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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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Contents

TRC Profiles

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 Cookown 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

1. Introduction

This report is the first phase of a social assessment research project which examines the charter fishing industry in Queensland. It forms the third report of a set of three. The first report examines the commercial fishing industry in Queensland, which includes the trawl, line fishing, net and crab fisheries. The second report examines the harvest fishing industry, and this report examines the tourism fishing-charter industry (Figure 1.1). These reports provide a descriptive overview of the social and financial characteristics of Queensland's commercial fishing industries, the harvest, and charter fishing industries. They summarise the findings of survey research undertaken with each industry using a recently developed framework for social assessment in natural resource management known as Town Resource Cluster (TRC) Analysis.

Further research the fisheries social assessment research project will (a) develop specific social indicators of vulnerability and sensitivity to change using survey research data in this report and additional secondary data and information, and (b) a more detailed assessment and analysis of the location and patterns of marine resource use as identified in the current survey research and by assessing fishing industry log book data (Figure 1.1).

In addition, much of the social profile and financial information in this report is being developed into a database which allows specific queries about the use of fisheries resources (Figure 1.1).

The current reports are the first phase of the fisheries social assessment research project. The report, presents social assessment profiles of the fishing industry and employees within the industry. It has not been developed to assess the social and financial impacts of any specific future changes in fisheries management, but simply provides descriptive profiles which may be useful in understanding how changes may impact on coastal communities and the fishing industry.

This report has several chapters:

Chapter 2: An overview of social assessment and the application of Town Resource Cluster Analysis (TRC-Analysis) in natural resource management.

Chapter 3: A description of the survey research methodology used in the current study
Chapter 4: A description of the Town Resource Clusters (TRCs) and their identification.

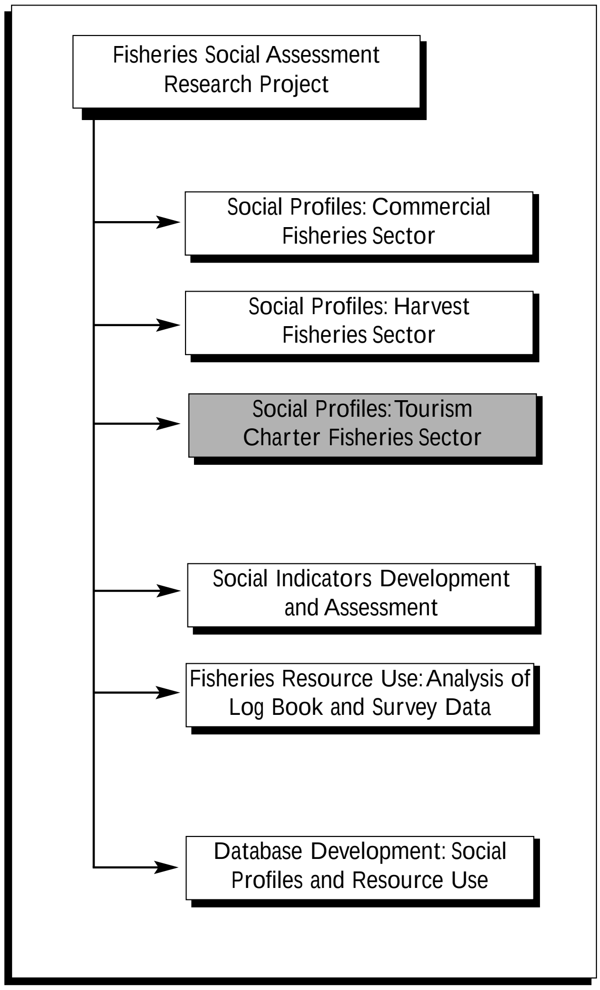

Figure 1.1 Social Assessment Research Projects

Chapter 5: A description of the social profiles of the charter fishing industry on a statewide basis and a comparison of profiles across the identified TRCs.

Chapter 6 - 19: A description of the social and financial profiles of the charter industry within each of the TRCs.

2. Social Assessment and TRC-Analysis

This chapter is a brief overview of social assessment in natural resource management. It describes steps in social impact assessment and the use of TRC-Analysis as a framework for organising social assessment information in a resource management context.

Social Assessment

Social Assessment is an applied interdisciplinary field that emerged within the social sciences. Social impact assessment methods are tools used to predict the future effects of proposals on people, i.e. their way of life (how they live, work and interact with each other); their culture (norms and traditions); and their community (institutions and structures) (Armour, 1990).

To date, there is no generic method that can be used to identify and predict the social impacts associated with development proposals or changes in land and marine use or management. In addition, social impact assessment is a distinct process, in terms of its methodology and objectives to economic impact assessment. While there is considerable interaction between economic and social impacts, they are nevertheless distinct fields with different techniques, methods and objectives.

Although there is no generic method applicable to social impact assessment, the process has a number of procedural steps or stages which include:

1. Assessment
   1.1 Scoping
   1.2 Profiling
2. Prediction
3. Mitigation
4. Monitoring

The assessment component identifies the potential impacts of a proposal or project before the change has actually taken place. In other words, social assessment attempts to predict the likely impacts, at a community, individual and family level, that may result from some specific change. The assessment phase consists of two key activities: scoping and profiling.

Scoping identifies important issues that relate to the proposed change and determines the timing, depth and extent of analysis that may be required. This entails selecting variables necessary for social analysis; identifying possible and likely social impacts (both positive and negative); and identifying the geography or boundaries of any potential impacts. Scoping is one of the most important activities in the social assessment process because it focuses the assessment on issues of immediate relevance and importance to stakeholders and communities.

Profiling describes the social environment in order to provide a basis for assessing and understanding potential changes. Profiling may be used to develop a more detailed understanding of the demography of the area through the use of social indicators and the analysis of census data, or it may be used to describe the historical changes and processes that have occurred within the community. Profiling may also be used to identify contemporary issues within communities and to better understand the political and social structures that exist within a community or region.

After collecting detailed information about a particular community or region, the prediction component of social assessment uses existing information and social data to identify impacts that may result from the change. This can be achieved through different participatory mechanisms, such as discussions or interviews with community residents, community workshops and/or surveys, or through more quantitative social assessment techniques such as multi-criteria analysis or computer modelling. These impacts are evaluated to determine the probability of occurrence, the importance of impacts to those affected and the distribution of impact across groups and geographic areas.

As with any type of change, some individuals or groups within the community may benefit, while others may experience costs. If negative impacts are predicted, it is the role of the social impact assessment to determine how such impacts may be ameliorated or mitigated to produce the minimum degree of social disruption to those affected.

Monitoring is also a key component of the social assessment process. For any particular project or policy, a monitoring program should be developed to identify deviations from the proposed action, and to document any unanticipated impacts that may arise when a policy process or change is implemented. It is only through detailed monitoring that future predictions of impact can be enhanced.

One of the critical questions that confronts any social assessment process concerns the unit or units of analysis that are used in the assessment. Depending on the context and the objectives of the social assessment process, it may be appropriate to undertake the assessment at different institutional levels such as that of family, industry, stakeholder interest groups or through grouping specific types of resource users. Indeed, within a single social assessment process, the unit of analysis may vary depending on the specific research objectives that are to be addressed.

When undertaking a large scale regional social assessment process, one of the core questions that arises is that of defining community. In the context of a large regional social impact assessment, should community be defined in terms of a single town, hamlet or regional area? In a regional context, where changes may occur in the use of natural resources, a direct impact on one town may have consequent and flow-on impacts on other towns in the region. In this example, should community be defined as a collection of inter-dependent towns within a region? If this is the case, then questions arise as to how we define the boundaries of community and distinguish one community, or collection of towns or communities from another? This issue is one of the more basic questions underlying social impact assessment. It again focuses on what the appropriate 'unit of analysis' is in the social impact assessment process.

This overview of the social impact assessment emphasises that there are multiple stages or processes within the assessmen. Therefore the current study is not a complete social impact assessment, but simply one component of it. It is part of the profiling phase of the social assessment process, where communities and their relationship to marine fishery resources are defined and described.

The information in this report is a first step if potential social impacts associated with changes in fisheries resource use and management are to be understood. Through the framework of TRC-Analysis, this report provides 'baseline' descriptive information about the commercial fishing industry in coastal communities and the relationship between these communities and areas of fisheries resource use.

The report may provide useful information in understanding who might be impacted by future changes in fisheries resource use or management and the regional and community locations of these impacts. However, this study does not constitute a complete social impact assessment. Given a specific change in fisheries resource use or management, additional social assessment research will be required and would be based not only on the quantitative assessments as presented in this report but often extensive qualitative and participatory research with those potential affected within communities. The current report provides information on which to base more extensive and focussed social impact assessment research and participatory programs where required.

Town Resource Cluster Analysis

TRC-Analysis is a methodological framework for examining the social impacts of changes in resource use or management in a regional planning context. The approach is based on several core conceptual and methodological principles, but may be modified to meet the needs of specific impact assessment and resource management contexts (Fenton, in press). TRC-Analysis is not an alternative to any specific and established social impact assessment techniques. It provides a framework in which existing assessment techniques maybe usefully included and embedded.

Objectives of TRC-Analysis

There are three core objectives of TRC-Analysis, which include (i) the identification of Town Resource Clusters (TRCs), (ii) an assessment of the relationship of TRCs to specific areas of natural resource, and (iii) a description of TRCs in relation to specific indices of vulnerability, resilience or sensitivity to change.

Resource Dependency

Resource dependency indicates a relationship between social and resource systems, to the extent that the maintenance of social systems are in some way reliant on one or more resource systems. Previous research undertaken in resource dependent communities (see for example Randall & Ironside, 1996 for a review of this research) adopted a similar definition of resource dependency. However, resource dependency is only one component of the relationship between social systems and broader environmental and resource systems.

In the marine environment, resource dependency may include extractive use of the resource (ie., fishing, hunting, mining) or non-extractive use of the resource (ie., specific leisure, tourism and recreational uses) (Figure 2.1). In addition, the relationship to social systems may be more broadly focussed on environmental rather than resource systems. Therefore, the relationship between social and environmental systems may be defined in terms of the associations people have with the marine environment, which may include symbolic and place meanings as well as specific environmental values.

The current research focuses on one component of the relationship between social and marine environmental systems. While the research focus is on the dependency of social systems on marine fisheries resources, the TRC-Analysis framework also enables broader environmental associations, meanings and values to be examined.

In understanding the relationship between social and resource systems within the context of resource dependency, there are three core issues that need to be examined. The first issue concerns the issue of defining the social system. In the context of TRC-Analysis as a regional planning framework this essentially becomes a question of defining community for the purpose of identifying some level of resource dependency. The second question concerns how we define the resource and the geographic location of the resource. Finally, and given some operational definition of both community and resource, there is a need to describe the 'linkage' between the resource dependent community and the resource itself.

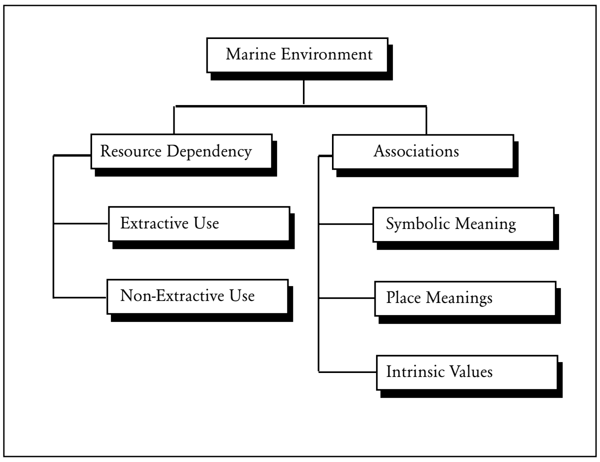

Figure 2.1 Resource Dependencies and Associations

Resource Dependent Communities

TRC-Analysis aims to define meaningful spatial units on which to ground later social impact and assessment processes. Such locationally and geographically distinct social units are referred to as Town Resource Clusters (TRCs). Many natural resource management units used by natural resource management agencies are clearly defined on the basis of specific ecological and resource management characteristics, but there is no corresponding unit associated with the social environment. Without a locationally distinct unit which defines the social environment, any attempt to understand social and community processes, particularly in the context of natural resource management will be fragmented and disparate (Murphy, 1991).

In defining resource dependent communities, there is an issue of what defines community. There is also an issue of defining communities which are at some level identified as resource dependent. In the first instance, conceptual and methodological issues associated with the definition of community continue to be problematic and depending on the research context, and often issues of data availability, community has been defined in various ways from town to county or Local Government Area to regions (Machlis & Force, 1988; Machlis, Force and Balice, 1990). More meaningful boundary definitions are required in relation to community. Definitions of community should be meaningful in relation to prevailing social structures, levels of community organisation and interdependence. They should not be defined purely on the basis of convenient administration boundaries or data availability.

Machlis & Force (1988) suggested that to better understand resource dependent communities, community may need to be considered as a hierarchical or nested concept. This approach is similar to that considered in central place theory (Fairbairn and May) where in a regional context, a network of central places or towns exist in relation to specific trade areas and the supply and consumption of goods and services. As Cramer, Kennedy, Krannich & Quigley (1993) have emphasised in the context of timber production and natural resource dependency, changes in resource availability often lead to "chain reactions...affecting not only loggers and mill workers, but businesses, social services and people not generally involved in timber production" (p. 477).

A recognition of the 'mutual interdependence' of communities and townships in a regional resource planning and management context is given in Mayfield's (1996) study on the relationship between small farms and the location from which farm goods and services were purchased. This research suggested significant micro-economic and financial interdependence among farming communities. Through better understanding the interdependencies amongst communities, clusters of mutually interdependent townships (Town Resource Clusters) can be identified, providing a more appropriate theoretical and conceptual rationale for defining community.

This approach defines community as what is commonly referred to as social catchments, which are interdependent towns and communities dispersed throughout a region. The towns, at the same time, can also be hierarchically arranged as is the case in central place theory. Based on previous research in several natural resource management contexts (Fenton, 2000, 1999a, 1999b, 1998) the interdependencies among towns were defined on the basis of (a) the location of business purchases, (b) the location of purchases of household goods and services and (c) the location from which social infrastructure services and facilities were used. This locational information was used as the basis for identifying clusters of towns and communities which are referred to as Town Resource Clusters (TRCs).

In the current study, the description of communities by the identifying Town Resource Clusters (TRCs) used locational information from survey data collected from interviews with commercial fishers. Therefore, the number of fishing businesses and location of their use of services and facilities, and purchase of goods and services, was used to define the TRCs. Although the TRCs were defined within the context of commercial fishing, these TRCs are probably relatively constant across industry groups and sectors within the community. Distance between townships plays a significant role in the use of services and the purchase of goods and it is unlikely that there would be significant variation across different industry and occupational groups.

The Resource

Much research has focused on the resource dependent community, and not on issues related to the resource itself. The resource is often defined in terms of a simple resource typology, to the effect that communities are dependent upon fishing, native timber harvesting, mining or agriculture. Concurrent consideration given to defining and describing resource systems on which communities depend is also needed. This requires considerable integration of conceptual and theoretical approaches between the social and natural sciences. Typical of such an integrative approach is research on social and ecological resilience (Adger, 2000) where consideration is given to defining resilience within social and resource systems, and to how changes in the resilience of either systems may impact alternate systems.

Questions also arise about defining the resource on which communities depend. This is particularly the case in resource contexts such as fishing, forestry and the use of water resources where the resource itself may be dispersed throughout a geographic area.

In the management of natural resources, geographic areas are often delineated. For instance, in the management of water resources, specific water catchments are often geographically defined. Forest resources are often defined on the basis of Forest Management Areas, timber supply zones or other resource-based units. Marine resources on the Great Barrier Reef are delineated by a zoning system which specifies the permitted use of reef resources. Similarly, several states manage their natural resources on the basis of spatially defined biogeographic regions which encompass the entire state.

There were no a priori regional classifications of marine coastal areas in Queensland to assist in defining the spatial extent of the resource. Therefore, the spatial extent of the marine resource used for commercial fishing was defined on the basis of the use of the resource by the commercial fishing businesses. Information drawn from interviews with commercial fishers on the location of resource use was recorded on a 15-minute grid overlay. Each 15 minute grid provided information about the number of commercial fishing businesses using the resource.

For Queensland as a whole, the analysis of information within the 15-minute grids provided information about the density of fisheries resource use within specific areas. However, it was also important to examine the spatial extent and density of fisheries resource use to each of the defined TRCs. Analysis of resource use among fishers from each TRC provided consistently meaningful spatial patterns of resource use associated with each one. In all cases and based on the count of fishing businesses using an area, resource areas of high, moderate and low use were identified. In the majority of cases, 15-minute grids with high use were spatially proximate and adjacent, as were grids associated with moderate use. Areas of high use associated with each

TRC were referred to as primary resource catchments, while areas of moderate resource use were referred to as secondary resource catchments.

Resource Dependent Linkages

Another objective of TRC-Analysis is to establish a relationship between the use of natural resources and specific Town Resource Clusters (TRCs). This allows an understanding of what communities and townships are likely to be affected by changes in the management and use of natural resources and to determine the values that individuals and groups place on particular resource areas. As such, this establishes a core 'linkage' between the natural resource and the TRC, such that given a change in the status of the natural resource, the probable location of any potential social impacts and changes may be clearly identified.

Defining a TRC and understanding the spatial location of the primary and secondary resource catchments associated with the TRC provides a better understanding of how changes in the resource system may impact on associated social systems and conversely how changes in the social system may impact on resource systems.

Figure 2.2 shows the linkage between the natural resource and the TRC. On the one hand, changes in natural resource management may have identifiable impacts on specific TRCs, given the identified dependency of communities within the TRC on specific areas of natural resource (ie., primary and secondary catchments). Conversely, knowing the characteristics or profiles of communities within TRCs, and in particular their level of sensitivity to change and their resilience to change, can provide important information along with environmental and ecological criteria to assist in the management of areas of natural resource. The TRC represents the social unit in which potential social change may be identified and managed.

Identifying social units (TRCs) and concurrently understanding the relationship or level of dependency between the TRC and areas of natural resource enables managers to better consider the social impacts and consequences of changes to natural resource management.

Although dependency on fisheries resources is the focus for the current TRC-Analysis, there are nevertheless other significant social and community relationships with the marine environment as discussed earlier and as shown in Figure 2.1. The current study has only examined marine resource dependency of specific communities, and in particular dependency as defined through extractive resource use based on the commercial fishing industry. In understanding the broader linkages between communities and the marine resource other forms of marine resource dependency would need to be examined as well as the specific associations between individuals and groups in communities in relation to the marine environment.

Describing Town Resource Clusters

Defining a TRC and its associated primary and secondary resource catchments provides the framework to develop further social impact assessment procedures including community involvement programs and the use of additional quantitative social assessment techniques. For instance, community involvement programs can be more effectively directed at those communities where a known relationship exists between the area of resource use and the community.

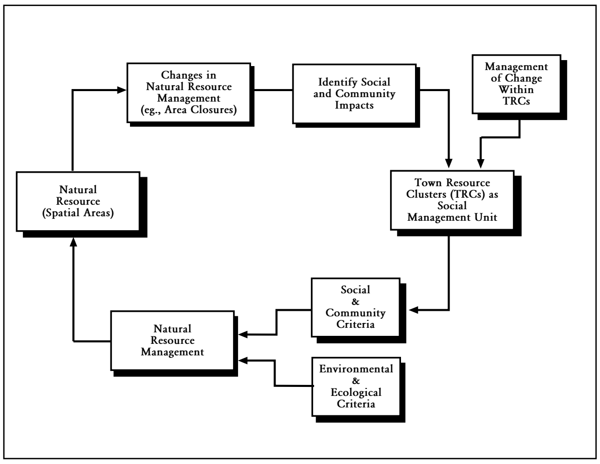

Figure 2.2 Social Assessment Research Projects

Ecosystems within the primary and secondary resource catchments can be described by ecological indicators, such as those of ecosystem health, resilience and biodiversity. Such descriptions are important in monitoring the condition of ecosystems and evaluating the impact of human activities.

TRCs and communities within TRCs can be described using a range of social indicators. Of particular importance in this context is the description of TRCs on the basis of indicators which provide information on resource dependency and social resilience or sensitivity to change. Although such social indicators are not developed, analyzed and presented in the current report they are nevertheless an important part of the current research program (Figure 1.1) and will be developed in a later research report.

The current study has collected considerable social and financial profile information about harvest businesses within TRCs. The profile information provides research information for a variety of uses. The information collected in developing of profiles can also be used later to develop social indicators of resource dependency, social resilience and sensitivity to change.

The current study adopts a TRC framework for undertaking social assessment of the charter fishing industry in Queensland. This report is the first stage in this assessment which includes basic descriptive information to identify and describe TRCs. Within the TRC framework this report (a) identifies specific TRCs, (b) identifies primary and secondary resource catchments associated with TRCs and (c) provides basic profiles of fishing businesses and employees within the defined TRCs.

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3. Research Methodology

Given the paucity of social information about the charter fishing industry in Queensland, primary data collection through survey research was required to develop basic social, demographic and descriptive profiles of fishing businesses.

Questionnaire Design

The questionnaires used in this study were based on questionnaires used to assess change in forest resource management in Victoria and Queensland (Fenton, 1998, 1999). Although questionnaires used in previous studies had been designed for self-completion, the questionnaires used in the current study were designed to be completed through telephone interviews. The questionnaire was administered to tourist charter businesses licenced to fish in Queensland. It sought information about the charter fishing business, and social and demographic characteristics of the charter operator and their family.

Charter Business Questionnaire

There were approximately fifty questions, in three sections, in the questionnaire. In the first section, charter operators with a fishing license were asked about their business and fishing practices. This included questions on the location of their homeport, years of business operation, number of boats, size of boats, type of fishing activity, seasonal variations in fishing, number of employees, the value and location of sales, and the town locations for business expenditure.

The second section of the questionnaire included questions about the location of resource use and the use of coastal ports when accessing different areas of resource use. When asking questions about the location of resource use interviewers used detailed coastal maps to assist in the identification of areas of resource use, with resource use often being identified in relation to specific reefal areas or in relation to specific towns along the Queensland coast.

In the third section of the questionnaire, all owner-operators were asked for information in relation to their town of residence, years of residence, hours worked in the industry, usual months in which they worked in the fishing industry and the location of towns from which they purchased household goods and services. This section also included questions which provided information about the social and demographic profiles of charter operators and their families, including the age, gender, marital status, housing tenure and educational levels of family members.

Specific and detailed questions relating to the financial characteristics of the charter business were not included in the current survey, because the Queensland Department of Primary Industries had also conducted an economic survey of fishing businesses within Queensland over a comparable time period.

Questionnaire Pre-testing

Before conducting interviews, the questionnaires were pre-tested with members of the charter industry. A small number of owner-operators were asked if they could assess the questionnaire in terms of the appropriateness of the questions and the terminology used in the questionnaire. The questionnaire was also reviewed by staff at the Great Barrier Reef Marine Park Authority.

Perhaps the most difficult question required charter-operators to recall the location of their fishing activities over the previous 12 months. This information had to be recorded at a sufficient detail through a telephone interview so that it could be transferred with reasonable accuracy to a 15-minute grid overlay. The pre-test indicated this was possible and that accuracy could be improved by ensuring that all interviewers had detailed coastal maps available to them when asking questions about the location of resource use.

Survey Sampling and Administration

The objective of the sampling procedures was to obtain a full census of all charter fishing businesses in Queensland as identified in the database. The Queensland Fisheries Service provided a list of 287 names, addresses and telephone numbers of charter operators. Due to the ‘dynamic’ nature of contact databases, it was not possible to contact all charter-operators because many contact details, including addresses and telephone numbers, were either out of date or incorrect.

During the evenings, weekends and occasionally weekdays of August 1999 to April 2000, trained interviewers contacted operators and made appointments for interviews at convenient times. The response was recorded as either: surveyed, refused, unable to be contacted, or insufficient contact information. Considerable effort was made to locate each charter-operator identified in the database. The questionnaire took approximately 30-45 minutes to complete, depending on the extent to which individual owner-operators wished to discuss specific issues.

Charter-operators were informed of the research prior to being interviewed. All received a letter by mail informing them of the study and inviting them to participate. The research was also advertised in the AMPTO newsletters before commencing the interviews.

Questionnaire Response Rates

The characteristics of the charter fishing industry make it especially difficult to contact owner-operators, because many may be away for extended periods.

Table 3.1 shows the response rate and characteristics for the survey of charter fishing businesses in Queensland. A total of 199 questionnaires were completed. This represented a response rate of 94.8% of owner-operators who could be contacted. 18.7% of fishers on the database could not be contacted because of incorrect phone numbers, they were away at sea or there was no answer when they were called (Table 3.1).

Of the 287 licence holders, 25 (8.6%) were considered latent licence holders. There was 1 (0.3%) licence holder who was deceased and 22 (7.7%) licence holders who reported they were no longer in business or had retired, as well as the proportion of those that were non contactable and assumed latent (0.6%). For the purpose of further analysis, it was assumed there are 257 active fishing charter licences in Queensland.

Table 3.1. Response Rates: Commercial Fishing Businesses

Response	Frequency	Percent
Completed Questionnaires	**199**	**69.3**
Incorrect phone number	29	10.1
No answer to telephone	23	8.0
Deceased	1	0.3
No English	1	0.3
Total Unable to Contact	**54**	**18.7**
No longer in business or retired	22	7.7
Total Not in Industry	**22**	**7.7**
Refusal	12	4.2
Total	**287**	**100.0**
Response Rate[1]		94.8
Industry Representation[2]		77.3

Note: [1]*The response rate is the number of completed questionnaires to the total number of businesses excluding those unable to be contacted or those not in or new to the industry.*

[2]*Industry representation is the number of completed questionnaires to the total number of businesses excluding those deceased and those no longer in business or retired.*

Fenton, D.M. (1999). Forest industry activity and linkages for the West CRA region. Report prepared for the Social Assessment Unit, AFFA, Canberra.

Fenton, D.M. (1998). Resource, Forest Industry and Employee Catchment Analysis for the South East Queensland RFA Region. Report prepared for the Department of Primary Industries and Energy (Canberra).

4 Identification of Town Resource Clusters

Identification of TRCs

Town Resource Clusters (TRCs) represent clusters of mutually interdependent towns or communities which have a relationship to a specific geographic region or area of marine resource use.

The identification of TRCs was based on the homeports of charter fishing businesses, as reported in Part A (Fenton and Marshall 2001). It was considered that much of the business expenditure, the residential location of employees, the household expenditure patterns of employees and the use of social infrastructure services among employees would centre around the homeports of these businesses.

An examination of all homeports of businesses indicated that the majority of fishing businesses were located in major regional and sub-regional centres on the Queensland coast. In some instances, suburbs within the regional centre were identified as the homeport. However, suburbs were classified as part of an identified regional centre on the basis of the Australian Bureau of Statistics definition of urban centres and localities.

Table 4.1 and Figure 4.1 identify the major regional centres used by charter-operators as homeports. It is these regional centres which have been used to define the TRCs. Where the homeport of a business was not located within a major regional centre, the location of business expenditure and the residential town location of the business operator was used to classify the business within a TRC. Many of the TRCs consisted of a major regional centre in which the majority of businesses were located and smaller towns and communities surrounding the regional centre in which other businesses were also located.

As shown in Table 4.1, this procedure classified 100% of charter businesses within a TRC.

Table 4.1 Charter Businesses in TRCs

TRC	Frequency	Percent
Karumba	6	3.0
Weipa	6	3.0
Thursday Island	5	2.5
Cooktown	5	2.5
Port Douglas	11	5.6
Cairns	30	15.1
Innisfail	1	0.5
Lucinda	1	0.5
Townsville	15	7.6
Airlie Beach	6	3.0
Mackay	8	4.0
Yeppoon	4	2.0
Gladstone	21	10.6
Bundaberg	4	2.0
Hervey Bay	13	6.5
Maryborough	1	0.5
Tin Can Bay	3	0.5
Mooloolaba	15	7.5
Brisbane	19	9.6
Southport	25	12.6
Total Charter Businesses	**199**	**100.0**

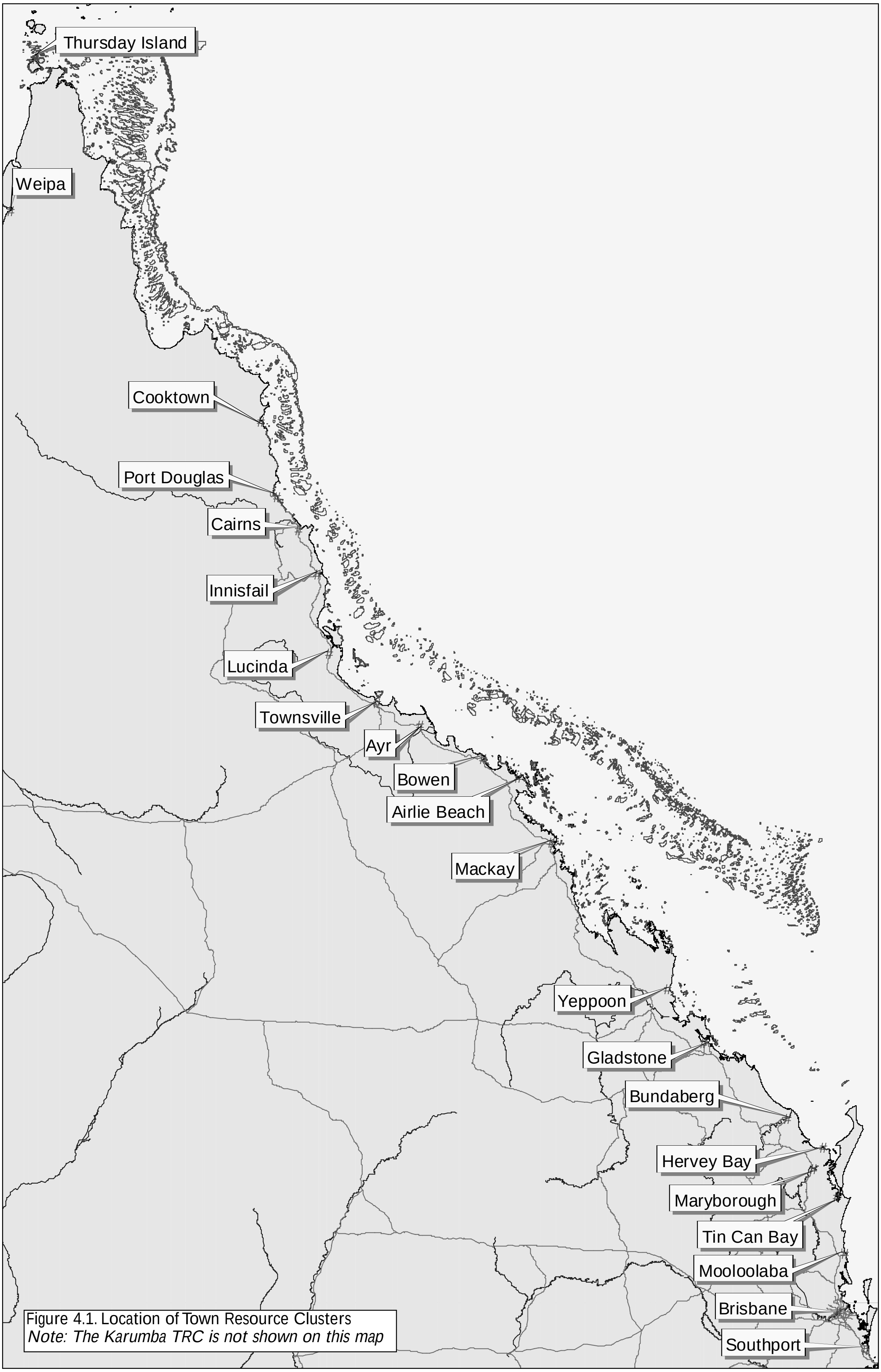

Figure 4.1. Location of Town Resource Clusters
Note: The Karumba TRC is not shown on this map

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

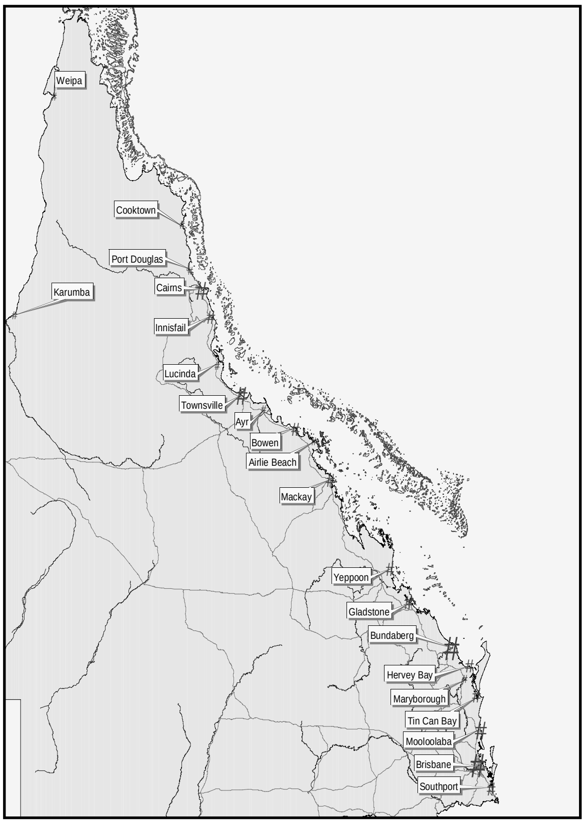

Figure 5.1 Location of Charter Businesses within TRCs

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 Mean % of time	Ext. trips
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

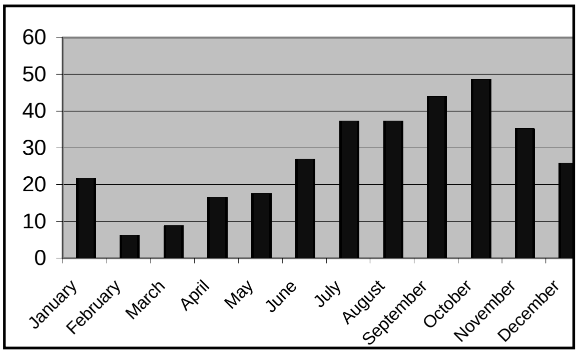

Figure 5.2 Seasonal Variation in Charter Activity

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.

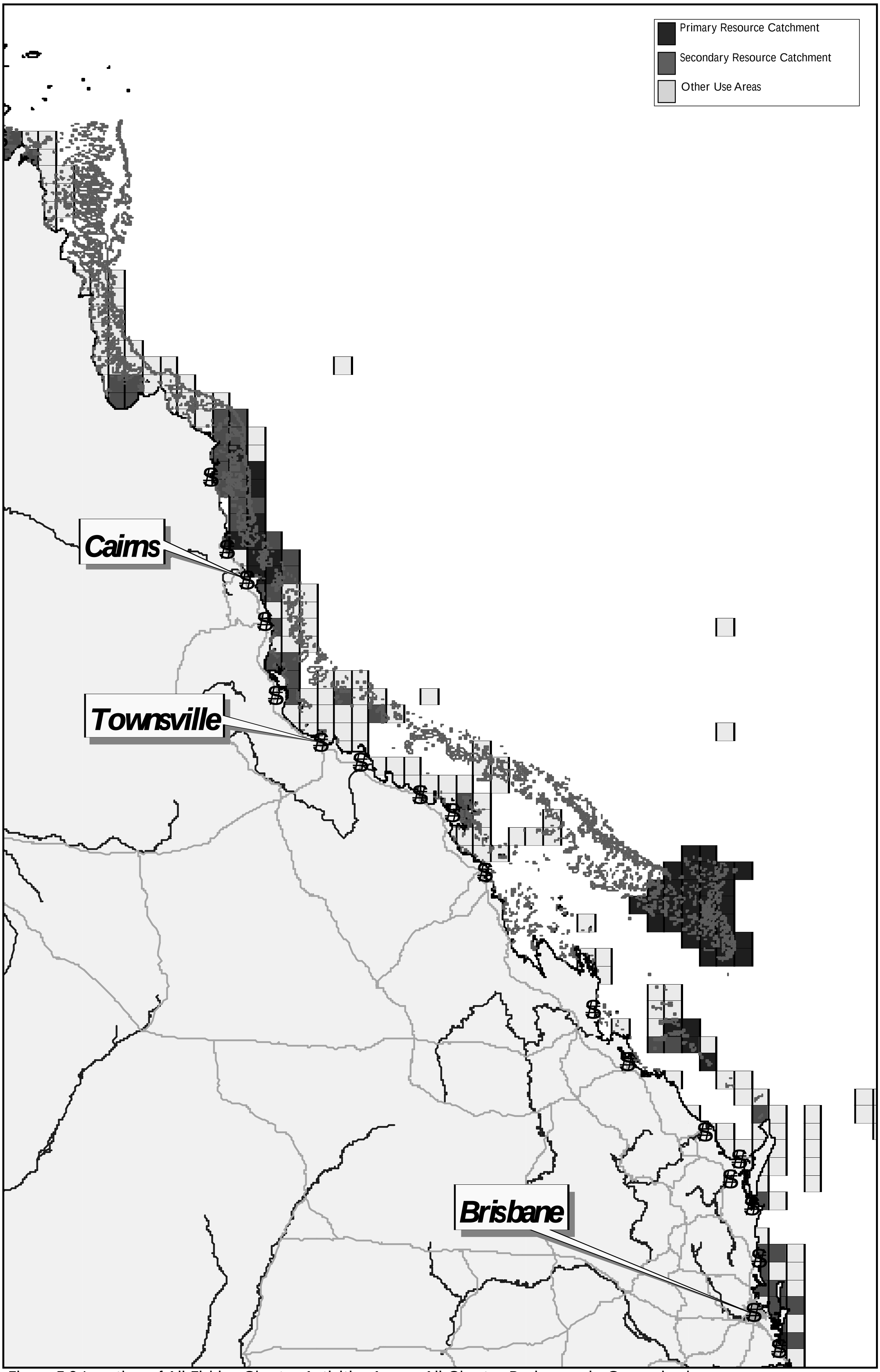

Figure 5.3 Location of All Fishing Charter Activities Across All Charter Businesses in Queensland.

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.

6 KARUMBA TRC

The Karumba TRC consists of the towns of Karumba, Normanton and Burketown located in the southern Gulf of Carpenteria.

BUSINESS PROFILES

Location and Use of Ports

Table 6.1 shows the number of license holders within the Karumba TRC and the number of survey respondents who reported having homeports within the Karumba TRC. Based on the basis of the sample count, it is estimated that there were 8 charter operators within this TRC, with homeports in Karumba (71.4%), Normanton (14.3%) and Burketown (14.3%). We can be 95% certain that the population count within the TRC is between 3 and 13. Figure 6.1 shows the geographic location of the Karumba TRC.

Table 6.1 Location of Homeports

Town	Adj. Database Count	Sample Count	Estimated Count	Percent TRC
Karumba	4	4	5.3	71.4
Normanton	2	1	1.3	14.3
Burketown	1	1	1.3	14.3
Total TRC	7	6	8	100
95% Confidence Interval for Estimated TRC Count				3-13
Percent of Total Active License Holders in QLD				3.0%

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 6.2 shows the types of fishing activity on charter operations from the Karumba TRC over the previous year for those charters that were predominately fishing-charters. Charters were undertaken as day trips, overnight trips or extended trips. On day trips, the main fishing activities were estuary fishing (63%) and reef fishing (36%). On overnight trips, reef fishing was the only fishing undertaken and on extended trips, estuary fishing was the only fishing undertaken.

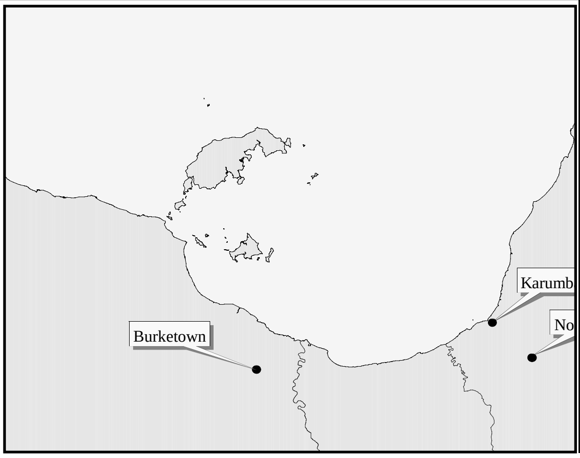

Figure 6.1 Location of the Karumba TRC

Table 6.3 shows the number of day trips, overnight trips and extended trips, and the percentage of trips that were chartered primarily for fishing, over the previous year. Most charters from the Karumba TRC were day trips (551 days), and 98.7% of day trips were predominately fishing-charters. All overnight and extended charters from the Karumba TRC were fishing charters. The charter industry in the Karumba TRC is more oriented around fishing than the average Queensland day charter (70.2%), overnight charter (62.0%) and extended charter (66.1%).

Table 6.4 shows the percentage of time spent fishing and doing other activities such as diving and cruising, on charters where fishing was not the only activity. On day trips, fishing represented 47.5% of activities. Sightseeing was only a small component of day trips (2.5%), and other activities such as transportation, drop-offs (etc.) made up the rest of the activities (50%). Overnight trips and extended trips for activities other than fishing were not undertaken in the Karumba TRC.

Table 6.5 shows that the peak months for charter activity within the Karumba TRC were May, June, July and August. This was an earlier season than the the average Queensland peak season, which was from July to November.

Location of Resource Use

Figure 6.2 shows the location of resource use by charter operators in the Karumba TRC. The main location of resource use was directly adjacent to Karumba, with some use around Mornington Island.

Table 6.2 Type of Fishing Activity (during the last 12 months)

	Day trips		Overnight trips		Extended trips	
Fishing Type	Mean % Time within TRC	Mean % Time QLD	Mean % Time within TRC	Mean % Time QLD	Mean % Time within TRC	Mean % Time QLD
Reef (bottom fishing)	36.0	47.5	100.0	66.0	0.0	51.2
Game (pelagic)	1.0	18.8	0.0	20.3	0.0	31.1
Estuary	63.0	26.8	0.0	11.6	100.0	12.5
Crabbing	0.0	0.5	0.0	0.2	0.0	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

Table 6.3 Number of Charter Trips (during the last 12 months)

Type	Mean within TRC	QLD Mean
Day Trips		
Mean number of day-trips (per business)	91.8	85.3
Mean number of fishing-only day-trips	90.7	59.9
Total number of day-trips	551	16,976
Total number of fishing-only day-trips	544	11,919
Percentage fishing-only trips	98.7%	70.2%
Overnight Trips		
Mean number of overnight trips (per business)	0.8	5.39
Mean number of fishing-only overnight-trips	0.8	3.34
Total number of overnight trips (x2 days per trip)	10.0	1,072
Total number of fishing-only days on overnight trips	10.0	665
Percentage fishing-only trips	100.0%	62.0%
Extended Trips		
Mean number of extended-trips	4.2	6.9
Mean number of fishing-only extended-trips	4.2	4.5
Total number of days on extended-trips	12.5	6,881
Total number of fishing-only days on extended trips	12.5	4,385
Percentage fishing-only trips	100.0%	66.1%
Mean number of days away (per business)	104.3	121.3
TOTAL days charter	573.5	24,929
Percentage of charter spent fishing	98.8%	68.1%

Table 6.4 Charter Activities

Type	Within TRC	QLD Mean
Day Trips		
% time spent fishing	47.5	52.9
% time spent diving/snorkeling	0.0	13.1
% time spent cruising/sightseeing	2.5	17.5
% time spent sailing	0.0	0.4
% time spent whale & dolphin watching	0.0	4.2
% time spent doing other activities	50.0	11.9
Overnight Trips		
% time spent fishing	0.0	51.2
% time spent diving/snorkeling	0.0	22.9
% time spent cruising/sightseeing	0.0	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	0.0	51.2
% time spent diving/snorkeling	0.0	31.1
% time spent cruising/sightseeing	0.0	12.5
% time spent sailing	0.0	0.6
% time spent whale & dolphin watching	0.0	0.0
% time spent doing other activities	0.0	4.6

Table 6.5 Peak Charter 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	1	16.7	17.6
June	3	50.0	26.9
July	6	100.0	37.3
August	4	66.7	37.3
September	0	0.0	44.0
October	0	0.0	48.7
November	0	0.0	35.2
December	0	0.0	25.9

Charter Industry Businesses

Table 6.6 identifies the number of employees in the charter industry for the Karumba TRC. All businesses had between 1 and 3 fulltime employees. There was no part-time or casual employment. The mean was 1.5 fulltime employees per business. In total, it is estimated that there were 12 people employed in the charter industry within the Karumba TRC over the previous year.

Business Ownership and Size

Table 6.7 shows the number of years that the current owner had owned their charter business in the Karumba TRC. On average, businesses had been owned for 2.7 years, and 83.3% of businesses had been owned for less than 5 years. These businesses are relatively young since the average Queensland charter business has been owned for 7 years, some 4.3 years longer than those in Karumba.

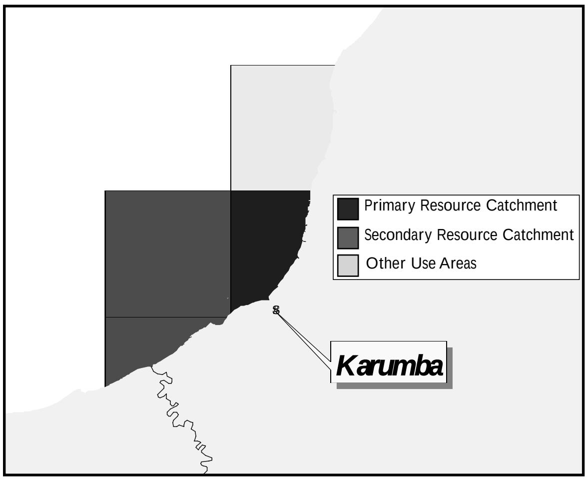

Figure 6.2 Karumba TRC: Location of Resource Use

Table 6.6 Number of Employees

Number of Charter Employees	Full-Time Count	Full-Time Percent	Part-Time Count	Part-Time Percent	Causal Count	Casual Percent
Nil	0	0.0	0	0.0	0	0.0
1	3	50.0	0	0.0	0	0.0
2-3	3	50.0	0	0.0	0	0.0
4-5	0	0.0	0	0.0	0	0.0
Total Businesses	6	100.0	0	0.0	0	00.0
Total Employees	12		0		0	
Mean Number of Employees per Business			1.5			
Mean Number of Full-time Employees per Business				1.5		
Mean Number of Part-time & Casual Employees per Business				0.0		
Estimated Number Employed within the TRC				12		

Note: Part-time and casual employment was recorded as 0.5 when contributing to total employment.
Total number of employees includes the respondent.
Estimates of total employment based on an estimated 8 charter businesses (Table 6.1)

Table 6.7 Number of Years of Current Ownership of the Charter Business

Number of Years	Sample Count	Percent within TRC	Cumulative Percent
1-5	5	83.3	83.3
6-10	1	16.7	100.0
11-15	0	0.0	0.0
16+	0	0.0	0.0
Total	6	100.0	100.0
Mean Number of Years owned or operated			2.7
Difference of TRC Mean to QLD Population Mean (7.0)			-4.3

Note: Standard errors for number of years ownership (sample = 0.7; QLD population = 0.5).

Table 6.8 shows that the average number of years the charter business had been operating was 5.6 years, with 50% operating for less than 5 years. The average Queensland charter business has been operating for 8.3 years, some 2.7 years longer than the average business in Karumba.

Table 6.8 Number of Years Business has been Operating

Number of Years	Sample Count	Percent within TRC	Cumulative Percent
1-5	3	50.0	50.0
6-10	2	33.3	83.3
11-15	1	16.7	100.0
16+	0	0.0	100.0
Total	6	100.0	100.0
Mean Number of Years owned or operated			5.6
Difference of Mean to QLD Population Mean (8.3)			-2.7

Note: Standard errors for number of years operated (sample = 1.7; QLD population = 0.6)

Table 6.9 shows the number of boats owned by charter businesses within the Karumba TRC. Most businesses operated with one boat (83.3%). The average number of boats operated was 1.2, which was similar to the Queensland average (1.3 boats).

Table 6.9 Number of Boats Operated by Charter Businesses

Number of Boats	Sample Count	Percent TRC
1	5	83.3
2	1	16.7
3	0	0
4+	0	0
Total Number of Businesses	6	100.0
Mean Number of Boats Operated		1.2
Difference of Mean to QLD Population Mean (1.3)		-0.1

Note: Standard errors for number of boats operated (sample = 0.2; QLD population = 0.06)

Table 6.10 shows the frequency distribution of the length of boats operated within the Karumba TRC. Most boats were less than 6m long (57.1%), and the remainder were between 7-10m. Boats in the Karumba TRC (average 6.6m) were shorter than the Queensland average (11.4m). The average length of the largest vessel operated (6.8m) was also significantly smaller than the Queensland average (11.7m).

Table 6.10 Length of Vessels Operated by Charter Businesses

Length of Boat (metres)	Sample Count	Percent TRC
2-6	4	57.1
7-10	3	42.9
11-14	0	0.0
15-18	0	0.0
18-24	0	0.0
24+	0	0.0
Total Number of Boats	7	100.0
Mean Length of Boats Operated (metres)		6.6
Difference of Mean to QLD Population Mean (11.4)		-4.8
Mean Length of Largest Boat Operated (metres)		6.8
Difference of Mean to QLD Population Mean (11.7)		-4.9

Note: Standard errors for mean length of boats (sample = 1.4; QLD population=0.4). Standard errors for mean length of largest boats (sample =0.7; QLD population=0.5).

Value of Production and Location of Sales

Table 6.11 shows the income of charter operations within the Karumba TRC for the twelve months prior to the survey. The profile was markedly different to the overall profile for Queensland. In the Karumba TRC all businesses earned less than $100,000, whereas 34.2% of Queensland businesses earned more than $100,000, and some (0.5%) earned more than $1m. The estimated total income from charter operations in the Karumba TRC was $396,000, which represents around 1.2% of the Queensland charter industry income.

Table 6.11 Business Income (Annual value)

Value ($,000)	Sample Count	Sample Percent	Queensland Percent
Less than $100	6	100.00	65.8
$101 - $200	0	0.0	11.5
$201 - $300	0	0.0	7.5
$301 - $400	0	0.0	4.0
$401 - $500	0	0.0	6.0
$501 - $600	0	0.0	2.0
$601 - $700	0	0.0	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	6	100.0	100.0
Mean GVP for TRC			$50,000
Estimated Total GVP for TRC			$396,000
Estimated Total GVP for QLD Population			$ 34,419,000
Percent of Total Queensland Production			1.2%

Note: Estimated TRC population total is based on the sample GVP total multiplied by the sampling fraction of 1.32 Queensland total GVP is based on sampled GVP from all TRCs multiplied by the sampling fraction of 1.32

Table 6.12 shows the mean and total number of customers per year for the Karumba TRC. There were an estimated 2,800 customers that chartered trips over the previous 12 months, representing around 0.8% of the Queensland charter business.

Table 6.12 Number of Customers Per Business Per Year

	Mean per Business	Sample Total	Estimated Total
Karumba TRC	349	1,745	2,792
QLD	1,335	259,930	343,100
Percent of Queensland	0.8%		

Note: Sample count=5. The estimated value is based on an estimated 8 businesses (table 6.1)
The estimated QLD count is based on an estimated 257 businesses.

Table 6.13 shows the value of sales and the origin of customers visiting the Karumba TRC. Only 17.5% of charter income was local and only 3.7% of customers were overseas visitors. The majority of visitors that chartered trips from the Karumba TRC were Australians outside of Queensland (47.3%) and 31.5% were from within Queensland.

Table 6.13 Origin and Value of Customers

Origin	Sample Value of Sales	Mean Percent of Sample	Est. Value of all Sales
Local area	52,500	17.5	69,300
Queensland area	94,500	31.5	124,740
Outside Queensland	141,900	47.3	187,308
Overseas	11,100	3.7	14,652
Total Sales	$300,000	100.0	$396,000

Note: The sample value of sales is based on GVP as reported by businesses in the survey. The estimated value is the sample value multiplied by 1.32

Business Expenditure

Table 6.14 shows that approximately $206,000 was spent by businesses in the Karumba TRC on business goods and services (excluding salaries and wages) over the previous year. The majority of this expenditure occurred in Karumba (44.6% or $92,000), Normanton (12.8% or $26,000) and Cairns (13.4% or $28,000).

Table 6.14 Town Location of Business Expenditure
(All costs, excluding salaries and wages)

Location of Expenditure	Sample Value of Expenditure	Percent of Sample	Est. Value Expenditure
Karumba	69,710	44.6	92,010
Cairns	20,944	13.4	27,644
Normanton	20,006	12.8	26,406
Victoria	11,879	7.6	15,679
Burketown	10,003	6.4	13,203
Mt. Isa	8,597	5.5	11,347
Brisbane	5,314	3.4	7,014
NSW	4,220	2.7	5,570
Townsville	2,501	1.6	3,301
Ingham	2,032	1.3	2,682
Mission Beach	1,250	0.8	1,650
Total Expenditure	$156,300	100.0	$206,300

Note: Business expenditure includes all non-labour expenditure (ie. 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 6.15 shows the primary towns that charter operators resided within. Most charter operators lived within the town of Karumba (66.7%).

Table 6.15 Town of Residence

Town of Residence	Sample Count	Percent of Sample
Karumba	4	66.7
Normanton	1	16.7
Burketown	1	16.7
Total	6	100.0

Months Employed in the Charter Industry

Table 6.16 indicates that the majority of charter operators within the Karumba TRC were employed in the industry between April and November during the 12 months prior to the survey. All operators were employed during May and June. At least 81% of charter operators in Queensland were employed during any month of the year, whereas within the Karumba TRC, only 50% of operators were employed during January and February.

Table 6.16 Months Employed in the Charter Industry (During Past 12 Months)

Months	Owner Operators (%)	All QLD Operators
January	50.0	81.0
February	50.0	81.5
March	66.7	85.7
April	66.7	89.4
May	100.0	92.6
June	100.0	92.6
July	83.3	92.6
August	83.3	93.7
September	66.7	95.2
October	83.3	93.7
November	83.3	91.5
December	66.7	86.8

Location of Household Expenditure

Table 6.17 shows the location of household expenditure derived from employment in the charter industry. Karumba received the majority of expenditure (40.5%), with the remaining expenditure being directed to 10 other Australian locations.

Table 6.17 Town Location of Household Expenditure (all commodities and services)

Location of Household Expenditure	Sample Value of Expenditure	Percent of Sample	Est. Value Expenditure
Karumba	52,488	40.5	69,255
Mt. Isa	18,792	14.5	24,795
Cairns	15,811	12.2	20,862
Normanton	10,757	8.3	14,193
VIC	10,498	8.1	13,851
Burketown	10,757	8.3	14,193
Brisbane	5,443	4.2	7,182
NSW	1,814	1.4	2,394
Ingham	1,166	0.9	1,539
Mareeba	907	0.7	1,197
Townsville	907	0.7	1,197
Total Expenditure	$129,600	100.0	$171,000

Note: The sample total personal income for the Karumba TRC was $213,000. 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 $129,600. 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 6.18. Karumba (50%) and Normanton (42.9%) were the main towns for schooling and employment of family members.

Table 6.18 School and Employment Locations of Family Members

Location of Employment or School	Sample Count	Percent of Sample
Karumba	7	50.0
Normanton	6	42.9
Burketown	1	7.1
Total Family Members	41	100.0

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

Social and Demographic Profiles

Table 6.19 provides owner-operator profile information for the Karumba TRC. For comparative purposes, information is also provided for all charter operators throughout Queensland. Charter operators within the Karumba TRC were all male, tended to be relatively newer to the region and industry and more likely to be employed in another industry, although less likely to have worked in another industry. They were educated only as far as year 10, and more likely to have completed other courses and have a business plan. Less were likely to be married, yet if so, then their spouses were more likely to have full-time employment, and be employed in the charter industry.

Table 6.19 Owner-Operator Profiles for the Karumba TRC

Profile	Owner-Operators	All QLD Operators
Estimated Number of Charter-owners	8	199
Mean age of operator	44	45.4
Age range	21-53	20-76
Percent males	100.0	93.8
Mean years resident in town	4.4	19.1
Mean number of years in charter industry	5.1	11.0
Mean hours per week in charter industry	46.5	50.7
Percent moved town to retain employment	16.7	14.0
Percent currently employed in other industry	83.3	46.1
Percent previously employed in other industry	66.7	93.7
Housing tenure (%)		
Rent	16.7	14.1
Mortgage	33.3	33.0
Own home	50.0	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	20.0	3.2
Year 9	20.0	4.7
Year 10	60.0	32.6
Year 11	0.0	10.5
Year 12	0.0	45.8
Percent completed trade or TAFE certificate	16.7	52.2
Percent completed industry or business course	66.7	55.6
Percent with business plan	83.3	53.4
Marital Status		
Percent married or relationship	66.7	88.1
Partner's Income*		
Full-time employment	75.0	52.2
Part-time employment	0.0	23.3
Casual employment	25.0	8.8
Not employed	0.0	15.7
Family Composition		
Mean family size	2.5	3.2
Estimated number of total family members	15	596
Dependency Ratios		
Age Dependency Ratio**	21	21.7
Elderly Dependency Ratio	0	1.2
Child Dependency Ratio	21	20.6
Family Member Industry Dependency Ratio***	37.5	20.4
Gross Individual Income (%)		
Less than $16,000	20.0	39.2
$16,000 - $26,000	40.0	22.2
$26,000 - $36,000	0.0	9.5
$36,000 - $52,000	0.0	13.3
$52,000 - $78,000	20.0	9.5
Over $78,000	0.0	6.3
Average Income ($)	36,000	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.*

7 WEIPA TRC

The Weipa TRC consists of the town of Weipa located on the eastern coast of the Gulf of Carpentaria.

BUSINESS PROFILES

Location and Use of Ports

Table 7.1 shows the number of license holders within the Weipa TRC and the number of survey respondents who reported having homeports within the TRC. All respondents used Weipa as their homeport. On the basis of the sample count it is estimated that there are 8 commercial charter operators within this TRC and we can be 95% confident that the correct population count of commercial charter operators within the TRC is between 3 and 13. Figure 1 shows the geographic location of the Weipa TRC.

Table 7.1 Location of Homeports

Town	Adj. Database Count	Sample Count	Estimated Count	Percent within TRC
Weipa	6	6	8	100
Total TRC	6	6	8	100
95% Confidence Interval for Estimated TRC Count				3-13
Percent of Total Active License Holders in QLD				3.0%

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 7.2 shows the types of fishing activity on fishing-charter operations from the Weipa TRC over the previous year. On day trips, the main fishing activities were reef fishing (45.0%) and estuary fishing (45.0%). There were no overnight trips that were predominately fishing trips. On all extended trips, estuary fishing was the only fishing employed.

Table 7.3 shows the number of charters and the number of fishing-only charters from for the Weipa TRC. Most charters were day trips (433 days) and 72.3% of day trips were mainly fishing charters. There were no overnight trips from the Weipa TRC, and 6 days only spent on extended trips. No extended trips were chartered especially for fishing purposes.

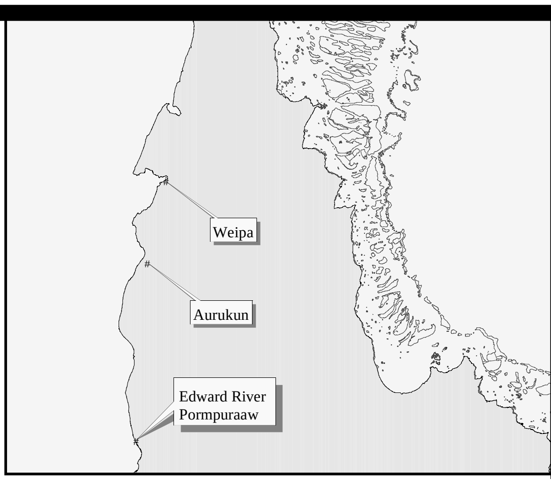

Figure 7.1 Location of the Weipa TRC

Table 7.4 shows the percentage of time spent fishing and doing other activities such as diving and cruising, for charters where fishing was not the only activity. On day trips fishing was the main activity (90%), and cruising and sightseeing made up 10% of the charter. No fishing was undertaken on overnight or extended trips.

Table 7.4 Activities on Charters (during the last 12 months)

Type	Within TRC	QLD
Day Trips		
% time spent fishing	90.0	52.9
% time spent diving/snorkeling	0.0	13.1
% time spent cruising/sightseeing	10.0	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	0.0	51.2
% time spent diving/snorkeling	0.0	22.9
% time spent cruising/sightseeing	0.0	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	0.0	51.2
% time spent diving/snorkeling	0.0	31.1
% time spent cruising/sightseeing	0.0	12.5
% time spent sailing	0.0	0.6
% time spent whale & dolphin watching	0.0	0.0
% time spent doing other activities	0.0	4.6

Table 7.5 shows that the peak months for charter activity within the Weipa TRC were April, October and November.

Table 7.2 Type of Fishing Activity during the last 12 months

	Day trips		Overnight trips		Extended trips	
Fishing Type	Mean % Time within TRC	Mean % Time QLD	Mean % Time within TRC	Mean % Time QLD	Mean % Time within TRC	Mean % Time QLD
Reef (bottom fishing)	45.0	47.5	0.0	66.0	0.0	51.2
Game (pelagic)	1.7	18.8	0.0	20.3	0.0	31.1
Estuary	45.0	26.8	0.0	11.6	100.0	12.5
Crabbing	5.0	0.5	0.0	0.2	0.0	0.5
Other	3.3	6.4	0.0	2.0	0.0	4.6
Total Sample	100.0	100.0	100.0	100.0	100.0	100.0

Note: Sample size n=6.

Table 7.3 Number of Charter Trips (during the last 12 months)

Type	Mean within TRC	QLD
Day Trips		
Mean number of day-trips (per business)	72.2	85.3
Mean number of fishing-only day-trips	52.2	59.9
Total number of day-trips	433	16,976
Total number of fishing-only day-trips	313	11,919
Percentage fishing-only trips	72.3%	70.2%
Overnight Trips		
Mean number of overnight trips (per business)	0.0	5.4
Mean number of fishing-only overnight-trips	0.0	3.3
Total number of overnight trips (x2 days per trip)	0.0	1,072
Total number of fishing-only days on overnight trips	0.0	665
Percentage fishing-only trips	0%	62.0%
Extended Trips		
Mean number of extended-trips	0.3	6.8
Mean number of fishing-only extended-trips	0.0	4.5
Total number of days on extended-trips	6.0	6,881
Total number of days on fishing-only extended trips	0.0	4,385
Percentage fishing-only trips	0.0%	66.1%
Mean number of days away (per business)	73.8	121.3
TOTAL days charter	439	24,929
Percentage of charters that were fishing only	98.8%	68.1%

Table 7.5 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	1	16.7	8.8
April	3	50.0	16.6
May	1	16.7	17.6
June	1	16.7	26.9
July	1	16.7	37.3
August	1	16.7	37.3
September	2	33.3	44.0
October	3	50.0	48.7
November	3	50.0	35.2
December	2	33.3	25.9

Location of Resource Use

Figure 7.2 shows the location of resource use by commercial charter operators in the Karumba TRC. The primary resource catchment is located directly in Albatross Bay, adjacent to Weipa.

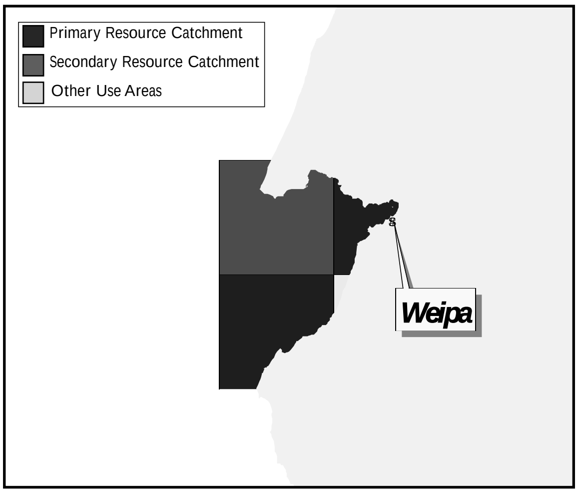

Figure 7.2 Weipa TRC: Location of Resource Use

Charter Industry Businesses

Table 7.6 identifies the number of charter employees within the Weipa TRC. The majority of businesses had between 1 and 3 fulltime (83.3%) and part-time (66.7%) employees, and 33.3% of businesses had between 1 and 3 casual employees. On average, there were 1.2 fulltime equivalent employees per business. In summary it is estimated that there were 15 people employed in the charter industry within the Weipa TRC over the previous year.

Business Ownership and Size

Table 7.7 shows the number of years the current owner or operator had owned the charter business. On average, businesses within the Weipa TRC had been owned for 1.6 years, and all businesses had been owned for less than 5 years. Businesses in the Weipa TRC are significantly younger than the average Queensland charter businesses (mean 7.0 years).

Table 7.7 Number of Years of Current Ownership of the Charter Business

Number of Years	Sample Count	Percent within TRC	Cumulative Percent
1-5	6	100.0	100.0
6-10	0	0.0	0.0
11-15	0	0.0	0.0
15+	0	0.0	0.0
Total	6	100.0	100.0
Mean Number of Years owned or operated			1.6
Difference of TRC Mean to QLD Population Mean (7.0)			-5.4

Note: Standard errors for number of years ownership (sample = 0.2; QLD population = 0.5).

Table 7.8 shows that the average number of years the charter business had been operating was 1.6 years, which is the same as the number of years of current ownership of the business. Businesses in this TRC are much younger than those in other parts of Queensland (mean 8.3 years).

Table 7.6 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	16.7	2	33.3	4	66.7
1	3	50.0	3	50.0	1	16.7
2-3	2	33.3	1	16.7	1	16.7
4-5	0	0.0	0	0.0	0	0.0
Total Businesses	6	100.0	6	0.0	6	100.0
Total Charter operators	7		5		3	
Mean Number of Employees per Business				1.8		
Mean Number of Full-time Employees per Business				1.2		
Mean Number of Part-time & Casual Employees per Business				1.3		
Estimated Number Employed within the TRC				15		

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

Table 7.8 Number of Years Business has been Operating

Number of Years	Sample Count	Percent within TRC	Cumulative Percent
1-5	6	100.0	100.0
6-10	0	0.0	0.0
11-15	0	0.0	0.0
15+0	0	0.0	0.0
Total	6	100.0	100.0
Mean Number of Years owned or operated			1.6
Difference of Mean to Population Mean (8.3)			-6.7

Note: Standard errors for number of years operated (sample = 0.2; QLD population = 0.6)

Table 7.9 shows that all charter businesses within the Weipa TRC operated with one boat only. This was less than the Queensland average (1.3 boats).

Table 7.9 Number of Boats Operated by Charter Businesses

Number of Boats	Sample Count	Percent TRC
1	6	100.0
2	0	0.0
3	0	0.0
4+	0	0.0
Total Number of Businesses	6	100.0
Mean Number of Boats Operated		1.0
Difference of Mean to QLD Population Mean (1.3)		-0.3

Note: Standard errors for number of boats operated (sample = 0.0; QLD population = 0.06)

Table 7.10 shows the frequency distribution of the length of boats within the Weipa TRC. Most boats (57.1%) were less than 6m in length. Nearly 29% of boats were between 7-10m and 14.3% were between 15-18m. The average boat in the Weipa TRC was around 5m shorter than the average Queensland charter vessel, and the length of the largest boats in Weipa (average 7.7m) were around 4m shorter than the average largest Queensland owned vessels (11.7m).

Table 7.10 Length of Vessels Operated

Length of Boat (metres)	Sample Count	Percent TRC
2-6	4	57.1
7-10	2	28.6
11-14	0	0.0
15-18	1	14.3
18-24	0	0.0
24+	0	0.0
Total Number of Boats	7	100.0
Mean Length of Boats Operated (metres)		7.4
Difference of Mean to QLD Population Mean (11.4)		-5.0
Mean Length of Largest Boat Operated (metres)		7.7
Difference of Mean to QLD Population Mean (11.7)		-4.0

Note: Standard errors for mean length of boats (sample = 1.4; QLD population=0.4) and mean length of largest boats (sample = 1.7; QLD population=0.5).

Value of Production and Location of Sales

Table 7.11 shows the income of charter operations within the Weipa TRC for the twelve months prior to the survey. The profile was markedly different to the overall profile for Queensland. In the Weipa TRC all businesses earned less than $100,000, whereas only 65.8% of Queensland businesses earned less than $100,000. The estimated total income from charter operations for the Weipa TRC was $396,000, which represents 1.2% of the Queensland income.

Table 7.11 Business Income (Annual value)

Value ($,000)	Sample Count	Sample Percent	Queensland Percent
Less than $100	6	100.0	65.8
$101 - $200	0	0.0	11.5
$201 - $300	0	0.0	7.5
$301 - $400	0	0.0	4.0
$401 - $500	0	0.0	6.0
$501 - $600	0	0.0	2.0
$601 - $700	0	0.0	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	6	100.0	100.0
Mean GVP for TRC			$50,000
Estimated Total GVP for TRC			$396,000
Estimated Total GVP for QLD Population			$ 34,419,000
Percent of Total Queensland Production			1.2%

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

Table 7.12 shows the number of customers over the previous year for the Weipa TRC. There was an estimated 1,600 customers, representing approximately 0.5% of the Queensland industry

Table 7.12 Number of Customers per Business per Year

	Mean per Business	Sample Total	Estimated Total
Weipa TRC	203.8	1,223	1,631
QLD	1,335	259,930	343,108
Percent of Queensland	0.5%		

Note: The estimated QLD count is based on an estimated 257 businesses.

Table 7.13 shows the value and the origin of customers visiting the Weipa TRC. Most customers came from Queensland (29.2% or $116,000), and other parts of Australia (40.7% or $161,000). Only a small percentage of customers were from the local area (16.7%) or overseas (13.5%).

Table 7.13 Origin and Value of Customers

Origin	Sample Value of Sales	Mean Percent of Sample	Est. Value of all Sales
Local area	50,100	16.7	66,132
Queensland area	87,600	29.2	115,632
Outside Queensland	122,100	40.7	161,172
Overseas	40,500	13.5	53,460
Total Sales	$300,000	100.0	$396,000

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

Business Expenditure

Table 7.14 shows that approximately $0.2 million was spent by businesses in the Weipa TRC on business goods and services (excluding salaries and wages) over the previous year. The majority of this expenditure occurred in Weipa (62% or $0.13 million) and Cairns (27.8% or $57,000).

Table 7.14 Town Location of Business Expenditure (All costs, excluding salaries and wages)

Location of Expenditure	Sample Value of Expenditure	Percent of Sample	Estimated Expenditure
Weipa	96,906	62.0	127,906
Cairns	43,451	27.8	57,351
Brisbane	4,220	2.7	5,570
Nwe South Wales	3,908	2.5	5,158
Victoria	2,970	1.9	3,920
Princess Charlotte Bay	2,032	1.3	2,682
Townsville	1,719	1.1	2,269
Yeppoon	938	0.6	1,238
Total Expenditure	$156,300	100.0	$206,300

Note: Business expenditure includes all non-labour expenditure (ie. 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 7.15 shows the primary town of residence for charter-owners within the Weipa TRC. The majority of owners resided in Weipa (83.3%) and 16.7% lived in Cairns.

Table 7.15 Town of Residence

Town of Residence	Sample Count	Percent of Sample
Weipa	5	83.3
Cairns	1	16.7
Total	6	100.0

Months Employed in the Charter Industry

Table 7.16 indicates that all owner-operators within the Cairns TRC were employed in the charter industry between September and November, and that only 50% of owners were employed during January and February.

Table 7.16 Months Employed in the Charter Industry During Past 12 Months

Months	Owner Operators (%)	All QLD Operators
January	50.0	81.0
February	50.0	81.5
March	66.7	85.7
April	66.7	89.4
May	66.7	92.6
June	66.7	92.6
July	66.7	92.6
August	66.7	93.7
September	100.0	95.2
October	100.0	93.7
November	100.0	91.5
December	83.3	86.8

Table 7.17 shows the location of household expenditure derived from employment in the charter industry. Weipa (72.3%) received the majority of household expenditure, and Cairns received 25.6%. The value of household expenditure was estimated at $103,600.

Table 7.17 Town Location of Household Expenditure (all commodities and services)

Location of Household Expenditure	Sample Value of Expenditure	Percent of Sample	Est. Value Expenditure
Weipa	56,756	72.3	74,903
Cairns	20,096	25.6	26,522
Brisbane	1,099	1.4	1,450
VIC	550	0.7	725
Total Expenditure	$78,500	100.0	$103,600

Note: The sample total personal income for the Weipa TRC was $129,000. 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 $78,500. 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 7.18. Weipa (75.0%) was the main town for schooling and employment of family members, and 25% of family members were employed or attended school in Cairns.

Table 7.18 School and Employment Locations of Family Members

Location of Employment or School	Sample Count	Percent of Sample
Cairns	4	25.0
Weipa	12	75.0
Total Family Members	41	100.0

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

Social and Demographic Profiles

Table 7.19 provides owner-operator profile information for the Weipa TRC. For comparative purposes, information is also provided for all charter operators throughout Queensland. Charter owner-operators in the Weipa TRC were all male, newer residents to their town, worked less hours per week and were more likely to have moved to gain employment in the industry. They were also more likely to rent, were more likely to have completed a business course and have a business plan, and had a higher ratio of children and eldery dependency than the average Queensland charter operator. These operators also had a reduced income compared to the Queensland average.

Table 7.19 Owner-Operator Profiles for the Weipa TRC

Profile	Owner-Operators	All QLD Operators
Estimated Number of Charter-owners	6	199
Mean age of fisher	44.3	45.4
Age range	31-62	20-76
Percent males	100.0	93.8
Mean years resident in town	9.9	19.1
Mean number of years in charter industry	10.3	11.0
Mean hours per week in charter industry	36.2	50.7
Percent moved town to retain employment	33.3	14.0
Percent currently employed in other industry	100.0	46.1
Percent previously employed in other industry	83.3	93.7
Housing tenure (%)		
Rent	83.3	14.1
Mortgage	16.7	33.0
Own home	0.0	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	0.0	3.2
Year 9	0.0	4.7
Year 10	66.7	32.6
Year 11	0.0	10.5
Year 12	33.3	45.8
Percent completed trade or TAFE certificate	60.0	52.2
Percent completed industry or business course	83.3	55.6
Percent with business plan	83.3	53.4
Marital Status		
Percent married or relationship	83.3	88.1
Partner's Income*		
Full-time employment	60.0	52.2
Part-time employment	40.0	23.3
Casual employment	0.0	8.8
Not employed	0.0	15.7
Family Composition		
Mean family size	2.5	3.2
Estimated number of total family members	15	596
Dependency Ratios		
Age Dependency Ratio**	33.3	21.7
Elderly Dependency Ratio	0.0	1.2
Child Dependency Ratio	33.3	20.6
Family Member Industry Dependency Ratio***	12.5	20.4
Gross Individual Income (%)		
Less than $16,000	66.7	39.2
$16,000 - $26,000	16.7	22.2
$26,000 - $36,000	0.0	9.5
$36,000 - $52,000	16.7	13.3
$52,000 - $78,000	0.0	9.5
Over $78,000	0.0	6.3
Average Income ($)	16,000	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.*

8 THURSDAY ISLAND TRC

The Thursday Island TRC consists of the town of Thursday Island in the Torres Strait, and the town of Bamaga on the mainland.

BUSINESS PROFILES

Location and Use of Ports

Table 8.1 shows the number of license holders within the Thursday Island 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 6 commercial charter operators within this TRC and a 95% certainty that the correct population count of commercial charter operators within the TRC is between 1 and 11. Most respondents reported Seisia as their homeport (66.6%), and Bamaga (16.7%) and Thursday Island (16.7%) were also reported. Figure 8.1 shows the geographic location of the Thursday Island TRC.

Table 8.1 Location of Homeports

Town	Adj. Database Count	Sample Count	Estimated Count	Percent within TRC
Seisia	0	3	4	66.6
Bamaga	5	1	1	16.7
Thursday Island	1	1	1	16.7
Total TRC	6	5	6	100.0
95% Confidence Interval for Estimated TRC Count				1-11
Percent of Total Active License Holders in QLD				2.5%

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 8.2 shows the types of fishing activity on charter operations from the Thursday Island TRC for those charters that were predominately fishing-charters. On day trips, the main fishing activities were game fishing (51.7%) and estuary fishing (42.7%). Only little reef fishing (4.0%) and crabbing (1.7%) occurred on day trips. There were no overnight trips that were predominately fishing trips. On extended trips, the main fishing activities were also estuary fishing (72.5%) and game fishing (17.5%).

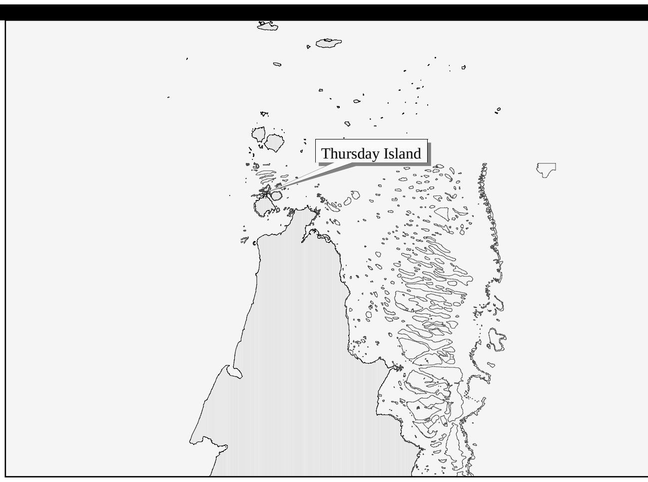

Figure 8.1 Location of the Thursday Island TRC

Table 8.3 shows the number of trips, and percentage of trips that were chartered primarily for fishing from the Thursday Island TRC. Most charters were extended trips (391 days) and day trips (330 days), and 96.4% of extended trips were fishing charters. Only 26.7% of day trips were chartered for fishing. There were no overnight trips from the Weipa TRC.

Table 8.4 shows the percentage of time spent fishing and doing other activities such as diving and cruising, for charters where fishing was not the only activity. On day trips diving/snorkeling (44.3%) and cruising/sightseeing (35.7%) were the main activities, and fishing represented 20% of the activities.

Table 8.4 Charter Activities during last 12 Months

Type	Within TRC	QLD mean
Day Trips		
% time spent fishing	20.0	52.9
% time spent diving/snorkeling	44.3	13.1
% time spent cruising/sightseeing	35.7	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	0.0	51.2
% time spent diving/snorkeling	0.0	22.9
% time spent cruising/sightseeing	0.0	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	0.0	51.2
% time spent diving/snorkeling	0.0	31.1
% time spent cruising/sightseeing	0.0	12.5
% time spent sailing	0.0	0.6
% time spent whale & dolphin watching	0.0	0.0
% time spent doing other activities	0.0	4.6

Table 8.2 Type of Fishing Activity (during the last 12 months)

	Day trips		Overnight trips		Extended trips	
Fishing Type	Mean % Time within TRC	Mean % Time QLD	Mean % Time within TRC	Mean % Time QLD	Mean % Time within TRC	Mean % Time QLD
Reef (bottom fishing)	4.0	47.5	0.0	66.0	5.0	51.2
Game (pelagic)	51.7	18.8	0.0	20.3	17.5	31.1
Estuary	42.7	26.8	0.0	11.6	72.5	12.5
Crabbing	1.7	0.5	0.0	0.2	2.5	0.5
Other	0.0	6.4	0.0	2.0	2.5	4.6
Total Sample	100.0	100.0	100.0	100.0	100.0	100.0

Table 8.3 Number of Charter Trips (during the last 12 months)

Type	Mean within TRC	QLD
Day Trips		
Mean number of day-trips (per business)	66.0	85.3
Mean number of fishing-only day-trips	17.6	59.9
Total number of day-trips	330	16,976
Total number of fishing-only day-trips	88	11,919
Percentage fishing-only trips	26.7%	70.2%
Overnight Trips		
Mean number of overnight-trips (per business)	0.0	5.39
Mean number of fishing-only overnight-trips	0.0	3.34
Total number of overnight trips (x2 days per trip)	0.0	1,072
Total number of fishing-only days on overnight trips	0.0	665
Percentage fishing-only trips	0.0%	62.0%
Extended Trips		
Mean number of extended-trips	11.4	6.9
Mean number of fishing-only extended-trips	11.0	4.49
Total number of days on extended trips	391	6,881
Total number of fishing-only days on extended trips	377	4,385
Percentage fishing-only trips	96.4%	66.1%
Mean number of days away (per business)	144.2	121.3
TOTAL days charter	720	16,969
Percentage of charters that were fishing only	*64.5*	*68.1%*

Table 8.5 shows that the peak months for charter activity within the Thursday Island TRC were April to November, especially in July and October.

Table 8.5 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	1	40.0	8.8
April	2	60.0	16.6
May	3	60.0	17.6
June	3	60.0	26.9
July	4	80.0	37.3
August	3	60.0	37.3
September	3	60.0	44.0
October	4	80.0	48.7
November	3	60.0	35.2
December	1	20.0	25.9

Location of Resource Use

Figure 8.2 shows the location of resource use by charter operators in the Thursday Island TRC. The primary resource catchment is the Torres Strait, although some charters extend some distance along the mainland coastline.

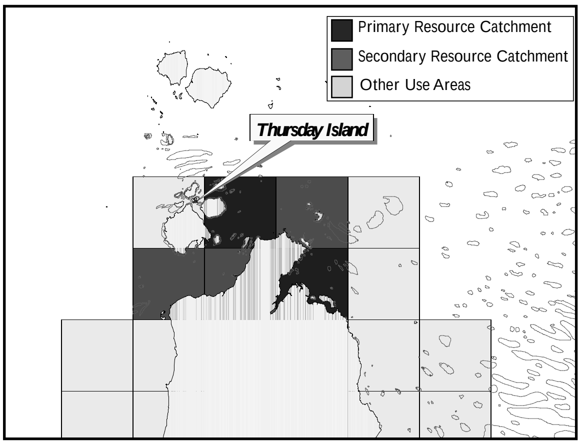

Figure 8.2 Thursday Is. TRC: Location of Resource Use

Charter Industry Businesses

Table 8.6 identifies the number of employees within the Thursday Island TRC. The majority of businesses had 1 fulltime staff (owner-operator) (80%), and 1-3 casual employees (60%). There was a mean of 1.6 fulltime equivalent staff per business, and it is estimated that there were 27 people employed in the industry over the previous 12 months.

Business Ownership and Size

Table 8.7 shows the number of years the current owner-operator had owned the charter business. Most businesses had been owned for less than 5 years (80.0%) and on average, businesses had been owned for 4.6 years. This is around 2.4 years less than the average Queensland charter business (7 years).

Table 8.7 Number of Years of Current Ownership of the Charter Business

Number of Years	Sample Count	Percent within TRC	Cumulative Percent
1-5	4	80.0	80.0
6-10	1	20.0	100.0
11-15	0	0.0	0.0
15+	0	0.0	0.0
Total	6	100.0	100.0
Mean Number of Years owned or operated			4.6
Difference of TRC Mean to QLD Population Mean (7.0)			-2.4

Note: Standard errors for number of years ownership (sample = 1.5; QLD population = 0.5).

Table 8.8 shows that the average number of years the charter business had been operating (regardless of the owner) was 5.0 years, which is 3.3 years less than the average Queensland charter business (8.3 years).

Table 8.6 Number of Employees

Number of Charter operators	Full-Time Count	Full-Time Percent	Part-Time Count	Part-Time Percent	Casual Count	Casual Percent
Nil	0	0.0	4	80.0	2	40.0
1	4	80.0	0	0.0	1	20.0
2-3	1	20.0	0	0.0	2	40.0
4-5	0	0.0	0	0.0	0	0.0
5+	0	0.0	1	20.0	0	0.0
Total Businesses	5	100.0	5	100.0	5	100.0
Total Employees	8		14		5	
Mean Number of Employees per Business				3.5		
Mean Number of Full-time Employees per Business				1.6		
Mean Number of Part-time & Casual Employees per Business				3.8		
Estimated Number Employed within the TRC				27		

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

Table 8.8 Number of Years Business has been Operating

Number of Years	Sample Count	Percent within TRC	Cumulative Percent
1-5	4	80.0	80.0
6-10	1	20.0	100.0
11-15	0	0.0	0.0
15+	0	0.0	0.0
Total	5	100.0	100.0
Mean Number of Years owned or operated			5.0
Difference of Mean to Population Mean (8.3)			-3.3

Note: Standard errors for number of years operated (sample = 1.5; QLD population = 0.6)

Table 8.9 shows the number of boats operated by each business in the Thursday Island TRC. The majority of charter businesses operated two (40.0%) or three (40%) boats. The average number of boats (2.2 boats) was greater than the Queensland average (1.3 boats).

Table 8.9 Number of Boats Operated by Charter Businesses

Number of Boats	Sample Count	Percent TRC
1	1	20.0
2	2	40.0
3	2	40.0
4+	0	0.0
Total Number of Businesses	5	100.0
Mean Number of Boats Operated		2.2
Difference of Mean to QLD Population Mean (1.3)		+0.9

Note: Standard errors for number of boats operated (sample = 0.4; QLD population = 0.06)

Table 8.10 shows the frequency distribution of the length of boats within the Thursday Island TRC. Most boats were less than six metres (60%). The mean length of boats (8.4m) was three metres less than the average Queensland vessel (11.4m).

Table 8.10 Length of Vessels Operated

Length of Boat (metres)	Sample Count	Percent TRC
2-6	6	60.0
7-10	1	10.0
11-14	2	20.0
15-18	1	10.0
19-24	0	0.0
24+	0	0.0
Total Number of Boats	10	100.0
Mean Length of Boats Operated (metres)		8.4
Difference of Mean to QLD Population Mean (11.4)		-3.0
Mean Length of Largest Boat Operated (metres)		10.8
Difference of Mean to QLD Population Mean (11.7)		-0.9

Note: Standard errors for mean length of boats (sample = 1.4; QLD population=0.4) and mean length of largest boats (sample =2.3 ; QLD population=0.5).

Value of Production and Location of Sales

Table 8.11 shows the value of charter operations within the Thursday Island TRC for the twelve months prior to the survey. Eighty percent of businesses earned less than $100,000, and 20% earned between $100-200,000. This profile shows that businesses in the Thursday Island TRC were smaller compared to the rest of Queensland, in which 22.7% of businesses earned more than $200,000. The estimated GVP for the Thursday Island TRC was $429,000, representing 1.2% of the Queensland charter industry.

Table 8.11 Business Income (Annual value)

Value ($,000)	Sample Count	Sample Percent	Queensland Percent
Less than $100	4	80.0	65.8
$101 - $200	1	20.0	11.5
$201 - $300	0	0.0	7.5
$301 - $400	0	0.0	4.0
$401 - $500	0	0.0	6.0
$501 - $600	0	0.0	2.0
$601 - $700	0	0.0	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	5	100.0	100.0
Mean GVP for TRC			$65,000
Estimated Total GVP for TRC			$429,000
Estimated Total GVP for QLD			$34,419,000
Percent of Total Queensland Production			1.2%

Table 8.12 shows the mean and total number of customers for the Thursday Island TRC over the previous year. It is estimated that approximately 5,000 customers chartered trips from the Thursday Island TRC, representing 1.5% of the Queensland business.

Table 8.12 Number of Customers for the Previous Year

	Mean Customers per Business	Sample Count	Estimated Total
Thursday Island TRC	839	3,356	5,034
QLD	1,335	259,930	343,100
Percent of Queensland	1.5%		

Table 8.13 shows the value of sales and the origin of customers visiting the Thursday Island TRC over the previous year. Most customers were from the Queensland area (44%) and other parts of Australia (25%), although a considerable number were from the local area (23%). Only 8% of customers were visitors from overseas. The estimated value of trips that were chartered over the previous 12 months is $429,000.

Table 8.13 Origin and Value of Customers

Origin	Sample Value of Sales	Mean Percent of Sample	Est.Value of all Sales
Local area	74,750	23.0	98,670
Queensland area	143,000	44.0	188,760
Outside Queensland	81,250	25.0	107,250
Overseas	26,000	8.0	34,320
Total Sales	$325,000	100.0	$429,000

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

Business Expenditure

Table 8.14 displays the towns in which charter-owners purchased goods and services (excluding salaries and wages) for their business. It is estimated that $0.2m was spent by businesses from the Thursday Island TRC over the previous 12 months. The majority of this expenditure occurred in Cairns (36.9% or $82,000), Seisia (32.6% or $73,000), and Thursday Island (22.1% or $9,000).

Table 8.14 Town Location of Business Expenditure (All costs, excluding salaries and wages)

Location of Expenditure	Sample Value of Expenditure	Percent of Sample	Est.Value Expenditure
Cairns	62,472	36.9	82,472
Seisia	55,192	32.6	72,861
Thursday Island	37,415	22.1	49,394
Bamaga	6,772	4.0	8,940
NSW	3,420	2.0	4,515
Townsville	2,540	1.5	3,353
WA	1,016	0.6	1,341
Total Expenditure	$169,300	100.0	$223,500

Note: Business expenditure includes all non-labour expenditure (ie. 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 8.15 shows the primary town of residence for charter-owners from the Thursday Island TRC. Most owners resided in Seisia (60%) and others lived in Bamaga (20%) and Cairns (20%).

Table 8.15 Town of Residence

Town of Residence	Sample Count	Percent of Sample
Seisia	3	60.0
Bamaga	1	20.0
Cairns	1	20.0
Total	5	100.0

Months Employed in the Charter Industry

Table 8.16 indicates that all owner-operators within the Thursday Island TRC were employed in the industry in March, and from June to October. Only 20% of owners were employed during January to March, however.

Table 8.16 Months Employed in the Charter Industry During Past 12 Months

Months	Owner Operators (%)	All QLD operators
January	20.0	81.0
February	20.0	81.5
March	20.0	85.7
April	100.0	89.4
May	80.0	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	60.0	91.5
December	80.0	86.8

Table 8.17 shows the location of household expenditure derived from employment in the Charter Industry. It is estimated that $120,000 was spent on household items and the majority of this was spent in Seisia (48.4%), Cairns (25.2%) and Thursday Island (12.7%).

Table 8.17 Town Location of Household Expenditure (all commodities and services)

Location of Household Expenditure	Sample Value of Expenditure	Percent of Sample	Est. Value Expenditure
Seisia	44,141	48.4	58,274
Cairns	22,982	25.2	30,341
Thursday Island	11,582	12.7	15,291
Bamaga	8,208	9.0	10,836
NSW	3,739	4.1	4,936
Brisbane	547	0.6	722
Total Expenditure	$91,200	100.0	$120,400

Note: The sample total personal income for the Thursday Island TRC was $150,000. 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 $91,245. 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 8.18. Seisia (41.7%) and Thursday Island (16.7%) were the main towns for school and employment of family members. Nearly 17% of family members attended school or were employed overseas, and others attended school or were employed in Cairns (8.3%) and Brisbane (8.3%).

Table 8.18 School and Employment Locations of Family Members

Location of Employment or School	Sample Count	Percent of Sample
Seisia	5	41.7
Thursday Island	2	16.7
Overseas	2	16.7
Bamaga	1	8.3
Brisbane	1	8.3
Cairns	1	8.3
Total Family Members	41	100.0

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

Social and Demographic Profiles

Table 8.19 provides charter-owner profile information for the Thursday Island TRC. Information is also provided for all Queensland charter-owners. Owners from the Thursday Island TRC were all male, newer residents to the area, worked longer hours per week, were more likely to have moved to retain their employment, less likely to have other employment, more likely to have completed a business course and have a business plan. Fewer were likely to be married, there were no dependents, and the individual income was also lower than the Queensland average.

Table 8.19 Owner-Operator Profiles for the Thursday Island TRC

Profile	Owner-Operators	All QLD Operators
Estimated Number of Charter-owners	5	199
Mean age of fisher	44.0	45.4
Age range	36-53	20-76
Percent males	100.0	93.8
Mean years resident in town	9.6	19.1
Mean number of years in charter industry	10.0	11.0
Mean hours per week in charter industry	64.4	50.7
Percent moved town to retain employment	40.0	14.0
Percent currently employed in other industry	20.0	46.1
Percent previously employed in other industry	100.0	93.7
Housing tenure (%)		
Rent	20.0	14.1
Mortgage	20.0	33.0
Own home	60.0	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	0.0	3.2
Year 9	0.0	4.7
Year 10	40.0	32.6
Year 11	20.0	10.5
Year 12	40.0	45.8
Percent completed trade or TAFE certificate	50.0	52.2
Percent completed industry or business course	80.0	55.6
Percent with business plan	80.0	53.4
Marital Status		
Percent married or relationship	60.0	88.1
Partner's Income*		
Full-time employment	66.7	52.2
Part-time employment	0.0	23.3
Casual employment	0.0	8.8
Not employed	33.3	15.7
Family Composition		
Mean family size	2.5	3.2
Estimated number of total family members	10	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***	0.0	20.4
Gross Individual Income (%)		
Less than $16,000	66.7	39.2
$16,000 - $26,000	16.7	22.2
$26,000 - $36,000	0.0	9.5
$36,000 - $52,000	16.7	13.3
$52,000 - $78,000	0.0	9.5
Over $78,000	0.0	6.3
Average Income ($)	16,000	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.*

9 COOKTOWN TRC

The Cooktown TRC consists of the main towns of Cooktown and Bloomfield located on the north Queensland Coast.

BUSINESS PROFILES

Location and Use of Ports

Table 9.1 shows the number of license holders within the Cooktown 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 6 commercial charter operators within this TRC and a 95% certainty that the correct population count of commercial charter operators within the TRC is between 1 and 11. Most respondents used Cooktown as their homeport (83.3%) and Bloomfield was also used (16.7%). Figure 1 shows the geographic location of the Cooktown TRC.

Table 9.1 Location of Homeports

Town	Adj. Database Count	Sample Count	Estimated Count	Percent within TRC
Cooktown	5	4	5	83.3
Bloomfield	0	1	1	16.7
Total TRC	5	5	6	100.0
95% Confidence Interval for Estimated TRC Count				1-11
Percent of Total Active License Holders in QLD				2.5%

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 9.2 shows the types of fishing activities that were chartered from the Cooktown TRC over the previous year. On day trips the main fishing that was chartered was reef fishing (52%) and estuary fishing (40%). There was also some game fishing (7%). On overnight trips, the only fishing activity was reef fishing, and on extended trips, fishing was divided between estuarine (50%), game (25%) and reef fishing (25%).

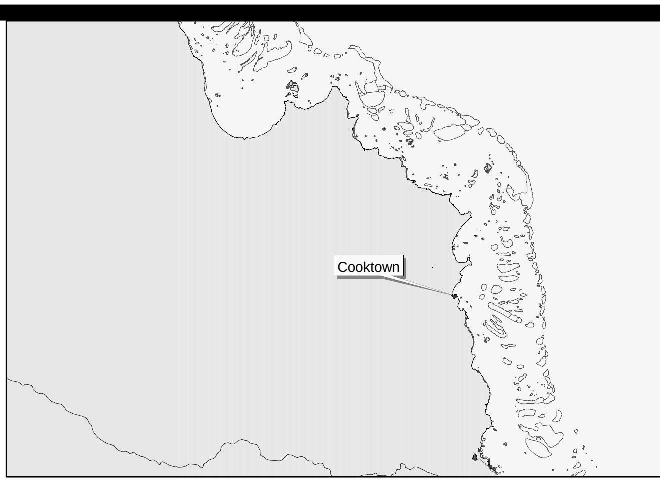

Figure 9.1 Location of the Cooktown TRC

Table 9.3 shows the number of trips from the Cooktown TRC and the percentage of trips that were predominately fishing charters. Most trips from the TRC were day trips (405 days) and 78% of day trips were fishing-only trips. Although there were 30 days chartered on overnight trips over the previous year, no overnight trips were chartered especially for fishing. Seventy-five percent of extended trips were chartered for fishing. On average, businesses in the Cooktown TRC were out on the water for fewer days (89) than the Queensland average (121), and nearly 73% of charters from the TRC were predominately for fishing purposes.

Table 9.4 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, fishing was the predominant activity (65%), and nearly 20% of the time available was spent cruising and sightseeing, and nearly 15% of time was spent diving and snorkeling. On overnight trips, fishing was also the main activity (85%), and diving and snorkeling was the other reported activity (15%). Similarly, on extended trips, fishing was the major activity (90%), and 10% of time was spent diving and snorkeling.

Table 9.5 shows that the peak months for charter activity within the Cooktown TRC were July to November, similar to the peak months for the average Queensland industry.

Table 9.2 Type of Fishing Activity (during the last 12 months)

	Day trips		Overnight trips		Extended trips	
Fishing Type	Mean % Time within TRC	Mean % Time QLD	Mean % Time within TRC	Mean % Time QLD	Mean % Time within TRC	Mean % Time QLD
Reef (bottom fishing)	52.0	47.5	100.0	66.0	25.0	51.2
Game (pelagic)	7.0	18.8	0.0	20.3	25.0	31.1
Estuary	40.0	26.8	0.0	11.6	50.0	12.5
Crabbing	0.0	0.5	0.0	0.2	0.0	0.5
Other	1.0	6.4	0.0	2.0	0.0	4.6
Total Sample	100.0	100.0	100.0	100.0	100.0	100.0

Table 9.3 Number of Charter Trips (during the last 12 months)

Type	Mean within TRC	QLD Mean
Day Trips		
Mean number of day-trips (per business)	81.0	85.3
Mean number of fishing-only day-trips	63.2	59.9
Total number of day-trips	405	16,976
Total number of fishing-only day-trips	316	11,919
Percentage fishing-only trips	78.0%	70.2%
Overnight Trips		
Mean number of overnight trips (per business)	3.0	5.39
Mean number of fishing-only overnight-trips	0.0	3.34
Total number of days on overnight trips	30.0	1,072
Total number of fishing-only days on overnight trips	0.0	665
Percentage fishing-only trips	0.0%	62.0%
Extended Trips		
Mean number of extended-trips	1.6	6.9
Mean number of fishing-only extended-trips	1.2	4.49
Total number of days on extended trips	8.0	6,881
Total number of fishing-only days on extended trips	6.0	4,385
Percentage fishing-only trips	75.0%	66.1%
Mean number of days away (per business)	89.2	121.3
TOTAL days charter	443	16,969
Percentage charter- fishing only	72.7%	68.1%

Table 9.4 Percent of Time Spent on Each Activity (during the last 12 months)

Type	Within TRC	QLD mean
Day Trips		
% time spent fishing	65.0	52.9
% time spent diving/snorkeling	14.5	13.1
% time spent cruising/sightseeing	19.3	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	85.0	51.2
% time spent diving/snorkeling	15.0	22.9
% time spent cruising/sightseeing	0.0	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	90.0	51.2
% time spent diving/snorkeling	10.0	31.1
% time spent cruising/sightseeing	0.0	12.5
% time spent sailing	0.0	0.6
% time spent whale & dolphin watching	0.0	0.0
% time spent doing other activities	0.0	4.6

Table 9.5 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	3	60.0	37.3
August	4	80.0	37.3
September	4	80.0	44.0
October	3	60.0	48.7
November	2	40.0	35.2
December	0	0.0	25.9

Location of Resource Use

Figure 2 shows the location of resource use by commercial charter operators in the Cooktown TRC. The location of resource use is predominately localised to the reefs closest to Cooktown. The primary resource catchment is concentrated to the marine area adjacent to Cooktown.

Charter Industry Businesses

Table 9.6 identifies the number of employees within the Cooktown TRC. The majority of businesses had 1-3 employees that were either fulltime (60%) or casual (80%). There was an average of 1 fulltime equivalent person per business. In summary it is estimated that there were 24 people employed in the charter industry within the Cooktown TRC over the previous year.

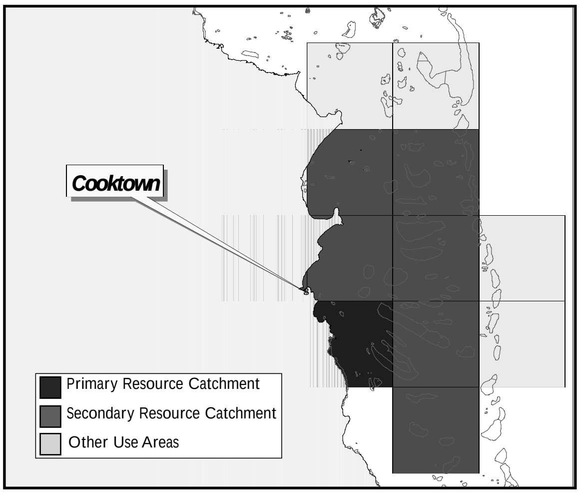

Figure 9.2 Cooktown TRC: Location of Resource Use

Table 9.6 Number of Employees

Number of Charter Employees	Full-Time Count	Full-Time Percent	Part-Time Count	Part-Time Percent	Casual Count	Casual Percent
Nil	2	40.0	4	80.0	1	20.0
1	1	20.0	1	20.0	3	60.0
2-3	2	40.0	0	0.0	1	20.0
4-5	0	0.0	0	0.0	0	0.0
Total Businesses	5	100.0	5	0.0	5	100.0
Total Employees	5		1		18	
Mean Number of Employees per Business				3.0		
Mean Number of Full-time Employees per Business				1.0		
Mean Number of Part-time & Casual Employees per Business				3.8		
Estimated Number Employed within the TRC				24		

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 9.7 shows the number of years of current ownership of the charter business. Eighty percent of businesses were owned for less than five years, and on average, businesses had been owned for 3.6 years, which is 3.4 years less than the average Queensland charter business (7 years).

Table 9.7 Number of Years of Current Ownership of the Charter Business

Number of Years	Sample Count	Percent within TRC	Cumulative Percent
1-5	4	80.0	80.0
6-10	1	20.0	100.0
11-15	0	0.0	0.0
15+	0	0.0	0.0
Total	5	100.0	100.0
Mean Number of Years owned or operated			3.6
Difference of TRC Mean to QLD Population Mean (7.0)			-3.4

Note: Standard errors for number of years ownership (sample = 1.2; QLD population = 0.5).

Table 9.8 shows the number of years of operation for charter businesses in the TRC. Most businesses had been operating for less than five years, and for an average 4.8 number of years, some 3.5 years less than the average Queensland charter business.

Table 9.8 Number of Years Business has been Operating

Number of Years	Sample Count	Percent within TRC	Cumulative Percent
1-5	3	60.0	60.0
6-10	1	20.0	80.0
11-15	1	20.0	100.0
15+	0	0.0	0.0
Total	5	100.0	100.0
Mean Number of Years owned or operated			4.8
Difference of Mean to Population Mean (8.3)			-3.5

Note: Standard errors for number of years operated (sample = 1.9; QLD population = 0.6)

Table 9.9 displays the number of boats operated by each charter business in the Cooktown TRC. The majority of businesses operated one boat (80.0%), and 20% operated two boats. The average number of boats owned (1.2 boats) was similar to the Queensland average (1.3 boats).

Table 9.9 Number of Boats Operated by Charter Businesses

Number of Boats	Sample Count	Percent TRC
1	4	80.0
2	1	20.0
3	0	0.0
4+	0	0.0
Total Number of Businesses	5	100.0
Mean Number of Boats Operated		1.2
Difference of Mean to QLD Population Mean (1.3)		-0.1

Note: Standard errors for number of boats operated (sample = 0.2; QLD population = 0.06)

Table 9.10 shows the frequency distribution of the length of boats within the Cooktown TRC. All vessels ranged between 2-14 metres. The mean length of boats was 7.5m, which was 3.9m less than the Queensland average.

Table 9.10 Length of Vessels Operated by Charter Businesses

Length of Boat (metres)	Sample Count	Percent TRC
2-6	2	33.3
7-10	2	33.3
11-14	2	33.3
15-18	0	0.0
18-24	0	0.0
24+	0	0.0
Total Number of Boats	6	100.0
Mean Length of Boats Operated (metres)		7.5
Difference of Mean to QLD Population Mean (11.4)		-3.9
Mean Length of Largest Boat Operated (metres)		7.5
Difference of Mean to QLD Population Mean (11.7)		-4.2

Note: Standard errors for mean length of boats (sample = 1.4; QLD population=0.4) and mean length of largest boats (sample = 1.4; QLD population=0.5).

Value of Production and Location of Sales

Table 9.11 shows the value of charter operations within the Cooktown TRC for the twelve months prior to the survey. The majority of businesses in this TRC produced less than $100,000 (80%), and the remaining 20% earned between $100-200,000. The estimated Gross Value of Production for the Cooktown TRC is $429,000, representing 1.2% of the Queensland business.

Table 9.11 Business Income (Annual value)

Value ($,000)	Sample Count	Sample Percent	Queensland Percent
Less than $100	4	80.0	65.8
$101 - $200	1	20.0	11.5
$201 - $300	0	0.0	7.5
$301 - $400	0	0.0	4.0
$401 - $500	0	0.0	6.0
$501 - $600	0	0.0	2.0
$601 - $700	0	0.0	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	5	100.0	100.0
Mean GVP for TRC			$65,000
Estimated Total GVP for TRC			$429,000
Estimated Total GVP for QLD		$34,419,000	
Percent of Total Queensland Production			1.2%

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

Table 9.12 shows the number of customers chartering trips in the Cooktown TRC. It is estimated that 1,741 people chartered trips from the TRC over the previous year, representing 0.5% of the Queensland business.

Table 9.12 Number of Customers per Year

	Mean Customers per Business	Sample Count	Estimated Total
Cooktown TRC	290.2	1,451	1,741
QLD	1,335	259,930	343,100
Percent of Queensland	0.5%		

Note: Sample count=5. The estimated value is based on estimated 6 businesses (table 8.1)
The estimated QLD count is based on an estimated 257 businesses.

Table 9.13 shows the value and the origin of customers visiting the Cooktown TRC. It is estimated that $429000 was generated by the industry in the TRC. Most customers were from Queensland (37.4%) and other parts of Australia (37.6%). Ten percent of customers were from the local area, and 15% were visitors from overseas.

Table 9.13 Origin and Value of Customers

	Sample Value of Sales	Mean Percent of of Sample	Est. Value of all Sales
Local area	32,500	10.0	42,900
Queensland area	121,550	37.4	160,446
Australians	122,200	37.6	161,304
Overseas	48,750	15.0	64,350
Total Sales	$325,000	100.0	$429,000

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

Business Expenditure

Table 9.14 shows the location of expenditure on business goods and services (excluding salaries and wages) in the previous year from the Cooktown TRC. It is estimated that $223,500 was spent. The majority of expenditure occurred in Cooktown (60.6% or $135,000) and Cairns (28.6% or $64,000).

Table 9.14 Town Location of Business Expenditure
(All costs, excluding salaries and wages)

Location of Expenditure	Sample Value of Expenditure	Percent of Sample	Est. Value Expenditure
Cooktown	102,611	60.6	135,441
Cairns	48,427	28.6	63,921
Brisbane	7,620	4.5	10,058
Victoria	4,233	2.5	5,588
New South Wales	4,064	2.4	5,364
Mossman	1,185	0.7	1,565
Overseas	1,185	0.7	1,565
Total Expenditure	$169,325	100.0	$223,500

Note: Business expenditure includes all non-labour expenditure (ie. 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 9.15 shows the primary towns of residence for charter-owners in the Cooktown TRC. Most charter-owners lived in Cooktown (80.0%) and 20% lived in Bloomfield.

Table 9.15 Town of Residence

Town of Residence	Sample Count	Percent of Sample
Cooktown	4	80.0
Bloomfield	1	20.0
Total	10	100.0

Months employed in the Charter industry

Table 8.16 indicates that all owner-operators within the TRC were employed throughout all months of the previous year.

Table 8.16 Months Employed in the Charter Industry

Months	Owner Operators (%)	All QLD operators
January	100.0	81.0
February	100.0	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 9.17 shows the location of household expenditure from employment in the charter industry. It is estimated that $147,000 was spent on household items by charter operators and their families. The majority of this amount was spent in Cooktown (56.2%) and Cairns (34.5%). There was also some seepage to several other locations around Australia.

Table 9.17 Town Location of Household Expenditure (All commodities and services)

Location of Household Expenditure	Sample Value of Expenditure	Percent of Sample	Est. Value Expenditure
Cooktown	62,551	56.2	82,558
Cairns	38,510	34.6	50,827
Brisbane	3,450	3.1	4,554
VIC	1,892	1.7	2,497
Bloomfield	1,892	1.7	2,497
NSW	1,113	1.0	1,469
Mossman	1,002	0.9	1,322
Total Expenditure	$111,300	100.0	$146,900

Note: The sample total personal income for the Cooktown TRC was $183,000. 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 $111,300. Estimated value of expenditure was calculated by multiplying the sample value of expenditure by 1.32

Source: CRC Reef (2000).

School and Employment Locations of Family Members

The town locations in which family members attended school or were employed are shown in Table 9.18 Cooktown (53.8%) and Bloomfield (30.8%) were the main towns for school and employment of family members.

Table 9.18 School and Employment Locations of Family Members

Location of Employment or School	Sample Count	Percent of Sample
Cooktown	7	53.8
Bloomfield	4	30.8
Cairns	1	7.7
St. George	1	7.7
Total Family Members	41	100.0

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

Social and Demographic Profiles

Table 9.19 provides owner-operator profile information for the Cooktown TRC. Charter operators from this TRC were newer to the area and industry, worked less hours per week, were employed in another industry, were more likely to have completed a trade, were more likely to own their own home, were married, had higher ratios of dependents, no family members in the industry, and earned considerably less than the Queensland average.

Table 9.19. Owner-Operator Profiles for the Cooktown TRC

Profile	Owner-Operators	All QLD Charter operators
Estimated Number of Charter-owners	6	199
Mean age of operators	45.6	45.4
Age range	36-54	20-76
Percent males	100.0	93.8
Mean years resident in town	8.7	19.1
Mean number of years in charter industry	6.0	11.0
Mean hours per week in charter industry	31.0	50.7
Percent moved town to retain employment	20.0	14.0
Percent currently employed in other industry	100.0	46.1
Percent previously employed in other industry	100.0	93.7
Housing tenure (%)		
Rent	0.0	14.1
Mortgage	20.0	33.0
Own home	80.0	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	0.0	3.2
Year 9	0.0	4.7
Year 10	40.0	32.6
Year 11	0.0	10.5
Year 12	60.0	45.8
Percent completed trade or TAFE certificate	100.0	52.2
Percent completed industry or business course	40.0	55.6
Percent with business plan	20.0	53.4
Marital Status		
Percent married or relationship	100.0	88.1
Partner's Income*		
Full-time employment	50.0	52.2
Part-time employment	25.0	23.3
Casual employment	0.0	8.8
Not employed	25.0	15.7
Family Composition		
Mean family size	3.4	3.2
Estimated number of total family members	17	596
Dependency Ratios		
Age Dependency Ratio**	29.4	21.7
Elderly Dependency Ratio	0.0	1.2
Child Dependency Ratio	29.4	20.6
Family Member Industry Dependency Ratio**	0.0	20.4
Gross Individual Income (%)		
Less than $16,000	50.0	39.2
$16,000 - $26,000	25.0	22.2
$26,000 - $36,000	0.0	9.5
$36,000 - $52,000	0.0	13.3
$52,000 - $78,000	25.0	9.5
Over $78,000	0.0	6.3
Average Income ($)	5,500	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.*

10 PORT DOUGLAS TRC

The Port Douglas TRC consists of the main towns of Port Douglas, Mossman and Wonga and is located on the north Queensland Coast.

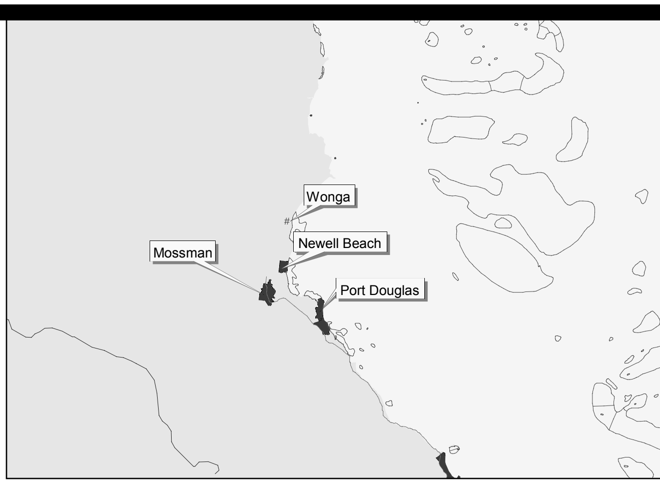

Figure 10.1 Location of the Port Douglas TRC

BUSINESS PROFILES

Location and Use of Ports

Table 10.1 shows the number of license holders within the Port Douglas 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 15 commercial charter operators within this TRC and a 95% certainty that the correct population count of commercial charter operators within the TRC is between 8 and 22. Respondents all used Port Douglas as their homeport. Figure 10.1 shows the geographic location of the Port Douglas TRC.

Table 10.1 Location of Homeports

Town	Adj. Database Count	Sample Count	Estimated Count	Percent within TRC
Port Douglas	10	11	15	100.0
Yorkey's Knob	2	0	0	0.0
Total TRC	12	11	15	100.0
95% Confidence Interval for Estimated TRC Count				8-22
Percent of Total Active License Holders in QLD				5.5%

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 10.2 shows the types of fishing trips chartered from the Port Douglas TRC over the previous year. On day trips the main fishing activities were reef fishing (46%), estuarine (21%) and game fishing (11.8%). On overnight trips the main fishing activity was reef fishing (95%) and there were also some game fishing trips (5%). The main fishing activities undertaken on extended trips were reef-fishing (62.8%) and game fishing (27.1%). Some crabbing (7.1%) and estuarine fishing (2.9%) were also chartered on extended trips.

Table 10.3 shows the number of trips that were chartered from the Port Douglas TRC, and the percentage of trips that were chartered especially for fishing. There was a total of 1,020 day-trips from the TRC, and only 30.9% of these were chartered for fishing. There were 54 days on overnight charters, of which 59.3% were fishing-only trips, and there were 648 days on extended trips from the TRC, of which none were chartered primarily for fishing. On average, 20.2% of charters were fishing-only, which is significantly less than the Queensland average (68.1%).

Table 10.4 shows the percentage of time spent fishing and doing other activities such as diving and cruising, for those trips where fishing was not the only activity. On day trips, fishing (57%), and diving/snorkeling (32.3%) were the major activities. On overnight trips, diving/snorkeling (62.5%) and cruising/sightseeing (27.5%) were the main activities, and fishing only represented 10% of activities. Other activities such as transportation (60.7%), diving/snorkeling (37.3%) and fishing (45.8%) were the predominant activities on extended trips.

Table 10.5 shows that the peak months for charter activity within the Port Douglas TRC were July to November, similar to the Queensland-wide peak season.

Location of Resource Use

Figure 10.2 shows the location of resource use by commercial charter operators in the Karumba TRC. The location of resource use is mostly on the reefs adjacent to the township of Port Douglas, and those reefs to the north of the town.

Table 10.2 Type of Fishing Activity (during the last 12 months)

Fishing Type	Day trips: Mean % Time within TRC	Day trips: Mean % Time QLD	Overnight trips: Mean % Time within TRC	Overnight trips: Mean % Time QLD	Extended trips: Mean % Time within TRC	Extended trips: Mean % Time QLD
Reef (bottom fishing)	46.0	47.5	95.0	66.0	62.8	51.2
Game (pelagic)	11.8	18.8	5.0	20.3	27.1	31.1
Estuary	21.0	26.8	0.0	11.6	2.9	12.5
Crabbing	0.0	0.5	0.0	0.2	7.1	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

Table 10.3 Number of Charter Trips (during the last 12 months)

Type	Mean within TRC	QLD Mean
Day Trips		
Mean number of day-trips (per business)	92.73	85.3
Mean number of fishing-only day-trips	28.64	59.9
Total number of day-trips	1020.0	16,976
Total number of fishing-only day-trips	315.0	11,919
Percentage fishing-only trips	30.9%	70.2%
Overnight Trips		
Mean number of overnight trips (per business)	2.45	5.39
Mean number of fishing-only overnight-trips	1.45	3.34
Total number of days on overnight trips	54.0	1,072
Total number of fishing-only days on overnight trips	32.0	665
Percentage fishing-only trips	59.3%	62.0%
Extended Trips		
Mean number of extended-trips	8.55	6.9
Mean number of fishing-only extended-trips	0.0	4.49
Total number of days on extended trips	648	6,881
Total number of fishing-only days on extended trips	0.0	4,385
Percentage fishing-only trips	0.0%	66.1%
Mean number of days away (per business)	152.9	121.3
TOTAL days charter	1722	16,969
Percentage charter- fishing only	20.2%	68.1%

Table 10.4 Charter Activities During Last 12 Months

Type	Within TRC	QLD Mean
Day Trips		
% time spent fishing	57.0	52.9
% time spent diving/snorkeling	32.3	13.1
% time spent cruising/sightseeing	4.7	17.5
% time spent sailing	0.0	0.4
% time spent whale & dolphin watching	0.0	4.2
% time spent doing other activities	5.9	11.9
Overnight Trips		
% time spent fishing	10.0	51.2
% time spent diving/snorkeling	62.5	22.9
% time spent cruising/sightseeing	27.5	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	45.8	51.2
% time spent diving/snorkeling	37.3	31.1
% time spent cruising/sightseeing	10.8	12.5
% time spent sailing	0.0	0.6
% time spent whale & dolphin watching	0.0	0.0
% time spent doing other activities	60.7	4.6

Table 10.5 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	3	27.3	26.9
July	10	90.9	37.3
August	5	45.5	37.3
September	4	36.4	44.0
October	6	54.4	48.7
November	5	45.5	35.2
December	1	9.1	25.9

Charter Industry Businesses

Table 10.6 identifies the number of charter operators within the Port Douglas TRC. The majority of businesses had between 2-3 fulltime employees, and an average of 2.8 fulltime equivalent employees. In summary it is estimated that there were 47 people employed in the charter industry within the Port Douglas TRC over the previous year.

Business Ownership and Size

Table 10.7 shows the number of years the current operator had owned the charter business. On average, businesses within the Port Douglas TRC had been owned for 8.0 years, which is 1 year more than the Queensland average. Nearly 50% of businesses (45.5%) had been owned for less than 5 years.

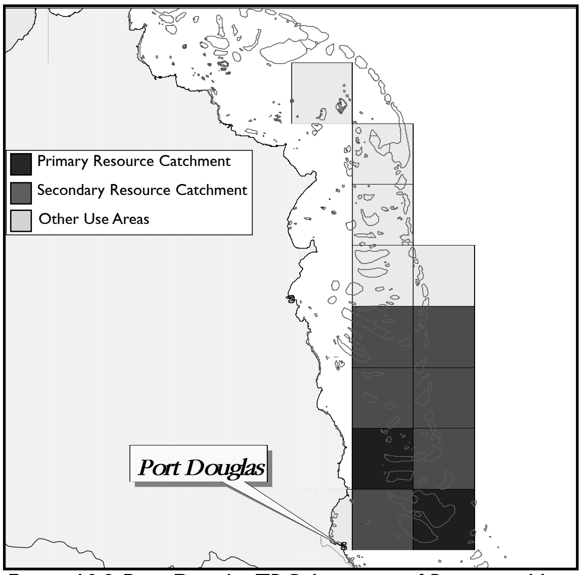

Figure 10.2 Port Douglas TRC: Location of Resource Use

Table 10.6 Number of Employees

Number of Employees	Full-Time Count	Full-Time Percent	Part-Time Count	Part-Time Percent	Casual Count	Casual Percent
Nil	1	9.1	8	72.7	6	54.5
1	2	18.2	1	9.1	4	36.4
2-3	6	54.6	0	0.0	1	9.1
4-5	1	9.1	1	9.1	0	0.0
5+	1	9.1	1	9.1	0	0.0
Total Businesses	11	100.0	11	100.0	11	100.0
Total Charter operators	31		10		6	
Mean Number of Employees per Business				3.5		
Mean Number of Full-time Employees per Business				2.8		
Mean Number of Part-time & Casual Employees per Business				1.4		
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.

Table 10.7 Number of Years of Current Ownership of the Charter Business

Number of Years	Sample Count	Percent within TRC	Cumulative Percent
1-5	5	45.5	45.5
6-10	3	27.3	72.7
11-15	3	27.3	100.0
15+	0	0.0	0.0
Total	11	100.0	100.0
Mean Number of Years owned or operated			8.0
Difference of TRC Mean to QLD Population Mean (7.0)			+1.0

Note: Standard errors for number of years ownership (sample = 1.3; QLD population = 0.5).

Table 10.8 shows the number of years the charter business had been operating. Most businesses had been operating between 6-10 years. The average number was 9.7 years which was 1.4 years more than the Queensland average (8.3 years).

Table 10.8 Number of Years Business has been Operating

Number of Years	Sample Count	Percent within TRC	Cumulative Percent
1-5	4	36.4	36.4
6-10	5	45.5	81.8
11-15	1	9.1	90.9
15+	1	9.1	100.0
Total	11	100.0	100.0
Mean Number of Years owned or operated			9.7
Difference of Mean to Population Mean (8.3)			+1.4

Note: Standard errors for number of years operated (sample = 2.0; QLD population = 0.6)

Table 10.9 shows the number of boats operated by businesses in the Port Douglas TRC. All charter businesses operated one boat, which is slightly less than the Queensland average (1.3 boats).

Table 10.9 Number of Boats Operated by Each Business

Number of Boats	Sample Count	Percent TRC
1	11	100.0
2	0	0.0
3+	0	0.0
Total Number of Businesses	11	100.0
Mean Number of Boats Operated		1.0
Difference of Mean to QLD Population Mean (1.3)		-0.3

Note: Standard errors for number of boats operated (sample = 0.0; QLD population = 0.06)

Table 10.10 shows the frequency distribution of the length of boats within the Port Douglas TRC. Most vessels were between 15-18 metres (33.3%), with 18.2% of boats being larger than 24 metres. The average length of boat (16.0m) was 4.6m longer than the Queensland average.

Table 10.10 Length of Vessels Operated by Charter Businesses

Length of Boat (metres)	Sample Count	Percent TRC
2-6	2	18.2
7-10	0	0.0
11-14	1	5.6
15-18	6	33.3
18-24	0	0.0
24+	2	18.2
Total Number of Boats	11	100.0
Mean Length of Boats Operated (metres)		16.0
Difference of Mean to QLD Population Mean (11.4)		+4.6
Mean Length of Largest Boat Operated (metres)		16.0
Difference of Mean to QLD Population Mean (11.7)		+4.3

Note: Standard errors for mean length of boats (sample = 1.9; QLD population=0.4) and mean length of largest boats (sample =; QLD population=0.5).

Value of Production and Location of Sales

Table 10.11 shows the value of sales for charter operations within the Port Douglas TRC. The profile for the TRC was generally widely distributed, and 9.1% of businesses earned more than \$1 million. Businesses in the Port Douglas TRC were different to the overall profile for Queensland since only 18.2% of businesses earned less than \$100,000 compared to 65.8% for Queensland. The mean Gross Value of Production (GVP) for the TRC was \$325,000, and it is estimated that the total GVP for the TRC was \$4,719,000, representing 13.7% of the Queensland industry.

Table 10.11 Business Income(Annual value)

Value ($,000)	Sample Count	Sample Percent	Queensland Percent
Less than $100	2	18.2	65.8
$101 - $200	3	27.3	11.5
$201 - $300	2	18.2	7.5
$301 - $400	0	0.0	4.0
$401 - $500	2	18.2	6.0
$501 - $600	0	0.0	2.0
$601 - $700	1	9.1	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	1	9.1	0.5
Total	11	100.0	100.0
Mean GVP for TRC			$325,000
Estimated Total GVP for TRC			$4,719,000
Estimated Total GVP for QLD		$34,419,000	
Percent of Total Queensland Production			13.7%

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

Table 10.12 shows the number of customers per year to charter trips from the Port Douglas TRC. It is estimated that 22,300 people were customers of the charter industry in this TRC, representing 6.5% of the customers in Queensland.

Table 10.12 Number of Customers per Year

	Mean Customers per Business	Sample Count	Estimated Total
Port Douglas TRC	1,487	14,873	22,309
QLD	1,335	259,930	343,100
Percent of Queensland	6.5%		

Note: Sample count=10. The estimated value is based on estimated 15 businesses (table 2.1)
The estimated QLD count is based on an estimated 257 businesses.

Table 10.13 shows the value of sales and the origin of customers visiting the Port Douglas TRC over the previous year. Most customers were overseas visitors (37.2%), and only 4% were from the local area. The remaining customers came from Queensland (24.1%) and other parts of Australia (34.7%). It is estimated that $4.7 million is generated from the charter industry in the Port Douglas TRC.

Table 10.13 Origin and Value of Sales

	Sample Value of Sales	Mean % of Sample	Est. Value of all Sales
Local area	143,000	4.0	188,760
Queensland area	861,575	24.1	1,137,279
Outside Australia	1,240,525	34.7	1,637,493
Overseas	1,329,900	37.2	1,755,468
Total Sales	$3,575,000	100.0	$4,719,000

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

Business Expenditure

Table 10.14 shows the location of business expenditure of charter businesses in the Port Douglas TRC over the previous year. It is estimated that approximately $2.5 million was spent by businesses on business goods and services (excluding salaries and wages). The majority of this expenditure occurred in Port Douglas (60.3%) and Cairns (25.1%). Nearly 15% was spent in several other locations in Australia and overseas.

Table 10.14 Town Location of Business Expenditure
(All costs, excluding salaries and wages)

Location of Expenditure	Sample Value of Expenditure	Percent of Sample	Est. Value Expenditure
Port Douglas	1,123,133	60.3	1,482,536
Cairns	467,506	25.1	617,109
Mossman	83,816	4.5	110,637
Brisbane	33,526	1.8	44,255
Victoria	33,526	1.8	44,255
New South Wales	31,664	1.7	41,796
Smithfield	18,626	1.0	24,586
Townsville	13,038	0.7	17,210
Mackay	13,038	0.7	17,210
Rockhampton	9,313	0.5	12,293
Trinity Beach	9,313	0.5	12,293
Clifton Beach	9,313	0.5	12,293
Kirk River	7,450	0.4	9,834
West Hill	5,588	0.3	7,376
Overseas	5,588	0.3	7,376
Total Expenditure	$1,862,575	100.0	$2,458,600

Note: Business expenditure includes all non-labour expenditure (ie. 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 10.15 shows the towns of residence for charter operators in the Port Douglas TRC. Most lived in Port Douglas (70%), although some lived as far away as Yeppoon (10%).

Table 10.15 Town of Residence

Town of Residence	Sample Count	Percent of Sample
Port Douglas	7	70.0
Trinity Beach	1	10.0
Yeppoon	1	10.0
Terranora	1	10.0
Total	10	100.0

Months Employed in the Charter Industry

Table 10.16 indicates that all owner-operators within the Port Douglas TRC were employed in the charter industry between July and November during the 12 months prior to the survey. The majority of charter operators were generally employed for most months of the year.

Table 10.16 Months Employed in the Charter Industry During Past 12 Months

Months	Owner Operators %	All QLD Operators
January	80.0	81.0
February	90.0	81.5
March	90.0	85.7
April	90.0	89.4
May	90.0	92.6
June	90.0	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	90.0	86.8

Table 10.17 shows the location of household expenditure from employment in the charter industry. It is estimated that $0.3 million was spent on household items by charter operators and their families in the Port Douglas TRC. The majority of this amount was spent in Port Douglas (48.3%) and Cairns (24.8%). Nearly 27% of household expenditure was spent in 9 other locations in Queensland and Victoria.

Table 10.17 Town Location of Household Expenditure (All commodities and services)

Location of Household Expenditure	Sample Value of Expenditure	Percent of Sample	Est. Value Expenditure
Port Douglas	103,362	48.3	136,496
Cairns	53,072	24.8	70,085
Yeppoon	18,190	8.5	24,021
Mossman	15,408	7.2	20,347
Smithfield	13,482	6.3	17,804
Rockhampton	4,922	2.3	6,500
Bilinga	1,284	0.6	1,696
Brisbane	1,070	0.5	1,413
Terranora	1,284	0.6	1,696
Townsville	1,070	0.5	1,413
Victoria	1,284	0.6	1,696
Total Expenditure	$214,000	100.0	$282,600

Note: The sample total personal income for the Port Douglas TRC was $352,000. 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 $214,000. Estimated value of expenditure was calculated by multiplying the sample value of expenditure by 1.32

Source: CRC Reef (2000).

School and Employment Locations of Family Members

The town locations in which family members attended school or were employed are shown in Table 10.18. Port Douglas (64.3%) and Mossman (21.4%) were the main towns for school and employment of family members.

Table 10.18 School and Employment Locations of Family Members

Location of Employment or School	Sample Count	Percent of Sample
Port Douglas	18	64.3
Mossman	6	21.4
Yeppoon	2	7.1
Brisbane	1	3.6
Maryborough	1	3.6
Total Family Members	28	100.0

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

Social and Demographic Profiles

Table 10.19 provides profile information for charter operators from the Port Douglas TRC. Operators from this TRC tended to have been in the industry longer, have moved to retain their employment, were less likely to work in another industry, were more likely to have a mortgage, less likely to have completed year 12, more likely to have completed a business course and earn more than the average Queensland charter operator.

Table 10.19 Owner-Operator Profiles for the Port Douglas TRC

Profile	Owner-Operators	All QLD Operators
Estimated Number of Charter-owners	15	191
Mean age of fisher	45.9	45.4
Age range	34-64	20-76
Percent males	88.9	93.8
Mean years resident in town	14.7	19.1
Mean number of years in charter industry	12.6	11.0
Mean hours per week in charter industry	54.7	50.7
Percent moved town to retain employment	30.0	14.0
Percent currently employed in other industry	20.0	46.1
Percent previously employed in other industry	100.0	93.7
Housing tenure (%)		
Rent	11.1	14.1
Mortgage	55.6	33.0
Own home	22.2	50.8
Other (eg, live with parents, on boat)	11.1	2.0
Educational		
Year completed school (%)		
Primary school	22.2	3.2
Year 8	0.0	3.2
Year 9	11.1	4.7
Year 10	33.3	32.6
Year 11	11.1	10.5
Year 12	22.2	45.8
Percent completed trade or TAFE certificate	66.7	52.2
Percent completed industry or business course	77.8	55.6
Percent with business plan	37.5	53.4
Marital Status		
Percent married or relationship	77.8	88.1
Partner's Income*		
Full-time employment	28.6	52.2
Part-time employment	0.0	23.3
Casual employment	28.6	8.8
Not employed	42.8	15.7
Family Composition		
Mean family size	3.3	3.2
Estimated number of total family members	30	596
Dependency Ratios		
Age Dependency Ratio**	26.7	21.7
Elderly Dependency Ratio	0.0	1.2
Child Dependency Ratio	26.7	20.6
Family Member Industry Dependency Ratio***	11.8	20.4
Gross Individual Income (%)		
Less than $16,000	0.0	39.2
$16,000 - $26,000	50.0	22.2
$26,000 - $36,000	25.0	9.5
$36,000 - $52,000	0.0	13.3
$52,000 - $78,000	0.0	9.5
Over $78,000	25.0	6.3
Average Income ($)	39,250	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.*

11 CAIRNS TRC

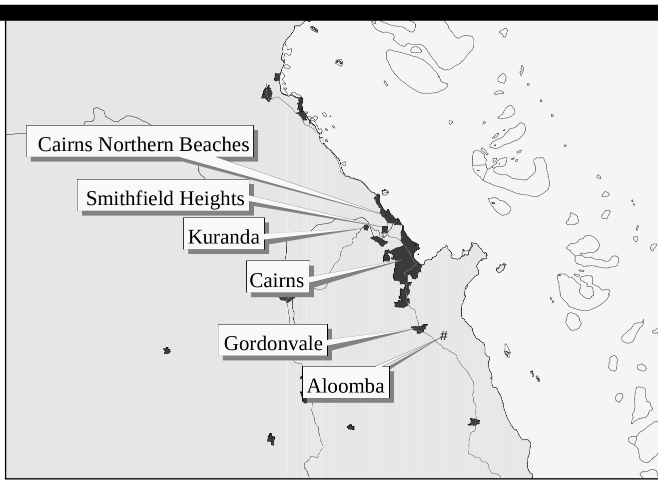

Figure 11.1 Location of the Cairns TRC

The Cairns TRC consists of the main urban centre of Cairns and several smaller surrounding urban centres including those of the Northern Beaches, Gordonvale, Kuranda and Smithfield.

BUSINESS PROFILES

Location and Use of Ports

Table 11.1 shows the number of license holders within the Cairns 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 40 commercial charter operators within this TRC and a 95% certainty that the correct population count of commercial charter operators within the TRC is between 29 and 51. Respondents reported that they used Cairns (90%), the Daintree (7%) and Deeral (3%) as their homeports. Figure 1 shows the geographic location of the Cairns TRC.

Table 11.1 Location of Homeports

Town	Adj. Database Count	Sample Count	Estimated Count	Percent within TRC
Cairns	21	27	36	90.0
Daintree	0	2	3	7.0
Deeral	1	1	1	3.0
Clifton Beach	2	0	0	0.0
Edmonton	3	0	0	0.0
Kuranda	1	0	0	0.0
Midge Point	1	0	0	0.0
Mossman	3	0	0	0.0
Palm Beach	1	0	0	0.0
Trinity Beach	4	0	0	0.0
Yungaburra	1	0	0	0.0
Total TRC	40	30	40	100.0
95% Confidence Interval for Estimated TRC Count				29-51
Percent of Total Active License Holders in QLD				15.1%

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 11.2 shows the types of fishing activity on charters from the Cairns TRC for the previous year. The main fishing activities on day trips were estuarine (39.8%), game fishing (37.6%) and reef fishing (13.7%). These activities were also the most prevalent on overnight trips (22.7%, 44.4% and 30.5% respectively) and on extended trips (19.7%, 49.9% and 30.4% respectively).

Table 11.3 shows the number of trips chartered from the Cairns TRC and the percentage that were chartered primarily for fishing. Most trips were day trips (4,046 days) and 78.6% of these were fishing-only trips. There were 228 days spent on overnight trips and 68.4% were fishing-only trips. Some 1,066 days were spent on extended trips, and 38.9% were fishing-only trips, which is lower than the Queensland average for extended trips (66.1%).

Table 11.4 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, fishing was the main activity (66.3%), although time was also spent diving and snorkeling (12.4%), cruising and sightseeing (13.1%), sailing (2.4%), whale watching (0.8%) and doing other activities (5.1%). On overnight and extended trips fishing was the major activity (69.7% and 51.2% respectively).

Table 11.5 shows that the peak months for charter activity within the Cairns TRC were July to November, similar to that of the Queensland peak season.

Table 11.2 Type of Fishing Activity (during the last 12 months)

	Day trips		Overnight trips		Extended trips	
Fishing Type	Mean % Time within TRC	Mean % Time QLD	Mean % Time within TRC	Mean % Time QLD	Mean % Time within TRC	Mean % Time QLD
Reef (bottom fishing)	13.7	47.5	30.5	66.0	30.4	51.2
Game (pelagic)	37.6	18.8	44.4	20.3	49.9	31.1
Estuary	39.8	26.8	22.7	11.6	19.7	12.5
Crabbing	1.8	0.5	0.5	0.2	0.0	0.5
Other	7.1	6.4	1.8	2.0	0.0	4.6
Total Sample	100.0	100.0	100.0	100.0	100.0	100.0

Table 11.3 Number of Charter Trips (during the last 12 months)

Type	Mean within TRC	QLD Mean
Day Trips		
Mean number of day-trips (per business)	134.9	85.3
Mean number of fishing-only day-trips	105.97	59.9
Total number of day-trips	4,046	16,976
Total number of fishing-only day-trips	3,179	11,919
Percent fishing-only trips	78.6%	70.2%
Overnight Trips		
Mean number of overnight trips (per business)	3.8	5.39
Mean number of fishing-only overnight-trips	2.6	3.34
Total number of days on overnight trips	228	1,072
Total number of fishing-only days on overnight trips	156	665
Percent fishing-only trips	68.4%	62.0%
Extended Trips		
Mean number of extended-trips	8.13	6.9
Mean number of fishing-only extended-trips	3.17	4.49
Total number of days on extended trips	1066	6,881
Total number of fishing-only days on extended trips	415	4,385
Percent fishing-only trips	38.9%	66.1%
Mean number of days away (per business)	1,78.3	121.3
TOTAL days charter	5,340	16,969
Percent charter- fishing only	70.2%	68.1%

Table 11.4 Other Activities on Charters (during the last 12 months)

Type	Within TRC	QLD Mean
Day Trips		
% time spent fishing	66.3	52.9
% time spent diving/snorkeling	12.4	13.1
% time spent cruising/sightseeing	13.1	17.5
% time spent sailing	2.4	0.4
% time spent whale & dolphin watching	0.8	4.2
% time spent doing other activities	5.1	11.9
Overnight Trips		
% time spent fishing	69.7	51.2
% time spent diving/snorkeling	8.3	22.9
% time spent cruising/sightseeing	22.0	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	51.2	51.2
% time spent diving/snorkeling	14.0	31.1
% time spent cruising/sightseeing	30.8	12.5
% time spent sailing	0.0	0.6
% time spent whale & dolphin watching	0.0	0.0
% time spent doing other activities	4.0	4.6

Table 11.5 Peak Charter Months During Past 12 Months

Months	Sample Count	Percent within TRC	Percent of QLD Fishery
January	7	23.3	21.8
February	3	10.0	6.2
March	4	13.3	8.8
April	5	16.7	16.6
May	5	16.7	17.6
June	8	26.7	26.9
July	14	46.7	37.3
August	14	46.7	37.3
September	15	50.0	44.0
October	15	50.0	48.7
November	13	43.3	35.2
December	8	26.7	25.9

Location of Resource Use

Figure 11.2 shows the location of resource use by commercial charter operators in the Cairns TRC. The location of resource use is predominately on the reefs closest to Cairns as well as around Lizard Island. The secondary resource catchment extends from Princess Charlotte Bay in the north to Lucinda in the South.

Charter Industry Businesses

Table 11.6 displays the number of charter operators within the Cairns TRC. The majority of businesses had between 1-3 fulltime employees, and an average of 1.5 fulltime equivalent employees. In summary it is estimated that there were 86 people employed in the charter industry.

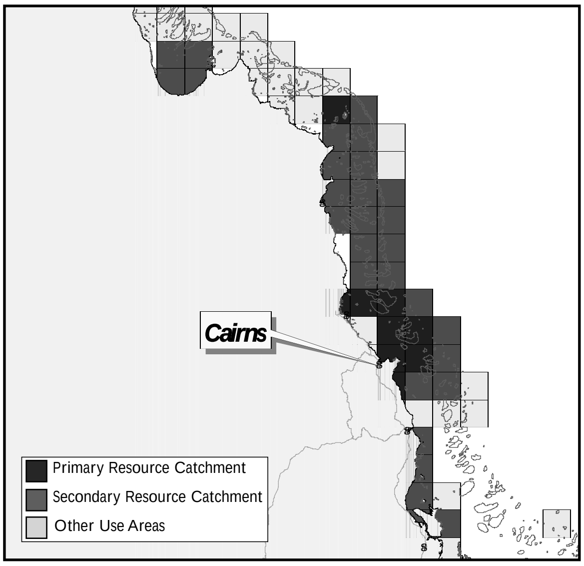

Figure 11.2 Cairns TRC: Location of Resource Use

Table 11.6 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	3.3	23	76.7	16	53.3
1	17	56.7	5	16.7	7	23.3
2-3	11	36.6	2	6.7	6	20.0
4-5	1	3.3	0	0.0	0	0.0
5+	0	0.0	0	0.0	1	3.3
Total Businesses	30	100.0	30	100.0	30	100.0
Total Employees	44		9		33	
Mean Number of Employees per Business				2.2		
Mean Number of Full-time Employees per Business				1.5		
Mean Number of Part-time & Casual Employees per Business				3.8		
Estimated Number Employed within the TRC				86		

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 11.7 shows the number of years the current owner or operator had owned the charter business. Most businesses had been owned between 1-5 years, and 80% of businesses had been owend for less than 10 years. On average, businesses within the Cairns TRC had been owned for 7.5 years, which was similar to the average Queensland business (7 years).

Table 11.7 Number of Years of Current Ownership of the Charter Business

Number of Years	Sample Count	Percent within TRC	Cumulative Percent
1-5	13	43.3	43.3
6-10	11	36.3	80.0
11-15	4	13.3	93.3
15+	2	6.6	100.0
Total	30	100.0	100.0
Mean Number of Years owned or operated			7.5
Difference of TRC Mean to QLD Population Mean (7.0)			+.05

Note: Standard errors for number of years ownership (sample = 0.9; QLD population = 0.5).

Table 11.8 shows that the average number of years the charter business had been operating was 7.7 years, which was only 0.6 years less than the average Queensland charter businesses (8.3 years).

Table 11.8 Number of Years Business has been Operating

Number of Years	Sample Count	Percent within TRC	Cumulative Percent
1-5	13	46.7	46.7
6-10	10	33.0	80.0
11-15	4	13.2	93.3
15+	2	6.6	100.0
Total	29	100.0	100.0
Mean Number of Years owned or operated			7.7
Difference of Mean to Population Mean (8.3)			-0.6

Note: Standard errors for number of years operated (sample = 1.1; QLD population = 0.6)

Table 11.9 shows the number of boats owned by businesses in the Cairns TRC. The majority of charter businesses operated one boat (80.0%), and 6.7% owned three vessels. The average number of boats owned in the Cairns TRC (1.3 boats) was the same as the Queensland average (1.3 boats).

Table 11.9 Number of Boats Operated by Charter Businesses

Number of Boats	Sample Count	Percent TRC
1	24	80.0
2	4	13.3
3	2	6.7
4+	0	0.0
Total Number of Businesses	30	100.0
Mean Number of Boats Operated		1.3
Difference of Mean to QLD Population Mean (1.3)		0

Note: Standard errors for number of boats operated (sample = 0.1; QLD population = 0.06)
Source: CRC Reef (2000)

Table 11.10 shows the frequency distribution of the length of boats within the Cairns TRC. Most boats were less than six metres in length (44.7%), and 5.2% of boats were greater than 24m in length. The average boat from the Cairns TRC (9.7m) was 1.7m shorter than the average Queensland boat.

Table 11.10 Length of Vessels Operated by Charter Businesses

Length of Boat (metres)	Sample Count	Percent TRC
2-6	17	44.7
7-10	5	13.2
11-14	10	26.3
15-18	3	7.9
18-24	1	2.6
24+	2	5.2
Total Number of Boats	38	100.0
Mean Length of Boats Operated (metres)		9.7
Difference of Mean to QLD Population Mean (11.4)		-1.7
Mean Length of Largest Boat Operated (metres)		10.7
Difference of Mean to QLD Population Mean (11.7)		-1.0

Note: Standard errors for mean length of boats (sample = 0.9; QLD population=0.4) and mean length of largest boats (sample = 1.4; QLD population=0.5).

Value of Production and Location of Sales

Table 11.11 shows the value of charter operations within the Cairns TRC for the twelve months prior to the survey. The profile was similar to the overall profile for Queensland. Some 63.3% of businesses earned less than $100,000, and the remaining 36.4% earned between $100-500,000. The estimated Gross Value of Production (GVP) for this TRC was $4.8 million, representing 14% of the Queensland value.

Table 11.11 Business Income (Annual value)

Value ($,000)	Sample Count	Sample Percent	Queensland Percent
Less than $100	19	63.3	65.8
$101 - $200	3	10.0	11.5
$201 - $300	3	10.0	7.5
$301 - $400	3	10.0	4.0
$401 - $500	2	6.7	6.0
$501 - $600	0	0.0	2.0
$601 - $700	0	0.0	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	30	100.0	100.0
Mean GVP for TRC			$122,000
Estimated Total GVP for TRC			$4,818,000
Estimated Total GVP for QLD			$34,419,000
Percent of Total Queensland Production			14.0%

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

Table 11.12 provides an estimate of the number of customers that chartered trips from the Cairns TRC over the previous 12 months. There were approximately 47,300 customers of the charter industry for this TRC, representing some 13.8% of Queensland's customers.

Table 11.12 Number of Customers per Year

Origin	Mean Customers per Business	Sample Count	Estimated Total
Cairns TRC	1,182	31,900	47,300
QLD	1,335	259,930	343,100
Percent of Queensland	13.8%		

Table 11.13 shows the origin and associated value of customers visiting the Cairns TRC for the sample of businesses. It is estimated that the industry was worth $4.8 million over the year, and the majority of this income was derived from overseas visitors (48.5%).

Table 11.13 Origin and Value of Customers

	Sample Value of Sales	Mean Percent of Sample	Est. Value of all Sales
Local area	394,200	10.8	520,344
Queensland area	616,850	16.9	814,242
Australians	868,700	23.8	1,146,684
Overseas	1,770,250	48.5	2,336,730
Total Sales	$3,650,000	100.0	$4,818,000

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

Business Expenditure

Table 11.14 shows that approximately $6.4 million was spent by businesses in the Cairns TRC on business goods and services (excluding salaries and wages) over the previous year. The majority of this expenditure occurred in Cairns (85.4% or $5.4 million). Several other towns in Queensland, other parts of Australia and locations overseas were also recipients of this expenditure.

Table 11.14 Town Location of Business Expenditure (All costs, excluding salaries and wages)

Location of Expenditure	Sample Value of Expenditure	Percent of Sample	Est. Value Expenditure
Cairns	4,114,572	85.4	5,431,269
Townsville	197,538	4.1	260,752
Mossman	144,540	3.0	190,794
Atherton	77,088	1.6	101,757
Brisbane	62,634	1.3	82,677
Mackay	52,998	1.1	69,958
Cooktown	24,090	0.5	31,799
Deeral	4,818	0.1	6,360
Ingham	14,454	0.3	19,079
Innisfail	4,818	0.1	6,360
New South Wales	38,544	0.8	50,878
Overseas	4,818	0.1	6,360
Port Douglas	9,636	0.2	12,720
Proserpine	9,636	0.2	12,720
South Australia	4,818	0.1	6,360
Babinda	4,818	0.1	6,360
Tasmania	38,544	0.8	50,878
Victoria	4,818	0.1	6,360
Total Expenditure	$4,818,000	100.0	$6,359,800

Note: Business expenditure includes all non-labour expenditure (ie. 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 11.15 shows the primary towns of residence for operators within the Cairns TRC. Most charter operators resided within Cairns (76.7%), although some operators lived as far away as Tasmania (3.3%).

Table 11.15 Towns of Residence

Town of Residence	Sample Count	Percent of Sample
Cairns	23	76.7
Miriwinni	1	3.3
Midge Point	1	3.3
Edmonton	1	3.3
Tasmania	1	3.3
Daintree	1	3.3
Deeral	1	3.3
Yungaburra	1	3.3
Total	30	100.0

Months Employed in the Charter Industry

Table 11.16 indicates that the majority of owner-operators within the Cairns TRC were employed during most months of the year, and that all operators were employed in November.

Table 11.16 Months Employed in the Charter Industry During Past 12 Months

Months	Owner Operators %	All QLD Operators
January	90.0	81.0
February	90.0	81.5
March	93.3	85.7
April	93.3	89.4
May	93.3	92.6
June	93.3	92.6
July	93.3	92.6
August	93.3	93.7
September	93.3	95.2
October	96.7	93.7
November	100.0	91.5
December	96.7	86.8

Table 11.17 shows the location of household expenditure by operators and their families from the Cairns TRC. It is estimated that $782,000 was spent on household commodities and services, and as expected, most of this was spent in Cairns (82.2%). Several other towns in Queensland and Australia benefited from this expenditure, such as Mossman ($38,000), Townsville ($27,000) and Mackay ($15,000).

School and Employment Locations of Family Members

The town locations in which family members attended school or were employed are shown in Table 11.18. Most family members attended school or were employed in Cairns (56%) as well as several other Queensland towns, including Townsville (5.2%), Brisbane (3.9%), Cooktown (2.6%), and Gold Coast (1.3%).

Table 11.17 Town Location of Household Expenditure (All commodities and services)

Location of Household Expenditure	Sample Value of Expenditure	Percent of Sample	Est. Value Expenditure
Cairns	487,035	82.2	642,804
Mossman	29,033	4.9	38,318
Townsville	20,738	3.5	27,370
Mackay	11,258	1.9	14,858
Atherton	9,480	1.6	12,512
Babinda	7,110	1.2	9,384
Innisfail	5,925	1.0	7,820
Proserpine	5,333	0.9	7,038
Brisbane	3,555	0.6	4,692
Yungaburra	2,370	0.4	3,128
Ingham	2,370	0.4	3,128
Gordonvale	1,185	0.2	1,564
Miriwinni	1,185	0.2	1,564
Tasmania	1,778	0.3	2,346
Midge Point	593	0.1	782
Airlie Beach	593	0.1	782
NSW	593	0.1	782
Port Douglas	593	0.1	782
Total Expenditure	$592,500	100.0	$782,000

Note: The sample total personal income for the Cairns TRC was $974,000. 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 $592,500. Estimated value of expenditure was calculated by multiplying the sample value of expenditure by 1.32

Source: CRC Reef (2000).

Table 11.18 School and Employment Locations of Family Members

Location of Employment or School	Sample Count	Percent of Sample
Cairns	56	72.7
Miriwinni	5	6.5
Townsville	4	5.2
Brisbane	3	3.9
Wonga	3	3.9
Cooktown	2	2.6
Midge Point	2	2.6
Edmonton	1	1.3
Gold Coast	1	1.3
Total Family Members	77	100.0

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

Social and Demographic Profiles

Table 11.19 provides profile information for owner-operators from the Cairns TRC. These operators tended to work longer hours per week, were less likely to be employed in another industry, were more likely to have a mortgage and earned more than the average Qeensland charter operator.

Table 11.19 Owner-Operator Profiles for the Cairns TRC

Profile	Owner-Operatorsa	All QLD Charter operators
Estimated Number of Charter-owners	30	191
Mean age of operators	42.2	45.4
Age range	20-58	20-76
Percent males	90.0	93.8
Mean years resident in town	18.7	19.1
Mean number of years in charter industry	12.8	11.0
Mean hours per week in charter industry	65.0	50.7
Percent moved town to retain employment	16.7	14.0
Percent currently employed in other industry	26.7	46.1
Percent previously employed in other industry	96.7	93.7
Housing tenure (%)		
Rent	16.7	14.1
Mortgage	40.0	33.0
Own home	36.7	50.8
Other (eg, live with parents, on boat)	6.6	2.0
Educational		
Year completed school (%)		
Primary school	0.0	3.2
Year 8	0.0	3.2
Year 9	10.3	4.7
Year 10	17.2	32.6
Year 11	31.0	10.5
Year 12	41.4	45.8
Percent completed trade or TAFE certificate	51.9	52.2
Percent completed industry or business course	46.4	55.6
Percent with business plan	40.0	53.4
Marital Status		
Percent married or relationship	83.3	88.1
Partner's Income*		
Full-time employment	45.8	52.2
Part-time employment	29.2	23.3
Casual employment	4.2	8.8
Not employed	20.8	15.7
Family Composition		
Mean family size	2.9	3.2
Estimated number of total family members	83	596
Dependency Ratios		
Age Dependency Ratio*	22.9	21.7
Elderly Dependency Ratio	0.0	1.2
Child Dependency Ratio	22.9	20.6
Family Member Industry Dependency Ratio**	17.9	20.4
Gross Individual Income (%)		
Less than $16,000	16.7	39.2
$16,000 - $26,000	33.3	22.2
$26,000 - $36,000	0.0	9.5
$36,000 - $52,000	33.3	13.3
$52,000 - $78,000	16.7	9.5
Over $78,000	0.0	6.3
Average Income ($)	33,800	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.*

12 TOWNSVILLE TRC

The Townsville TRC consists of the main urban centre of Townsville and Magnetic Island.

BUSINESS PROFILES

Location and Use of Ports

Table 12.1 shows the number of license holders within the Townsville 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 20 commercial charter operators within this TRC and a 95% certainty that the correct population count of commercial charter operators within the TRC is between 12 and 28. Figure 1 shows the geographic location of the Townsville TRC.

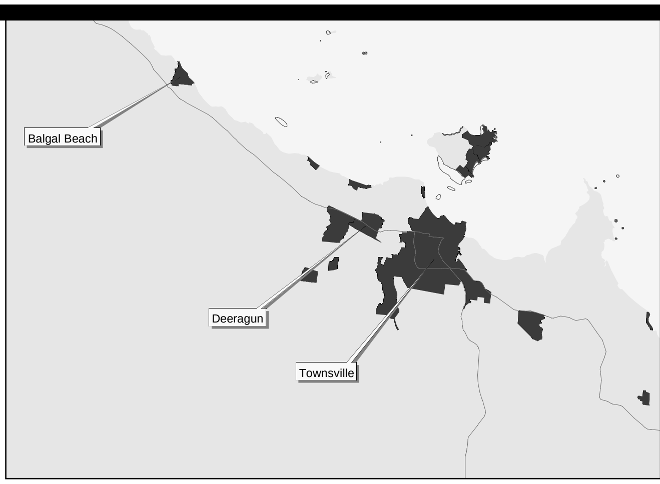

Figure 12.1 Location of the Townsville TRC

Table 12.1 Location of Homeports

Town	Adj. Database Count	Sample Count	Estimated Count	Percent within TRC
Townsville	16	13	17	85.0
Magnetic Island	4	2	3	15.0
Charters Towers	1	0	0	0.0
Total	21	15	20	100.0
95% Confidence Interval for Estimated TRC Count				12-28
Percent of Total Active License Holders in QLD				8.5%

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 12.2 shows the types of fishing trips chartered from the Townsville TRC over the previous year. On day trips the main fishing activities chartered were estuarine (40%), reef (35%) and game (25%) fishing. On overnight trips the main fishing activities were reef fishing (67.9%) and game fishing (32.1%), and similarly on extended trips, reef fishing (50%) and game fishing (50%) were the main fishing activities.

Table 12.3 displays the number of trips chartered from the Townsville TRC, and the proportion of trips that were chartered primarily for fishing. Day trips were the most common trips chartered (1228 days), and 89.8% were for fishing only. This is significantly more than the Queensland percentage of 70.2% for day trips. Over 66% of overnight trips and 79.3% of extended trips were fishing-only trips. In summary, trips chartered from the Townsville TRC were chartered more for fishing (85.7%) than other charters in Queensland (68.1%).

Table 12.4 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 fishing was the major activity (73%), and on overnight trips the main activities were fishing (35%), diving and snorkeling (34.7%) and cruising and sightseeing (30.0%). On extended trips there was no fishing, and the only activity was diving and snorkeling.

Table 12.5 shows that the peak months for charter activity within the Townsville TRC were June to November, similar to the peak season for the rest of the Queensland industry.

Location of Resource Use

Figure 12.2 shows the location of resource use by commercial charter operators in the Townsville TRC. The location of resource use is mostly around Magnetic Island, Cleveland Bay, and the outer reefs closest to Townsville. The secondary resource catchment extends to Hinchinbrook Island.

Table 12.2 Type of Fishing Activity (during the last 12 months)

	Day trips		Overnight trips		Extended trip	
Fishing Type	Mean % Time within TRC	Mean % Time QLD	Mean % Time within TRC	Mean % Time QLD	Mean % Time within TRC	Mean % Time QLD
Reef (bottom fishing)	35.0	47.5	67.9	66.0	50.0	51.2
Game (pelagic)	25.0	18.8	32.1	20.3	50.0	31.1
Estuary	40.0	26.8	0.0	11.6	0.0	12.5
Crabbing	0.0	0.5	0.0	0.2	0.0	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

Note: Sample size n=15. All columns are independent.

Table 12.3 Number of Charter Trips (during the last 12 months)

Type	Mean within TRC	QLD Mean
Day Trips		
Mean number of day-trips (per business)	81.9	85.3
Mean number of fishing-only day-trips	73.2	59.9
Total number of day-trips	1228	16,976
Total number of fishing-only day-trips	1098	11,919
Percentage of fishing-only trips	89.8%	70.2%
Overnight Trips		
Mean number of overnight trips (per business)	3.73	5.39
Mean number of fishing-only overnight-trips	2.47	3.34
Total number of days on overnight trips	112	1,072
Total number of fishing-only days on overnight trips	74	665
Percentage of fishing-only trips	66.1%	62.0%
Extended Trips		
Mean number of extended-trips	3.87	6.9
Mean number of fishing-only extended-trips	3.07	4.49
Total number of days on extended trips	352	6,881
Total number of fishing-only days on extended trips	279	4,385
Percentage of fishing-only trips	79.3%	66.1%
Mean number of days away (per business)	102.8	121.3
TOTAL days charter	1692	16,969
Percentage fishing only	85.7%	68.1%

Table 12.4 Charter Activities (during the last 12 months)

Type	Within TRC	QLD Mean
Day Trips		
% time spent fishing	73.0	52.9
% time spent diving/snorkeling	20.0	13.1
% time spent cruising/sightseeing	7.0	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	35.0	51.2
% time spent diving/snorkeling	34.7	22.9
% time spent cruising/sightseeing	30.0	15.9
% time spent sailing	0.0	0.0
% time spent whale & dolphin watching	0.0	0.0
% time spent doing other activities	0.3	10.0
Extended Trips		
% time spent fishing	0.0	51.2
% time spent diving/snorkeling	100.0	31.1
% time spent cruising/sightseeing	0.0	12.5
% time spent sailing	0.0	0.6
% time spent whale & dolphin watching	0.0	0.0
% time spent doing other activities	0.0	4.6

Table 12.5 Peak Charter Months During Past 12 Months

Months	Sample Count	Percent within TRC	Percent of QLD Fishery
January	1	6.7	21.8
February	1	6.7	6.2
March	3	20.0	8.8
April	5	33.3	16.6
May	5	33.3	17.6
June	6	40.0	26.9
July	7	46.7	37.3
August	8	53.3	37.3
September	7	46.7	44.0
October	9	60.0	48.7
November	6	40.0	35.2
December	3	20.0	25.9

Charter Industry Businesses

Table 12.6 identifies the number of employees within the Townsville TRC. The majority of businesses had one fulltime employee and an average of 0.8 fulltime equivalent employees. In summary it is estimated that there were 29 people employed in the charter industry within the Townsville TRC over the previous year.

Business Ownership and Size

Table 12.7 shows the number of years the current owner-operator had owned the charter business. Eighty percent of businesses had been owned for less than 10 years, and 13.3% had been owned for more than 15 years. The average was 6.5 years, some 6 months less than the Queensland average (7 years).

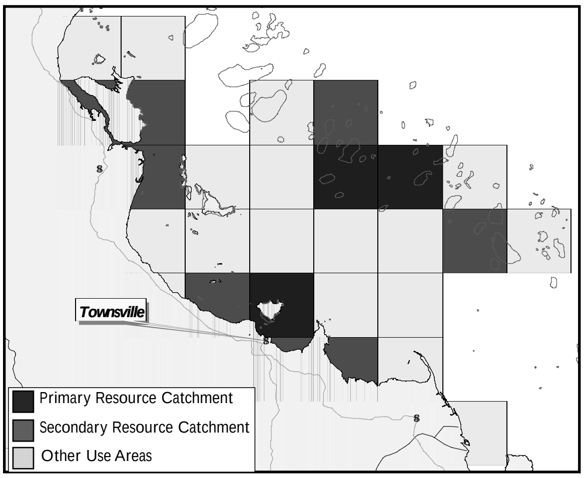

Figure 12.2 Townsville TRC: Location of Resource Use

Table 12.6 Number of Employees

Number of Charter Employees	Full-Time Count	Full-Time Percent	Part-Time Count	Part-Time Percent	Casual Count	Casual Percent
Nil	4	26.7	13	86.7	9	60.0
1	10	66.7	1	6.7	2	13.3
2-3	1	6.7	1	6.7	3	20.1
4-5	0	0.0	0	0.0	1	6.7
Total Businesses	15	100.0	15	100.0	15	100.0
Total Employees	12		3		14	
Mean Number of Employees per Business				1.4		
Mean Number of Full-time Employees per Business				0.8		
Mean Number of Part-time & Casual Employees per Business				1.1		
Estimated Number Employed within the TRC				29		

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

Table 12.7 Number of Years of Current Ownership of the Charter Business

Number of Years	Sample Count	Percent within TRC	Cumulative Percent
1-5	6	40.0	40.0
6-10	6	40.0	80.0
11-15	1	6.7	86.7
15+	2	13.3	100.0
Total	15	100.0	100.0
Mean Number of Years owned or operated			6.5
Difference of Mean to Population Mean (7.0)			-0.5

Note: Standard errors for number of years ownership (sample = 1.3; QLD population = 0.5).

Table 12.8 shows the average number of years the charter business had been operating in its current location. In the Townsville TRC, the average was 6.3 years, which was two years less than the Queensland average. These figures are less than the number of years the operator had owned the business, suggesting that the business had changed form or location in some way.

Table 12.8 Number of Years Business has been Operating

Number of Years	Sample Count	Percent within TRC	Cumulative Percent
1-5	7	46.9	46.9
6-10	5	33.5	80.0
11-15	3	20.1	100.0
15+	0	0.0	0.0
Total	6	100.0	100.0
Mean Number of Years owned or operated			6.3
Difference of TRC Mean to QLD Population Mean (8.3)			-2.0

Note: Standard errors for number of years operated (sample = 1.7; QLD population = 0.6)

Table 12.9 displays the number of boats operated by businesses in the Townsville TRC. The majority of charter businesses operated one boat (86.7%). The average number of boats owned (1.1 boats) was slightly less than the Queensland average (1.3 boats).

Table 12.9 Number of Boats Operated

Number of Boats	Sample Count	Percent TRC
1	13	86.7
2	2	13.3
3	0	0.0
4+	0	0.0
Total Number of Businesses	15	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 = 0.2; QLD population = 0.06)

Table 12.10 shows the frequency distribution of the length of boats within the Townsville TRC. Most boats were less than six metres in length, and 5.6% were between 18-24m. The average length was 8.6m, which is 2.8m less than the Queensland average.

Table 12.10 Length of Vessels Operated by Charter Businesses

Length of Boat (metres)	Sample Count	Percent TRC
2-6	9	50.0
7-10	3	16.7
11-14	5	27.8
15-18	0	0.0
18-24	1	5.6
24+	0	0.0
Total Number of Boats	18	100.0
Mean Length of Boats Operated (metres)		8.6
Difference of Mean to QLD Population Mean (11.4)		-2.8
Mean Length of Largest Boat Operated (metres)		9.3
Difference of Mean to QLD Population Mean (11.7)		-2.4

Note: Standard errors for mean length of boats (sample = 1.1; QLD population=0.4) and mean length of largest boats (sample =; QLD population=0.5).

Value of Production and Location of Sales

Table 12.11 shows the value of charter operations within the Townsville TRC for the twelve months prior to the survey. The profile for the Townsville TRC was different to the overall profile for Queensland. In the Townsville TRC there were a significantly higher percentage (80.0%) of businesses with production values less than $100,000. The estimated GVP for the TRC was $1.4 million, representing 4% of Queensland's charter industry.

Table 12.11 Business Income (Annual value)

Value ($,000)	Sample Count	Sample Percent	Queensland Percent
Less than $100	12	80.0	65.8
$101 - $200	2	13.3	11.5
$201 - $300	1	6.7	7.5
$301 - $400	0	0.0	4.0
$401 - $500	0	0.0	6.0
$501 - $600	0	0.0	2.0
$601 - $700	0	0.0	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	15	100.0	100.0
Mean GVP for TRC			$70,000
Estimated Total GVP for TRC			$1,389,000
Estimated Total GVP for QLD Population			$ 34,419,000
Percent of Total Queensland Production			4.0%

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

Table 12.12 estimates that the number of customers to charter trips from the Townsville TRC was 10,650, representing 3.1% of all charter custom in Queensland.

Table 12.12 Number of Customers per Year

	Mean Customers per Business	Sample Count	Estimated Total
Townsville TRC	532.5	6,923	10,650
QLD	1,335	259,930	343,100
Percent of Queensland	3.1%		

Note: Sample count=13. The estimated value is based on 20 estimated businesses (table 2.1)

Table 12.13 shows the value of sales and the origin of customers visiting the Townsville TRC for the sample of businesses, and estimated for the whole TRC. It is estimated that the value of charter trips was $1.4 million and that the majority of this income was generated through each of the local area (37.1%), other parts of Australia (26.6%), Queensland (17.0%) and the overseas market (19.3%).

Table 12.13 Origin and Value of Customers

	Sample Value of Sales	Mean Percent of Sample	Est.Value of all Sales
Local area	389,550	37.1	514,206
Queensland area	178,500	17.0	235,620
Australians	279,300	26.6	368,676
Overseas	202,650	19.3	267,498
Total Sales	$1,050,000	100.0	$1,386,000

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

Business Expenditure

Table 12.14 shows that approximately $722,000 was spent by businesses in the Townsville TRC on business goods and services (excluding salaries and wages) over the previous year. As expected the majority of this expenditure occurred in Townsville (84%) with the remaining amount being spent in several other towns in Queensland and NSW.

Table 12.14 Town Location of Business Expenditure (All costs, excluding salaries and wages)

Location of Expenditure	Sample Value of Expenditure	Percent of Sample	Est.Value Expenditure
Townsville	459,480	84.0	606,564
Cairns	39,384	7.2	51,991
Magnetic Island	33,914	6.2	44,770
Bamaga	3,282	0.6	4,333
Brisbane	3,282	0.6	4,333
Bundaberg	1,641	0.3	2,166
Cardwell	1,641	0.3	2,166
Ingham	3,282	0.6	4,333
NSW	1,641	0.3	2,166
Total Expenditure	$547,000	100.0	$722,100

Note: Business expenditure includes all non-labour expenditure (ie. 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 12.15 displays the towns in which charter operators resided within the Townsville TRC. Most operators resided within Townsville (73.3%).

Table 12.15 Town of Residence

Town of Residence	Sample Count	Percent of Sample
Townsville	11	73.3
Magnetic Island	2	13.3
Charters Towers	1	6.7
VIC	1	6.7
Total	15	100.0

Months Employed in the Charter Industry

Table 12.16 displays the months in which owner-operators were employed within the Townsville TRC. Most operators were employed for the whole of the year, and all operators were employed during March, and from May to September.

Table 12.16 Months Employed in the Charter Industry During Past 12 Months

Months	Owner Operators %	All QLD Operators
January	85.7	81.0
February	92.9	81.5
March	100.0	85.7
April	92.9	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	85.7	93.7
November	85.7	91.5
December	85.7	86.8

Location of Household Exenditure

Table 12.17 shows the location of expenditure on household items from the Townsville TRC. It is estimated than $317,000 was spent, and the majority occurred in Townsville (77.8%).

Table 12.17 Town Location of Household Expenditure (All commodities and services)

Location of Household Expenditure	Sample Value of Expenditure	Percent of Sample	Est. Value Expenditure
Townsville	186,953	77.8	246,782
Magnetic Island	18,743	7.8	24,742
VIC	16,100	6.7	21,252
Charters Towers	16,100	6.7	21,252
Brisbane	1,922	0.8	2,538
NSW	721	0.3	952
Total Expenditure	$240,300	100.0	$317,200

Note: The sample total personal income for the Townsville TRC was $395,000. 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 $240,300. 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 12.18. Most family members attended school or were employed in Townsville (65.9%) and Charters Towers (12.2%) as well as Victoria (12.2%).

Table 12.18 School and Employment Locations of Family Members

Location of Employment or School	Sample Count	Percent of Sample
Townsville	27	65.9
Charters Towers	5	12.2
Victoria	5	12.2
Magnetic Island	3	7.3
Brisbane	1	2.4
Total Family Members	77	100.0

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

Social and Demographic Profiles

Table 12.19 displays the profiles for charter operators from the Townsville TRC. Operators from this TRC tend to have lived in their town for longer, were less likely to rent, were less likely to have completed a business course or have a business plan, and had a higher elderly dependency than the average Queensland charter operator.

Table 12.19. Owner-Operator Profiles for the Townsville TRC

Profile	Owner-Operators	All QLD Charter operators
Estimated Number of Charter-owners	15	191
Mean age of fisher	43.3	45.4
Age range	29-67	20-76
Percent males	100.0	93.8
Mean years resident in town	24.1	19.1
Mean number of years in charter industry	10.5	11.0
Mean hours per week in charter industry	58.9	50.7
Percent moved town to retain employment	20.0	14.0
Percent currently employed in other industry	40.0	46.1
Percent previously employed in other industry	93.3	93.7
Housing tenure (%)		
Rent	6.7	14.1
Mortgage	40.0	33.0
Own home	53.3	50.8
Other (eg, live with parents, on boat)	0.0	2.0
Educational		
Year completed school (%)		
Primary school	13.3	3.2
Year 8	0.0	3.2
Year 9	0.0	4.7
Year 10	33.3	32.6
Year 11	6.7	10.5
Year 12	46.7	45.8
Percent completed trade or TAFE certificate	50.0	52.2
Percent completed industry or business course	33.3	55.6
Percent with business plan	46.7	53.4
Marital Status		
Percent married or relationship	86.7	88.1
Partner's Income*		
Full-time employment	53.8	52.2
Part-time employment	23.1	23.3
Casual employment	7.7	8.8
Not employed	15.4	15.7
Family Composition		
Mean family size	2.9	3.2
Estimated number of total family members	43	596
Dependency Ratios		
Age Dependency Ratio**	26.2	21.7
Elderly Dependency Ratio	7.1	1.2
Child Dependency Ratio	19.0	20.6
Family Member Industry Dependency Ratio***	15.0	20.4
Gross Individual Income (%)		
Less than $16,000	0.0	39.2
$16,000 - $26,000	50.0	22.2
$26,000 - $36,000	25.0	9.5
$36,000 - $52,000	0.0	13.3
$52,000 - $78,000	0.0	9.5
Over $78,000	25.0	6.3
Average Income ($)	39,250	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.

13 AIRLIE BEACH TRC

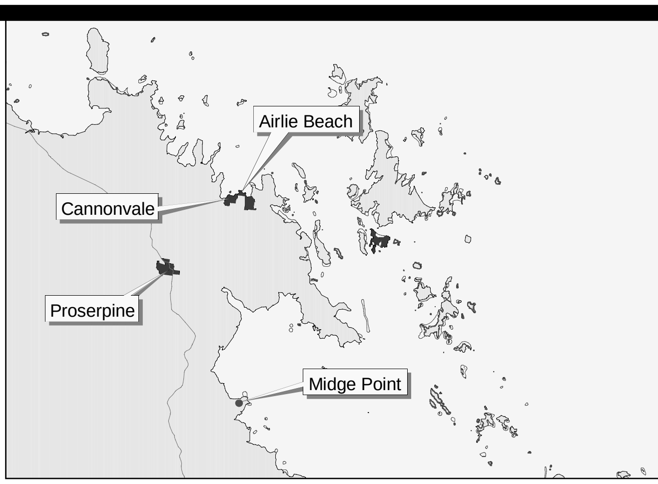

Figure 13.1 Location of the Airlie Beach TRC

The Airlie Beach TRC consists of the main urban centres of Airlie Beach, Cannonvale and Proserpine, and the Whitsunday Islands.

BUSINESS PROFILES

Location and Use of Ports

Table 13.1 shows the number of license holders within the Airlie Beach 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 8 commercial charter operators within this TRC and a 95% certainty that the correct population count of commercial charter operators within the TRC is between 3 and 13. Figure 13.1 shows the geographic location of the Airlie Beach TRC.

Table 13.1 Location of Homeports

Town	Adj. Database Count	Sample Count	Estimated Count	Percent within TRC
Airlie Beach	5	1	1	12.5
Hamilton Island	2	2	3	37.5
Hayman Island	1	1	1	12.5
Shute Harbour	0	2	3	37.5
Total TRC	8	6	8	100.0
95% Confidence Interval for Estimated TRC Count				3-13
Percent of Total Active License Holders in QLD				3.0%

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 13.2 shows the types of fishing trips that were chartered from the Airlie Beach TRC over the previous year. Reef fishing (58%), game fishing (24%) and estuarine fishing (16%) were the main activities on day trips. On overnight trips, reef fishing (50%) and game fishing (50%) were the main activities. Fishing-only trips were not chartered as extended trips.

Table 13.3 shows the number of trips and percentage of trips that were chartered especially for fishing. There were 1,015 day trips chartered from the Airlie Beach TRC, and 68.7% of these were predominately for fishing, which is a similar percentage to the Queensland average. There were only 12 days spent on overnight trips, and all were chartered for fishing. No extended trips were chartered from the Airlie Beach TRC. In summary, 69% of trips were fishing-only, similar to the Queensland aveage.

Table 13.4 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 fishing (60%) and cruising and sightseeing (35.5%) were the major activities. Overnight trips were not chartered unless for fishing, and there were no extended trips from this TRC.

Table 13.5 shows that the peak months for charter activity within the Airlie Beach TRC were June to November.

Table 13.5 Peak Charter Months During Past 12 Months

Months	Sample Count	Percent within TRC	Percent of QLD Fishery
January	1	16.7	21.8
February	0	0.0	6.2
March	0	0.0	8.8
April	1	16.7	16.6
May	0	0.0	17.6
June	2	33.3	26.9
July	3	50.0	37.3
August	2	33.3	37.3
September	3	50.0	44.0
October	3	50.0	48.7
November	2	33.3	35.2
December	1	16.7	25.9

Table 13.2 Type of Fishing Activity (during the last 12 months)

	Day trips		Overnight trips		Extended trips	
Fishing Type	Mean % Time within TRC	Mean % Time QLD	Mean % Time within TRC	Mean % Time QLD	Mean % Time within TRC	Mean % Time QLD
Reef (bottom fishing)	58.0	47.5	50.0	66.0	0.0	51.2
Game (pelagic)	24.0	18.8	50.0	20.3	0.0	31.1
Estuary	16.0	26.8	0.0	11.6	0.0	12.5
Crabbing	0.0	0.5	0.0	0.2	0.0	0.5
Other	2.0	6.4	0.0	2.0	0.0	4.6
Total Sample	100.0	100.0	100.0	100.0	100.0	100.0

Table 13.3 Number of Charter Trips (during the last 12 months)

Type	Mean within TRC	QLD Mean
Day Trips		
Mean number of day-trips (per business)	169.2	85.3
Mean number of fishing-only day-trips	116.2	59.9
Total number of day-trips	1,015	16,976
Total number of fishing-only day-trips	697	11,919
Percentage fishing-only trips	68.7%	70.2%
Overnight Trips		
Mean number of overnight trips (per business)	1.0	5.39
Mean number of fishing-only overnight-trips	1.0	3.34
Total number of days on overnight trips	12.0	1,072
Total number of fishing-only days on overnight trips	12.0	665
Percentage fishing-only trips	100.0%	62.0%
Extended Trips		
Mean number of extended-trips	0.0	6.9
Mean number of fishing-only extended-trips	0.0	4.49
Total number of days on extended trips	0.0	6,881
Total number of fishing-only days on extended trips	0.0	4,385
Percentage fishing-only trips	0.0%	66.1%
Mean number of days away (per business)	170.8	121.3
TOTAL days charter	1027	16,969
Percentage fishing only	69.0%	68.1%

Table 13.4 Charter Activities

Type	Within TRC	QLD Mean
Day Trips		
% time spent fishing	60.0	52.9
% time spent diving/snorkeling	4.5	13.1
% time spent cruising/sightseeing	35.5	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	0.0	51.2
% time spent diving/snorkeling	0.0	22.9
% time spent cruising/sightseeing	0.0	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	0.0	51.2
% time spent diving/snorkeling	0.0	31.1
% time spent cruising/sightseeing	0.0	12.5
% time spent sailing	0.0	0.6
% time spent whale & dolphin watching	0.0	0.0
% time spent doing other activities	0.0	4.6

Note: Sample size n=6. All columns are independent.

Charter Industry Businesses

Table 13.6 identifies the number of employees within the Airlie Beach TRC. The majority of businesses had 2-5 fulltime employees, and 16.7% of businesses had more than 5 employees. There was an average of 9.8 fulltime equivalent employees per business. In summary it is estimated that there were 71 people employed in the charter industry within the Airlie Beach TRC over the previous year.

Business Ownership and Size

Table 13.7 shows the number of years the current owner-operator had owned the charter business. Most businesses had been owned for less than 5 years (66.7%), and for an average of 4.3 years which is 2.7 years less than the Queensland average (7 years).

Location of Resource Use

Figure 13.2 shows the location of resource use by commercial charter operators in the Airlie Beach TRC. The location of resource use is primarily around the Whitsunday Islands, especially the northern islands.

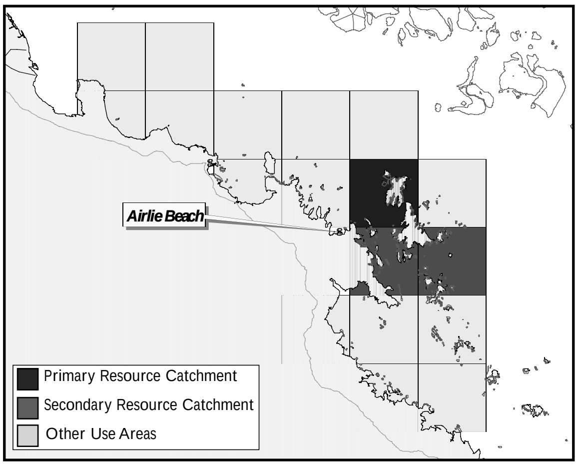

Figure 13.2 Airlie Beach TRC: Location of Resource Use

Table 13.6 Number of Employees

Number of Charter Employees	Full-Time Count	Full-Time Percent	Part-Time Count	Part-Time Percent	Casual Count	Casual Percent
Nil	0	0.0	5	83.3	2	33.3
1	1	16.7	0	0.0	1	16.7
2-3	2	33.3	1	16.7	2	33.3
4-5	2	33.3	0	0.0	1	16.7
5+	1	16.7	0	0.0	0	0.0
Total Businesses	6	100.0	6	0.0	6	100.0
Total Employees	59		2		10	
Mean Number of Employees per Business				10.8		
Mean Number of Full-time Employees per Business				9.8		
Mean Number of Part-time & Casual Employees per Business				2.0		
Estimated Number Employed within the TRC				71		

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

Table 13.7 Number of Years of Current Ownership of the Charter Business

Number of Years	Sample Count	Percent within TRC	Cumulative Percent
1-5	4	66.7	66.7
6-10	1	16.7	83.3
11-15	1	16.7	100.0
15+	0	0.0	0.0
Total	6	100.0	100.0
Mean Number of Years owned or operated			4.3
Difference of TRC Mean to QLD Population Mean (7.0)			-2.7

Note: Standard errors for number of years ownership (sample = 1.6; QLD population = 0.5).

Table 13.8 shows that the average number of years the charter business had been operating was 16.9 years. This is 8.6 years longer than the average Queensland charter business. Most businesses had been operating less than 5 years, and 16.7% of businesses had been operating for more than 15 years.

Table 13.8 Number of Years Business has been Operating

Number of Years	Sample Count	Percent within TRC	Cumulative Percent
1-5	3	50.0	50.0
6-10	0	0.0	50.0
11-15	2	33.3	83.3
15+	1	16.7	100.0
Total	6	100.0	100.0
Mean Number of Years owned or operated			16.9
Difference of Mean to Population Mean (8.3)			+8.6

Note: Standard errors for number of years operated (sample = 1.7; QLD population = 0.6)

Table 13.9 shows the number of boats owned by charter businesses in the Airlie Beach TRC. Fifty percent of businesses operated one boat, and 16.7% of businesses had more than 4 boats. The average for the TRC was 3 boats, which is significantly more than the Queensland average (1.3 boats).

Table 13.9 Number of Boats Operated by Charter Businesses

Number of Boats	Sample Count	Percent TRC
1	3	50.0
2	1	16.7
3	1	16.7
4+	1	16.7
Total Number of Businesses	6	100.0
Mean Number of Boats Operated		3.0
Difference of Mean to QLD Population Mean (1.3)		+1.7

Note: Standard errors for number of boats operated (sample = 1.4; QLD population = 0.06)

Table 13.10 shows the frequency distribution of the length of boats within the Airlie Beach TRC. Most vessels were between 7-10m (38.9%), and 33.4% of vessels were larger than 18m. The average length (15.6m), and the average length of the largest vessel (15.6m) were significantly longer than the Queensland averages (11.4 and 11.7m respectively).

Table 13.10 Length of Vessels Operated by Charter Businesses

Length of Boat (metres)	Sample Count	Percent TRC
2-6	2	11.1
7-10	7	38.9
11-14	2	11.1
15-18	1	5.6
18-24	2	11.1
24-30	1	5.6
30+	3	16.7
Total Number of Boats	18	100.0
Mean Length of Boats Operated (metres)		15.6
Difference of Mean to QLD Population Mean (11.4)		+4.2
Mean Length of Largest Boat Operated (metres)		15.6
Difference of Mean to QLD Population Mean (11.7)		+3.9

Note: Standard errors for mean length of boats (sample = 2.6; QLD population=0.4) and mean length of largest boats (sample = 1.4; QLD population=0.5).

Value of Operation and Location of Sales

Table 13.11 shows the value of charter operations within the Airlie Beach TRC for the twelve months prior to the survey. The mean GVP for the TRC was $233,000, and the profile shows that only 33.3% of businesses earned less than $100,000, as compared to 65.8% in the Queensland profile. Some 16.7% of businesses earned between $600-700,000. The estimated total GVP for the TRC was $1.8m, representing 5.4% of the Queensland charter income.

Table 13.11 Business Income (Annual value)

Value ($,000)	Sample Count	Sample Percent	Queensland Percent
Less than $100	2	33.3	65.8
$101 - $200	0	0.0	11.5
$201 - $300	2	33.3	7.5
$301 - $400	1	16.7	4.0
$401 - $500	0	0.0	6.0
$501 - $600	0	0.0	2.0
$601 - $700	1	16.7	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	6	100.0	100.0
Mean GVP for TRC			$233,000
Estimated Total GVP for TRC			$1,848,000
Estimated Total GVP for QLD			$34,419,000
Percent of Total Queensland Production			5.4%

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

Table 13.12. provides an approximation of the number of people chartering trips from the Airlie Beach TRC for the previous year. It is estimated that there were 8,360 customers for the TRC, representing 2.4% of the Queensland total.

Table 13.12 Number of Customers per Year

	Mean Customers per Business	Sample Count	Estimated Total
Airlie Beach TRC	1,045	4,180	8,360
QLD	1,335	259,930	343,100
Percent of Queensland	2.4%		

Table 13.13 shows the origin and associated value of customers to the Airlie Beach TRC. It is estimated that $1.8m was spent on charters over the previous 12 months, and that the majority of this income was derived from Queensland (26%), Australia (32%), and the overseas market (27%).

Table 13.13 Origin and Value of Customers

Origin	Sample Value of Sales	Mean % of Sample	Est.Value of all Sales
Local area	210,000	15.0	277,200
Queensland	364,000	26.0	480,480
Outside Queensland	448,000	32.0	591,360
Overseas	378,000	27.0	498,960
Total Sales	$1,400,000	100.0	$1,848,000

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

Business Expenditure

Table 13.14 shows that approximately $1 million was spent by businesses in the Airlie Beach TRC on business goods and services (excluding salaries and wages) over the previous year. The majority of this expenditure occurred in Airlie Beach (49.8% or $0.5 million), Hamilton Island (22.5% or $216,000) and Mackay (8.5% or $82,000). The remaining 19.2% was dispersed to several other Australian and overseas locations.

Table 13.14 Town Location of Business Expenditure (All costs, excluding salaries and wages)

Location of Expenditure	Sample Value of Expenditure	Percent of Sample	Est.Value Expenditure
Airlie Beach	363,241	49.8	479,474
Hamilton Island	164,115	22.5	216,600
Mackay	61,999	8.5	81,838
Proserpine	34,282	4.7	45,251
Cannonvale	32,094	4.4	42,363
NSW	23,341	3.2	30,809
Shute Harbour	22,611	3.1	29,846
Brisbane	10,941	1.5	14,442
Bowen	5,835	0.8	7,702
Overseas	5,835	0.8	7,702
Gold Coast	4,376	0.6	5,776
Total Expenditure	$729,400	100.0	$962,800

Note: Business expenditure includes all non-labour expenditure (ie. 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 13.15 shows the towns of residence for charter operators within the Airlie Beach TRC. Charter-operators lived in Airlie Beach (40%), Hamilton Island (40%), and Cannonvale (20%).

Table 13.15 Town of Residence

Town of Residence	Sample Count	Percent of Sample
Airlie Beach	2	40.0
Hamilton Island	2	40.0
Cannon Vale	1	20.0
Total	5	100.0

Months Employed in the Charter Industry

Table 13.16 displays the months that the majority of owner-operators within the TRC were employed in the charter industry. All operators were employed throughout each month of the year, which is unusual compared to the Queensland average.

Table 13.16 Months Employed in the Charter Industry During Past 12 Months

Months	Owner Operators %	All QLD Operators
January	100.0	81.0
February	100.0	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 13.17 shows the location of towns in which household items were purchased for families of charter operators in the Airlie Beach TRC. It is estimated that $146,100 was spent on household items, and that this was spent mostly in Airlie Beach (48.1%), Hamilton Island (26.1%) and Cairns (15.8%). Several other towns in Queensland and Australia were also visited to purchase household items.

Table 13.17 Town Location of Household Expenditure (all commodities and services)

Location of Household Expenditure	Sample Value of Expenditure	Percent of Sample	Est. Value Expenditure
Airlie Beach	53,247	48.1	70,274
Hamilton Island	28,893	26.1	38,132
Cairns	17,491	15.8	23,084
Mackay	4,317	3.9	5,698
Proserpine	2,103	1.9	2,776
Gold Coast	1,771	1.6	2,338
NSW	996	0.9	1,315
Brisbane	886	0.8	1,169
Total Expenditure	$110,700	100.0	$146,100

Note: The sample total personal income for the Airlie Beach TRC was $182,000. 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 $110,700. 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 13.18. Most family members attended school or were employed in Cannonvale (37.5%) and Hamilton Island (37.5%).

Table 13.18 School and Employment Locations of Family Members

Location of Employment or School	Sample Count	Percent of Sample
Cannonvale	6	37.5
Hamilton Island	6	37.5
Airlie Beach	4	25.0
Total Family Members	16	100.0

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

Social and Demographic Profiles

Table 13.19 provides profile information for charter owner-operators from the Airlie Beach TRC. These operators tended to be newer to the region and the industry, more likely to rent, more likely to have left school early and completed a TAFE certificate or trade, and more likely to have done a business course and have a business plan. All were married, and more spouses were likely to be working in the same business, have dependent children, and earn more than the average Queensland charter-operator.

Table 13.19. Owner-Operator Profiles for the Airlie Beach TRC

Profile	Owner-Operators	All QLD Operators
Estimated Number of Charter-owners	5	191
Mean age of operator	42.3	45.4
Age range	35-55	20-76
Percent males	93.8	
Mean years resident in town	8.9	19.1
Mean number of years in charter industry	8.1	11.0
Mean hours per week in charter industry	61.8	50.7
Percent moved town to retain employment	20.0	14.0
Percent currently employed in other industry	40.0	46.1
Percent previously employed in other industry	80.0	93.7
Housing tenure (%)		
Rent	40.0	14.1
Mortgage	20.0	33.0
Own home	40.0	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	0.0	3.2
Year 9	0.0	4.7
Year 10	60.0	32.6
Year 11	0.0	10.5
Year 12	40.0	45.8
Percent completed trade or TAFE certificate	80.0	52.2
Percent completed industry or business course	80.0	55.6
Percent with business plan	80.0	53.4
Marital Status		
Percent married or relationship	100.0	88.1
Partner's Income*		
Full-time employment	100.0	52.2
Part-time employment	0.0	23.3
Casual employment	0.0	8.8
Not employed	0.0	15.7
Family Composition		
Mean family size	2.8	3.2
Estimated number of total family members	14	596
Dependency Ratios		
Age Dependency Ratio**	28.6	21.7
Elderly Dependency Ratio	0.0	1.2
Child Dependency Ratio	28.6	20.6
Family Member Industry Dependency Ratio***	33.3	20.4
Gross Individual Income (%)		
Less than $16,000	16.7	39.2
$16,000 - $26,000	33.3	22.2
$26,000 - $36,000	0.0	9.5
$36,000 - $52,000	33.3	13.3
$52,000 - $78,000	16.7	9.5
Over $78,000	0.0	6.3
Average Income ($)	33,833	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*

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.

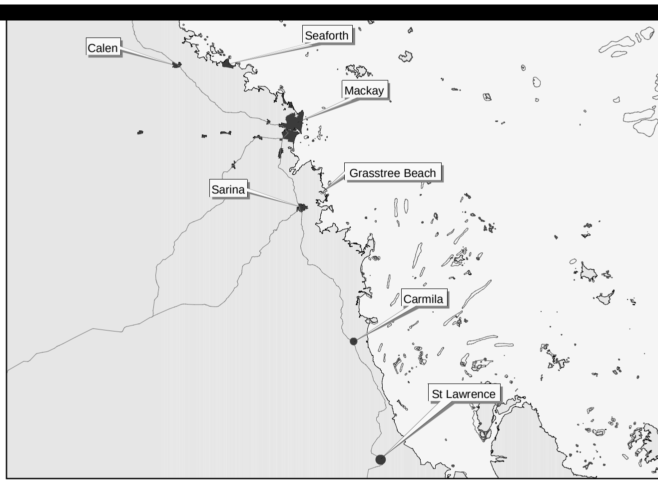

Figure 14.1 Location of the Mackay TRC

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 14.3 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 14.2 Type of Fishing Activity (during the last 12 months)

	Day trips		Overnight trips		Extended trips	
Fishing Type	Mean % Time within TRC	Mean % Time QLD	Mean % Time within TRC	Mean % Time QLD	Mean % Time within TRC	Mean % 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

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.

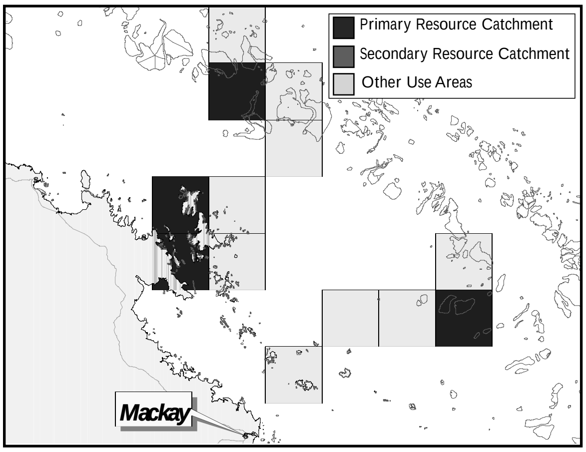

Figure 14.2 Mackay TRC: Location of Resource Use

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 (ie. 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 Incomed*		
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.*

15 GLADSTONE TRC

The Gladstone TRC consists of the main urban centre of Gladstone and smaller towns to the north including Port Alma, and towns to the south including Turkey beach.

BUSINESS PROFILES

Location and Use of Ports

Table 15.1 shows the number of license holders within the Gladstone 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 28 commercial charter operators within this TRC and a 95% certainty that the correct population count of commercial charter operators within the TRC is between 18 and 38. Figure 1 shows the geographic location of the Gladstone TRC.

Table 15.1 Location of Homeports

Town	Adj. Database Count	Sample Count	Estimated Count	Percent within TRC
Gladstone	17	19	25	89.3
Town of 1770	2	2	3	10.7
Boyne Island	1	0	0	0.0
Calliope	1	0	0	0.0
Total TRC	21	21	28	100.0
95% Confidence Interval for Estimated TRC Count				18-38
Percent of Total Active License Holders in QLD				10.6%

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 15.2 shows the types of fishing charters from the Gladstone TRC over the previous year. Reef fishing was the sole fishing activity on day trips and overnight trips. On extended trips, reef fishing represented 91.4% and game fishing was also undertaken (8.3%).

Table 15.3 displays the number and type of charters from the Gladstone TRC over the previous year. Most trips from the Gladstone TRC were extended trips (1,775 days), and 85.5% were fishing charters. This is high proportion relative to the Queensland average (66.1%). There were 776 day trips and only a relatively small percentage were fishing charters (17.1%). There were 442 days of overnight trips, and 81.9% were fishing charters, which was higher than the Queensland average for overnight trips. Overall, 67.3% of charters from the Gladstone TRC were fishing charters, which is similar to the Queensland average.

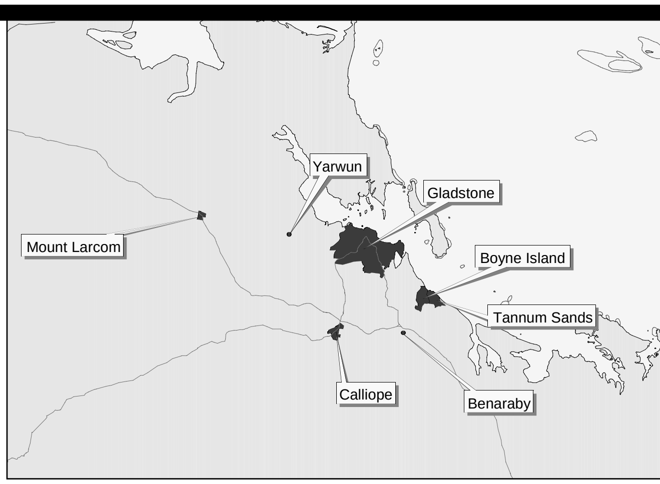

Figure 20.1 Location of the Gladstone TRC

Table 15.4 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 most time was spent doing unspecified activities (such as transportation) (45%), and only 14.8% of time was spent fishing. This is relatively low compared to the Queensland average (52.9%). On overnight trips, 23.3% of time was spent fishing, and on extended trips, 59.2% of time was spent fishing.

Table 15.5 shows that the peak months for charter activity within the Gladstone TRC were August to November.

Table 15.5 Peak Charter Months During Past 12 Months

Months	Sample Count	Percent within TRC	Percent of QLD Fishery
January	2	9.5	21.8
February	0	0.0	6.2
March	2	9.5	8.8
April	5	23.8	16.6
May	6	28.6	17.6
June	6	28.6	26.9
July	6	28.6	37.3
August	7	33.3	37.3
September	14	66.7	44.0
October	14	66.7	48.7
November	11	52.4	35.2
December	5	23.8	25.9

Table 15.2 Type of Fishing Activity (during the last 12 months)

	Day trips		Overnight trips		Extended trips	
Fishing Type	Mean % Time within TRC	Mean % Time QLD	Mean % Time within TRC	Mean % Time QLD	Mean % Time within TRC	Mean % Time QLD
Reef (bottom fishing)	100.0	47.5	100.0	66.0	91.4	51.2
Game (pelagic)	0.0	18.8	0.0	20.3	8.3	31.1
Estuary	0.0	26.8	0.0	11.6	0.0	12.5
Crabbing	0.0	0.5	0.0	0.2	0.0	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

Table 15.3 Number of Charter Trips (during the last 12 months)

Type	Mean within TRC	QLD Mean
Day Trips		
Mean number of day-trips (per business)	36.9	85.3
Mean number of fishing-only day-trips	6.3	59.9
Total number of day-trips	776	16,976
Total number of fishing-only day-trips	133	11,919
Percentage fishing-only	17.1%	70.2%
Overnight Trips		
Mean number of overnight trips (per business)	10.5	5.39
Mean number of fishing-only overnight-trips	8.6	3.34
Total number of days on overnight trips	442	1,072
Total number of fishing-only days on overnight trips	362	665
Percentage fishing-only	81.9%	62.0%
Extended Trips		
Mean number of extended-trips	15.9	6.9
Mean number of fishing-only extended-trips	13.6	4.49
Total number of days on extended trips	1,775	6,881
Total number of fishing-only days on extended trips	1,519	4,385
Percentage fishing-only	85.5%	66.1%
Mean number of days away (per business)	137	121.3
TOTAL days charter	2,993	16,969
Percentage fishing only	67.3%	68.1%

Table 15.4 Other Activities on Charters (during the last 12 months)

Type	Within TRC	QLD
Day Trips		
% time spent fishing		52.9
% time spent diving/snorkeling	14.5	13.1
% time spent cruising/sightseeing	9.0	17.5
% time spent sailing	0.0	0.4
% time spent whale & dolphin watching	16.7	4.2
% time spent doing other activities	45.0	11.9
Overnight Trips		
% time spent fishing	23.3	51.2
% time spent diving/snorkeling	11.7	22.9
% time spent cruising/sightseeing	0.0	15.9
% time spent sailing	0.0	0.0
% time spent whale & dolphin watching	0.0	0.0
% time spent doing other activities	65.0	10.0
Extended Trips		
% time spent fishing	59.2	51.2
% time spent diving/snorkeling	28.1	31.1
% time spent cruising/sightseeing	3.5	12.5
% time spent sailing	1.9	0.6
% time spent whale & dolphin watching	0.0	0.0
% time spent doing other activities	7.3	4.6

Location of Resource Use

Figure 15.2 shows the location of resource use by commercial charter operators in the Gladstone TRC. The location of resource use was the Swains Reefs, as well as the Capricorn-Bunker group of reefs.

Charter Industry Businesses

Table 15.6 identifies the number of employees within the Gladstone TRC. The majority of businesses had between 1-5 fulltime and casual employees, and a mean of 3 employees per business. It is estimated that there were 85 people employed in the charter industry in the Gladstone TRC over the previous year.

Business Ownership and Size

Table 15.7 shows the number of years the current owner or operator had owned the charter business. Some 66.6% of businesses had been owned for longer than 5 years, and the mean of 12.6 years was 5.6 years longer than the Queensland average (7 years).

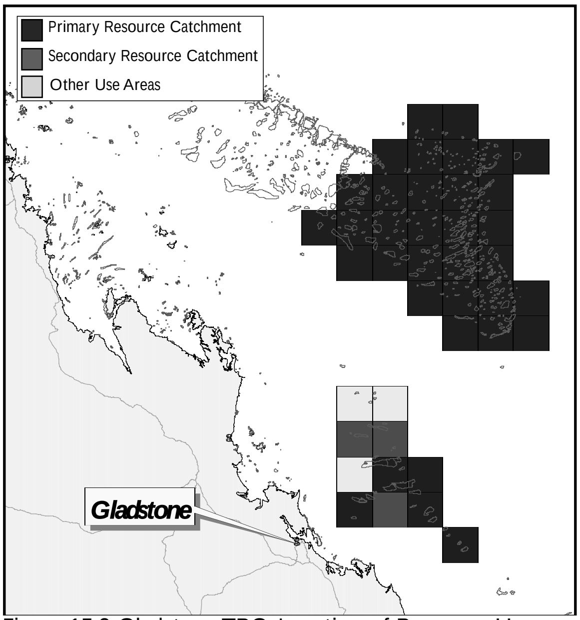

Figure 15.2 Gladstone TRC. Location of Resource Use

Table 15.6 Number of Employees

Number of Charter Employees	Full-Time Count	Full-Time Percent	Part-Time Count	Part-Time Percent	Casual Count	Casual Percent
Nil	2	9.5	15	71.4	9	42.9
1	11	52.4	2	9.5	4	19.0
2-3	4	19.0	2	9.5	4	19.0
4-5	3	28.5	2	9.5	3	14.3
5+	2	9.5	0	0.0	1	4.8
Total Businesses	21	100.0	21	100.0	21	100.0
Total Employees	39		15		31	
Mean Number of Employees per Business				3.0		
Mean Number of Full-time Employees per Business				1.9		
Mean Number of Part-time & Casual Employees per Business				2.2		
Estimated Number Employed within the TRC				85		

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

Table 15.7 Number of Years of Current Ownership of the Charter Business

Number of Years	Sample Count	Percent within TRC	Cumulative Percent
1-5	7	33.3	33.3
6-10	4	19.1	52.4
11-15	5	24.0	76.2
15+	5	24.0	100.0
Total	21	100.0	100.0
Mean Number of Years owned or operated			12.6
Difference of TRC Mean to QLD Population Mean (7.0)			+5.6

Note: Standard errors for number of years ownership (sample = 2.4; QLD population = 0.5).

Table 15.8 shows the average number of years the charter business had been operating. Most businesses had been operating for more than 10 years (61.9%). The mean number of years was 16.6, which was over eight years longer than the average Queensland charter business.

Table 15.8 Number of Years Business has been Operating

Number of Years	Sample Count	Percent within TRC	Cumulative Percent
1-5	4	19.0	19.0
6-10	4	19.0	38.1
11-15	6	28.6	66.7
15+	7	33.3	100.0
Total	21	100.0	100.0
Mean Number of Years owned or operated			16.6
Difference of Mean to Population Mean (8.3)			+8.3

Note: Standard errors for number of years operated (sample = 2.6; QLD population = 0.6)

Table 15.9 shows the number of boats owned by charter businesses in the Gladstone TRC. Most businesses owned one boat (76.2%), although 19% owned 2 boats. The average for the TRC was 1.3, which reflects the Queensland average (1.3 boats per business).

Table 15.9 Number of Boats Operated by Charter Businesses

Number of Boats	Sample Count	Percent TRC
1	16	76.2
2	4	19.0
3	1	4.8
4+	0	0.0
Total Number of Businesses	21	100.0
Mean Number of Boats Operated		1.3
Difference of Mean to QLD Population Mean (1.3)		0.0

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

Table 15.10 shows the frequency distribution of the length of boats within the Gladstone TRC. No vessel was shorter than 6m, and most vessels were bewteen 11-24m. Nearly four percent of boats were over 30m in length. The average length for the TRC was 17.8, and the average length of the largest vessel in the TRC was 17.8. These lengths were considerably longer than the average Queensland charter vessel (11.4 and 11.7m respectively).

Table 15.10 Length of Vessels Operated by Charter Businesses

Length of Boat (metres)	Sample Count	Percent TRC
2-6	0	0.0
7-10	2	7.7
11-14	6	23.1
15-18	6	23.1
18-24	9	34.6
24-30	2	7.7
30+	1	3.8
Total Number of Boats	26	100.0
Mean Length of Boats Operated (metres)		17.8
Difference of Mean to QLD Population Mean (11.4)		+6.4
Mean Length of Largest Boat Operated (metres)		17.8
Difference of Mean to QLD Population Mean (11.7)		+6.1

Note: Standard errors for mean length of boats (sample = 1.2; QLD population=0.4) and mean length of largest boats (sample = 1.4; QLD population=0.5).

Value of Production and Location of Sales

Table 15.11 shows the value of charter operations within the Gladstone TRC for the twelve months prior to the survey. The profile shows that 42.9% of businesses earned less than $100,000, and that 42.8% earned more than $400,000. The mean for the TRC was $233,000, and the estimated GVP for the TRC was $6.5 million representing 18.8% of the Queensland charter value.

Table 15.11 Business Income (Annual value)

Value ($,000)	Sample Count	Sample Percent	Queensland Percent
Less than $100	9	42.9	65.8
$101 - $200	3	14.3	11.5
$201 - $300	0	0.0	7.5
$301 - $400	2	9.5	4.0
$401 - $500	3	14.3	6.0
$501 - $600	2	9.5	2.0
$601 - $700	2	9.5	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	21	100.0	100.0
MeanGVP for TRC			$233,000
Estimated Total GVP for TRC			$6,468,000
Estimated Total GVP for QLD Population			$ 34,419,000
Percent of Total Queensland Production			18.8%

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

Table 15.12 shows the number of customers over the previous year for the Gladstone TRC. It is estimated that there were 86,200 customers, making up 25.1% of all customers in the Queensland industry.

Table 15.12 Number of Customers per Year

Count	Mean Customers per Business	Sample Count	Estimated Total
Gladstone TRC	3,079	55,436	86,233
QLD	1,335	259,930	343,100
Percent of Queensland	25.1%		

Table 15.13 shows the value and the origin of customers visiting the Gladstone TRC. It is estimated that the value of all sales was $6.5 million, and the majority was gained through customers from Queensland (41.5%) and other parts of Australia (32.3%), as well as the local area (22.2%). The overseas market was comparatively small (4.1%) in the Gladstone TRC.

Table 15.13 Origin and Value of Customers

	Sample Value of Sales	Mean Percent of Sample	Estimated of all Sales
Local area	1,087,800	22.2	1,435,896
Queensland	2,033,500	41.5	2,684,220
Outside Queensland	1,582,700	32.3	2,089,164
Overseas	200,900	4.1	265,188
Total Sales	$4,900,000	100.0	$6,468,000

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

Business Expenditure

Table 15.14 shows the distribution of business expenditure from the Gladstone TRC. It is estimated that $3.4 million was spent on business goods and services (excluding salaries and wages). The majority of this expenditure occurred in Gladstone (80.6%), as well as several other locations in Queensland and Australia.

Table 15.14 Town Location of Business Expenditure
(All costs, excluding salaries and wages)

Location of Expenditure	Sample Value of Expenditure	Percent of Sample	Estimated Expenditure
Gladstone	2,057,637	80.6	2,716,059
Bundaberg	178,703	7.0	235,886
Brisbane	155,727	6.1	205,558
Scarborough	40,846	1.6	53,917
Agnes Water	33,188	1.3	43,807
Hervey Bay	17,870	0.7	23,589
NSW	17,870	0.7	23,589
Newport	12,765	0.5	16,849
Caboolture	5,106	0.2	6,740
Gold Coast	5,106	0.2	6,740
Mackay	5,106	0.2	6,740
Miriam Vale	5,106	0.2	6,740
Red Hill	5,106	0.2	6,740
Rockhampton	5,106	0.2	6,740
Toowoomba	5,106	0.2	6,740
Yeppoon	5,106	0.2	6,740
Total Expenditure	$2,552,900	100.0	$3,369,800

Note: Business expenditure includes all non-labour expenditure (ie. 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 15.15 shows the towns of residence for charter operators from the Gladstone TRC. Most charter operators lived in Gladstone (80.9%), and other surrounding areas.

Table 15.15 Town of Residence

Town of Residence	Sample Count	Percent of Sample
Gladstone	17	80.9
Calliope	1	4.8
Boyne Island	1	4.8
Lawnton	1	4.8
Town of 1770	1	4.8
Total	21	100.0

Months Employed in the Charter Industry

Table 15.16 displays the months in which charter operators were employed in the charter industry over the previous year. Most operators were employed between April and November, and fewer than the Queensland average were employed between January and March.

Table 15.16 Months Employed in the Charter Industry During Past 12 Months

Months	Owners Operators %	All QLD Operators
January	71.4	81.0
February	71.4	81.5
March	76.2	85.7
April	95.2	89.4
May	95.2	92.6
June	90.5	92.6
July	90.5	92.6
August	95.2	93.7
September	95.2	95.2
October	90.2	93.7
November	90.2	91.5
December	81.0	86.8

Location of Household Expenditure

Table 15.17 shows the location of household expenditure by charter operators and their families. It is estimated that $814,000 was spent on household commodities and services, and that the majority was spent in Gladstone (81%). Several other towns in Queensland were recipients of the household expenditure from this TRC.

Table 15.17 Town Location of Household Expenditure (all commodities and services)

Location of Expenditure	Sample Value of of Sample	Percent Expenditure	Estimated Expenditure
Gladstone	499,608	81.0	659,340
Agnes Water	19,738	3.20	26,048
Rockhampton	15,420	2.50	20,350
Seventeen Seventy	13,570	2.20	17,908
Strathpine	14,186	2.30	18,722
Brisbane	14,186	2.30	18,722
Bundaberg	16,654	2.70	21,978
Lawnton	8,635	1.40	11,396
Aspley	3,084	0.50	4,070
Mt Larcom	3,084	0.50	4,070
Mackay	2,467	0.40	3,256
Monto	2,467	0.40	3,256
Calliope	1,234	0.20	1,628
Gold Coast	1,234	0.20	1,628
Isisford	1,234	0.20	1,628
Total Expenditure	$616,800	100.0	$814,000

Note: The sample total personal income for the Gladstone TRC was $801,000. 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 $616,800. Estimated value of expenditure was calculated by multiplying the sample value of expenditure by 1.32

Source: CRC Reef (2000).

School and Employment Locations of Family Members

The town locations in which family members attended school or were employed are shown in Table 15.18. Gladstone (74.1%) was the main town for school and employment of family members.

Table 15.18 School and Employment Locations of Family Members

Location of Employment or School	Sample Count	Percent of Sample
Gladstone	40	74.1
Seventeen Seventy	3	5.6
Agnes Water	2	3.7
Brisbane	2	3.7
Caloundra	1	1.9
Hervey Bay	1	1.9
Karumba	1	1.9
Rockhampton	1	1.9
Tannum sands	1	1.9
NSW	1	1.9
Overseas	1	1.9
Total Family Members	54	100.0

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

Social and Demographic Profiles

Table 15.19 shows that owner-operators in the Gladstone TRC had been in the industry and resident town for longer, were less likely to rent and more likely to own their own home, more likely to have finished year 12, less likely to have a business plan, had fewer dependents, had more family members involved in the business, and took less money home than the average Queensland charter operator.

Table 15.19 Owner-Operator Profiles for the Gladstone TRC

Profile	Owner-Operators	All QLD Charter operators
Estimated Number of Charter-owners	21	191
Mean age of operators	46.4	45.4
Age range	22-63	20-76
Percent males	85.7	93.8
Mean years resident in town	23.9	19.1
Mean number of years in charter industry	15.4	11.0
Mean hours per week in charter industry	55.4	50.7
Percent moved town to retain employment	4.8	14.0
Percent currently employed in other industry	42.9	46.1
Percent previously employed in other industry	85.0	93.7
Housing tenure (%)		
Rent	4.8	14.1
Mortgage	23.8	33.0
Own home	71.4	50.8
Other (eg, live with parents, on boat)	0.0	2.0
Educational		
Year completed school (%)		
Primary school	5.0	3.2
Year 8	5.0	3.2
Year 9	5.0	4.7
Year 10	20.0	32.6
Year 11	10.0	10.5
Year 12	55.0	45.8
Percent completed trade or TAFE certificate	47.4	52.2
Percent completed industry or business course	47.4	55.6
Percent with business plan	38.1	53.4
Marital Status		
Percent married or relationship	81.0	88.1
Partner's Incomed*		
Full-time employment	50.0	52.2
Part-time employment	25.0	23.3
Casual employment	12.5	8.8
Not employed	12.5	15.7
Family Composition		
Mean family size	2.9	3.2
Estimated number of total family members	60	596
Dependency Ratios		
Age Dependency Ratio**	11.5	21.7
Elderly Dependency Ratio	1.6	1.2
Child Dependency Ratio	9.8	20.6
Family Member Industry Dependency Ratio***	23.1	20.4
Gross Individual Income (%)		
Less than $16,000	63.6	39.2
$16,000 - $26,000	0.0	22.2
$26,000 - $36,000	18.2	9.5
$36,000 - $52,000	9.1	13.3
$52,000 - $78,000	9.1	9.5
Over $78,000	0.0	6.3
Average Income ($)	20,600	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.*

16 HERVEY BAY TRC

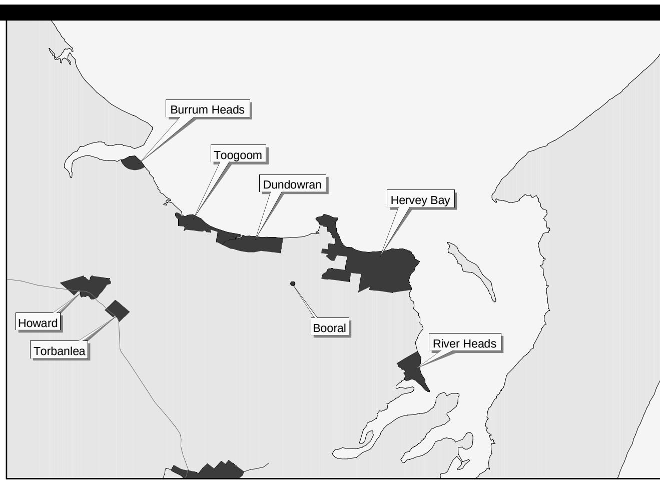

Figure 16.1 Location of the Hervey Bay TRC

The Hervey Bay TRC consists of the main urban centre of Hervey Bay.

BUSINESS PROFILES

Location and Use of Ports

Table 16.1 shows the number of license holders within the Hervey Bay 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 17 commercial charter operators within this TRC and a 95% certainty that the correct population count of commercial charter operators within the TRC is between 9 and 25. Figure 1 shows the geographic location of the Hervey Bay TRC.

Table 16.1 Location of Homeports

Town	Adj. Database Count	Sample Count	Estimated Count	Percent within TRC
Hervey Bay	6	13	17	100.0
Pialba	3	0	0	0.0
Torquay	3	0	0	0.0
Urangan	5	0	0	0.0
Total TRC	17	13	17	100.0
95% Confidence Interval for Estimated TRC Count				9-25
Percent of Total Active License Holders in QLD				6.5%

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 16.2 shows the types of fishing that were chartered from the Hervey Bay TRC. The main fishing activities on day trips were reef fishing (76%) and game fishing (15%). On overnight trips, the main fishing activity was reef fishing (92%), and similarly on extended trips (68.8%).

Table 16.3 shows the number of trips and the percentage that were chartered primarily for fishing. Day trips were the most common trips chartered from the Hervey Bay TRC (1,304 days), and 79.9% were predominately fishing charters. Most overnight trips (292 days) were chartered for fishing (96.6%), which is significantly higher than the Queensland average for overnight trips. Similarly, a high proportion of extended trips (502 days) were also fishing-only (84.7%). In summary, 83.4% of charters from the Hervey Bay TRC were fishing charters, and compared to the Queensland average (66.1%), this makes the TRC a popular fishing-charter TRC.

Table 16.4 shows the percentage of time spent fishing and doing other activities such as diving and cruising, on trips where fishing was not the only activity. On day trips, fishing represented 41.3% of activities, and other activities (35.9%) and whale and dolphin watching (22.9%) were also major activities. On overnight trips that were not predominately for fishing, fishing represented 94.5% of activities, and similarly on extended trips, fishing made-up 90% of activities.

Table 16.5 shows that the peak months for charter activity within the Hervey Bay TRC were August to January, which was similar to the average Queensland peak season (July to December).

Table 16.5 Peak Charter Months During Past 12 Months

Months	Sample Count	Percent within TRC	Percent of QLD Fishery
January	4	30.8	21.8
February	2	15.4	6.2
March	0	0.0	8.8
April	3	23.1	16.6
May	4	30.8	17.6
June	3	23.1	26.9
July	3	23.1	37.3
August	4	30.8	37.3
September	4	30.8	44.0
October	4	30.8	48.7
November	3	23.1	35.2
December	5	38.5	25.9

Table 16.2 Type of Fishing Activity (during the last 12 months)

	Day trips		Overnight trips		Extended trips	
Fishing Type	Mean % Time within TRC	Mean % Time QLD	Mean % Time within TRC	Mean % Time QLD	Mean % Time within TRC	Mean %Time QLD
Reef (bottom fishing)	76.0	47.5	92.0	66.0	68.8	51.2
Game (pelagic)	15.0	18.8	0.0	20.3	6.2	31.1
Estuary	5.0	26.8	0.0	11.6	0.0	12.5
Crabbing	0.0	0.5	0.0	0.2	0.0	0.5
Other	4.0	6.4	8.0	2.0	25.0	4.6
Total Sample	100.0	100.0	100.0	100.0	100.0	100.0

Table 16.3 Number of Charter Trips (during the last 12 months)

Type	Mean within TRC	QLD Mean
Day Trips		
Mean number of day-trips (per business)	100.3	85.3
Mean number of fishing-only day-trips	80.1	59.9
Total number of day-trips	1,304	16,976
Total number of fishing-only day-trips	1,042	11,919
Percentage fishing only	79.9%	70.2%
Overnight Trips		
Mean number of overnight trips (per business)	11.2	5.39
Mean number of fishing-only overnight-trips	10.8	3.34
Total number of days on overnight trips	292	1,072
Total number of fishing-only days on overnight trips	282	665
Percentage fishing only	96.6%	62.0%
Extended Trips		
Mean number of extended-trips	10.0	6.9
Mean number of fishing-only extended-trips	8.5	4.49
Total number of days on extended trips	502	6,881
Total number of fishing-only days on extended trips	425	4,385
Percentage fishing only	84.7%	66.1%
Mean number of days away (per business)	131.5	121.3
TOTAL days charter	2098	16,969
Percentage fishing only	83.4%	68.1%

Table 16.4 Other Activities on Charters (during the last 12 months)

Type	Within TRC	QLD Mean
Day Trips		
% time spent fishing	41.3	52.9
% time spent diving/snorkeling	0.0	13.1
% time spent cruising/sightseeing	0.0	17.5
% time spent sailing	0.0	0.4
% time spent whale & dolphin watching	22.9	4.2
% time spent doing other activities	35.9	11.9
Overnight Trips		
% time spent fishing	94.5	51.2
% time spent diving/snorkeling	0.0	22.9
% time spent cruising/sightseeing	5.0	15.9
% time spent sailing	0.0	0.0
% time spent whale & dolphin watching	0.0	0.0
% time spent doing other activities	0.5	10.0
Extended Trips		
% time spent fishing	90.0	51.2
% time spent diving/snorkeling	0.0	31.1
% time spent cruising/sightseeing	10.0	12.5
% time spent sailing	0.0	0.6
% time spent whale & dolphin watching	0.0	0.0
% time spent doing other activities	0.0	4.6

Location of Resource Use

Figure 16.2 shows the location of resource use by commercial charter operators in the Hervey Bay TRC. The location of resource use was primarily around Sandy Cape at the Northern end of Fraser Island, as well as the Capricorn-Bunker Group.

Charter Industry Businesses

Table 16.6 identifies the number of employees within the Hervey Bay TRC. The majority of businesses had between 1-5 fulltime employees. The average fulltime equivalent per business was 1.8. In summary it is estimated that there were 48 people employed in the charter industry within the Hervey Bay TRC over the previous year.

Business Ownership and Size

Table 16.7 shows the number of years the current owner or operator had owned the charter business. Most businesses had been owned for less than 5 years (69.2%). On average, businesses had been owned for 5.2 years, which is 1.8 years less than the Queensland average (7 years).

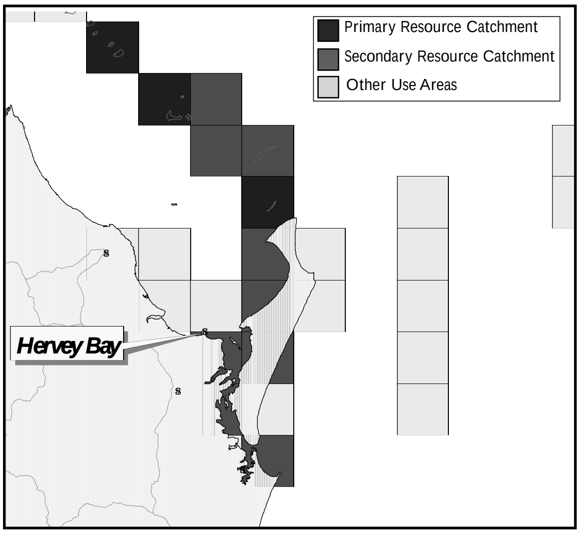

Figure 16.2. Hervey Bay TRC. Location of Resource Use

Table 16.6 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	7.7	8	61.5	8	61.5
1	5	38.5	2	15.4	2	15.4
2-3	2	15.4	2	15.4	2	15.4
4-5	5	38.5	1	7.7	1	7.7
Total Businesses	13	100.0	13	100.0	13	100.0
Total Employees	24		12		12	
Mean Number of Employees per Business				2.8		
Mean Number of Full-time Employees per Business				1.8		
Mean Number of Part-time & Casual Employees per Business				3.0		
Estimated Number Employed within the TRC				48		

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

Table 16.7 Number of Years of Current Ownership of the Charter Business

Number of Years	Sample Count	Percent within TRC	Cumulative Percent
1-5	9	69.2	69.2
6-10	3	23.1	92.3
11-15	0	0.0	92.3
15+	1	7.4	100.0
Total	13	100.0	100.0
Mean Number of Years owned or operated			5.2
Difference of TRC Mean to QLD Population Mean (7.0)			-1.8

Note: Standard errors for number of years ownership (sample = 1.8; QLD population = 0.5).

Table 16.8 shows that the average number of years the charter business had been operating was 8.2 years, which is similar to the average for all Queensland charter businesses (8.3 years). Over 61% of businesses had been in operation more than five years.

Table 16.8 Number of Years Business has been Operating

Number of Years	Sample Count	Percent within TRC	Cumulative Percent
1-5	5	38.5	38.5
6-10	4	30.7	69.2
11-15	3	23.1	92.3
15+	1	7.7	100.0
Total	13	100.0	100.0
Mean Number of Years owned or operated			8.2
Difference of Mean to Population Mean (8.3)			-0.1

Note: Standard errors for number of years operated (sample = 1.8; QLD population = 0.6)

Table 16.9 shows the number of boats operated by businesses in the Hervey Bay TRC. Most businesses owned one boat (76.9%), and the average was 1.3 per business, the same as the Queensland average (1.3).

Table 16.9 Number of Boats Operated by Charter Businesses

Number of Boats	Sample Count	Percent TRC
1	10	76.9
2	2	15.4
3	1	7.7
4+	0	0.0
Total Number of Businesses	13	100.0
Mean Number of Boats Operated		1.3
Difference of Mean to QLD Population Mean (1.3)		0

Note: Standard errors for number of boats operated (sample = 0.2; QLD population = 0.06)

Table 16.10 shows the frequency distribution of boat lengths for the Hervey Bay TRC. Most boats were between 11-14m, and the average (12.1m), and the average of the longest boat (13.1m) were slightly longer than the Queensland averages (11.4m and 11.7m respectively).

Table 16.10 Length of Vessels Operated by Charter Businesses

Length of Boat (metres)	Sample Count	Percent TRC
2-6	2	11.8
7-10	3	17.6
11-14	8	47.1
15-18	3	17.6
18-24	1	5.9
24+	0	0.0
Total Number of Boats	17	100.0
Mean Length of Boats Operated (metres)		12.1
Difference of Mean to QLD Population Mean (11.4)		+0.7
Mean Length of Largest Boat Operated (metres)		13.1
Difference of Mean to QLD Population Mean (11.7)		+1.4

Note: Standard errors for mean length of boats (sample = 1.2; QLD population=0.4) and mean length of largest boats (sample =1.2; QLD population=0.5).

Value of Production and Location of Sales

Table 16.11 shows the value of charter operations within the Hervey Bay TRC. The profile is similar to the Queensland profile, in that 69.2% of businesses earned less than $100,000. The mean income per business was $108,000, and the estimated GVP for the TRC was $1.8 million. This represents 5.4% of the Queensland charter income.

Table 16.11 Business Income (Annual value)

Value ($,000)	Sample Count	Sample Percent	Queensland Percent
Less than $100	9	69.2	65.8
$101 - $200	1	7.7	11.5
$201 - $300	2	15.4	7.5
$301 - $400	0	0.0	4.0
$401 - $500	1	7.7	6.0
$501 - $600	0	0.0	2.0
$601 - $700	0	0.0	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	13	100.0	100.0
Mean GVP for TRC			$108,000
Estimated Total GVP for TRC			$1,848,000
Estimated Total GVP for QLD Population			$ 34,419,000
Percent of Total Queensland Production			5.4%

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

Table 16.12 shows the number of customers that chartered trips from the Hervey Bay TRC over the previous 12 months. It is estimated that there were 18,650 customers, representing 5.4% of the total number of customers in Queensland.

Table 16.12 Number of Customers per Year

Count	Mean Customers per Business	Sample Count	Estimated Total
Hervey Bay TRC	1,097	12,069	18.652
QLD	1,335	259,930	343,100
Percent of Queensland	5.4%		

Table 16.13 shows the origin and associated value of customers visiting the Hervey Bay TRC. The value of sales was estimated at $1.8 million and was derived primarily from the Australian market (37.9%) and the Queensland market (32.9%). Substantial income was gained from both the local (15.4%) and overseas markets (13.8%).

Table 16.13 Origin and Value of Customers

	Sample Value Sales	Mean Percent	Estimated Sales
Local area	215,600	15.4	284,592
Queensland	460,600	32.9	607,992
Outside Queensland	530,600	37.9	700,392
Overseas	193,200	13.8	255,024
Total Sales	$1,400,000	100.0	$1,848,000

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

Business Expenditure

Table 16.14 shows that approximately $1 million was spent by businesses in the Hervey Bay TRC on business goods and services (excluding salaries and wages) over the previous year. The majority of this expenditure occurred in Hervey Bay (79.7%). Several other locations were used to purchase business goods and services.

Table 16.14 Town Location of Business Expenditure
(All costs, excluding salaries and wages)

Location of Expenditure	Sample Value of Expenditure	Percent of Sample	Estimated Expenditure
Hervey Bay	581,332	79.7	767,352
Urangan	43,764	6.0	57,768
Brisbane	40,846	5.6	53,917
Cairns	26,988	3.7	35,624
Weipa	21,153	2.9	27,921
Gold Coast	4,376	0.6	5,777
Bundaberg	4,376	0.6	5,777
Mooloolah	2,188	0.3	2,888
Overseas	2,188	0.3	2,888
SA	2,188	0.3	2,888
Total Expenditure	$729,400	100.0	$962,800

Note: Business expenditure includes all non-labour expenditure (ie. 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-OPERATORS PROFILES

Town of Residence

Table 16.15 shows the town of residence for charter operators from the Hervey Bay TRC. Most operators reside in Hervey Bay (92.3%), and 7.7% reside in Gladstone.

Table 16.15 Town of Residence

Town of Residence	Sample Count	Percent of Sample
Hervey Bay	12	92.3
Gladstone	1	7.7
Total	13	100.0

Months Employed in the Charter Industry

Table 16.16 indicates that less owner-operators were employed throughout the year than the Queensland average. During any month at least 69.2% were employed, however.

Table 16.16 Months Employed in the Charter Industry

Months	Owner Operators %	All QLD Operators
January	69.2	81.0
February	69.2	81.5
March	76.9	85.7
April	76.9	89.4
May	76.9	92.6
June	84.6	92.6
July	84.6	92.6
August	84.6	93.7
September	84.6	95.2
October	84.6	93.7
November	84.6	91.5
December	69.2	86.8

Table 16.17 shows the location of household expenditure derived from the charter industry for the Hervey Bay TRC. It is estimated that $0.5 million was spent on household commodities and services, and that the majority of this expenditure occurred in Hervey Bay (82%), Cairns (7.7%) and Urangan (7.4%). Several other Australian locations were recipients of this expenditure.

Table 16.17 Town Location of Household Expenditure (All commodities and services)

Location of Household Expenditure	Sample Value of Expenditure	Percent of Sample	Estimated Expenditure
Hervey Bay	282,326	82.0	372,690
Cairns	26,511	7.7	34,997
Urangan	25,478	7.4	33,633
Brisbane	3,443	1.0	4,545
South Australia	2,410	0.7	3,182
Bundaberg	2,066	0.6	2,727
Maroochydore	1,033	0.3	1,364
Maryborough	1,033	0.3	1,364
Total Expenditure	$344,300	100.0	$454,500

Note: The sample total personal income for the Hervey Bay TRC was $566,000. 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 $344,300. Estimated value of expenditure was calculated by multiplying the sample value of expenditure by 1.32

Source: CRC Reef (2000).

School and Employment Locations of Family Members

The town locations in which family members attended school or were employed are shown in Table 16.18. The main town for schooling and employment was Hervey Bay (76.6%). There were several other remote locations such as Weipa (6.4%), Victoria (4.3%), South Australia (4.3%) and Lizard Island (2.1%) that were also used.

Table 16.18 School and Employment Locations of Family Members

Location of Employment or School	Sample Count	Percent of Sample
Hervey Bay	36	76.6
Weipa	3	6.4
Victoria	2	4.3
South Australia	2	4.3
Brisbane	1	2.1
Lizard Island	1	2.1
New South Wales	1	2.1
Overseas	1	2.1
Total Family Members	47	100.0

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

Social and Demographic Profiles

Table 16.19 show the profiles of owner operators for the Hervey Bay TRC. Operators tended to have moved to find employment, were more likely to own their own home, were more likely to have completed Year 12, were more likely to have a business plan, and had larger families.

Table 16.19. Owner-Operator Profiles for the Hervey Bay TRC

Profile	Owner-Operators	All QLD Operators
Estimated Number of Charter-owners	13	191
Mean age of fisher	49.3	45.4
Age range	31-65	20-76
Percent males	100.0	93.8
Mean years resident in town	10.7	19.1
Mean number of years in charter industry	8.6	11.0
Mean hours per week in charter industry	55.6	50.7
Percent moved town to retain employment	23.1	14.0
Percent currently employed in other industry	46.2	46.1
Percent previously employed in other industry	100.0	93.7
Housing tenure (%)		
Rent	7.7	14.1
Mortgage	23.1	33.0
Own home	69.2	50.8
Other (eg, live with parents, on boat)	0.0	2.0
Educational		
Year completed school (%)		
Primary school	7.7	3.2
Year 8	0.0	3.2
Year 9	0.0	4.7
Year 10	38.5	32.6
Year 11	0.0	10.5
Year 12	53.8	45.8
Percent completed trade or TAFE certificate	33.3	52.2
Percent completed industry or business course	53.8	55.6
Percent with business plan	84.6	53.4
Marital Status		
Percent married or relationship	84.6	88.1
Partner's Income*		
Fulltime Employement	50.0	52.2
Part-time employment	30.0	23.3
Casual employment	10.0	8.8
Not employed	10.0	15.7
Family Composition		
Mean family size	3.8	3.2
Estimated number of total family members	50	596
Dependency Ratios		
Age Dependency Ratio**	28.6	21.7
Elderly Dependency Ratio	2.0	1.2
Child Dependency Ratio	26.5	20.6
Family Member Industry Dependency Ratio***	20.8	20.4
Gross Individual Income (%)		
Less than $16,000	25.0	39.2
$16,000 - $26,000	25.0	22.2
$26,000 - $36,000	25.0	9.5
$36,000 - $52,000	25.0	13.3
$52,000 - $78,000	0.0	9.5
Over $78,000	0.0	6.3
Average Income ($)	26,000	28,000

Note: * Percentage based on those charter operators with partners. Includes partner's 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.

17 MOOLOOLABA TRC

The Mooloolaba TRC consists of the main urban centres of Mooloolaba, Maroochydore, Tewantin, Noosa, Nambour, Caloundra and Kawana Waters.

BUSINESS PROFILES

Location and Use of Ports

Table 17.1 shows the number of license holders within the Mooloolabah 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 20 commercial charter operators within this TRC and a 95% certainty that the correct population count of commercial charter operators within the TRC is between 12 and 28. Figure 1 shows the geographic location of the Mooloolabah TRC.

Table 17.1 Location of Homeports

Town	Adj. Database Count	Sample Count	Estimated Count	Percent within TRC
Mooloolabah	2	10	13	65.0
Tewantin	5	2	3	15.0
Noosa	4	2	3	15.0
Maroochydore	3	1	1	5.0
Buddina	1	0	0	0.0
Buderim	2	0	0	0.0
Total TRC	17	15	20	100.0
95% Confidence Interval for Estimated TRC Count				12-28
Percent of Total Active License Holders in QLD				7.5%

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 17.2 shows the types of fishing charters from the Mooloolaba TRC over the previous year. On day trips, the fishing was predominately reef fishing (57%), game (19.9%), and estuarine (13.1%). On overnight trips, the fishing was mostly reef (33.3%) and game (33.3%). On overnight trips, reef fishing (50%), game fishing (25%) and estuarine fishing (11.3%) were the main fishing activities.

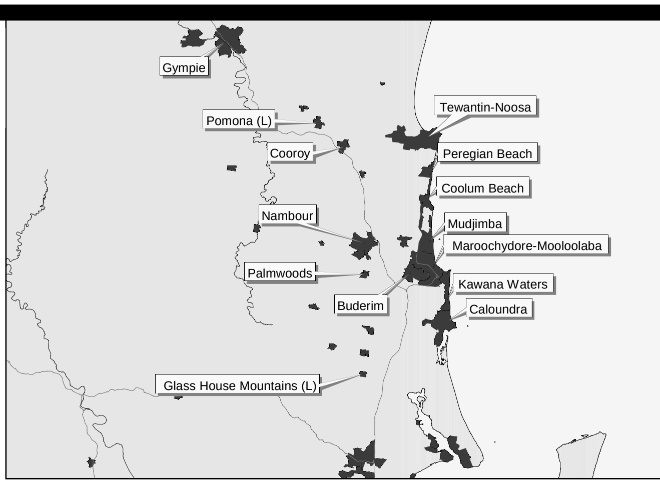

Figure 17.1 Location of the Mooloolaba TRC

Table 17.3 shows the number and type of charters from the Mooloolaba TRC over the previous year. Most charters were day trips (1,011 days), and 89.2% were predominately fishing charters, significantly higher than the Queensland average for day trips (70.2%). On overnight trips (138 days), fishing was much less of a focus (13%), than the Queensland average. On extended trips, however, fishing charters were 92.6% of the charters.

Table 17.4 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 most time was spent fishing (60.6%), and diving and snorkeling represented 20% of activities. On overnight and extended trips, fishing was also the main activity (95% and 95% respectively).

Table 17.5 shows that the peak months for charter activity within the Mooloolaba TRC were September to January.

Table 17.5 Peak Charter Months During Past 12 Months

Months	Sample Count	Percent within TRC	Percent of QLD Fishery
January	8	53.3	21.8
February	1	6.7	6.2
March	1	6.7	8.8
April	2	13.3	16.6
May	2	13.3	17.6
June	3	20.0	26.9
July	2	13.3	37.3
August	2	13.3	37.3
September	5	33.3	44.0
October	3	20.0	48.7
November	3	20.0	35.2
December	9	60.0	25.9

Table 17.2 Type of Fishing Activity (during the last 12 months)

	Day trips		Overnight trips		Extended trips	
Fishing Type	Mean % Time within TRC	Mean % Time QLD	Mean % Time within TRC	Mean % Time QLD	Mean % Time within TRC	Mean % Time QLD
Reef (bottom fishing)	57.0	47.5	33.3	66.0	50.0	51.2
Game (pelagic)	19.9	18.8	33.3	20.3	25.0	31.1
Estuary	13.1	26.8	16.7	11.6	11.3	12.5
Crabbing	0.0	0.5	1.7	0.2	1.2	0.5
Other	10.0	6.4	15.0	2.0	12.5	4.6
Total Sample	100.0	100.0	100.0	100.0	100.0	100.0

Table 17.3 Number of Charter Trips (during the last 12 months)

Type	Mean within TRC	QLD
Day Trips		
Mean number of day-trips (per business)	67.4	85.3
Mean number of fishing-only day-trips	60.1	59.9
Total number of day-trips	1,011	16,976
Total number of fishing-only day-trips	902	11,919
Percentage fishing-only	89.2%	70.2%
Overnight Trips		
Mean number of overnight trips (per business)	4.6	5.39
Mean number of fishing-only overnight-trips	0.6	3.34
Total number of days on overnight trips	138	1,072
Total number of fishing-only days on overnight trips	18	665
Percentage fishing-only	13.0%	62.0%
Extended Trips		
Mean number of extended-trips	1.9	6.9
Mean number of fishing-only extended-trips	1.8	4.49
Total number of days on extended trips	163	6,881
Total number of fishing-only days on extended trips	151	4,385
Percentage fishing-only	92.6%	66.1%
Mean number of days away (per business)	80.6	121.3
TOTAL days charter	1312	16,969
Percentage fishing only	81.6%	68.1%

Table 17.4 Other Activities on Charters (during the last 12 months)

Type	Within TRC	QLD Mean
Day Trips		
% time spent fishing	60.6	52.9
% time spent diving/snorkeling	20.0	13.1
% time spent cruising/sightseeing	5.4	17.5
% time spent sailing	0.0	0.4
% time spent whale & dolphin watching	0.0	4.2
% time spent doing other activities	14.0	11.9
Overnight Trips		
% time spent fishing	95.0	51.2
% time spent diving/snorkeling	0.0	22.9
% time spent cruising/sightseeing	0.0	15.9
% time spent sailing	0.0	0.0
% time spent whale & dolphin watching	0.0	0.0
% time spent doing other activities	5.0	10.0
Extended Trips		
% time spent fishing	95.0	51.2
% time spent diving/snorkeling0.0	31.1	
% time spent cruising/sightseeing	0.0	12.5
% time spent sailing	0.0	0.6
% time spent whale & dolphin watching	5.0	0.0
% time spent doing other activities	0.0	4.6

Location of Resource Use

Figure 17.2 shows the location of resource use by commercial charter operators in the Mooloolaba TRC. The location of resource use was primarily the area directly adjacent to Mooloolaba and north towards Noosa. The secondary resource catchment was around Tin Can Bay.

Charter Industry Businesses

Table 17.6 identifies the number of employees within the Mooloolaba TRC. The majority of businesses had over one fulltime employee (59%). There were 2.8 on average per business. It is estimated that there were 57 people employed in the charter industry within the Mooloolaba TRC over the previous year.

Business Ownership and Size

Table 17.7 shows the number of years the current owner-operator had owned the charter business. Most businesses were owned for less than 5 years (66.7%), and the average for the TRC was 5.3 years. This is nearly 2 years less than the Queensland average (7 years).

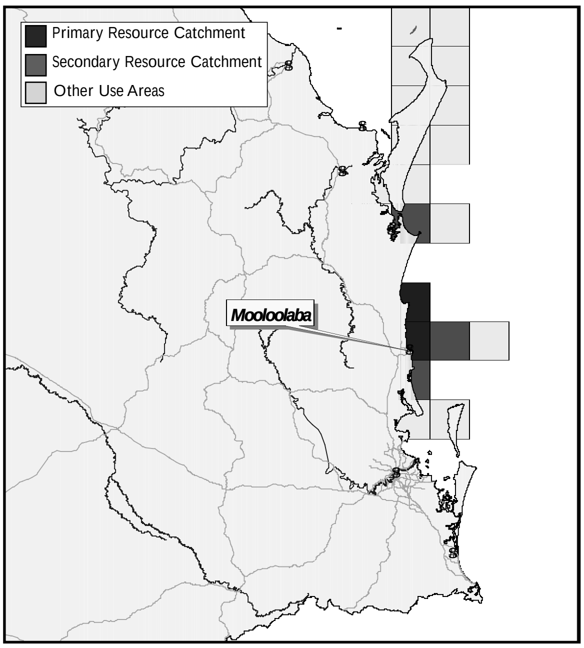

Figure 17.2 Mooloolaba TRC. Location of Resource Use

Table 17.6 Number of Employees

Number of Charter Employees	Full-Time Count	Full-Time Percent	Part-Time Count	Part-Time Percent	Casual Count	Casual Percent
Nil	6	40.0	10	66.7	10	66.7
1	5	33.3	2	13.3	2	13.3
2-3	1	6.7	3	20.0	1	6.7
4-5	1	6.7	0	0.0	1	6.7
5+	2	12.3	0	0.0	1	6.7
Total Businesses	15	100.0	15	100.0	15	100.0
Total Employees	28		8		21	
Mean Number of Employees per Business				2.8		
Mean Number of Full-time Employees per Business				1.9		
Mean Number of Part-time & Casual Employees per Business				1.9		
Estimated Number Employed within the TRC				57		

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

Table 17.7 Number of Years of Current Ownership of the Charter Business

Number of Years	Sample Count	Percent within TRC	Cumulative Percent
1-5	10	66.7	66.7
6-10	3	20.0	86.7
11-15	2	13.3	100.0
15+	0	0	0.0
Total	15	100.0	100.0
Mean Number of Years owned or operated			5.3
Difference of TRC Mean to QLD Population Mean (7.0)			-1.7

Note: Standard errors for number of years ownership (sample = 0.8; QLD population = 0.5).

Table 17.8 shows that the average number of years the charter business had been operating was 6.1 years, which was 2.2 years less than the average Queensland charter businesses (8.3 years).

Table 17.8 Number of Years Business has been Operating

Number of Years	Sample Count	Percent within TRC	Cumulative Percent
1-5	9	60.0	60.0
6-10	3	20.0	80.0
11-15	3	20.0	100.0
15+	0	0.0	0.0
Total	15	100.0	100.0
Mean Number of Years owned or operated			6.1
Difference of Mean to Population Mean (8.3)			-2.2

Note: Standard errors for number of years operated (sample = 1.0; QLD population = 0.6)

Table 17.9 shows that the majority of charter businesses within the Mooloolaba TRC operated one boat (73.3%). Some 13.3% of businesses operated more than 4 boats. The average number of boats owned in the TRC (1.6 boats) was slightly higher than the Queensland average (1.3 boats).

Table 17.9 Number of Boats Operated

Number of Boats	Sample Count	Percent TRC
1	11	73.3
2	2	13.3
3	0	0.0
4+	2	13.3
Total Number of Businesses	15	100.0
Mean Number of Boats Operated		1.6
Difference of Mean to QLD Population Mean (1.3)		+0.3

Note: Standard errors for number of boats operated (sample = 0.3; QLD population = 0.06)

Table 17.10 shows the frequency distribution of boat lengths within the Mooloolaba TRC. Most boats were between 11-18m (49.9%), and 4.2% were greater than 30m in length. The average boat length (12.4m) was 1m longer than the Queensland average (11.4m).

Table 17.10 Length of Vessels Operated by Charter Businesses

Length of Boat (metres)	Sample Count	Percent TRC
2-6	5	20.8
7-10	4	16.7
11-14	7	29.2
15-18	5	20.7
18-24	2	8.3
24-30	0	0.0
30+	1	4.2
Total Number of Boats	24	100.0
Mean Length of Boats Operated (metres)		12.4
Difference of Mean to QLD Population Mean (11.4)		+1.0
Mean Length of Largest Boat Operated (metres)		12.4
Difference of Mean to QLD Population Mean (11.7)		+0.7

Note: Standard errors for mean length of boats (sample = 1.9; QLD population=0.4) and mean length of largest boats (sample = 1.4; QLD population=0.5).

Value of Production and Location of Sales

Table 17.11 shows the value of charter operations within the Mooloolaba TRC for the twelve months prior to the survey. The profile shows that 73.3% of businesses earned less than $100,000, compared to 65.8% for the Queensland average. The mean value per business was $120,000, and the estimated GVP for the TRC was $2.4 million. The value of the charter industry in the Mooloolaba TRC was 6.9% of the Queensland value.

Table 17.11 Business Income (Annual value)

Value ($,000)	Sample Count	Sample Percent	Queensland Percent
Less than $100	11	73.3	65.8
$101 - $200	1	6.7	11.5
$201 - $300	1	6.7	7.5
$301 - $400	0	0.0	4.0
$401 - $500	1	6.7	6.0
$501 - $600	1	6.7	2.0
$601 - $700	0	0.0	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	15	100.0	100.0
Mean GVP for TRC			$120,000
Estimated Total GVP for TRC			$2,376,000
Estimated Total GVP for QLD Population			$ 34,419,000
Percent of Total Queensland Production			6.9%

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

Table 17.12 shows the number of customers over the previous year for the Mooloolaba TRC. It is estimated that there were 53,474 customers, representing 15.6% of the total Queensland patronage.

Table 17.12 Number of Customers per Year

	Mean Customers per Business	Sample Count	Estimated Total
Mooloolaba TRC	2,673	34,758	53,474
QLD	1,335	259,950	343,100
Percent of Queensland	15.6%		

Note: The estimated QLD count is based on an estimated 257 businesses.

Table 17.13 shows the value of sales and the origin of customers visiting the Mooloolaba TRC. It is estimated that there were $2.4 million worth of sales, and most of these were from the local area (42.1%).

Table 17.13 Origin and Value of Customers

	Sample Value of Sales	Mean Percent of Sample	Estimated Sales
Local area	757,800	42.1	1,000,296
Queensland	464,400	25.8	613,008
Outside Queensland	383,400	21.3	506,088
Overseas	194,400	10.8	256,608
Total Sales	$1,800,000	100.0	$2,376,000

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

Business Expenditure

Table 17.14 shows that approximately $1.2 million was spent by businesses in the Mooloolaba TRC on business goods and services (excluding salaries and wages) over the previous year. The majority of this expenditure occurred in Mooloolaba (45.2%), Tewantin (13.3%), Noosa (11.7%), Brisbane (7.7%) and Maroochydore (7%). Several other locations were recipients of this expenditure.

Table 17.14 Town Location of Business Expenditure
(All costs, excluding salaries and wages)

Location of Expenditure	Sample Value of Expenditure	Percent of Sample	Estimated Expenditure
Mooloolaba	423,886	45.2	559,531
Tewantin	124,727	13.3	164,641
Noosa	10,972	11.7	144,834
Brisbane	72,211	7.7	95,318
Maroochydore	65,646	7.0	86,653
Townsville	21,569	2.3	28,472
Kawana Waters	42,201	4.5	55,706
Caloundra	27,196	2.9	35,899
Cairns	19,694	2.1	25,996
Buddina	7,502	0.8	9,903
VIC	6,565	0.7	8,665
Bundaberg	3,751	0.4	4,952
Moggill	3,751	0.4	4,952
NSW	3,751	0.4	4,952
WA	3,751	0.4	4,952
Total Expenditure	$937,800	100.0	$1,237,900

Note: Business expenditure includes all non-labour expenditure (ie. 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 17.15 shows that charter operators in the Mooloolaba TRC resided mostly in Mooloolaba (40%), and also in several other nearby towns, including Brisbane (6.7%).

Table 17.15 Town of Residence

Town of Residence	Sample Count	Percent of Sample
Mooloolabah	6	40.0
Noosa Heads	2	13.3
Tewantin	2	13.3
Maroochydore	1	6.7
Buddina	1	6.7
Kawana Waters	1	6.7
Coolum	1	6.7
Brisbane	1	6.7
Total	15	100.0

Months Employed in the Charter Industry

Table 17.16 indicates that the majority of owner-operators within the Mooloolaba TRC were more likely to be employed between June and January. During March to May, only 66.7% of charter operators were employed.

Table 17.16 Months Employed in the Charter Industry During Past 12 Months

Months	Owner Operators %	All QLD Operators
January	80.0	81.0
February	73.3	81.5
March	66.7	85.7
April	66.7	89.4
May	66.7	92.6
June	80.0	92.6
July	80.0	92.6
August	80.0	93.7
September	80.0	95.2
October	86.6	93.7
November	86.6	91.5
December	86.6	86.8

Table 17.17 shows the location of household expenditure derived from the charter industry in the Mooloolaba TRC. It is estimated that $0.3 million was spent on household commodities and services, and that this was spent in Mooloolaba (32.4%), Noosa (12.7%), Tewantin (12.1%), Brisbane (10.3%) and several other towns in Queensland and NSW.

Table 17.17 Town Location of Household Expenditure (All commodities and services)

Location of Expenditure	Sample Value of of Sample	Percent Expenditure	Estimated Expenditure
Mooloolaba	84,337	32.4	111,359
Noosa Heads	33,058	12.7	43,650
Tewantin	31,496	12.1	41,588
Brisbane	26,811	10.3	35,401
Maroochydore	18,742	7.2	24,746
Caloundra	19,002	7.3	25,090
Buddina	17,440	6.7	23,028
Kawana Waters	14,317	5.5	18,904
Coolum	11,714	4.5	15,467
Noosa	1,562	0.6	2,062
Currimundi	781	0.3	1,031
NSW	781	0.3	1,031
Total Expenditure	$260,300	100.0	$343,700

Note: The sample total personal income for the Mooloolaba TRC was $428,000. 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 $260,300. Estimated value of expenditure was calculated by multiplying the sample value of expenditure by 1.32

Source: CRC Reef (2000).

School and Employment Locations of Family Members

The town locations in which family members attended school or were employed are shown in Table 17.18. Mooloolaba (34%), Noosa Heads (18%) and Tewantin (12%) were the main towns for schooling and employment of family members.

Table 17.18 School and Employment Locations of Family Members

Location of Employment or School	Sample Count	Percent of Sample
Mooloolaba	17	34.0
Noosa Heads	9	18.0
Tewantin	6	12.0
Buddina	4	8.0
Maroochydore	4	8.0
Brisbane	3	6.0
Coolum	2	4.0
Kawana Waters	2	4.0
Noosa	1	2.0
NSW	1	2.0
Overseas	1	2.0
Total Family Members	64	100.0

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

Social and Demographic Profiles

Table 17.19 shows the profiles of owner operators for the Mooloolaba TRC. Operators tended to work less hours per week, be employed in another industry concurrently, own their own home, have completed Year 12, use a business plan, and take more money home than the average Queensland charter operator.

Table 17.19. Owner-Operator Profiles for the Mooloolaba TRC

Profile	Owner-Operators	All QLD Charter operators
Estimated Number of Charter-owners	15	191
Mean age of fisher	42.7	45.4
Age range	25-59	20-76
Percent males	93.3	93.8
Mean years resident in town	19.9	19.1
Mean number of years in charter industry	7.9	11.0
Mean hours per week in charter industry	36.8	50.7
Percent moved town to retain employment	7.1	14.0
Percent currently employed in other industry	57.1	46.1
Percent previously employed in other industry	92.9	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	0.0	3.2
Year 9	0.0	4.7
Year 10	33.3	32.6
Year 11	6.7	10.5
Year 12	60.0	45.8
Percent completed trade or TAFE certificate	69.2	52.2
Percent completed industry or business course	57.1	55.6
Percent with business plan	60.0	53.4
Marital Status		
Percent married or relationship	93.3	88.1
Partner's Income*		
Full-time employment	53.8	52.2
Part-time employment	30.8	23.3
Casual employment	0.0	8.8
Not employed	15.4	15.7
Family Composition		
Mean family size	3.3	3.2
Estimated number of total family members	50	596
Dependency Ratios		
Age Dependency Ratio**	24.0	21.7
Elderly Dependency Ratio	0.0	1.2
Child Dependency Ratio	24.0	20.6
Family Member Industry Dependency Ratio***	8.3	20.4
Gross Individual Income (%)		
Less than $16,000	14.3	39.2
$16,000 - $26,000	14.3	22.2
$26,000 - $36,000	0.0	9.5
$36,000 - $52,000	42.9	13.3
$52,000 - $78,000	0.0	9.5
Over $78,000	28.6	6.3
Average Income ($)	47,000	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.*

18 BRISBANE TRC

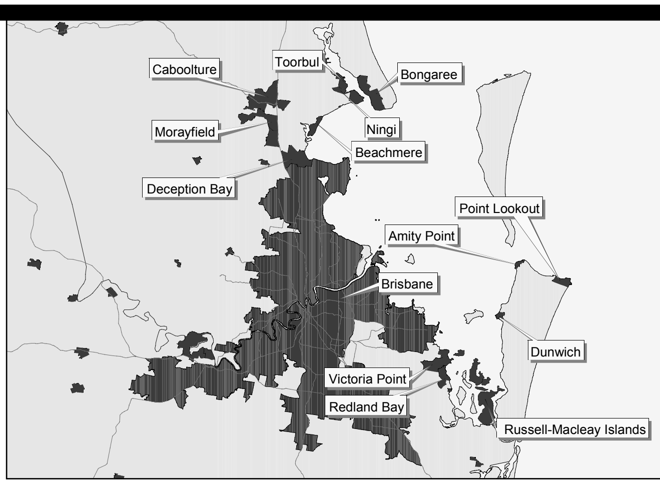

Figure 18.1 Location of the Brisbane TRC

The Brisbane TRC consists of the main urban centre of Brisbane, including Caboolture in the north and the Russel-Macleay Island Urban Centres in the South. The Brisbane TRC also includes North Stradbroke Island including the localities of Point Lookout and Amity Point. Essentially, the Brisbane TRC consists of all towns and communities adjacent to Morton Bay and while it may have been more reasonable to include distinct TRCs within the Brisbane TRC, the distribution sample locations did not permit this.

BUSINESS PROFILES

Location and Use of Ports

Table 18.1 shows the number of license holders within the Brisbane 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 24 commercial charter operators within this TRC and a 95% certainty that the correct population count of commercial charter operators within the TRC is between 15 and 33. Figure 1 shows the geographic location of the Brisbane TRC.

Table 18.1 Location of Homeports

Town	Adj. Database Count	Sample Count	Estimated Count	Percent within TRC
Brisbane	32	16	21	87.5
Amity Point	1	1	1	4.2
Point Lookout	2	1	1	4.2
Redcliffe	0	1	1	4.2
Burpengary	1	0	0	0.0
Deception Bay	1	0	0	0.0
Total TRC	37	19	24	100.0
95% Confidence Interval for Estimated TRC Count				15-33
Percent of Total Active License Holders in QLD				9.5%

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 18.2 shows the types of fishing charters from the Brisbane TRC over the previous year. On day trips, fishing charters were mainly reef fishing (62.5%) and game fishing (22.9%). On overnight trips, reef (80%) and game fishing (20%) were also the main charters, as on extended trips, reef (71%) and game fishing (28.3%) were the main charters.

Table 18.3 shows the number of charters from the Brisbane TRC and the proportion of charters that were primarily for fishing. Most charters from the TRC were day trips (874 days), and similarly to the Queensland average, 72.2% of day trips were chartered especially for fishing purposes. On overnight trips (84 days), the proportion of fishing trips was greater than the Queensland average (90.5%), and on extended trips (407 days), fishing made up 47.7% of trips.

Table 18.4 describes the activities that were undertaken on charters from the Brisbane TRC, and shows the proportion of time spent fishing on trips that were not chartered specifically for fishing. On day trips, fishing was a main activity (54.1%), as well as cruising and sightseeing (35.6%). On overnight trips 80% of time was spent fishing, and 20% diving and snorkeling. On extended trips fishing took up 55% of time and diving and snorkeling represented 33% of activities.

Table 18.5 shows that the peak months for charter activity within the Brisbane TRC were June to October, slightly earlier than the average Queensland peak season.

Table 18.2 Type of Fishing Activity (during the last 12 months)

	Day trips		Overnight trips		Extended trips	
Fishing Type	Mean % Time within TRC	Mean % Time QLD	Mean %Time within TRC	Mean %Time QLD	Mean % Time within TRC	Mean %Time QLD
Reef (bottom fishing)	62.5	47.5	80.0	66.0	71.0	51.2
Game (pelagic)	22.9	18.8	20.0	20.3	28.3	31.1
Estuary	0.0	26.8	0.0	11.6	0.7	12.5
Crabbing	0.4	0.5	0.0	0.2	0.0	0.5
Other	14.3	6.4	0.0	2.0	0.0	4.6
Total Sample	100.0	100.0	100.0	100.0	100.0	100.0

Table 18.3 Number of Charter Trips (during the last 12 months)

Type	Mean within TRC	QLD Mean
Day Trips		
Mean number of day-trips (per business)	48.6	85.3
Mean number of fishing-only day-trips	35.1	59.9
Total number of day-trips	874	16,976
Total number of fishing-only day-trips	631	11,919
Percentage fishing-only	72.2%	70.2%
Overnight Trips		
Mean number of overnight trips (per business)	2.33	5.39
Mean number of fishing-only overnight-trips	2.11	3.34
Total number of days on overnight trips	84	1,072
Total number of fishing-only days on overnight trips	76	665
Percentage fishing-only	90.5%	62.0%
Extended Trips		
Mean number of extended-trips	3.72	6.9
Mean number of fishing-only extended-trips	1.78	4.49
Total number of days on extended trips	407	6,881
Total number of fishing-only days on extended trips	194	4,385
Percentage fishing-only	47.7%	66.1%
Mean number of days away (per business)	73.1	121.3
TOTAL days charter	1,365	16,969
Percentage fishing only trips	66%	68.1%

Table 18.4 Amount of time on charters (during the last 12 months)

Type	Within TRC	QLD
Day Trips		
% time spent fishing	54.1	52.9
% time spent diving/snorkeling	3.4	13.1
% time spent cruising/sightseeing	35.6	17.5
% time spent sailing	0.0	0.4
% time spent whale & dolphin watching	4.6	4.2
% time spent doing other activities	2.3	11.9
Overnight Trips		
% time spent fishing	80.0	51.2
% time spent diving/snorkeling	20.0	22.9
% time spent cruising/sightseeing	0.0	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	55.0	51.2
% time spent diving/snorkeling	33.0	31.1
% time spent cruising/sightseeing	6.0	12.5
% time spent sailing	0.0	0.6
% time spent whale & dolphin watching	0.0	0.0
% time spent doing other activities	6.0	4.6

Table 18.5 Peak Charter Months During Past 12 Months

Months	Sample Count	Percent within TRC	Percent of QLD Fishery
January	4	22.2	21.8
February	0	0.0	6.2
March	0	0.0	8.8
April	2	11.1	16.6
May	3	16.7	17.6
June	6	33.3	26.9
July	7	38.9	37.3
August	8	44.4	37.3
September	8	44.4	44.0
October	8	44.4	48.7
November	2	11.1	35.2
December	3	16.7	25.9

Location of Resource Use

Figure 18.2 shows the location of resource use by commercial charter operators in the Brisbane TRC. The location of resource use was predominantly Moreton Bay. THe secondary resource catchment was predominatel located in the Swains Reefs.

Charter Industry Businesses

Table 18.6 identifies the number of employees within the Brisbane TRC. The majority of businesses had1 fulltime employee (owner-operator). The average fulltime equivlaent employee per business was 1.0. In summary it is estimated that there were 44 people employed in the charter industry over the previous year.

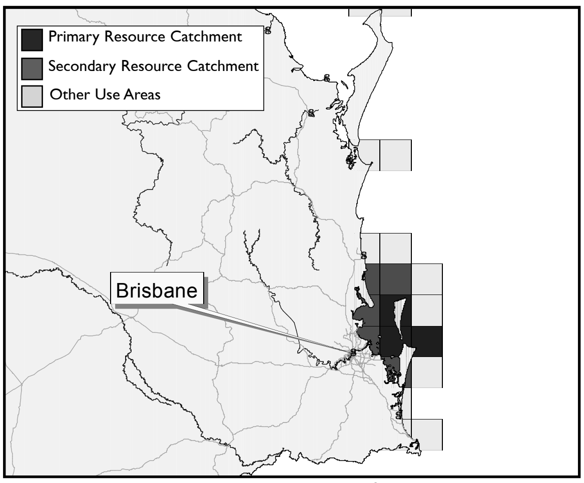

Figure 18.2 Brisbane TRC. Location of Resource Use

Table 2.7 Number of Employees

Number of Charter Employees	Full-Time Count	Full-Time Percent	Part-Time Count	Part-Time Percent	Casual Count	Casual Percent
Nil	5	27.8	12	66.7	9	50.0
1	8	44.4	2	11.1	5	27.8
2-3	5	27.8	3	16.8	4	22.2
4-5	0	0.0	1	5.6	0	0.0
Total Businesses	18	100.0	18	0.0	18	100.0
Total Employees	18		13		13	
Mean Number of Employees per Business			1.7			
Mean Number of Full-time Employees per Business			1.0			
Mean Number of Part-time & Casual Employees per Business			1.4			
Estimated Number Employed within the TRC			44			

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 18.7 shows the number of years the current owner or operator had owned the charter business. Most businesses had been owned for less than five years (61.1) and 16.7% had been owned for more than 15 years. The average for the TRC was 7.1, similar to the Queensland average (7 years).

Table 18.7 Number of Years of Current Ownership of the Charter Business

Number of Years	Sample Count	Percent within TRC	Cumulative Percent
1-5	11	61.1	61.1
6-10	3	16.7	77.8
11-15	1	5.6	83.3
15+	3	16.7	100.0
Total	18	100.0	100.0
Mean Number of Years owned or operated			7.1
Difference of TRC Mean to QLD Population Mean (7.0)			+0.1

Note: Standard errors for number of years ownership (sample = 1.8; QLD population = 0.5).

Table 18.8 shows that the average number of years the charter business had been operating was 7.1 years, which is less (1.2 years) than the average for all Queensland charter businesses (8.3 years).

Table 18.8 Number of Years Business has been Operating

Number of Years	Sample Count	Percent within TRC	Cumulative Percent
1-5	11	61.1	61.1
6-10	3	16.7	77.8
11-15	1	5.6	83.3
15+	3	16.7	100.0
Total	18	100.0	100.0
Mean Number of Years owned or operated			7.1
Difference of Mean to Population Mean (8.3)			-1.2

Note: Standard errors for number of years operated (sample = 1.8; QLD population = 0.6)

Table 18.9 shows the number of boats operated by businesses in the Brisbane TRC. The majority of charter businesses operated one boat (72.2%), and 11.1% operated three boats. The average number of boats owned (1.4) was similar to the Queensland average (1.3 boats).

Table 18.9 Number of Boats Operated by Charter Businesses

Number of Boats	Sample Count	Percent TRC
1	13	72.2
2	3	16.7
3	2	11.1
4+	0	0.0
Total Number of Businesses	18	100.0
Mean Number of Boats Operated		1.4
Difference of Mean to QLD Population Mean (1.3)		+0.1

Note: Standard errors for number of boats operated (sample = 0.2; QLD population = 0.06)

Table 18.10 shows the frequency distribution of boat-length for the Brisbane TRC. Most vessels were between 7-14m, and 4.2% were greater than 30m. The average boat length (10.5) was shorter than the Queensland average, and the average of the largest vessel owned (11.8m) was greater than the Queensland average.

Table 18.10 Length of Vessels Operated by Charter Businesses

Length of Boat (metres)	Sample Count	Percent TRC
2-6	5	20.8
7-10	7	29.2
11-14	7	29.2
15-18	3	12.5
18-24	3	12.5
24-30	0	0.0
30+	1	4.2
Total Number of Boats	24	100.0
Mean Length of Boats Operated (metres)		10.5
Difference of Mean to QLD Population Mean (11.4)		-0.9
Mean Length of Largest Boat Operated (metres)		11.8
Difference of Mean to QLD Population Mean (11.7)		+0.1

Note: Standard errors for mean length of boats (sample = 1.4; QLD population=0.4) and mean length of largest boats (sample=1.1; QLD population=0.5).

Value of Produc tion and Location of Sales

Table 18.11 shows the value of charter operations within the Brisbane TRC. The profile shows that most businesses (83.3%) earned less than $100,000, and that most businesses are at the lower end of the scale compared to the average Queensland profile. The mean value for businesses was $72,000, and the estimated total GVP for the TRC was $1.7 million, representing 5% of the charter industry in Queensland.

Table 18.11 Business Income (Annual value)

Value ($,000)	Sample Count	Sample Percent	Queensland Percent
Less than $100	15	83.3	65.8
$101 - $200	2	11.1	11.5
$201 - $300	0	0.0	7.5
$301 - $400	1	5.6	4.0
$401 - $500	0	0.0	6.0
$501 - $600	0	0.0	2.0
$601 - $700	0	0.0	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	18	100.0	100.0

Mean GVP for TRC	$72,000
Estimated Total GVP for TRC	$1,716,000
Estimated Total GVP for QLD Population	$ 34,419,000
Percent of Total Queensland Production	5.0%

Note: Estimated TRC population total is based on the sample GVP total multiplied by the sampling fraction of 1.32
Queensland total GVP is based on sampled GVP from all TRCs multiplied by the sampling fraction of 1.32

Table 18.12 shows the number of customers over the previous year for the Brisbane TRC. It is estimated that 8,627 people chartered trips from the Brisbane TRC, representing 2.5% of the Queensland industry.

Table 18.12 Number of Customers per Year

	Mean Customers per Business	Sample Count	Estimated Total
Brisbane TRC	359	6,111	8,627
QLD	1,335	259,950	343,100
Percent of Queensland	2.5%		

Note: The estimated QLD count is based on an estimated 257 businesses.

Table 18.13 shows the value and the origin of customers visiting the Brisbane TRC over the previous year. It is estimated that $1.7 million was earned through the charter industry, and that most of this revenue was obtained through the local market (60.2%).

Table 18.13 Origin and Value of Customers

	Sample Value of Sales	Mean Percent of Sample	Estimated Sales
Local area	782,600	60.2	1,033,032
Queensland	230,100	17.7	303,732
Outside Queensland	197,600	15.2	260,832
Overseas	89,700	6.9	118,404
Total Sales	$1,300,000	100.0	$1,716,000

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

Business Expenditure

Table 18.14 shows the location of business expenditure by businesses in the Brisbane TRC. It is estimated $0.9 million was spent on business goods and services over the previous year, and that most of this was spent in Brisbane (63.7%). Some 23 other locations in Australia and overseas were also recipients of this expenditure.

Table 18.14 Town Location of Business Expenditure (All costs, excluding salaries and wages)

Location of Expenditure	Sample Value of Expenditure	Percent of Sample	Estimated Expenditure
Brisbane	431,440	63.7	569,478
Manly	37,929	5.6	50,064
Yeppoon	34,542	5.1	45,594
Cairns	32,510	4.8	42,912
Toowoomba	26,415	3.9	34,866
Redcliffe	25,737	3.8	33,972
Murgon	18,964	2.8	25,032
Point Lookout	10,160	1.5	13,410
Cleveland	8,805	1.3	11,622
Gladstone	7,450	1.1	9,834
Overseas	6,773	1.0	8,940
Amity Point	5,418	0.8	7,152
Gold Coast	4,741	0.7	6,258
Esk	4,741	0.7	6,258
Townsville	4,064	0.6	5,364
NSW	3,387	0.5	4,470
Dunwich	3,387	0.5	4,470
Hervey Bay	2,032	0.3	2,682
Inveroona	2,032	0.3	2,682
SA	2,032	0.3	2,682
Bundaberg	1,355	0.2	1,788
Tewantin	1,355	0.2	1,788
Warwick	2,032	0.3	2,682
Yorkeys	1,355	0.2	1,788
Total Expenditure	$677,300	100.0	$894,000

Note: Business expenditure includes all non-labour expenditure (ie. 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 18.15 shows the towns of residence for charter operators in the Brisbane TRC. Most charter operators lived in Brisbane (77.7%). Some 5.5% lived in NSW.

Table 18.15 Town of Residence

Town of Residence	Sample Count	Percent of Sample
Brisbane	14	77.7
Amity Point	1	5.5
Point Lookout	1	5.5
Redcliffe	1	5.5
NSW	1	5.5
Total	18	100.0

Months Employed in the Charter Industry

Table 18.16 indicates that the majority of owner-operators within the Brisbane TRC were employed in the charter industry throughout the year, and all were employed between March and May, and in August and September.

Table 18.16 Months Employed in the Charter Industry During Past 12 Months

Months	Owner Operators %	All QLD Operators
January	88.2	81.0
February	88.2	81.5
March	100.0	85.7
April	100.0	89.4
May	100.0	92.6
June	94.1	92.6
July	94.1	92.6
August	100.0	93.7
September	100.0	95.2
October	94.1	93.7
November	94.1	91.5
December	94.1	86.8

Note: Owner-operator sample=17

Table 18.17 shows the location of household expenditure derived from the charter industry for the Brisbane TRC. It is estimated that $0.4 million was spent on household commodities and services, and that 61.3% was spent in Brisbane. The remaining amount was spent in approximately 17 other Australian locations.

Table 18.17 Town Location of Household Expenditure (all commodities and services)

Location of Household Expenditure	Sample Value of Expenditure	Percent of Sample	Estimated Expenditure
Brisbane	171,517	61.3	226,442
Gladstone	16,508	5.9	21,795
Toowoomba	16,508	5.9	21,795
Cooeeinbardi	6,508	5.9	21,795
Manly	15,669	5.6	20,686
Murgon	12,311	4.4	16,254
Point Lookout	9,233	3.3	12,190
Amity Point	5,036	1.8	6,649
Cleveland	3,917	1.4	5,172
Dunwich	3,078	1.1	4,063
Kingaroy	2,518	0.9	3,325
Gold Coast	1,959	0.7	2,586
NSW	1,399	0.5	1,847
Redcliffe	1,399	0.5	1,847
VIC	560	0.2	739
East Brisbane	560	0.2	739
Bundaberg	560	0.2	739
Capalaba	560	0.2	739
Total Expenditure	$279,800	100.0	$369,400

Note: The sample total personal income for the Brisbane TRC was $460,000. 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 $279,800. 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 18.18. Brisbane (51.6%), Gladstone (10.9%) and Point Lookout (7.8%) were the main towns for school and employment of family members.

Table 18.18 School and Employment Locations of Family Members

Location of Employment or School	Sample Count	Percent of Sample
Brisbane	33	51.6
Gladstone	7	10.9
Point Lookout	5	7.8
Murgon	4	6.3
Dunwich	3	4.7
Redcliffe	3	4.7
New South Wales	3	4.7
Amity Point	2	3.1
Cleveland	2	3.1
Airlie Beach	1	1.6
Ravenshoe	1	1.6
Total Family Members	64	100.0

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

Social and Demographic Profiles

Table 18.19 show the profiles of owner operators for the Brisbane TRC. Operators tended to have lived in their resident towns for longer, work less hours per week in the industry, have a mortgage, have a trade certificate and use a business plan, were more likely to be married, have larger families and have a higher level of dependency.

Table 18.19. Owner-Operator Profiles for the Brisbane TRC

Profile	Owner-Operators	All QLD Charter operators
Estimated Number of Charter-owners	18	191
Mean age of operator	47.8	45.4
Age range	28-6	20-76
Percent males	94.4	93.8
Mean years resident in town	26.8	19.1
Mean number of years in charter industry	11.8	11.0
Mean hours per week in charter industry	32.1	50.7
Percent moved town to retain employment	0.0	14.0
Percent currently employed in other industry	50.0	46.1
Percent previously employed in other industry	100.0	93.7
Housing tenure (%)		
Rent	0.0	14.1
Mortgage	41.2	33.0
Own home	58.8	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	0.0	3.2
Year 9	0.0	4.7
Year 10	33.3	32.6
Year 11	11.1	10.5
Year 12	55.6	45.8
Percent completed trade or TAFE certificate	62.5	52.2
Percent completed industry or business course	41.2	55.6
Percent with business plan	61.1	53.4
Marital Status		
Percent married or relationship	94.4	88.1
Partner's Incomede		
Full-time employment	38.5	52.2
Part-time employment	38.5	23.3
Casual employment	7.7	8.8
Not employed	15.4	15.7
Family Composition		
Mean family size	4.0	3.2
Estimated number of total family members	72	596
Dependency Ratios		
Age Dependency Ratio**	29.2	21.7
Elderly Dependency Ratio	2.8	1.2
Child Dependency Ratio	26.4	20.6
Family Member Industry Dependency Ratio***	22.9	2.04
Gross Individual Income (%)		
Less than $16,000	35.3	39.2
$16,000 - $26,000	35.3	22.2
$26,000 - $36,000	0.0	9.5
$36,000 - $52,000	5.9	13.3
$52,000 - $78,000	11.8	9.5
Over $78,000	11.8	6.3
Average Income ($)	30,350	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.*

19 SOUTHPORT TRC

The Southport TRC consists of the main urban centre of the Gold Coast, including Paradise Point and Southport in the north and Coolangatta in the South.

BUSINESS PROFILES

Location and Use of Ports

Table 19.1 shows the number of license holders within the Southport 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 35 commercial charter operators within this TRC and a 95% certainty that the correct population count of commercial charter operators within the TRC is between 21 and 41. Figure 1 shows the geographic location of the Southport TRC.

Table 19.1 Location of Homeports

Town	Adj. Database Count	Sample Count	Estimated Count	Percent within TRC
Gold Coast	20	10	13	41.9
Southport	4	5	7	22.6
Surfers Paradise	6	2	3	9.7
Runaway Bay	4	2	3	9.7
Nerang	2	2	3	3.2
Beaudesert	1	2	3	3.2
Currumbin	1	1	1	3.2
Stradbroke Island	0	1	1	3.2
Sunshine Coast	0	1	1	3.2
Toowoomba	1	0	0	0.0
Total TRC	38	26	35	100.0
95% Confidence Interval for Estimated TRC Count				21-41
Percent of Total Active License Holders in QLD				12.6%

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

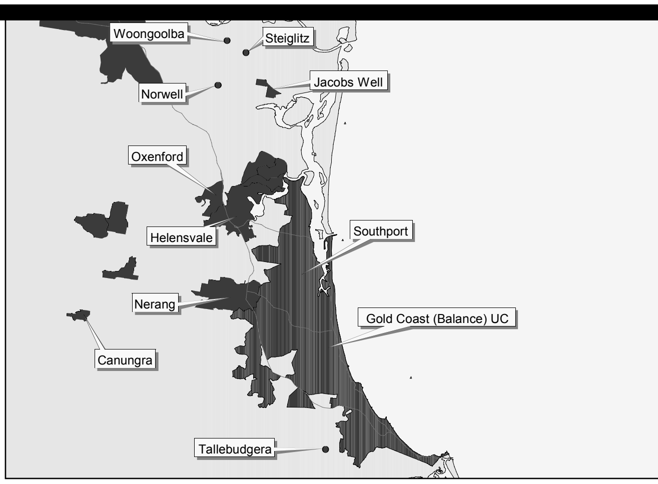

Figure 19.1 Location of the Southport TRC

Fishing Activity

Table 19.2 shows the types of fishing charters undertaken from the Southport TRC over the previous year. On day trips reef fishing (47.4%) and estuarine fishing (32.2%) were the main fishing charters. On overnight fishing trips, reef fishing (62.5%), estuarine (26.8%) and game (12.5%) were the main activities, and on extended trips the main fishing undertaken was estuarine (50%), game (40%) and reef (10%).

Table 19.3 shows the number of trips that were chartered from the Southport TRC over the previous year and the percentage that were chartered primarily for fishing. Most charters from the Southport TRC were day trips (3,084 days), and similarly to the Queensland average, most day trips were fishing charters. All overnight trips (120 days) were fishing charters, and 59.6% of extended trips were fishing-only.

Table 19.4 shows the percentage of time spent fishing and doing other activities on charters where fishing was not the only activity. On day trips fishing made up 66.7% of activities, and cruising/sightseeing made up 20%. There were no overnight trips that were not fishing charters. On extended trips, fishing represented 66.6% of activities, and the rest of the time was spent cruising/sightseeing (33.3%).

Table 19.5 shows that the peak months for charter activity within the Southport TRC were October to January which is later, and shorter, than the average Queensland peak season (July to December).

Table 19.5 Peak Charter Months During Past 12 Months

Months	Sample Count	Percent within TRC	Percent of QLD Fishery
January	14	53.8	21.8
February	5	19.2	6.2
March	5	19.2	8.8
April	3	11.5	16.6
May	2	7.7	17.6
June	3	11.5	26.9
July	4	15.4	37.3
August	2	7.7	37.3
September	5	19.2	44.0
October	8	30.8	48.7
November	8	30.8	35.2
December	10	38.5	25.9

Table 19.2 Type of Fishing Activity (during the last 12 months)

	Day trips		Overnight trips		Extended trips	
Fishing Type	Mean % within TRC	Mean % QLD	Mean % within TRC	Mean % QLD	Mean % within TRC	Mean % QLD
Reef (bottom fishing)	47.4	47.5	62.5	66.0	10.0	51.2
Game (pelagic)	7.4	18.8	12.5	20.3	40.0	31.1
Estuary	32.2	26.8	25.0	11.6	50.0	12.5
Crabbing	0.0	0.5	0.0	0.2	0.0	0.5
Other	13.0	6.4	0.0	2.0	0.0	4.6
Total Sample	100.0	100.0	100.0	100.0	100.0	100.0

Table 19.3 Number of Charter Trips (during the last 12 months)

Type	Mean within TRC	QLD Mean
Day Trips		
Mean number of day-trips (per business)	118.6	85.3
Mean number of fishing-only day-trips	86.3	59.9
Total number of day-trips	3,084	16,976
Total number of fishing-only day-trips	2,244	11,919
Percentage fishing-only trips	72.8%	70.2%
Overnight Trips		
Mean number of overnight trips (per business)	2.31	5.39
Mean number of fishing-only overnight-trips	2.31	3.34
Total number of days on overnight trips	120	1,072
Total number of fishing-only days on overnight trips	120	665
Percentage fishing-only trips	100.0%	62.0%
Extended Trips		
Mean number of extended-trips	1.04	6.9
Mean number of fishing-only extended-trips	0.62	4.49
Total number of days on extended trips	94	6,881
Total number of fishing-only days on extended trips	56	4,385
Percentage fishing-only trips	59.6%	66.1%
Mean number of days away (per business)	125.1	121.3
TOTAL days charter	3298	16,969
Percentage charter- fishing only	73.4%	68.1%

Table 19.4 Other Activities on Charters (during the last 12 months)

Type	Within TRC	QLD
Day Trips		
% time spent fishing	66.7	52.9
% time spent diving/snorkeling	0.0	13.1
% time spent cruising/sightseeing	20.0	17.5
% time spent sailing	0.0	0.4
% time spent whale & dolphin watching	0.8	4.2
% time spent doing other activities	12.5	11.9
Overnight Trips		
% time spent fishing	0.0	51.2
% time spent diving/snorkeling	0.0	22.9
% time spent cruising/sightseeing	0.0	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	66.6	51.2
% time spent diving/snorkeling	0.0	31.1
% time spent cruising/sightseeing	33.3	12.5
% time spent sailing	0.0	0.6
% time spent whale & dolphin watching	0.0	0.0
% time spent doing other activities	0.0	4.6

Location of Resource Use

Figure 192 shows the location of resource use by commercial charter operators in the Southport TRC. The location of primary resource use is immediately adjacent to Southport and towards Brisbane.

Charter Industry Businesses

Table 19.6 identifies the number of employees within the Southport TRC. The majority of businesses had 1 fulltime employee (46.2%), and the average fulltime equvalent per business was 1.2. It is estimated that there were 66 people employed in the charter industry within the Southport TRC over the previous year.

Business Ownership and Size

Table 19.7 shows the number of years the current owner or operator had owned the charter business. On average, businesses within the Southport TRC had been owned for 5.6 years, with 83.8% of businesses owned for less than 5 years.

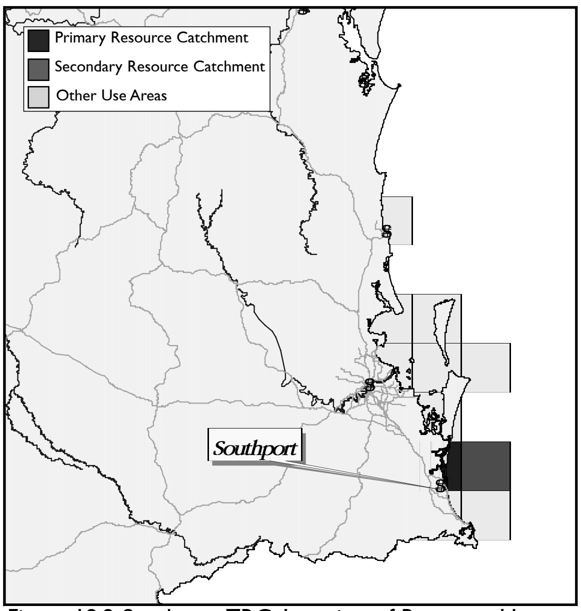

Figure 19.2 Southport TRC. Location of Resource Use

Table 19.6 Number of Employees

Number of Charter operators	Full-Time Count	Full-Time Percent	Part-Time Count	Part-Time Percent	Casual Count	Casual Percent
Nil	7	26.9	17	65.4	18	69.2
1	12	46.2	4	15.4	5	19.2
2-3	6	23.0	4	15.4	2	7.6
4-5	1	3.8	1	3.8	1	3.8
Total Businesses	26	100.0	26	100.0	26	100.0
Total Charter operators	31		18		17	
Mean Number of Charter operators per Business				1.9		
Mean Number of Full-time Charter operators per Business				1.2		
Mean Number of Part-time & Casual Charter operators per Business				1.3		
Estimated Number Employed within the TRC				66		

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

Table 19.7 Number of Years of Current Ownership of the Charter Business

Number of Years	Sample Count	Percent within TRC	Cumulative Percent
1-5	21	83.8	83.8
6-10	2	7.6	91.4
11-15	0	0.0	91.4
15+	2	7.6	100.0
Total	25	100.0	100.0
Mean Number of Years owned or operated			5.6
Difference of TRC Mean to QLD Population Mean (7.0)			-1.4

Note: Standard errors for number of years ownership (sample = 1.5; QLD population = 0.5).

Table 19.8 shows that the average number of years the charter business had been operating was 4.6 years, which is nearly 4 years less than the average for all Queensland charter businesses (8.3 years).

Table 19.8 Number of Years Business has been Operating

Number of Years	Sample Count	Percent within TRC	Cumulative Percent
1-5	22	83.6	83.6
6-10	2	7.6	91.2
11-15	0	0.0	91.2
15+	2	7.6	100.0
Total	26	100.0	100.0
Mean Number of Years owned or operated			4.6
Difference of Mean to Population Mean (8.3)			-3.7

Note: Standard errors for number of years operated (sample = 1.2; QLD population = 0.6)

Table 19.9 shows the number of boats owned by businesses in the Southport TRC. Most businesses owned and operated one boat (76.9%), and 15.4% of businesses owned 3 boats.

Table 19.10 Number of Boats Operated by Businesses

Number Boats	Sample Count	Percento TRC
1	20	76.9
2	2	7.7
3	4	15.4
4+	0	0.0
Total Number of Businesses	26	100.0
Mean Number of Boats Operated		1.3
Difference of Mean to QLD Population Mean (1.3)		0.0

Note: Standard errors for number of boats operated (sample = 0.2; QLD population = 0.06)

Table 19.10 shows the frequency distribution of boat lengths for the Southport TRC. Many boats (38.9%) were less than 6m in length, and 30.6% were between 7-10m. The average length (7.9m) and the average length of the largest vessel (8.8m) were both smaller than the respective Queensland averages (11.4m and 11.7m).

Table 19.10 Length of Vessels Operated by Charter Businesses

Length of Boat (metres)	Sample Count	Percent TRC
2-6	14	38.9
7-10	11	30.6
11-14	10	27.8
15-18	1	27.8
18-24	0	0.0
24+	0	0.0
Total Number of Boats	36	100.0
Mean Length of Boats Operated (metres)		7.9
Difference of Mean to QLD Population Mean (11.4)		-3.5
Mean Length of Largest Boat Operated (metres)		8.8
Difference of Mean to QLD Population Mean (11.7)		-2.9

Note: Standard errors for mean length of boats (sample = 0.5; QLD population=0.4) and mean length of largest boats (sample=0.6; QLD population=0.5).

Value of Operation and Location of Sales

Table 19.11 shows the value of charter operations within the Southport TRC for the twelve months prior to the survey. The profile for the TRC was generally similar to the Queensland profile, where 65.4% of businesses earned less than $100,000. The mean for the TRC was $97,000, and the estimated total GVP for the TRC was $3.3 million, representing 9.7% of the Queensland charter income.

Table 19.12 shows the number of customers that chartered trips from the Southport TRC over the previous year. It is estimated that 40,756 people were customers, representing 11.9% of the Queensland charter patronage.

Table 19.11 Business Income (Annual value)

Value ($,000)	Sample Count	Sample Percent	Queensland Percent
Less than $100	17	65.4	65.8
$101 - $200	6	23.1	11.5
$201 - $300	1	3.8	7.5
$301 - $400	1	3.7	4.0
$401 - $500	0	0.0	6.0
$501 - $600	1	3.7	2.0
$601 - $700	0	0.0	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	26	100.0	100.0
Mean GVP for TRC			$97,000
Estimated Total GVP for TRC			$3,333,000
Estimated Total GVP for QLD Population			$ 34,419,000
Percent of Total Queensland Production			9.7%

Note: *Estimated TRC population total is based on the sample GVP total multiplied by the sampling fraction of 1.32. Queensland total GVP is based on sampled GVP from all TRCs multiplied by the sampling fraction of 1.32*

Table 19.12 Number of Customers per Year

Count	Mean per Business	Sample Count	Estimated Total
TRC	1,314	27,609	40,756
QLD	1,335	259,930	343,100
Percent of Queensland	11.9%		

Note: *Sample count=26. The estimated value is based on estimated 35 businesses (table 2.1).*
The estimated QLD count is based on an estimated 257 businesses.

Table 19.13 shows the value and the origin of customers visiting the Southport TRC. It is estimated that $3.3 million was earned by the industry, and that the majority of this income was from overseas customers (32.6%), as well as the local area (31.9%).

Table 19.13 Origin and Value of Customers

	Sample Value of Sales	Mean Percent of Sample	Estimated Sales
Local area	805,475	31.9	1,063,227
Queensland	494,900	19.6	653,268
Australians	401,475	15.9	529,947
Overseas	823,150	32.6	1,086,558
Total Sales	$2,525,000	100.0	$3,333,000

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

Business Expenditure

Table 19.14 shows that approximately $1.7 million was spent by businesses in the Southport TRC on business goods and services (excluding salaries and wages) in the previous year. The majority of this expenditure occurred in the Goldcoast (36.7), Southport (19.5%), and in Brisbane (11.9%). Several other towns and locations both locally and around Australia were recipients of this expenditure.

Table 19.14 Town Location of Business Expenditure (All costs, excluding salaries and wages)

Location of Expenditure	Sample Value of Expenditure	Percent of Sample	Estimated Expenditure
Gold Coast	482,789	36.7	637,296
Southport	256,523	19.5	338,618
Brisbane	156,545	11.9	206,644
Surfers Paradise	59,198	4.5	78,143
Beaudesert	57,882	4.4	76,406
Currumbin	47,358	3.6	62,514
Kawana	40,781	3.1	53,832
Nerang	31,572	2.4	41,676
Runaway Bay	30,257	2.3	39,940
Cairns	23,679	1.8	31,257
Fraser Island	22,364	1.7	29,521
Townsville	19,733	1.5	26,048
Wooloongabba	14,471	1.1	19,102
Main Beach	13,155	1.0	17,365
Woongoolba	13,155	1.0	17,365
NSW	10,524	0.8	13,892
Bundaberg	6,578	0.5	8,683
Manly	5,262	0.4	6,946
Coolum	3,947	0.3	5,210
Toowoomba	3,947	0.3	5,210
WA	3,947	0.3	5,210
Ashmore	2,631	0.2	3,473
Boreen Point	2,631	0.2	3,473
Capalaba	2,631	0.2	3,473
Raby Bay	2,631	0.2	3,473
Sunshine Coast	1,316	0.1	1,737
Total Expenditure	$1,315,500	100.0	$1,736,500

Note: *Business expenditure includes all non-labour expenditure (ie. 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 19.15 shows the towns in which charter operators from the Southport TRC reside. Charter operators lived mostly in the Goldcoast (33.3%) and Southport (12.5%), as well as several other Queensland towns.

Table 19.15 Town of Residence

Town of Residence	Sample Count	Percent of Sample
Goldcoast	8	33.3
Southport	3	12.5
Beaudesert	1	4.2
Currumbin	1	4.2
Robina	1	4.2
Toowoomba	1	4.2
Raby Bay	1	4.2
Runaway Bay	1	4.2
Caboolture	1	4.2
Palm Beach	1	4.2
Surfers Paradise	1	4.2
Mudgeeraba	1	4.2
Fraser Island	1	4.2
Brisbane	1	4.2
Kawana	1	4.2
Total	24	100.0

Months Employed in the Charter Industry

Table 19.16 indicates that all owner-operators within the Southport TRC were employed throughout the year.

Table 19.16 Months Employed in the Charter Industry During Past 12 Months

Months	Owner Operators %	All QLD Operators
January	100.0	81.0
February	100.0	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	95.5	86.8

Table 19.17 shows the location of household expenditure derived from the charter industry for the Southport TRC. It is estimated that $0.6 million was spent on household items, and that the majority was spent in the Gold Coast (30.1%), Southport (13.6%) and Brisbane (10.4%). Several other Queensland towns were recipients of this expenditure.

Table19.17 Town Location of Household Expenditure (all commodities and services)

Location of Household Expenditure	Sample Value of Expenditure	Percent of Sample	Estimated Expenditure
Gold Coast	129,280	30.1	170,637
Southport	58,412	13.6	77,098
Brisbane	44,668	10.4	58,958
Surfers Paradise	20,187	4.7	26,644
Fraser Island	18,039	4.2	23,810
Toowoomba	18,039	4.2	23,810
Kawana	18,039	4.2	23,810
Beaudesert	18,039	4.2	23,810
Currumbin	18,039	4.2	23,810
Caboolture	16,321	3.8	21,542
Ashmore	12,885	3.0	17,007
Nerang	13,744	3.2	18,141
Elanora	10,738	2.5	14,173
Robina	10,308	2.4	13,606
Cairns	9,020	2.1	11,905
Cleveland	9,020	2.1	11,905
Broadbeach	1,289	0.3	1,701
Runaway Bay	1,289	0.3	1,701
Helenvale	859	0.2	1,134
NSW	859	0.2	1,134
Palm Beach	859	0.2	1,134
Total Expenditure	$429,500	100.0	$566,900

Note: The sample total personal income for the Cairns TRC was $706,000. 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 $429,500. Estimated value of expenditure was calculated by multiplying the sample value of expenditure by 1.32

Source: CRC Reef (2000).

School and Employment Locations of Family Members

The town locations in which family members attended school or were employed are shown in Table 19.18. The Gold Coast (34.5%) and Southport (20.9%) were the main towns for school and employment of family members.

Table 19.18 School and Employment Locations of Family Members

Location of Employment or School	Sample Count	Percent of Sample
Gold Coast	23	34.5
Southport	14	20.9
Beaudesert	5	7.5
Toowoomba	5	7.5
Currumbin	3	4.5
Surfers Paradise	3	4.5
Kawana	3	4.5
Brisbane	2	3.0
Overseas	2	3.0
Miami	1	1.5
Elanora	1	1.5
Runaway Bay	1	1.5
Wooloongabba	1	1.5
Stradbroke Island	1	1.5
Bayview Heights	1	1.5
Vic	1	1.5
Total Family Members	41	100.0

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

Social and Demographic Profiles

Table 19.19 shows the profiles of owner operators for the Southport TRC. In comparison to the Queensland average, operators tended to have business plan, be married, have a spouse with casual employment, and have more family members involved in the industry.

Table 19.19 Owner-Operator Profiles for the Southport TRC

Profile	Owner-Operators	All QLD Operators
Estimated Number of Charter-owners	25	191
Mean age of fisher	46	45.4
Age range	24-60	20-76
Percent males	96.0	93.8
Mean years resident in town	20.8	19.1
Mean number of years in charter industry	9.5	11.0
Mean hours per week in charter industry	41.9	50.7
Percent moved town to retain employment	4.2	14.0
Percent currently employed in other industry	45.8	46.1
Percent previously employed in other industry	95.8	93.7
Housing tenure (%)		
Rent	20.8	14.1
Mortgage	33.3	33.0
Own home	41.7	50.8
Other (eg, live with parents, on boat)	4.2	2.0
Educational		
Year completed school (%)		
Primary school	0.0	3.2
Year 8	8.3	3.2
Year 9	8.3	4.7
Year 10	29.2	32.6
Year 11	4.2	10.5
Year 12	50.0	45.8
Percent completed trade or TAFE certificate	34.8	52.2
Percent completed industry or business course	58.3	55.6
Percent with business plan	65.2	53.4
Marital Status		
Percent married or relationship	100.0	88.1
Partner's Income*		
Full-time employment	45.5	52.2
Part-time employment	22.7	23.3
Casual employment	13.6	8.8
Not employed	18.2	15.7
Family Composition		
Mean family size	3.2	3.2
Estimated number of total family members	76	596
Dependency Ratios		
Age Dependency Ratio**	18.4	21.7
Elderly Dependency Ratio	0.0	1.2
Child Dependency Ratio	18.4	20.6
Family Member Industry Dependency Ratio***	24.3	20.4
Gross Individual Income (%)		
Less than $16,000	43.8	39.2
$16,000 - $26,000	37.5	22.2
$26,000 - $36,000	6.3	9.5
$36,000 - $52,000	6.3	13.3
$52,000 - $78,000	0.0	9.5
Over $78,000	0.0	6.3
Average Income ($)	30,350	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.*