



Factsheet

Valuing Victoria's professional fishing: measuring economic and social contributions in Near West Victoria



The near west region of Victoria includes communities along the Great Ocean Rd, the Surf Coast and the Bellarine Peninsula.

On the Great Ocean Rd, Port Campbell and Apollo Bay are home to Southern Rock Lobster fisheries. There are also coastal fisheries for abalone and live Wrasse, and inland there is eel. The Apollo Bay lobster fishers also take a limited amount of finfish, under permit, for the local market. There are professional fishers scattered across coastal communities along the Great Ocean Rd and Surf Coast but the fishing industry along this stretch of coastline has diminished over past decades.

The Bellarine Peninsula has a small processing, wholesale and retail sector for finfish that was founded on the Port Phillip Bay net fishery. However, there was a substantial contraction in 2016 when the sustainable, small-scale net fishery in the bay was shut to make way for recreational fishing. This fishery had served local communities, Geelong and Melbourne for over 170 years, but 600 tonnes a year of high-quality and diverse finfish is no longer available to consumers. Apart from the six remaining Port Phillip Bay fishers, there are only a handful of commercial fishers with home ports on the Bellarine, targeting rock lobster, live Wrasse, abalone and Commonwealth-licensed trawling.

While professional fishing in Apollo Bay itself is thriving, and it has a very active Fishermen's Co-op, the restructuring of the fishing industry along the rest of near west coast and the focus on export fisheries (abalone, rock lobster), has resulted in a lack of supply of finfish. There are opportunities for the industry to grow its contribution to local communities, in particular by increasing the supply of finfish and by developing stronger links with the active tourism industry in the region.



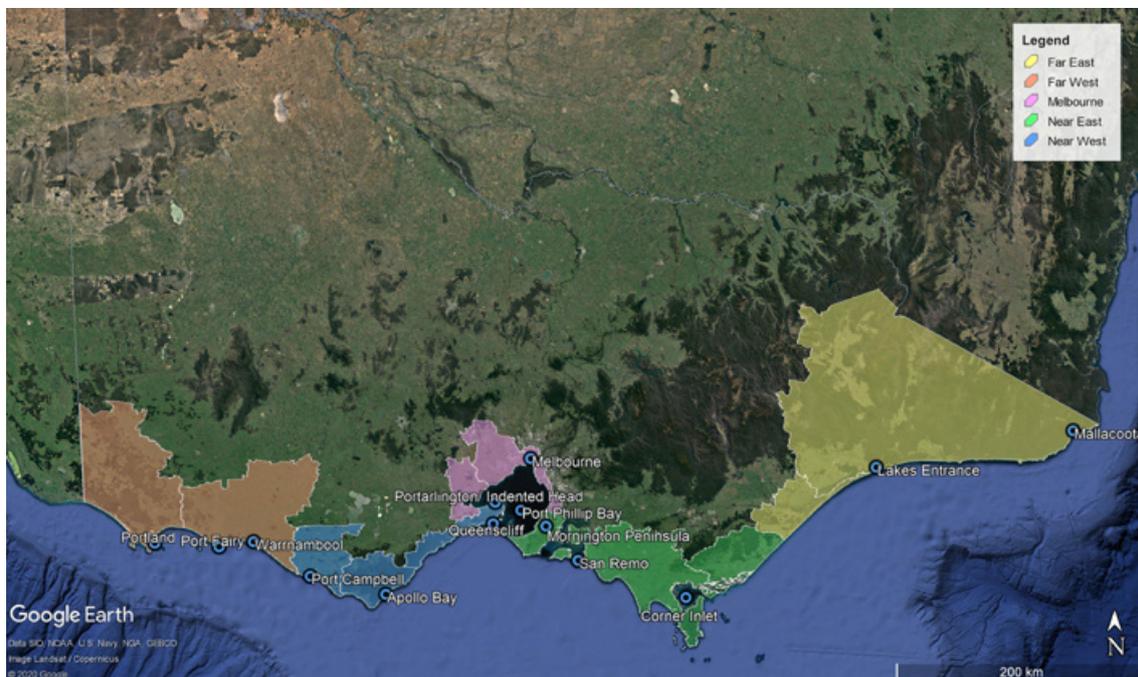
About the Study

This research project, conducted by the University of Technology Sydney (UTS), for the Fisheries Research and Development Corporation, investigated how the Victorian fishing and aquaculture industry contributes to the wellbeing of regional communities, and to Victoria overall.

This summary presents findings relevant to the professional fisheries and communities in the near west region. The study found the industry contributes to regional community wellbeing in five main ways:

- economic diversity and resilience
- food supply
- tourism and recreation
- environmental health
- social fabric

The project explored these contributions over two years and involved economic surveys of the fishing industry; in-depth interviews, workshops and surveys in regional communities; a large phone survey of the Victorian public; and surveys of tourism, hospitality and other businesses in seafood supply chains. The research also explored challenges and opportunities for the fishing and aquaculture industry.



Economic diversity and resilience

Near west fisheries generate significant economic contributions to the region

- Professional fisheries contributed \$22 million of added value – the wider economic contribution beyond just landed catch – to the near west region in the 2016/17 financial year.
- Professional fisheries contributed 198 full-time jobs in the near west in that period.
- Near west fisheries also provide important flow-on economic activities and jobs to Melbourne, in the processing, wholesaling and retailing sectors.

Near west fisheries provide diverse employment opportunities

- The industry supports opportunities from on-the-boat work through to associated businesses providing inputs, in transport, processing and sales, and in tourism and hospitality.
- The industry requires diverse and often high-level skills, but also provides entry-level jobs.
- It generates satisfying work for people who might otherwise find it hard to find jobs.
- In Apollo Bay, the industry provides opportunities for young entrants.
- Outside Apollo Bay, provision of employment has a much less central role today than in previous years.

Near west fisheries contribute to economic diversity and stability

- The industry contributes to a diversity of economic opportunity that's critical for economic resilience.
- It contributes to employment in places with few alternative industries. This is particularly the case in Apollo Bay, a town of just 1500 people in an area where farming and timber operations have declined.
- The fishing industry contributes to the economic stability of communities by providing activity throughout the year, whereas industries such as tourism operate seasonally or intermittently.

Coastal communities recognise the economic importance of the Victorian fishing industry

Residents of Victorian fishing communities surveyed say they recognise the economic importance of the fishing industry to their region:

- 81% believe the industry supports their local economy and provides jobs.
- 85% believe it helps create economic diversity in their community.
- 76% believe it is important for supporting their community during the tourist off-season.
- 68% are very or extremely concerned about job losses should fisheries be further restricted.

Food supply

Professional fishers provide access to a food source otherwise unavailable to non-fishers

- The near west accounted for 8% of the seafood professionally caught in Victoria in 2016/17.
- The near west produces premium seafood products such as rock lobster, wild-caught abalone, King George whiting and Southern Calamari from Port Phillip Bay.
- Most of the fish caught by Port Phillip Bay fishers on the Bellarine is consumed locally or in Victoria. The removal of the fishery has reduced access in quantity and diversity of species. After 2022, the catch will be a limited quantity of mainly one species, snapper, due to gear and catch restrictions.
- A number of near west fisheries provide seafood important to ethnic groups, such as abalone and Wrasse. However, with the removal of the Port Phillip Bay net fishery and subsequent restrictions, remaining fishers are targeting high-value species, affecting access to species valued by ethnic groups.
- Victorians and tourists travel to access local seafood in near west coastal communities, particularly Apollo Bay (lobster) and the Bellarine (finfish).

Victorians and coastal communities prefer local seafood

- 85% of Victorians surveyed prefer Australian seafood and 24% prefer Victorian seafood.
- The preference for Victorian seafood is even stronger for residents of coastal fishing towns, where 40% of respondents preferred seafood from their town or region.
- 74% of Victorians feel it is very or extremely important to know where their seafood comes from.
- 90% of Victorians surveyed believe it's important to produce seafood in Victoria and reduce reliance on imports, which account for over 70% of seafood consumed in Australia.
- Those Victorians surveyed prefer local seafood because:
 - They believe it is fresher and higher quality
 - They want to support the Australian economy and fishers
 - They believe it is safer to eat, and it is from cleaner waters

The hospitality sector experiences high demand for local seafood

- 62% of the hospitality sector surveyed says demand for local seafood is growing.
- 80% of those surveyed say demand for Victorian seafood is greater than for imported seafood.
- 58% of say demand for Victorian seafood is greater than for seafood from other states.
- Suppliers believe the past closures of Victorian professional fisheries have had a negative impact on their businesses, increasing prices (90%) and reducing availability (86%) of Victorian-caught species.
- 64% of suppliers consider they have lost customers in the wake of fisheries closures.

Tourism and recreation

Victorian coastal communities believe the fishing industry contributes to tourism

- 67% of residents surveyed in fishing towns believe the most important contribution the local seafood industry makes to communities is through the interactions with and benefits flowing to tourism.
- Apollo Bay has a clear link to tourism, being on the Great Ocean Road tourist trail.
- 5 million people visit the Greater Geelong and Bellarine area each year and tourism is growing.

Consuming seafood is part of the travelling experience along the Victorian coast

- 81% of Victorians surveyed say eating local seafood is an important part of their holiday experience.
- 88% of Victorians expect to eat local seafood when visiting the coast.
- 90% of Victorian tourism operators surveyed say tourists expect to eat local seafood.
- International visitors, particularly from Asia, are the group of visitors most interested in local seafood. In Apollo Bay, international tourists come to buy lobster at the Co-op and eat it sitting by the harbour.
- Victorian seafood producers have a particularly desirable product for international visitors, offering cultural delicacies such as abalone and rock lobster, along with a clean environment.

The fishing industry is important to the character and appeal of coastal towns

- 88% of Victorian tourism operators surveyed say the fishing industry adds to the character of towns.
- 86% of those tourism operators say the history of fishing is an important part of the tourism offering.
- 69% of Victorians holidaymakers surveyed enjoy watching commercial fishers at work.

Seafood festivals contribute to developing tourism linkages

- The Apollo Bay Seafood Festival has helped develop Apollo Bay into a seafood tourism destination, with economic benefits for the town. About 8,000 people visited Apollo Bay for the festival in 2019.
- The Apollo Bay Seafood Festival provides a direct connection between the industry and the public.

The professional fishing industry also benefits recreational fishers

Professional fishing and recreational fishers are often portrayed as being at odds. However, the study found evidence throughout the state that professional and recreational activities positively intersect.

- 82% of recreational fishers are very or extremely interested in professional fishing.
- Recreational fishers are more likely than non-fishers to want to buy fresh and local seafood, with 82% saying they consider origin 'very' or 'extremely' important versus 72% of non-fishers.
- Over 80% of recreational fishers surveyed prefer to use local, commercially caught bait.
- Infrastructure (such as wharves) servicing commercial fishing is also used by recreational fishers.
- Professional fishers often provide advice on fishing and sea conditions to recreational fishers.
- 58% of professional fishers surveyed had helped recreational users of the sea in distress in the past 5 years.



Environmental health

The near west industry contributes to managing Victorian fish stocks and the marine environment

- Data collected as part of regulatory oversight and management is used for managing commercial and recreational fisheries sustainably and monitoring ecosystems
- 82% of Victorian fish stocks assessed are classified as 'sustainable' or 'recovering'

The near west industry undertakes voluntary practices aimed at improving fish stocks and the environment

- The fishing industry in the near west undertakes voluntary activities to improve sustainability and environmental health, including
- A voluntary code of practice for Victorian bay and inlet fisheries.
- Installation of devices for avoiding seabird interactions.
- Taking part in the Clean Green Program for sustainable and responsible rock lobster fishing.
- The Apollo Bay Seafood Festival holds events for children focusing on sustainability and plastics.
- The near west fishing industry voluntarily collaborates in research, particularly with the Victorian Fisheries Authority in Queenscliff:
 - Collecting samples for researchers
 - Tagging lobsters
 - Providing logistics and local knowledge
 - Sitting on advisory groups and research committees
 - Sharing accumulated local ecological knowledge gained through their fishing experience

Social fabric

Fishing contributes to the sense of identity in near west coastal communities

- 83% of residents surveyed in fishing towns agree fishing is important to heritage and identity
- In Apollo Bay, much of the community infrastructure was set up by fishing families.
- On the Bellarine, the area and infrastructure were founded on fishing. The Port Phillip Bay fishery was the first commercial fishery in Victoria and is over 170 years old. However, the industry is invisible to communities now, with the contraction of the fleet and changing affluence and demographics.
- Fishing festivals, like the Apollo Bay Seafood Festival, foster social connections and community identity

The fishing industry plays an important role in community life

- 79% of surveyed residents in fishing towns agree local fishing families are active community members.
- The near west industry donates and sponsors local events, clubs, schools and charities.
- The industry provides work, a support network and role models for vulnerable young men.



Challenges and opportunities

Increasing local production and community access to local seafood

The fishing industry on the Great Ocean Rd centres on rock lobster, which is mostly exported, while the Bellarine has experienced significant contraction with the closure of the Port Phillip Bay fishery. As a result, the supply of local seafood, particularly finfish, has diminished in the near west.

- Near west coastal communities surveyed clearly express a desire for greater access to local seafood.
- Advocacy is needed for developing new, sustainable wild-catch fishing opportunities, including under-utilised and affordable species that have a viable and sustainable business model.
- Branding could be built around the provenance and unique selling points of local near west seafood.
- The seasonality of different seafood species could be promoted.
- Links between aquaculture and wild-catch suppliers, especially in the Bellarine region, could be fostered to support diversity of species and continuity of supply locally.
- Apollo Bay could redevelop the harbour area, making it a greater attraction.

Getting more local seafood on local menus

It's challenging for near west restaurants to access local seafood – 90% of Victorian hospitality businesses surveyed say the price of local seafood has increased in the last few years, and 78% say it has been difficult to source. In the near west specifically, restaurants say prices are high compared to imports. Outside boutique restaurants, there's a perceived lack of capacity to cook local seafood. Possible solutions include:

- Collaboration between fishers, wholesalers and hospitality businesses to improve local supply chains.
- Strengthening of the hospitality industry's capacity to work with locally produced and seasonal seafood.

Developing fishing and seafood tourism experiences

Fishing and seafood tourism experiences are limited in the Bellarine, while in Apollo Bay there is an opportunity to capitalise on the existing tourism from Great Ocean Rd visitors. Victoria-wide, 54% of tourism operators agree the local tourism offering suffers from a lack of access to seafood and there are limited fishing tourism activities.

- Tourism stakeholders see an opportunity for partnerships with the fishing industry, particularly with the growing self-drive Asian tourist market on the Great Ocean Road, and with the interest in rock lobster.
- Subject to a greater supply of finfish, the Bellarine could also capitalise on regional tourism by partnering with tourism stakeholders and restaurants.
- Fishers and tourism stakeholders could also co-develop other tourism opportunities.

Increasing fishing industry engagement with communities

The fishing industry isn't always well understood among the general public – whether in metropolitan areas or in coastal communities themselves. Improving engagement with the public could help address misperceptions, reduce tension and conflict, build support for the industry and strengthen its future. Industry-led engagement activities with coastal communities could improve awareness of the fishing industry in the near west, by fostering cross-sector and cross-industry relationships within communities and regions.



