

Fish & Game New Zealand
Licence holder research 2023
Licence holder perceptions and attitudes towards Fish & Game New Zealand

July 2023



1. Executive summary

Following previously reported research on public perceptions towards Fish & Game New Zealand a project was initiated to gain licence holder insights and attitudes towards the organisation and its activities. This work was conducted in two parts. Firstly, a set of licence holder in-depth interviews (ten fishing and five hunting) was conducted to generate early insights which were further tested in a quantitative survey to provide statistically significant data.

This report contains both the deep insights from interviews and the quantitative survey data (an online survey of n=2090 licence holders). This research indicates that Fish & Game New Zealand has a high level of awareness amongst licence holders with most claiming some or a lot of knowledge of the organisation. This corresponds well with previous public research which indicated a wider public awareness of Fish & Game, without great depth on its activities.

Overall, Licence holders know a reasonable amount about Fish & Game New Zealand and most think they are doing a good job. However older licence holders are more likely to know more about the organisation and think that Fish & Game are doing a good job and young licence holders were less likely to hold this view.

Nine activity areas were tested for licence holder responses and prioritisation. A challenge for the organisation is that all were agreed (to varying levels) by participants. This suggests that Fish & Game have accurately assessed licence holder expectations of activity. The challenge is in prioritising and resourcing when it is unlikely that Fish & Game can deliver effectively across all areas.

However, the research did show that 'working to improve public access' was most important.

The three environmentally focused activities all rated very highly as being important areas to focus on. And these were 'monitoring and researching for improved water quality and species health', 'protecting the natural values of lakes, rivers and wetlands', and 'establishing water conservation orders to legally preserve the natural values of lakes and rivers'.

The aspects that all licence holders liked most about freshwater fishing were that it was 'good for improving mental and physical wellbeing', 'an important part of New Zealand's outdoor heritage' and 'a good activity to share with family and friends'.

The aspects that all licence holders liked most about game bird hunting were that it was 'an important part of New Zealand's outdoor heritage' and it was 'a good activity to do together with family and friends'.

Both fishing and hunting licence pricing was regarded as reasonable by most, with anglers seeing slightly more value than hunters, who felt there were less room for price increases.

The magazine is well supported and most prefer to receive it as a hardcopy; however, one quarter of licence holders did indicate a preference to receive a digital version of this publication.

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2. Key findings

Key findings

Awareness of Fish & Game New Zealand

- Most respondents (90%) declared some understanding of Fish & Game New Zealand and what it does.
- Declared knowledge of Fish & Game was highest amongst those over 50 years old (95%) and lowest in those under 35 years (83%)

Perceived Performance

- Approaching half of the respondents (45%) declared that Fish & Game New Zealand is doing a good job.
- A large group (44%) was made up of neutral (25%) or unsure (19%) respondents
- The remaining 11% believed that Fish & Game New Zealand was doing a bad job.
- As with awareness, performance rating was higher with an older cohort (52%) than those under 35 (36%).
- There was a significant spread of perceived performance across regional New Zealand with Northland most positive (77%) and Southland least positive (31%) about Fish & Game performance.
- Of those who indicated good performance by Fish & Game (45%), environmental advocacy and protection was the most commonly identified reason.
- Of those who identified poor performance by Fish & Game (11%), the most commonly identified reason for this was perceived neglect of the environment and wildlife.

Prioritisation of activity

- The top two priority areas identified from a list of nine were: 'ensuring public access to natural waterways' (88%), and 'monitoring and researching to improve freshwater and species health' (86%).
- The bottom two priorities were: 'working to increase family and female participation' (56%) and 'teaching people, the skills of fishing and hunting' (54%), noting that these were still ranked 'important'.
- This presents a challenge for Fish & Game in prioritisation and resource allocation, as it demonstrates that all activity areas presented were considered important. This was validated in the public focus groups and in the licence holder interviews.

Fishing – motivations, values and frequency

- The top three motivations and values identified for fishing were: 'it is good for improving mental and physical health' (88%), 'it is part of New Zealand's outdoor heritage' (87%), and 'it is a good activity to do with family and friends' (85%)
- The bottom three motivation and values identified from the list were: 'it is an activity that has positive impact on local communities and economies' (69%), 'it is an accessible and relatively in expensive hobby for New Zealanders' (58%), and 'it is a great way to help some families put food on the table' (57%)
- Note that as with activity prioritisation above, all the presented options for values and motivations were agreed by a majority of respondents

Key findings

- Just over half (51%) of current and previous licence holders indicated their fishing frequency as once or more per month.

Fishing – licence usage and attitude

- A small majority of anglers (51%) indicated their fishing frequency as once a month or more.
- The majority (89%) of respondents indicated that they purchase full season licences.
- The majority (65%) consider licence cost to be reasonable or low. At a regional level Southland showed the greatest resistance to licence pricing (31%).
- Many anglers (52%) indicate they intend to fish more in coming years. Otago residents appear to be the keenest with 64% indicating a likelihood that they will fish more.
- Overall, there is no indication from current or previous licence holders that support for and participation in fishing is likely to decrease.

Game bird hunting – motivations, values and frequency

- Game bird hunting licence holders were asked to identify their response to key motivations, and values for hunting. The top three were; ‘an important part of New Zealand’s outdoor heritage’ (71%), ‘a good activity to do with family and friends’ (68%), and ‘good for improving, mental and physical health’ (63%).
- The bottom three were; ‘making a positive impact on local communities and economies’ (50%), ‘an activity for all kinds of people’ (50%), and ‘an accessible and relatively inexpensive sport’ (32%).

- There is less positive agreement for hunting values and motivations than observed by fishing licence holders
- Men were more likely to agree with suggested values and motivations for hunting than women
- Those hunting licence holders living in rural areas were more likely to agree with the motivations and values than those in metropolitan areas.
- Men under 35 years were more likely to have purchased a hunting licence in the last two years (53%)
- Hunting licence holder attitude towards licence pricing is fairly evenly split with 45% feeling pricing is about right, 47% feeling it is too expensive and 6% willing to pay a bit more. Among fish licence holders the same figures were 54% about right, 34% too expensive and 11% willing to pay a bit more. This shows a slight upside among anglers for potential pricing increase.
- 58% of respondents overall indicated they hunted once a month or more during the season. The Auckland/Waikato region showed a higher (73%) of hunters hunting once a month or more and Southland a lower level (37%).
- The great majority of hunters anticipate that they will do the same or more game bird hunting over the next few years (93%).

3. Research methodology

Note on methodology

- *This report contains both qualitative (In-depth interviews) and quantitative results (online survey).*
- *The quantitative results are reported in charts and tables, and these provide definitive information to support decision making.*
- *The qualitative results should be viewed as supporting information that is included to help provide a bit more understanding into the lives of licence holders.*
- *A primary focus of the in-depth interviews was to inform the design of the on-line survey.*



Research methodology – qualitative

In-depth interviews

- 15 in-depth interviews were conducted with Fish & Game licence holders
- Interviews were carried out between 17 April and 18 May
- These were made up of ten fishing licence holders and five hunting licence holder interviews
- Interviewees were recruited from the Fish & Game database and invited to participate with an incentive of a \$50 Hunting and Fishing voucher offered.
- Participants were selected from the database to give a range of region, age and gender
- Each interview lasted around 40 - 50 minutes and followed a discussion guide that traversed key lines of enquiry (see across the page) and also allowed licence holders to share what was important to them.

Lines of enquiry

Each interview explored four key topics:

Background including time in the sport and regularity of participation

1. Motivations, values and drivers for fishing / hunting
2. Attitudes and beliefs about Fish & Game NZ
3. Attitudes towards licencing and pricing.



Research methodology - quantitative



The sample selected for this study was representative of the Fish & Game Licence holders database. Fish & Game New Zealand provided us with an extract of 15,000 licence holders that were randomly survey. To ensure representativeness the data was weighted to age, gender and region. See appendix for fuller explanation of the sample



We invited Licence holders to participate via email invitations, and to increase response rate we sent several email reminders.



The survey was in the field from the 1-14 June 2023.



The sample achieved in this survey was $n= 2090$. For this size sample the margin of error at the 95% confidence level for a 50% figure is $\pm 2.1\%$.

4. Qualitative research

Licence holder interviews

Fishing Interviewee characteristics



- **Geographic Location:** Interviewees were spread across both North and South Island in various locations including Central North Island, Taranaki, Nelson, North Canterbury, Christchurch, Queenstown Lakes, and the Wairarapa.
- **Experience:** Most of them have been fishing for a significant part of their lives, some since childhood, often introduced to the sport by a family member. Some had re-engaged with fishing after a break, while a few only recently started river fishing.
- **Type of Fishing:** The majority of them preferred fly fishing and river spin fishing with some practicing catch-and-release.
- **Frequency:** Their fishing frequency varied from a few times a month to every couple of days, often depending on weather conditions.
- **Fishing Locations:** They typically fish in local rivers, lakes, and sometimes dams. Many also travel to other parts of the country for fishing expeditions. Some also fished overseas, particularly in Australia and the UK.
- **licencing:** They were all current fishing licence holders. While some have held licences for many years, a few have held a licence for only the last two years.
- **Clubs and Associations:** Some of them are members of local fishing clubs, e.g. the Canterbury Fly Fishing Club.
- **Outdoor Interests:** Besides fishing, many also participate in hunting and tramping, highlighting an overall love for the outdoors.

Fishing Interviewee motivations and values associated with fishing:



- **Escape – mental health:** Many of the interviewees love fishing as a means of escaping from the busyness of life and entering a relaxed, mindful state. They value the solitude and tranquillity provided by fishing, allowing them to disconnect and clear their heads.
- **Connection to Nature:** Interviewees cherish being outdoors, exploring new areas, and being in beautiful environments, such as rivers and the backcountry. They value the locations fishing takes them to and enjoy being at one with nature.
- **Family and Community Bonding:** Several interviewees have shared experiences with family members, using fishing as an activity to pass on skills to their children or to spend more time with them in the outdoors. Some interviewees also find community and friendship through activities like joining a local fishing club or participating in an online group.
- **Gender Equality:** One interviewee, in particular, expressed passion about women in fishing and has faced and acknowledges the existence of sexism in the activity. This individual values inclusivity and would like to see more women involved in fishing.
- **Learning and Mastery:** Some interviewees are motivated by the thrill of the chase, stalking fish, spotting wildlife, and reading topography to identify good spots for fishing. For them, fishing isn't solely about the catch but the process, skills, and knowledge required.
- **Sustainability:** Catch-and-release practices and voluntary work for Fish & Game indicate a value of sustainability and conservation. These individuals show an understanding of and respect for maintaining fish populations and their habitats.
- **Self-Reliance:** Fishing for some is a means of providing food for their families, showing a value of self-reliance.
- **Consistency and Commitment:** Some of the interviewees have a goal of fishing one to two times a month, showing a commitment to the activity and valuing consistency in the experience of it.

Fishing Interviewee attitudes towards Fish & Game New Zealand



- **Access and Advocacy:** There are concerns about public access and perceived declines in access rights. Interviewees value Fish & Game's focus on maintaining access rights and suggest leveraging the network of skilled members for supporting access initiatives. There were mixed opinions about Fish & Game's advocacy efforts and their effectiveness in engagement with Iwi.
- **Water Quality and Conservation:** The interviewees emphasise the importance of water quality and express concerns about its decline. They appreciate Fish & Game's efforts in managing water quality, monitoring fish stocks, and protecting species. There is recognition of the need for balance between trout (introduced species) and native species.
- **Female Participation:** There is a strong interest in encouraging and including more female in fishing activities. The interviewees recognise that there may be barriers to entry and suggest creating pathways to engage urban female in the sport.
- **Promotion and Engagement:** The "Take a Kid Fishing" program is highly praised and seen as successful. The mental health benefits of fishing and the opportunity to meet new people on the river are also highlighted. The interviewees appreciate Fish and Game's strong brand, accessible staff, and their efforts to raise awareness of the sport and its benefits.
- **Communication and Awareness:** Some interviewees express a desire for greater awareness of Fish & Game's activities and better communication of their achievements. They appreciate newsletters, emails, and magazines as sources of information. The interviewees suggest improvements such as more workshops, sustainability guidance, and increased volunteer opportunities.
- **licencing and Enforcement:** Overall, there is support for licencing and enforcement efforts by Fish & Game. Some interviewees express concerns about unlicenced fishing and call for greater enforcement and awareness of licencing requirements.
- **Perception and Reputation:** Interviewees rate Fish & Game NZ highly, praising their work and communication efforts. However, there are also licence concerns of limited awareness and understanding of Fish & Game's remit and conservation role among the general public.

Fishing Interviewee attitudes towards licencing



- **Purchasing Habits:** licence holders tend to purchase annual licences, often at the beginning of the season, typically in September or October. They prefer buying licences online for its convenience, ease, and effectiveness. Some also mention purchasing from retail stores like hunting and fishing shops.
- **Pricing and Value:** Overall, licence holders interviewed believe the pricing is fair and reasonable, considering the access it provides to fishing opportunities. They express satisfaction with the value for money they receive. There are suggestions that non-resident anglers, especially overseas visitors, could pay more for licences. A few interviewees felt there was scope for price increase. This point was further quantified in the survey results.
- **Range of licence Options:** licence holders appreciate the availability of different licence options, such as one-day or three-day licences, but many prefer the full annual licence. Some mention the backcountry licence having too many rules and suggest simplifying the process. There is no significant dissatisfaction with the range of options available.
- **licence Purchase Experience:** The online licence purchase process is praised for being easy, effective, and user-friendly. The website navigation is mentioned as being straightforward. Some licence holders also mention receiving email reminders, which they find helpful.
- **Suggestions for Improvement:** There were a few suggestions for improvement, such as offering reduced pricing for loyal anglers, particularly older ones who may venture out less frequently. Additionally, there are calls for clearer information about the work done by Fish & Game NZ to better understand how their licence fees contribute to these efforts.
- **Concerns for Overseas Family Anglers:** Some licence holders expressed concern at the high cost of fishing for visiting family members from overseas, suggesting the need for special pricing options or exemptions for those who are not specifically coming to New Zealand for fishing purposes.

Overall, licence holders appear satisfied with the licencing process, pricing, and value they receive. They appreciate the convenience of online purchases, the range of options available, and the access provided by their licences.

Fishing Interviewee verbatim quotes

"Meeting and engaging with new people you meet on the river is great."

"The mental health benefits of fishing and being in the outdoors are huge."

"Women are really interested, Fish & Game could do more to encourage and include their participation."

"We need to know more about the level of predation on native species and find a way to balance habitats for both."

"There is a mindfulness in the technical skills required to fly fish."

"Fish & Game need to do more than just consult; they need to prove to Iwi that they want to listen and work together."

"I would like to see greater encouragement of catch and release, general guidance on sustainability, and volunteer weekends for clean-ups."

"I would like to see greater effort on water quality, general conservation, and protection of the fishery."

Hunting Interviewee characteristics



- **Geographical spread:** The interviewees were spread across various locations in New Zealand, with individuals living in both North and South Islands.
- **Early Introduction to Hunting:** Most were introduced to hunting at an early age. For instance, one started hunting around the age of 12 through his brother, while another began game bird hunting with his father.
- **Experience:** There was a considerable range of experience among the interviewees. One of the interviewees has been duck shooting consistently all his adult life and another has been involved in duck shooting for the last 25 years. On the other hand, a 21-year-old female interviewee has been involved in game bird hunting for only few years but has not missed a season.
- **Hunting Locations:** Their hunting activities are primarily carried out on farms and farm ponds, including a farm pond near Waipara, on their own farm, or on nearby farms.
- **Other Activities:** In addition to game bird hunting, interviewees were often hunters of other game and/or current or previous anglers. One of the younger hunters is also an active clay bird shooter and has represented New Zealand in this sport.
- **Annual Engagement:** Duck shooting opening weekend is a significant event for several of the interviewees, indicating an ongoing and enthusiastic commitment to the sport.

Hunting Interviewee motivations and values associated with game bird hunting:

- **Connection to Nature:** Hunting licence holders are motivated by the opportunity to be in the outdoors and explore spectacular places in nature. They appreciate the experience of getting out of the city and into the country, enjoying the beauty and serenity of natural environments.
- **Shooting Sports:** Shooting sports play a significant role in the lives of hunting licence holders. They see hunting as a way to engage in shooting activities, which they find enjoyable and fulfilling. Some may have a background in clay target shooting and hunting clubs.
- **Food and Sustainability:** Putting food on the table is a key motivation for hunting licence holders. They value the ability to provide for themselves and their families by harvesting game animals.
- **Pest Control:** Hunting licence holders recognise the importance of pest control. They view hunting as a means to actively participate in managing and reducing pest populations, contributing to environmental conservation efforts.
- **Social and Family Bonds:** The social aspect of hunting is highly valued by licence holders. They enjoy shooting together with their fathers, sons, and whole families. Hunting becomes a way to maintain traditions and pass down the sport from one generation to the next. The camaraderie and shared experiences with friends and family are seen as integral parts of hunting.
- **Skill Development and Challenge:** Hunting licence holders appreciate the effort and skill required to access interesting hunting locations. They find satisfaction in the challenge of hunting and the sense of accomplishment that comes with it. Hunting serves as a way to stay occupied and engaged in a meaningful and enjoyable activity.
- **Mentorship and Access:** licence holders acknowledge the need for mentorship and connections to enter the sport of hunting. They recognise that it can be challenging for newcomers to find an entry point without guidance from experienced hunters. Mentors play a crucial role in introducing new individuals to hunting.

Overall, hunting licence holders are driven by a combination of personal enjoyment, connection to nature, sustainable food practices, pest control, and social bonding. They value the experiences, connections, and benefits that hunting provides.

Hunting Interviewee attitudes towards Fish & Game New Zealand:

- **Perception of Management:** Some hunting licence holders perceive Fish & Game New Zealand's overall management as having contradictory aims and goals. They describe the organization as disconnected at regional and national levels.
- **Limited Visibility and Engagement:** Hunting licence holders express limited awareness of Fish & Game's activities related to hunting. They rarely encounter rangers in hunting areas and do not see significant efforts in promoting or engaging with hunters as a sport. They mainly associate Fish & Game with licence checking, policy development, and rule updates.
- **Enforcement and Compliance:** There are mixed views regarding enforcement. Some hunting licence holders express the desire for more enforcement in hunting, particularly in terms of private ponds where hunting limits are often ignored. There is also a suggestion that rangers should collaborate with the police to enforce hunting regulations.
- **Water Quality and Conservation:** Hunting licence holders have varying levels of awareness regarding Fish & Game's efforts in water quality and conservation. While some have heard about Fish & Game's focus on water quality and habitat preservation, others question the organization's role and express concerns about farmers being unfairly targeted.
- **Limited Female Participation:** Several hunting licence holders note the limited presence of female hunters in the sport. They mention that female participation often occurs through family connections or other forms of hunting, such as clay bird shooting.
- **Perception of Value and Action:** Some hunting licence holders feel that they do not get much value from their licences. They express disappointment with perceived inaction or lack of visible results in local areas like wetland and game bird habitat support. They suggest the need for more research on specific species, e.g the Bittern bird.
- **Positive Aspects:** Despite the criticisms, there are also positive perceptions of Fish & Game. Some hunting licence holders appreciate the game bird hunting guide, the magazine, and the sponsorship provided for clay bird shooting competitions. They acknowledge Fish & Game's role in Fish & Game , enforcement, wetland support, and game bird counts.

Overall, the attitudes of hunting licence holders towards Fish & Game New Zealand are mixed. While there are criticisms regarding management, visibility, and perceived lack of action in certain areas, there are also acknowledgments of positive aspects and some appreciation for the organization's efforts in licencing, enforcement, habitat preservation, and sponsorship.

Hunting Interviewee attitudes towards hunting licences:

- **Purchase Behaviour:** Hunting licence holders indicate that they buy a full season adult licence annually. They prefer the convenience of purchasing their licence online, which they find easy and effective. Some mention purchasing their licence at hunting and fishing stores.
- **Pricing:** Overall, hunting licence holders perceive the pricing of the licence as reasonable or okay. They acknowledge that the price may be considered dear but not excessively so.
- **Options and Value:** Hunting licence holders appreciate the range of licence options available to them. They believe that having options is beneficial. However, some express a sentiment that as the pricing increases, they do not perceive a corresponding increase in the value for money associated with the licence.
- **Communication and Information:** Hunting licence holders mention varying levels of awareness regarding newsletters etc. Some state that they do not receive any information, while others are not aware of the newsletters they may be receiving. They generally find the magazine to be good but note that it mainly focuses on fishing stories.
- **Unlicensed Shooters:** There is a suspicion among hunting licence holders that there are many unlicensed shooters, particularly those shooting on private land in their area.

Overall, hunting licence holders demonstrate a generally positive attitude towards licencing. They find the purchasing process easy and appreciate the range of licence options available to them. While they find the pricing reasonable, they do not necessarily see a need for price increases.

Hunting Interviewee verbatim quotes

"Never see anything happening from Fish & Game."

"Fish & Game seem to be more South Island focused."

"Public should have access to game bird hunting and fishing areas as long as they do not risk farmers running their own businesses."

"Shooting sports are a big part of my life."

"Fish & Game need to reengage a volunteer force."

"Woman enter game bird hunting through family connection and other forms of hunting or often clay bird shooting as well."

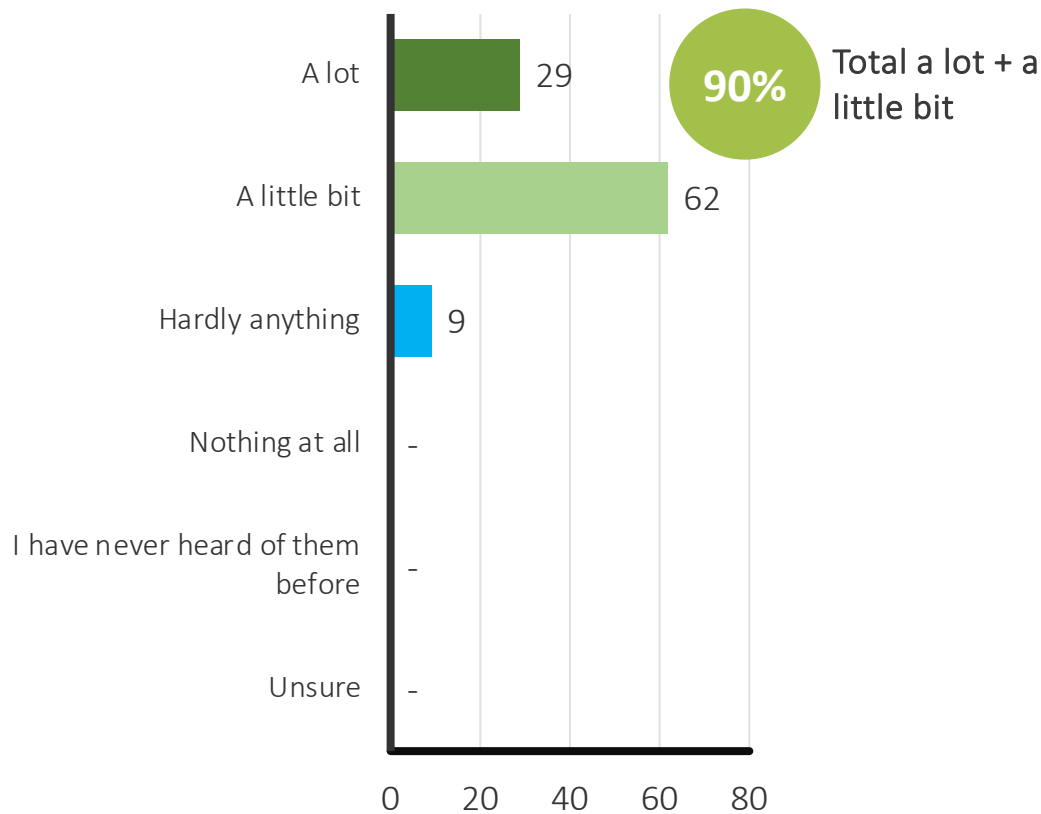
"There is a general population wariness around firearms."

"Support for wetlands and game bird habitats seems more like talk than visible action."

5. Quantitative Survey Results

Most licence holders declared knowledge of fish & Game, with a trend towards older licence holders knowing more

Q. How much would you say you know about Fish & Game New Zealand? (%)



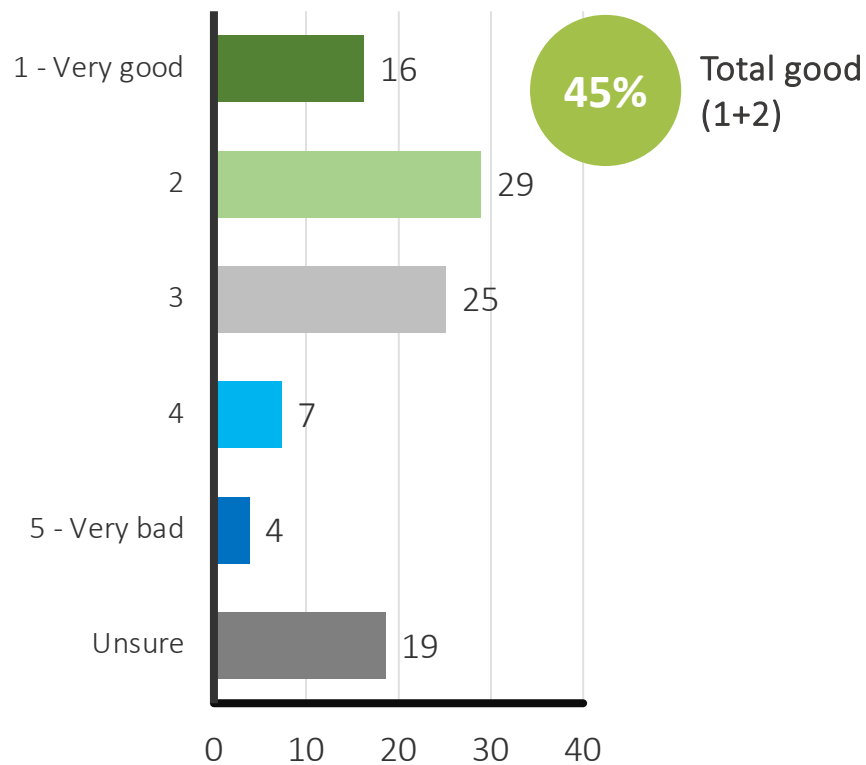
Older respondents were more likely to claim a lot or a bit of knowledge:

- Under 35: 83%
- 35-49: 88%
- 50-64: 94%
- 65+: 96%

Base: All respondents (n=2090)

Licence holders lean towards believing Fish & Game are doing a good job, once again, older licence holders tend to be more positive

Q. How good or bad a job would you say Fish & Game New Zealand does on your behalf? (%)



Older respondents were more likely to say Fish & Game is doing a good job:

- Under 35: 36%
- 35-49: 41%
- 50-64: 50%
- 65+: 54%

Those in the following regions were more likely to give a positive rating: Northland (77%), Eastern (55%) Nelson/Marlborough (64%). Those in Southland (31%) gave a lower positive rating.

Base: All respondents (n=2090)

Fish & Game good performance reasons



of total respondents

Q. What are the main reasons you think Fish & Game does a good job on your behalf? (% coded)

Environmental Advocacy and Protection: Efforts to protect and restore natural resources, including fisheries and wetlands. Role in promoting environmental health, reducing pollution, and preserving habitats	22
Resource Management: Fish & Game's role in effectively managing Fish & Game populations. Includes stocking lakes, maintaining the health of game species, and managing fishing and hunting licences.	16
Public Service and Support: Assistance in various ways - from providing educational information and advice to representing sportspeople's interests at government level. The quality of communication and availability of resources (like the F&G website).	15
Recreational Access and Support: Fish & Game's role in promoting access to recreational areas for fishing and hunting, as well as supporting and promoting sports fishing and game bird hunting.	14
Regulation and Enforcement: Setting and enforcing rules, such as hunting regulations, fishing licence requirements, and protection against poaching.	13
Community and Stakeholder Engagement: The agency's work in collaboration with landowners, government agencies, and other stakeholders. Furthermore, the agency's work in raising awareness, leading public debates, and advocating for hunters and anglers' interests.	11
Research and Data Collection: Their role in collecting data and conducting research for better understanding and predicting the future of the game and fisheries.	2
Transparency and Accountability: Appreciation for the visibility of the agency's operations, noting the visibility of rangers or the agency's efforts to keep the public informed.	2
No comment/Unsure	39

Base: Respondents with a positive view of Fish & Game (n=1023)

Fish & Game neutral performance reasons

25% of total respondents

Q. What are the main reasons you gave Fish & Game a rating of 3 for the job they do on your behalf? (% coded)

Access and Visibility: Difficulty accessing fishing and hunting locations, either due to restrictions or poor maintenance of entry points. Also, a desire for greater visibility of Fish & Game's efforts, such as more information about their local work.	14
Enforcement and Presence: Lack of officers monitoring the areas they frequent. Concerns about the lack of enforcement of fishing and hunting rules, such as overfishing, illegal fishing, or fishing during unauthorized hours.	12
Resource Management and Stocking: Perceived decline in Fish & Game populations, suggesting that Fish & Game could improve. Includes need for better maintenance of habitats and increased releases of hatchery fish.	11
Communication and Advocacy: Fish & Game's role in advocating for their interests and improving effective communication about what the organization does on their behalf. This includes better explanations of regulations and more public recognition of the sport's positives.	10
licencing and Fees: Fees are too high for the value they receive or higher fees for foreign anglers, to fund additional Fish & Game efforts.	8
Balance of Interests: Concerns about Fish & Game's balance of focus between fishing and game hunting. Also, a perceived anti-farming stance, and catering too much to overseas tourists	7
Water Quality and Conservation: concerns about declining water quality and the impact this has on fish populations. They would like to see more proactive efforts towards conservation from Fish & Game.	4
Regional Variation: Fish & Game's effectiveness and visibility can vary widely by region, with some areas appearing to receive more attention or resources than others.	3
Political Stance: Discontent with Fish & Game's political positioning, such as their stance on gun laws or environmental issues.	3
Local Community Involvement: More local community involvement in decision-making processes to better represent the interests of local anglers and hunters.	1
No comment/Unsure	48

Base: Respondents with a neutral view of Fish & Game (n=507)

Fish & Game bad performance reasons



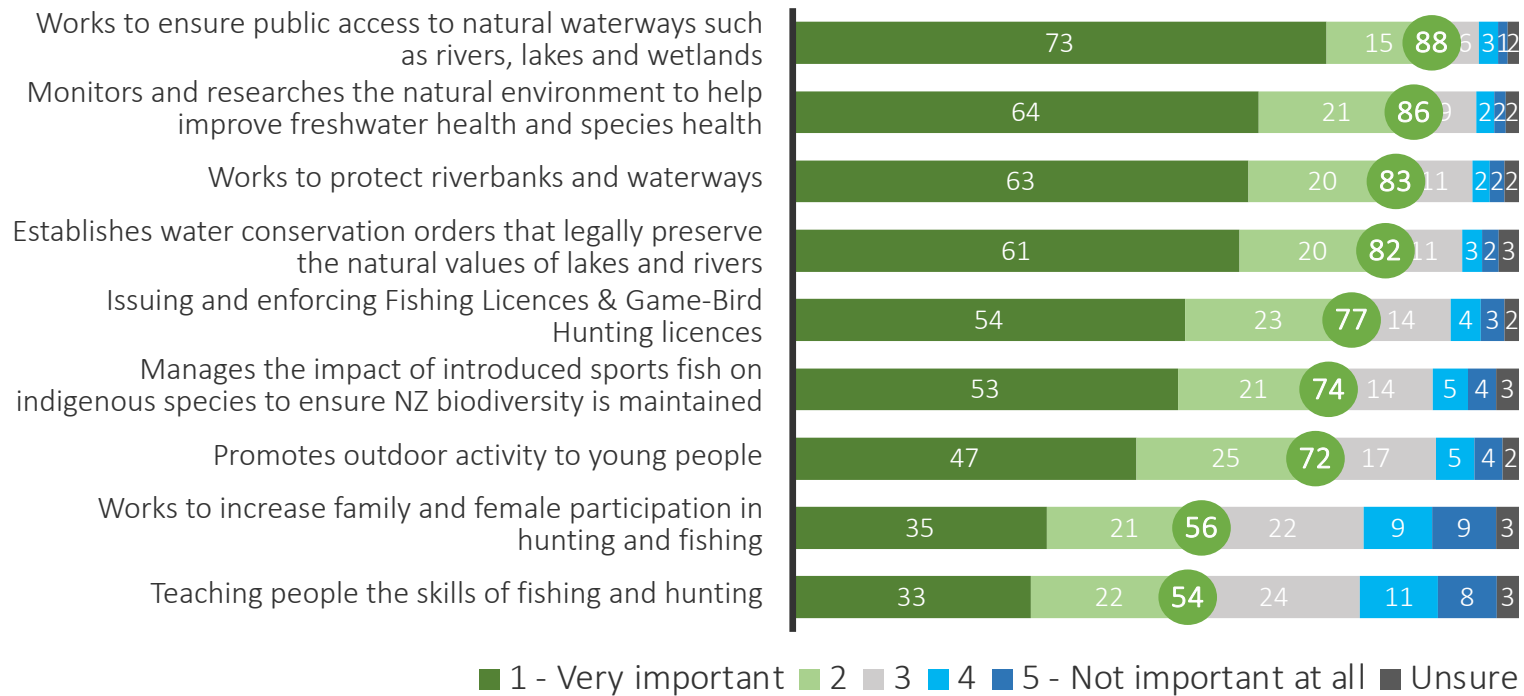
Q. What are the main reasons you think Fish & Game does a bad job on your behalf? (% coded)

Perceived Neglect of Environment and Wildlife: Perception that Fish & Game is not doing enough to protect the environment, clean up polluted rivers, and maintain wildlife populations.	25
High Cost of licences: Concern about the high cost of licences, especially given the perceived lack of value they receive in return.	16
Mismanagement of Funds: Questioning the use of the funds collected from licences, stating that they do not see any benefits or improvements in their areas. Also, that Fish & Game is spending money on unnecessary things.	16
Insufficient Monitoring and Law Enforcement: Not enough rangers or officials to monitor and enforce the regulations for hunting and fishing. Frustration over rule-breakers and illegal activities.	15
Lack of Access to Hunting and Fishing Areas: Complaints about a lack of public access to hunting and fishing areas, also voicing concerns about the overcrowding of certain areas.	12
Lack of Efforts to Promote Game Numbers: Not enough being done to promote or increase the numbers of certain game species.	12
Issues with Policy and Representation: Fish & Game is too focused on politics and doesn't represent or address the concerns of hunters and fishers effectively. Also a feeling of disconnect with the organization.	11
Conflict with Farmers: Fish & Game unfairly targeting farmers in their environmental efforts.	9
Poor Communication: Some respondents indicate that Fish & Game is not communicating well with licence holders, not listening to their concerns, or not providing enough feedback.	6
Negative Views of Organization Leadership: Dissatisfaction with the leadership of Fish and Game, criticizing include out of touch, self-serving, and not adaptable to new ways of thinking.	6
No comment/Unsure	15

Base: Respondents with a negative view of Fish & Game (n=227)

Licence holders viewed Fish & Game’s environmental activities as most important

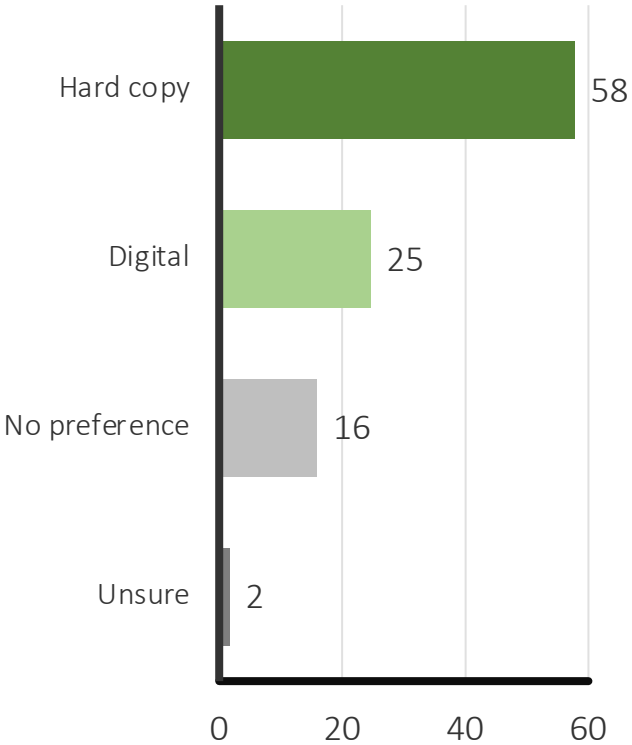
Q. As you may be aware, Fish & Game New Zealand is the organisation who manages New Zealand’s fresh water (lakes and rivers) sports fishery and game bird hunting resource, and advocates for healthy freshwater habitats including wetlands. How important do you think it is that Fish & Game New Zealand undertakes the following activities? (%)



Base: All respondents (n=2090)

Most licence holders prefer a hardcopy Fish & Game Magazine, more so among rural audiences

Q. Would you prefer to receive the New Zealand Fish & Game magazine as a hardcopy or a digital one? (%)



Those who have bought a freshwater licence were more likely to prefer digital (27%) and less likely to prefer hard copy (57%). While those who have bought a Game Bird licence were more likely to prefer a hard copy (64%) and less likely digital (19%).

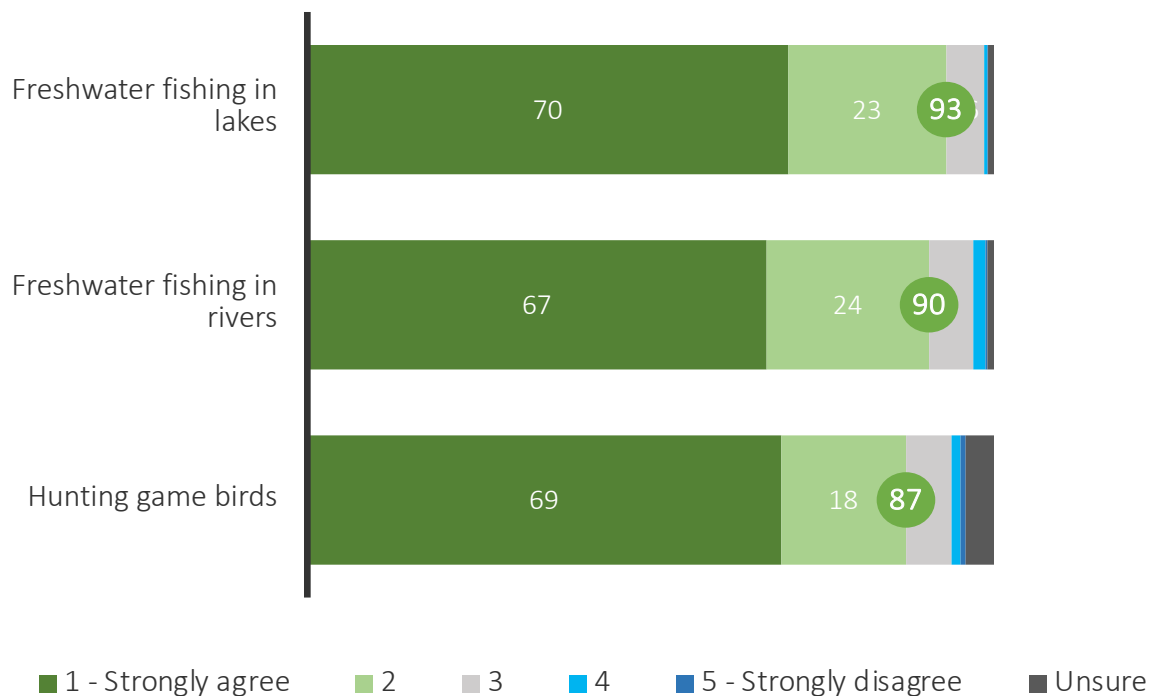
Those living in rural areas were more likely to say they prefer a hard copy (6%), compared to those in the metropolitan area (49%).

Those living in North Canterbury were more likely to prefer digital copies (33%).

Base: All respondents (n=2090)

Most Licence holders feel safe while taking part in fishing and hunting activities

Q. How strongly do you agree or disagree that over the last 12 months or so you have always felt personally safe while doing each of the following activities? If you haven't done this activity over the last 12 months or so please say so? (%)

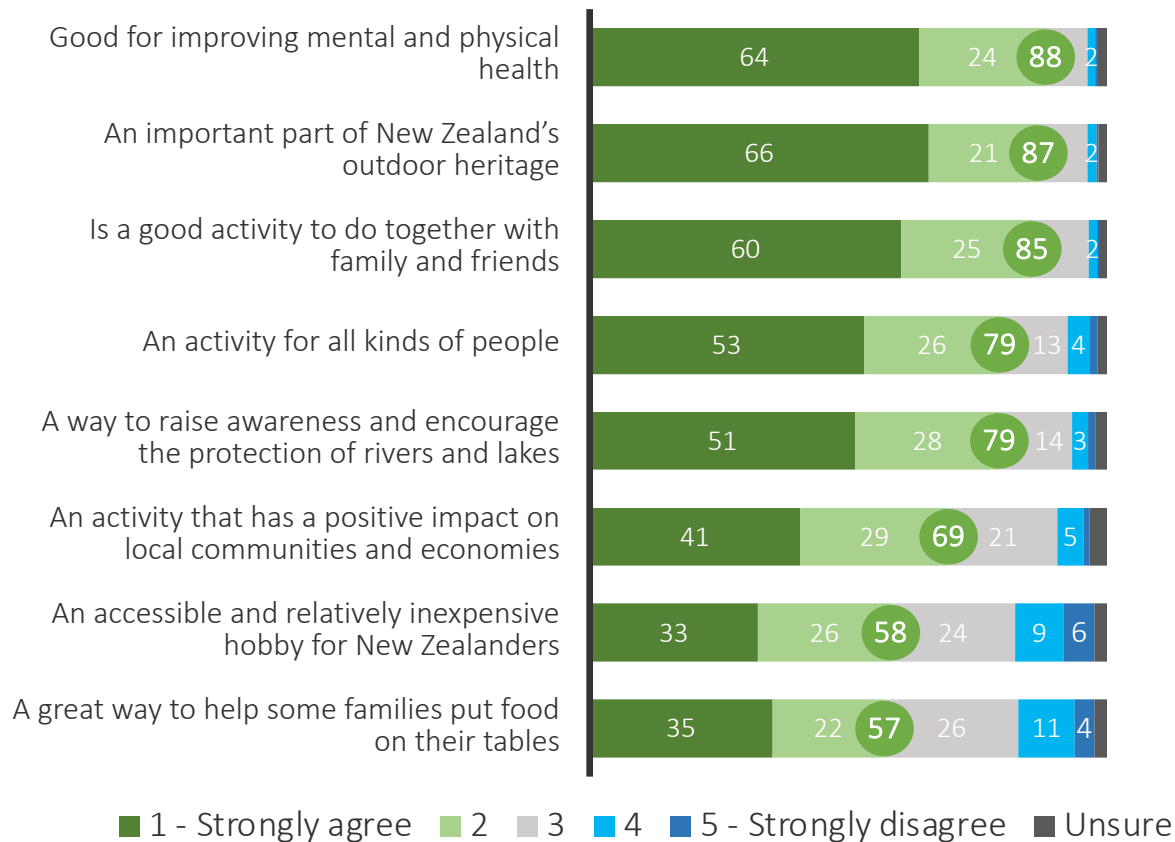


Base: Those who have participated recently (Lake fishing: n=1498, River fishing: n=1532, Game bird hunting: n=977)

6. Survey results - fishing

Most view freshwater fishing as good for their ‘wellbeing’, ‘as part or NZ’s Heritage’ and ‘a good social activity’

Q. How strongly do you agree or disagree with each of the following: Fresh water fishing is: (%)



Those in regional centres were more likely to agree that freshwater fishing is a way to raise awareness and encourage the protection of rivers and lakes (82%) compared to those in rural areas (73%).

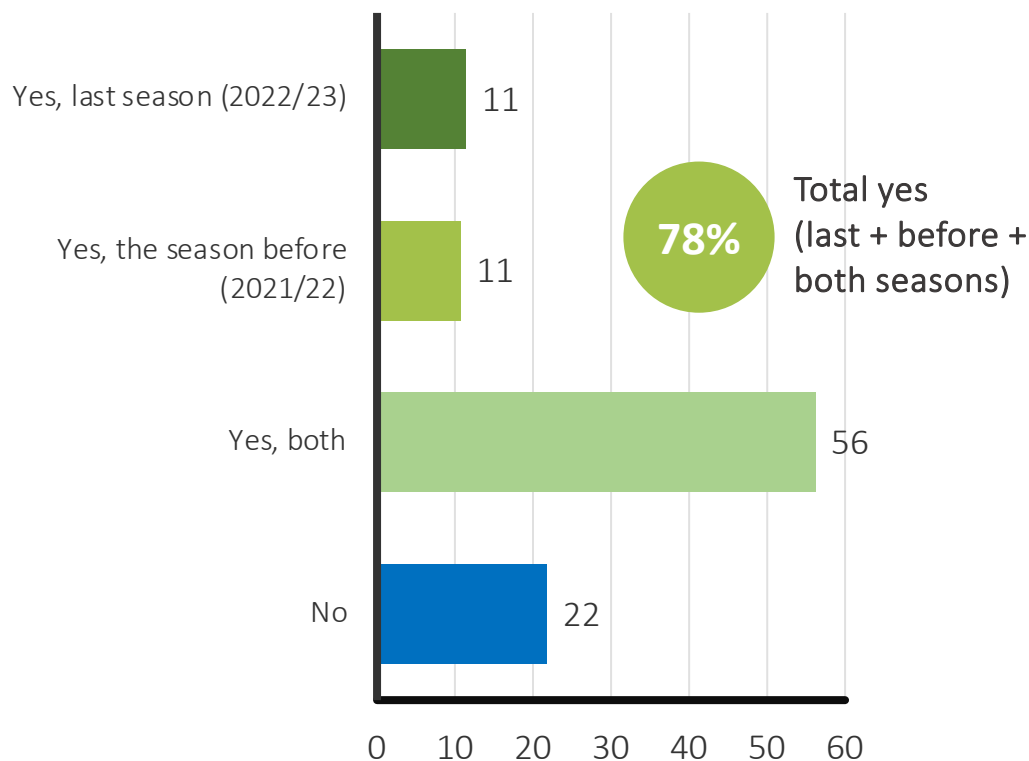
Those living in the Central South Island region were more likely to agree that freshwater fishing is good for improving mental and physical health (93%), a good activity to do together with family and friends (92%) and an activity for all kinds of people (88%).

Māori respondents were more likely to agree that fishing is ‘a great way to help some families put food on their tables’ (72%)

Base: All respondents (n=2090)

Older anglers are much more likely to have bought a licence in the past two seasons

Q. Over the last two seasons have you purchased any kind of Fish & Game NZ - freshwater fishing licence for the following periods (this excludes fishing licences for the Taupo fishing district)? (%)



Base: All respondents (n=2090)

Older respondents were more likely to have bought a licence in the past two seasons:

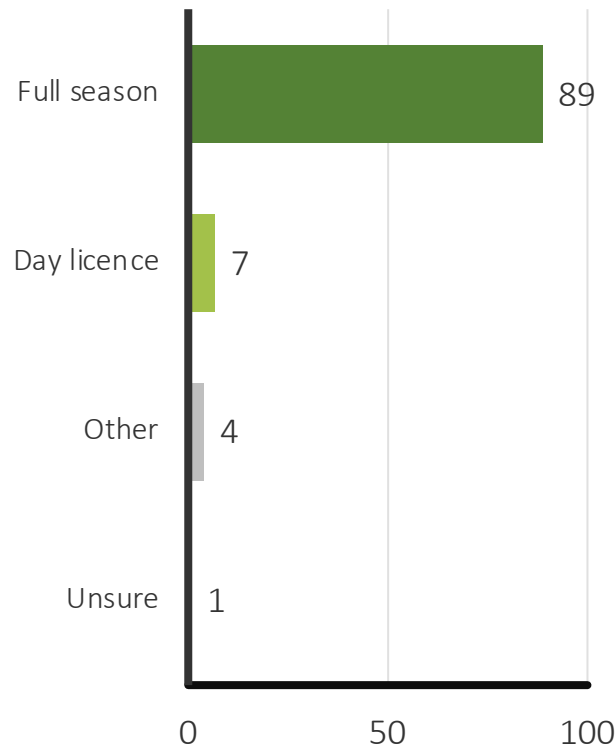
- Under 35: 67%
- 35-49: 77%
- 50-64: 82%
- 65+: 87%

6.1 Current licence holders

Past season

Males more likely to have bought a full season licence compared to females

Q. Freshwater fishing licences generally fall under two categories, which one of these did you buy to use for yourself? If you brought more than one licence please just answer this question based on the main licence that you brought to use personally. (%)



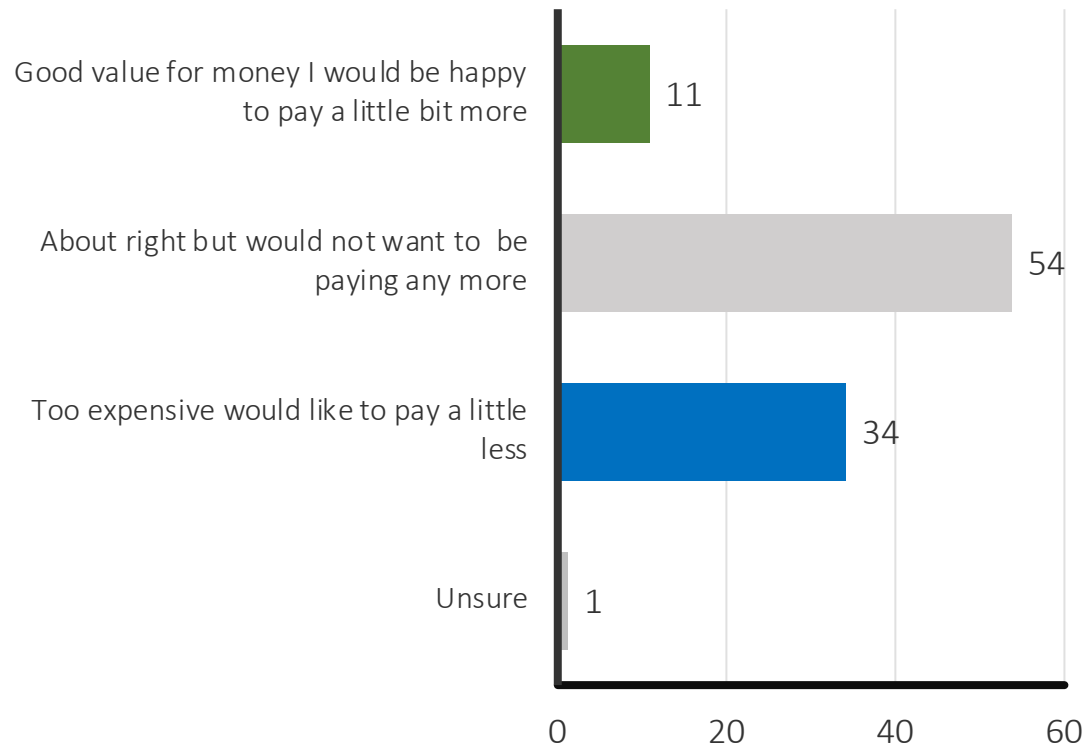
Males were more likely to say that they purchased a full season licence for themselves (90%), compared to females (71%).

Those with no dependent children were also more likely to have purchased a full season (91%) compared to those without (83%).

Base: Those who purchased a freshwater fishing licence last season (n=1451)

Most licence holders feel the price of a licence is about right, a third want to pay less and one in ten would be happy to pay a bit more

Q. Which ONE of the following best describes your view of the price of that freshwater fishing licence? (%)



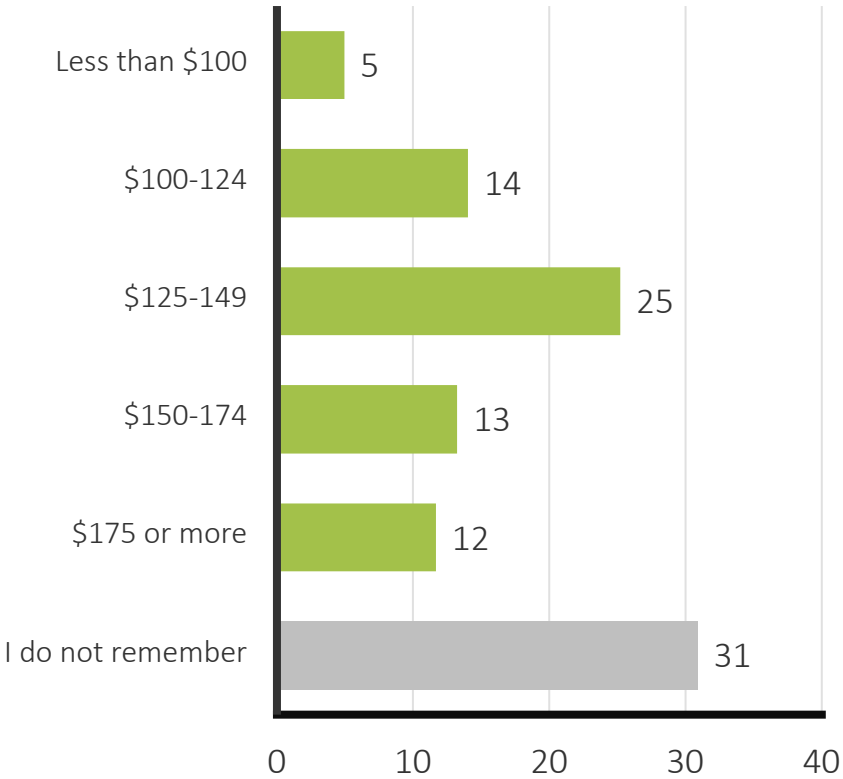
Those residing in Wellington were more likely to say the licence price was about right but not pay anymore (69%).

Central South Island and Otago residents were more likely to say the price was too expensive at 44% and 43% respectively.

Base: Those who purchased a freshwater fishing licence last season (n=1451)

Almost one third of licence holders do not recall what they paid for their licence last season

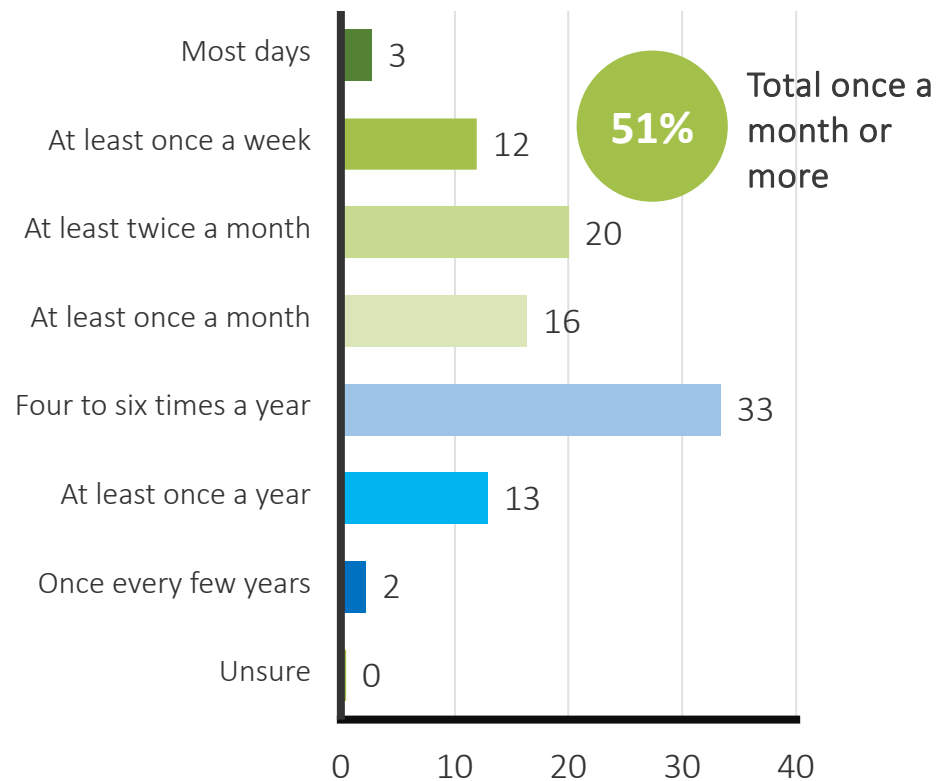
Q. How much do you recall paying for your freshwater fishing licence? (%)



Base: Those who purchased a freshwater fishing licence last season (n=1451)

Just over half of licence holder's fish at least once a month or more

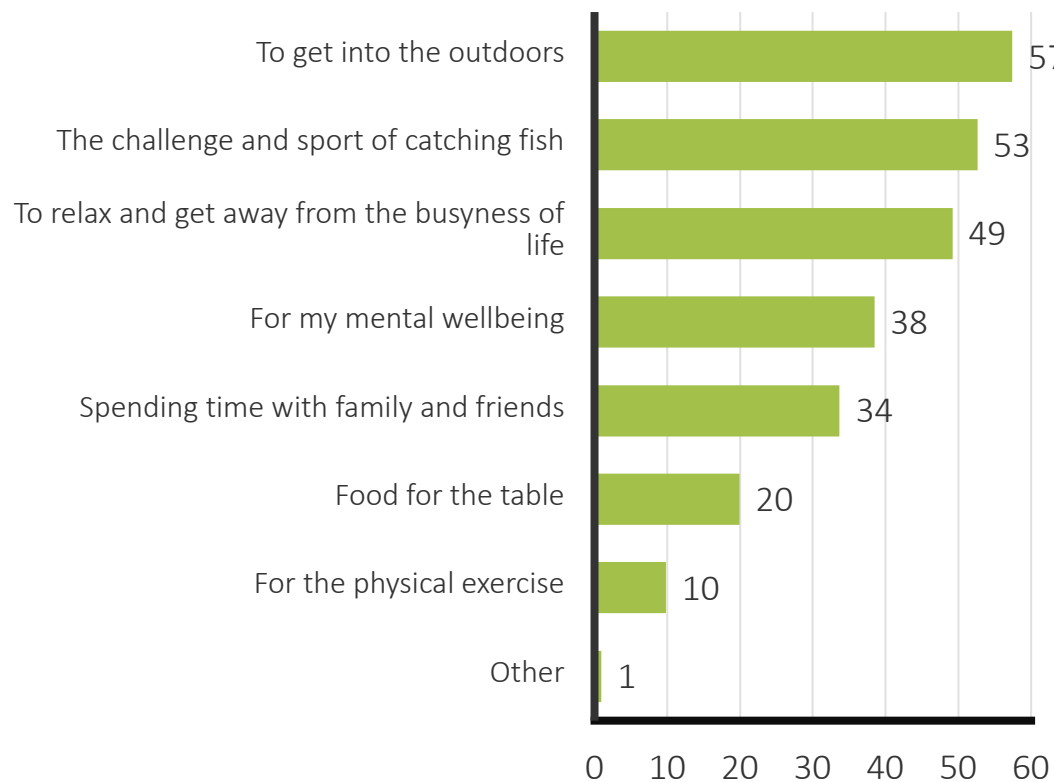
Q. During the season which of the following best describes how often you usually go freshwater fishing? (%)



Base: Those who purchased a freshwater fishing licence last season (n=1451)

Licence holders are most attracted to fishing by ‘getting into the outdoors’ ‘the challenge of the sport’ and a ‘chance to relax’

Q. What attracts you most to freshwater fishing? (%)



Younger respondents were more likely to say getting into the outdoors attracts them the most to freshwater fishing:

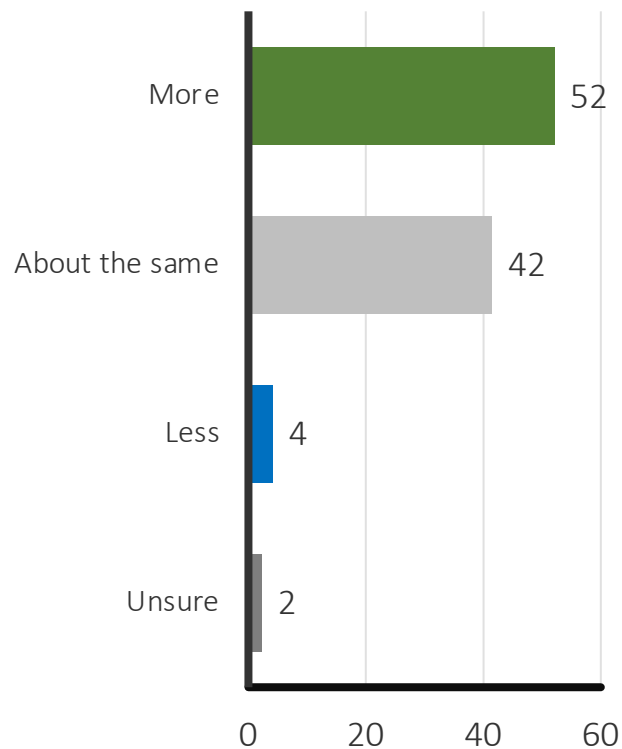
Under 35: 71%
35-49: 55%
50-64: 53%
65+: 56%

Fulltime workers were more likely to say to relax and get away from the busyness of life (54%) and spending time with family and friends (38%), compared to those not working (34%, 22% respectively).

Base: Those who purchased a freshwater fishing licence last season (n=1451)

Just over half of licence holders plan to fish more in the future, with Otago residents more likely to indicate this

Q. Over the next few years do you intend to fish more or less than you do now? (%)



Fulltime workers were more likely to say over the next few years they intend to fish more (56%), compared to part time (42%) and those not working (43%).

Those residing in Otago were also more likely (64%).

Base: Those who purchased a freshwater fishing licence last season (n=1451)

Main reason licence holders intend to fish less in the future are because of the ‘the expense’, ‘become less physically able’ and harder to ‘access local fishing locations’ - *note small sample n=66*

Q. What are the main reasons why you intend to fish less in the future? (% coded)



Base: Those who purchased a freshwater fishing licence last season and intend to fish less in the future (n=66)

6.2 Previous licence holders

Main reasons for previous licence holders not recently purchasing a licence are because of being 'too busy' and 'sport becoming too expensive'

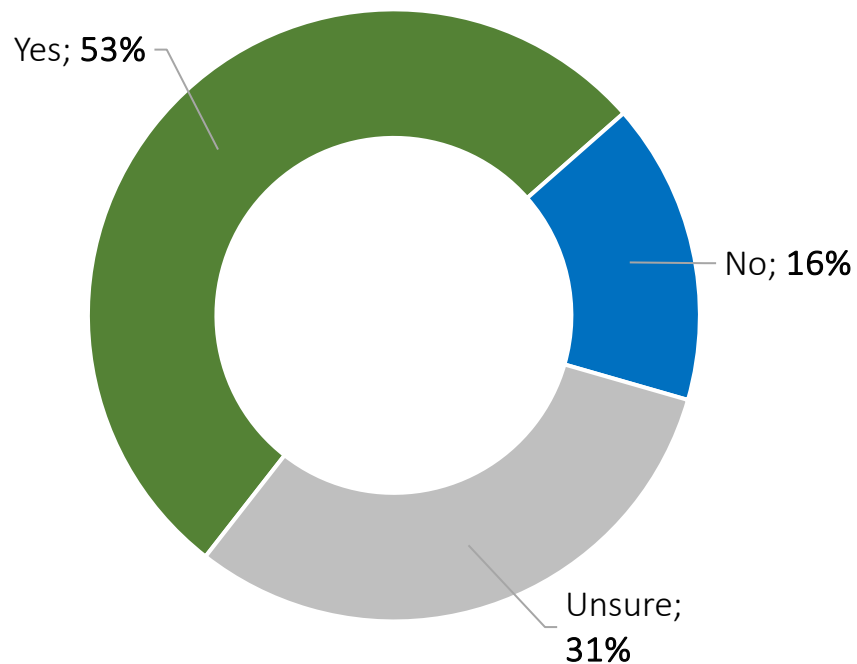
Q. What are the main reasons for not purchasing a freshwater fishing licence this season (2022/23)? (%)



Base: Those who purchased a freshwater fishing licence the season before and not last season (n=203)

Over half of those who missed buying a licence last year intend to purchase one in the next 12 months

Q. Do you intend to purchase a fishing licence (either day or season) in the next 12 months? (%)

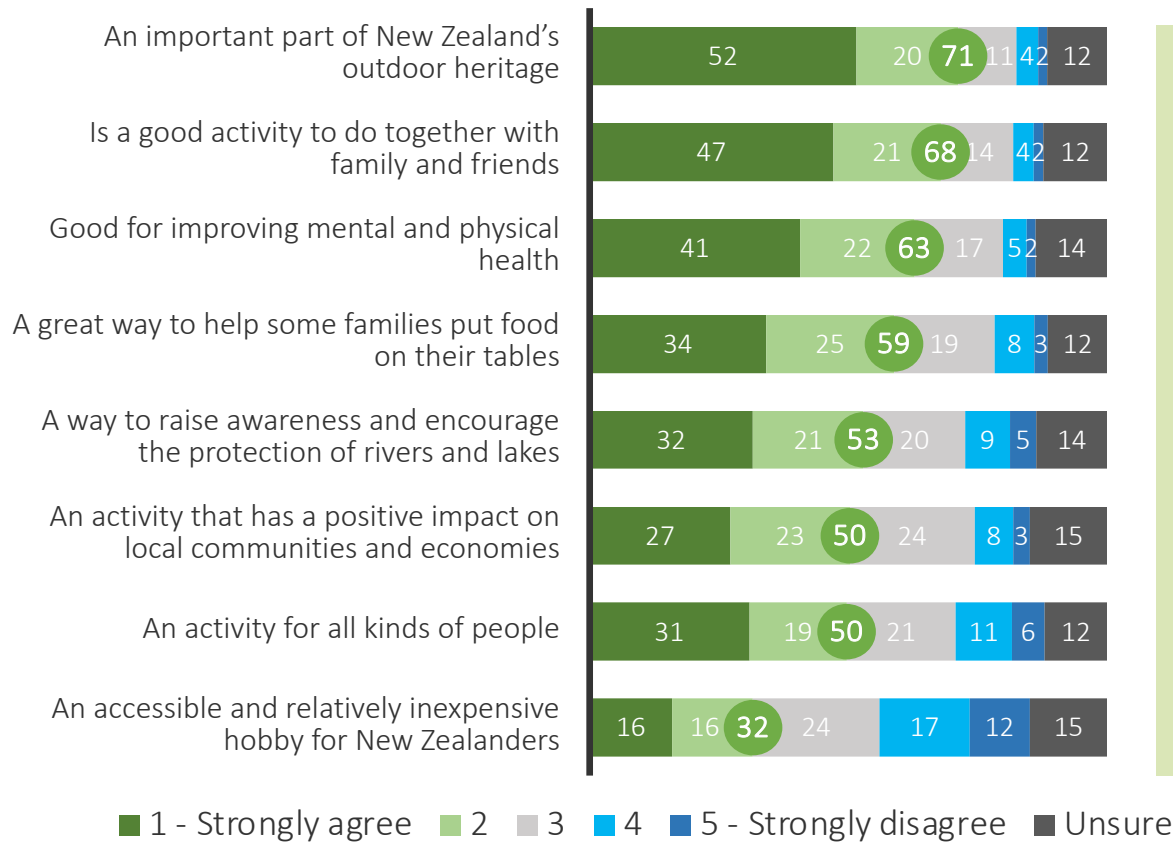


Base: Those who purchased a freshwater fishing licence the season before and not last season (n=203)

7. Game bird hunting

Both males and those in rural areas are more likely to agree with all these positive aspects of game bird hunting

Q. How strongly do you agree or disagree with each of the following: Game bird hunting is: (%)



Males were more likely to agree with all the game bird hunting reasons (32-72%) compared to females (23-58%).

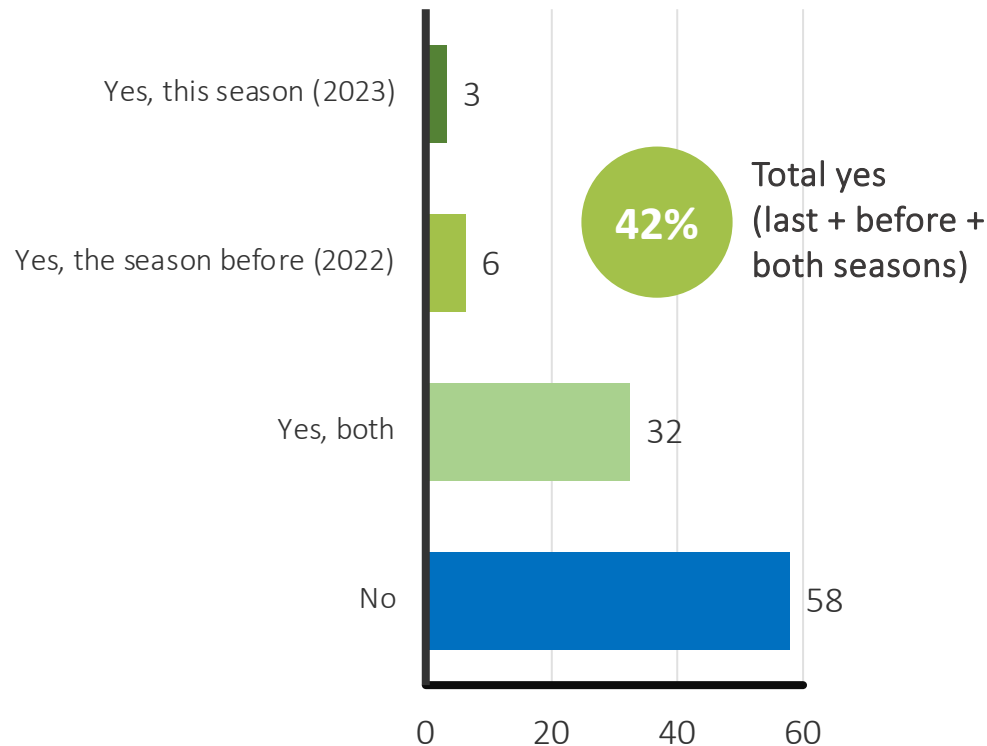
Those living in rural areas were also more likely to agree with all (34-78%) compared to those in metropolitan areas (26-61%). Māori respondents were more likely to agree that game bird hunting is:

- 'Is good to do with family and friends' (79%)
- 'A great way to help some families put food on their tables' (72%)
- 'An activity for all kinds of people' (62%)

Base: All respondents (n=2090)

Younger respondents are much more likely to have purchased a game bird hunting licence in last two seasons

Q. Within the last two seasons have you purchased any kind of Fish & Game NZ - game bird hunting licence for the following periods? (%)



Base: All respondents (n=2090)

Younger respondents were more likely to say they have purchased in the last two seasons:

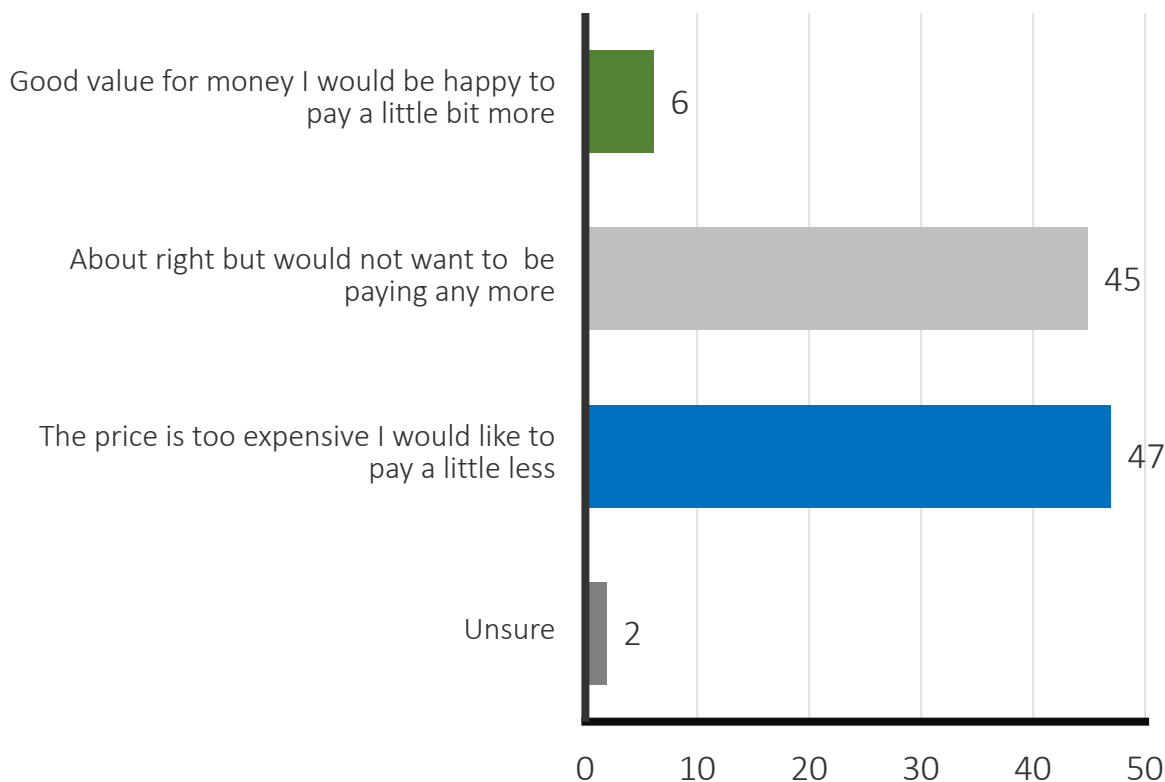
Under 35: 53%
35-49: 48%
50-64: 38%
65+: 28%

Men were also more likely to have purchased in the last two seasons (44%) compared to women (12%).

5.1 Game bird hunting – recent licence holder

Game bird hunters are mixed on wanting to pay more for a licence

Q. Thinking about the most recent game bird hunting licence that you purchased - which ONE of the following best describes your view of the price of that licence? (%)

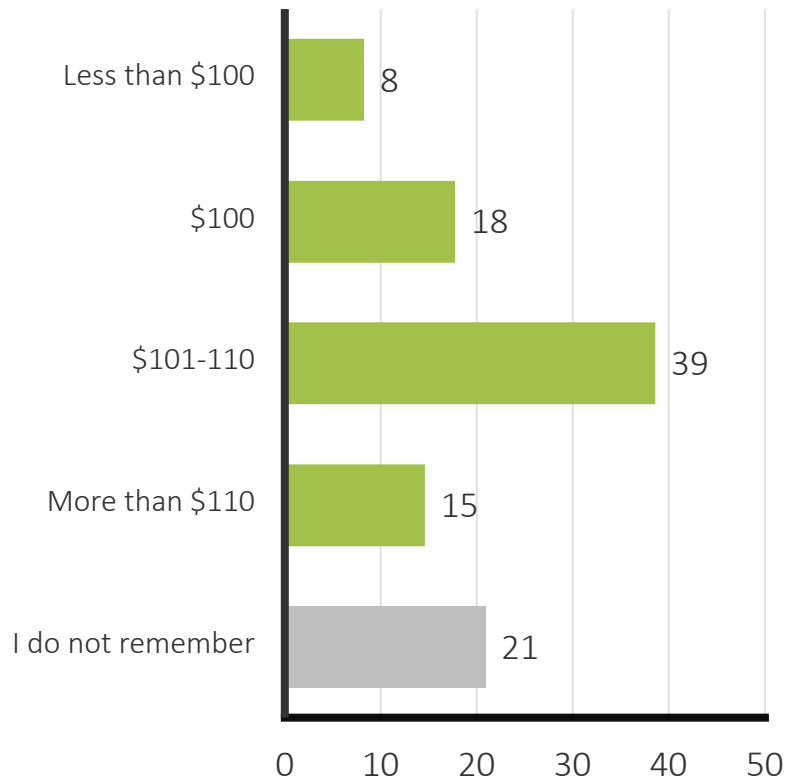


Otago residents were more likely to say the Licence was too expensive (64%).

Base: Those who have purchased a game bird hunting licence in the last two seasons (n=834)

The largest portion of game bird hunters recall paying between \$101 and \$110 for their licence (actual cost \$100)

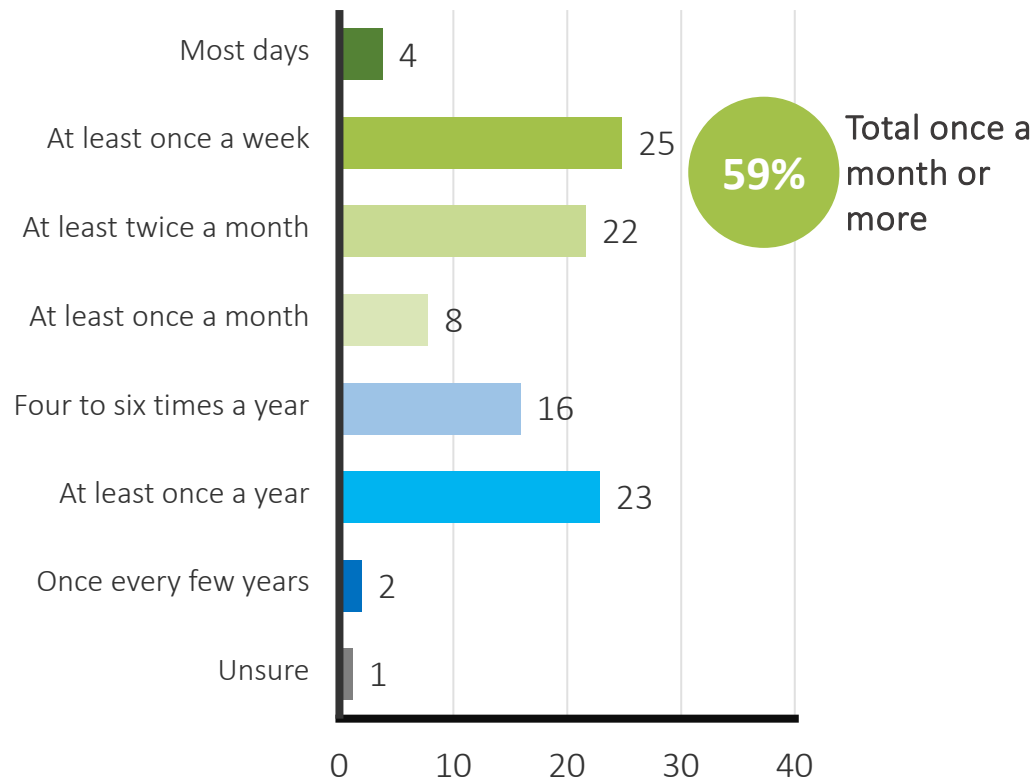
Q. How much do you recall paying for your game bird hunting licence? (%)



Base: Those who have purchased a game bird hunting licence in the last two seasons (n=834)

Well over half of game bird hunters do so this activity once a month or more, with a quarter game bird hunting at least once a week

Q. During the season which of the following best describes how often you usually go game bird hunting? (%)

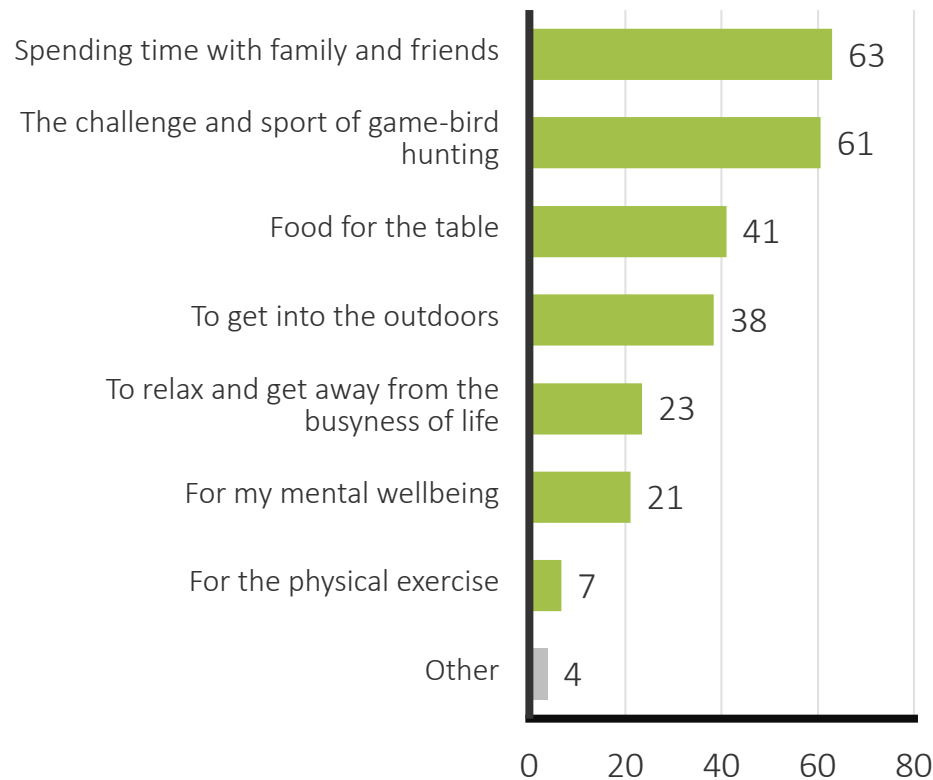


Those residing in Auckland/Waikato were more likely to say they usually go game bird hunting at least once a month or more (73%) compared to those in Otago (37%).

Base: Those who have purchased a game bird hunting licence in the last two seasons (n=834)

The main attractions of game bird hunting are, 'spending time with family and friends' and 'the challenge of the sport'

Q. What attracts you most to game bird hunting? (%)

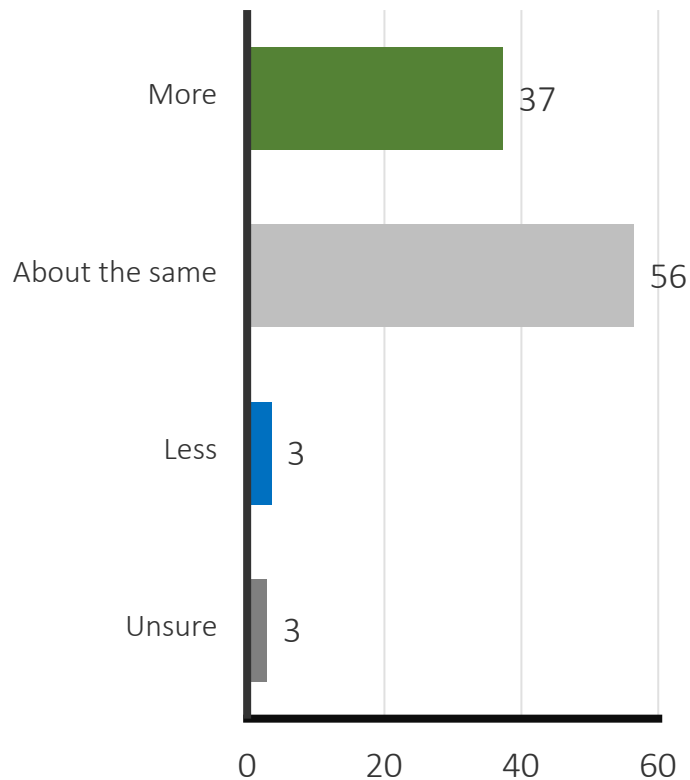


Fulltime workers were more likely to say spending time with family and friends (65%) and to relax and get away from the busyness of life (27%) attracts them to the most to game bird hunting.

Base: Those who have purchased a game bird hunting licence in the last two seasons (n=834)

Younger game bird hunters intend to do more of this hunting over the next few years than older game bird hunters

Q. Over the next few years do you intend to go game bird hunting more or less than you do now? (%)



Younger respondents were more likely to say they would do more game bird hunting:

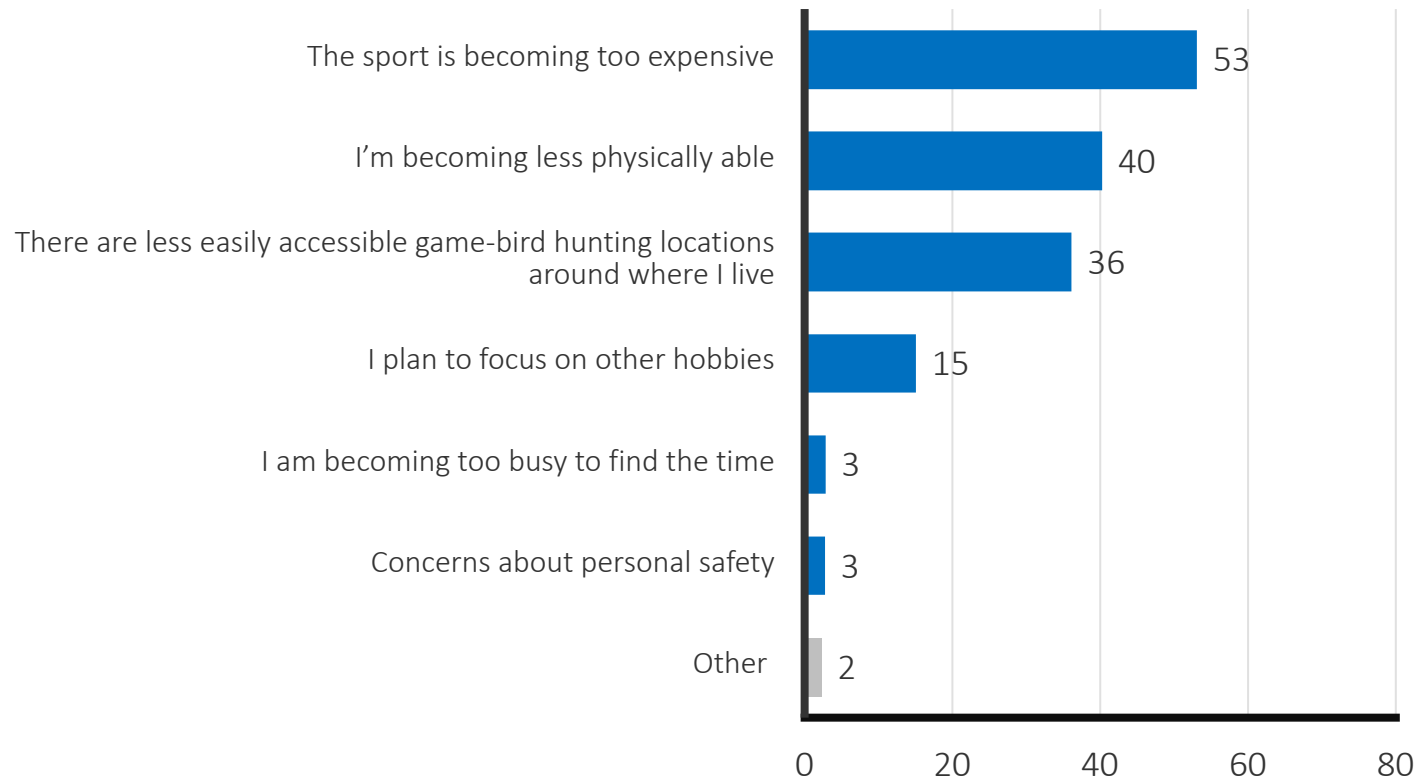
- Under 35: 50%
- 35-49: 40%
- 50-64: 33%
- 65+: 16%

Fulltime workers were also more likely to say they intend to do more (41%) compared to those not working (15%).

Base: Those who have purchased a game bird hunting licence in the last two seasons (n=834)

Main reason game bird hunters intend to do less of this in the future are 'the expense of the sport' and 'they're becoming less physically able'

Q. What are the main reasons why you intend to do less game bird hunting in the future? (%)



Base: Those who have purchased a game bird hunting licence in the last two seasons and intend to do less game bird hunting in the future (n=45)

5.2 Game Bird hunting— season before (2022)

Main reason game bird hunters missed buying a licence this season are 'being too busy' and 'less accessible locations to hunt'

Q. What are the main reasons for not purchasing a game bird hunting licence this season (2023)? (%)

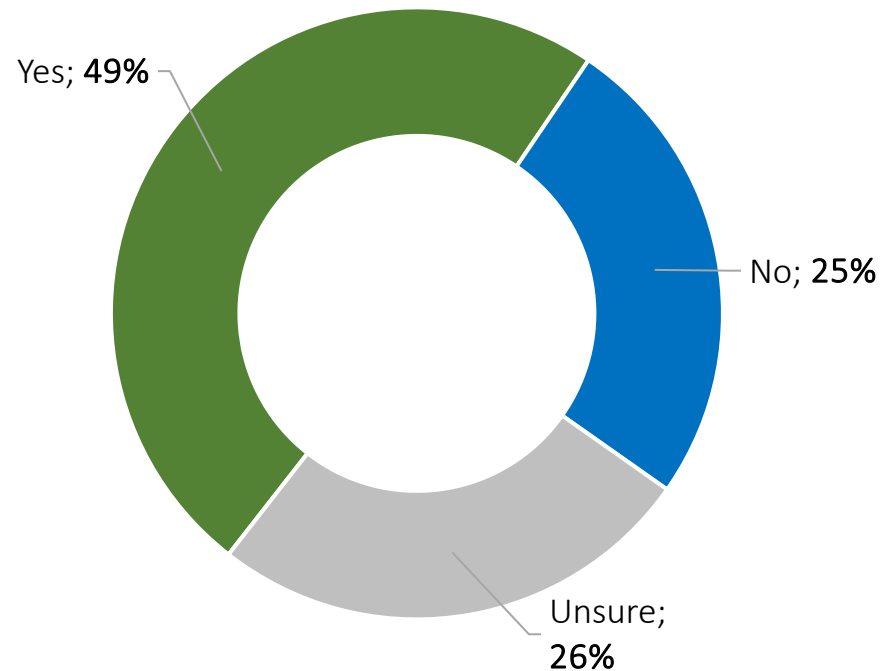


Those with dependent children were more likely to say they are becoming too busy to find the time (58%), compared to those without (21%).

Base: Those who have purchased a game bird hunting licence the season before but not in the last season (n=113)

Just under half of previous licence holders who missed purchasing a licence last season intend to purchase one again in the next 12 months

Q. Do you intend to purchase a game bird hunting licence (day or season) in the next 12 months? (%)



Base: Those who have purchased a game bird hunting licence the season before but not in the last season (n=113)

8. Conclusions and suggestions

Conclusions

- Overall, Licence holders know a reasonable amount about Fish & Game New Zealand and most think they are doing a good job. However older licence holders are more likely to know more about the organisation and think that they are doing a good job and this is in contrast to young licence holders.
- From the prompted list of nine Fish & Game activities It is encouraging that all of them were rated highly by Licence holders.
- However, licence holders identified ‘working to improve public access’ as the most important area for Fish & Game to focus on.
- Licence holders also rated the environmental activities of Fish & Game as highly important and these were ‘monitoring and researching for improved water quality and species health’, ‘protecting the natural values of lakes, rivers and wetlands’ and ‘establishing water conservation orders to legally preserve the natural values of lakes and rivers’.
- The aspects that all licence holders like most about **freshwater fishing** were that it was ‘good for improving mental and physical wellbeing’, ‘an important part of New Zealand’s outdoor heritage’ and ‘Is a good activity to share with family and friends’.
- The aspects that attracted anglers most to **freshwater fishing** included a chance ‘to get outdoors’ and ‘the challenge and sport of catching fish’.
- The aspects that all licence holders liked most about **game bird hunting** were that it was ‘an important part of New Zealand’s outdoor heritage’ and it was ‘a good activity to do together with family and friends’.
- The aspects that attracted hunters most to **game bird hunting** included ‘spending time with family and friends’ and ‘the challenge and sport of it’.
- Across the demographics of what all licence holders liked about fishing and game bird hunting there were some interesting demographic differences that could be useful when thinking about promoting these activities to specific groups – these are highlighted on the next page where we list some suggestions.
- Licence holders gave mixed responses about the price of licences – if anything anglers were slightly more disposed to pay more (but even in this case only a small minority sat in this camp).
- The majority of licence holders continue to prefer a hard copy of the Fish & Game magazine with a solid quarter preferring a digital version.

Suggestions to consider

1. **Maintain or ramp up public access work:** As there is very strong support for this main activity it is important to not only stay strongly focused in this area but to make sure as many licence holders as possible are aware of the extend of effort that Fish & Game puts into this.
2. **Prioritise water quality and environmental stewardship efforts:** Important to work alongside other partners to ensure Licence holders are aware of the environmental improvements Fish & Game helps to achieve in local fishing and hunting locations.
3. **Use softer benefits of fishing and hunting to further promote these activities:** This includes the positive impacts it has on both mental and physical well-being and how it can be an activity for family and friends to share together.
4. **Be cautious about any price increases for licences:** The research suggests there may be some room for targeted pricing, but views are less supportive in across-the-board increases.
5. **Keep the fish and game magazine as a hard copy:** There is some potential to investigate a digital version, as an option but it is too early to go completely online with this offering.
6. **Consider some targeting of messages:**
 - Young people are strongly drawn to freshwater fishing by ‘getting into the outdoors’
 - Māori more likely to agree that freshwater fishing and game bird hunting is a way to help families put food on the table.



9. Appendix

Sample description

The sample used for this survey was the 2021-22 fishing season and the 2022 game bird season. This way we were able to include in the survey a number of lapsed licence holders based on knowing an estimate 30% of anglers and hunters naturally lapse in purchasing a licence between seasons.

To ensure a clean and usable sample for the extraction of 15,000 records that were used for this survey the following criteria was followed:

- Retain highest value licence for each customer as some people purchase a day licence before season licence or multiple days. (i.e. one record per customer)
- Remove all records with no email address
- Remove all non-resident categories (but retain those resident categories with non-resident addresses)
- Remove all juniors and children
- Where one email address is used for multiple licence holders – review for most appropriate match and remove others.
- Where multiple emails are going to a fishing or hunting guide – remove all.





Primary
Purpose