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## ***2021 New and Reactivated Angler Survey***

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### **Report to Otago Fish & Game Council, September 22, 2021**

Otago Fish & Game staff led a national survey of new and reactivated anglers in July 2021.

The survey aimed to discover what motivated new anglers to buy a licence for the first time, and what prompted previous anglers who had given up the sport to come back. We also wanted to learn about their fishing experiences and find out what information they needed to help them continue in the sport. The survey collected data from more than 1500 licence holders. What we learned will be used to inform marketing efforts in the 2021-22 fishing season.

New anglers were defined as those who bought a freshwater sports fishing licence for the first time in 2020-21. Reactivated anglers were those who bought a fishing licence in 2020-21 having lapsed for the previous three seasons.

Questions were peer-reviewed by Fish & Game staff at Otago, Southland, and Eastern regions and the New Zealand Council before the survey was launched. Otago F&G obtained consent from the 12 regional managers to access licence holders from their areas.

A pilot survey was trialled in June 2021, and questions then fine-tuned. The main survey was conducted online from July 6-13, 2021. The survey was sent to 5682 licenceholders nationwide and received 1567 responses, a positive response rate of 27%.

The data was analysed by Southland Fish & Game field officer Cohen Stewart. The following content was authored primarily by Cohen.

#### **Method:**

The analysis:

- Broke down the success and satisfaction results by experience (new anglers vs long term lapsed anglers) (See Appendix, Table 10 and 11).
- Compared the motivators of lapsed vs new anglers (Table 12 and 13).
- Assessed differences in satisfaction and success by region (Table 15 and 16).
- Assessed differences in satisfaction for the differing licence types (Table 14).
- Compared success, satisfaction and licence buying intentions (Table 17).
- Tabulated the results (Table 1-9).

## Summary:

- Almost 30% of respondents found trout fishing difficult or very difficult. For new licence holders, approximately one third found fishing difficult, one third found fishing easy and one third found fishing neither easy nor difficult.
- When asked about the information Fish & Game could provide to help anglers with their fishing and encourage them to participate more often, anglers identified (1) ideas on where to go fishing, (2) general tips and tricks, and (3) specific instructional videos for the areas they fish.
- However, only 25% of respondents had watched instructional fishing videos produced by F&G. For Otago licence holders, only 20% had seen our instructional videos.
- Most anglers (72%) sourced their fishing information from friends/family. Where anglers sourced their information did not influence success rates.
- The main reasons new/long term lapsed anglers took up fishing this season was (1) they were encouraged by friends/family, (2) fishing was easily added to holiday plans, and (3) they 'just wanted to give it a go'.
- **The main reasons new anglers go fishing is to (1) enjoy nature/get outdoors, (2) escape everyday stress, (3) spend time with friends/family, and (4) the thrill of the catch.**
- New anglers fished with a fairly even split between friends, spouses, alone, and children.
- Eighty percent of surveyed anglers fished more than once this season. Just under half of the anglers surveyed fished more than four times.
- Almost 70% of new anglers were satisfied or very satisfied with their freshwater fishing experience. The main reason for dissatisfaction was lack of success.
- Thirty-eight percent of new anglers did not catch a fish.
- Just over one half of the new anglers surveyed said they would buy a licence next season whilst 42% of anglers were undecided on whether they will buy a licence.
- The more successful anglers were, the more likely they were to indicate that they would buy a licence next season.
- Thirty-nine percent of new anglers who did not catch a fish indicated they would buy a licence next season.
- Anglers who found fishing easy were more likely to indicate they would buy a licence next season while anglers who found fishing difficult were more likely to be undecided on whether they would buy a licence next season.
- Although anglers who found fishing easy were more likely to be satisfied or very satisfied, over 50% of anglers who found fishing difficult were still satisfied with their fishing experience.
- Satisfaction levels were fairly consistent by region. Sixty-five per cent of Otago anglers were satisfied. Forty per cent of anglers in Otago were unsuccessful. Anglers from Northland, CSI and North Canterbury were the most unsuccessful with ~50% of anglers failing to catch a fish.

**Conclusion:**

There was not much difference in success, satisfaction and motivations for new and lapsed anglers. However, reasons for participating differed substantially.

New anglers wanted to participate because they **'just wanted to give it a go'**.

Lapsed anglers participated because fishing could be easily added to their holiday plans, and they were encouraged by family/friends. Key motivators were to (1) enjoy nature/get outdoors; (2) escape everyday stress; and (3) spend time with friends/family. The thrill of the catch ranked only fourth.

Licence type purchased did not overly affect satisfaction. Significant numbers of day licence holders were satisfied/very satisfied with their angling experience last season. There is an opportunity to market full season or family licences to last season's day licence holders. New anglers have also told us the kind of information they want most: where to go fishing; general tips and tricks; and instructional videos for the areas they fish. This has important, practical applications.

More work is being done with the data to identify key marketing opportunities, develop targeted strategies, and deliver relevant, timely messaging and information as the fishing season progresses into summer. The clear objective is to attract new anglers and retain 2020/21 new or reactivated licence holders for the long-term benefit of freshwater sports fishing.

- **Otago Fish & Game communications officer Bruce Quirey  
and Southland Fish & Game field officer Cohen Stewart**

**Appendix:**

**Beginner angler results tables**

Table 1: Relationship between success and satisfaction. When interpreting the percentage column, 12.3% of anglers who did not catch a fish were very satisfied.

Level of success and satisfaction	Very satisfied	(%)	Satisfied	(%)	Neither satisfied nor dissatisfied	(%)	Dissatisfied	(%)	Very dissatisfied	(%)	Grand Total
No fish	64	12.3	184	35.3	189	36.3	63	12.1	21	4.0	521
One to five	162	27.7	300	51.4	95	16.3	25	4.3	2	0.3	584
Six to 10	50	38.8	61	47.3	12	9.3	3	2.3	3	2.3	129
11 to 20	36	50.0	29	40.3	4	5.6	2	2.8	1	1.4	72
More than 20	38	63.3	19	31.7	3	5.0		0.0		0.0	60
<b>Grand Total</b>	<b>350</b>		<b>593</b>		<b>303</b>		<b>93</b>		<b>27</b>		<b>1366</b>

Table 2: Relationship between an angler's satisfaction and their licence buying intentions next season. When interpreting the percentage column, 69.1 percent of very satisfied anglers intend to buy a licence next season.

Licence buying intention and satisfaction	Very satisfied	(%)	Satisfied	(%)	Neither satisfied nor dissatisfied	(%)	Dissatisfied	(%)	Very dissatisfied	(%)	Grand Total
Yes	239	69.1	323	54.7	119	40.3	25	8.0	2	27.5	708
No	4	1.2	15	2.5	23	7.8	14	60.0	15	15.4	71
Maybe	103	29.8	253	42.8	153	51.9	52	32.0	8	57.1	569
<b>Grand Total</b>	<b>346</b>		<b>591</b>		<b>295</b>		<b>91</b>		<b>25</b>		<b>1348</b>

Table 3: Relationship between success and whether a person intends to buy a licence next season. When interpreting the percentage column, 39.8% of anglers who did not catch a fish have indicated they will buy a licence next season.

Level of success and licence buying intention	Yes	(%)	No	(%)	Maybe	(%)	Grand Total
No fish	204	(39.8)	44	(8.6)	264	(51.6)	512
One to five	308	(53.3)	23	(4.0)	247	(42.7)	578
Six to 10	83	(66.4)	2	(1.6)	40	(32.0)	125
11 to 20	58	(81.7)	0	(0.0)	13	(18.3)	71
More than 20	55	(93.2)	2	(3.4)	2	(3.4)	59
<b>Grand Total</b>	<b>708</b>		<b>71</b>		<b>566</b>		<b>1345</b>

Table 4: Relationship between success and primary fishing information source. When interpreting the percentage column, of those anglers who caught no fish, 76.8% sourced most of their information from friends and family.

Level of success	Friends or family	(%)	Online videos	(%)	Web sites	(%)	Books	(%)	Brochures	(%)	Social media	(%)	Grand Total
No fish	388	76.8	53	10.5	43	8.5	13	2.6	4	0.8	4	0.8	505
One to five	423	78.2	55	10.2	38	7.0	15	2.8	2	0.4	8	1.5	541
Six to 10	97	78.9	15	12.2	6	4.9	2	1.6	1	0.8	2	1.6	123
11 to 20	47	69.1	12	17.6	6	8.8	1	1.5		0.0	2	2.9	68
More than 20	36	69.2	7	13.5	4	7.7	3	5.8	1	1.9	1	1.9	52
<b>Grand Total</b>	<b>991</b>		<b>142</b>		<b>97</b>		<b>34</b>		<b>8</b>		<b>17</b>		<b>1289</b>

Table 5: Relationship between difficulty and satisfaction. When interpreting the percentage column, of those anglers who were very dissatisfied, 52.9% found angling very difficult.

Relationship between difficulty and satisfaction	Very easy	(%)	Easy	(%)	Neither easy nor difficult	(%)	Difficult	(%)	Very difficult	(%)	Grand Total
Very dissatisfied	0	0	0	0	1	5.9	7	41.2	9	52.9	17
Dissatisfied	3	6.1	4	8.2	14	28.6	22	44.9	6	12.2	49
Neither satisfied nor dissatisfied	4	2.4	25	15.0	87	52.1	42	25.1	9	5.4	167
Satisfied	24	8.0	86	28.8	109	36.5	74	24.7	6	2.0	299
Very satisfied	44	24.3	49	27.1	59	32.6	29	16.0	0	0.0	181
<b>Grand Total</b>	<b>75</b>		<b>164</b>		<b>270</b>		<b>174</b>		<b>30</b>		

Table 6: Relationship between perception of difficulty and future licence buying. When interpreting the percentage column, of those anglers who intend to buy a licence next season, 14.3% found fishing very easy.

Relationship between perception of difficulty and future licence buying	Very easy	(%)	Easy	(%)	Neither easy nor difficult	(%)	Difficult	(%)	Very difficult	(%)	Grand total
Yes	51	14.3	98	27.5	123	34.6	80	22.5	4	1.1	356
No	1	2.4	6	14.3	14	33.3	13	31.0	8	19.0	42
Maybe	21	7.7	56	20.6	105	38.6	73	26.8	17	6.3	272
<b>Grand Total</b>	<b>73</b>		<b>160</b>		<b>242</b>		<b>166</b>		<b>29</b>		

Table 7: How easy was fishing for first time licence holders?

Very easy	Easy	Neither easy nor difficult	Difficult	Very difficult	Grand Total
79	180	295	189	37	780
10.1%	23.1%	37.8%	24.2%	4.7%	

Table 8: F&G video viewing by region.

Video viewing	SO U	OT A	A/W	CSI	EST	HB	N/M	NC	NO R	TAR	WE L	WC	Grand Total
Yes	20	54	49	43	77	18	24	36	1	7	36	14	379
No	78	213	97	122	196	56	76	101	8	17	54	29	1047
% viewed	20.4	20.2	33.6	26.1	28.2	24.3	24.0	26.3	11.1	29.2	40.0	32.6	
<b>Grand Total</b>	<b>98</b>	<b>267</b>	<b>146</b>	<b>165</b>	<b>273</b>	<b>74</b>	<b>100</b>	<b>137</b>	<b>9</b>	<b>24</b>	<b>90</b>	<b>43</b>	<b>1426</b>

Table 9: Relationship between participation effort, satisfaction and success. When interpreting, there were 165 anglers who fished for one day and didn't catch any fish. Of those 165 anglers 11/165 were very dissatisfied.

Success, satisfaction and participation effort	None - I didn't fish at all.	One day	Two to three days	Four to 10 days	More than 10 days	Grand Total
<b>No fish caught</b>	<b>32</b>	<b>165</b>	<b>174</b>	<b>124</b>	<b>26</b>	<b>521</b>
Very dissatisfied	4	11	3	3		21
Dissatisfied	3	18	21	19	2	63
Neither satisfied nor dissatisfied	21	60	55	43	10	189
Satisfied	2	50	75	48	9	184
Very satisfied	2	26	20	11	5	64
<b>One to five</b>		<b>108</b>	<b>197</b>	<b>201</b>	<b>78</b>	<b>584</b>
Very dissatisfied				1	1	2
Dissatisfied			10	9	6	25
Neither satisfied nor dissatisfied		12	33	37	13	95
Satisfied		52	97	108	43	300
Very satisfied		44	57	46	15	162
<b>Six to 10</b>		<b>9</b>	<b>25</b>	<b>45</b>	<b>50</b>	<b>129</b>
Very dissatisfied					3	3
Dissatisfied			1	1	1	3
Neither satisfied nor dissatisfied			1	4	7	12
Satisfied		6	11	27	17	61
Very satisfied		3	12	13	22	50
<b>11 to 20</b>		<b>4</b>	<b>5</b>	<b>21</b>	<b>42</b>	<b>72</b>
Very dissatisfied				1		1
Dissatisfied			1	1		2
Neither satisfied nor dissatisfied				2	2	4
Satisfied		3	2	7	17	29
Very satisfied		1	2	10	23	36
<b>More than 20</b>		<b>2</b>	<b>4</b>	<b>8</b>	<b>46</b>	<b>60</b>
Neither satisfied nor dissatisfied			1		2	3
Satisfied			1	4	14	19
Very satisfied		2	2	4	30	38
<b>Grand Total</b>	<b>32</b>	<b>288</b>	<b>405</b>	<b>399</b>	<b>242</b>	<b>1366</b>



Table 10: Relationship between experience and success. When interpreting the percentage column, 37.5% of long term lapsed anglers did not catch a fish.

<b>Success and experience</b>	<b>Long term lapsed</b>	<b>(%)</b>	<b>New anglers</b>	<b>(%)</b>	<b>Grand Total</b>
No fish caught	256	37.5	265	38.8	521
One to five	297	43.5	287	42.0	584
Six to 10	66	9.7	63	9.2	129
11 to 20	34	5.0	38	5.6	72
More than 20	30	4.4	30	4.4	60
<b>Grand Total</b>	<b>683</b>		<b>683</b>		<b>1366</b>

Table 11: Relationship between experience and satisfaction. When interpreting the percentage column, 1.7% of long term lapsed anglers were very dissatisfied.

<b>Experience and satisfaction</b>	<b>Long term lapsed</b>	<b>(%)</b>	<b>New anglers</b>	<b>(%)</b>	<b>Grand Total</b>
Very dissatisfied	12	1.7	17	2.4	29
Dissatisfied	50	7.0	49	6.9	99
Neither satisfied nor dissatisfied	145	20.4	168	23.5	313
Satisfied	322	45.2	299	41.9	621
Very satisfied	183	25.7	181	25.4	364
<b>Grand Total</b>	<b>712</b>		<b>714</b>		<b>1426</b>

Table 12: Relationship between experience and motivation. Importance ranking ranks motivators by total number of anglers in a group that indicated motivators were important or very important.

<u>New anglers motivation</u>	Catching big fish	Challenging myself	Enjoying nature/getting outdoors	Escaping from stress	Enjoying time with friends/family	Harvesting fish for the table	Experiencing something new	Thrill of the catch
Not very important	0	0	0	0	0	0	0	0
Somewhat important	132	113	28	48	32	84	42	54
Neutral	253	178	30	97	84	191	158	98
Important	120	267	267	277	263	176	352	335
Very important	37	61	378	263	293	56	116	194
Importance ranking	8	6	1	3	2	7	5	4
<u>Lapsed anglers motivation</u>								
Not very important	159	79	6	17	30	192	32	25
Somewhat important	125	104	28	45	31	81	41	52
Neutral	235	166	27	92	78	178	149	93
Important	114	256	249	260	246	162	334	315
Very important	35	60	361	251	280	56	110	185
Importance ranking	8	6	1	3	2	7	5	4

Table 13: Relationship between experience a reason for participation. Ranking of top three reasons for participation in brackets.

Participation and experience	Encouraged by friends/family	Easily added to holiday plans	Learned of opportunities	Moved to an area with good fishing opportunities	Few overseas anglers	Take the kids	Watched a video on fishing	More time	Just wanted to give it a go	Attend a F&G event	Other
Long term lapsers	220(2)	227(1)	40	101	45	151	12	187(3)	95	10	91
New anglers	297(2)	200(3)	94	137	25	107	46	99	316 (1)	6	57

Table 14: Relationship between satisfaction and licence type. Percent anglers satisfied re those that were satisfied or very satisfied.

Licence type and satisfaction	Adult day	Adult WS	Family	Local Area	Winter	Long break	Short break	Grand Total
Very dissatisfied	9	9	4	3	3		1	29
Dissatisfied	21	38	11	12	7	2	8	99
Neither satisfied nor dissatisfied	88	108	44	25	14	5	29	313
Satisfied	204	183	89	42	43	3	57	621
Very satisfied	144	92	49	19	23		37	364
<b>Grand Total</b>	<b>466</b>	<b>430</b>	<b>197</b>	<b>101</b>	<b>90</b>	<b>10</b>	<b>132</b>	<b>1426</b>
<b>% anglers satisfied</b>	<b>74.7</b>	<b>64.0</b>	<b>70.1</b>	<b>60.4</b>	<b>73.3</b>	<b>30.0</b>	<b>71.2</b>	

Table 15: Relationship between region and satisfaction. Percent Dissatisfied = dissatisfied + very dissatisfied.  
Percent Satisfied = satisfied + very satisfied.

Region and satisfaction	A/W	CS	ES	HB	N/M	NC	NOR	OTA	SOU	TAR	WEL	WC	Grand Total
Very dissatisfied	6.0	4.0	3.0	2.0	2.0	4.0		5.0	3.0				29
Dissatisfied	11	12	5	3	7	17	2	21	11		7	3	99
Neither satisfied nor dissatisfied	30	51	47	16	27	31	2	67	14	8	13	7	313
Satisfied	64	63	125	26	42	63	2	115	43	13	44	21	621
Very satisfied	35	35	93	27	22	22	3	59	27	3	26	12	364
<b>Grand Total</b>	<b>146</b>	<b>165</b>	<b>273</b>	<b>74</b>	<b>100</b>	<b>137</b>	<b>9</b>	<b>267</b>	<b>98</b>	<b>24</b>	<b>90</b>	<b>43</b>	<b>1426</b>
<b>% Dissatisfied</b>	11.6	9.7	2.9	6.8	9.0	15.3	22.2	9.7	14.3	0.0	11.6	9.7	
<b>% Satisfied</b>	67.8	59.4	79.9	71.6	64.0	62.0	55.6	65.2	71.4	66.7	67.8	59.4	

Table 16: Relationship between success and region.

Row Labels	A/W	CSI	EST	HB	N/M	NC	NO	OTA	SOU	TAR	WEL	WC	Grand Total
No fish caught	46	82	76	20	44	66	5	104	29	10	23	16	521
One to five	58	61	119	38	39	45	2	101	52	9	42	18	584
Six to 10	15	5	28	5	9	12	1	28	11	1	11	3	129
11 to 20	9	5	19	4	3	6		16	3	2	4	1	72
More than 20	10	4	21	4	2			9		1	6	3	60
<b>Grand Total</b>	<b>138</b>	<b>157</b>	<b>263</b>	<b>71</b>	<b>97</b>	<b>129</b>	<b>8</b>	<b>258</b>	<b>95</b>	<b>23</b>	<b>86</b>	<b>41</b>	<b>1366</b>
<b>% unsuccessful</b>	33.3	52.2	28.9	28.2	45.4	51.2	62.5	40.3	30.5	43.5	26.7	39.0	

Table 17: Relationship between success, satisfaction and licence buying intention. When interpreting this table, 21 anglers were very dissatisfied and caught no fish. Only one of these anglers has indicated they will buy a licence next season. In contrast, 64 anglers were very satisfied despite catching no fish and of these anglers, 35 have said they intend to buy a licence next year.

Success, satisfaction, licence buying	No fish caught	One to five	Six to 10	11 to 20	More than 20	Grand Total
<b>Very dissatisfied</b>	<b>21</b>	<b>2</b>	<b>3</b>	<b>1</b>		<b>27</b>
Yes	1			1		2
No	13	2				15
Maybe	6		2			8
Comment	1		1			2
<b>Dissatisfied</b>	<b>63</b>	<b>25</b>	<b>3</b>	<b>2</b>		<b>93</b>
Yes	17	7	1			25
No	9	4	1			14
Maybe	35	14	1	2		52
Comment	2					2
<b>Neither satisfied nor dissatisfied</b>	<b>189</b>	<b>95</b>	<b>12</b>	<b>4</b>	<b>3</b>	<b>303</b>
Yes	63	45	8	1	2	119
No	14	7	1		1	23
Maybe	108	39	3	3		153
Comment	4	4				8
<b>Satisfied</b>	<b>184</b>	<b>300</b>	<b>61</b>	<b>29</b>	<b>19</b>	<b>593</b>
Yes	88	155	37	24	19	323
No	8	7				15
Maybe	87	138	21	5		251
Comment	1		3			4
<b>Very satisfied</b>	<b>64</b>	<b>162</b>	<b>50</b>	<b>36</b>	<b>38</b>	<b>350</b>
Yes	35	101	37	32	34	239
No		3			1	4
Maybe	28	56	13	3	2	102
Comment	1	2		1	1	5
<b>Grand Total</b>	<b>521</b>	<b>584</b>	<b>129</b>	<b>72</b>	<b>60</b>	<b>1366</b>