

14 MACKAY TRC

The Mackay TRC consists of the main urban centre of Mackay and smaller towns to the north including Calen, towns to the west including Finchhatten and towns to the south including St Lawrence.

BUSINESS PROFILES

Location and Use of Ports

Table 14.1 shows the number of license holders within the Mackay TRC and the number of survey respondents who reported having homeports within the TRC. On the basis of the sample count it is estimated that there are 11 commercial charter operators within this TRC and a 95% certainty that the correct population count of commercial charter operators within the TRC is between 5 and 17. Figure 1 shows the geographic location of the Mackay TRC.

Table 14.1 Location of Homeports

Town	Adj. Database Count	Sample Count	Estimated Count	Percent within TRC
Mackay	10	8	11	100.0
Total TRC	10	8	11	100.0
95% Confidence Interval for Estimated TRC Count				5-17
Percent of Total Active License Holders in QLD				4.0%

Note: Adjusted database count is based on the postal address as recorded in the licensing information, which may not be the homeport of the charter business. The count is adjusted for latent license holders (8.6%).
The estimated count adjusts the sample count by the sampling fraction of 1.32

Fishing Activity

Table 14.2 shows the types of fishing trips that were chartered from the Mackay TRC over the previous year. On all trips (day, overnight and extended), reef fishing and game fishing were the main fishing activities. The mean time spent reef fishing on all trips was considerably greater than the Queensland average.

Table 14.2 Type of Fishing Activity (during the last 12 months)

Fishing Type	Day trips		Overnight trips		Extended trips	
	Mean % Time within TRC	Mean % Time QLD	Mean % Time within TRC	Mean % Time QLD	Mean % Time within TRC	Mean % Time QLD
Reef (bottom fishing)	75.0	47.5	90.0	66.0	87.5	51.2
Game (pelagic)	25.0	18.8	10.0	20.3	9.2	31.1
Estuary	0.0	26.8	0.0	11.6	1.7	12.5
Crabbing	0.0	0.5	0.0	0.2	1.7	0.5
Other	0.0	6.4	0.0	2.0	0.0	4.6
Total Sample	100.0	100.0	100.0	100.0	100.0	100.0

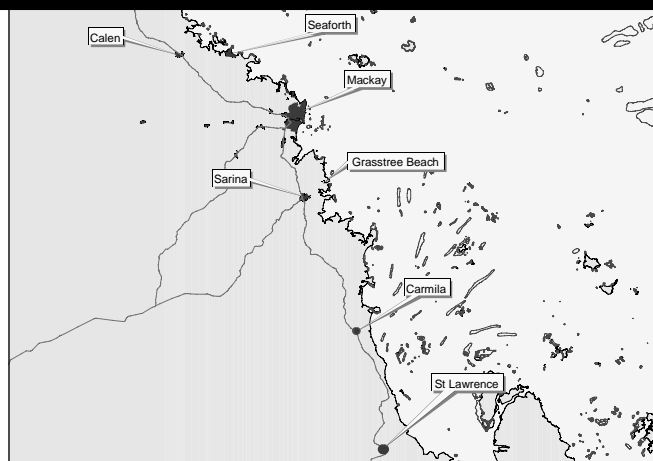


Figure 14.1 Location of the Mackay TRC

Table 14.3 shows the number of trips chartered from the Mackay TRC and the percentage of trips that were primarily for fishing. Most trips from the Mackay TRC were extended trips (903 days), and 56% were fishing charters. There were 602 day trips chartered from the TRC, and only 24.9% were specifically fishing trips, which is considerably less than the Queensland average of 70.2%. There were 246 days of overnight trips, and only 13.8% were chartered primarily for fishing, which is also significantly less than the Queensland average (62%).

Table 14.4 shows the percentage of time spent fishing and doing other activities such as diving and cruising, for trips where fishing was not the only activity. On day trips the main activity was cruising and sightseeing (49.2%), and fishing represented 33.3% of activities. On overnight trips, the main activities were cruising and sightseeing (45%) and fishing (42.5%). On extended trips, 45% of time was spent on other activities such as transportation, and fishing only represented 14.8%.

Table 14.5 shows the peak months for charter activity within the Mackay TRC. September to November were the peak months for this TRC, which was a shorter peak season than the Queensland average (June to December).

Table 14.3 Number of Charter Trips (during the last 12 months)

Type	Mean within TRC	QLD Mean
Day Trips		
Mean number of day-trips (per business)	75.2	85.3
Mean number of fishing-only day-trips	18.7	59.9
Total number of day-trips	602	16,976
Total number of fishing-only day-trips	150	11,919
Percentage fishing-only	24.9%	70.2%
Overnight Trips		
Mean number of overnight trips (per business)	30.75	5.39
Mean number of fishing-only overnight-trips	4.25	3.34
Total number of days on overnight trips	246	1,072
Total number of fishing-only days on overnight trips	34	665
Percentage fishing-only	13.8%	62.0%
Extended Trips		
Mean number of extended-trips	25.88	6.9
Mean number of fishing-only extended-trips	14.50	4.49
Total number of days on extended trips	903	6,881
Total number of fishing-only days on extended trips	506	4,385
Percentage fishing-only	56.0%	66.1%
Mean number of days away (per business)	137.1	121.3
TOTAL days charter	1,751	16,969
Percentage charter- fishing only	39.4%	68.1%

Table 14.4 Charter Activities (during the last 12 months)

Type	Within TRC	QLD Mean
Day Trips		
% time spent fishing	33.3	52.9
% time spent diving/snorkeling	17.5	13.1
% time spent cruising/sightseeing	49.2	17.5
% time spent sailing	0.0	0.4
% time spent whale & dolphin watching	0.0	4.2
% time spent doing other activities	0.0	11.9
Overnight Trips		
% time spent fishing	42.5	51.2
% time spent diving/snorkeling	12.5	22.9
% time spent cruising/sightseeing	45.0	15.9
% time spent sailing	0.0	0.0
% time spent whale & dolphin watching	0.0	0.0
% time spent doing other activities	0.0	10.0
Extended Trips		
% time spent fishing	14.8	51.2
% time spent diving/snorkeling	14.5	31.1
% time spent cruising/sightseeing	9.0	12.5
% time spent sailing	0.0	0.6
% time spent whale & dolphin watching	16.7	0.0
% time spent doing other activities	45.0	4.6

Table 14.5 Peak Charter Months During Past 12 Months

Months	Sample Count	Percent within TRC	Percent of QLD Fishery
January	0	0.0	21.8
February	0	0.0	6.2
March	0	0.0	8.8
April	0	0.0	16.6
May	0	0.0	17.6
June	0	0.0	26.9
July	0	0.0	37.3
August	2	25.0	37.3
September	5	62.5	44.0
October	8	100.0	48.7
November	5	62.5	35.2
December	1	12.5	25.9

Location of Resource Use

Figure 14.2 shows the location of resource use by commercial charter operators in the Mackay TRC. The location of resource use was primarily around the Whitsunday Islands, as well as the outer reefs north of the Islands (for example around Hardy's Reef), and east of the Islands, (for example around Hydrographer's Passage).

Charter Industry Businesses

Table 14.6 identifies the number of charter operators within the Mackay TRC. The majority of businesses had 1-3 fulltime employees and 1 casual employee. The average number of fulltime equivalent employees per business was 4.0. In summary it is estimated that there were 47 people employed in the charter industry over the previous year.

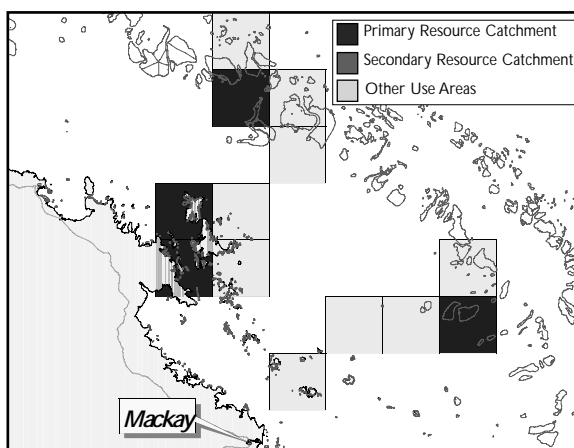


Figure 14.2 Mackay TRC: Location of Resource Use

Table 14.6 Number of Employees

Number of Charter Employees	Full-Time Count	Full-Time Percent	Part-Time Count	Part-Time Percent	Casual Count	Casual Percent
Nil	1	12.5	8	100.0	3	37.5
1	2	25.0	0	0.0	3	37.5
2-3	3	37.5	0	0.0	0	0.0
4-5	1	12.5	0	0.0	1	12.5
5+	1	12.5	0	0.0	1	12.5
Total Businesses	8	100.0	8	100.0	8	100.0
Total Employees	32		0		15	
Mean Number of Employees per Business				4.9		
Mean Number of Full-time Employees per Business				4.0		
Mean Number of Part-time & Casual Employees per Business				1.9		
Estimated Number Employed within the TRC				47		

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

Business Ownership and Size

Table 14.7 shows the number of years the current owner-operator had owned the charter business. Most businesses were less than 5 years old (37.5%), and 25% of businesses had been owned by the current owner for more than 15 years. The average number of years owned was 13.2, which was 6.2 years more than the Queensland average (7.0%).

Table 14.7 Number of Years of Current Ownership of the Charter Business

Number of Years	Sample Count	Percent within TRC	Cumulative Percent
1-5	3	37.5	37.5
6-10	2	25.0	62.5
11-15	1	12.5	75.0
15+	2	25.0	100.0
Total	6	100.0	100.0

Mean Number of Years owned or operated 13.2
Difference of TRC Mean to QLD Population Mean (7.0) +6.2

Note: Standard errors for number of years ownership (sample = 4.7; QLD population = 0.5).

Table 14.8 shows the number of years the charter business had been operating. Businesses had been operating for anything from 1 to more than 15 years, with an average of 16 years. This average was nearly 8 years more than the Queensland average (8.3 years).

Table 14.8 Number of Years Business has been Operating

Number of Years	Sample Count	Percent within TRC	Cumulative Percent
1-5	2	25.0	25.0
6-10	2	25.0	50.0
11-15	2	25.0	75.0
15+	2	25.0	100.0
Total	8	100.0	100.0

Mean Number of Years owned or operated 16.0
Difference of Mean to Population Mean (8.3) +7.7

Note: Standard errors for number of years operated (sample = 6.0; QLD population = 0.6)

Table 14.9 shows the number of boats owned by each business in the Mackay TRC. The majority of charter businesses operated one boat (87.5%). The average number of boats owned was 1.1, which is only slightly less than the Queensland average (1.3 boats).

Table 14.9 Number of Boats Operated by Charter Businesses

Number of Boats	Sample Count	Percent TRC
1	7	87.5
2	1	12.5
3	0	0.0
4+	0	0.0
Total Number of Businesses	8	100.0

Mean Number of Boats Operated 1.1
Difference of Mean to QLD Population Mean (1.3) -0.2

Note: Standard errors for number of boats operated (sample = 0.1; QLD population = 0.06)

Table 14.10 shows the frequency distribution of the length of boats within the Mackay TRC. Most boats were between 11-14m in length, and 33.3% were greater than 30m. The mean length, and the mean length of the largest vessel for the TRC was 20.4m and 18.6m respectively. Both averages were significantly larger than the Queensland average (11.4m and 11.7m).

Table 14.10 Length of Vessels Operated by Charter Businesses

Length of Boat (metres)	Sample Count	Percent TRC
2-6	0	0.0
7-10	0	0.0
11-14	5	55.5
15-18	1	11.1
18-24	0	0.0
24-30	0	0.0
30+	3	33.3
Total Number of Boats	9	100.0

Mean Length of Boats Operated (metres) 20.4
Difference of Mean to QLD Population Mean (11.4) +9.0
Mean Length of Largest Boat Operated (metres) 18.6
Difference of Mean to QLD Population Mean (11.7) +6.9

Note: Standard errors for mean length of boats (sample = 3.5; QLD population=0.4) and mean length of largest boats (sample =; QLD population=0.5).

Value of Production and Location of Sales

Table 14.11 shows the profile of business incomes for each charter operation within the Mackay TRC for the twelve months prior to the survey. The profile indicates that 37.5% of businesses earned less than \$100,000, and that 37.5% earned between \$400-500,000. The mean for the TRC was \$278,000, and the total GVP was estimated at \$2.9 million, representing 8.5% of the Queensland value.

Table 14.11 Business Income (Annual value)

Value (\$,000)	Sample Count	Sample Percent	Queensland Percent
Less than \$100	3	37.5	65.8
\$101 - \$200	0	0.0	11.5
\$201 - \$300	1	12.5	7.5
\$301 - \$400	0	0.0	4.0
\$401 - \$500	3	37.5	6.0
\$501 - \$600	0	0.0	2.0
\$601 - \$700	1	12.5	2.5
\$701 - \$800	0	0.0	0.0
\$801 - \$900	0	0.0	0.0
\$901 - \$1,000	0	0.0	0.0
Over \$1,000	0	0.0	0.5
Total	8	100.0	100.0

Mean GVP for TRC \$278,000
 Estimated Total GVP for TRC \$2,937,000
 Estimated Total GVP for QLD \$34,419,000
 Percent of Total Queensland Production 8.5%

Note: Estimated GVP is based on the sample GVP total multiplied by the sampling fraction of 1.32

Table 14.12 shows the number of customers that chartered trips from the Mackay TRC. There were 38,000 customers estimated for the TRC, representing 11.1% of the industry's clients. The mean number of customers per business (3,456) was very much higher than the mean per average Queensland business (1,335).

Table 14.12 Number of Customers per Year

	Mean Customers per Business	Sample Count	Estimated Total
Mackay TRC	3,456	20,740	38,023
QLD	1,335	259,930	343,100

Percent of Queensland 11.1%

Table 14.13 shows the origin, and the associated value, of customers visiting the Mackay TRC. The total value of sales for the TRC was estimated at \$2.9 million, and was derived mostly from the local market (30%), as well as from other parts of Queensland (23.1%), Australia (27.6%) and overseas (19.3%).

Table 14.13 Origin and Value of Customers

	Sample Value of Sales	Mean Percent of Sample	Est. Value of all Sales
Local area	667,500	30.0	881,100
Queensland	513,975	23.1	678,447
Outside Queensland	614,100	27.6	810,612
Overseas	429,425	19.3	566,841
Total Sales	\$2,225,000	100.0	\$2,937,000

Note: The sample value of sales is based on GVP as reported by businesses in the survey

Business Expenditure

Table 14.14 shows the location of expenditure on business goods and services (excluding salaries and wages) by charter businesses in the Mackay TRC. It was estimated that \$1.5 million was spent on business goods and services over the previous year and that the majority was spent in Mackay (78.5%). Some 8.2% was spent in Gladstone, and several other towns and locations in Queensland were also recipients of this expenditure.

Table 14.14 Town Location of Business Expenditure (All costs, excluding salaries and wages)

Location of Expenditure	Sample Value of Expenditure	Percent of Sample	Est. Value Expenditure
Mackay	909,972	78.5	1,201,129
Gladstone	95,054	8.2	125,468
Brisbane	67,234	5.8	88,746
Cairns	60,278	5.2	79,565
Hamilton Island	12,751	1.1	16,831
Caboolture	6,955	0.6	9,181
Sarina	6,955	0.6	9,181
Total Expenditure	\$1,159,200	100.0	\$1,530,100

Note: Business expenditure includes all non-labour expenditure (i.e. fuel, equipment, repairs etc)
 Coefficients from the QLD input-output table for 1992-1993 indicate that expenditure on local intermediate purchases and imports, accounted for 52.1% of total revenue. The amount of business expenditure occurring within specific locations is based on 52.1% of the estimated GVP for the business.

CHARTER-OPERATOR PROFILES

Town of Residence

Table 14.15 shows the towns of residence of charter operators for the Mackay TRC. All operators resided within Mackay.

Table 14.15 Town of Residence

Town of Residence	Sample Count	Percent of Sample
Mackay	8	100.0
Total	8	100.0

Months Employed in the Charter Industry

Table 14.16 shows the months in which owner-operators were employed in the charter industry. All operators were employed between March and December.

Table 14.16 Months Employed in the Charter Industry

Months	Owner Operators %	All QLD Operators
January	83.3	81.0
February	83.3	81.5
March	100.0	85.7
April	100.0	89.4
May	100.0	92.6
June	100.0	92.6
July	100.0	92.6
August	100.0	93.7
September	100.0	95.2
October	100.0	93.7
November	100.0	91.5
December	100.0	86.8

Location of Household Expenditure

Table 14.17 shows the towns in which household items were purchased for charter operators and their families in the Mackay TRC. It is estimated that \$303,000 was spent on household commodities and services, and that the majority was spent in Mackay (92%).

Table 14.17 Town Location of Household Expenditure
(All commodities and services)

Location of Household Expenditure	Sample Value of Expenditure	Percent of Sample	Est. Value Expenditure
Mackay	210,497	92	277,878
Gladstone	16,051	7	21,189
Brisbane	1,375	1	1,816
Tasmania	1,375	1	1,816
Total Expenditure	\$229,300	100.0	\$302,700

Note: The sample total personal income for the Mackay TRC was \$377,000. The Household Expenditure Survey for Queensland: 1993-1994 (ABS, 1996) indicates that for households in non-metropolitan areas 79% of gross weekly income was related to commodity and service purchases. Furthermore, of the total expenditure on commodities and services purchased by households, Queensland Input-Output tables indicate that 77% of expenditure occurs within Queensland, with the balance contributing to taxes and imports from outside Queensland. The sample value of expenditure was therefore calculated to be \$229,300. Estimated value of expenditure was calculated by multiplying the sample value of expenditure by 1.32

School and Employment Locations of Family Members

The town locations in which family members attended school or were employed are shown in Table 4.18. Most family members attended school or were employed in Mackay (78.9%).

Table 14.18 School and Employment Locations of Family Members

Location of Employment or School	Sample Count	Percent of Sample
Mackay	15	78.9
Brisbane	2	10.5
NSW	1	5.3
Overseas	1	5.3
Total Family Members	19	100.0

Note: Counts and percentages based on all immediate family members.

Social and Demographic Profiles

Table 14.19 shows the profile of charter owner-operators for the Mackay TRC. These charter operators were generally older, had been in the industry and resident town for longer, were more likely to have completed a business course, had fewer dependents and more family members in the industry.

Table 1419 Owner-Operator Profiles for the Mackay TRC

Profile	Owner-Operators	All QLD Operators
Estimated Number of Charter-owners	8	191
Mean age of fisher	55.8	45.4
Age range	48-60	20-76
Percent males	87.5	93.8
Mean years resident in town	28.7	19.1
Mean number of years in charter industry	16.8	11.0
Mean hours per week in charter industry	78.9	50.7
Percent moved town to retain employment	14.3	14.0
Percent currently employed in other industry	42.9	46.1
Percent previously employed in other industry	85.7	93.7
Housing tenure (%)		
Rent	14.3	14.1
Mortgage	28.6	33.0
Own home	57.1	50.8
Other (eg, live with parents, on boat)	0.0	2.0
Educational		
Year completed school (%)		
Primary school	0.0	3.2
Year 8	14.3	3.2
Year 9	14.3	4.7
Year 10	28.6	32.6
Year 11	0.0	10.5
Year 12	42.9	45.8
Percent completed trade or TAFE certificate	28.6	52.2
Percent completed industry or business course	71.4	55.6
Percent with business plan	57.1	53.4
Marital Status		
Percent married or relationship	85.7	88.1
Partner's Income*		
Full-time employment	66.7	52.2
Part-time employment	16.7	23.3
Casual employment	16.7	8.8
Not employed	0.0	15.7
Family Composition		
Mean family size	3.3	3.2
Estimated number of total family members	20	596
Dependency Ratios		
Age Dependency Ratio**	0.0	21.7
Elderly Dependency Ratio	0.0	1.2
Child Dependency Ratio	0.0	20.6
Family Member Industry Dependency Ratio***	37.5	20.4
Gross Individual Income (%)		
Less than \$16,000	32.0	39.2
\$16,000 - \$26,000	16.0	22.2
\$26,000 - \$36,000	16.0	9.5
\$36,000 - \$52,000	24.0	13.3
\$52,000 - \$78,000	4.0	9.5
Over \$78,000	8.0	6.3
Average Income (\$)	30,750	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.