

A Guide to the Fishers of Queensland

Part C: TRC-Analysis and Social Profiles of Queensland's Charter Fishing Industry

D. Mark Fenton and Nadine A. Marshall

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CRC Reef Research Centre
c/- James Cook University
TOWNSVILLE QLD 4811
Phone: 07 4781 4976
Fax: 07 4781 4099
Email: crcreef@jcu.edu.au
Web: www.reef.crc.org.au

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TRC Profiles

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Executive Summary

This report describes the social and financial characteristics of the charter fishing industry in Queensland. It also identifies the social and financial relationships that exist between the fisheries resource and coastal communities using a research framework known as Town Resource Cluster (TRC) Analysis.

The objective of this report is to provide a comprehensive profile of the charter fishing industry in Queensland that can assist in assessing potential social and financial impacts of changes in fisheries policy and management. This information is not a social impact assessment.

In this report, charter fishers are those tourism operations that hold a licence to fish. Social and financial information was collected from charter fishers using structured telephone interviews. The interview included questions on the charter fishing business and the use of the marine resource. It included questions on the location of homeports, years of business operation, number of boats, size of boats, type of fishing activity and seasonal variations in fishing. There were also questions about the number of employees, the value and location of sales and the town locations for business expenditure, as well as the location of resource use and the use of coastal ports when accessing different areas of resource use.

To develop social profiles of charter fishers within the industry, business operators gave information about their family and employees, (including age, gender, marital status, housing tenure, educational levels, place of residence, hours worked in the industry), and the towns from which they purchased household goods and services.

Ninety-five percent of charter operators that could be contacted participated in the research (199 questionnaires) representing 77% of the industry. Of the 287 licence holders that exist in Queensland, 25 (8.6%) were considered latent, or no longer in business.

The profiles were analysed using a recently developed framework for social assessment in natural resource management known as Town Resource Cluster Analysis (TRC-Analysis). This framework best examines the relationship between resource systems and human social systems. Specifically, the analysis identifies clusters of mutually interdependent towns and communities (TRCs) that have relationships to specific areas of marine resource use.

Twenty-two TRCs were identified along the Queensland coast from Karumba in the north to Southport in the south of Queensland. A detailed description of the social and financial profiles within each TRC is provided for those TRCs in which there were at least five charter operators.

A summary of the social and financial profiles of the charter fishing industry is presented in tables A (business characteristics) and B (business owner characteristics). The majority of charter fishing businesses in Queensland were located in the Cairns, Brisbane and Southport TRCs, although many staff were also employed in the Airlie Beach and Gladstone TRCs (Table A). The businesses that had been owned for the longest time were in the Mackay and Gladstone TRCs. The largest numbers of boats were owned by businesses in the Thursday Island and Airlie Beach TRCs, although the largest boats were in the Mackay, Gladstone and Port Douglas TRCs. Businesses with the highest annual gross values of production (GVPs) were in the Port Douglas TRC, although businesses in the Mackay, Airlie Beach and Gladstone TRCs also had relatively high GVPs. The TRC that had the largest total GVP for the year was recorded in the Gladstone TRC.

The profiles of charter operators (Table B) show several unique characteristics. The oldest charter-operators were found in the Mackay and Hervey Bay TRCs. Those operators in the northern and Gulf regions, as well as those in the Airlie Beach TRC were newer residents to their town, and to the industry, whereas charter operators in TRCs such as Mackay, Brisbane and Southport, have been in the charter industry for longer. All charter operators in the Weipa and Cooktown TRCs had alternative income. Operators were less likely to own their own home in the Weipa, Port Douglas and Cairns TRCs.

Results also show that no operators from the Karumba TRC had completed their formal education to Year 12, and those in the northern TRCs, such as Port Douglas, Thursday Island and Weipa, were less likely to have completed Year 12 than those further south. Interestingly, charter operators in the northern TRCs such as Karumba, Weipa and Thursday Island, as well as those in the Airlie Beach and Hervey Bay TRCs were more likely to use a business plan.

Charter operators with the largest families were found in the Brisbane and Hervey Bay TRCs, although the Cairns TRC had the most family members in total. Those charter operators with the highest average income from charter fishing lived in the Mooloolaba, Port Douglas and Townsville TRCs.

While the social and financial profiles of charter fishing businesses may be of interest in their own right, they are most useful when developed further in terms of indicators of sensitivity to change. For instance, characteristics such as age, income, and years in the industry can be used to describe the sensitivity of businesses and fishers to changes in fisheries policy or changes that affect the quality of the resource. 'Indicators of sensitivity to change' will be developed in future reports in this research series.

Table A. Summary of Charter Fishing Business Characteristics for each TRC.

TRC	Number of Businesses	Number of Employees	No. of Days Chartered	Years Owned Business	Mean No. of Boats	Mean Boat Length	Mean GVP (\$'000)	Total GVP (\$'000)
Karumba	8	12	573	2.7	1.2	6.6	50	396
Weipa	8	15	439	1.6	1.0	7.4	50	396
Thursday Island	6	27	720	4.6	2.2	8.4	65	429
Cooktown	6	24	443	3.6	1.2	7.5	65	429
Port Douglas	15	47	1,722	8.0	1.0	16.0	325	4,719
Cairns	40	86	5,340	7.5	1.3	9.7	122	4,818
Townsville	20	29	1,690	6.5	1.1	8.6	70	1,389
Airlie Beach	8	71	1,027	4.3	3.0	15.6	233	1,848
Mackay	11	47	1,751	13.2	1.1	20.4	278	2,937
Gladstone	28	85	2,993	12.6	1.3	17.8	233	6,468
Hervey Bay	17	48	2,098	5.2	1.3	12.1	108	1,848
Mooloolaba	20	57	1,312	5.3	1.6	12.4	120	2,376
Brisbane	42	44	1,365	7.1	1.4	10.5	72	1,716
Southport	31	66	3,298	5.6	1.3	7.9	97	3,333

Table B. Summary of Charter Operator Characteristics for each TRC.

TRC	Mean Age	Years in Town	Years in Industry	% Employed Elsewhere	% Own Home	% Year 12 Education	% Use Business Plan	Percent Married	Family Size	Total Family Members	Av. Income (\$'000)
Karumba	44.0	4.4	5.1	83.3	50.0	0.0	83.3	66.7	2.5	15	36
Weipa	44.3	9.9	10.3	100.0	0.0	33.3	83.3	83.3	2.5	15	16
Thursday Island	44.0	9.6	10.0	20.0	60.0	40.0	80.0	60.0	2.5	10	16
Cooktown	45.6	8.7	6.0	100.0	80.0	60.0	20.0	100.0	3.4	17	5.5
Port Douglas	45.9	14.7	12.6	20.0	22.2	22.2	37.5	77.8	3.3	30	39
Cairns	42.2	18.7	12.8	26.7	36.7	41.4	40.0	83.3	2.9	83	34
Townsville	43.3	24.1	10.5	40.0	53.3	46.7	46.7	86.7	2.9	43	39
Airlie Beach	42.3	8.9	8.1	40.0	40.0	40.0	80.0	100.0	2.8	14	34
Mackay	55.8	28.7	16.8	42.9	57.1	42.9	57.1	85.7	3.3	20	31
Gladstone	46.4	23.9	15.4	42.9	71.4	55.0	38.1	81.0	2.9	60	21
Hervey Bay	49.3	10.7	8.6	46.2	69.2	53.8	84.6	84.6	3.8	50	26
Mooloolaba	42.7	19.9	7.9	57.1	57.1	60.0	60.0	93.3	3.3	50	47
Brisbane	47.8	26.8	11.8	50.0	58.8	55.6	61.1	94.4	4.0	72	30
Southport	46.0	20.8	9.5	45.8	41.7	50.0	65.2	100.0	3.2	76	30