Fisheries Queensland: Operator Survey Final Report

Friday 19 June 2020

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Introduction and Methodology

Action Market Research and Hudson Howells were engaged by BDO EconSearch and to undertake research into the Queensland charter boat fishing industry to better to understand the needs and wants of its main client group (recreational fishers) and the capacity of the industry to meet future demand, and identify and describe growth opportunities for the charter boat fishing industry in Queensland.

This research has the following four key phases:

- **Phase 1** – Rapid Appraisal Interviews with key stakeholders in the industry (Completed November 2019)
- **Phase 2** – Operator Depth Interviews (Completed November 2019)
- **Phase 3** – Recreational Fishing Trip Client Survey (Completed February 2020)
- **Phase 4** – Licence Holder/Operator Survey (Completed May 2020) **(this report)**

This report details the findings captured from the Licence Holder/Operator Survey, undertaken from 28 March – 5 May 2020. A mixed-methodology has been used to maximise the number of completed interviews, including:

- Telephone interviewing with licence holders (majority of surveying was completed this way).
- Email survey option was offered if preferred.

A total of 100 completed interviews has been achieved. Results are presented by total, by business model, by day trip operators vs multi-day operators and, where applicable, by region and business performance in the last 12 months (improved, stayed the same or declined).

A Note On COVID-19

The phone interviews component of this research was undertaken during the COVID-19 pandemic.

The first 10 interviews were completed between the 28th and 30th March 2020. A decision was made to pause the phone interviews after these first interviews were completed due to the significant uncertainty caused by the pandemic, and the business restrictions enforced by the Federal and State Governments.

The end of March and early April 2020 was a time of increasing rates of COVID-19 infection coupled with frequently changing government restrictions, including implementation of social distancing rules, the closure of State/Territory and International borders, requirements to work from home for most businesses or closure of other businesses, and the introduction of *JobSeeker* and *JobKeeper* support packages. This was a time of significant social upheaval including panic buying by the community of essential items (e.g. toilet paper), and the cancellation of many sporting events, business and personal travel arrangements, arts and cultural events, conferences and trade shows.

The phone interviews continued from April 14th 2020 at which point the government restrictions had time to be considered and understood by businesses, and the first signs of Australia flattening the curve of infection rates was being seen. The Government stimulus packages were well received and supported by business, and provided greater certainty for the foreseeable future, and a 'new normal' way of operating had been implemented by many businesses.

All interviews were conducted with this context in mind, and interviewers were instructed to probe for more issues and ideas beyond the impacts of COVID-19. However the Charter Fishing industry in Queensland has been severely impacted by the pandemic, and continues to be impacted due to the social distancing rules, travel restrictions and border closures. At the time of writing this report (June 2020), some of these restrictions are likely to be lifted in late July 2020, however it is uncertain as to when the international borders will re-open.

Demographics - Overall

A1	Average number of years worked in CB industry	17 years

A2	Average number of years owned a licence in the CB industry	12 years

A4	Male	93%
	Female	7%

A5	18-35 years	5%
	36-55 years	53%
	56+ years	42%

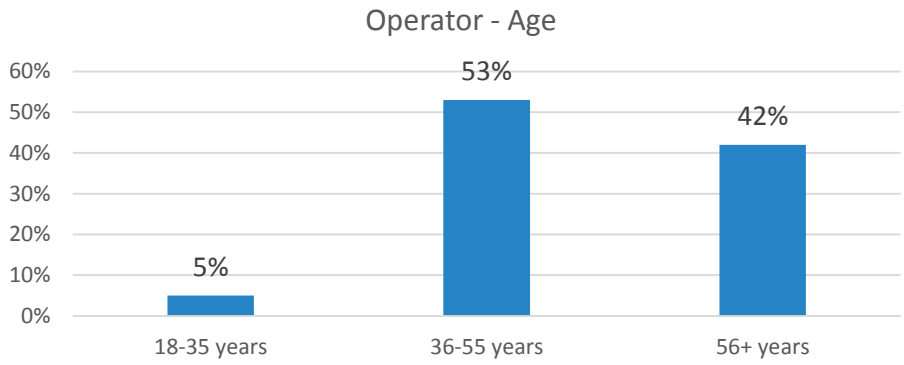
A6	Non-ATSI	99%
	ATSI	1%

A7	Tertiary education	38%
	Trade certificate or apprenticeship	14%
	Secondary school	46%
	Primary school	2%

A8	Not undertaking education	98%
	Currently undertaking education	2%

17 years Average years worked in the charter boat industry

12 years Average years owned a charter boat licence



Demographics – Overall Cont'd

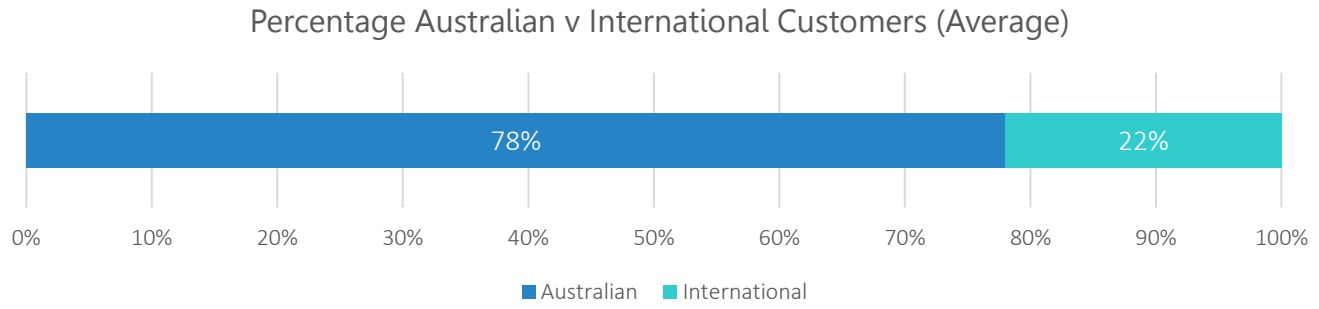
A15 (Average)	Australian customers	78%
	International customers	22%

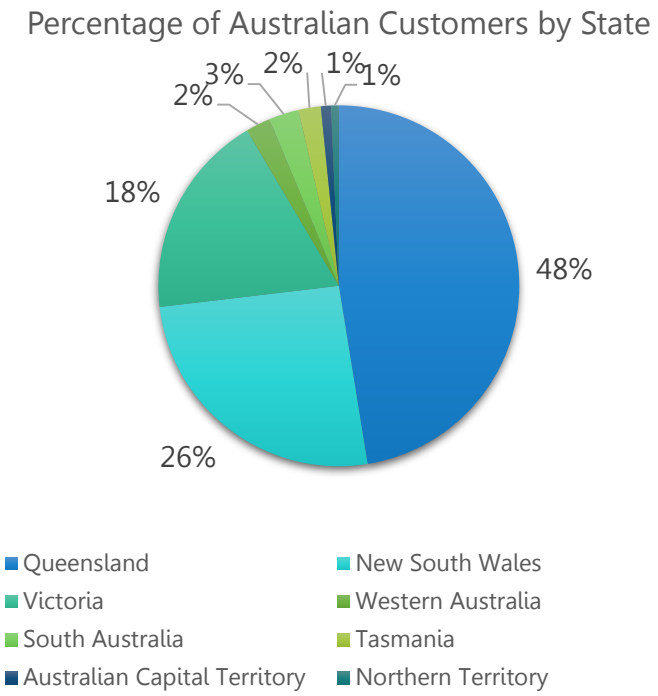
A16 (Average)	Queensland	48%
	New South Wales	26%
	Victoria	18%
	Western Australia	2%
	South Australia	3%
	Tasmania	2%
	Australian Capital Territory	1%
	Northern Territory	1%

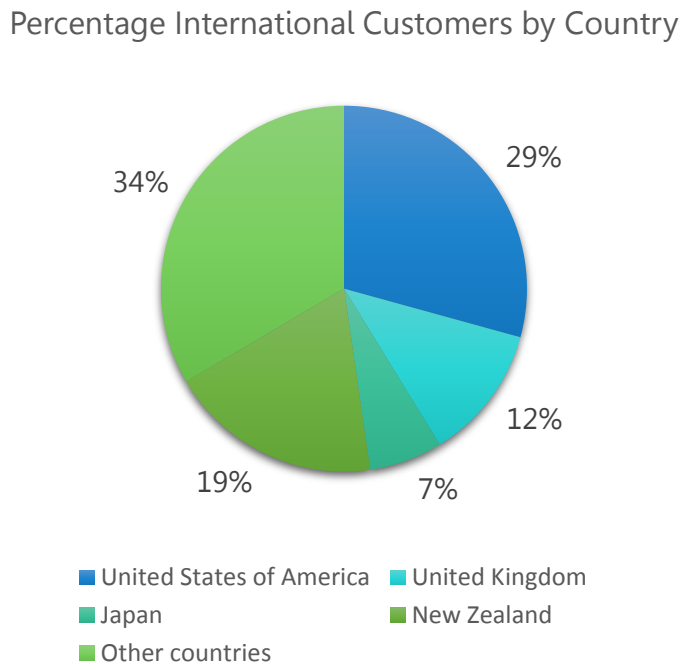
Base	Has International Clients (n=83, 83% of sample)	
A17 (Average)	United States of America	29%
	United Kingdom	12%
	Japan	7%
	New Zealand	19%
	Other countries*	34%

*Note, other important countries mentioned included:

- China (36% of other mentions, or approximately 12% of total international clients).
- Germany (22% of other mentions, or approximately 7% of total international clients).
- South Africa (14% of other mentions, or approximately 5% of total international clients).







Demographics – Overall Cont'd

A19	Repeat Customers	55%
	First time customers	45%

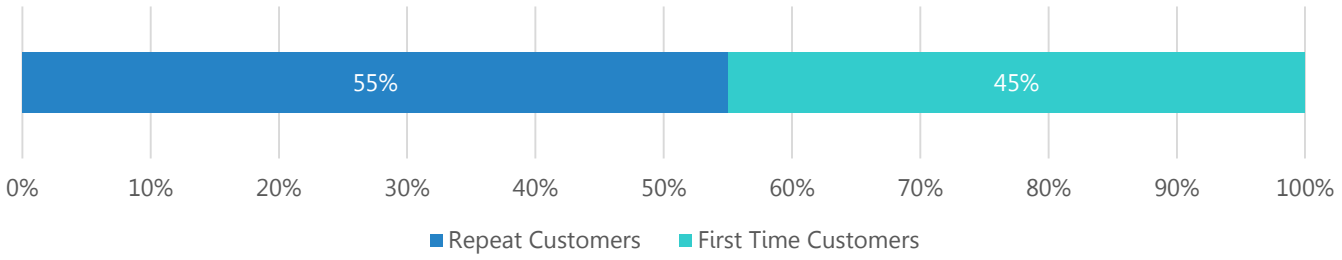
A20	Day trips (Less than 24 hour trips, includes day trips, evening and into the night trips)	68%
	Multi-day trips / live aboard (Trips more than 24 hours)	32%

A21	Game fishing	18%
	Sports fishing	26%
	Coral reef	22%
	Rocky reef	17%
	Inshore (estuary, rivers, freshwater, impoundments)	18%

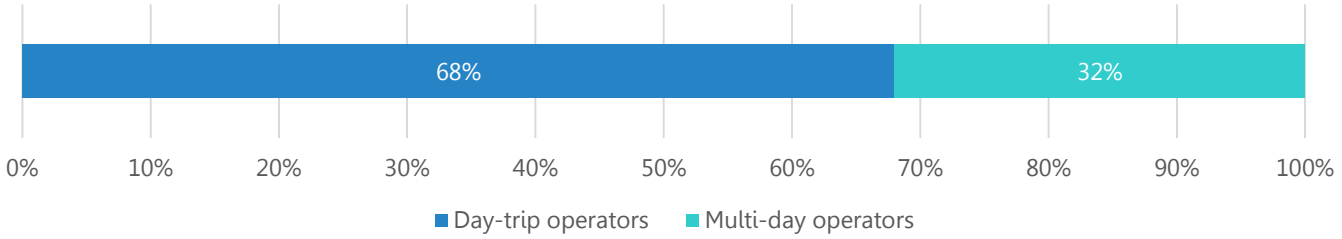
A22	Harvest fishing (for consumption)	45%
	Sports fishing (mostly released)	55%

A23	Bag out - Average	27%

Percentage Repeat business vs First time Customers (Average)



Percentage Day-trip operators vs Multi-day operators



Sports Fishing

Number 1 most frequently ranked fishing type undertaken by charter fishing operator.

55%

Total percentage of operators who mainly undertake sports fishing.

27%

Average percentage of clients that want to bag out.

Demographics – Business Model

		Game Fishing	Sports Fishing	Coral Reef	Rocky Reef	Inshore
A1	Average Number of Years Worked in CB industry	22 years	18 years	16 years	14 years	13 years
A2	Average Number of Years Owned a Licence in the CB industry	16 years	12 years	11 years	11 years	12 years
A4 (Gender)	Male	97%	92%	87%	91%	96%
	Female	3%	8%	13%	9%	4%
A5 (Age)	18-35 years	3%	6%	3%	5%	12%
	36-55 years	57%	56%	53%	36%	62%
	56+ years	40%	38%	45%	59%	27%
A6 (Indigenous)	Non-ATSI	100%	98%	100%	100%	96%
	ATSI	0%	2%	0%	0%	4%
A7 (Education)	Tertiary Education	49%	42%	37%	32%	31%
	Trade certificate / apprenticeship	14%	10%	16%	18%	15%
	Secondary school	34%	46%	44%	50%	54%
	Primary school	3%	2%	3%	0%	0%
A8	Not undertaking education	100%	98%	97%	95%	96%
	Currently undertaking education	0%	2%	3%	5%	4%

Game Fishing businesses have been in the industry longer, and have held a charter fishing licence longer than other business models. Those running Game Fishing businesses also tend to be more highly educated than those that run other business models.

Rocky Reef businesses tend to be an older profile, with 59% aged 56+ years.

Those operating Rocky Reef and Inshore businesses are more likely to have not completed tertiary education.

All businesses are mostly operated by Males, non-Aboriginal or Torres Strait Islanders, and most are not undertaking any further education.

Demographics – Business Model Cont'd

		Game Fishing	Sports Fishing	Coral Reef	Rocky Reef	Inshore
A9 (Source of Income)	Charter Fishing	66%	73%	55%	45%	73%
	Other Source	34%	27%	45%	55%	27%
A10 (Work in other job/ industry)	Yes	49%	35%	50%	59%	46%
	No	51%	65%	50%	41%	54%
A11 (% of business time)	Charter fishing	64%	80%	64%	63%	74%
	Non-charter fishing paid work	31%	17%	32%	36%	22%
	Study/education time	0%	0%	0%	0%	0%
	Other	5%	3%	4%	1%	4%
A15 (Average)	Australian Customers	71%	72%	88%	87%	89%
	International Customers	29%	28%	12%	13%	11%
A16 (Average)	Queensland	45%	43%	58%	53%	40%
	New South Wales	29%	28%	23%	22%	24%
	Victoria	19%	21%	12%	14%	25%
	Other Australia	7%	8%	7%	11%	11%
A17 (Average)	United States of America	41%	36%	19%	16%	25%
	New Zealand	17%	17%	21%	15%	22%
	United Kingdom	11%	12%	14%	12%	14%
	Japan	10%	5%	6%	10%	6%
	Other Countries	21%	30%	40%	47%	33%

Charter Fishing is the primary source of income for all business models, apart from Rocky Reef businesses.

Those operating Sports Fishing businesses are more likely to consider this to be their primary and only source of income.

Game Fishing and Sports Fishing businesses have a higher proportion of international customers than other business models. The international customers tend to come from USA, New Zealand and the UK.

Coral Reef, and Rocky Reef businesses tend to have a higher proportion of Australian customers (mainly from QLD and NSW).

Inshore businesses also have a higher proportion of Australian customers from QLD and NSW, and also from VIC.

Demographics – Business Model Cont'd

		Game Fishing	Sports Fishing	Coral Reef	Rocky Reef	Inshore
A19 (Customer Type)	Repeat Customers	60%	54%	56%	47%	46%
	First Time Customers	40%	46%	44%	53%	54%
A20 (Trip Type)	Day Trips	51%	69%	66%	77%	85%
	Multi-Day Trips / Live Aboard	49%	31%	34%	23%	15%
A21 (Business Model – 1st and 2nd Rank)	Game Fishing	100%	31%	11%	5%	0%
	Sports Fishing	51%	100%	16%	9%	23%
	Coral Reef	29%	6%	100%	27%	0%
	Rocky Reef	11%	4%	8%	100%	4%
	Inshore	3%	15%	3%	9%	100%
A22 (Fishing Type)	Harvest Fishing	37%	27%	76%	82%	23%
	Sports Fishing	63%	73%	24%	18%	77%
A23 (Average)	Percentage of Customers Wanting to Bag Out	24%	17%	39%	43%	14%

Game Fishing, Sports Fishing and Coral Reef businesses are more reliant on repeat customers, whereas the majority of Rocky Reef and Inshore customers are first time customers.

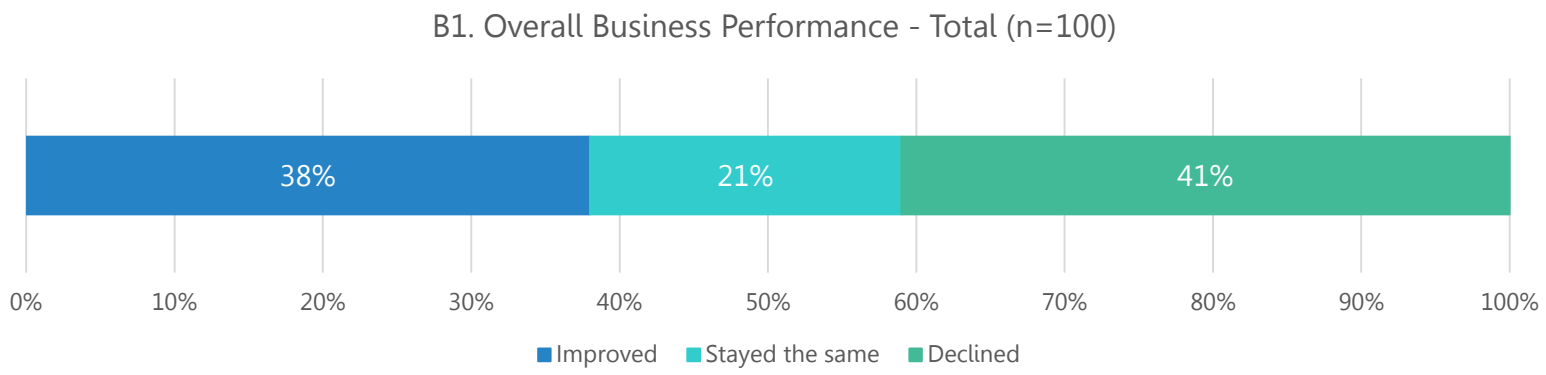
Approximately two-thirds of Sports Fishing, Coral Reef and Rocky Reef trips are Day Trips. Inshore trips are more likely to be Day Trips (85%), whereas Game Fishing trips are less likely to be Day Trips (51%).

Approximately a half of Game Fishing businesses offer Sports Fishing, and a third offer Coral Reef fishing. A third of Sports Fishing businesses also offer Game Fishing. Approximately a quarter of Rocky Reef businesses also offer Coral Reef fishing.

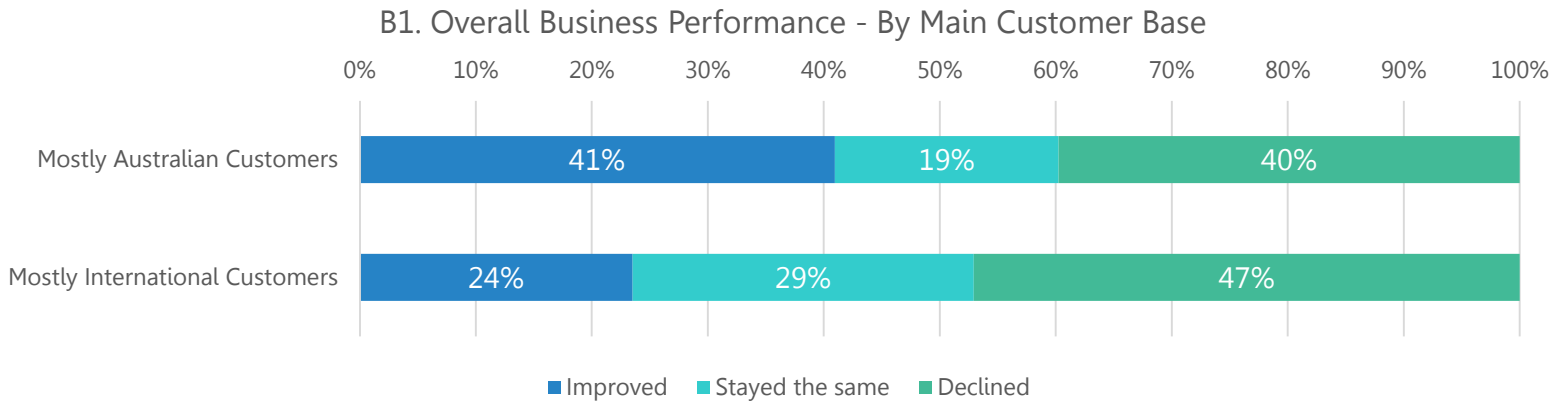
Coral Reef and Rocky Reef businesses tend to undertake harvest fishing, whereas the other business models tend to undertake sports fishing.

Coral Reef and Rocky Reef businesses have a higher proportion of clients wanting to bag out.

Business Confidence – Past 12 months



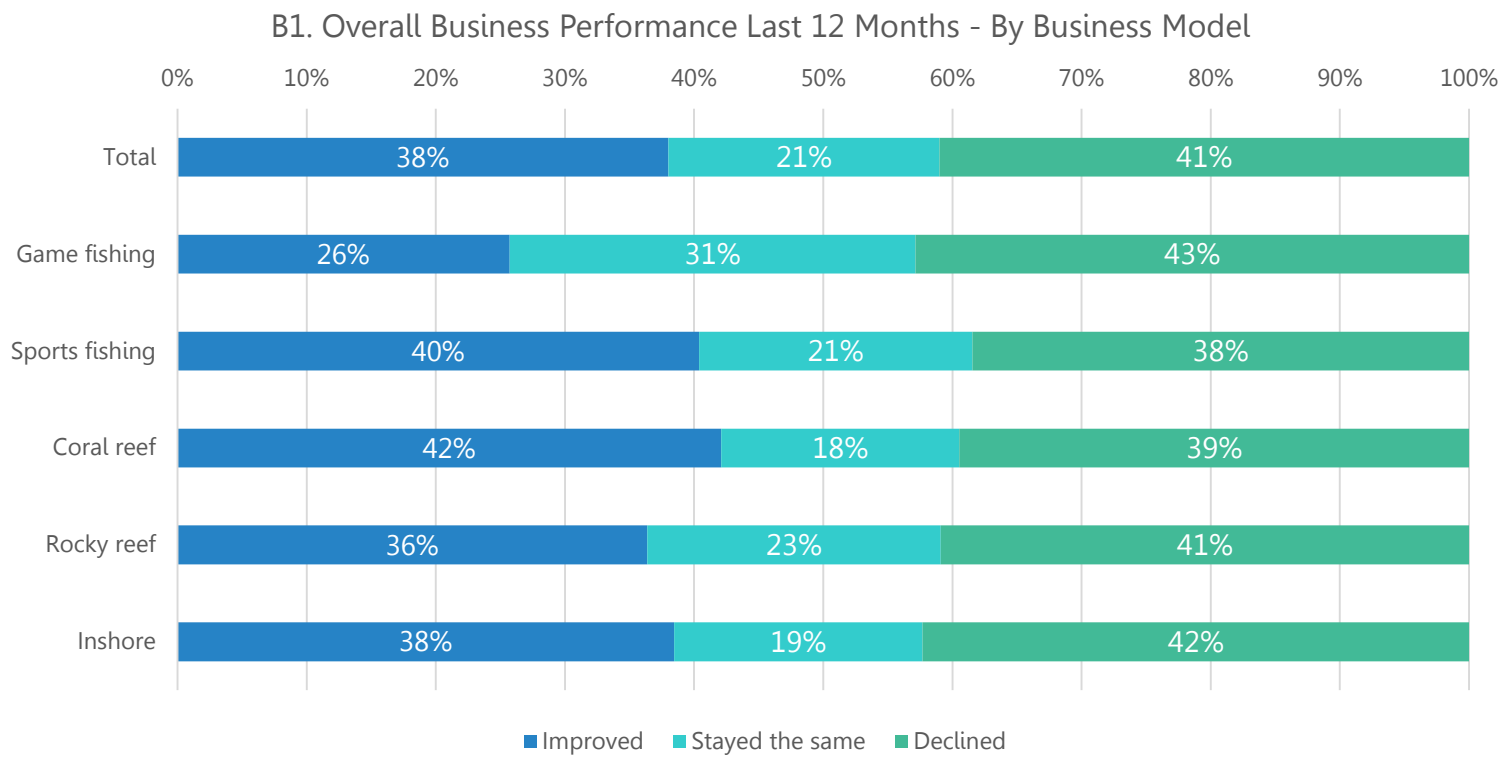
Over the last 12 months, charter boat operators mostly feel that their business performance has declined (41%) or stayed the same (21%). Only 38% of all operators interviewed felt that their business performance had improved.



For those operators who have mostly Australian customers, a higher proportion feel that their business has improved (41%) while those who have mostly International customers have a higher proportion of operators who feel there business has declined (47%).

B1. Over the last 12 months, how would you rate your overall business performance? Asked on a 0-10 scale, 0 means 'declined a great deal' 5 means 'stayed the same' and 10 means 'improved a great deal'.
Asked of all licence holders (n=100), Improved are those who scored 6, 7, 8, 9 or 10, Stayed the same are those who scored a 5, and Declined are those that scored a 0, 1, 2, 3, or 4.

Business Confidence – Past 12 months (cont'd)

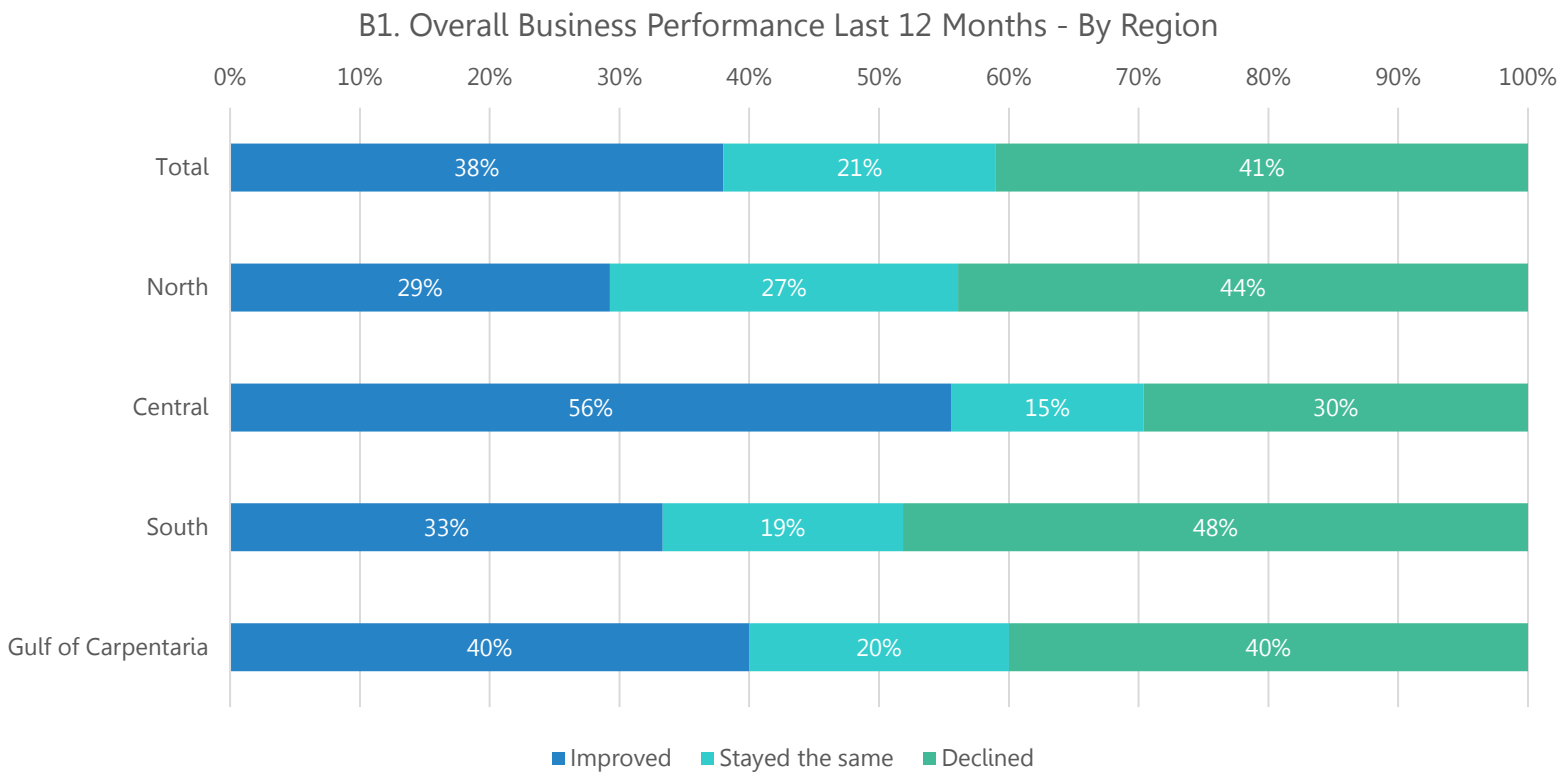


For Game Fishing businesses, there is a lower proportion of those who feel their business has improved over the last 12 months compared with all other business models.

All other business models mirror the overall result, with approximately a fifth indicating their business has stayed the same, two-fifths indicating their business has improved and two-fifths indicating their business has declined over the last 12 months.

B1. Over the last 12 months, how would you rate your overall business performance? Asked on a 0-10 scale, 0 means 'declined a great deal' 5 means 'stayed the same' and 10 means 'improved a great deal'.
Asked of all licence holders (n=100), Improved are those who scored 6, 7, 8, 9 or 10, Stayed the same are those who scored a 5, and Declined are those that scored a 0, 1, 2, 3, or 4.

Business Confidence – Past 12 months (cont'd)



For businesses operating in the Central region, the majority have indicated their businesses have improved over the last 12 months, however businesses within the North and South regions have had declining performance.

B1. Over the last 12 months, how would you rate your overall business performance? Asked on a 0-10 scale, 0 means 'declined a great deal' 5 means 'stayed the same' and 10 means 'improved a great deal'.
Asked of all licence holders (n=100), Improved are those who scored 6, 7, 8, 9 or 10, Stayed the same are those who scored a 5, and Declined are those that scored a 0, 1, 2, 3, or 4.

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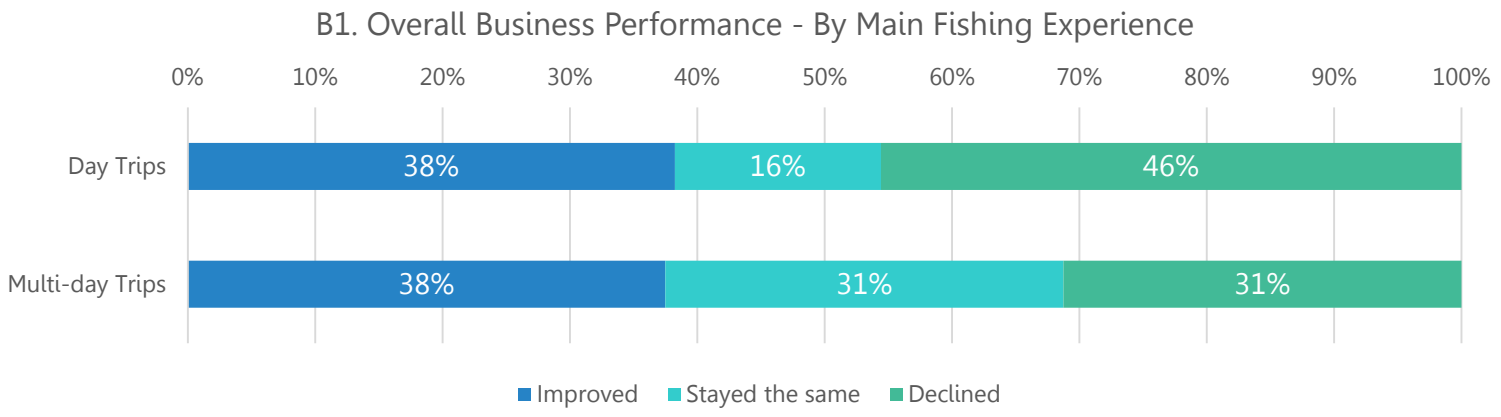
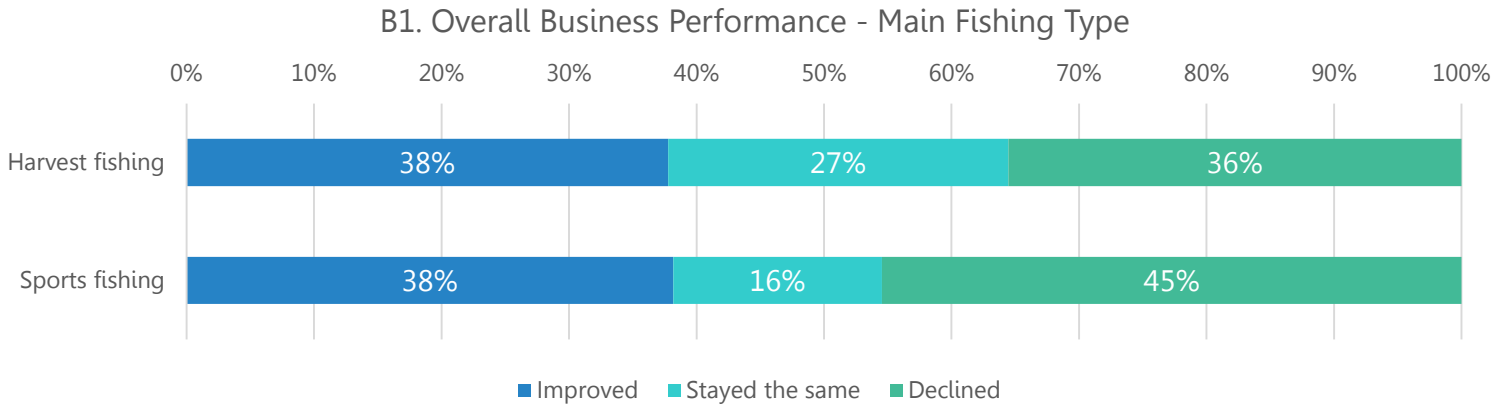


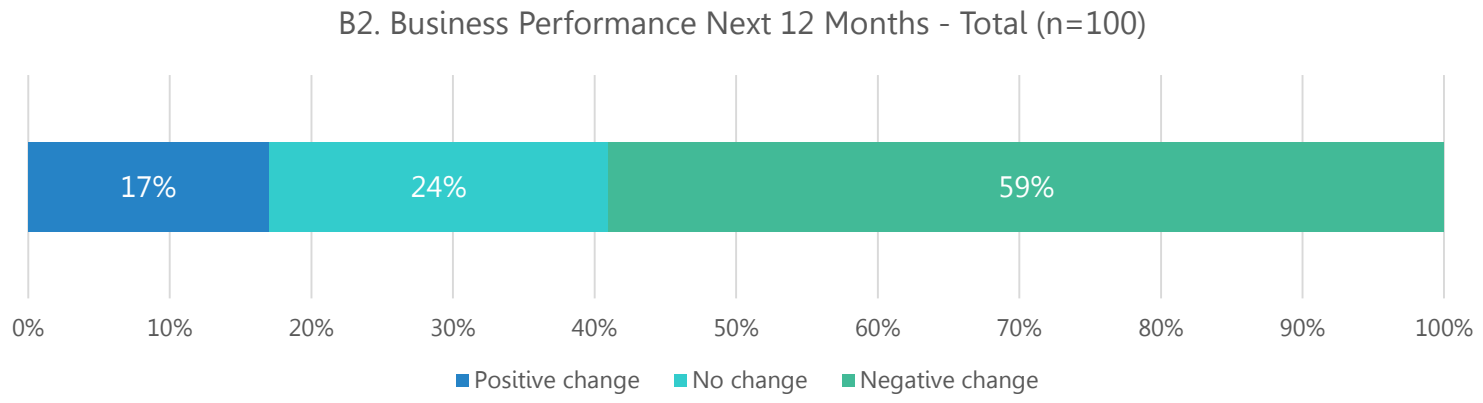
For those operators who mostly undertake day trips, there is a higher proportion of those who feel their business has declined over the last 12 months compared with those operators who mostly undertake multi-day trips (46% compared with 31% respectively).

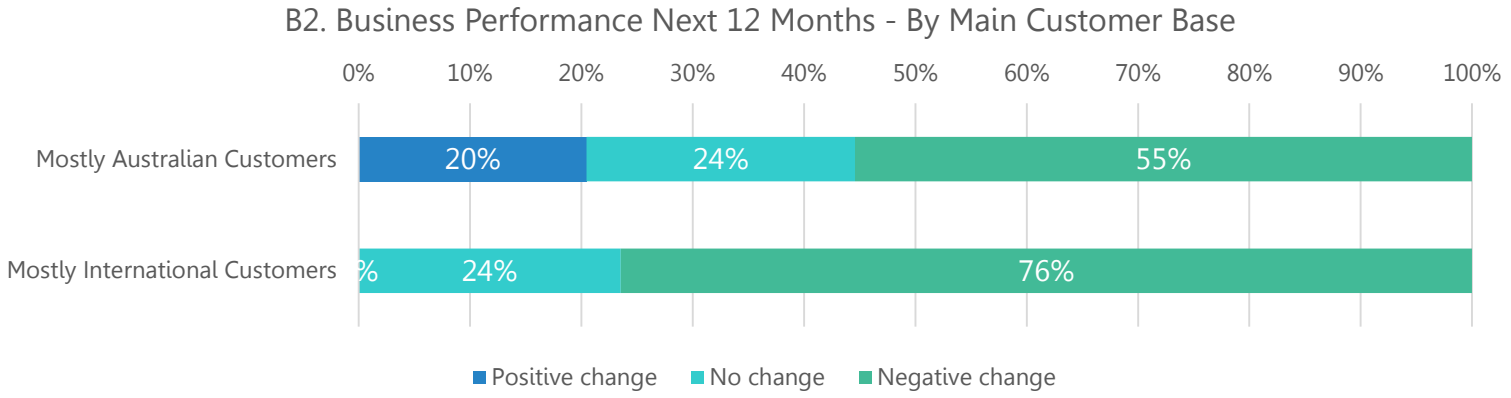


And for those operators who mostly undertake harvest fishing, there is a lower proportion of those who feel their business has declined over the last 12 months compared with those operators who mostly undertake sports fishing (36% compared with 45% respectively).

B1. Over the last 12 months, how would you rate your overall business performance? Asked on a 0-10 scale, 0 means 'declined a great deal' 5 means 'stayed the same' and 10 means 'improved a great deal'.
Asked of all licence holders (n=100), Improved are those who scored 6, 7, 8, 9 or 10, Stayed the same are those who scored a 5, and Declined are those that scored a 0, 1, 2, 3, or 4.

Business Confidence – Next 12 months



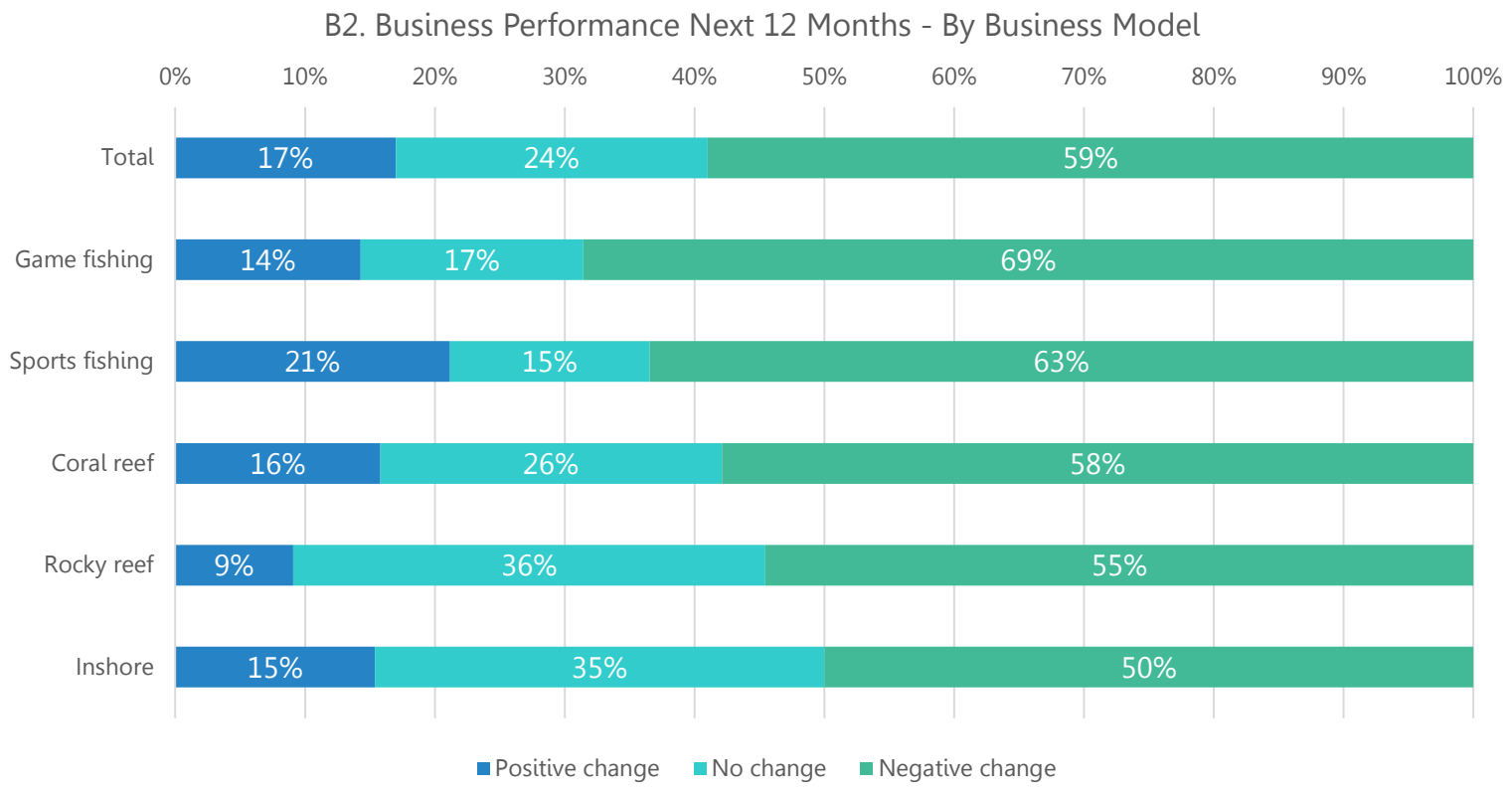


In the next 12 months, operators mostly believe there will be a significant negative change to their business performance (59%), while just under a quarter (25%) believe there will be no change and only 17% believe there will be a positive change.

For those operators who have mostly Australian customers, a slightly lower proportion feel that their business will have a negative change in the next 12 months (55%), while those who have mostly international customers mostly perceive—understandably while COVID-19 travel restrictions are still in place—that there will be a significant negative change to their business performance in the next 12 months (76%).

B2. How likely is it that there will be a significant positive or negative change in the performance of your business in the next 12 months? A 0-10 scale, 0 means 'significant negative change' and 10 means 'significant positive change'.
Asked of all licence holders (n=100), Positive Change are those who scored a 6, 7, 8, 9 or 10, No Change are those who scored a 5, and Negative Change a 0, 1, 2, 3, or 4.

Business Confidence – Next 12 months (cont'd)



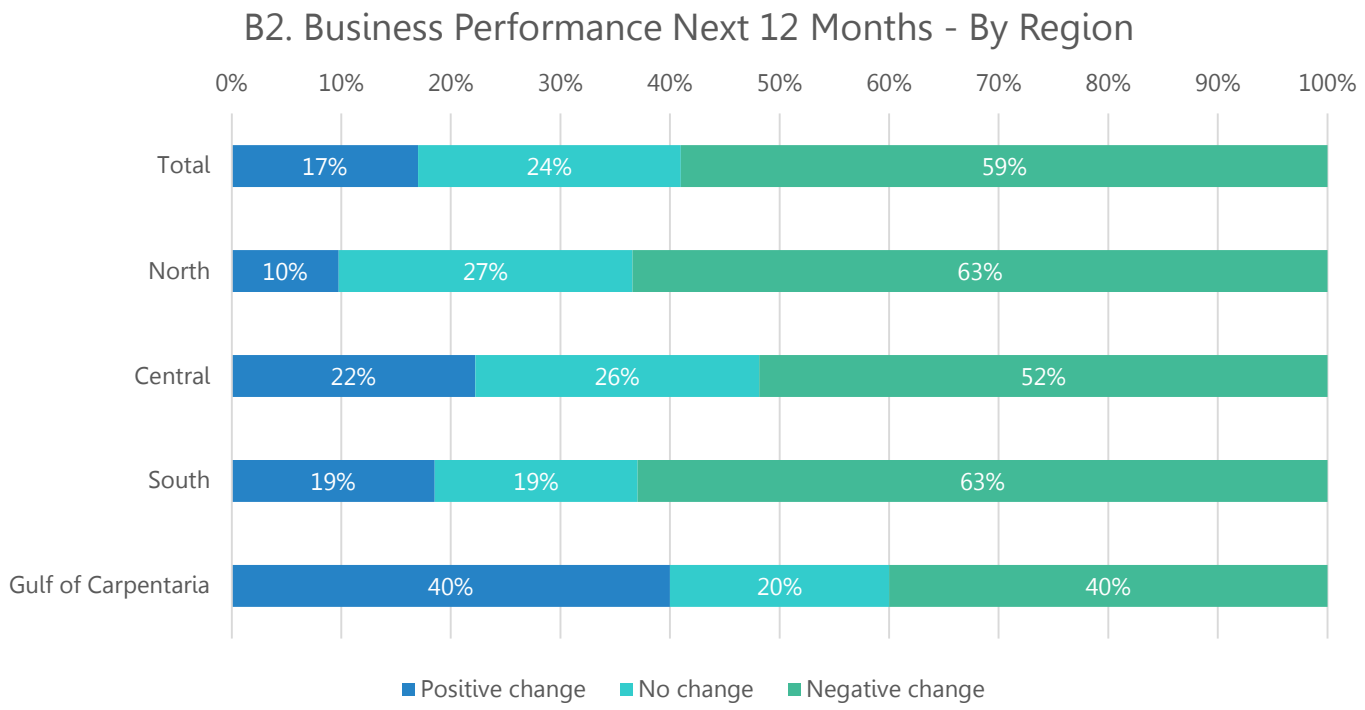
All business models indicate there will more likely be a negative change in their business across the next 12 months.

Approximately two-thirds of Game Fishing and Sports Fishing businesses indicate there will be negative change in their businesses.

Approximately half of Coral Reef, Rocky Reef and Inshore businesses indicated there will be a negative change in their businesses.

B2. How likely is it that there will be a significant positive or negative change in the performance of your business in the next 12 months? A 0-10 scale, 0 means 'significant negative change' and 10 means 'significant positive change'.
Asked of all licence holders (n=100), Positive Change are those who scored a 6, 7, 8, 9 or 10, No Change are those who scored a 5, and Negative Change a 0, 1, 2, 3, or 4.

Business Confidence – Next 12 months (cont'd)

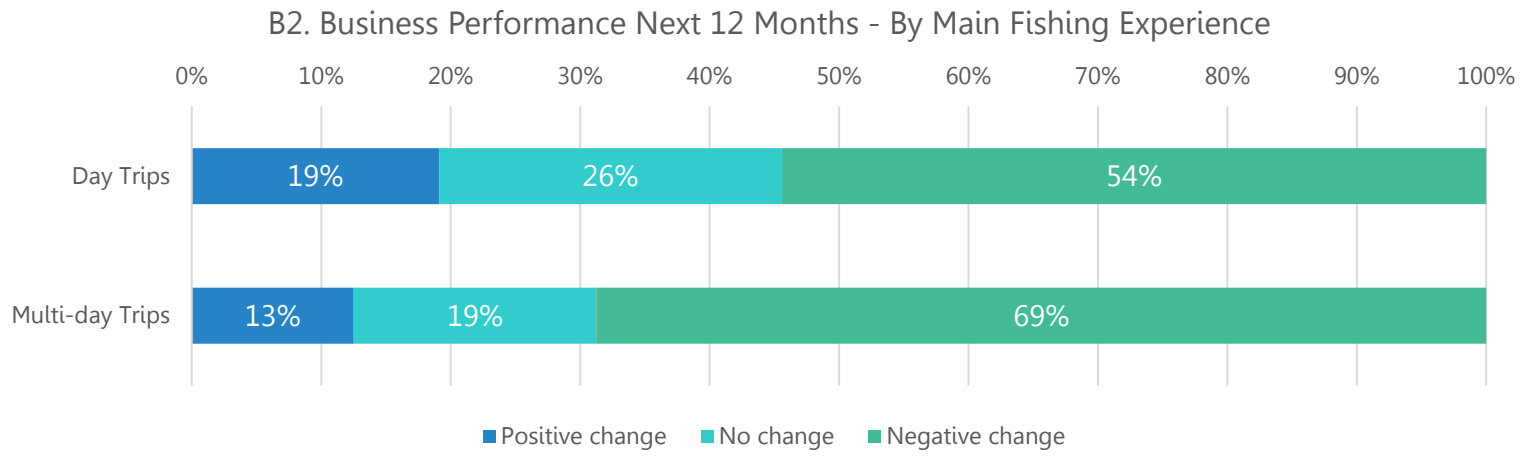


All regions indicate there will more likely be a negative change in their business across the next 12 months.

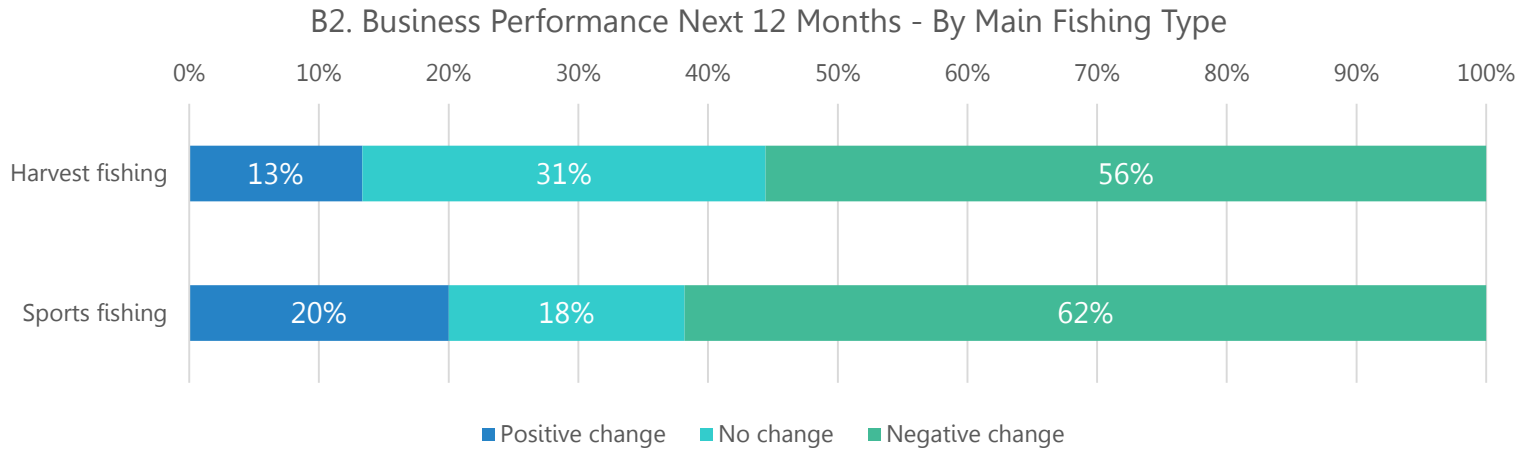
Those businesses located in the Central region are slightly more optimistic about the next 12 months, however there is still more than 50% who indicate there will be a negative change in their business performance.

B2. How likely is it that there will be a significant positive or negative change in the performance of your business in the next 12 months? A 0-10 scale, 0 means 'significant negative change' and 10 means 'significant positive change'.
Asked of all licence holders (n=100), Positive Change are those who scored a 6, 7, 8, 9 or 10, No Change are those who scored a 5, and Negative Change a 0, 1, 2, 3, or 4.

Business Confidence – Next 12 months (cont'd)



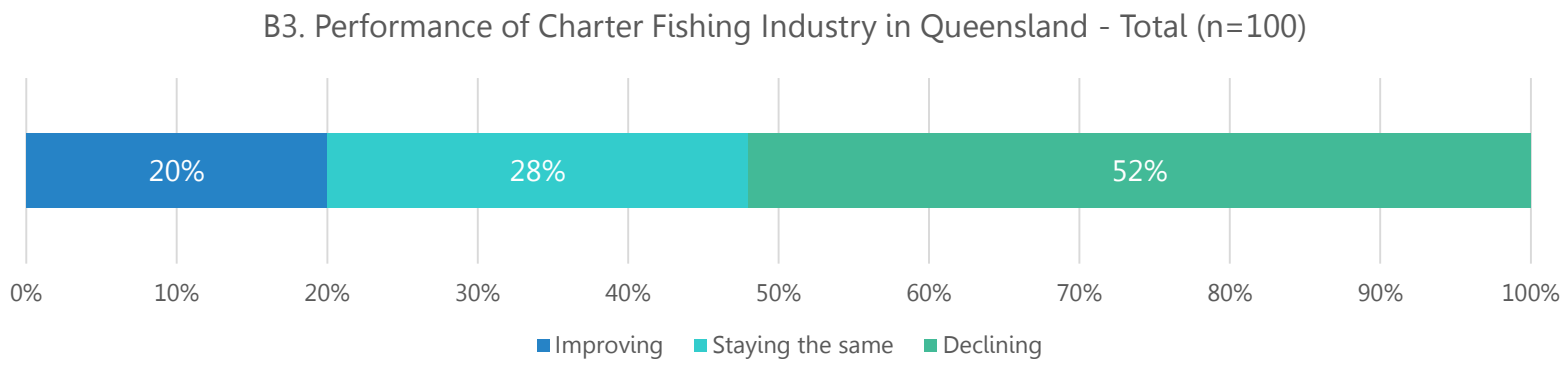
For those operators who mostly undertake day trips, there is a higher proportion of those who feel their business performance will have a positive change in the next 12 months (19%) compared with those operators who mostly undertake multi-day trips and mostly feel their business performance will have a negative change in the next 12 months (69%).



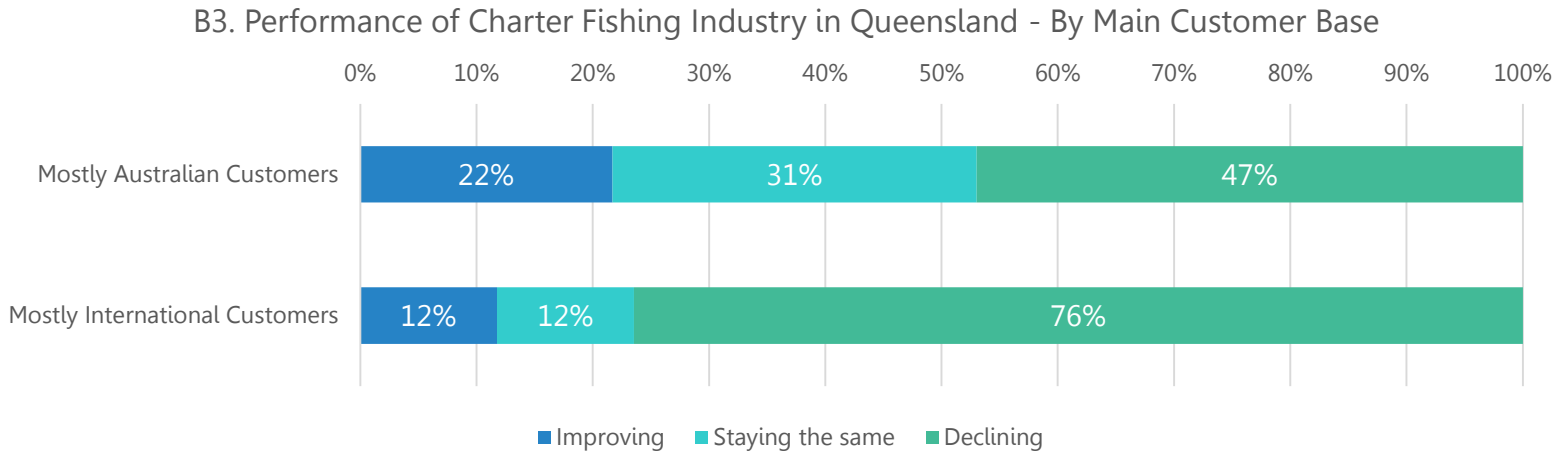
And for those operators who mostly undertake harvest fishing, there is a lower proportion of those who feel their business will have a positive change in the next 12 months compared with those operators who mostly undertake sports fishing (13% compared with 20% respectively).

B2. How likely is it that there will be a significant positive or negative change in the performance of your business in the next 12 months? A 0-10 scale, 0 means 'significant negative change' and 10 means 'significant positive change'.
Asked of all licence holders (n=100), Positive Change are those who scored a 6, 7, 8, 9 or 10, No Change are those who scored a 5, and Negative Change a 0, 1, 2, 3, or 4.

Business Confidence – Perceptions of industry as a whole



When asked to look at the performance of the Charter Boat Fishing Industry in Queensland overall, more than half of all operators surveyed believe the industry is declining (52%) and only 20% believe it is improving. Just under a third (28%) believe it isn't changing one way or another.

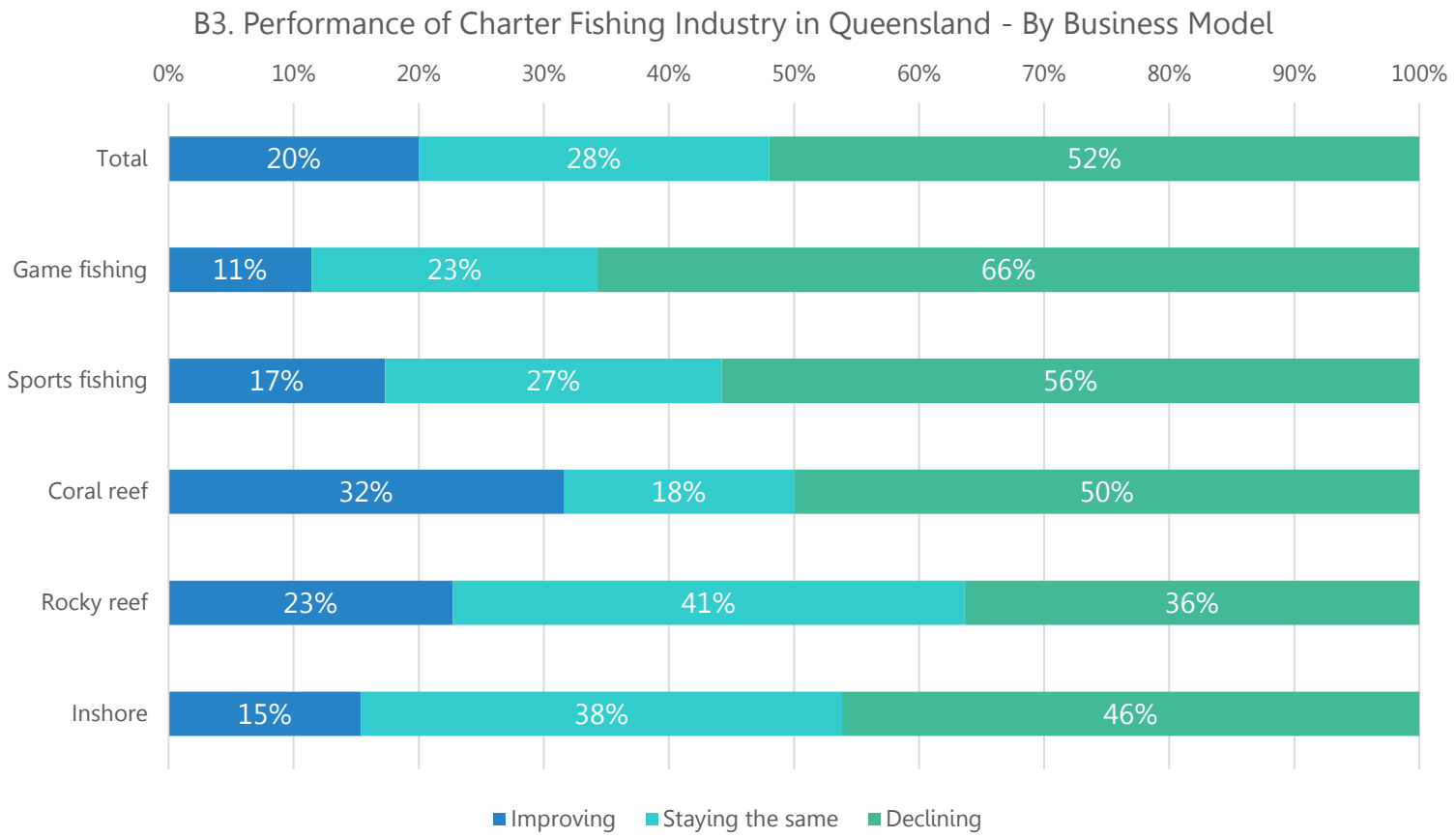


Those operators who take mostly Australian customers have a slightly higher perception that the industry is improving compared with those that take mostly International customers (22% compared with 12%).

Those that take mostly International customers have a significantly negative perception of the industry's business performance overall with 76% who perceive it is in decline.

B3. When you look at the performance of the Charter Boat Fishing Industry overall in Queensland, do you feel that it is improving, staying about the same, or declining? A 0-10 scale, 0 means 'Declining' and 10 means 'Improving'.
Asked of all licence holders (n=100), Improving are those who scored a 6, 7, 8, 9 or 10, Staying the same are those who scored a 5, and Declining a 0, 1, 2, 3, or 4.

Business Confidence – Perceptions of industry as a whole (cont'd)

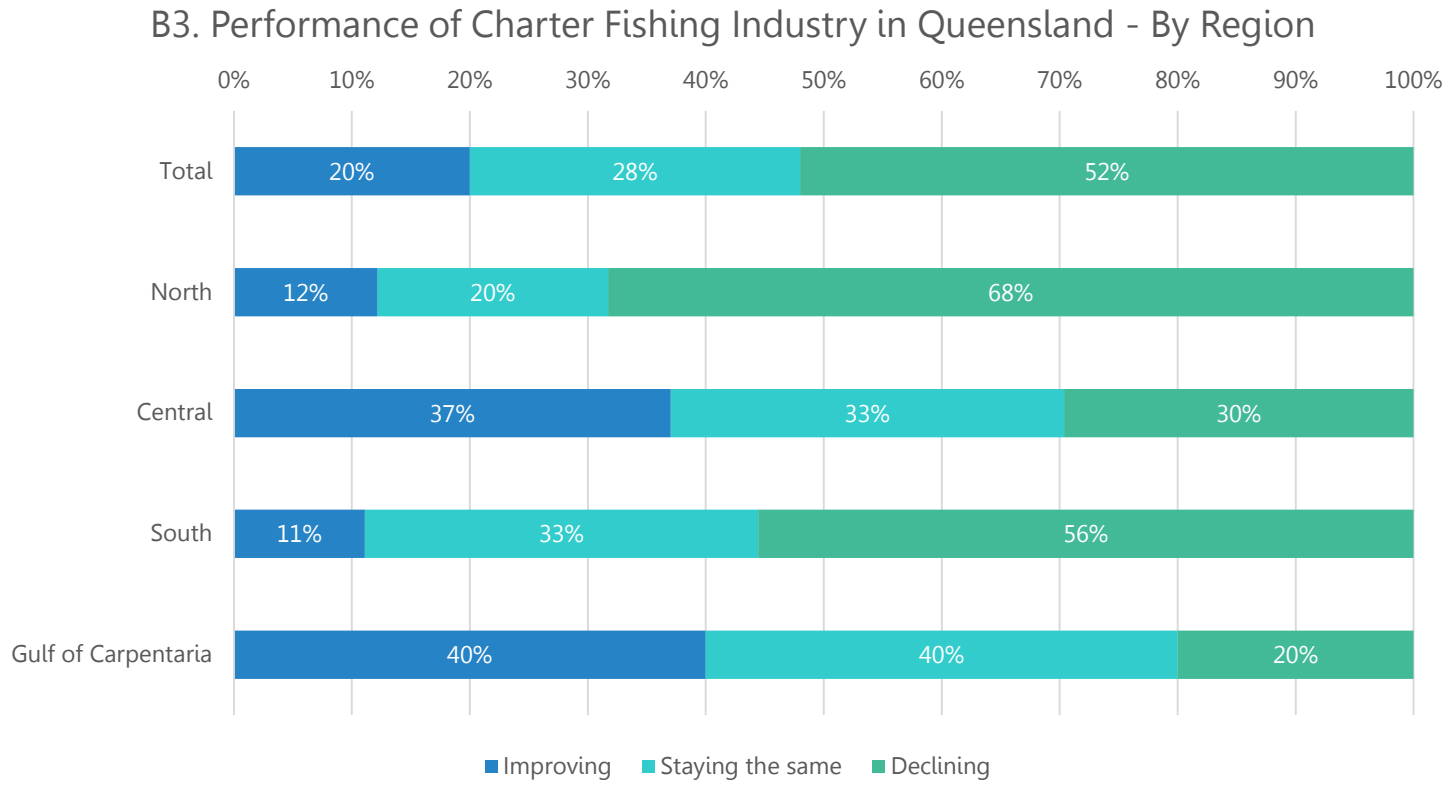


The majority of Game Fishing, Sports Fishing and Coral Reef businesses are more likely to perceive that the industry as a whole is in decline. Game Fishing businesses in particular are a cause for concern, with only 11% indicating the industry is improving, and 66% indicating the industry is in decline. However a third (32%) of Coral Reef businesses consider the industry is improving.

Rocky Reef businesses have the most positive perception of the industry, with only a third (36%) indicating the industry is in decline, 41% indicating the industry is staying the same, and 23% indicating the industry is improving.

B3. When you look at the performance of the Charter Boat Fishing Industry overall in Queensland, do you feel that it is improving, staying about the same, or declining? A 0-10 scale, 0 means 'Declining' and 10 means 'Improving'.
Asked of all licence holders (n=100), Improving are those who scored a 6, 7, 8, 9 or 10, Staying the same are those who scored a 5, and Declining a 0, 1, 2, 3, or 4.

Business Confidence – Perceptions of industry as a whole (cont'd)

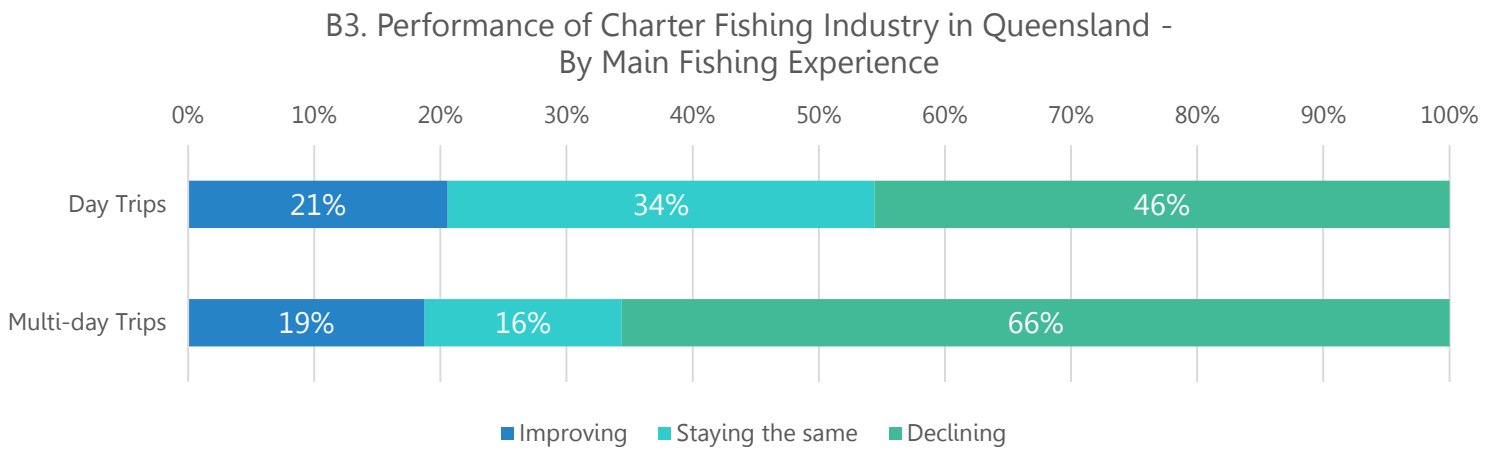


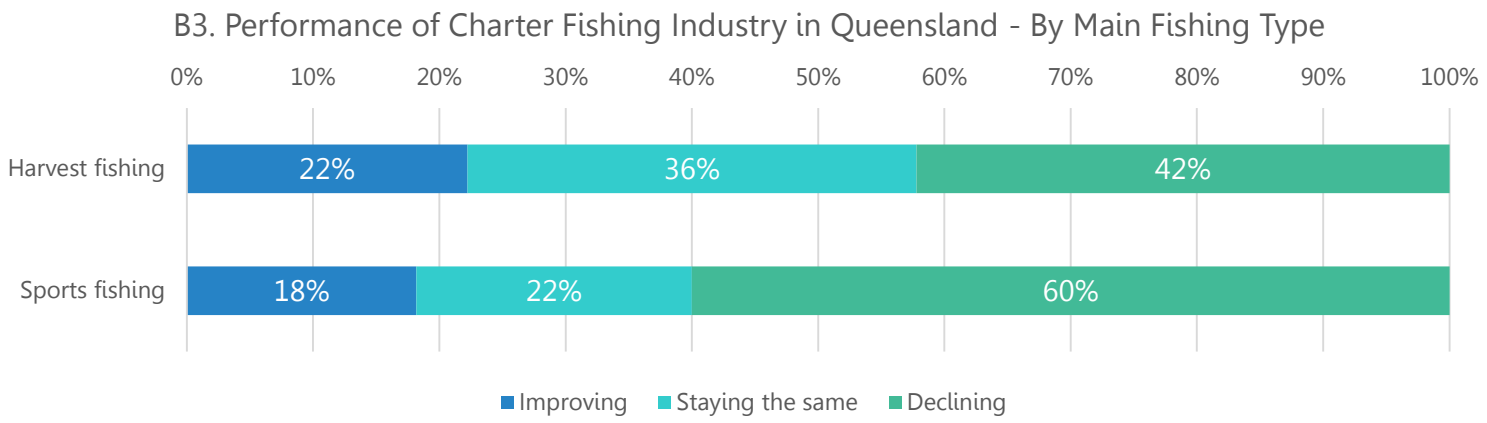
Business located in the Central region have the most positive perception of the industry with less than a third (30%) indicating the industry is in decline.

Businesses located in the North and South regions have a much more negative perception about the industry as a whole, with over two-thirds of North businesses and more than half of South businesses indicating the industry is in decline.

B3. When you look at the performance of the Charter Boat Fishing Industry overall in Queensland, do you feel that it is improving, staying about the same, or declining? A 0-10 scale, 0 means 'Declining' and 10 means 'Improving'.
Asked of all licence holders (n=100), Improving are those who scored a 6, 7, 8, 9 or 10, Staying the same are those who scored a 5, and Declining a 0, 1, 2, 3, or 4.

Business Confidence – Perceptions of industry as a whole (cont'd)



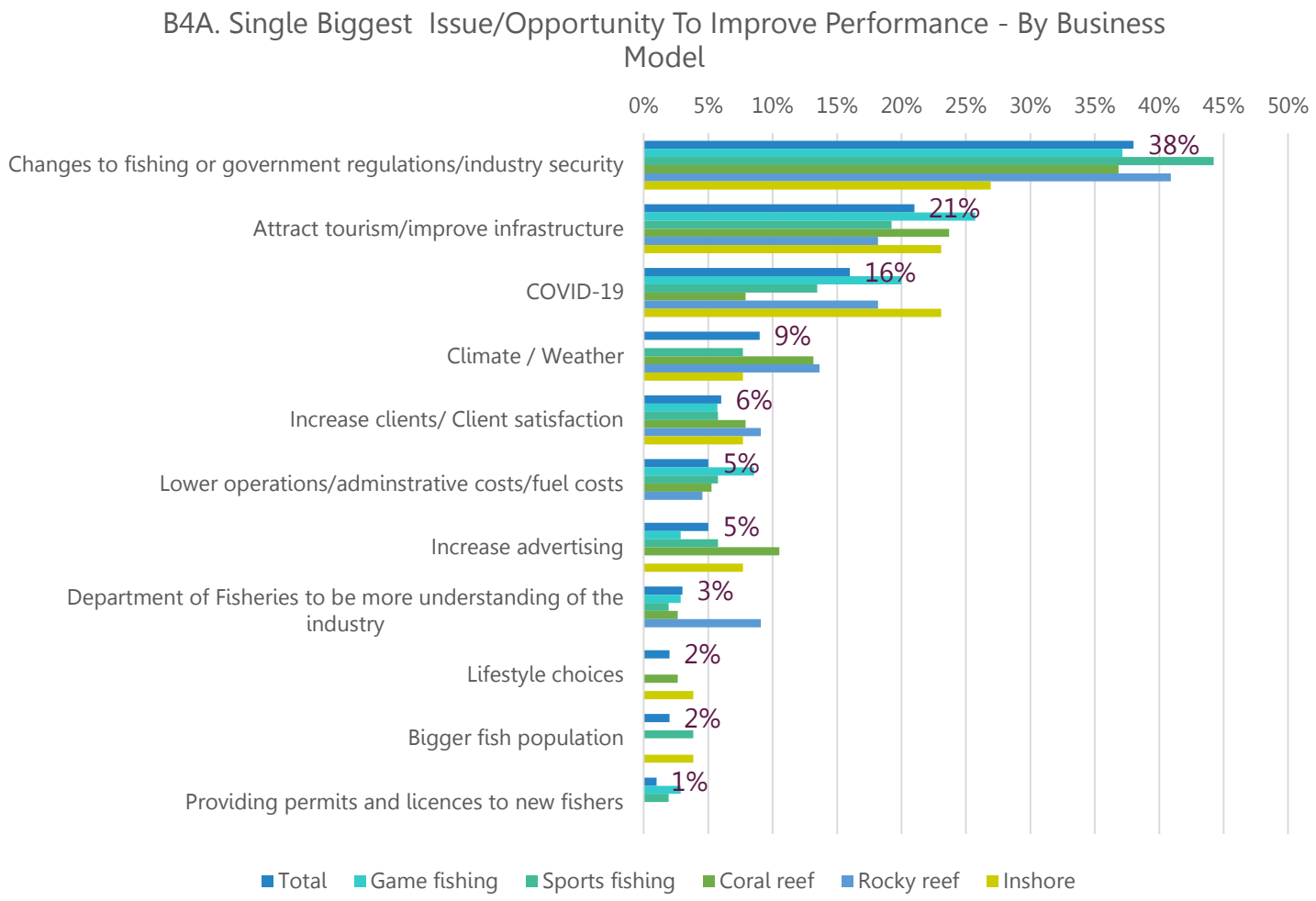


Those operators that mostly undertake day trips have a slightly high proportion of operators who perceive the overall industry is improving compared to those who mostly undertake multi-day trips (21% to 19% respectively). The majority of multi-day operators (66%) perceive the industry to be declining more than anything else.

The results are fairly similar when comparing those operators who undertake harvest fishing compared with those who undertake sports fishing, but a high proportion of harvest fishing operators perceive the industry to be staying the same overall (36%) and a higher proportion of sports fishing operators perceive the industry to be declining overall (60%).

B3. When you look at the performance of the Charter Boat Fishing Industry overall in Queensland, do you feel that it is improving, staying about the same, or declining? A 0-10 scale, 0 means 'Declining' and 10 means 'Improving'.
Asked of all licence holders (n=100), Improving are those who scored a 6, 7, 8, 9 or 10, Staying the same are those who scored a 5, and Declining a 0, 1, 2, 3, or 4.

Business Performance – Barriers by Total & Business Model

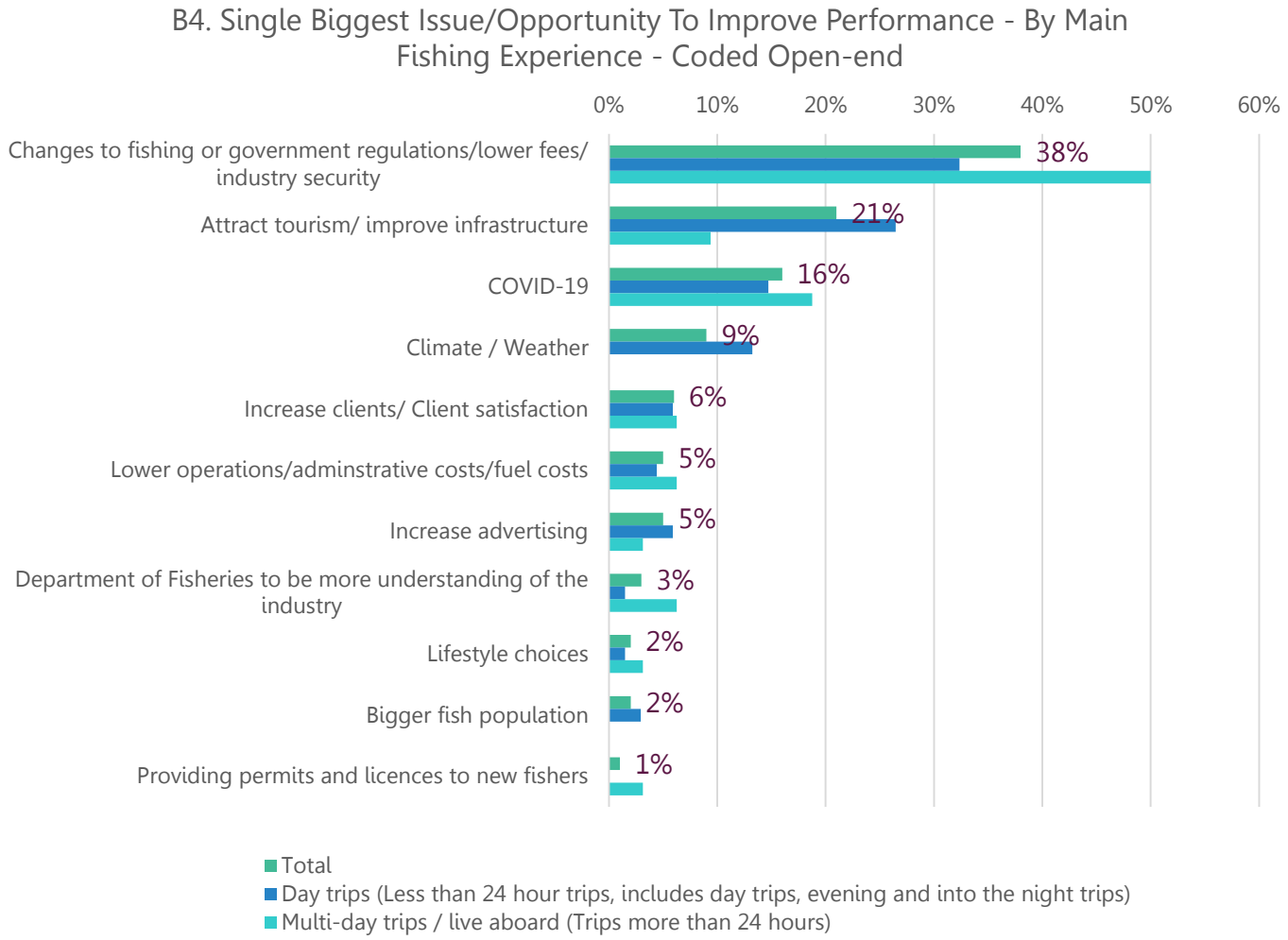


All business models perceive changes to fishing or government regulations to be the single biggest issue preventing them from improving their business performance (top mention for all).

Attracting tourism/improving infrastructure is second across all business models, where being able to get past COVID-19 is third for most, with climate/weather concerns of higher relevance to Coral Reef businesses.

B4. What are the key issues impacting on your business performance? What specific things could be improved that would have a positive impact on your business performance?
Asked of all licence holders (n=100)

Business Performance – Barriers by Total & Main Fishing Experience



The majority of operators perceive changes to fishing or government regulations to be the single biggest issue preventing them from improving their business performance (38%).

Opportunities to improve performance include attracting tourism/improving infrastructure (21%) and being able to get past COVID-19 (16%).

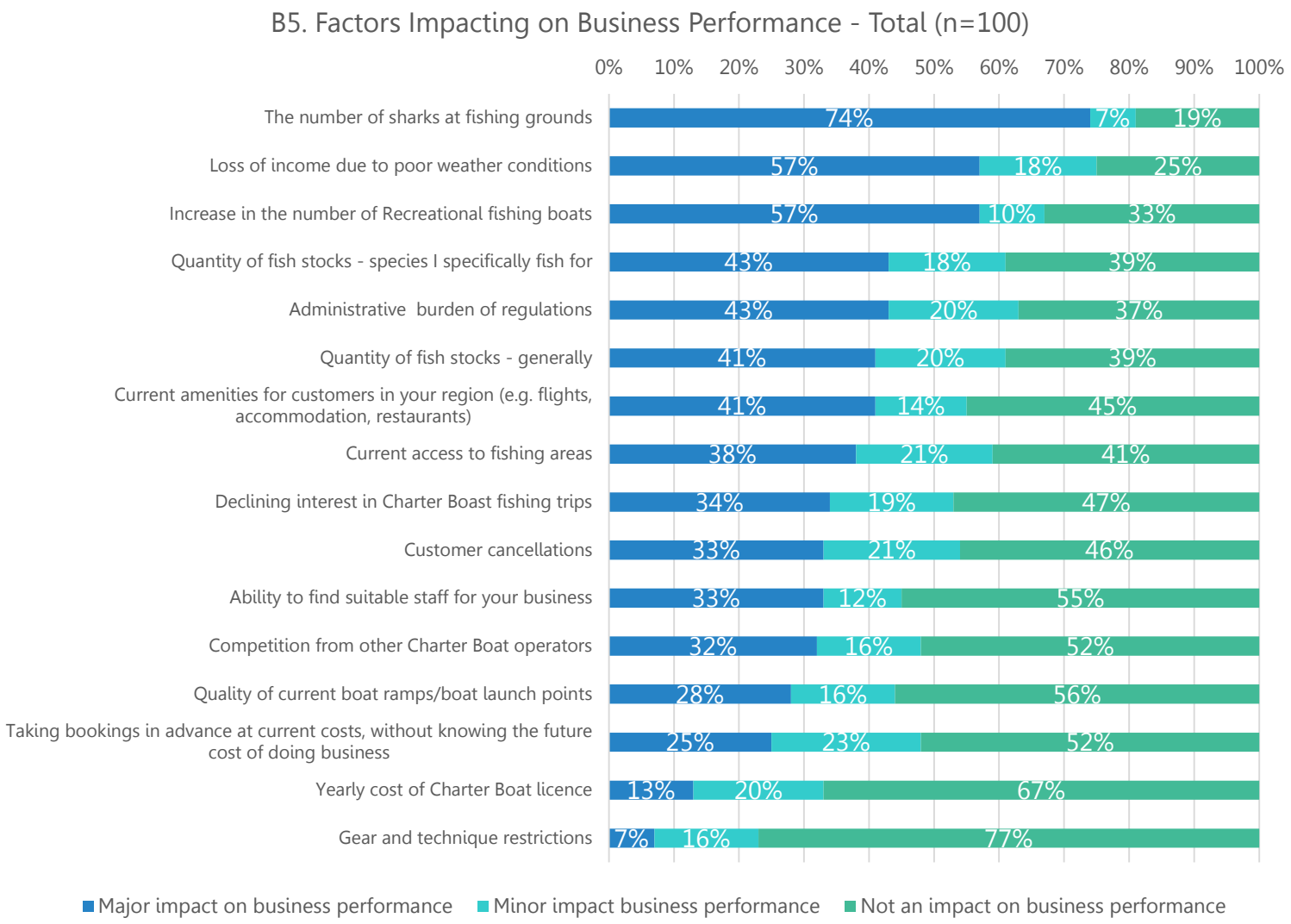
B4. What are the key issues impacting on your business performance? What specific things could be improved that would have a positive impact on your business performance?
Asked of all licence holders (n=100)

Business Performance – Barriers: Selected verbatim comments relating to top three barriers.

Changes to fishing or government regulations/ lower fees/ industry security	*Less red tape as it is currently too much and we are over-managed.*	*A better understanding of the charter fishing industry by Queensland Fisheries and GBRMPA and AMFA. A reduction in the imposition of unnecessary regulations and documentation by all related government agencies.*	*Australia is over-regulated with boat requirements and safety regulations and is one of the most expensive places in the world to operate a charter boat.*	*Streamlining rules and regulations between Queensland Fisheries, AMSA and Marine Parks so they have the same understanding of the areas that are classed as inshore. There's a grey area in that sort of thing to determine rules.*	*Increase the total number of allowable catch of sharks in the commercial sector.*
Attract tourism/ improve infrastructure	*More advertising to increase tourism to the area and for people to be prepared to spend more money.*	*We need tourism to come back with more visitors to North Queensland. International tourism has been constantly down for various reasons over the past few years. There needs to be a big focus on getting people back to North Queensland.*	*Cheaper direct flights into Townsville and Cairns.*	*Attract people to the area and encourage them to spend their money on fishing trips as there seems to be a decline in the interest of charter boat fishing.*	*More international direct flights into Cairns.*
COVID-19	*Coronavirus. We need to be in lock down and be able to run a fishing business with social distancing. No one can travel. Can't do tours.*	*The economic downside of the Coronavirus and what will happen following and how long it will be before everything returns to normal.*	*Tourism jobs due to Covid-19 and other world events like bushfires.*	*Covid-19. No interstate or international travellers period.*	*Coronavirus. We've lost a whole year.*

B4. What are the key issues impacting on your business performance? What specific things could be improved that would have a positive impact on your business performance?
Asked of all licence holders (n=100)

Business Performance – Barriers Cont'd by Total

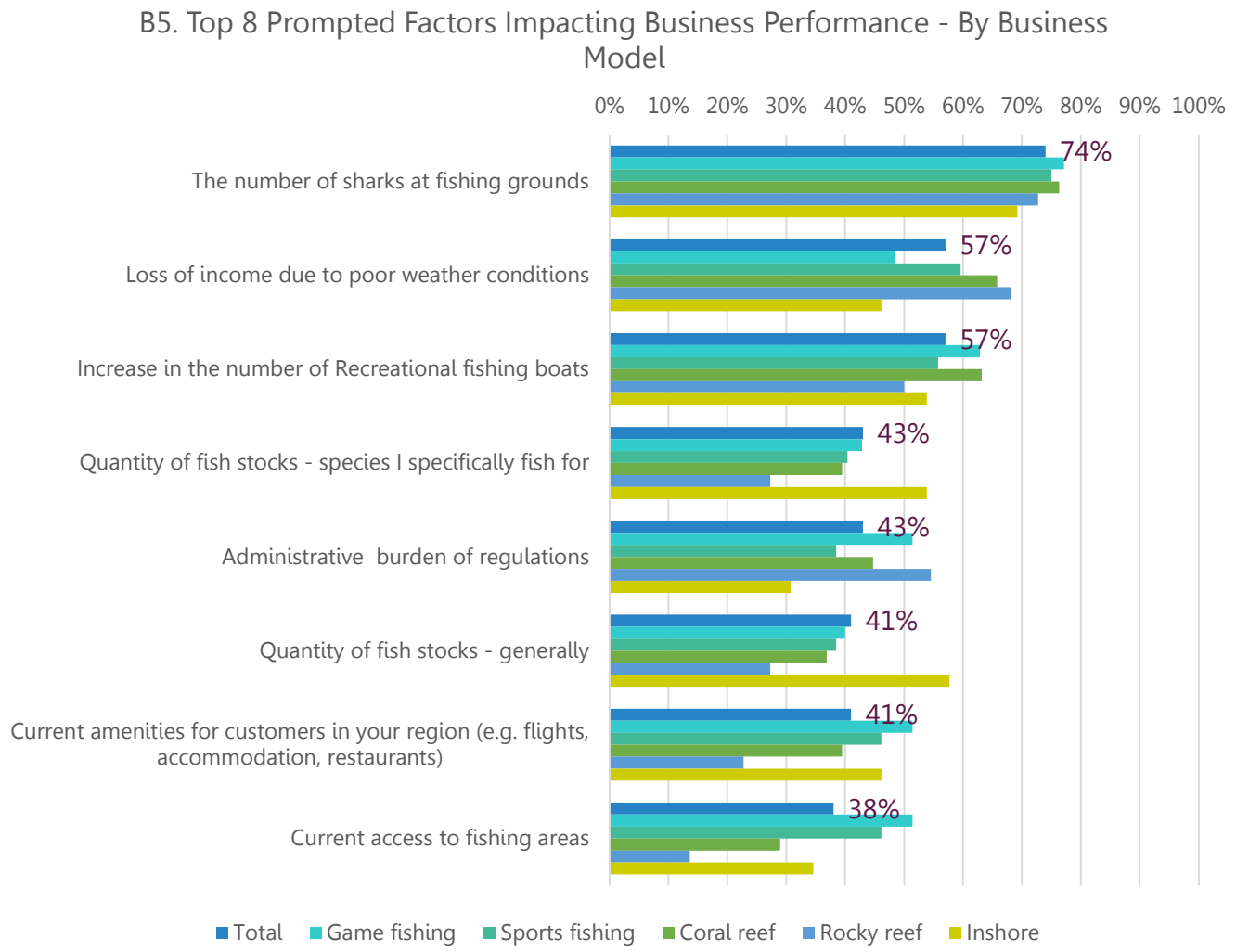


The number one factor impacting business performance for all operators relates to the number of sharks at fishing grounds (74% of all operators ranked this as a major factor impacting business performance).

Other major factors include loss of income due to poor weather conditions (57%) and increased recreational fishing boat usage (57%).

B5. Please rate each of the following possible factors impacting your business performance using a 0 to 10 scale where 0 means 'Not impacting my business performance at all' and 10 means 'A major impact on my business performance'
Asked of all licence holders (n=100), Major impact those rated 6, 7, 8, 9, or 10, Minor impact those who rated 5, Not an impact those who rated 0, 1, 2, 3, 4.

Business Performance – Barriers by Business Model (Top 8)

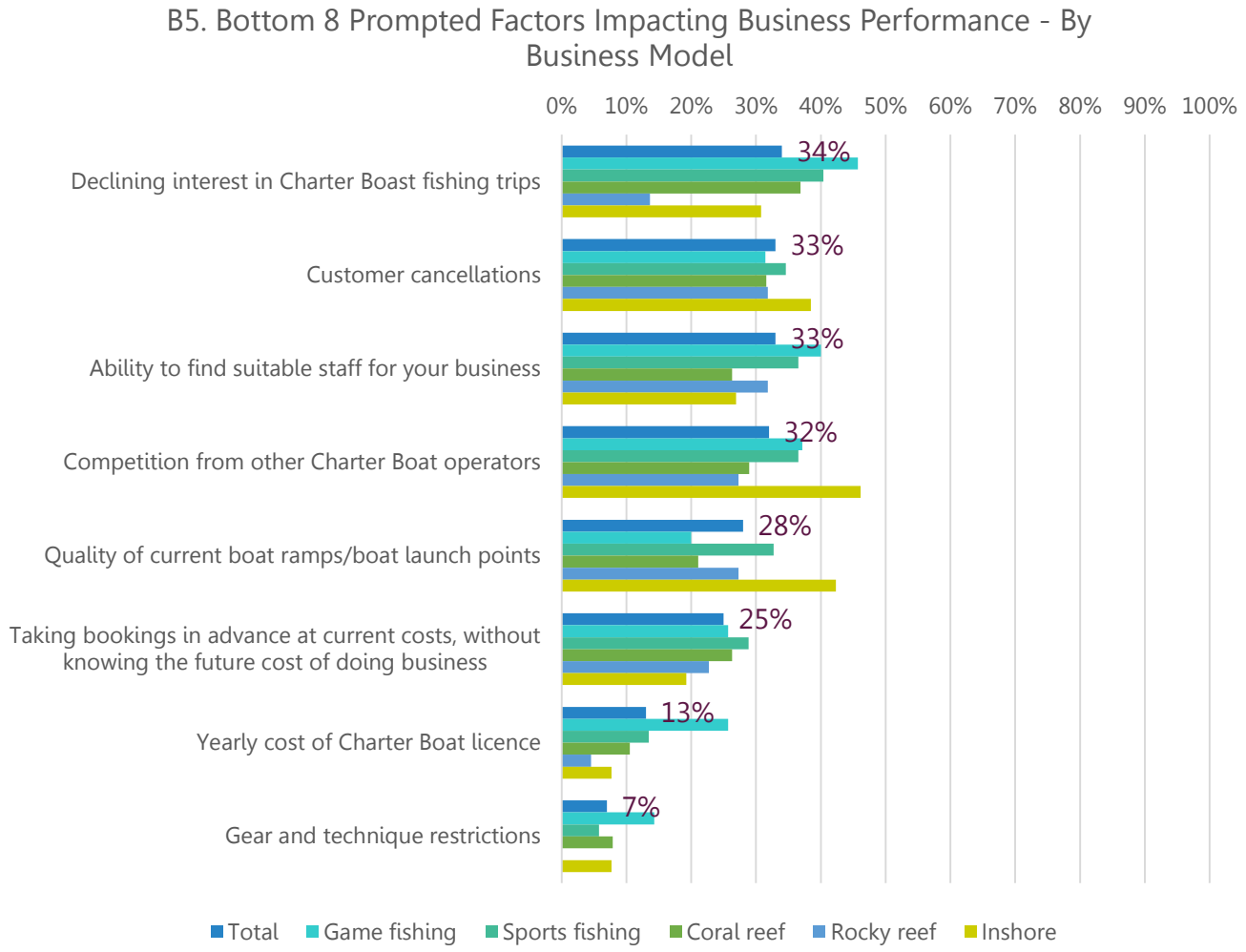


Top 4 Barriers	Game Fishing	Sports Fishing	Coral Reef	Rocky Reef	Inshore
Top Barrier	The number of sharks at fishing grounds	The number of sharks at fishing grounds	The number of sharks at fishing grounds	The number of sharks at fishing grounds	The number of sharks at fishing grounds
Second Barrier	Increase in rec. fishing boats	Loss of income due to weather	Loss of income due to weather	Loss of income due to weather	Quantity of fish stocks generally
Third Barrier	Admin. burden of regulation	Increase in rec. fishing boats	Increase in rec. fishing boats	Admin. burden of regulation	Increase in rec. fishing boats
Fourth Barrier	Amenities for customers in region	Amenities for customers in region	Admin. burden of regulation	Increase in rec. fishing boats	Quantity of fish stocks for species fish for

The top four barriers shift slightly between each business model. Quantity of fish stocks is more of a concern for Inshore businesses, whereas the administrative burden of regulations, and loss of income due to weather are more common among all other business models.

B11. Below are some ideas that could help to improve your business performance. 0 to 10 scale, 0 means 'Not at all likely to improve my business performance', 10 means 'Extremely likely to improve my business performance'.
Asked of all licence holders (n=100), Likely to improve those rated 6, 7, 8, 9 or 10.

Business Performance – Barriers by Business Model (Bottom 8)



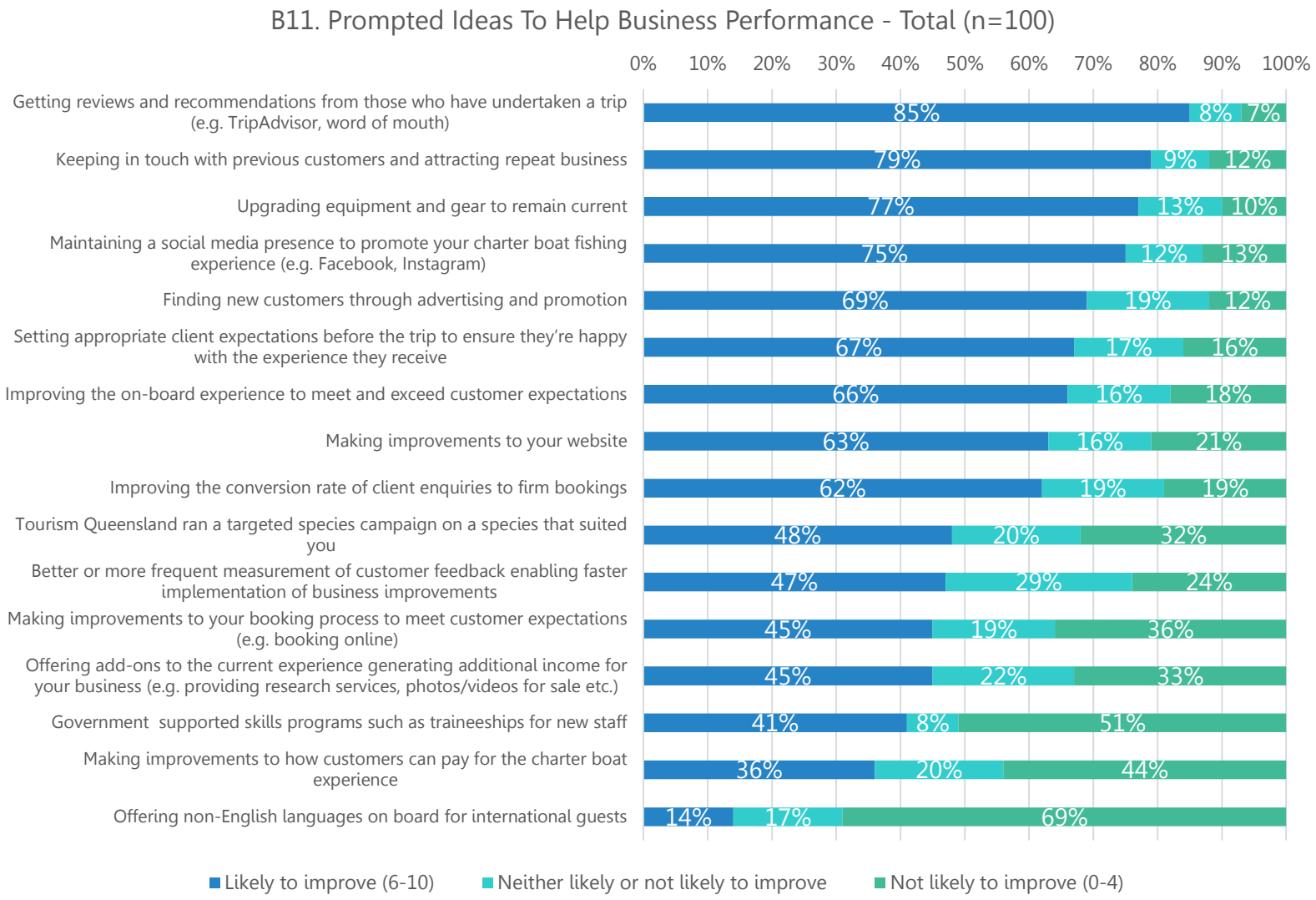
The prompted barriers that are <u>not of concern</u> to businesses include:

- Gear and technique restrictions (lowest for all business models).
- Yearly cost of the Charter Boat licence (second lowest for all, apart from Game Fishing businesses).
- Taking bookings in advance at current costs without knowing the future cost of doing business.

Competition from other Charter Boat operators, and the quality of current boat ramps/boat launch points is <u>more of a concern</u> to the Inshore businesses.

B11. Below are some ideas that could help to improve your business performance. 0 to 10 scale, 0 means 'Not at all likely to improve my business performance', 10 means 'Extremely likely to improve my business performance'.
Asked of all licence holders (n=100), Likely to improve those rated 6, 7, 8, 9 or 10.

Business Performance – Opportunities by Total



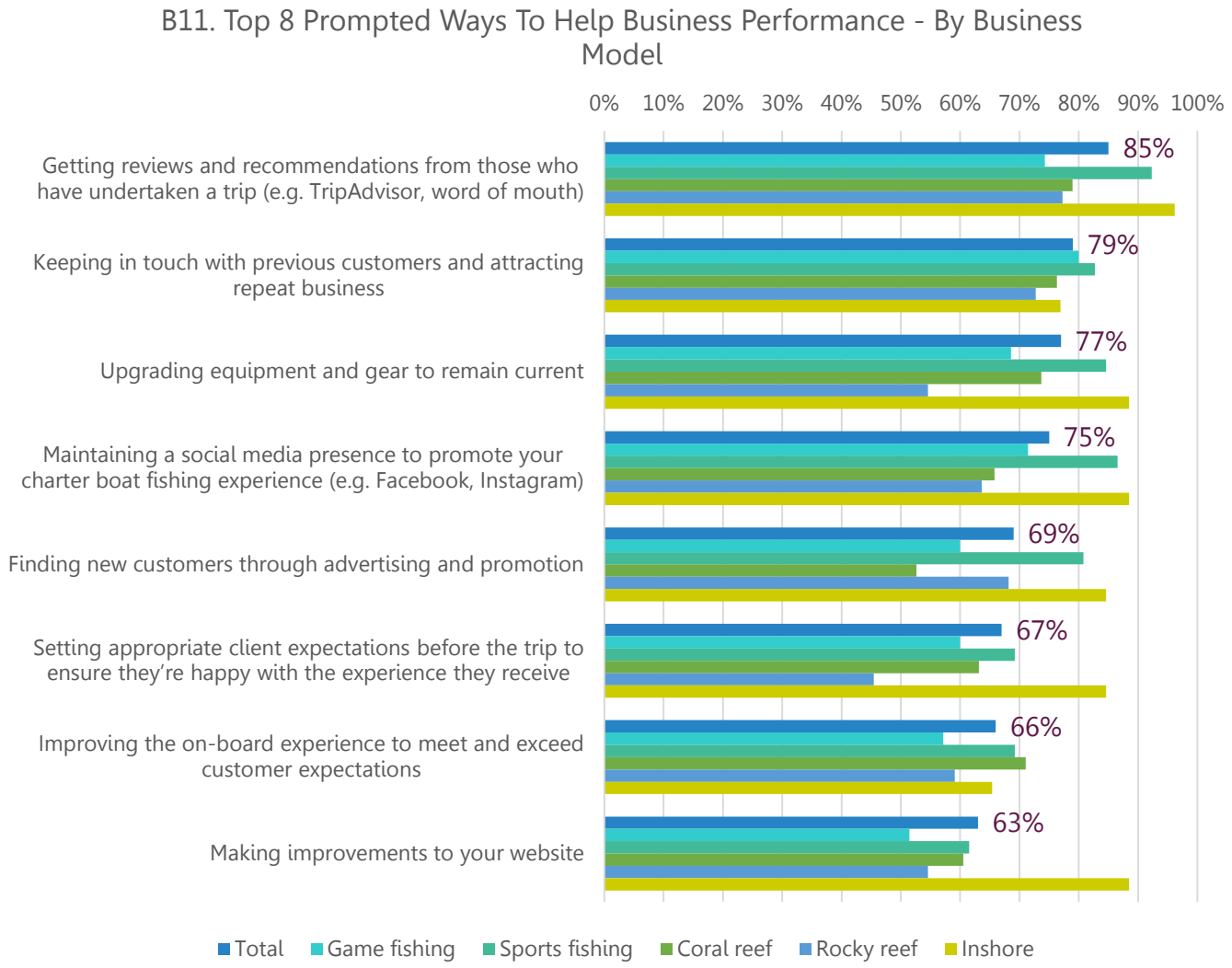
When asked to rank potential ideas for what could help operators' improve their business performance, the majority (85%) agreed that getting reviews and recommendations from those who have undertaken a trip (e.g., Trip Advisor or word of mouth) is key to improving their business performance.

Other key ideas include:

- Keeping in touch with previous customers and attracting repeat business (79%).
- Upgrading equipment and gear to remain current (79%).
- Maintaining a social media presence to promote your charter boat fishing experience (e.g., Facebook, Instagram) (75%).

B11. Below are some ideas that could help to improve your business performance. 0 to 10 scale, 0 means 'Not at all likely to improve my business performance', 10 means 'Extremely likely to improve my business performance'.
Asked of all licence holders (n=100), Likely to improve those rated 6, 7, 8, 9 or 10, Neither likely or not likely to improve those who rated 5, Not likely to improve those rated 0, 1, 2, 3, 4.

Business Performance – Opportunities by Business Model (Top 8)

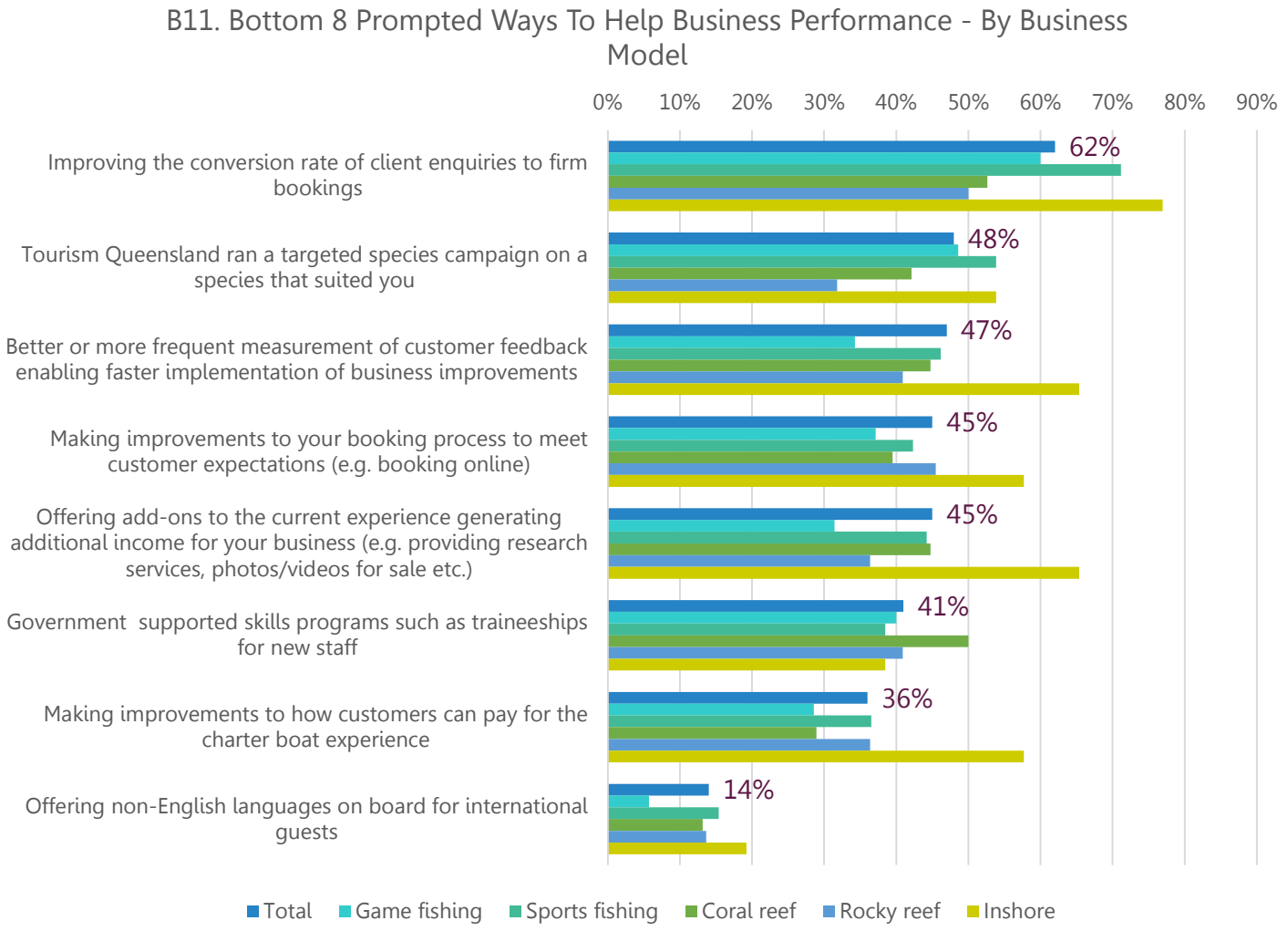


Top 4 Opportunities	Game Fishing	Sports Fishing	Coral Reef	Rocky Reef	Inshore
Top	Keeping in touch with previous guests	Getting reviews	Getting reviews	Getting reviews	Getting reviews
Second	Getting reviews	Maintain social media presence	Keeping in touch with previous guests	Keeping in touch with previous guests	Maintain social media presence
Third	Maintain social media presence	Upgrade equip. to remain current	Upgrade equip. to remain current	Finding new clients through ads	Upgrade equip. to remain current
Fourth	Upgrade equip. to remain current	Keeping in touch with previous guests	Maintain social media presence	Maintain social media presence	Making improve. to website

Getting reviews and recommendations, and maintaining a social media presence are common top opportunities among all business models.

B11. Below are some ideas that could help to improve your business performance. 0 to 10 scale, 0 means 'Not at all likely to improve my business performance', 10 means 'Extremely likely to improve my business performance'.
Asked of all licence holders (n=100), Likely to improve those rated 6, 7, 8, 9 or 10.

Business Performance – Opportunities by Business Model (Bottom 8)



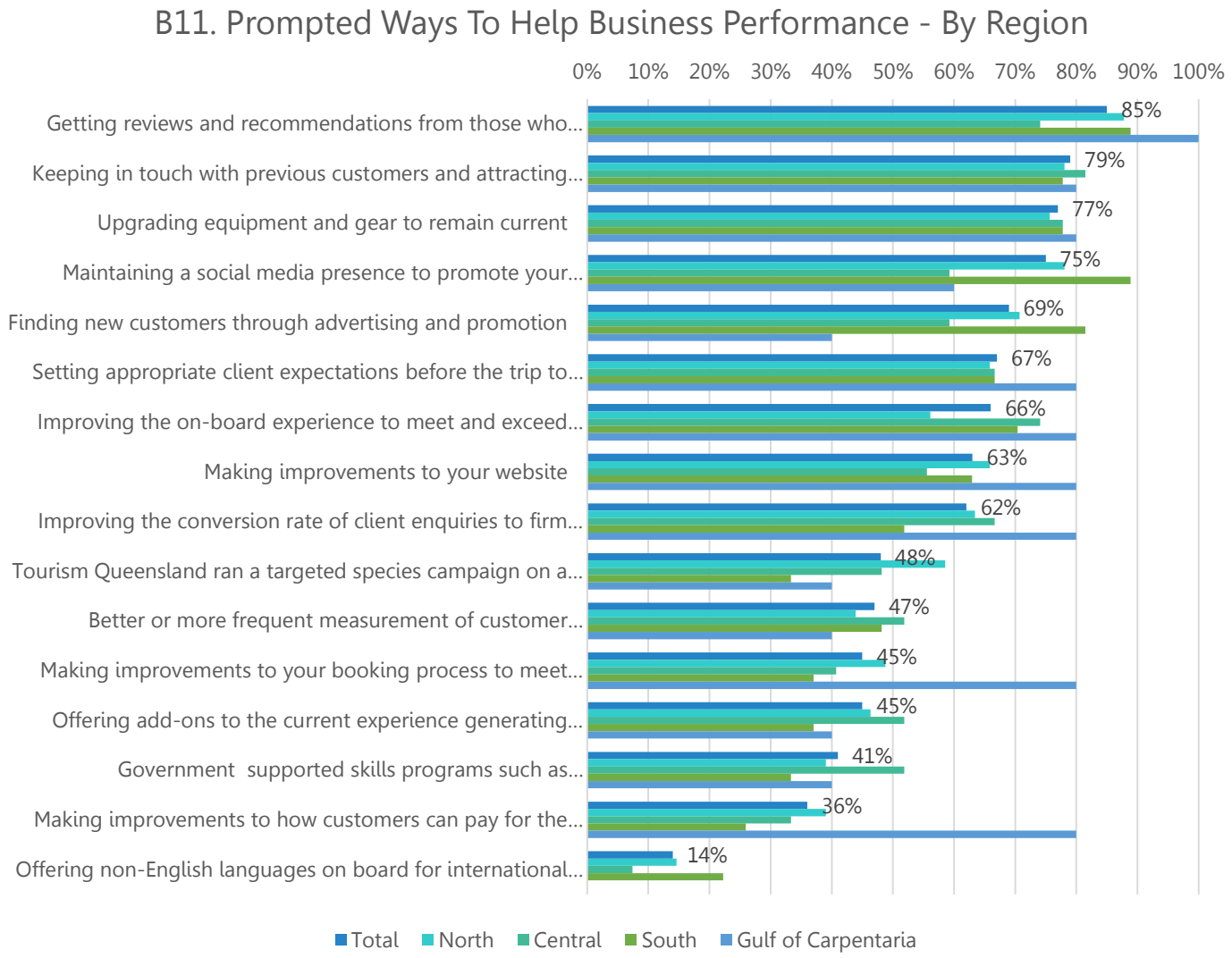
The prompted opportunities that are not of interest to businesses include:

- Offering non-English languages on board for international guests (lowest opportunity across all business models).
- Making improvements to how customers can pay for the charter boat experience (second lowest for all except Inshore businesses).
- Government supported skills programs such as traineeships for new staff.

Inshore business in general were supportive of most opportunities with only two of the opportunities tested rating below 50% as likely to improve their business (non-English language offerings and government support skills programs not supported by this business model group).

B11. Below are some ideas that could help to improve your business performance. 0 to 10 scale, 0 means 'Not at all likely to improve my business performance', 10 means 'Extremely likely to improve my business performance'.
Asked of all licence holders (n=100), Likely to improve those rated 6, 7, 8, 9 or 10.

Business Performance – Opportunities by Region

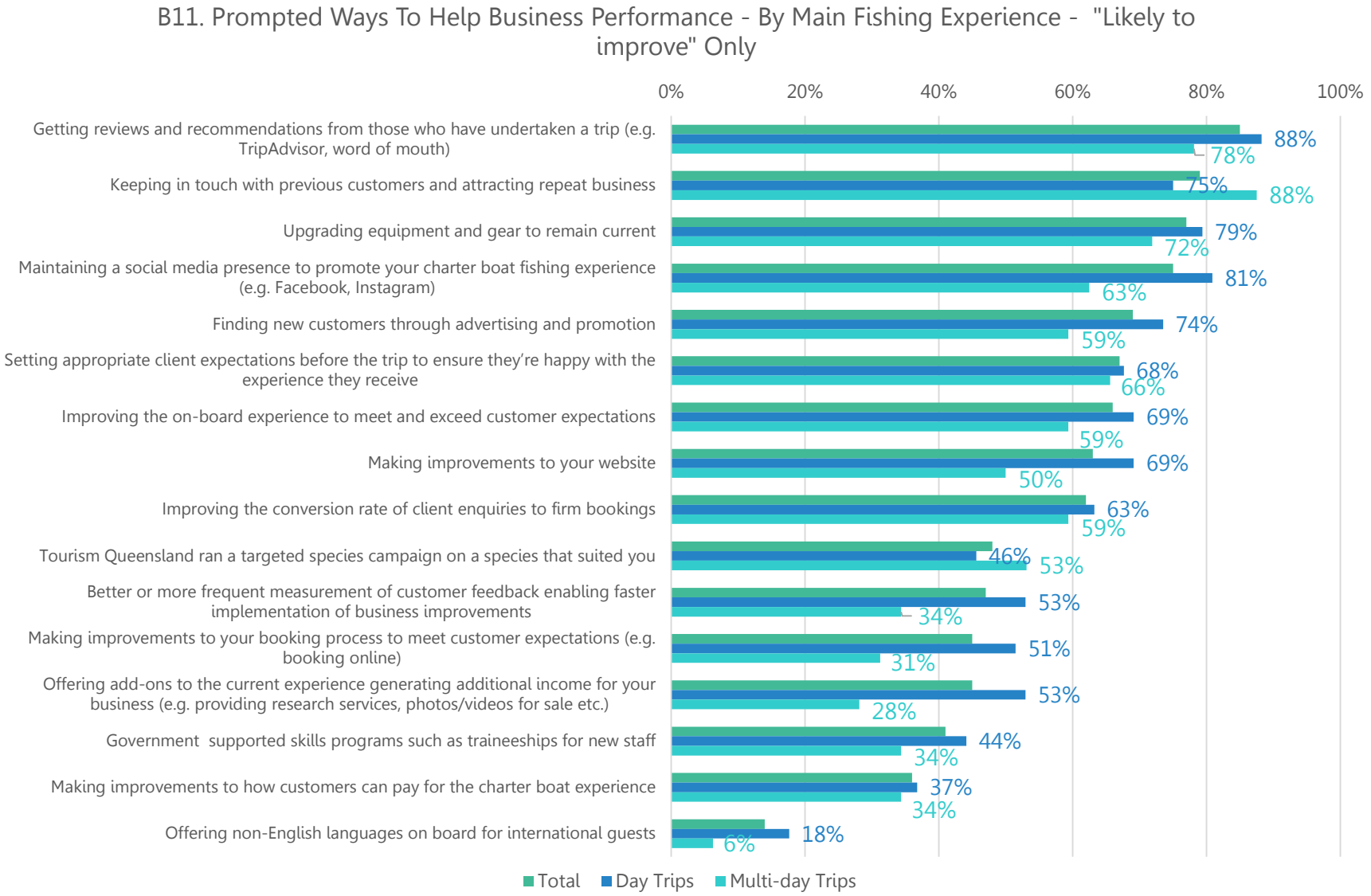


Top 4 Opportunities	North	Central	South	Gulf of Carpentaria
Top	Getting reviews	Keeping in touch with previous guests	Getting reviews	Getting reviews
Second	Keeping in touch with previous guests	Upgrade equip. to remain current	Maintain social media presence	Keeping in touch with previous guests
Third	Maintain social media presence	Getting reviews	Finding new clients through ads	Upgrade equip. to remain current
Fourth	Upgrade equip. to remain current	Improving on-board experience	Keeping in touch with previous guests	Setting appropriate expectations

Getting reviews and recommendations, and keeping in touch with previous guests are common opportunities across all regions.

B11. Below are some ideas that could help to improve your business performance. 0 to 10 scale, 0 means 'Not at all likely to improve my business performance', 10 means 'Extremely likely to improve my business performance'.
Asked of all licence holders (n=100), Likely to improve those rated 6, 7, 8, 9 or 10.

Business Performance – Opportunities by Main Fishing Experience



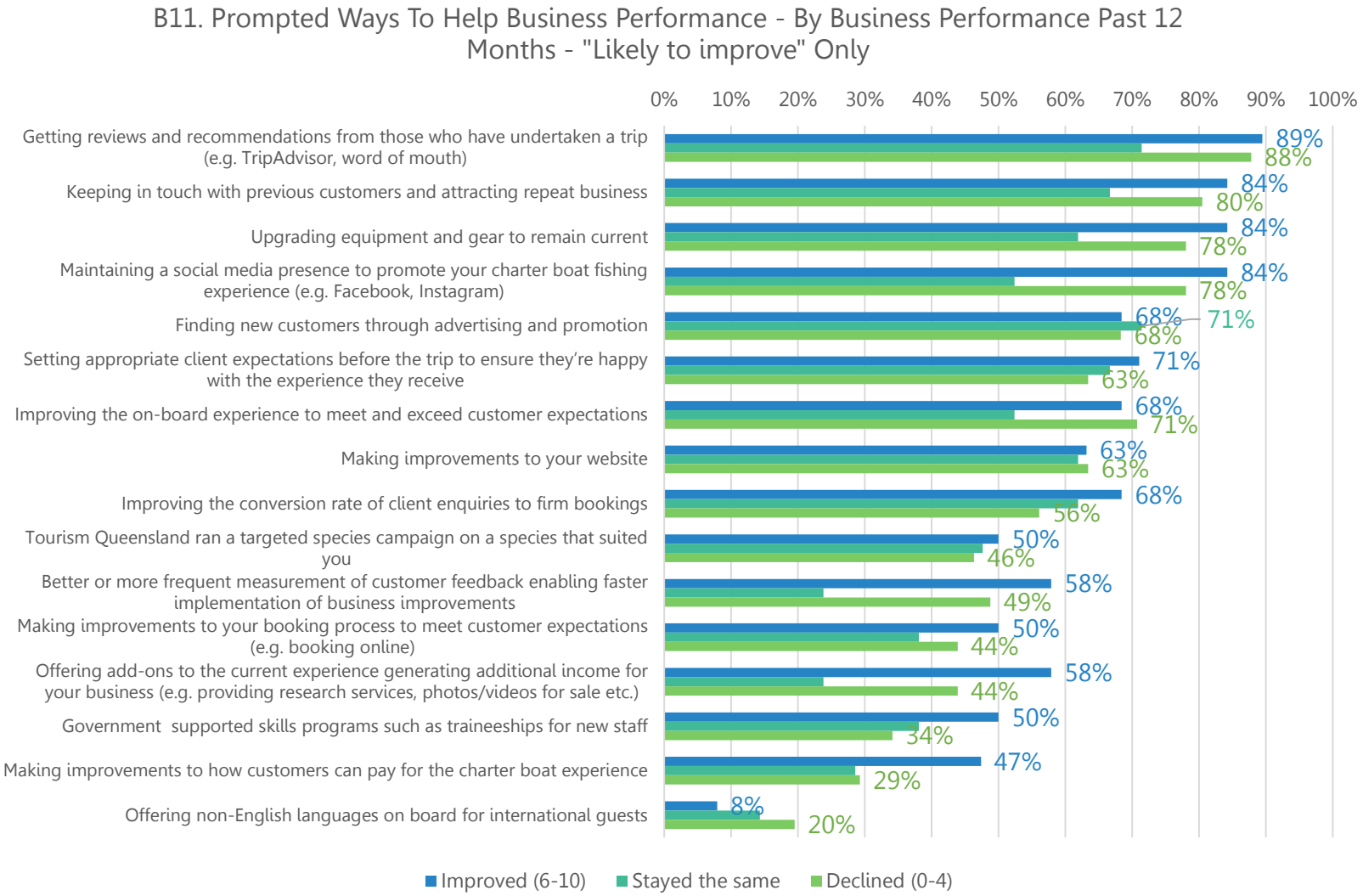
When viewing these results by different operator types, the most important element for multi-day operators is to keep in touch with previous customers and attract repeat business (88%).

Day-trip operators agree it is important to get word of mouth recommendations and reviews and maintain their social media presence but also understand agree that they need to:

- Upgrade equipment to remain current (79%).
- Find new customers through advertising and promotion (74%).
- Improve on-board experience (69%).
- Improve website experience (69%).
- Set client expectations before the trip to ensure clients are happy with the experience they receive (68%).

B11. Below are some ideas that could help to improve your business performance. 0 to 10 scale, 0 means 'Not at all likely to improve my business performance', 10 means 'Extremely likely to improve my business performance'.
Asked of all licence holders (n=100), Likely to improve those rated 6, 7, 8, 9 or 10.

Business Performance – Opportunities by Business Performance in the last 12 months



When viewing these results by operator's business performance in the last 12 months, there is strong agreement across the top ideas for business improvement for operators whose business either improved or declined in the last 12 months.

However there is less agreement across any of the ideas for those operators who business stayed the same for any idea except for one idea, which is to find new customers through advertising and promotion (71%).

B11. Below are some ideas that could help to improve your business performance. 0 to 10 scale, 0 means 'Not at all likely to improve my business performance', 10 means 'Extremely likely to improve my business performance'.
Asked of all licence holders (n=100), Likely to improve those rated 6, 7, 8, 9 or 10.

Business Performance – Opportunities by Business Model

B11AA. Top Species To Target (Total n=46)

Top 5 Species	Game Fishing (n=16)	Sports Fishing (n=27)	Coral Reef (n=15)	Rocky Reef (n=7)	Inshore (n=14)
Top	Black Marlin, Blue Marlin or Sailfish (69%)	Barramundi (41%)	Coral Trout (60%)	Pink Snapper (57%)	Barramundi (50%)
Second	Spanish Mackerel	Spanish Mackerel	Spanish Mackerel	Coral Trout	Trevally
Third	Coral Trout	Trevally	Red Emperor	Spanish Mackerel	Mangrove Jack
Fourth	Barramundi	Black Marlin, Blue Marlin or Sailfish	Sweet Lip	Red Emperor	Coral Trout
Fifth	Trevally, Red Emperor, Mackerel, Sweet Lip, Tuna, Fingermark, Red Throat Emperor (all equal fifth)	Coral Trout, Mackerel (equal fifth)	Black Marlin, Blue Marlin or Sailfish, Red Throat Emperor (equal fifth)	Sweet Lip, Trevally, Nannygai (equal fifth)	Spanish Mackerel

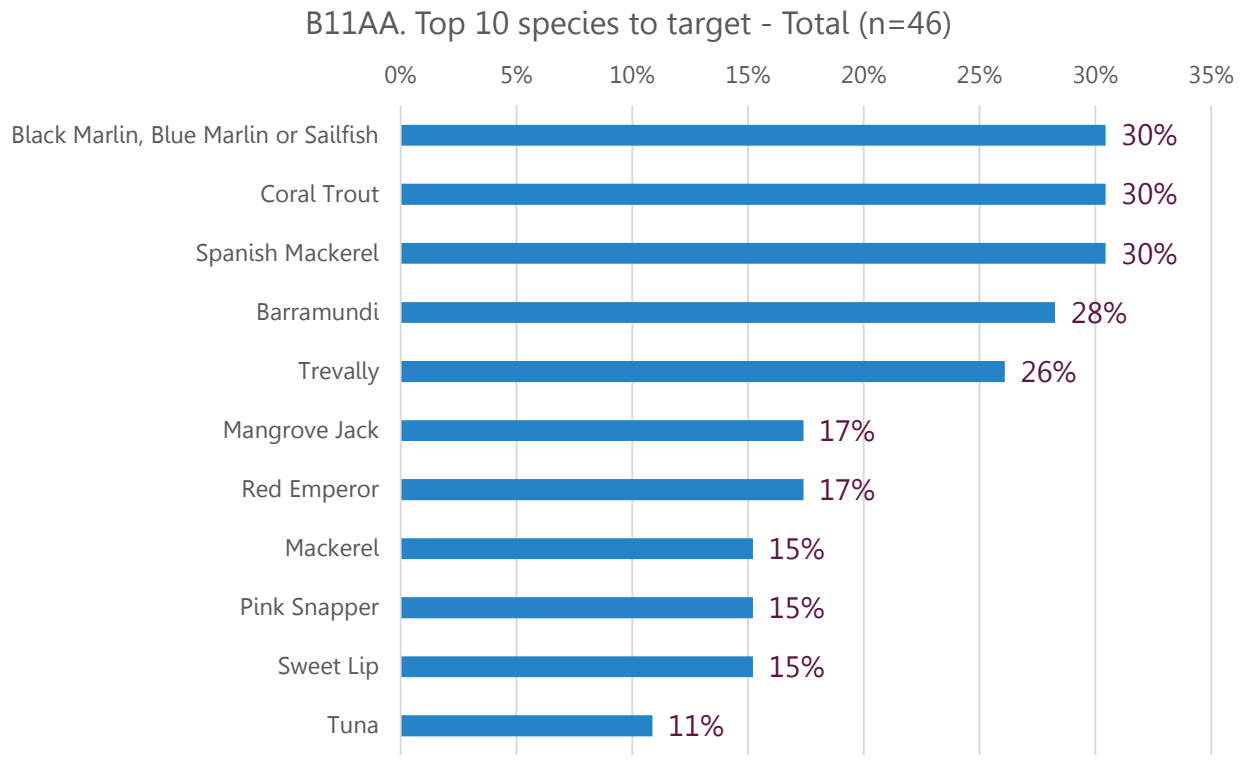
For those operators who agreed that the idea of Tourism Queensland running a targeted species program, the table provided here lists the top 5 species each business model would prefer.

Each business model has a clear species preference, however Spanish Mackerel and Coral Trout appear across all business models top 5 fish species for each business model.

Black Marlin, Blue Marlin or Sailfish promotion would be more suited to Game Fishing and Sports Fishing businesses.

B11AA. What specific species would you recommend to focus on?
Asked of those who rated B11L 'Tourism Queensland ran a targeted species campaign on a species that suited you' greater than 6, n=46.

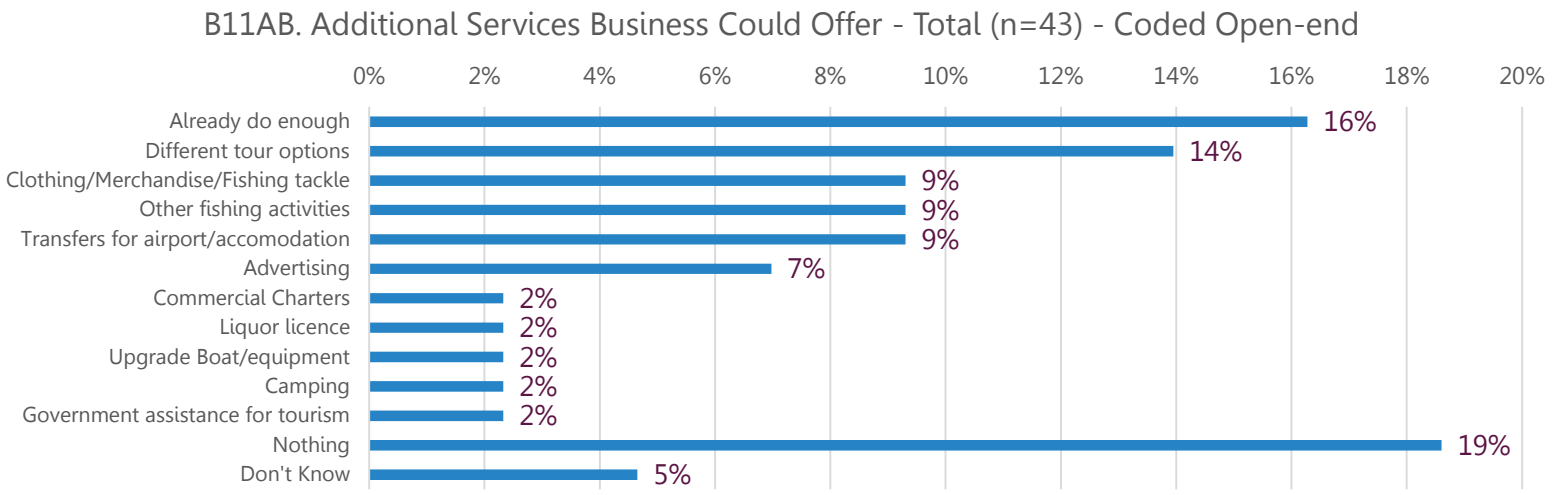
Business Performance – Opportunities Overall

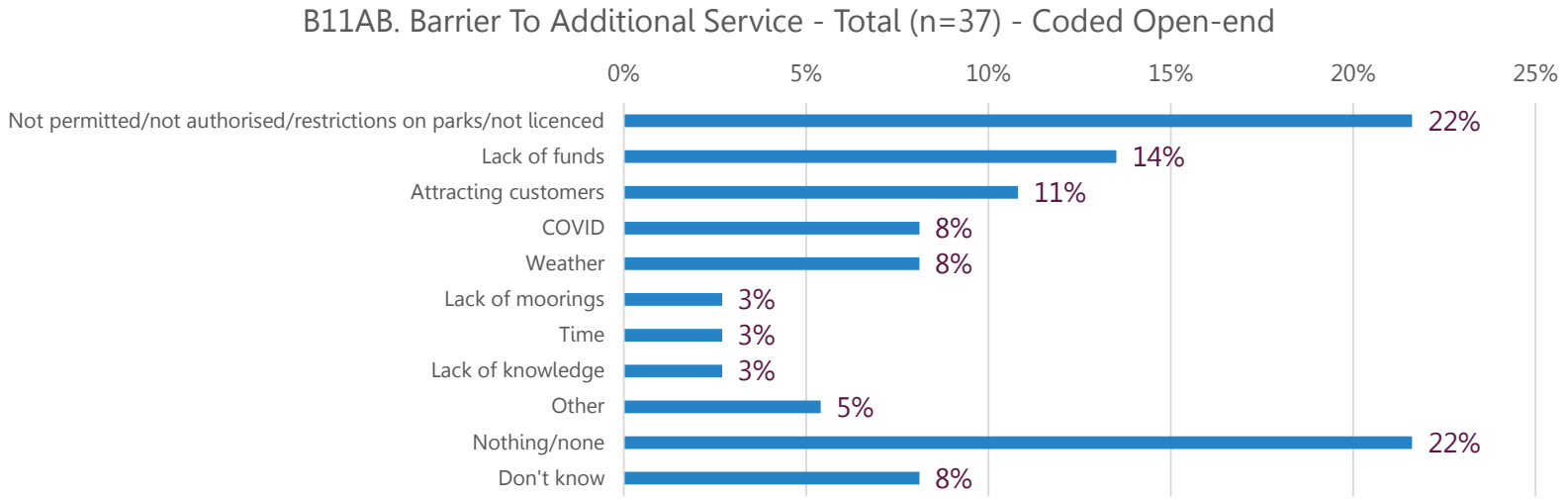


Overall, for those operators (48%) who agreed that the idea of Tourism Queensland running a targeted species campaign for a species that suited them would be likely to assist in helping them to improve their business performance, the key species to advertise would be either Black Marlin, Blue Marlin or Sailfish (30%), Coral Trout (30%) or Spanish Mackerel (30%).

B11AA. What specific species would you recommend to focus on?
Asked of those who rated B11L 'Tourism Queensland ran a targeted species campaign on a species that suited you' greater than 6, n=46.

Continual Improvement 1 by Total





For those operators (45%) who agreed that offering add-ons to the current experience to generate additional income for your business (e.g., providing research services, photo/videos for sale) would be a good way to improve business performance, suggestions for alternative add-ons included:

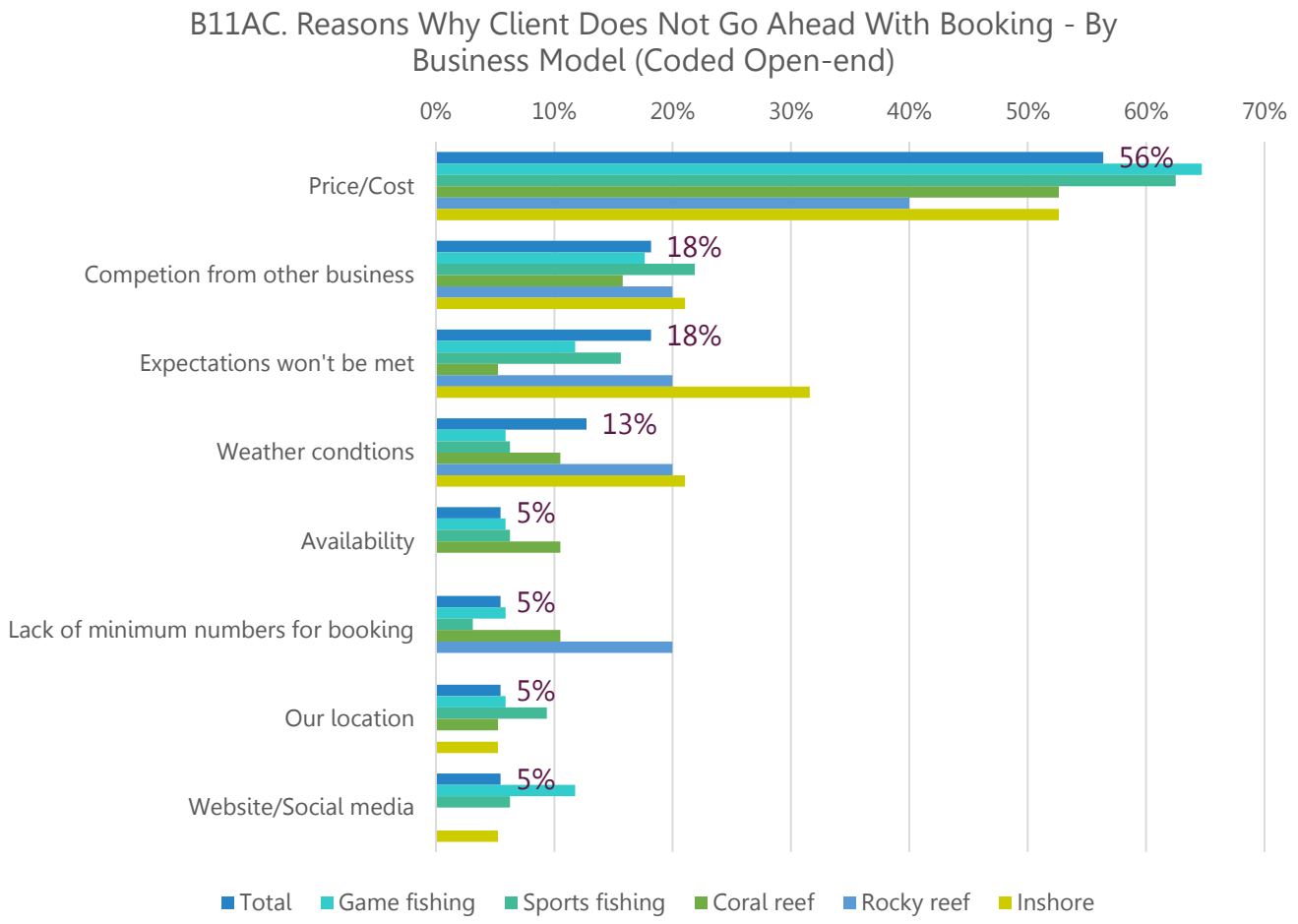
- Different tour options (14%).
- Clothing/merchandise/fishing tackle (9%).
- Other fishing activities (9%).
- Transfers for airport/accommodation (9%).

The key barriers for this group that are stopping operators from implementing these additional add-on ideas to generate additional income relate to:

- Not being permitted to do so (22%).
- Lacking funds to develop (14%).

B11AB. What additional things could your business offer that could generate additional income that you currently don't offer? What is getting in the way of you offering this service currently?
Asked of those who rated B11M 'Offering add-ons to the current experience generating additional income for your business (e.g. providing research services, photos/videos for sale etc.' greater than 6, n=43.

Continual Improvement 2 by Business Model

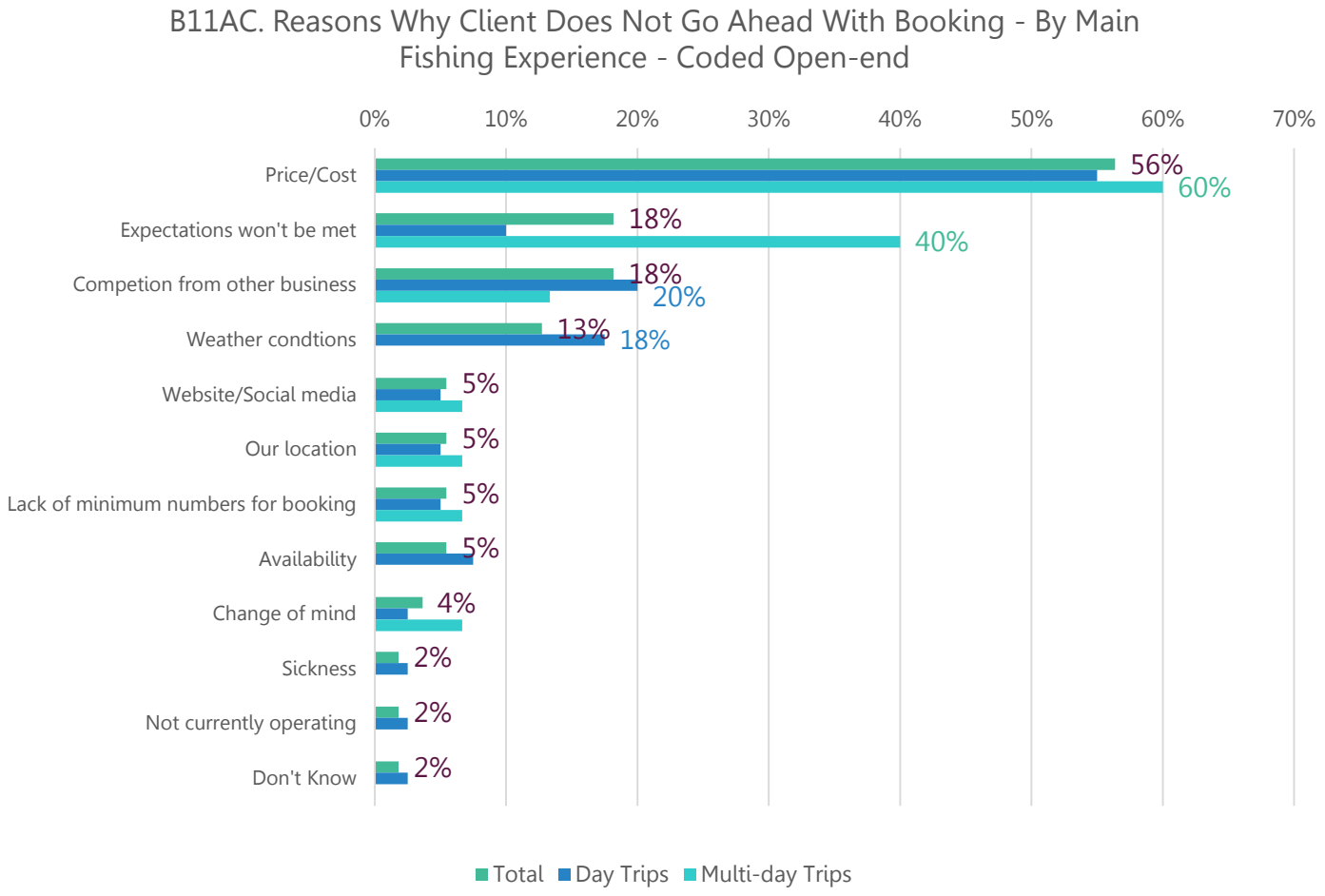


For those operators who mentioned that improving the rate of enquiries into firm bookings would have an improvement on their business (62%), the main reasons business believe clients don't follow through after making a booking include:

- Price/Cost (higher impact for Game Fishing and Sports Fishing businesses).
- Expectations won't be met (significantly higher impact for Inshore businesses).
- Competition from other business.
- Weather conditions (higher for Rocky Reef and Inshore businesses).

B11AC. You mentioned that improving the conversion rate of enquiries into firm bookings will have an improvement on your business. What do you think are the reasons why a client does not go ahead with a booking after making an enquiry with you?
Asked of those who rated B11O 'Improving the conversion rate of client enquiries to firm bookings' greater than 6, n=55.

Continual Improvement 2 by Main Fishing Experience

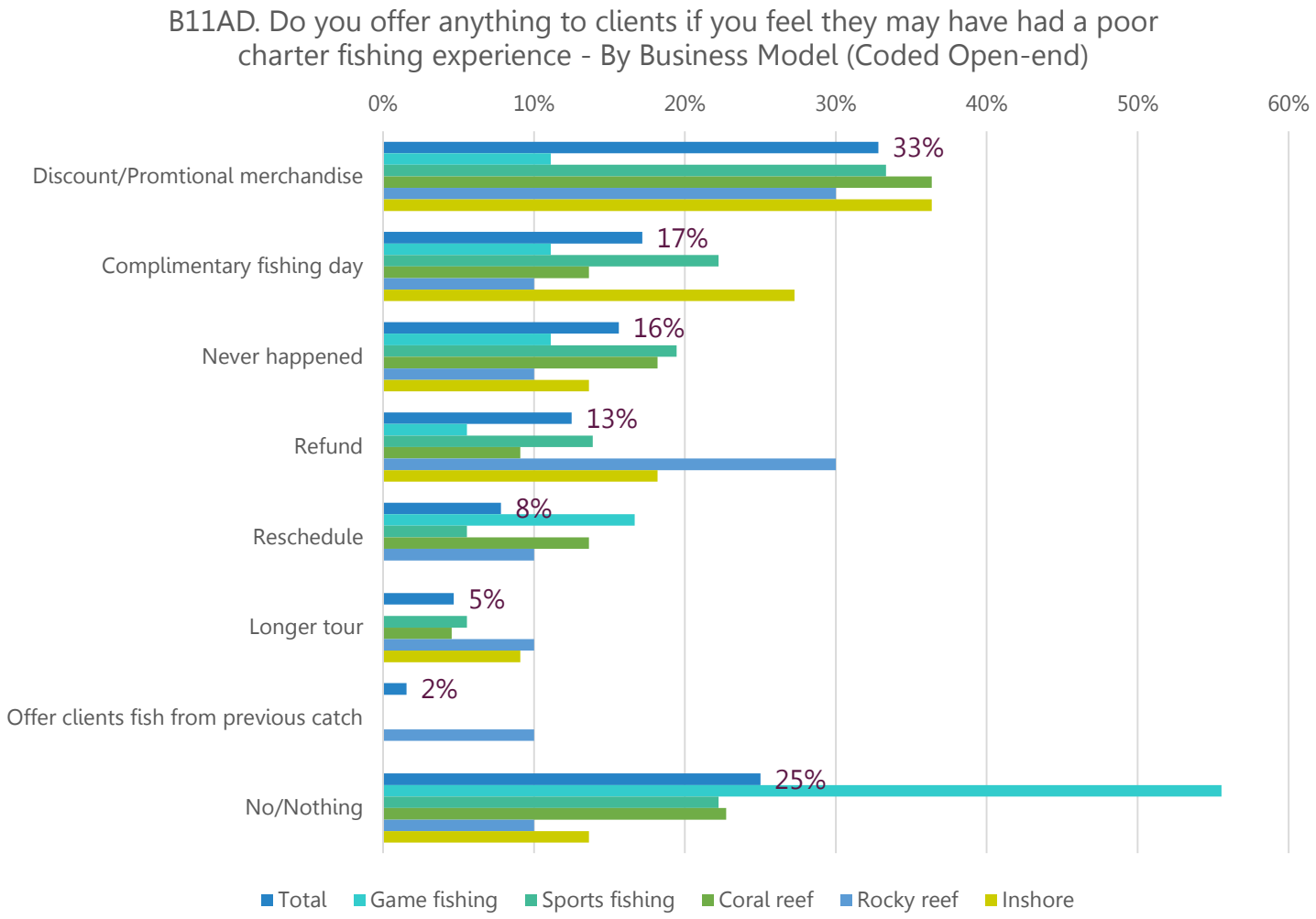


This result is consistent when looking at this result by their main fishing experience with the top reasons including:

- Price/Cost (higher impact for multi-day trip operators).
- Expectations won't be met (significantly higher impact for multi-day trip operators).
- Competition from other business (higher for day-trip operators).
- Weather conditions (significantly higher for day-trip operators).

B11AC. You mentioned that improving the conversion rate of enquiries into firm bookings will have an improvement on your business. What do you think are the reasons why a client does not go ahead with a booking after making an enquiry with you?
Asked of those who rated B11O 'Improving the conversion rate of client enquiries to firm bookings' greater than 6, n=55.

Continual Improvement 3 by Business Model



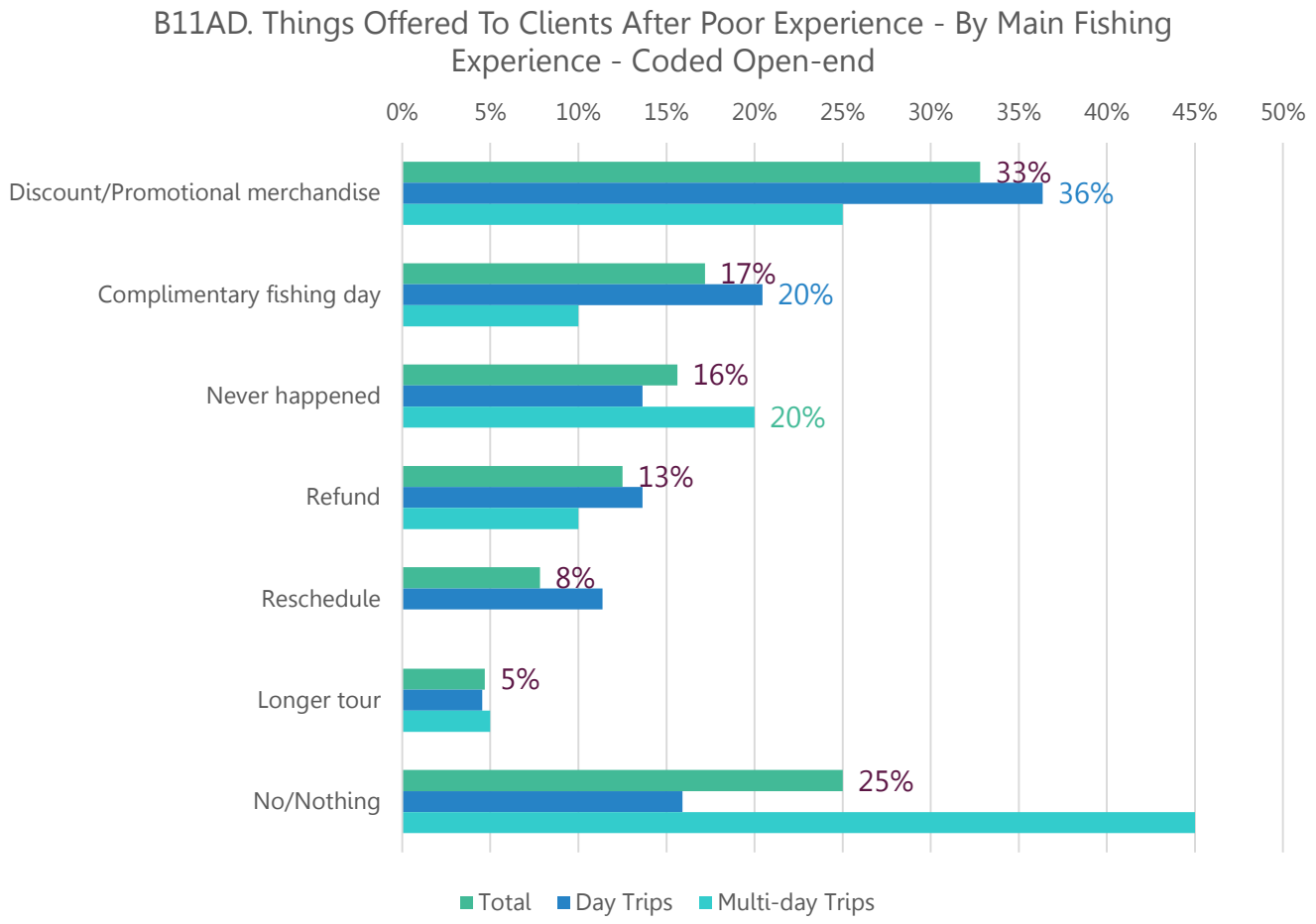
Of those operators who mentioned setting client expectations before the trip to ensure they are happy with the experience they receive as a key idea to improve business performance (67%), when probed further about what was offered in the event of a poor charter fishing experience, Game Fishing businesses are more likely to offer nothing (56%).

Rocky Reef businesses will offer a discount/ promotional merchandise, or a refund.

Coral Reef and Inshore businesses are likely to offer a discount/promotional merchandise, with Inshore businesses also offering complimentary fishing days.

B11AD. Do you offer anything to clients if you feel they may have had a poor charter fishing experience? What do you offer?
Asked of those who rated B11P 'Setting appropriate client expectations before the trip to ensure they're happy with the experience they receive' greater than 6, n=64.

Continual Improvement 3 by Main Fishing Experience

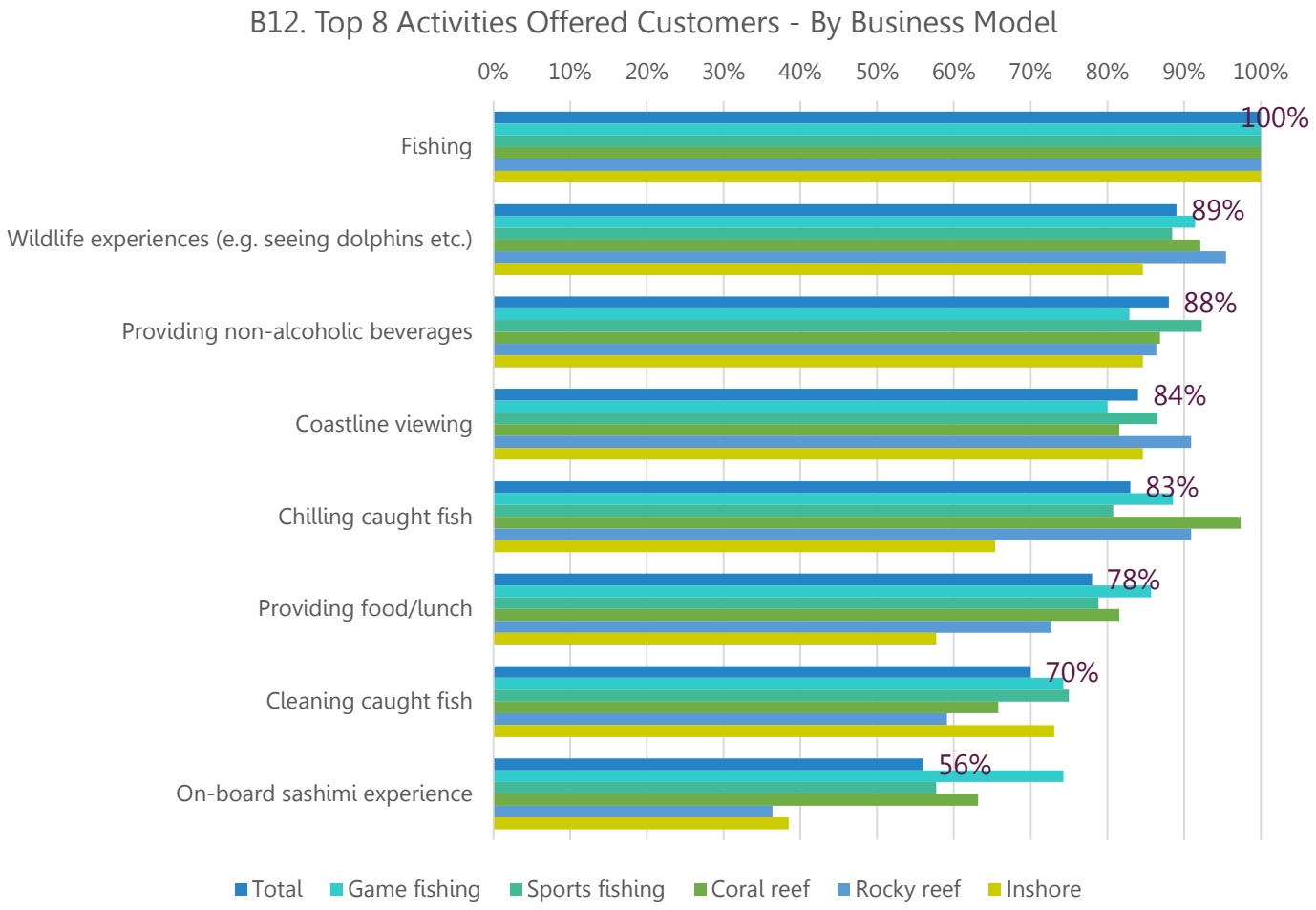


We viewing this result by their main fishing experience we see the key things offered include:

- Discounts/promotional merchandise (slightly higher for day-trip operators).
- Complimentary fishing days (slightly higher for day-trip operators)
- Nothing because it has never happened (higher for multi-day operators).

B11AD. Do you offer anything to clients if you feel they may have had a poor charter fishing experience? What do you offer?
Asked of those who rated B11P 'Setting appropriate client expectations before the trip to ensure they're happy with the experience they receive' greater than 6, n=64.

Business Operations – Activities offered by Total & Business Model (Top 8)

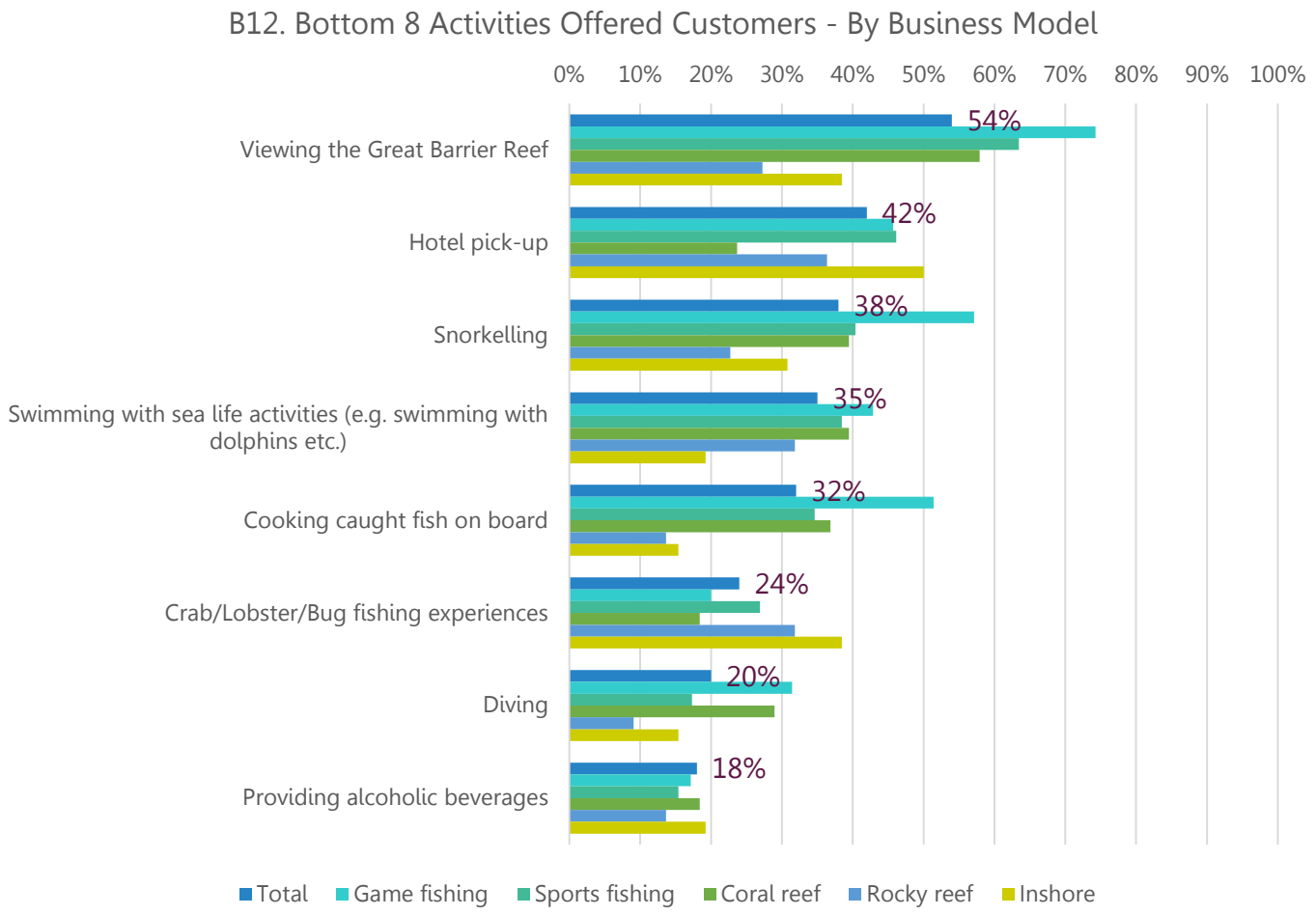


Top 4 Activities	Game Fishing	Sports Fishing	Coral Reef	Rocky Reef	Inshore
Top	Fishing	Fishing	Fishing	Fishing	Fishing
Second	Wildlife experiences	Providing non-alcoholic beverages	Chilling caught fish	Wildlife experiences	Wildlife experiences
Third	Chilling caught fish	Wildlife experiences	Wildlife experiences	Coastline viewing	Providing non-alcoholic beverages
Fourth	Providing food/lunch	Coastline viewing	Providing non-alcoholic beverages	Chilling caught fish	Coastline viewing

The top activities are consistent across all business models, and all are providing wildlife experiences, coastline viewing in addition to fishing.

B12. Which of the following activities do you offer customers as part of their trip? Please select all that apply.
Asked of all licence holders, n=100.

Business Operations – Activities offered by Total & Business Model (Bottom 8)



The activities that are not being provided by all business models include:

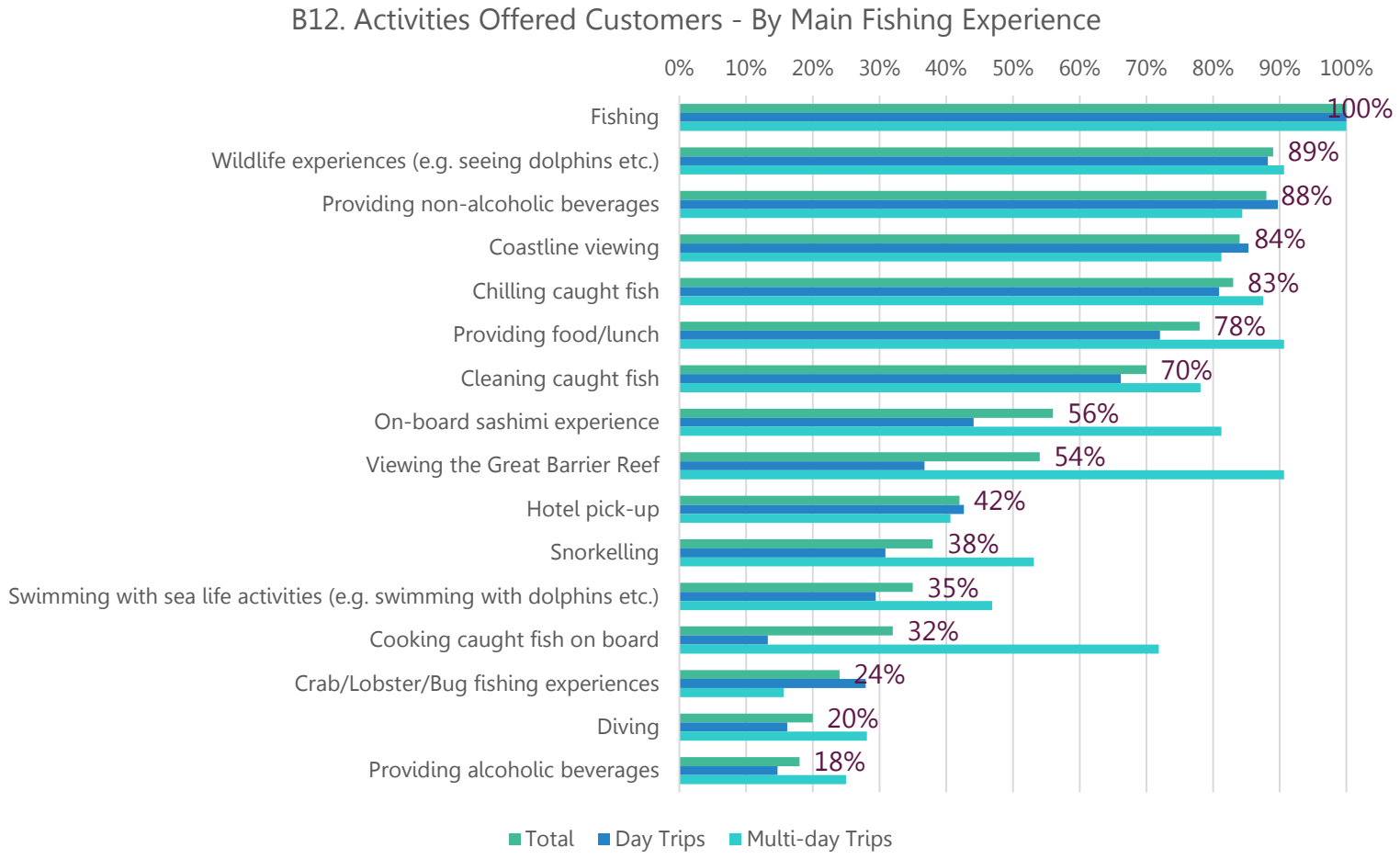
- Providing alcoholic beverages
- Diving
- Crab/Lobster/Bug fishing experiences

Over half of Game Fishing businesses cook caught fish on board, and offer snorkelling experiences.

Inshore businesses are more likely to offer hotel pick-up services.

B12. Which of the following activities do you offer customers as part of their trip? Please select all that apply.
Asked of all licence holders, n=100.

Business Operations – Activities offered by Total & Main Fishing Experience



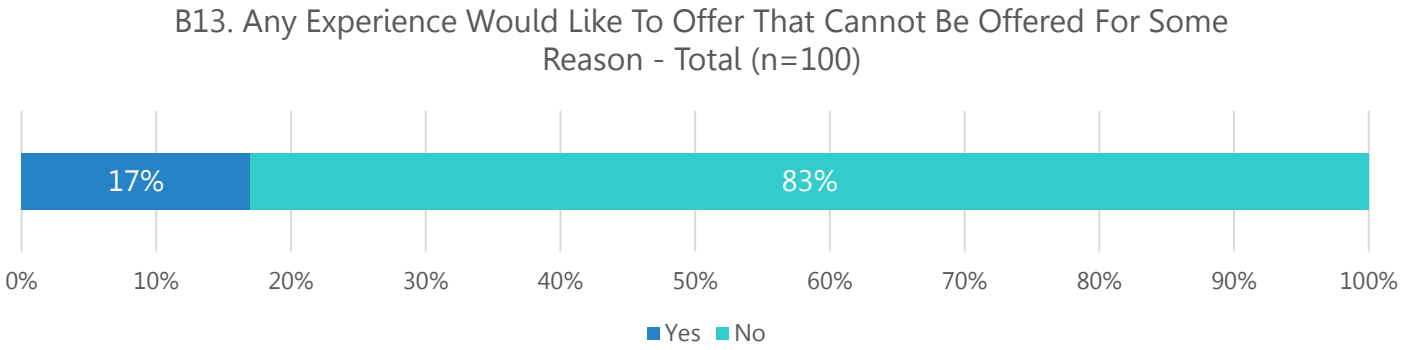
When asked what activities were offered by charter boat operators, in addition to fishing (which was obviously offered by 100% of all operators), additional activities also included:

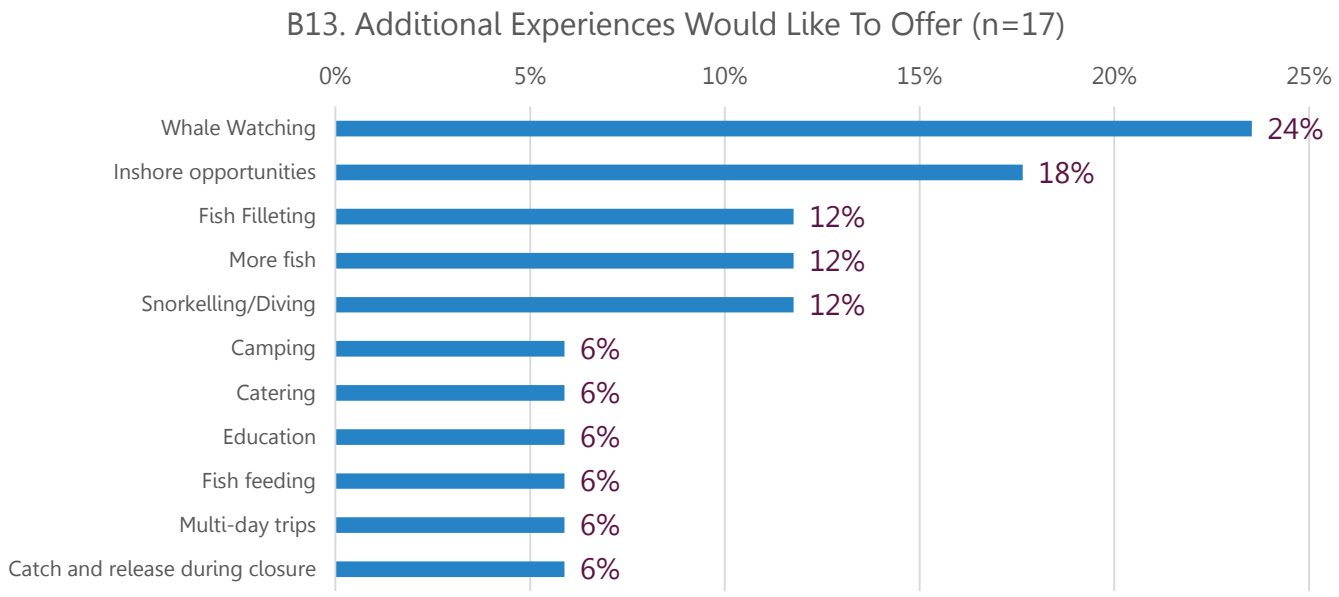
- Wildlife experiences (e.g., seeing sea lions, dolphins).
- Providing non-alcoholic beverages.
- Coastline viewing.
- Chilling caught fish.

Multi-day operators are much more likely to offer a full package deal with all of the above and also other activities such as food/lunch, cleaning caught fish, on-board sashimi experiences, viewing the Great Barrier Reef, snorkelling, swimming with sea life and cooking caught fish on board.

B12. Which of the following activities do you offer customers as part of their trip? Please select all that apply.
Asked of all licence holders, n=100.

Business Operations – Other activities desired (and barriers)



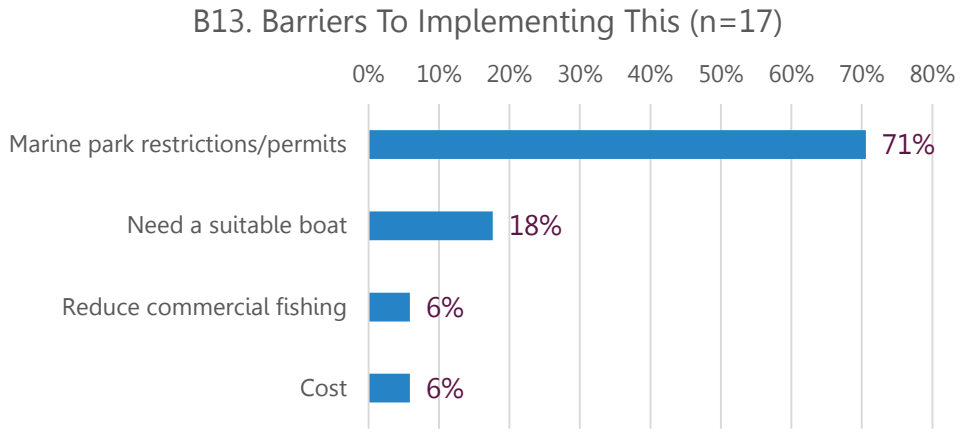


When asked if there was any experience that operators would like to offer but can't offer for some reason, 17% of operators agreed there were some experiences they would like to offer.

These included:

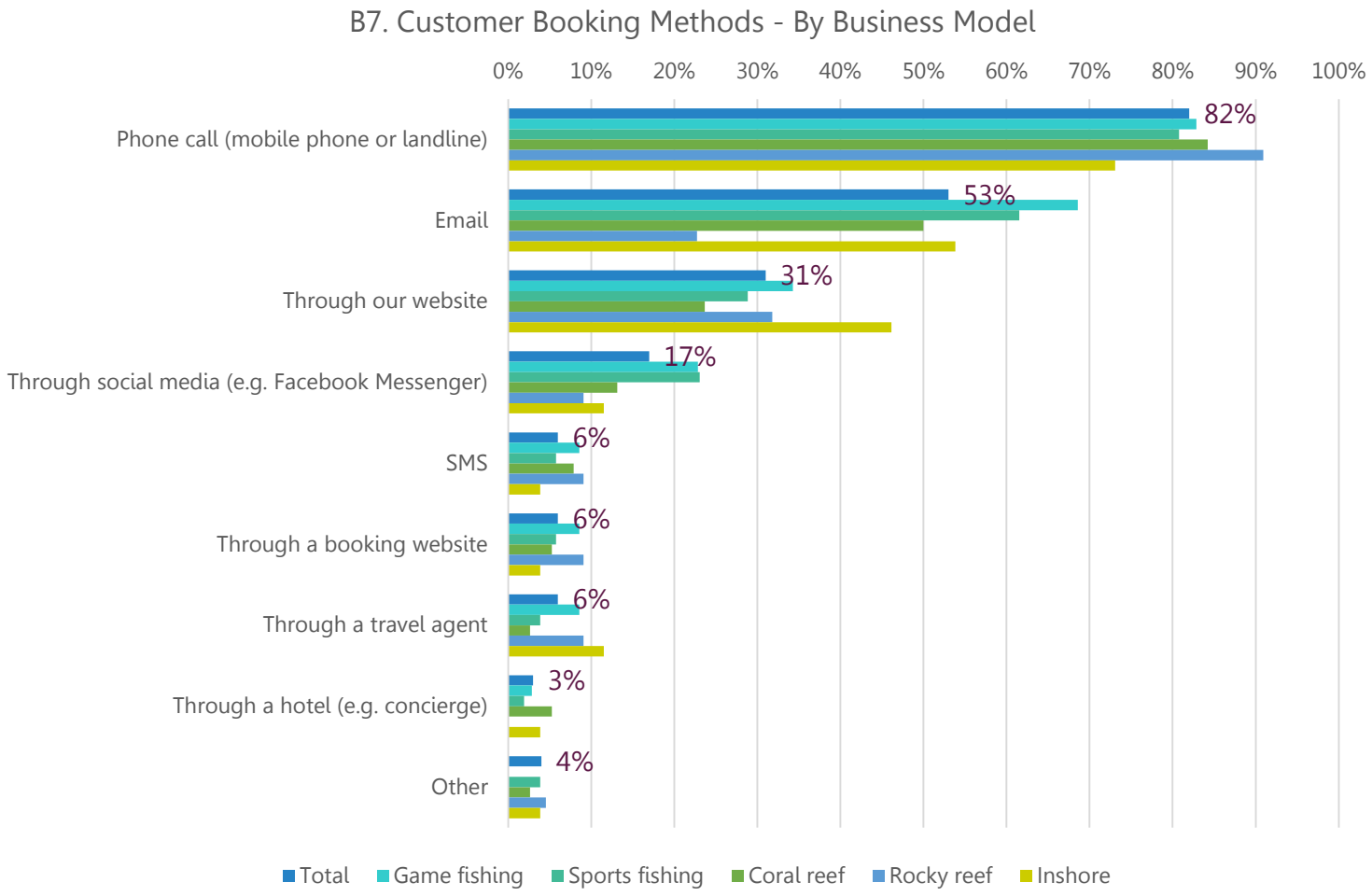
- Whale watching (24%).
- In-shore opportunities (18%).
- Fish filleting, fish availability or snorkelling (each 12%).

The key barriers to implementing these additional ideas included marine park restrictions/permits (71%) or boat suitability (18%).



B13. Is there any experience you would like to offer that you cannot offer for some reason? What would that experience be and what barriers are there to implementing this?
Asked of all licence holders, n=100. n=17 have additional experiences they would like to offer.

Business Operations - Booking Process by Business Model



The majority of all businesses tend to receive bookings by phone (over 70% for all business models).

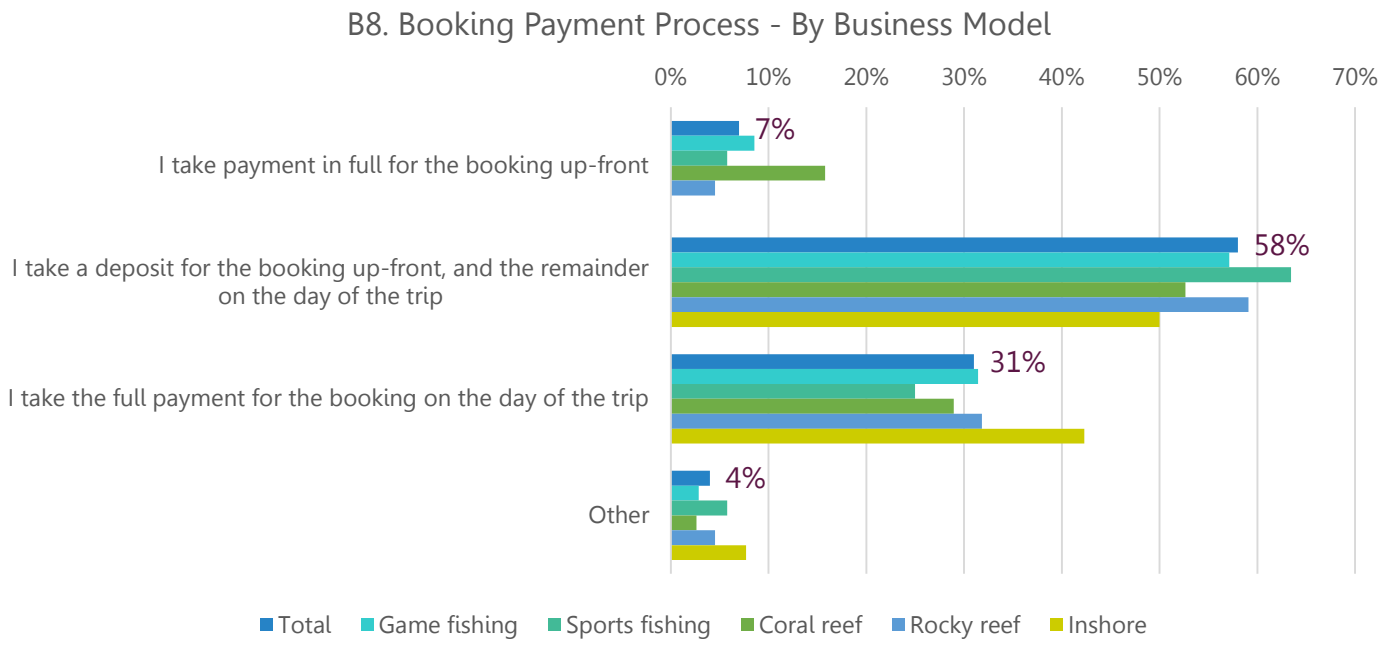
Game Fishing, Sports Fishing and Coral Reef businesses tend to receive bookings via phone and email.

Rocky Reef tend to receive bookings by phone, with bookings unlikely to be made via email for this business model.

Inshore businesses receive bookings via phone, email and through their website.

B7. How do most customers book a charter boat fishing trip with you currently? B8. Out of the following options, which option best describes your current booking process?
Asked of all licence holders, n=100.

Business Operations - Booking Process by Business Model

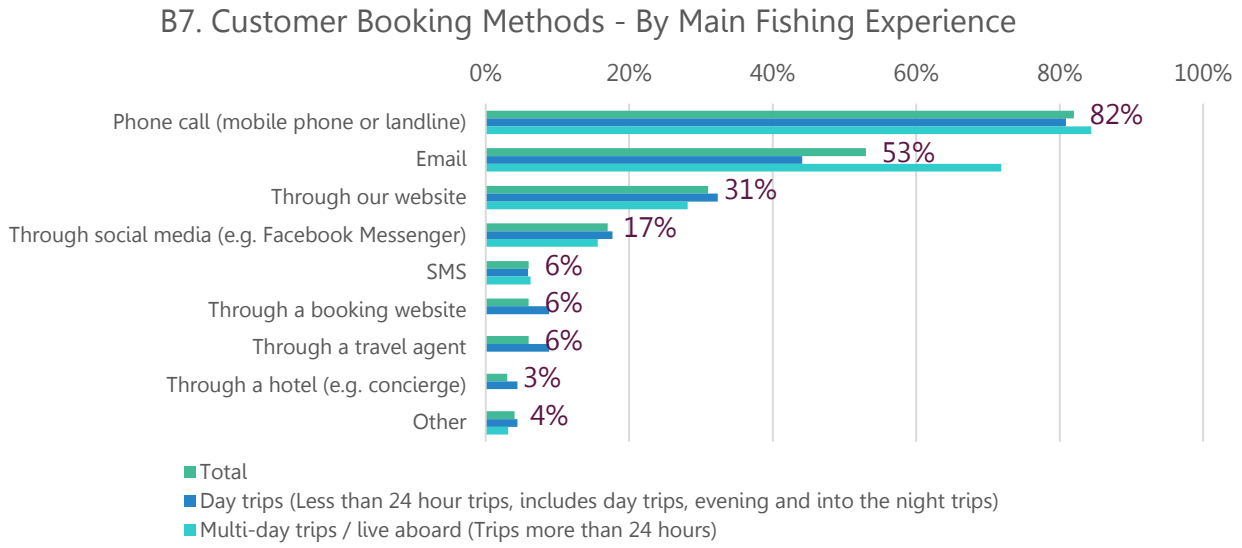


The payment methods undertaken is consistent across all business models, with the majority taking some form of payment up-front.

Inshore businesses have a slightly higher incidence of taking the full payment for the trip on the day of the trip.

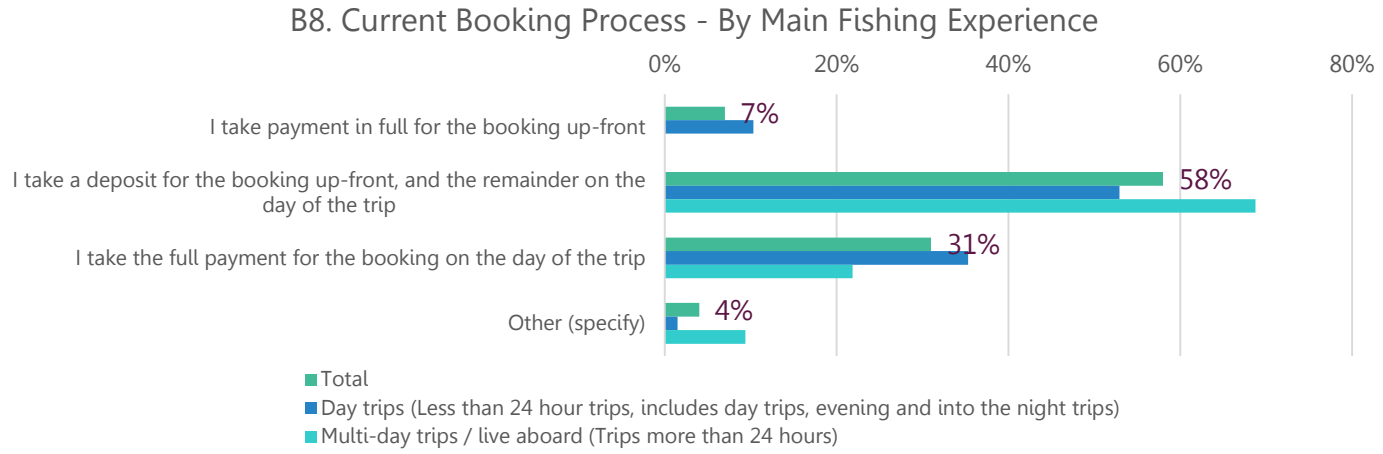
B7. How do most customers book a charter boat fishing trip with you currently? B8. Out of the following options, which option best describes your current booking process?
Asked of all licence holders, n=100.

Business Operations - Booking Process by Total & Main Fishing Experience



The majority of operators take customer booking via phone call (82%), email (53%) or through the operators' website (31%).

Multi-day operators have a high tendency compared with day-trip operators to book customers via email.

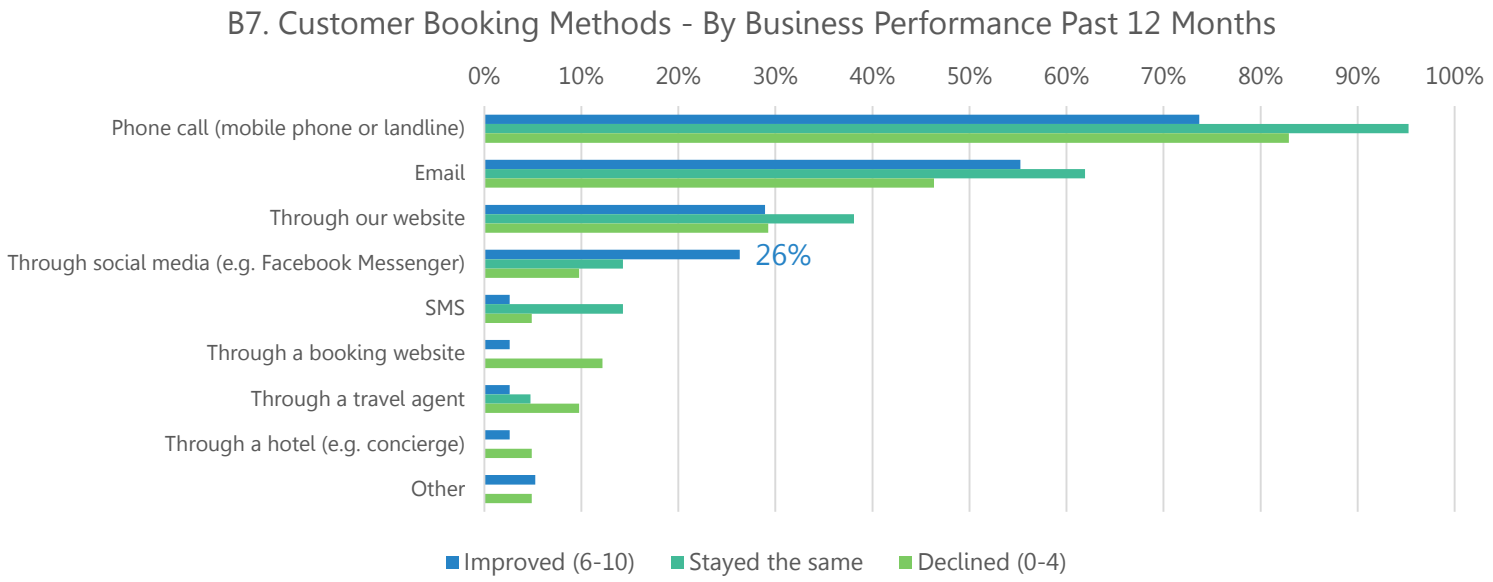


The majority of operators (58%) take a deposit for the booking up-front and the remainder on the day of the trip, or full payment for the booking on the day of the trip (31%).

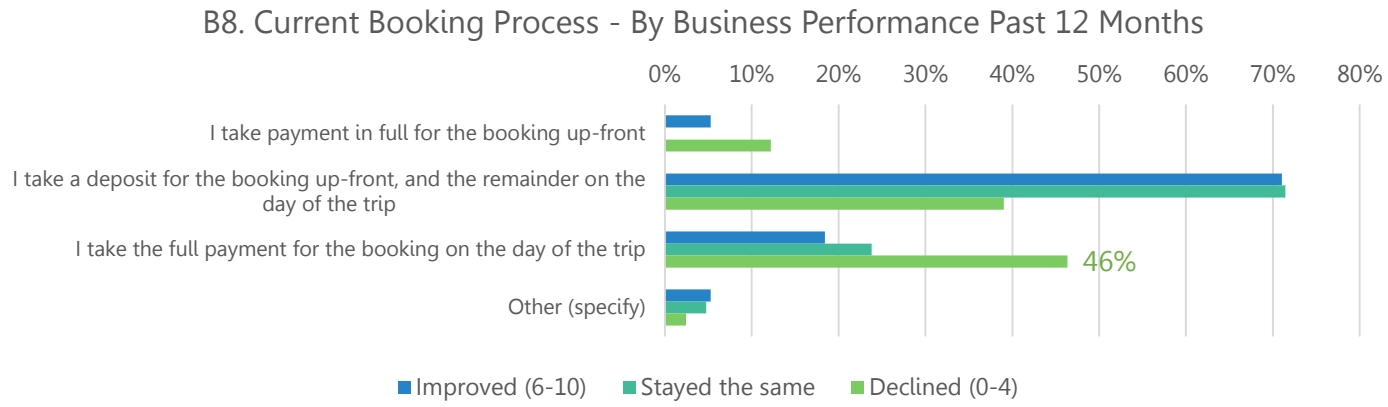
Day-trip operators have a higher tendency to take full payment for the booking on the day of the trip itself.

B7. How do most customers book a charter boat fishing trip with you currently? B8. Out of the following options, which option best describes your current booking process?
Asked of all licence holders, n=100.

Business Operations - Booking Process by Business Performance in the last 12 months



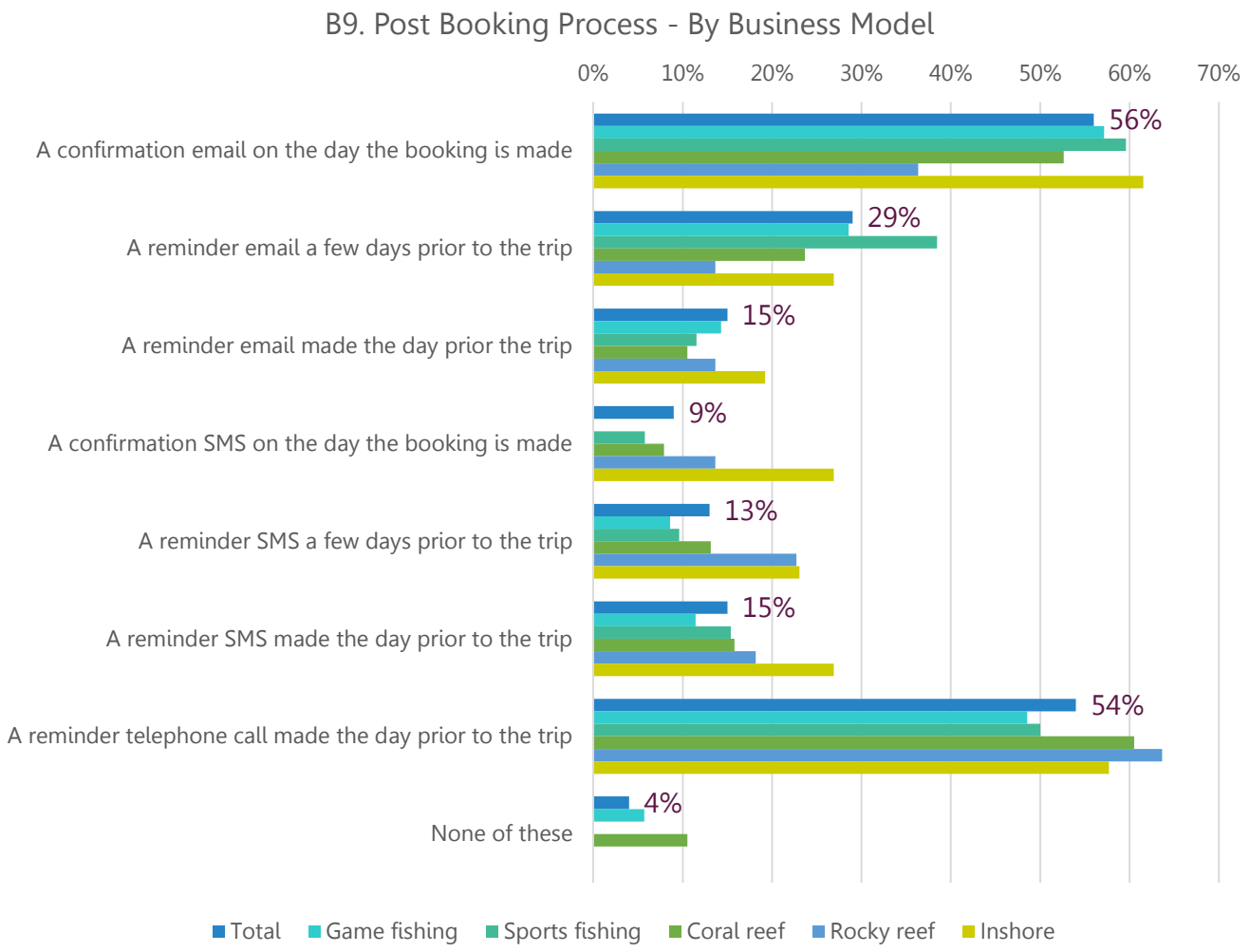
When viewing these results by business performance in the last 12 months, those whose business improved had a much higher tendency to take booking by social media (26%).



It is interesting to note that a much higher proportion of those operators whose business performance has declined in the last 12 months (46%) tend to take full payment on the day of the trip, rather than some form of deposit/full payment combination.

B7. How do most customers book a charter boat fishing trip with you currently? B8. Out of the following options, which option best describes your current booking process?
Asked of all licence holders, n=100.

Business Operations - Post Booking Services by Business Model

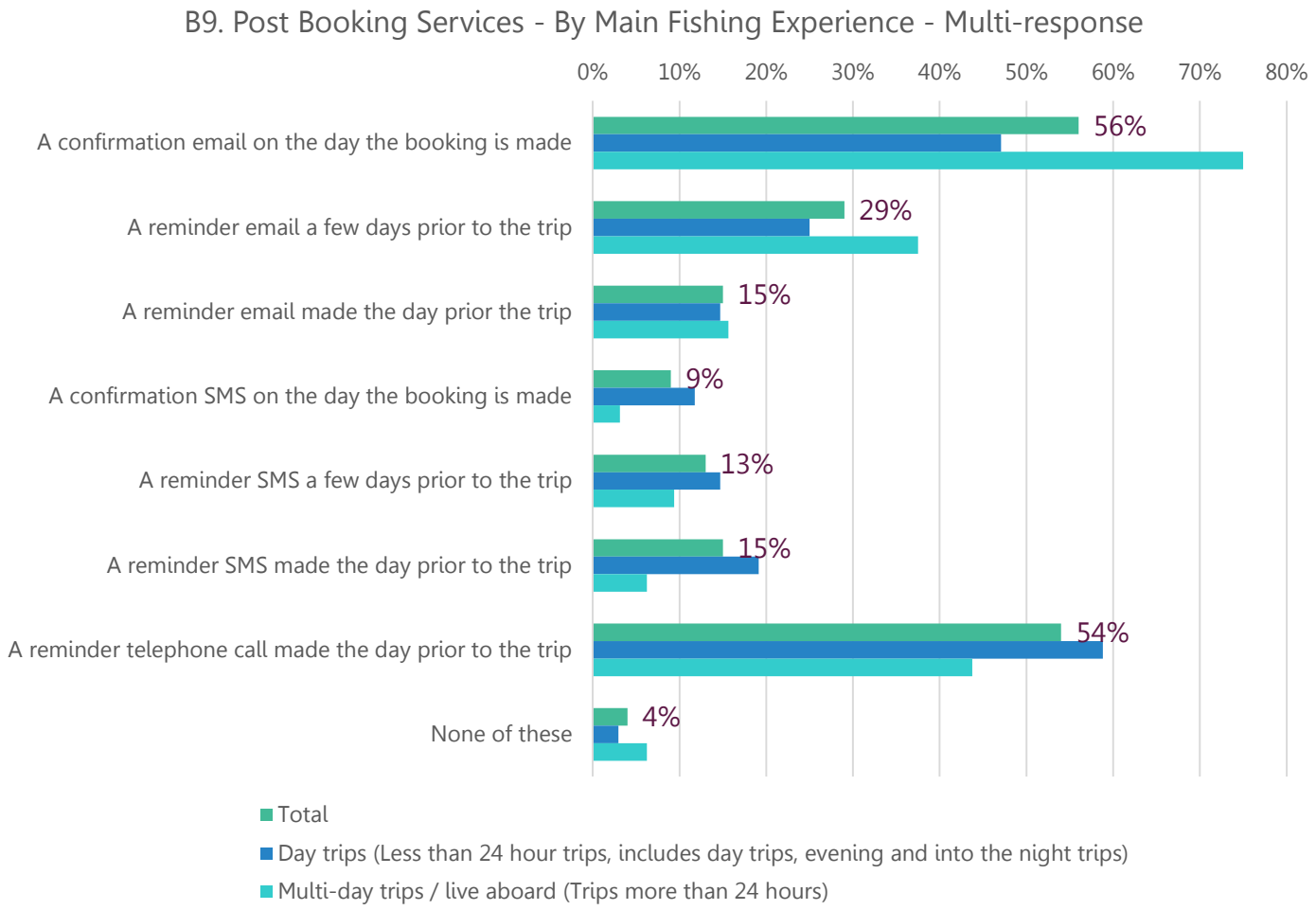


The majority of businesses are sending a confirmation email on the day the booking is made, and then undertaking a reminder call the day before the trip.

Rocky Reef businesses are less likely to be sending a confirmation email on the day the booking is made.

B9. Once a customer has made a booking, which of the following services do you offer? Select as many as apply to you.
Asked of all licence holders, n=100.

Business Operations - Post Booking Services by Total & Main Fishing Experience

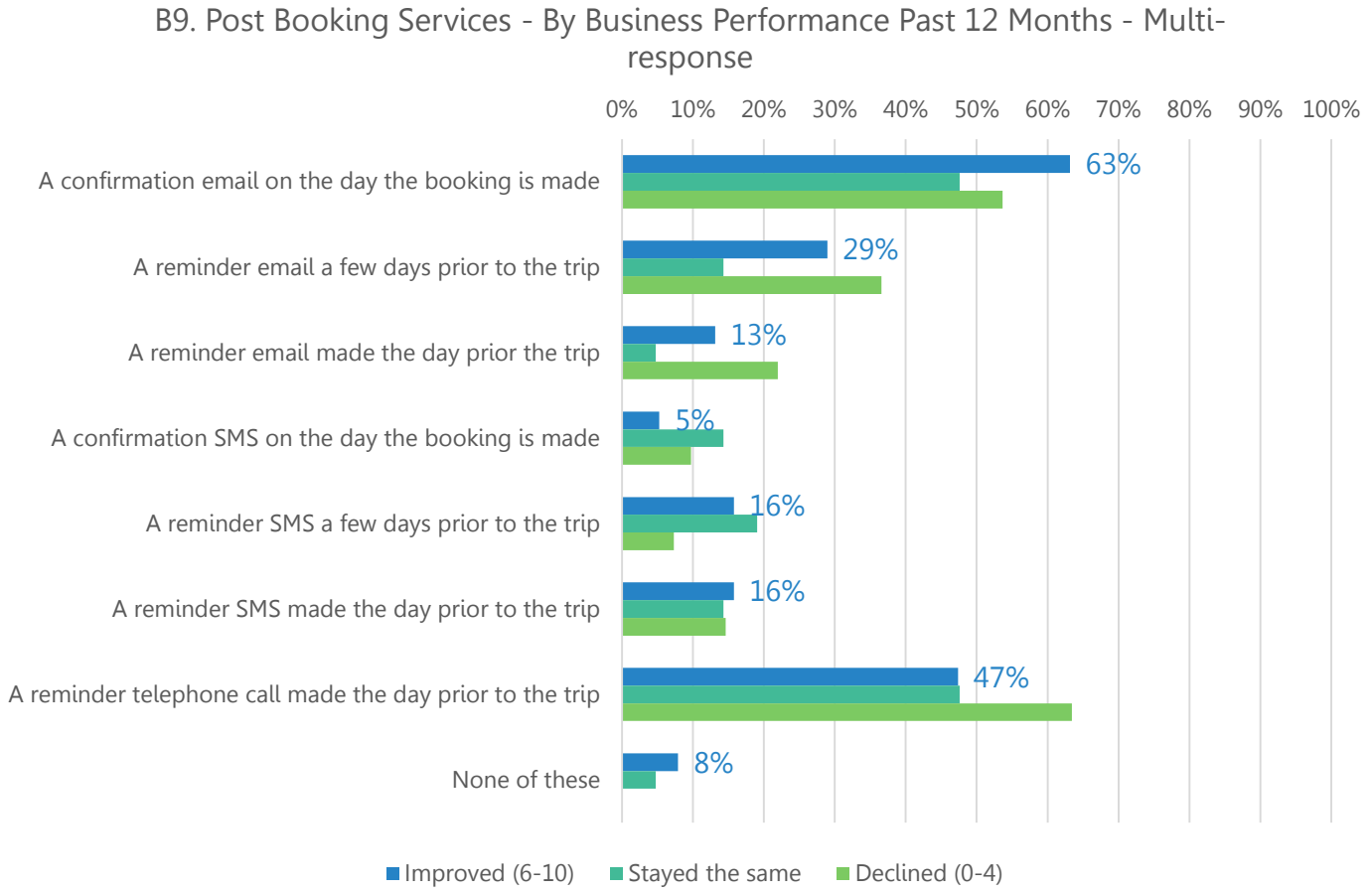


The majority of all operators will send a confirmation email on the day the booking is made (56%), which is especially true for multi-day operators.

The majority of operators will also make a reminder telephone call the day prior to the trip (54%), which is somewhat higher for day-trip operators. (Multi-trip operators will tend to send a reminder email a few days prior to the trip compared to a phone call).

B9. Once a customer has made a booking, which of the following services do you offer? Select as many as apply to you.
Asked of all licence holders, n=100.

Business Operations - Post Booking Services by Business Performance in the last 12 months

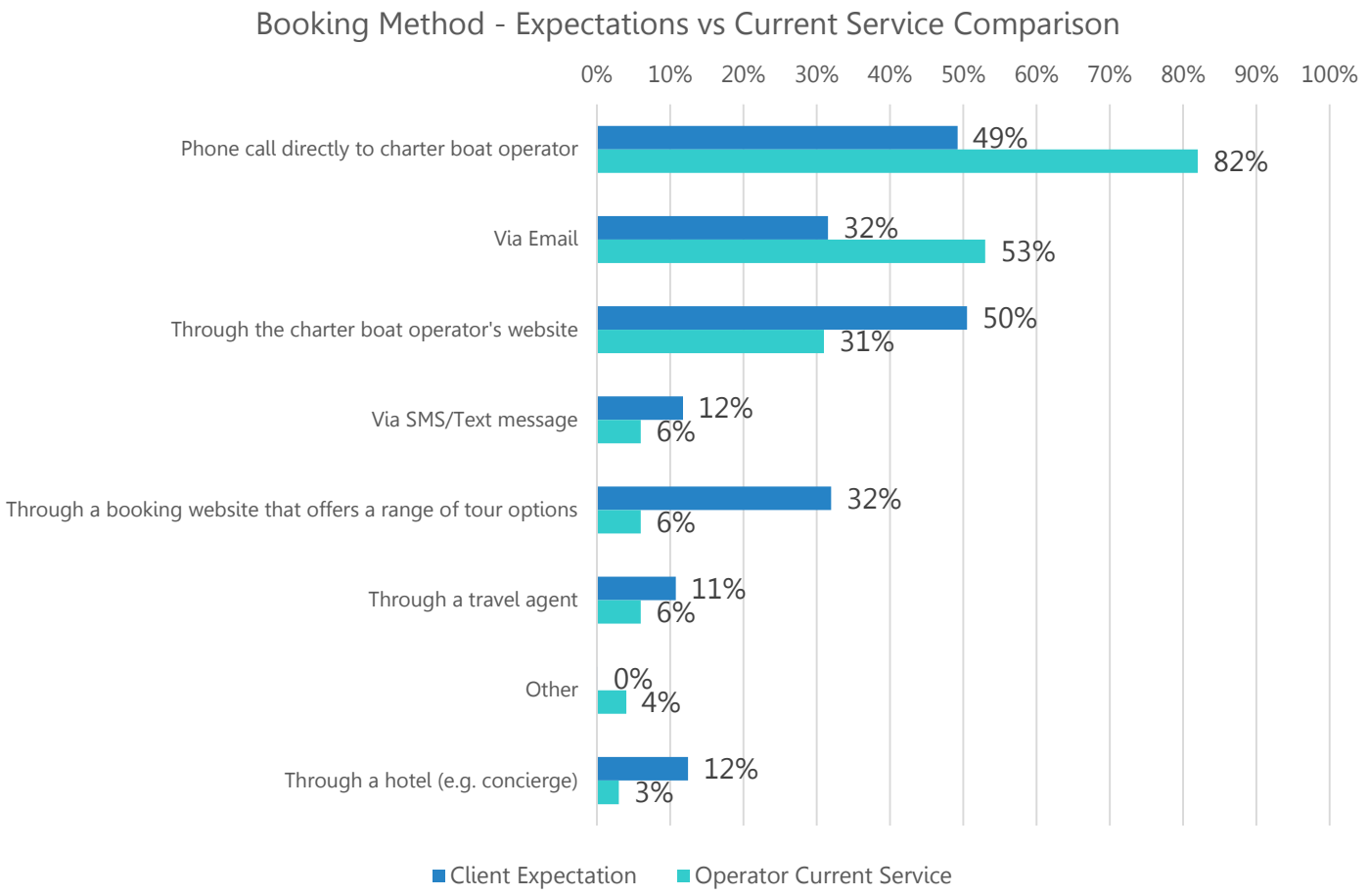


When viewing these results by business performance in the last 12 months, those whose business has either stayed the same or declined tend to have a lower proportion of operators who send a confirmation email on the day of the booking.

Those operators whose business has declined in the last 12 months also tend to rely on reminders closer to the time of the trip (either by email or telephone) rather than relying on confirmations at the time of the booking.

B9. Once a customer has made a booking, which of the following services do you offer? Select as many as apply to you.
Asked of all licence holders, n=100.

Client Expectations vs Business Operations: Booking Methods

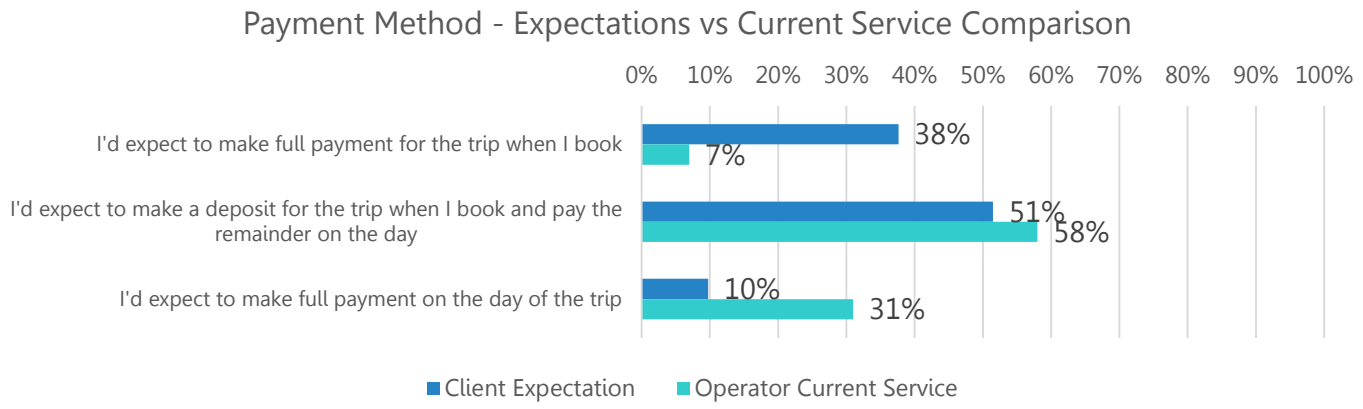


When comparing the operator survey results with the client survey results on booking methods, operators are exceeding service expectation on phone calls and email communication.

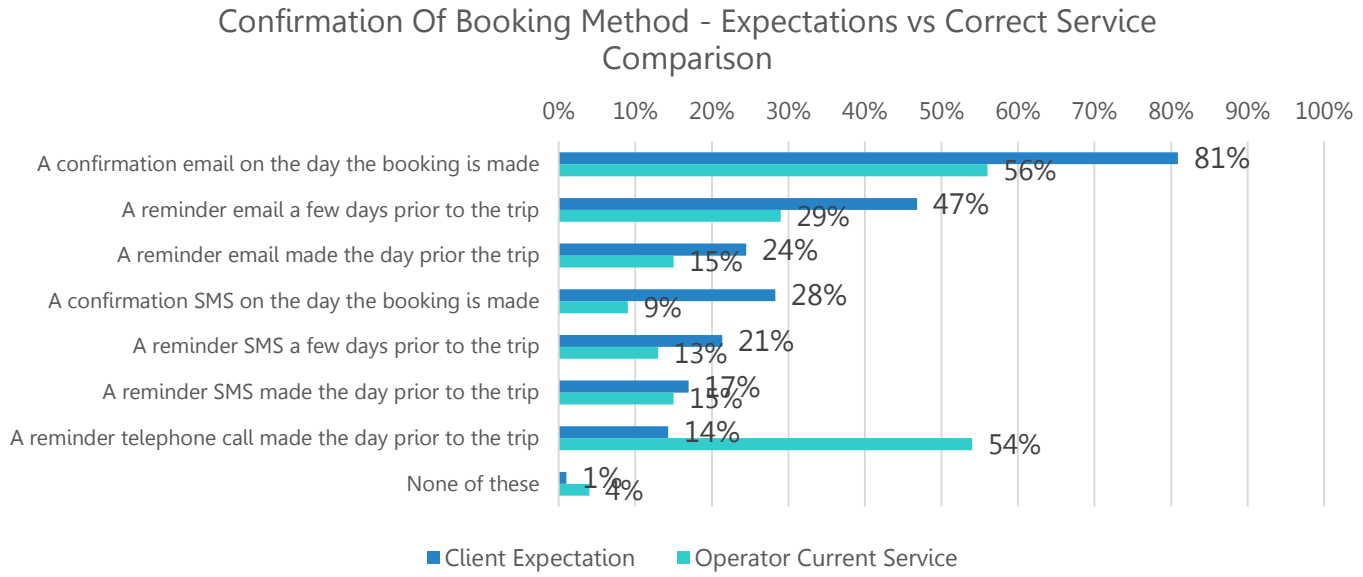
However, the majority of clients (50%) would like an option to book through the charter boat operators website or through a booking website that offers a range of tour options (32%) – neither of which are being sufficiently provided by operators.

Booking Method Comparison – Client Survey vs Licence Holder Survey Outcomes
Asked of all clients, n=707 and all licence holders n=100.

Client Expectations vs Business Operations: Payment & Confirmation Methods



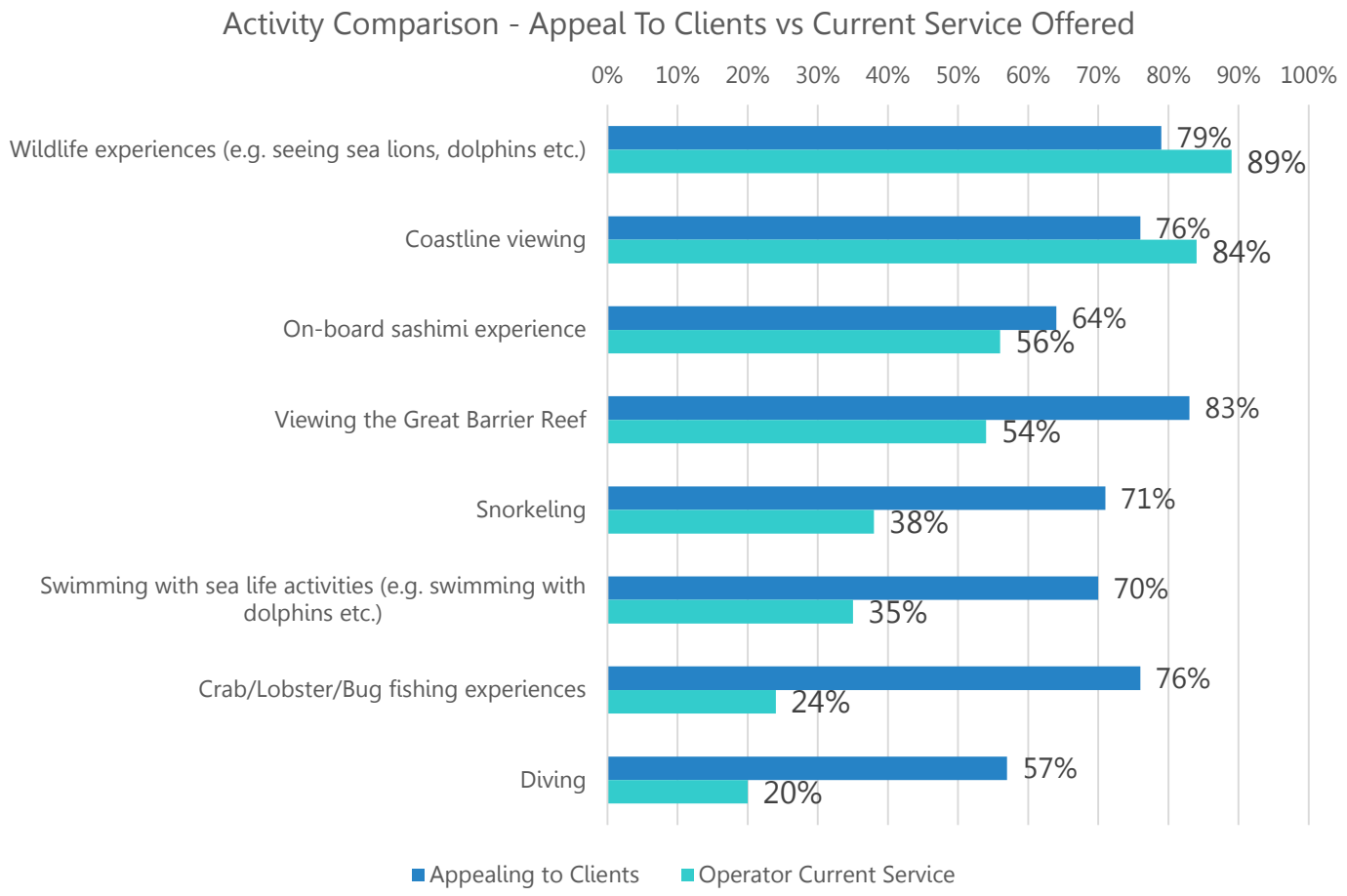
The majority of clients (51%) expect to pay a deposit at the time of booking and the remainder on the day, however 38% expect to make full payment upon booking (which only 7% of operators currently ask for).



The majority of clients (81%) would like a confirmation email at the time of booking, a reminder email a few days prior (47%) and/or the day prior (24%) as well as an SMS confirmation on the day the booking is made (28%). Operators are not exceeding customer expectations on any of these services.

Confirming of Booking Method Comparison – Client Survey vs Licence Holder Survey Outcomes
Asked of all clients, n=707 and all licence holders n=100.

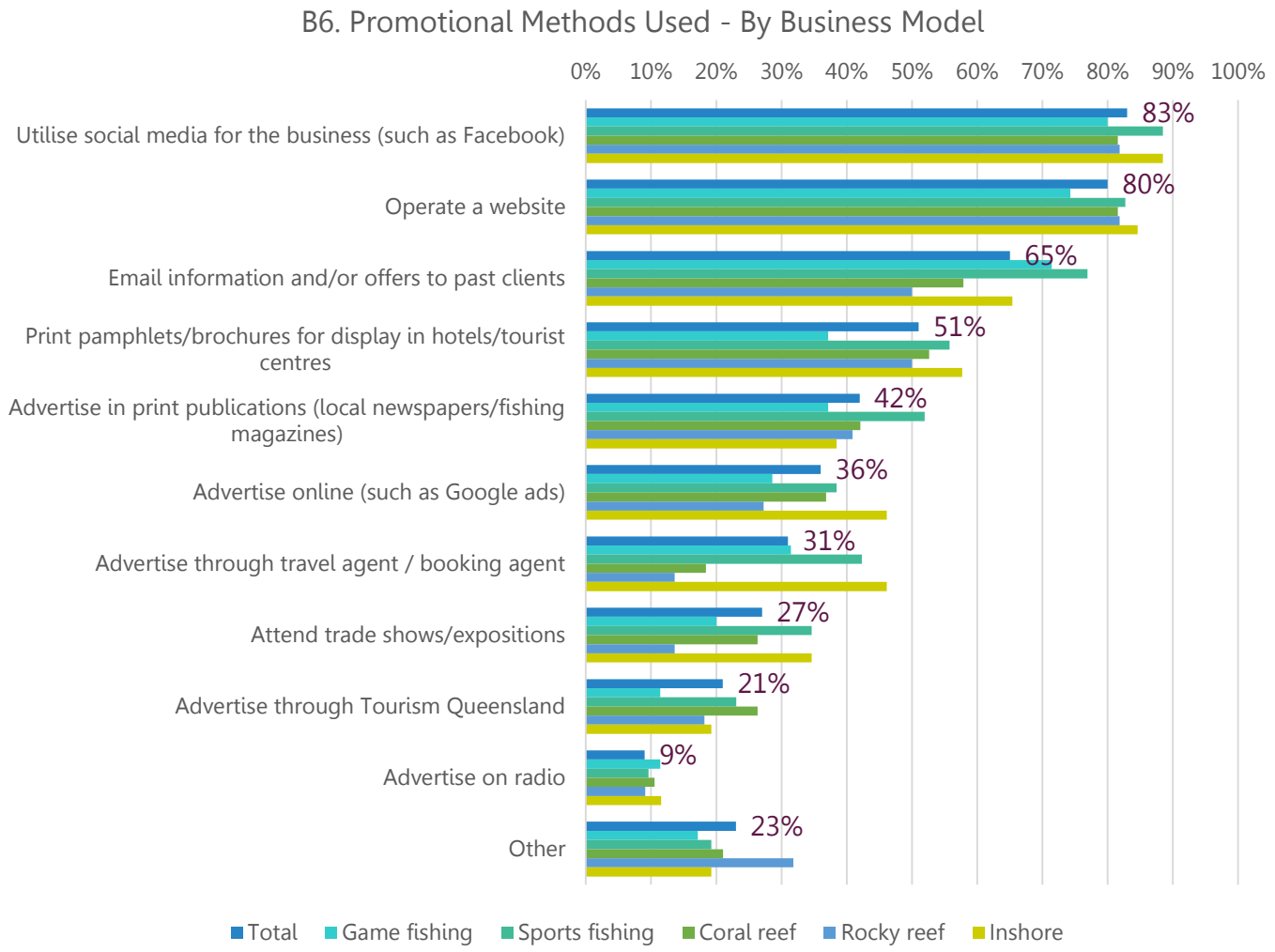
Client Expectations vs Business Operations: Activities list



While most operators are offering wildlife experiences (89%) and/or coastline viewing (84%) as additional activities to the charter fishing experience, many clients are much more interested in additional activities such as viewing the Great Barrier Reef (83%), Crab/Lobster/Bug fishing experiences (76%), snorkelling (71%) and/or swimming with sea life activities (70%) compared with what activities are currently offered by charter boat operators.

Activity Comparison – Client Survey vs Licence Holder Survey Outcomes
Asked of all clients, n=707 and all licence holders n=100.

Marketing & Promotion – Methods by Business Model

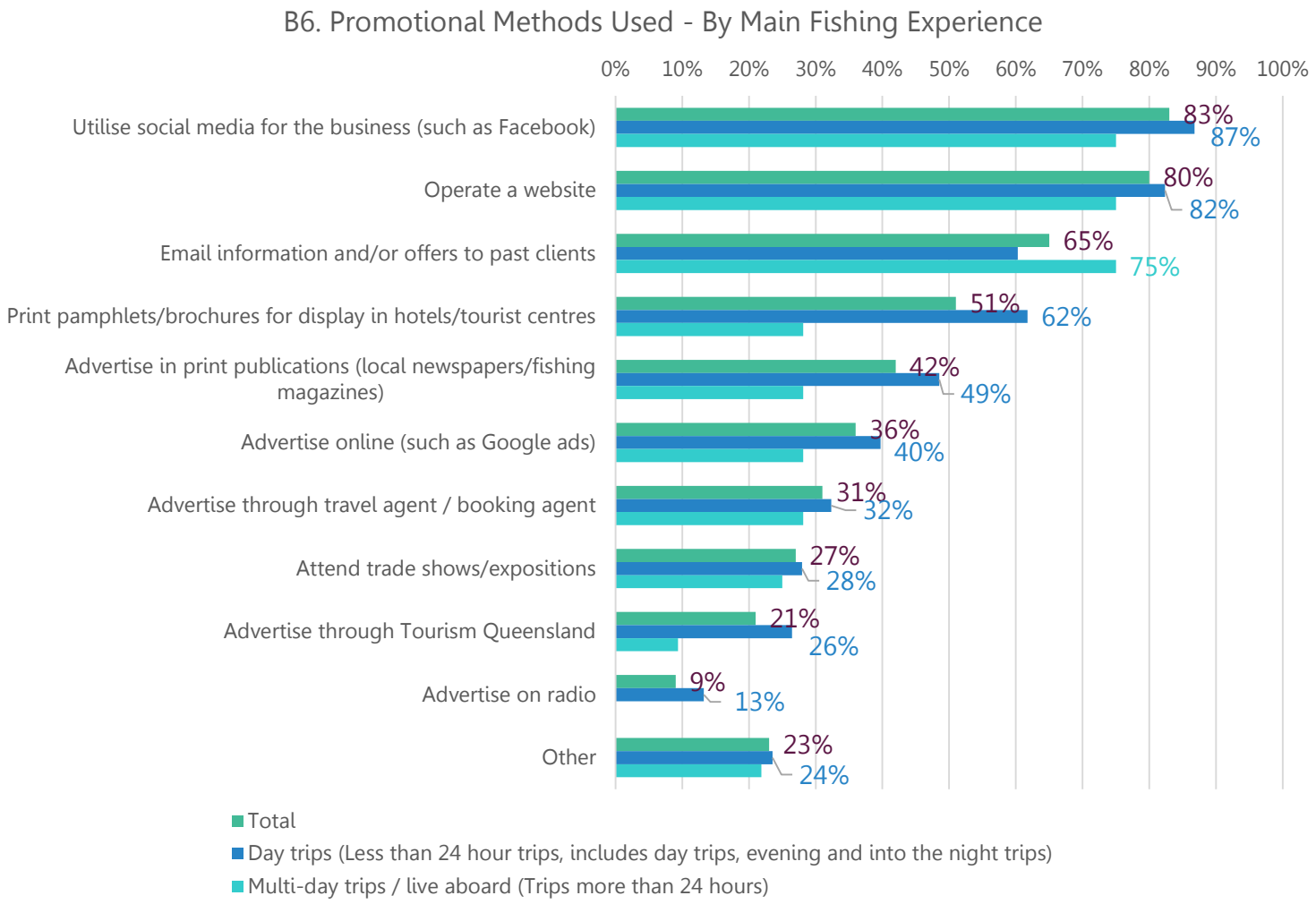


Over 50% of all business models are undertaking the following promotional methods:

- Utilise social media for the business (method most used by all business models).
- Operate a website (second for all business models).
- Email information to past clients (third for all business models).
- Print pamphlets/brochures (done by all apart from Game Fishing businesses).

B6. Which of the following promotional methods do you use to attract customers to your business? Please select all that apply.
Asked of all licence holders, n=100.

Marketing & Promotion – Methods by Total & Main Fishing Experience

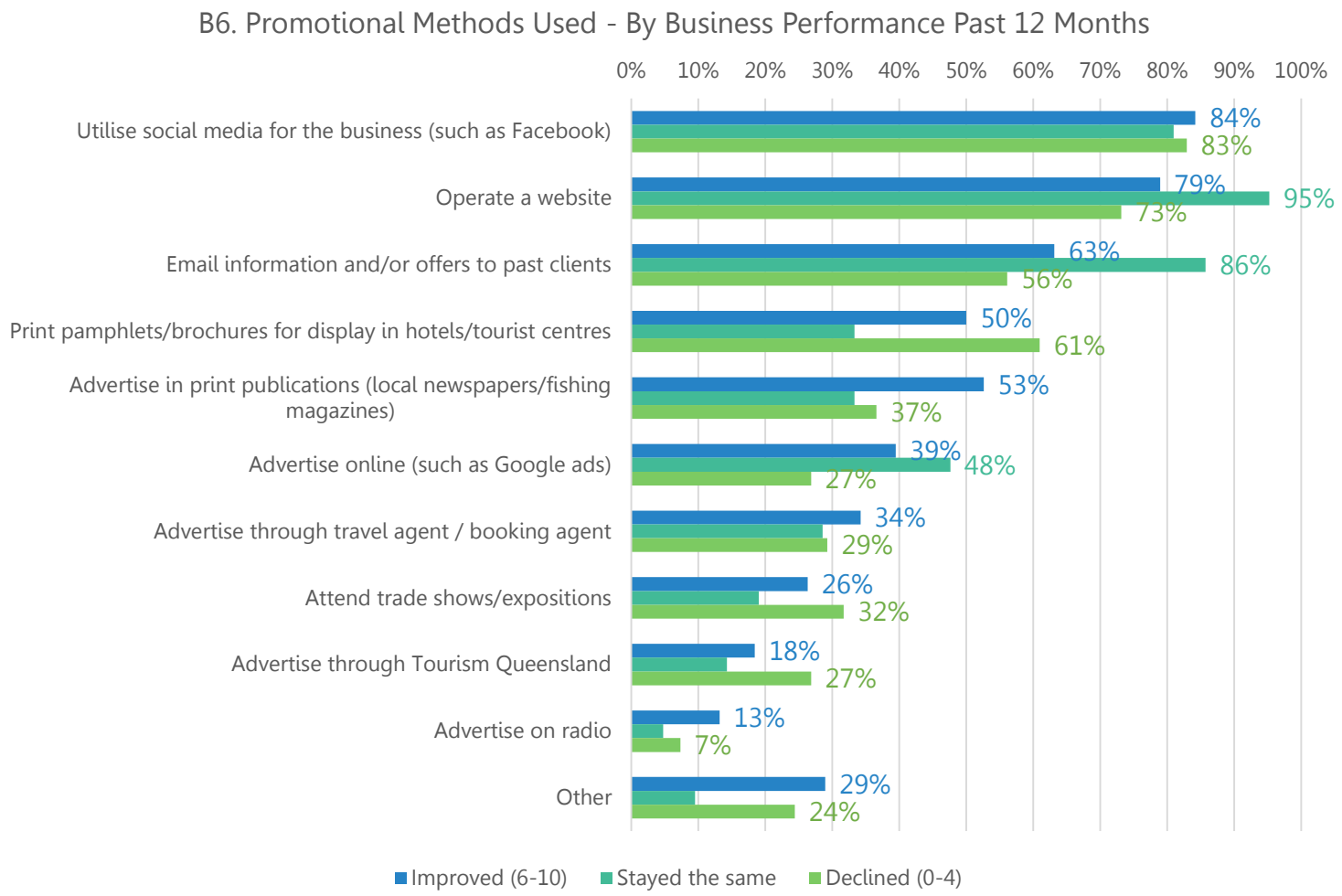


The majority of operators (83%) tend to market their businesses by utilising social media for the business (e.g., Facebook), followed by operating a website (80%).

These activities are slightly higher for day-trip operators whereas multi-day operators also tend to email information and offers to past clients (75%).

B6. Which of the following promotional methods do you use to attract customers to your business? Please select all that apply.
Asked of all licence holders, n=100.

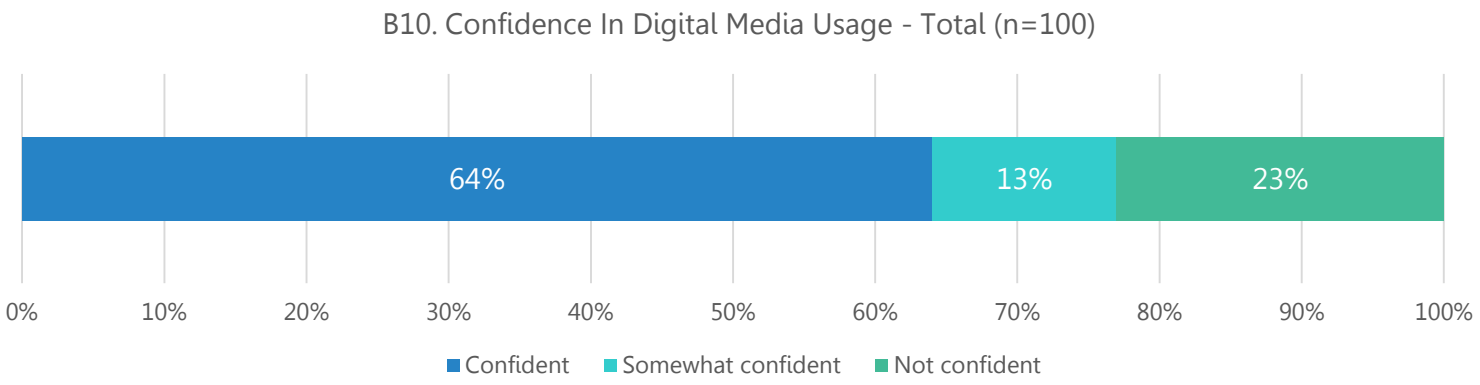
Marketing & Promotion – Methods by Business Performance in the last 12 months



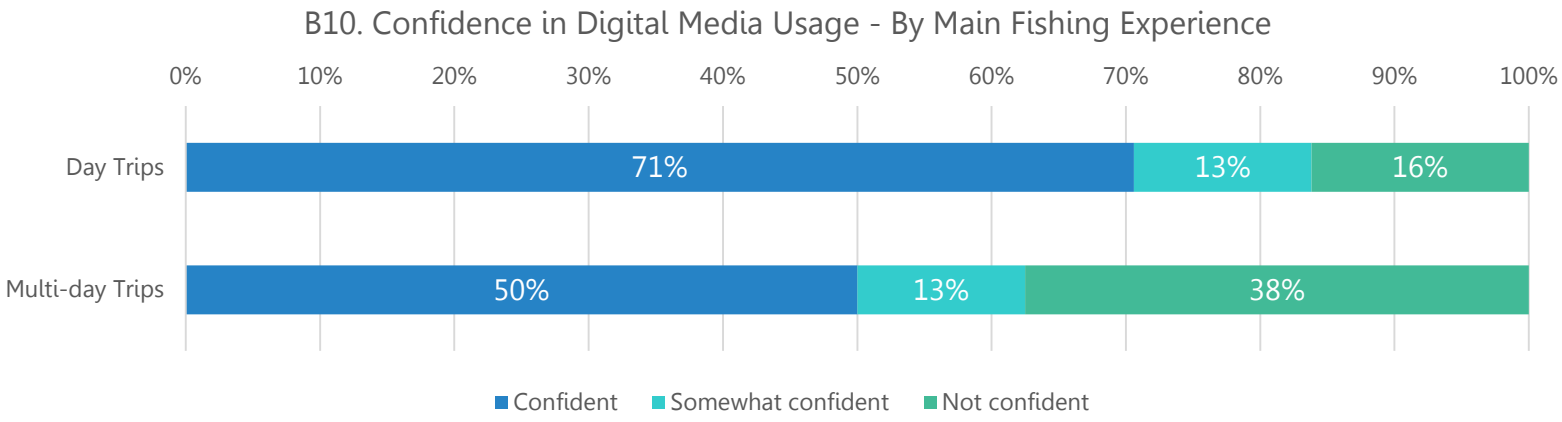
When viewing these results by business performance in the last 12 months, those operators whose business improved had a slightly higher proportion of operators who utilised social media. They also tended to advertise more in print publications such as local newspapers/fishing magazines (53%) or pamphlets/brochures for display in hotels/tourist centres (50%).

B6. Which of the following promotional methods do you use to attract customers to your business? Please select all that apply.
Asked of all licence holders, n=100.

Marketing & Promotion – Confidence



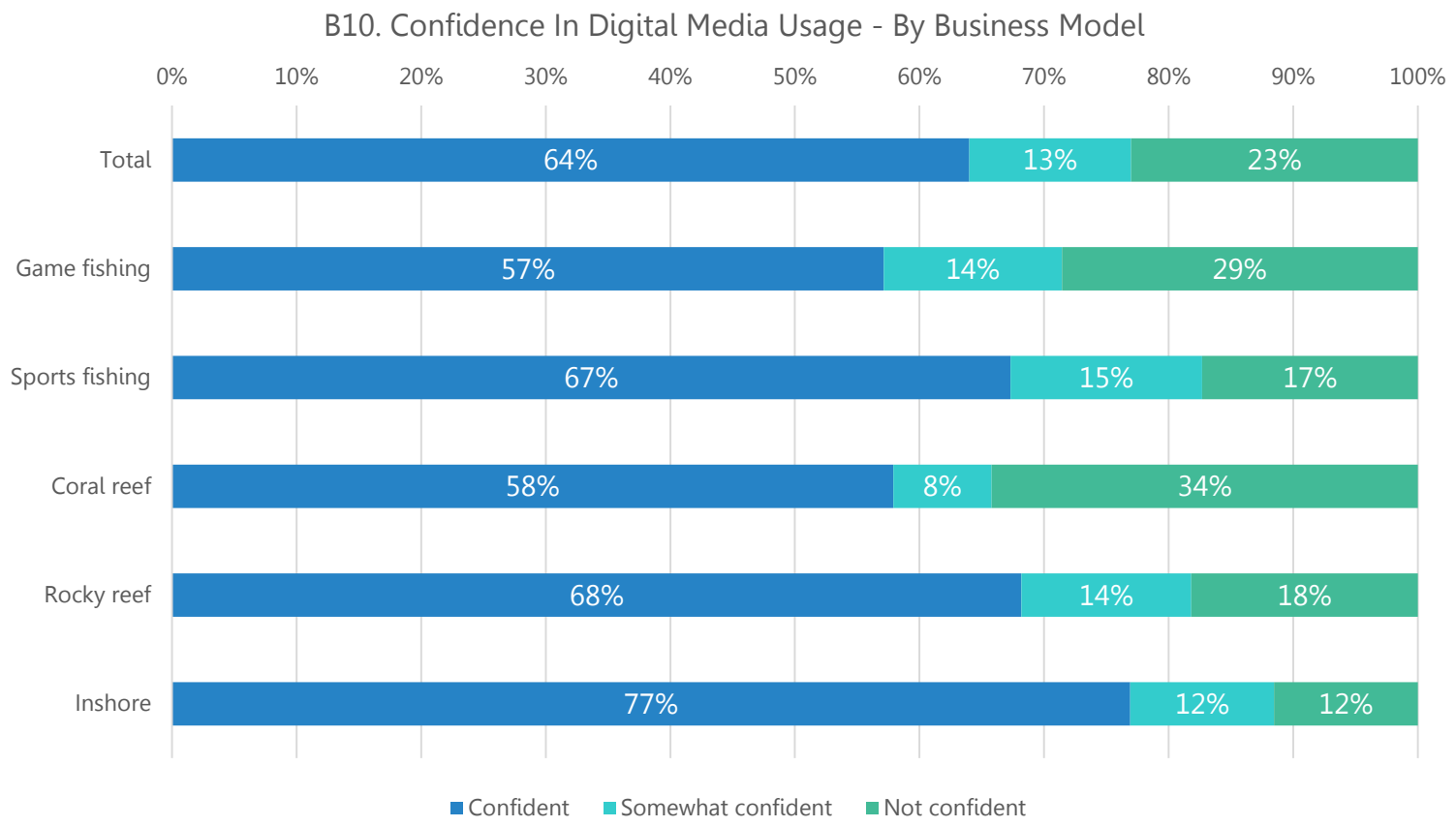
The majority of operators (64%) feel confident using digital media but just under a quarter (23%) do not.



Day-trip operators tend to feel more confident using digital media (71%), while multi-day operators have a higher number of operators who do not feel confident using digital media (38%).

B10. How confident are you in using digital media to promote and attract customers to your business, such as using social media, online advertising, using booking websites, and customer review sites?
Asked of all licence holders, n=100, Confident are those who rated 6, 7, 8, 9 or 10, Somewhat confident are those who rated 5, Not confident are those who rated 0, 1, 2, 3, 4.

Marketing & Promotion – Confidence (cont'd)

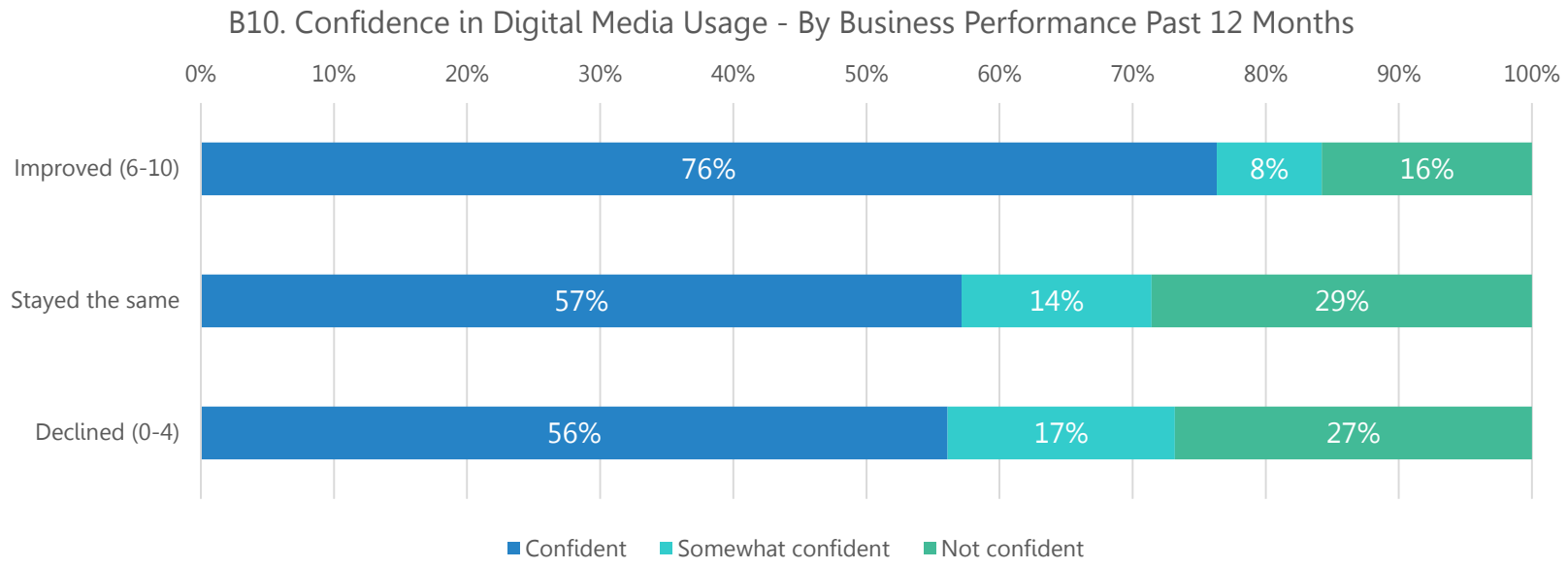


Confidence in using digital media is highest among the Inshore businesses (77%), followed by Rocky Reef (68%) and Sports Fishing (67%) businesses.

Confidence is lower among the Game Fishing (57%) and Coral Reef (58%) businesses.

B10. How confident are you in using digital media to promote and attract customers to your business, such as using social media, online advertising, using booking websites, and customer review sites?
Asked of all licence holders, n=100, Confident are those who rated 6, 7, 8, 9 or 10, Somewhat confident are those who rated 5, Not confident are those who rated 0, 1, 2, 3, 4.

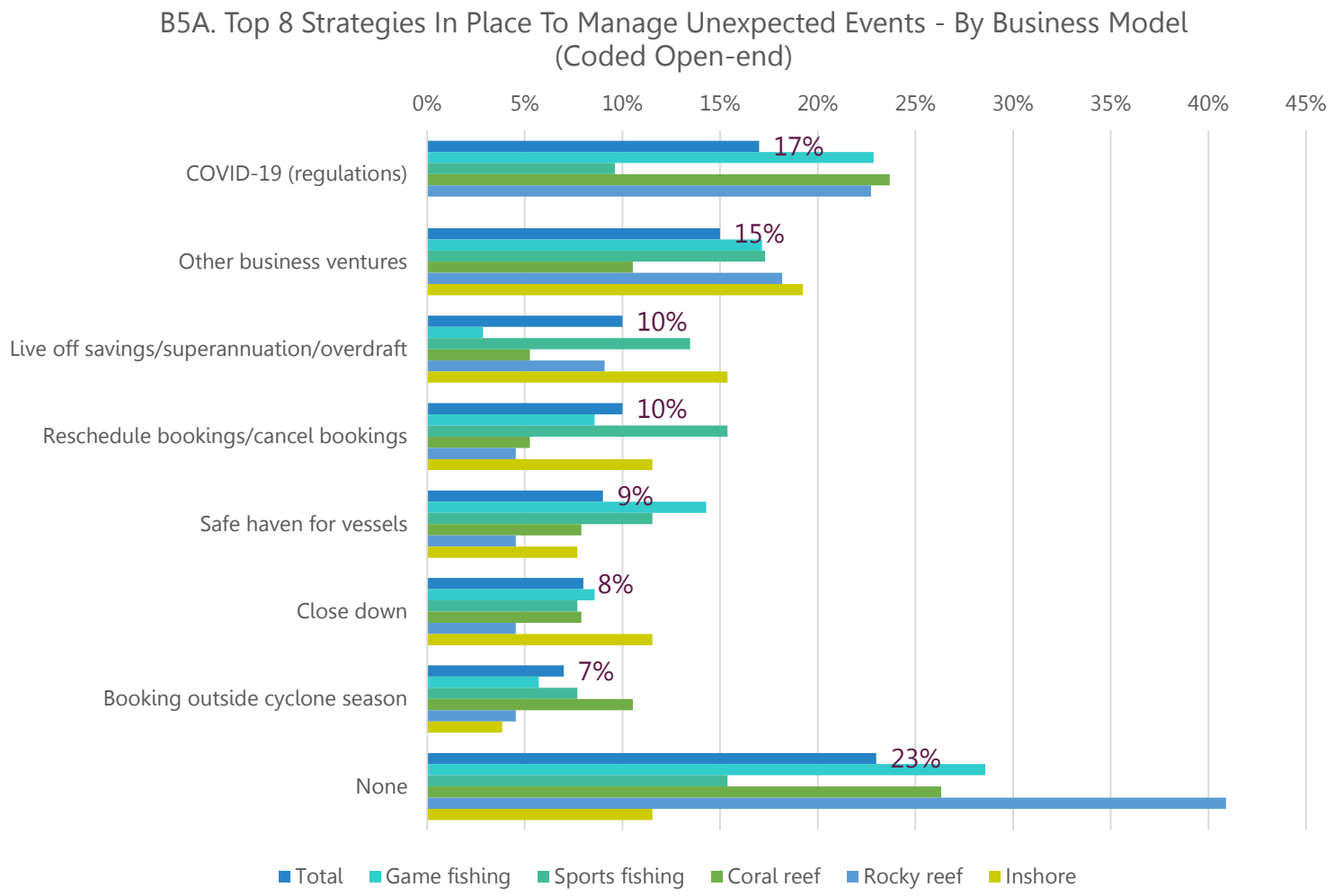
Marketing & Promotion – Confidence (cont'd)



There is a significant difference in reported confidence using digital media between those operators whose businesses improved in the last 12 months (76%) compared with those whose businesses stayed the same or declined.

B10. How confident are you in using digital media to promote and attract customers to your business, such as using social media, online advertising, using booking websites, and customer review sites?
Asked of all licence holders, n=100, Confident are those who rated 6, 7, 8, 9 or 10, Somewhat confident are those who rated 5, Not confident are those who rated 0, 1, 2, 3, 4.

Resilience – Response to Adverse Events by Total & Business Model



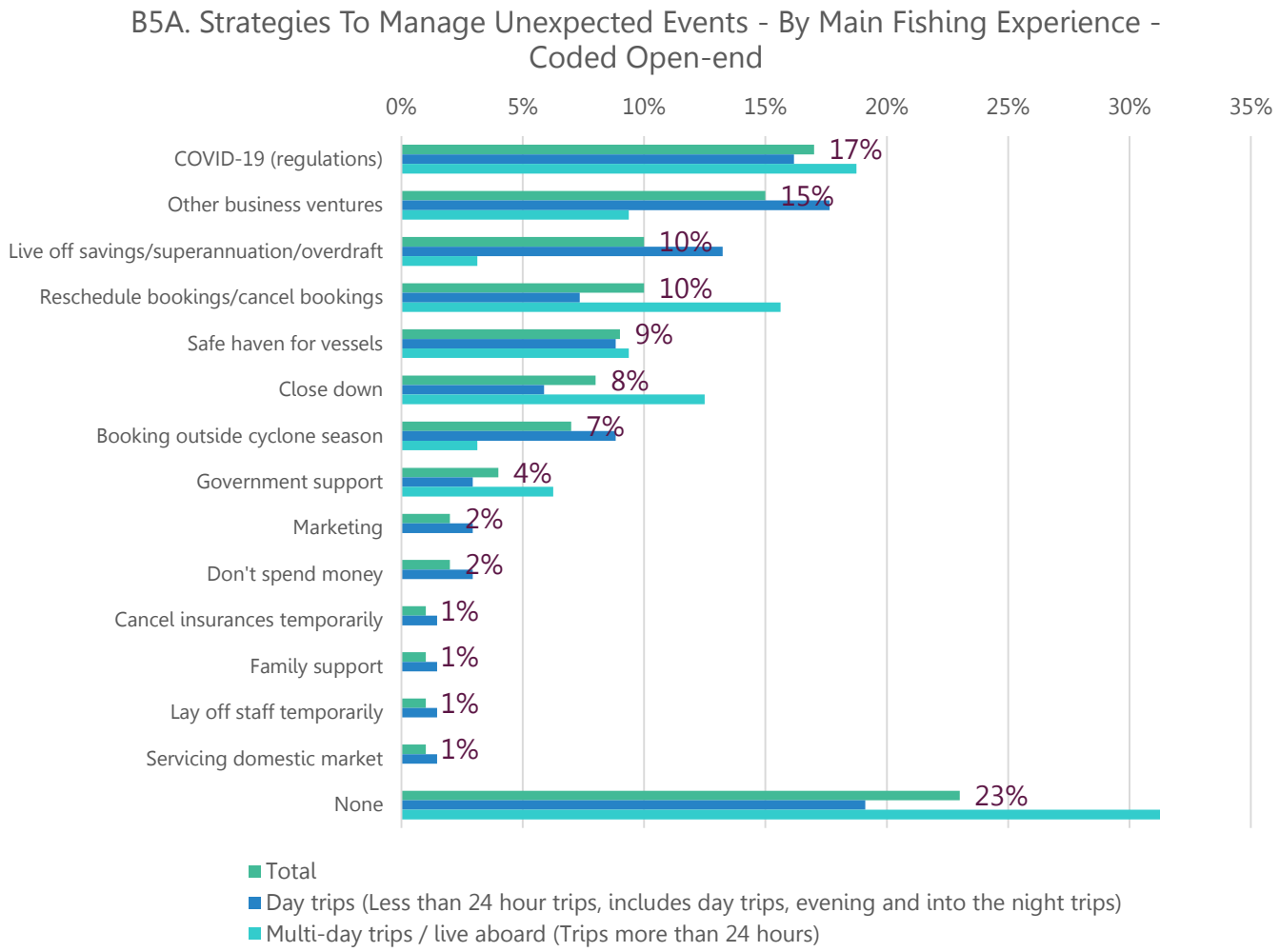
Game Fishing businesses tend to rely on other business ventures, and put their vessels in a safe haven during adverse events.

Sports Fishing and Inshore businesses will also tend to rely on other business ventures, and live off their savings/superannuation/overdrafts.

Rocky Reef businesses are more likely to not do anything specific during adverse events.

B5A. In the case of a severe weather event (e.g. cyclone), or an unexpected event such as the recent coronavirus epidemic, what strategies do you have in place to manage the potential impacts on your business?
Asked of all licence holders, n=100.

Resilience – Response to Adverse Events by Total & Main Fishing Experience

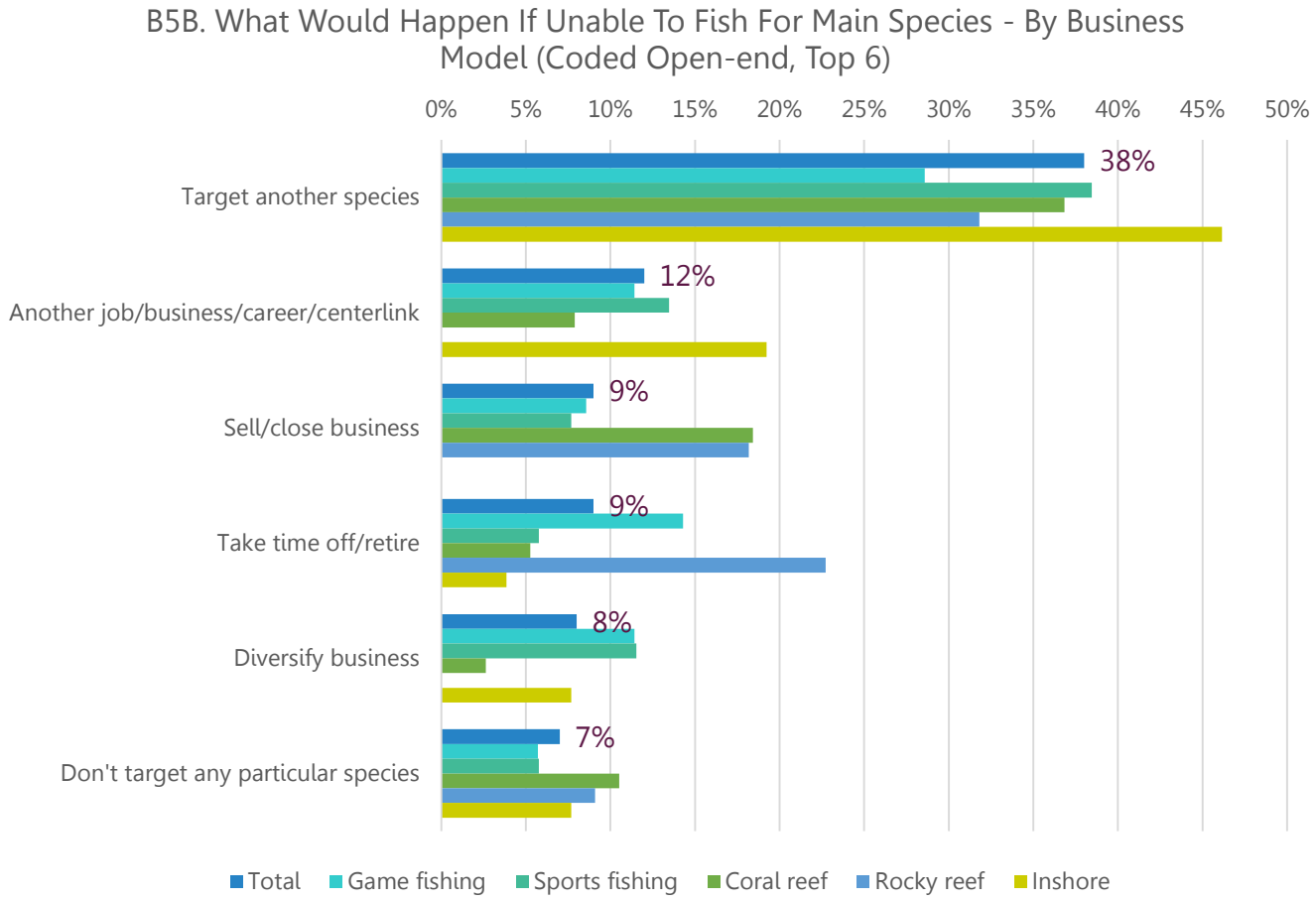


In the case of a severe weather event (e.g., a cyclone), or an unexpected event such as the recent coronavirus pandemic, operators will tend to rely on other business ventures (15%), live off savings, superannuation or overdraft (10%), or reschedule bookings/cancel bookings (10%) as strategies to manage.

Of those operators who commented on the impact of COVID-19 regulations (17%), these comments related to how this is just not something that could have been planned for and hence there was no strategy in place to be able to deal with this. Verbatims comments are provided on the next slide.

B5A. In the case of a severe weather event (e.g. cyclone), or an unexpected event such as the recent coronavirus epidemic, what strategies do you have in place to manage the potential impacts on your business?
Asked of all licence holders, n=100.

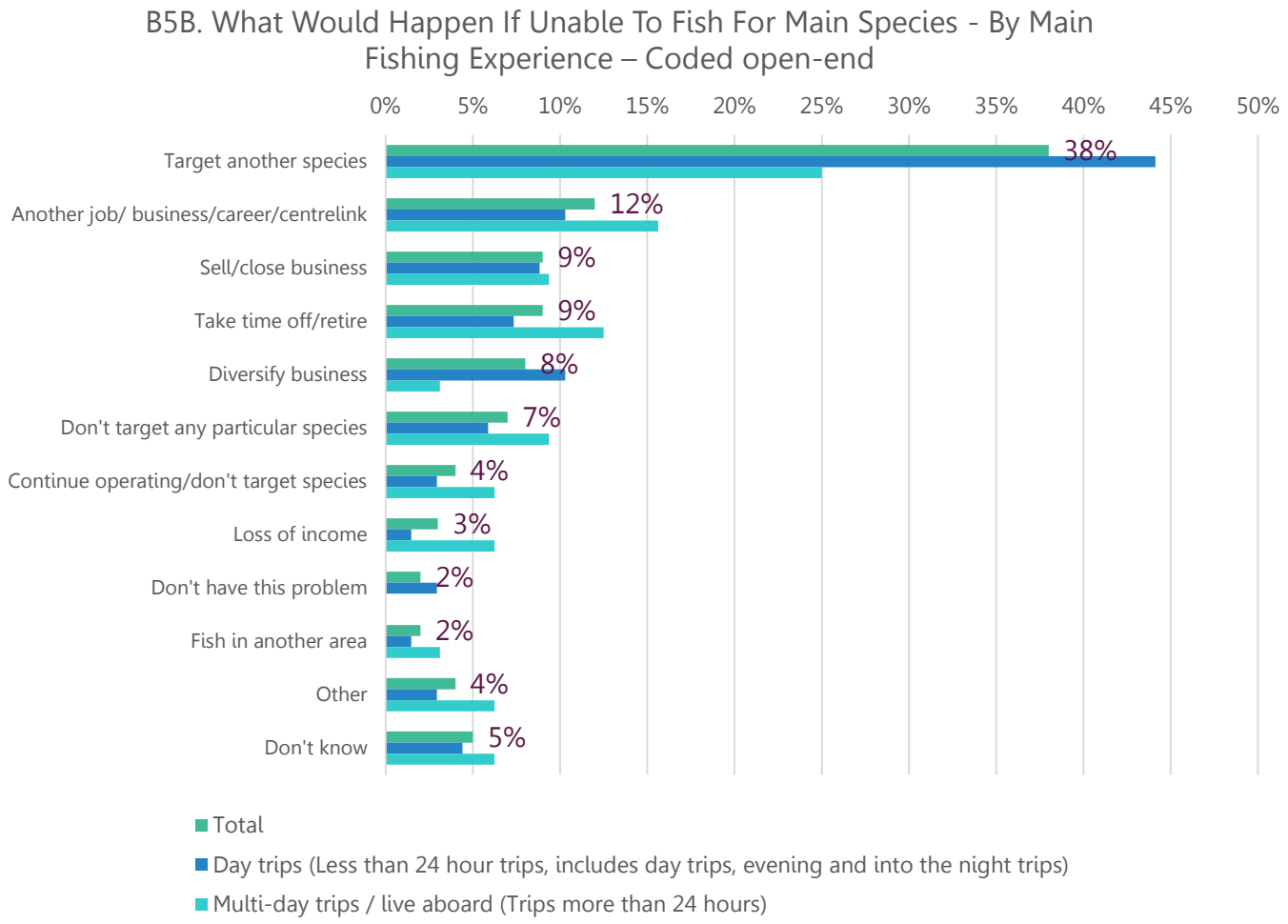
Resilience – Fish species issues by Total & Business Model



The result is similar across all business models, with most businesses intending to target another species, followed by businesses either looking to close their business, find another job/business to operate, or take time off/retire.

B5B. If you were unable to target your main fish species for some reason, what would you do?
Asked of all licence holders, n=100.

Resilience – Fish species issues by Total & Main Fishing Experience



In the event of not being able to target main fish species for some reasons, most operators would simply target another species (38%), look for another job or business (12%), or sell/close the business (9%).

Multi-day operators have a higher number of operators who would look for alternative work and/or take time off or retire.

Day-trip operators would more easily switch to another species, or diversify their business.

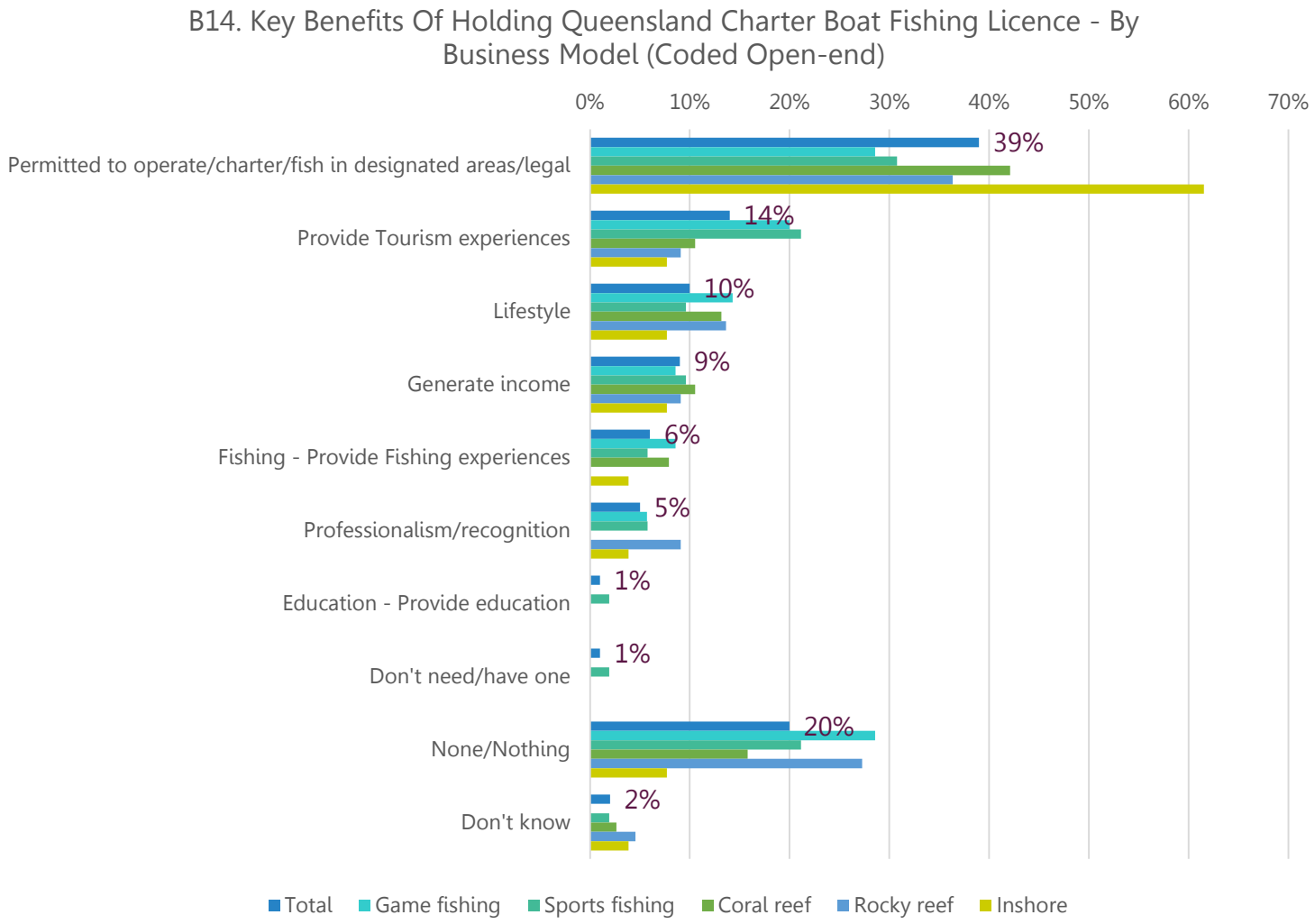
B5B. If you were unable to target your main fish species for some reason, what would you do?
Asked of all licence holders, n=100.

Resilience – Fish species issues by Business Performance in the last 12 months (selected verbatims)

Target another species	*We'd definitely mix it up. We move to other fishing species regularly.*	*I would have to target other fish or go reef fishing buy a bigger boat, otherwise I would go out of business.*	*Look for other opportunities with different species.*	*Try and adapt and target something else but at the same time many clientele have their heart set on targeting particular species and during closures for species I believe charter boats should be allowed to continue to take those species with the possibility of a reduced bag limit. Clients will not accept catching a fish they value highly and having to release it because it was caught in the wrong time of the year without any personal choice in the matter when they are outlaying significant money for that experience.*	*I currently have a 3-month closure for Barramundi now and I just deal with it and I keep fishing for other species.*
Another job/business/career/ Centrelink	*I would consider renewing my commercial fishing licence and go into commercial fishing.*	*I would look for other work. Inshore does not have any species issues and we are lucky where we live as the area where we fish has a marine netting closure.*	*Fortunately I am qualified in another area. So I'd leave the fishing charter industry.*	*Find another job which would be difficult in this economy now. You can't even drive cruise boats.*	*Go on the dole. Put in for the pension.*
Sell/close the business	*Sell the boat as I would not be able to operate.*	*It would put me out of business.*	*We wouldn't continue with the fishing charters.*	*Don't know, I think you would have to close up shop.*	*I would not operate.*

B5B. If you were unable to target your main fish species for some reason, what would you do?
Asked of all licence holders, n=100.

Industry as a whole – Benefits of holding Licence by Total & Business Model

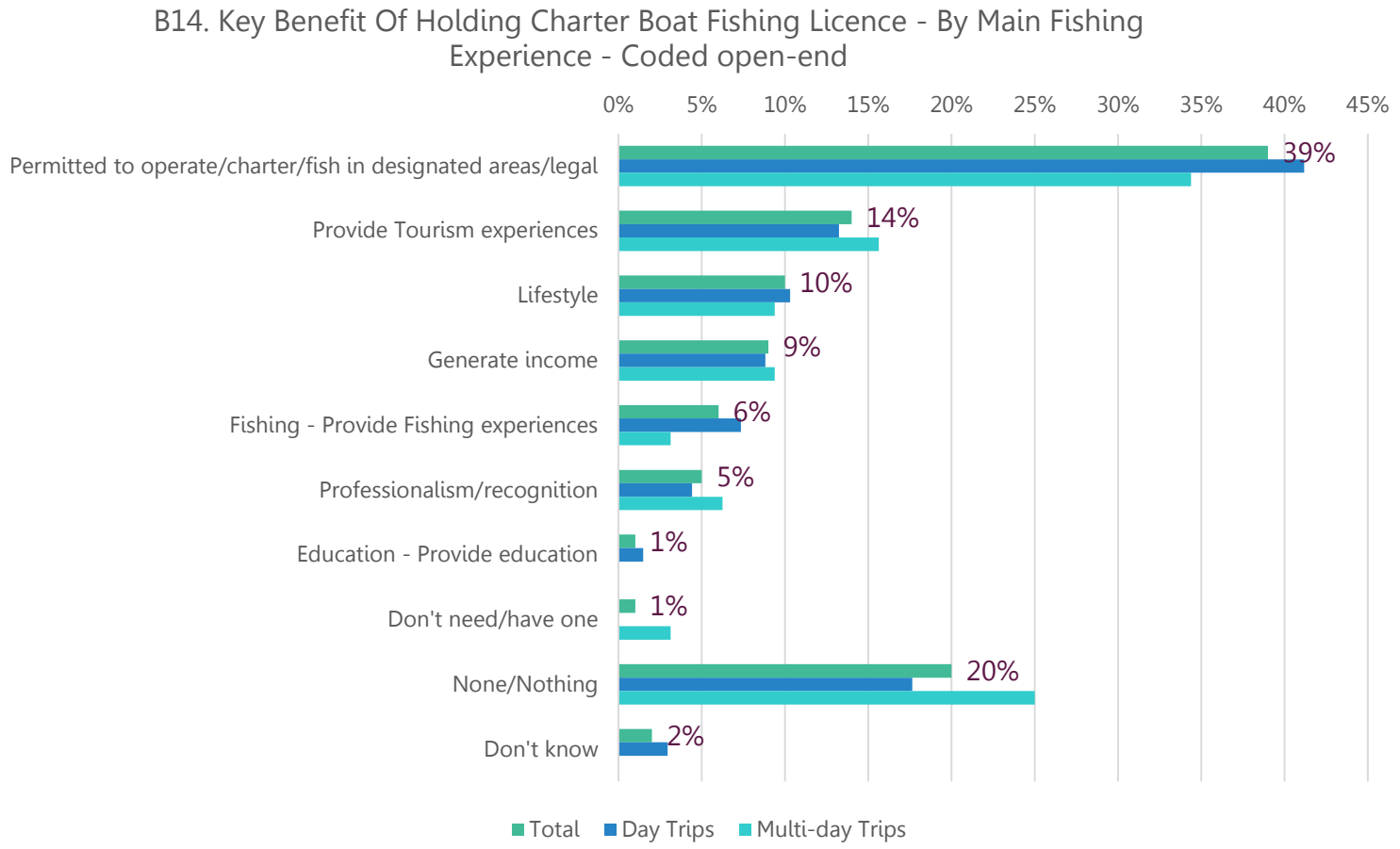


The key benefit across all business models of holding a licence is that it permits them to operate/charter/fish in designated areas.

Game Fishing and Sports Fishing businesses also perceive a key benefit being in being able to provide tourism experiences.

B14. What do you see as the key benefit to your business of holding a Queensland Charter Boat Fishing licence?
Asked of all licence holders, n=100.

Industry as a whole – Benefits of holding Licence by Total & Main Fishing Experience



Operators perceive the key benefit to holding a licence is that it permits them to operate/charter/fish in designated areas (39%).

14% also suggest a benefit of the licence is that it enables them to provide tourism experiences while 10% believe that it provides a nice lifestyle.

20% of operators don't believe there is a benefit to holding their licence.

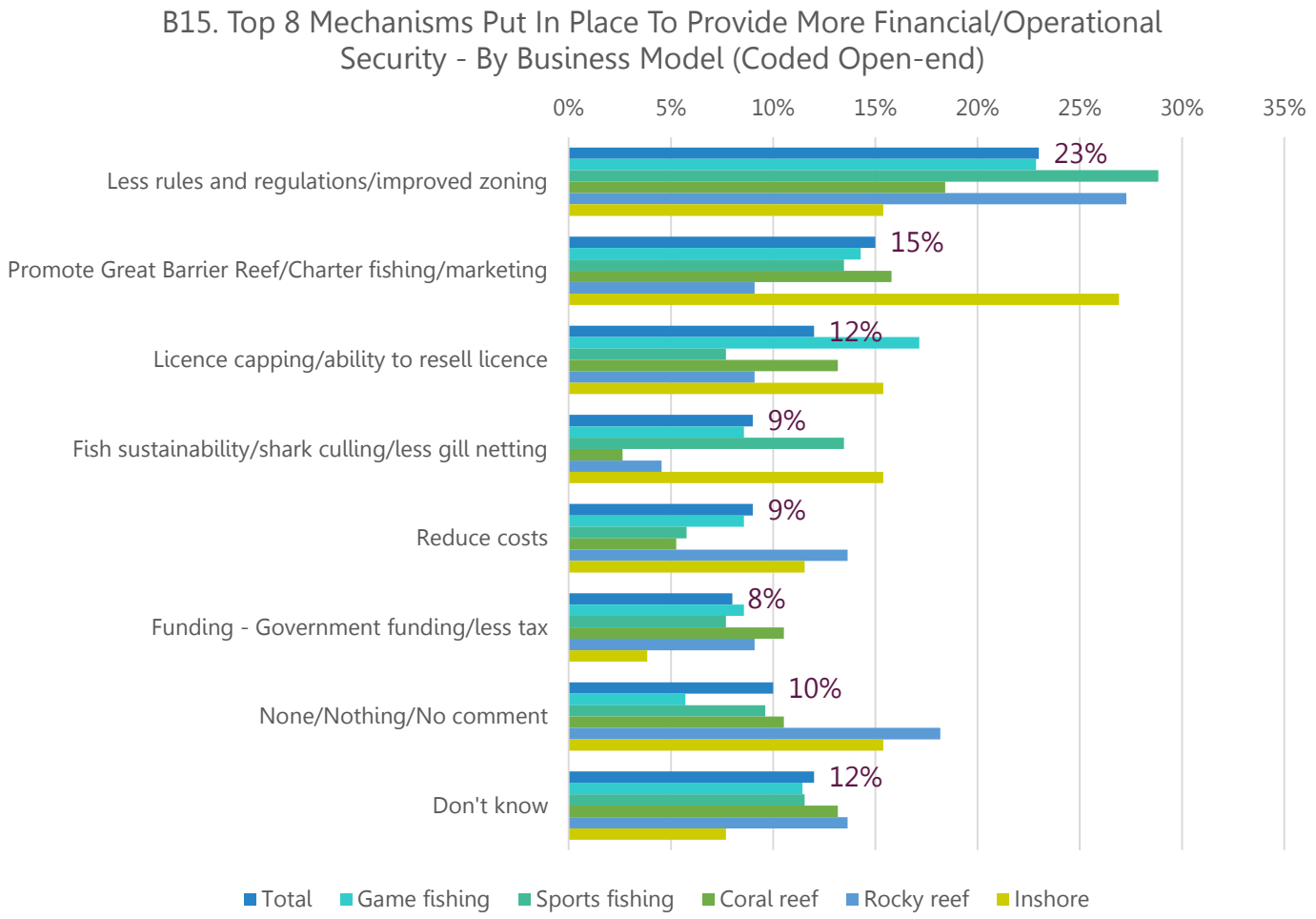
B14. What do you see as the key benefit to your business of holding a Queensland Charter Boat Fishing licence?
Asked of all licence holders, n=100.

Industry as a whole – Benefits of holding Licence by Business Performance in the last 12 months (selected verbatims)

Permitted to operate/ charter/ fish in designated areas/ legal	*It enables me to fish in the areas I need to fish in Queensland. I only fish in the Black Marlin season. It enables me to fish out of Cairns.*	*The location that we fish in. Because of how good the fishing is in the Harvey Bay/Offshore area.*	*The opportunity to run a business to provide for my family. To provide a highly qualified service to the public and you need to be skilled to do this.*	*The opportunity to be able to fish, the reef and experience the reef as a whole.*	*So I can do the business and carry on with the business. Without a licence you can't do it.*
Provide Tourism experiences	*To give people the experience of catching a Marlin or a fish species in Cairns that they cannot target in other places and also be able to show people our region and experience the Great Barrier Reef.*	*The number of tourist people that come through our town and enjoy the fishing experience and opportunities. PS Please check www.portdouglas.com.au the most comprehensive website/fishing business in far north Queensland and Queensland.*	*Ability to provide international clients with the experience of fishing and releasing giant Black Marlin on the Great Barrier Reef.*	*Being able to provide people with a great experience in special surroundings.*	*I am capitalising with tourism and providing a service for our little area or community.*
Lifestyle	*It is what we like to do and we enjoy the lifestyle it brings. It is what we have done all our working lives.*	*The lifestyle that it brings me and I love the outdoors. It is fun and it puts a smile on peoples faces.*	*The lifestyle it brings.*	*It is a way to make money and hold a good lifestyle.*	*It allows me to operate a charter in a job that I enjoy doing on a part-time basis.*

B14. What do you see as the key benefit to your business of holding a Queensland Charter Boat Fishing licence?
Asked of all licence holders, n=100.

Industry as a whole – What would provide more security? by Total & Business Model



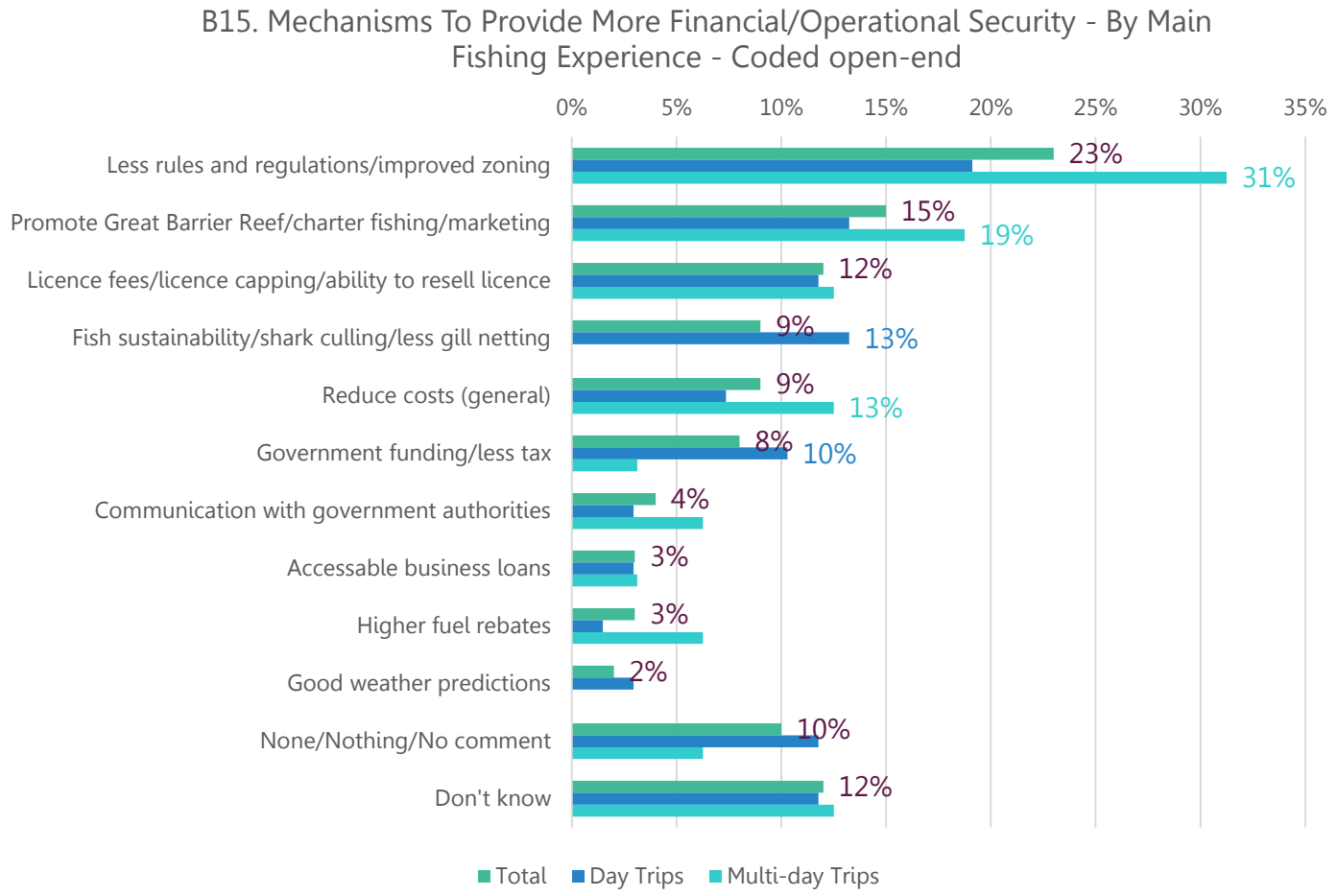
For most business models, the key mechanism to provide more financial/operational security relates to less rules and regulations/improved zoning.

Inshore businesses believe that promotion of the charter fishing industry will be the key mechanism to improve their financial/operational security. This is of secondary importance to all other business models.

Licence capping/ability to resell licence is a more important mechanism to the Game Fishing and Inshore businesses.

B15. What mechanisms could be put in place to provide you with more financial or operational security as a charter operator in Queensland?
Asked of all licence holders, n=100.

Industry as a whole – What would provide more security? by Total & Main Fishing Experience



The mechanisms that would provide operators with more financial/operational security include less regulations and zoning (23%) promoting the Great Barrier Reef and charter fishing in general (15%) and licence fees/capping and ability to resell (12%) - particularly for multi-day operators.

Day-trip operators would also like to see improved fish sustainability/shark culling and less gill netting, as well as reduced tax/increased funding.

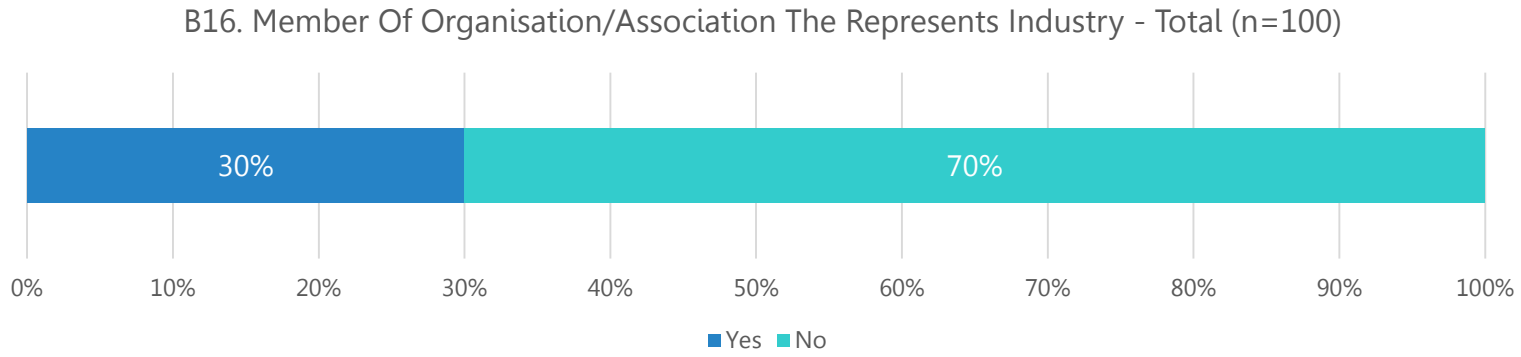
B15. What mechanisms could be put in place to provide you with more financial or operational security as a charter operator in Queensland?
Asked of all licence holders, n=100.

Industry as a whole – What would provide more security? Selected verbatims to top three suggestions.

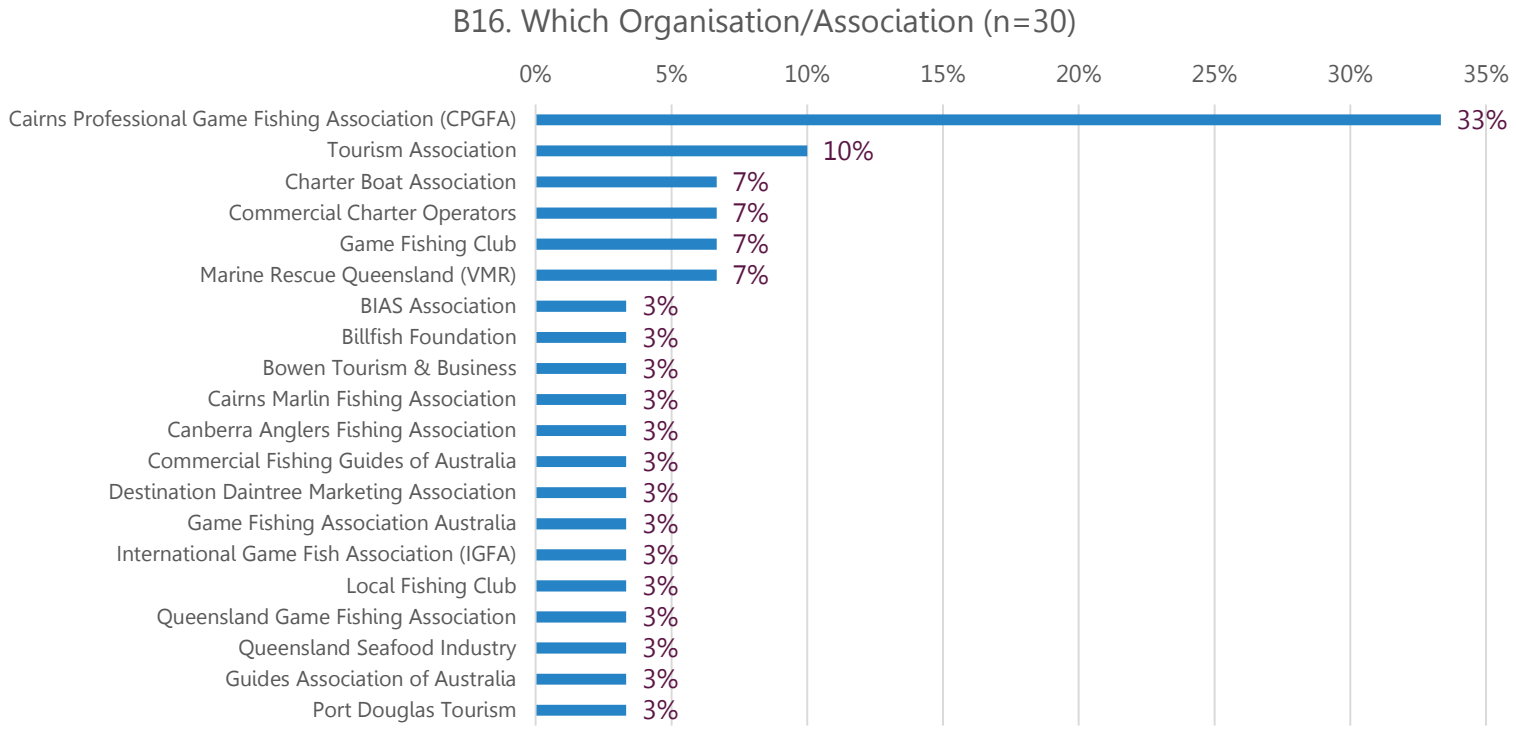
Less rules and regulations/ improved zoning	*For the government to treat the commercial charter sector in parity with the commercial fishing sector in terms of access to grants and assistance.*	*The recreational lobby groups seem to have more impact on government decisions than the commercial and charter boat industry. Some of the figures reported are not fact and decisions are made that overestimate the importance of recreational fishing to a degree.*	*To have legislation around the areas where operators could work would make the operation more worthy.*	*To be a little less regulated and helped by the government for exposure and to prove that what we do is very sustainable.*	*The Government can offer low interested loans to help the industry grow, better education and smooth the processes that work. We get fined if we don't write down which fish is caught. There has to be some courtesy to our industry.*
Promote Great Barrier Reef/ Charter fishing/ marketing	*Stop the green movement and for the media to stop sensationalising the lack of wellbeing within the Great Barrier Reef. People are not spending money on recreational activities. There needs to be more face to face contact from industry groups and government departments with industry stakeholders.*	*More promoting of the Great Barrier Reef Black Marlin fishing.*	*Tourism Queensland to get off their backside during COVID-19 and put in place a good marketing program so that when we do start operating again we hit the ground running.*	*The Government of Tourism could chip in more money for marketing.*	*Promotion of charter operators in Queensland.*
Licence fees/ licence capping/ ability to resell licence	*To cap all the licences and permits. With a licence not being capped, I do not have any license to sell as it holds no value.*	*To cap the number of licences available and this would protect our industry and provide security to existing licence holders.*	*They could limit the amount of operators in one area or cut the amount of licences they sell each year.*	*Cheaper registration and cheaper fishing licence. Remove pontoon costs to charter boat operators.*	*There needs to be a cap put on licences plus some sort of local government focus on tourism for the charter fishing industry.*

B15. What mechanisms could be put in place to provide you with more financial or operational security as a charter operator in Queensland?
Asked of all licence holders, n=100.

Industry as a whole – Member Associations



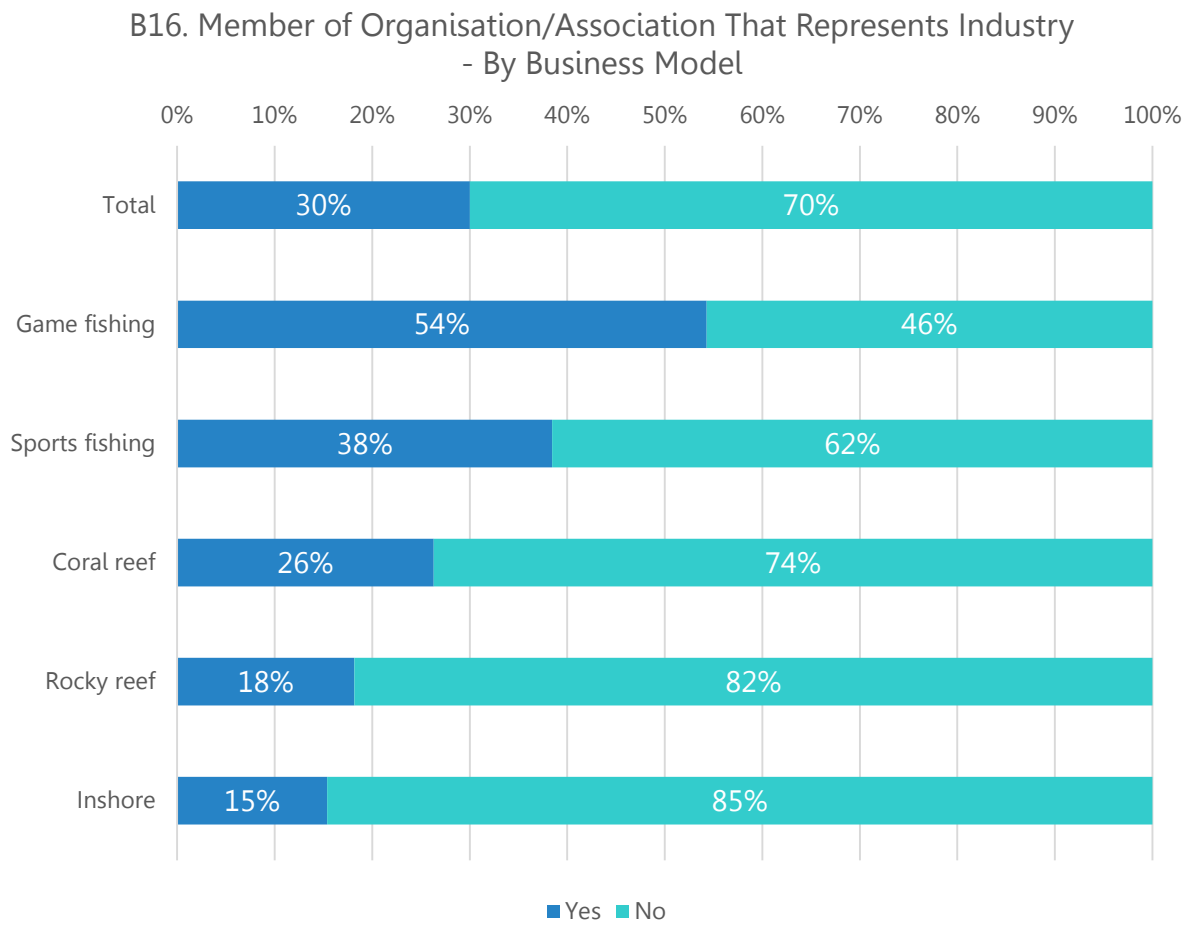
Finally, 30% of operators surveyed are members of an organisation or association that represents the industry.



The most common member industry for Queensland Charter Fishing Operators is the Cairns Professional Game Fishing Association (CPGFA).

B16. Are you a member of an organisation or association that represents your industry? If so, which one?
Asked of all licence holders, n=100.

Industry as a whole – Member Associations by Business Model



Top Mentions	Game Fishing (n=19)	Sports Fishing (n=20)	Coral Reef (n=10)	Rocky Reef (n=4)	Inshore (n=4)
Top	Cairns Professional Game Fishing Assoc. (47%)	Cairns Professional Game Fishing Assoc. (40%)	All 10 responses were individual assoc./orgs.	Charter Boat Assoc. (50%)	Tourism Assoc. (50%)
Second	Game Fishing Club (11%)	Tourism Assoc. (15%)		All other mentions were individual assoc./orgs	All other mentions were individual assoc./orgs
All other	All other mentions were individual assoc./orgs	All other mentions were individual assoc./orgs			

Membership of Organisations/Associations is highest among the Game Fishing (54%) and Spots Fishing (38%) business models, with the key association being the Cairns Professional Game Fishing Association.

Membership among other business models is low and disparate, with no clear voice for the industry emerging.

B16. Are you a member of an organisation or association that represents your industry? If so, which one?
Asked of all licence holders, n=100.

Summary 1

Business Confidence – Looking Back

- Overall, the majority of the operators who were interviewed felt their business was either staying the same or in decline (62%). 38 out of the 100 operators that were interviewed has seen their business improve of the last 12 months.
- By business model, there is a lower proportion of Game Fishing businesses who feel their business has improved in the last 12 months, where all other business models mirror the overall result.
- There were no significant differences between day-trip operators and multi-day operators in terms of positive business improvement in the last 12 months, however a higher number of day-trip operators felt that their business had declined in the last 12 months compared with the multi-day operators.
- Similarly, those operators who mostly undertake sports fishing compared with those who mostly undertake harvest fishing felt their businesses had declined in the last 12 months.

Business Confidence – Looking Forward

- Overall, the majority of operators (83%) believe there will be either no change or a negative change to their business performance in the next 12 months. Only 17 out of the 100 operators that were interviewed believe that business will improve in the next 12 months.
- By business model, approximately two-thirds of Game Fishing and Sports Fishing businesses, and approximately half of other business models indicating there will be a negative change in their business over the next 12 months.
- This is especially so for those operators with mostly international customers – 0% believe there will be a positive change to their business in the next 12 months (which is understandable given the current COVID-19 restrictions on travel).
- Day-trip operators have a slightly higher percentage of operators who feel that their business might have a positive change compared to multi-day operators.

Summary 2

Perceptions of the Industry as a whole

- Overall, the majority of operators (80%) perceive the charter fishing industry in Queensland to be either staying the same or in decline. Only 20% believe that it is improving.
- The majority of Game Fishing, Sports Fishing and Coral Reef businesses are more likely to perceive that the industry is in decline (all over 50%). Rocky Reef businesses are the most positive about the industry, with only a third indicating the industry is in decline.

Business Performance – Barriers and Opportunities

- The top three unprompted barriers for operators that are impacting their business performance include changes to fishing or government regulations/fees, lack of promotion and infrastructure and COVID-19 regulations and impact on the industry
- When prompted with a list, the number of sharks at fishing grounds is perceived as a major barrier by the majority of operators (74%).
- Loss of income due to weather conditions and increased recreational fishing boats are also perceived as major barriers by just under two-thirds of operators (57% each).
- Multi-day operators are impacted more significantly by the shark numbers issue than day-trip operators. Day-trip operators are more impacted by loss of income due to weather conditions compared with multi-day operators.
- Operators believe that the top five ideas to help business performance include getting reviews and recommendations from customers, keeping in touch with previous customers and attracting repeat business, upgrading equipment and gear, maintaining a social media presence and finding new customers through advertising and promotion.
- By business model, getting reviews and recommendations, and maintaining a social media presence are common top priorities among all business models.
- Day-trip operators, in particular, also find it important to improve the on-board experience, improve website experience, and be able to set client expectations before the trip to ensure clients are happy with the experience they receive.
- Those whose business has improved in the last 12 months have a higher tendency to agree that these business improvement suggestions are likely to help versus those whose business has stayed the same or declined.

Summary 3

Business Performance – Ideas Testing

- 46% of operators agreed that a Tourism Queensland campaign on a target species would be a good idea that would be likely to help improve business performance – and most of those who agreed with the idea would like to see Black Marlin, Blue Marlin, Sailfish, Coral Trout or Spanish Mackerel included in this promotion.
- Spanish Mackerel and Coral Trout are consistent to species to target across all business models, whereas Black Marlin, Blue Marlin and Sailfish would be more suited to Game Fishing and Sports Fishing businesses.
- 45% of operators agreed that additional services ("add-ons") to generate income would be likely to help improve their business performance, with suggestions including different tour options, clothing/merchandise/fishing tackle, other fishing activities or airport/accommodation transfers as ways for operators to do this.
- The key barrier preventing operators from providing additional services are either being prevented/not permitted to do so or lacking the available funds.
- 62% of operators believe that improving conversion rate of client enquiries to firm bookings is a key way to improve business performance. The main reasons for why clients do not proceed according to the operators is because of the price/cost first and fore most. Other reasons include clients feeling their expectations won't be met, competition from other businesses or weather conditions.
- 67% of operators believe that setting client expectations before the trip to ensure they are happy with the experience is a key way to improve business performance.
- In the event of a poor fishing experience, operators will typically offer discounts/promotional merchandise, complimentary fishing days or in some cases a refund. The majority of operators either do nothing, or don't know what they would do because they say this has never happened to them.

Summary 4

Business Operations - Activities

- Overall, fishing is offered by 100% of all operators (!). Other common activities include wildlife experiences, providing non alcoholic beverages, coastline viewing and chilling caught fish.
- The top activities offered across all business models include wildlife experiences and coastline viewing.
- Multi-day operators are much more likely to offer a full package deal with all of the above and also other activities such as food/lunch, cleaning caught fish, on-board sashimi experiences, viewing the Great Barrier Reef, snorkelling, swimming with sea life and cooking caught fish on board.
- 17% of operators would like to offer more activities that can't be offered for some reason – These included things like whale watching (24%), In-shore opportunities (18%) or fish filleting, fish availability or snorkelling (each 12%).
- The key barriers to implementing these additional ideas included marine park restrictions/permits (71%) or boat suitability (18%).
- While most operators are offering wildlife experiences (89%) and/or coastline viewing (84%) as additional activities to the charter fishing experience, many clients are much more interested in additional activities such as viewing the Great Barrier Reef (83%), Crab/Lobster/Bug fishing experiences (76%), snorkelling (71%) and/or swimming with sea life activities (70%) compared with what activities are currently offered by charter boat operators.

Summary 5

Business Performance – Booking Methods, Booking Process and Post-Booking Methods

- The majority of operators take customer booking via phone call (82%), email (53%) or through the operators' website (31%). Inshore businesses are more likely to receive bookings via their website that other business types. Multi-day operators have a high tendency compared with day-trip operators to book customers via email.
- The majority of operators (58%) take a deposit for the booking up-front and the remainder on the day of the trip, or full payment for the booking on the day of the trip (31%). Inshore businesses have a slightly higher incidence of taking the full payment for the booking on the day of the trip itself. Day-trip operators have a higher tendency to take full payment for the booking on the day of the trip itself.
- When viewing these results by business performance in the last 12 months, those whose business improved had a much higher tendency to take booking by social media (26%). It is interesting to note that a much higher proportion of those operators whose business performance has declined in the last 12 months (46%) tend to take full payment on the day of the trip, rather than some form of deposit/full payment combination.
- The majority of all operators will send a confirmation email on the day the booking is made (56%) – which is especially true for multi-day operators. This is less likely for Rocky Reef businesses, who prefer to undertake a reminder call the day prior to the trip.
- They majority of operators will also make a reminder telephone call the day prior to the trip (54%) – which is somewhat higher for day-trip operators. (Multi-trip operators will tend to send a reminder email a few days prior to the trip compared to a phone call).
- When viewing these results by business performance in the last 12 months, those whose business has either stayed the same or declined tend to have a lower proportion of operators who send a confirmation email on the day of the booking.
- Those operators whose business has declined in the last 12 months also tend to rely on reminders closer to the time of the trip (either by email or telephone) rather than relying on confirmations at the time of the booking.

Summary 6

Business Operations – Comparing Client Expectations with Operators' Business Operations

- When comparing the operator survey results with the client survey results on booking methods, operators are exceeding service expectation on phone calls and email communication. However, the majority of clients (50%) would like an option to book through the charter boat operators website or through a booking website that offers a range of tour options (32%) – neither of which are being sufficiently provided by operators.
- The majority of clients (51%) expect to pay a deposit at the time of booking and the remainder on the day, however 38% expect to make full payment upon booking (which only 7% of operators currently ask for).
- The majority of clients (81%) would like a confirmation email at the time of booking, a reminder email a few days prior (47%) and/or the day prior (24%) as well as an SMS confirmation on the day the booking is made (28%). Operators are not exceeding customer expectations on any of these services.

Business Operations – Marketing and Promotion, including confidence using digital media

- The majority of operators (83%) tend to market their businesses by utilising social media for the business (e.g., Facebook), followed by operating a website (80%). These are common among all business models. These activities are slightly higher for day-trip operators whereas multi-day operators also tend to email information and offers to past clients (75%).
- When viewing these results by business performance in the last 12 months, those operators whose business improved had a slightly higher proportion of operators who utilised social media. They also tended to advertise more in print publications such as local newspapers/fishing magazines (53%) or pamphlets/brochures for display in hotels/tourist centres (50%).
- The majority of operators (64%) feel confident using digital media but just under a quarter (23%) do not. Confidence is highest among the Inshore businesses (77%), followed by Rocky Reef (68%) and Sports Fishing (67%) businesses.
- Day-trip operators tend to feel more confident using digital media (71%), while multi-day operators have a higher number of operators who do not feel confident using digital media (38%).
- There is a significant difference in reported confidence using digital media between those operators whose businesses improved in the last 12 months (76%) compared with those whose businesses stayed the same or declined.

Summary and Conclusions 7

Business Operations – Resilience

- In the case of a severe weather event (e.g., a cyclone), or an unexpected event such as the recent coronavirus epidemic, operators will tend to rely on other business ventures (15%), live off savings, superannuation or overdraft (10%), or reschedule bookings/cancel bookings (10%) as strategies to manage.
- Of those operators who commented on the impact of COVID-19 regulations (17%), these comments related to how this is just not something that could have been planned for and hence there was no strategy in place to be able to deal with this.
- In the event of not being able to target main fish species for some reasons, most operators would simply target another species (38%), look for another job or business (12%) or sell/close the business (9%).
- Multi-day operators have a higher number of operators who would look for alternative work and/or take time off or retire. Day-trip operators would more easily switch to another species, or diversify their business.

Industry as a whole – Benefits of licence and member associations

- Most operators perceived no specific benefit from holding a charter fishing licence beyond it being a requirement to operate a charter fishing business (39% identified this benefit, 20% said there is no benefit).
- The mechanisms that would provide operators with more financial/operational security include less regulations and zoning (23%) promoting the Great Barrier Reef and charter fishing in general (15%) and licence fees/capping and ability to resell (12%) - particularly for multi-day operators.
- Inshore businesses believe the promotion of the charter fishing industry will the a key mechanism to improve financial/operational security.
- Finally, 30% of operators surveyed are members of an organisation or association that represents the industry. The most common member industry for Queensland Charter Fishing Operators is the Cairns Professional Game Fishing Association (CPGFA).

Summary and Conclusions 8

In conclusion, these results indicate that the charter boat fishing industry in Queensland desperately needs support in helping identify how to improve overall business operation and performance – not only as a result of the COVID-19 situation but in terms of the perceptions of the industry as a whole over the past 12 months and longer.

Most operators feel that their business is either staying the same or in decline and agree that there may be ways to help improve business performance that involve changes to the way they operate as well as changes to the way industry facilitates and supports the operators to do so.

The next and final stage of this research project is to present an opportunities plan for Fisheries Queensland and the operators that provides specific and targeted advice for how to achieve improved business performance (beyond the coronavirus situation). This plan will be based on the opportunity themes identified and analysed in a separate workbook.

The opportunities plan is attached separately.

Action Market Research & Hudson Howells Partnership in collaboration with BDO EconSearch 2020