

23 MARYBOROUGH TRC

MARYBOROUGH TRC

The Maryborough TRC consists of the main urban centre of Maryborough (Figure 23.1).

BUSINESS PROFILES

Location and Use of Ports

Table 23.1 shows the number of licence holders within the Maryborough TRC and the number of survey respondents who reported having homeports within the TRC. It is estimated that there are 36 commercial fishing businesses within this TRC with the 95% confidence interval indicating that the true population count of commercial fishing businesses within the TRC as being between 24 and 48. Figure 23.1 shows the geographic location of this TRC.

Table 23.1
Location of Homeports

Town	Adj. Database Count	Sample Count	Estimated Count	Percent within TRC
Maryborough UC	32	12	29	80.6
Aldershot	1	1	2	5.6
Eurong	0	2	5	13.8
Total TRC	33	15	36	100.0

95% Confidence Interval for Estimated TRC Count 24-48
Percent of Total Active Licence Holders in QLD 1.5%

Note: The Maryborough UC includes Granville and Tinana. Adjusted database count is based on the postal address as recorded in the licencing information, which may not be the homeport of the fishing businesses. The adjusted database count reduces the count for latent licence holders (8.8%)
The estimated count adjusts the sample count by the sampling fraction of 2.444.

Fishing Activity and Type

Table 23.2 shows the type of fishing activity undertaken within the last year by fishing businesses within this TRC. Netting (67%) and crabbing (67%) are the primary fishing activities within the Maryborough TRC.

Table 23.2
Type of Fishing Activity (During the last 12 months)

Fishing Type	Sample Count	Percent within TRC
Netting	10	66.7
Crabbing	10	66.7
Line fishing	6	40.0
Trawling	4	26.7
Spanner Crabs	1	6.7
Total Sample	15	100.0

Note: This is a multiple response table where all rows are independent.

Crabbing and netting were the primary fishing activities that co-occurred within this TRC (Table 23.2). Of the sample of crabbers, 70% were also engaged in netting, while among those engaged in netting, 70% were also crabbing.

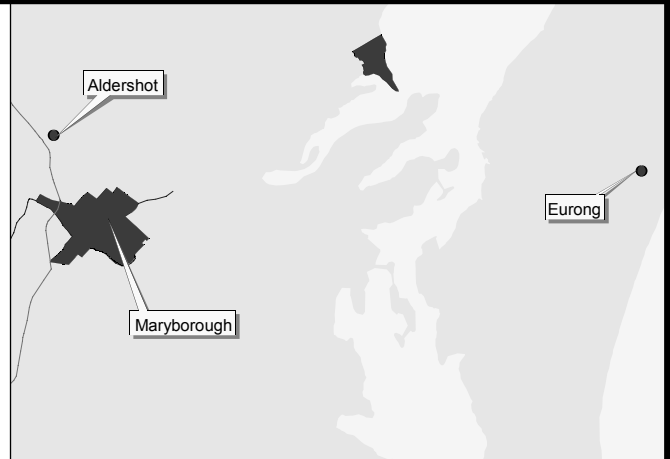


Figure 23.1 Location of the Maryborough TRC

Table 23.3
Co-occurrence of Fishing Activities

	Line Fishing	Trawling	Crabbing	Netting
Line fishing	6 <i>100.0</i>	0 <i>0.0</i>	4 <i>40.0</i>	3 <i>30.0</i>
Trawling	0 <i>0.0</i>	4 <i>100.0</i>	3 <i>30.0</i>	3 <i>30.0</i>
Crabbing	4 <i>66.7</i>	3 <i>75.0</i>	10 <i>100.0</i>	7 <i>70.0</i>
Netting	3 <i>50.0</i>	3 <i>75.0</i>	7 <i>70.0</i>	10 <i>100.0</i>

Note: The co-occurrence table should be read by column. Column percentages are given as italics.

Table 23.4 shows the peak months for fishing activity within the TRC to be between February and July.

Table 23.4
Peak Fishing Months During Past 12 Months

Months	Sample Count	Percent within TRC	Percent of QLD Fishery
January	5	35.7	24.5
February	7	50.0	29.7
March	7	50.0	43.9
April	7	50.0	42.8
May	7	50.0	38.1
June	9	64.3	33.5
July	6	42.9	23.9
August	1	7.1	19.9
September	1	7.1	23.5
October	1	7.1	24.8
November	3	21.4	26.2
December	5	35.7	21.4

Table 23.5 provides a more detailed description of the seasonal variation in fishing activities by businesses. Line fishing is most common between April and August, crabbing between August and November and netting between June and December (Table 23.5).

Table 23.5
Seasonal Variations in Fishing Activity

Months	Sample Count	Percent within TRC	Percent of Fishery
Line Fishing			
January	3	50.0	64.6
February	2	33.3	64.3
March	3	50.0	68.1
April	5	83.3	70.4
May	5	83.3	74.7
June	4	66.7	78.7
July	4	66.7	82.0
August	4	66.7	80.8
September	3	50.0	79.7
October	3	50.0	79.7
November	2	33.3	78.2
December	3	50.0	70.6
Crabbing			
January	6	66.7	74.7
February	7	77.8	79.0
March	7	77.8	75.1
April	6	66.7	69.4
May	6	66.7	67.2
June	6	66.7	58.5
July	7	77.8	52.0
August	9	100.0	50.2
September	8	88.9	53.3
October	8	88.9	55.9
November	8	88.9	66.4
December	6	66.7	72.1
Netting			
January	9	90.0	57.5
February	8	80.0	72.9
March	9	90.0	73.9
April	9	90.0	74.2
May	9	90.0	77.6
June	10	100.0	79.9
July	10	100.0	75.9
August	10	100.0	73.9
September	10	100.0	69.6
October	10	100.0	64.2
November	10	100.0	55.9
December	10	100.0	54.5

Note: Trawling has been excluded due to the low sample count

Location of Resource Use

Figure 23.2 shows the location of resource use by commercial fishing operations in the Maryborough TRC. Both the primary and secondary resource catchments are restricted to the Hervey Bay region. The primary resource catchment includes areas at the north and southern ends of the Great Sandy Straits, while the secondary catchment includes Hervey Bay, the Great Sandy Straits and Rainbow Beach in the south.

Fishing Industry Employees

Table 23.6 identifies the number of employees of commercial fishing businesses within this TRC for both peak and off-peak seasons. The majority of businesses within peak and off-peak seasons had only one full-time employee (which would include the owner or operator). The average number of employees per business during the peak season was 1.7 employees per business and in the off-peak season it was 1.6. It is estimated that during the peak season there were 61 full

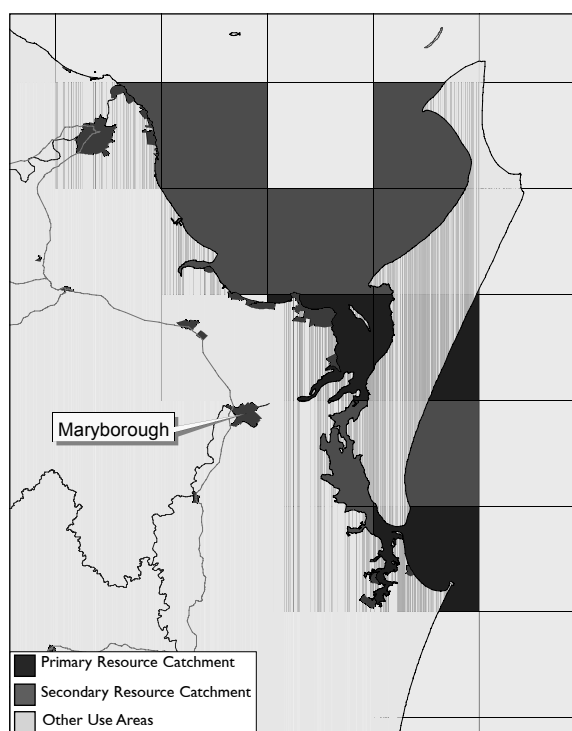


Figure 23.2 Maryborough TRC: Location of Resource Use

time equivalent employees while during the off-peak season there were an estimated 58 full-time equivalent employees.

Business Ownership and Size

Table 23.8 shows the number of years the current owner or operator has owned the fishing business. On average, businesses within this TRC had been owned for an average of 18 years, with 53% of businesses being owned by the current owner for less than 15 years.

Table 23.8
Number of Years of Current Ownership of the Fishing Business

Number of Years	Sample Count	Percent within TRC	Cumulative Percent
1-5	2	13.3	13.3
6-10	4	26.6	39.9
11-15	2	13.3	53.2
16-20	2	13.3	66.5
21-25	1	6.7	73.2
26-30	2	13.3	86.5
31+	2	13.3	100.0
Total	15	100.0	

Mean Number of Years owned or operated 18.0
Difference of TRC mean to QLD mean (14.6)+3.4

Note: Standard errors for number of years ownership (sample =3.4. QLD population = 0.37).

Table 23.6
Number of Employees

Number of Employees	Full-Time Count	Full-Time Percent	Part-Time Count	Part-Time Percent	Casual Count	Casual Percent
Peak Season						
Nil	2	13.3	11	73.3	10	66.7
1	7	46.7	4	26.7	4	26.7
2-3	6	40.0	0	0.0	1	6.7
4-5	0	0.0	0	0.0	0	0.0
6-7	0	0.0	0	0.0	0	2.2
8-9	0	0.0	0	0.0	0	0.0
10-11	0	0.0	0	0.0	0	0.0
12-13	0	0.0	0	0.0	0	0.0
14-15	0	0.0	0	0.0	0	0.0
16-17	0	0.0	0	0.0	0	0.0
18-19	0	0.0	0	0.0	0	0.0
20-21	0	0.8	0	0.0	0	0.0
Total Businesses	15	100.0	15	100.0	15	100.0
Total Employees	20		2		3	
Mean Number of Employees per Business (Peak)		1.7				
Estimated Number Employed within the TRC		61				
Off-Peak Season						
Nil	1	6.7	12	80.0	13	86.7
1	8	53.3	3	20.0	1	6.7
2-3	6	40.0	0	0.0	1	6.7
4-5	0	0.0	0	0.0	0	0.0
6-7	0	0.0	0	0.0	0	0.0
8-9	0	0.0	0	0.0	0	0.0
10-11	0	0.0	0	0.0	0	0.0
12-13	0	0.0	0	0.0	0	0.0
14-15	0	0.0	0	0.0	0	0.0
16-17	0	0.0	0	0.0	0	0.0
0	0	0.0	0	0.0	0	0.0
20-21	0	0.0	0	0.0	0	0.0
Total Businesses	15	100.0	15	100.0	15	100.0
Total Employees	21		1.5		1.5	
Mean Nos Employees per Business (Off-Peak)		1.6				
Estimated Number Employed within the TRC		58				

Note: Part-time and casual employment is recorded as 0.5 when contributing to total employment.
Total number of employees includes the owner-operator and is the number of full-time equivalent employees.
Estimates of total employment based on an estimated 36 fishing businesses (Table 23.1)

The average number of years the business had been operating was 25 years (Table 23.8), which was significantly longer than the average for all Queensland fishing businesses (18.2 years).

Table 23.8
Number of Years Business has been Operating

Number of Years	Sample Count	Percent within TRC	Cumulative Percent
1-5	2	13.3	13.3
6-10	4	26.6	39.9
11-15	2	13.3	53.2
16-20	2	13.3	66.5
21-25	1	6.7	73.2
26-30	2	13.3	86.5
31+	2	13.3	100.0
Total	15	100.0	
Mean Number of Years owned or operated			25.0
Difference of TRC mean to QLD mean (18.2)			+6.8

Note: Standard errors for number of years operated (sample = 9.3; QLD population = 0.46)

Table 23.9 shows that the majority of fishing businesses within this TRC operated either one or two boats (60%).

Table 23.9
Number of Boats Operated by Fishing Businesses

Number of Boats	Sample Count	Percent within TRC
1	6	40.0
2	3	20.0
3	1	6.7
4	2	13.3
5	0	0.0
6+	3	20.0
Total Number of Businesses	15	100.0
Mean Number of Boats Operated		3.0
Difference of TRC mean to QLD mean (1.7)		+1.3

Note: Standard errors for number of boats operated (sample = 0.6; QLD population = 0.05)

Table 23.10 shows the frequency distribution for length of boats. Sixty-two percent of boats were found to be between 3 and 6 metres, with the mean length of all boats and the mean length of the largest boat also being significantly shorter than the Queensland average.

Table 23.10
Length of Boats Operated by Fishing Businesses

Length of Boat (metres)	Sample Count	Percent within TRC
3-6	28	62.2
7-10	16	35.5
11-14	1	2.2
15-18	0	0.0
19-22	0	0.0
23+	0	0.0
Total Number of Boats	45	100.0
Mean Length of Boats Operated (metres)		6.2
Difference of TRC mean to QLD mean (9.9)		-3.7
Mean Length of Largest Boat Operated (metres)		7.7
Difference of TRC mean to QLD mean (11.4)		-3.7

Note: As mean length of boats is a multiple response, standard errors cannot be computed. Standard errors for mean length of largest boat (sample = 0.5; QLD population=0.14)

Value of Production and Location of Sales

Table 23.11 shows for the 12 months prior to the survey, the wholesale value of all products sold by fishing businesses within the Maryborough TRC. In the Maryborough TRC there is a higher percentage of businesses with production values less than between \$100,000 per annum (80%) when compared to the Queensland average (43%). In addition, the median GVP of \$50,426 for the Maryborough TRC is significantly lower than the Queensland median GVP of \$128,629.

Within the Maryborough TRC it is estimated that the 36 fishing businesses had a gross value of production of approximately \$1.8 million, which is approximately 0.6% of the total value of production of the Queensland commercial fishing industry.

Table 23.11
Wholesale Value of Product (Annual value)

Wholesale Value (\$,000)	Sample Count	Sample Percent	Queensland Percent															
Less than \$100	12	80.0	42.8															
\$101 - \$200	3	20.0	21.4															
\$201 - \$300	0	0.0	16.2															
\$301 - \$400	0	0.0	8.5															
\$401 - \$500	0	0.0	3.8															
\$501 - \$600	0	0.0	1.8															
\$601 - \$700	0	0.0	1.3															
\$701 - \$800	0	0.0 </tr <tr> <td>\$801 - \$900</td> <td>0</td> <td>0.0</td> <td>1.0</td> </tr> <tr> <td>\$901 - \$1,000</td> <td>0</td> <td>0.0</td> <td>0.3</td> </tr> <tr> <td>Over \$1,000</td> <td>0</td> <td>0.0</td> <td>2.3</td> </tr> <tr> <td>Total</td> <td>15</td> <td>100.0</td> <td>100.0</td> </tr>	\$801 - \$900	0	0.0	1.0	\$901 - \$1,000	0	0.0	0.3	Over \$1,000	0	0.0	2.3	Total	15	100.0	100.0
\$801 - \$900	0	0.0	1.0															
\$901 - \$1,000	0	0.0	0.3															
Over \$1,000	0	0.0	2.3															
Total	15	100.0	100.0															

Median GVP for TRC	\$50,426
Estimated Total GVP for TRC	\$1,815,000
Median GVP for QLD Population	\$128,629
Estimated Total GVP for QLD Population	\$314,241,000
Percent of Total Queensland Production	0.6%

Note: Estimated TRC population total is based on an estimate of 36 businesses within the TRC, with a median GVP of \$50,426
Queensland total GVP based on 2,444 businesses (2,679 licenced businesses with 8.8% latency) with a median GVP of \$128,629.

Table 23.12 shows the value of sales to specific locations within Australia for the sample of 15 businesses and the percentage of sales to each location. The sample percent of sales to each location has been used directly to estimate the total value of business sales to all locations. From Table 23.12, and as shown in Figure 23.3, 44% of sales (\$0.8 million) occurs directly within Hervey Bay, \$0.5 million to Maryborough, while a further \$0.2 million is sold in Brisbane. It is probable that much of the sale to overseas markets (\$0.2 million) occurred firstly within the towns of Hervey Bay, Maryborough and Brisbane, thereby increasing the total value of sales within these locations.

Table 23.12
Town Location of Sales to Customers (\$'000)

Location	Sample Value of Sales	Percent of Sample	Estimated Sales
Hervey Bay	445	44.4	806
Maryborough	269	26.9	488
Brisbane	120	12.0	218
New South Wales	42	4.2	76
Mooloolaba	27	2.7	49
Victoria	14	1.4	25
Total Sales (Australia)	917	91.6	1,662
Total Sales (Overseas)	84	8.4	153
Total Sales	1,001	100.0	1,815

Note: Hervey Bay includes Urangan.
The sample value of sales is based on GVP as reported by businesses in the survey.
The estimated value of business sales (Table 23.12) is proportionally distributed to all locations on the basis of sample percentages.

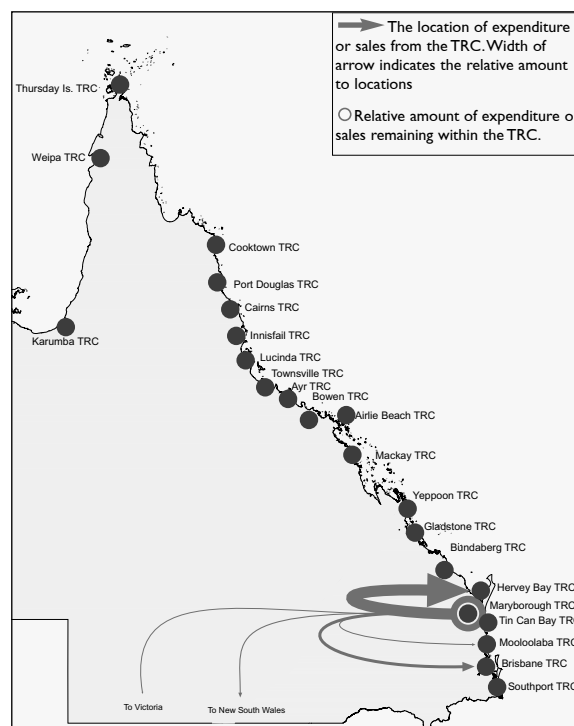


Figure 23.3 Maryborough TRC: Location of Business Sales

Business Expenditure and Debt Levels

Table 23.13 and Figure 23.4 show that approximately \$0.9 million was spent by businesses in this TRC within the previous year on business goods and services (excluding salaries and wages). The majority of this expenditure occurred within the towns of Maryborough (\$0.6 million) and Brisbane (\$0.1 million).

Table 23.13
Town Location of Business Expenditure
(All costs, excluding salaries and wages)

Location of Expenditure	Sample Value of Expenditure (\$'000)	Percent of Sample	Estimated Expenditure (\$'000)
Maryborough	344	68.1	644
Brisbane	74	14.6	138
Hervey Bay	45	8.9	84
Bundaberg	15	3.0	28
Gympie	14	2.8	26
Forest Hill	4	0.8	8
Gatton	4	0.8	8
Ipswich	4	0.8	8
Rockhampton	1	0.2	2
Total Expenditure	505	100.0	946

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

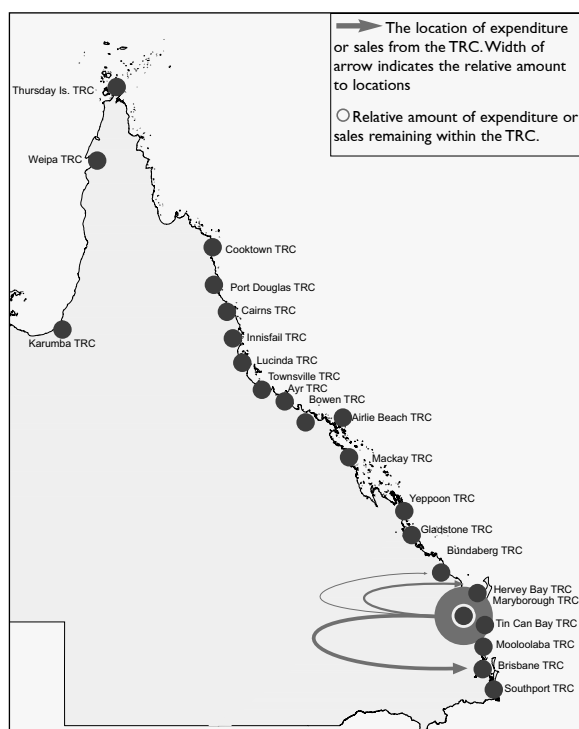


Figure 23.4 Maryborough TRC: Location of Business Expenditure

Asking each business operator what percentage of their business assets were not owned outright by their business, identified for the purpose of this study the level of business debt. Table 2.15 shows that 83% of businesses within the Maryborough TRC had no debt. The mean debt level within the TRC was 5% of business assets, which was significantly lower than the Queensland industry average of 16.6%.

Table 23.14
Business Debt Levels

Percent of Assets Not Owned	Sample Count	Sample Percent	Queensland Percent
Nil	10	83.3	60.1
1 – 10%	1	8.3	6.4
11 - 20%	0	0.0	5.2
21 - 30%	0	0.0	6.4
31 – 40%	0	0.0	3.3
41 – 50%	1	8.3	9.6
51 – 60%	0	0.0	1.8
61 – 70%	0	0.0	1.2
71 – 80%	0	0.0	1.1
81 – 90%	0	0.0	1.6
91 – 100%	0	0.0	3.3
Total	12	100.0	100.0

Mean Debt Level for TRC 5.0%
Median Debt Level for QLD Population 16.6%
Difference of TRC mean to QLD mean (16.6)-11.6%

Note: Debt level defined as the percentage of total business assets not owned outright by the business.

EMPLOYEE PROFILES

Town of Residence

Table 23.15 indicates that the majority of employees reside within the town of Maryborough (92%).

Table 23.15
Town of Residence

Town of Residence	Sample Count	Percent of Sample
Maryborough	22	91.6
Aldershot	1	4.2
Fraser Island	1	4.2
Total	24	100.0

Months Employed in the Fishing Industry

Table 23.16 shows that during the past 12 months owner-operators are more commonly employed in the fishing industry between November and March, while employees are more commonly employed between March and July.

Table 23.16
Months Employed in the Fishing Industry During the Past 12 Months

Months	Owner/ Operators	Employee	Total Within TRC	All QLD Employees
January	100.0	66.7	90.9	80.7
February	100.0	66.7	90.9	82.3
March	100.0	83.3	95.5	86.1
April	93.8	83.3	90.9	86.8
May	93.8	83.3	90.9	87.3
June	93.8	83.3	90.9	87.8
July	93.8	83.3	90.9	86.7
August	93.8	66.7	86.4	86.3
September	87.5	66.7	81.8	86.8
October	93.8	66.7	86.4	85.4
November	100.0	66.7	90.9	84.4
December	100.0	100.0	100.0	82.3

Note: Owner-operator sample of 17; employee sample of 7.

Location of Household Expenditure

Table 23.17 shows the location of household expenditure related to individual income derived from employment in the fishing industry. Maryborough attracts 92% (\$1.1 million) of all annual employee household expenditure from within the TRC. As shown in Table 23.17 there is only relatively minor expenditure to other towns.

Table 23.17
Town Location of Household Expenditure
(all commodities and services)

Location of Household Expenditure	Sample Value of Expenditure (\$'000)	Percent of Sample	Estimated Expenditure (\$'000)
Maryborough	438	91.6	1,115
Cairns	10	2.1	26
Rainbow Beach	8	1.7	21
Gold Coast	6	1.2	15
Gympie	6	1.2	15
Hervey Bay	6	1.2	15
Bundaberg	3	0.6	7
Brisbane	2	0.4	5
Total Expenditure	479	100.0	1,217

Note: The gross individual annual income of fishers within this TRC was estimated as \$32,800 (Table 2.19). The Household Expenditure Survey for Queensland: 1993-1994 (ABS, 1996) indicates that for households in non-metropolitan areas 79% of gross weekly income was related to commodity and service purchases. Furthermore, of the total expenditure on commodities and services purchased by households, Queensland Input-Output tables indicate that 77% of expenditure occurs within Queensland, with the balance contributing to taxes and imports from outside Queensland. Applying these percentages to the gross individual annual income of employees indicates that direct employee expenditure on household commodities and services to be \$19,952, with total household expenditure across all 61 (Table 23.6) employees to be \$1.2 million (Table 23.17).

School and Employment Locations of Family Members

The towns in which family members attend school and are employed are shown in Table 23.18. As might be expected, Maryborough (91%) is the primary town location for school and employment.

Table 23.18
School and Employment Locations of Family Members

Location of Employment or School	Sample Count	Percent of Sample
Maryborough	41	91.1
Gladstone	2	4.4
Other towns	2	4.4
Total Family Members	45	100.0

*Note: Hervey Bay includes Urangan.
Counts and percentages based on all family members.
Other towns includes all towns with a frequency of one.*

Employee Social and Demographic Profiles

Table 23.19 provides profile information about employees within the TRC. Information is provided separately for owner-operators and non owner-operator employees of businesses within the TRC. For comparative purposes, information is also provided for all employees throughout Queensland.

Table 23.19 Owner-Operator and Employee Profiles

Profile	Owner/ Operators	Employee	Total Within TRC	All QLD Employees
Estimated Number of Employees ^b	36	25	61	7,088
Mean age of fisher	44.2	26.7	39.1	37.3
Age range	28-64	15-38	15-64	15-79
Percent males	100.0	100.0	100.0	94.8
Mean years resident in town	25.8	16.0	22.9	19.1
Mean number of years in fishing industry	21.8	4.8	16.8	12.6
Median hours per week in fishing industry	60.0	72.0	60.0	60.0
Percent moved town to retain employment	5.9	14.3	8.3	20.5
Percent currently employed in other industry	5.9	28.6	12.5	34.2
Percent previously employed in other industry	76.5	42.9	66.7	69.2
Housing tenure				
Rent	11.8	42.9	20.8	33.6
Mortgage	29.4	0.0	20.8	20.1
Own home	52.9	0.0	37.5	31.1
Other (eg, live with parents, on boat)	5.9	57.2	20.8	15.2
Educational				
Year completed school				
Primary school	11.8	14.3	12.5	5.2
Year 8	5.9	0.0	4.2	8.0
Year 9	11.8	0.0	8.3	11.9
Year 10	52.9	71.4	58.3	44.4
Year 11	5.9	0.0	4.2	10.1
Year 12	11.8	14.3	12.5	20.2
Percent completed trade or TAFE certificate	6.3	28.6	13.0	37.7
Percent completed industry or business course	11.8	14.3	12.5	15.2
Percent with business plan ^c	11.8	—	11.8	22.9
Percent active fishing group member	41.2	0.0	30.4	25.7
Marital Status				
Percent married or relationship	88.2	42.9	75.0	62.0
Percent with partner employed in business ^d	26.7	—	26.7	56.1
Median hours per week employed in business	25.0	—	25.0	20.0
Partners Income^{de}				
Full-time employment	26.7	66.7	33.3	28.3
Part-time employment	46.7	33.3	44.4	18.5
Casual employment	6.7	0.0	5.6	11.6
Not employed	20.0	0.0	16.7	41.5
Family Composition				
Mean family size	3.6	1.3	2.9	2.6
Estimated number of total family members	130	32	177	18,429
Dependency Ratios				
Age Dependency Ratio ^f	48.8	12.5	42.8	33.4
Elderly Dependency Ratio	0.0	0.0	0.0	2.3
Child Dependency Ratio	48.8	12.5	42.8	31.2
Family Member Industry Dependency Ratio ^g	23.1	0.0	23.1	23.9
Gross Individual Income				
Less than \$16,000	14.3	33.3	20.0	34.6
\$16,000 - \$26,000	14.3	16.7	15.0	19.6
\$26,000 - \$36,000	35.7	50.0	40.0	22.1
\$36,000 - \$52,000	14.3	0.0	10.0	11.7
\$52,000 - \$78,000	7.1	0.0	5.0	6.6
Over \$78,000	14.3	0.0	10.0	5.4
Average Income (\$)	37,571	21,667	32,800	27,471

Note: a Owner/operator sample of 17, employee sample = 7.

b Based on peak estimates derived in Table 23.6.

c Percentages for owner-operators only

d Percentage based on those fishers with partners.

e Includes partners income from all sources.

f The age dependency ratio is the number of children (below 15 years) and elderly persons (above 65 years) to every 100 persons in the population

g The industry dependency ratio is the number of persons in the family who are over 15 years of age and working in the fishing industry (excluding the direct industry employee) as a proportion of all family members over 15 years of age.

All Queensland employees includes all owner-operators and employees. Value is the weighted sample of owner-operators (2.43) and employees (8.68).

