the Charter Business

Number of Years	Sample Count	Percent within QLD	Cumulative Percent
1-5	113	57.1	57.1
6-10	46	23.3	80.3
11-15	21	10.5	90.9
15+	18	9.1	100.0
Total		100.0	100.0
Mean Number of Years owned or operated			7.0

Note: Standard error = 0.5

Table 5.9 shows the mean years of current ownership of charter businesses by TRC. The TRCs in which the businesses have been owned the longest are Mackay (13.2 years), Gladstone (12.6 years) and Yeppoon (12.3). The TRCs in which businesses have been owned for the shortest period of time were Weipa (1.6 years), Ayr (2.0) and Karumba (2.7 years).

Table 5.9 Mean Years of Current Ownership of Charter Businesses by TRC.

TRC	Mean Years	Standard Error
Karumba	2.7	0.7
Weipa	1.6	0.2
Thursday Island	4.6	1.5
Cooktown	3.6	1.2
Port Douglas	8.0	1.3
Cairns	7.5	0.9
Innisfail	3.9	2.0
Lucinda	6.5	0.0
Townsville	6.5	1.3
Ayr	2.0	0.0
Airlie Beach	4.3	1.6
Mackay	13.2	4.7
Yeppoon	12.3	2.3
Gladstone	12.6	2.4
Bundaberg	7.1	3.9
Hervey Bay	5.2	1.8
Tin Can Bay	5.5	2.5
Mooloolaba	5.3	0.8
Brisbane	7.1	1.8
Southport	5.6	1.5

Table 5.10 shows the number of years of operation for charter businesses in Queensland. The average number of years of operation was 8.3 years, with most businesses operating for less than 5 years (51.0%).

Table 5.10 Number of Years Business has been Operating

Number of Years	Sample Count	Percent within QLD	Cumulative Percent
1-5	101	51.0	51.0
6-10	46	24.3	75.3
11-15	27	13.5	88.9
15+	24	11.2	100.0
Total			
Mean Number of Years owned or operated			8.3

Note: Standard error = 0.6

Table 5.11 shows the mean number of years of operation of charter businesses by TRC. The TRCs in which charter businesses have been operating the longest were Airlie Beach (16.9 years), Gladstone (16.6 years), Mackay (16.0 years), Yeppoon (14.0 years) and Port Douglas (9.7 years). The newest businesses were found in Weipa (1.5 years), Ayr (2.0 years), Southport (4.6 years) and Thursday Island (5.0 years) TRCs.

Table 5.11 Mean Years of Operation of Charter Businesses by TRC.

TRC	Sample Count	Percentage QLD
Karumba	5.6	2.4
Weipa	1.6	0.7
Thursday Island	5.0	2.1
Cooktown	5.6	2.4
Port Douglas	9.7	4.1
Cairns	7.7	3.3
Innisfail	3.9	1.7
Lucinda	6.5	2.8
Townsville	6.3	2.7
Ayr	2.0	0.9
Airlie Beach	16.9	7.2
Mackay	16.0	6.8
Yeppoon	14.0	6.0
Gladstone	16.6	7.1
Bundaberg	7.5	3.2
Hervey Bay	8.2	3.5
Tin Can Bay	5.5	2.4
Mooloolaba	6.1	2.6
Brisbane	7.1	3.0
Southport	4.6	2.0

Table 5.12 shows that most charter businesses in Queensland owned one boat (79.3%), and that the average was 1.3 boats per business.

Table 5.12 Number of Boats Operated by Businesses

Number of Boats	Sample Count	Percent QLD
1	157	79.3
2	25	12.6
3	13	6.6
4+	3	1.5
Total Number of Businesses	198	100.0
Mean Number of Boats Operated		1.3

Note: Standard error = 0.06

Table 5.13 shows the mean number of boats operated by each business in each of the TRCs. Airlie Beach (3.0 boats) and Thursday Island (2.2 boats) have a relatively high number of boats per business. Other TRCs have an average between 1 and 1.6 boats per business.

Table 5.14 shows the frequency distribution of the length of boats operated. Nearly 29% of boats were less than 6m, and 13.9% were greater than 18m. The mean length of charter boats in Queensland was 11.4m, and the mean length of the largest boat operated by a business was 11.7m.

Table 5.15 shows the mean length of boats and the mean length of the largest boat owned by businesses in each TRC. The largest boats were found in businesses in the Mackay (20.4m), Gladstone, (17.8m), Yeppoon (17.2m), Port Douglas (16.0) and Airlie Beach (15.6m) TRCs. The smallest boats were found in the Ayr (4.2m), Karumba (6.6m), Weipa (7.7m) and Cooktown (7.5m) TRCs.

Table 5.13 Mean Number of Boats by TRC.

TRC	Mean Number of Boats	Standard Error
Karumba	1.2	0.2
Weipa	1.0	0.0
Thursday Island	2.2	0.4
Cooktown	1.2	0.2
Port Douglas	1.0	0.0
Cairns	1.3	0.1
Innisfail	1.0	0.0
Lucinda	1.0	0.0
Townsville	1.1	0.2
Ayr	1.0	0.0
Airlie Beach	3.0	1.4
Mackay	1.1	0.1
Yeppoon	1.0	0.0
Gladstone	1.3	0.1
Bundaberg	1.0	0.0
Hervey Bay	1.3	0.2
Tin Can Bay	1.0	0.0
Mooloolaba	1.6	0.3
Brisbane	1.4	0.2
Southport	1.3	0.2

Table 5.14 Length of Vessels Operated by Charter Businesses

Length of Boat (metres)	Sample Count	Percent QLD
2-6	77	28.8
7-10	56	20.6
11-14	63	24.0
15-18	34	12.7
18-24	21	7.9
24+	16	6.0
Total Number of Boats	267	100.0
Mean Length of Boats Operated (metres)		11.4
Mean Length of Largest Boat Operated (metres)		11.7

Note: Standard errors for mean length of boat = 0.4
Standard errors for mean length of largest boat = 0.5

Table 5.15 Mean Boat Length and Largest Boat by TRC

TRC	Mean Length of Boats	Mean Length Largest Boat
Karumba	6.6	6.8
Weipa	7.4	7.7
Thursday Island	8.4	10.8
Cooktown	7.5	7.5
Port Douglas	16.0	16.0
Cairns	9.7	10.7
Innisfail	6.2	6.2
Lucinda	5.5	5.5
Townsville	8.6	9.3
Ayr	4.2	4.2
Airlie Beach	15.6	15.6
Mackay	20.4	18.6
Yeppoon	17.2	17.2
Gladstone	17.8	17.8
Bundaberg	8.9	9.0
Hervey Bay	12.1	13.1
Tin Can Bay	9.0	9.0
Mooloolaba	12.4	12.4
Brisbane	10.5	11.8
Southport	7.9	8.8

GROSS VALUE OF PRODUCTION (GVP)

All charter businesses were asked for information about their business income before tax for the 12 months prior to the survey. Of 199 charter businesses, 36 did not provide this information to the interviewer. Correlations were made between business income and several other variables in order to find the best predictor of business income for these 36 businesses. The length of the largest vessel was the best indicator, and estimated values were made on this basis.

Table 5.16 displays the distribution of GVP for each charter-operator in Queensland. Nearly two-thirds of businesses (65.8%) had an income of less than $100,000 during the previous twelve-months. Over 11% of businesses earned between $100,000-$200,000, and 22% of businesses produced between $200,000-$700,000. This distribution indicates that the industry was mostly skewed towards smaller businesses, with only around one-third of businesses having an income level higher than $100,000 per annum.

Table 5.16 Histogram of GVP for Sampled Businesses

Gross Value of Production ($'000)	Sample Count	Percent	Cumulative Percent
1 - 100	131	65.8	65.8
100 - 200	23	11.5	77.4
200 - 300	15	7.5	84.9
300 - 400	8	4.0	88.9
400 - 500	12	6.0	95.0
500 - 600	4	2.0	97.0
600 - 700	5	2.5	99.5
700 - 800	0	0.0	99.5
800 - 900	0	0.0	99.5
900 - 1,000	0	0.0	99.5
1,000 +	1	0.5	100.0
Sample size			199
Mean GVP			$131,000
Median GVP			$50,000
SE GVP			$11,400
Sum			$26,075,000
Estimated Total GVP for QLD			$ 34,419,000

Table 5.17 shows the Annual GVP and Mean GVP for businesses across each TRC. Businesses in the Port Douglas Mackay, Airlie Beach and Gladstone TRCs had the highest incomes over the previous year. The annual GVP for the industry was highest in the Gladstone (18.8%), Cairns (14%) and Port Douglas (13.7%) TRCs.

Table 5.18 shows the mean number of customers per business and the total number of customers over the previous year for each TRC. The TRCs receiving the highest number of customers per business were the Mackay (3,457), Gladstone (3,080) and Mooloolaba (2,674) TRCs. The Weipa (204), Cooktown (290) and Karumba (349) TRCs had the lowest number of customers per business.

It was estimated that the total number of customers chartering fishing trips in Queensland over the previous year was 230,000. The TRCs with the highest number of customers in total were Gladstone (24.3%), Mooloolaba (15.2%), Cairns (14%) and Southport (12.1%).

Table 5.17 Annual GVP and Mean GVP for businesses by TRC.

TRC	Mean GVP ($,000)	Annual GVP ($,000)	Percentage QLD Total
Karumba	50	396	1.2
Weipa	50	396	1.2
Thursday Island	65	429	1.3
Cooktown	65	429	1.3
Port Douglas	325	4,719	13.8
Cairns	122	4,818	14.1
Innisfail	50	200	0.6
Lucinda	50	50	0.1
Townsville	70	1,389	4.1
Ayr	50	50	0.1
Airlie Beach	233	1,848	5.4
Mackay	278	2,937	8.6
Yeppoon	50	450	1.3
Gladstone	233	6,468	19.0
Bundaberg	50	150	0.4
Hervey Bay	108	1,848	5.4
Tin Can Bay	50	100	0.3
Mooloolaba	120	2,376	7.0
Brisbane	72	1,716	5.0
Southport	97	3,333	9.8
			0.0
Total	228,294	34,102,000.0	100.0

Table 5.18 Mean and Total Number of Customers Per Business for each TRC.

TRC	Mean No. of Customers	Total Number of customers	% QLD Total
Karumba	349	1,745	0.8
Weipa	204	1,223	0.5
Thursday Island	839	3,356	1.5
Cooktown	290	1,451	0.6
Port Douglas	1,487	14,873	6.5
Cairns	1,182	31,924	14.0
Innisfail	85	254	0.1
Townsville	533	6,923	3.0
Ayr	40	40	0.0
Airlie Beach	1,045	4,180	1.8
Mackay	3,457	20,740	9.1
Yeppoon	1,388	4,166	1.8
Gladstone	3,080	55,436	24.3
Bundaberg	318	955	0.4
Hervey Bay	1,097	12,069	5.3
Tin Can Bay	480	480	0.2
Mooloolaba	2,674	34,758	15.2
Brisbane	360	6,111	2.7
Southport	1,315	27,609	12.1
			0.0
Total		228,293	100.0

Social and Demographic Profiles

Table 5.19 shows the owner-operator demographic profiles for charter operators in Queensland.

Table 5.19. Owner-Operator Profiles

Profile	All QLD Charter operators
Estimated Number of Charter Operators	199
Mean age of operator	45.4
Age range	20-76
Percent males	93.8
Mean years resident in town	19.1
Mean number of years in charter industry	11.0
Mean hours per week in charter industry	50.7
Percent moved town to retain employment	14.0
Percent currently employed in other industry	46.1
Percent previously employed in other industry	93.7
Housing tenure (%)	
Rent	14.1
Mortgage	33.0
Own home	50.8
Other (eg, live with parents, on boat)	2.0
Education	
Year completed school (%)	
Primary school	3.2
Year 8	3.2
Year 9	4.7
Year 10	32.6
Year 11	10.5
Year 12	45.8
Percent completed trade or TAFE certificate	52.2
Percent completed industry or business course	55.6
Percent with business plan	53.4
Marital Status	
Percent married or relationship	88.1
*Partner's Income**	
Full-time employment	52.2
Part-time employment	23.3
Casual employment	8.8
Not employed	15.7
Family Composition	
Mean family size	3.2
Estimated number of total family members	596
Dependency Ratios	
Age Dependency Ratio**	21.7
Elderly Dependency Ratio	1.2
Child Dependency Ratio	20.6
Family Member Industry Dependency Ratio***	20.4
Gross Individual Income (%)	
Less than $16,000	39.2
$16,000 - $26,000	22.2
$26,000 - $36,000	9.5
$36,000 - $52,000	13.3
$52,000 - $78,000	9.5
Over $78,000	6.3
Average Income ($)	28,000

Note: **Percentage based on those charter operators with partners. Includes partners income from all sources.*
***The age dependency ratio is the number of children (below 15 years) and elderly persons (above 65 years) to every 100 persons in the population*
****The industry dependency ratio is the number of persons in the family who are over 15 years of age and working in the charter industry as a proportion of all family members over 15 years of age.*