



Priorities, Value & Performance 2025



Vision Thinking



Fish & Game New Zealand Priorities, Value, and Performance 2025

July 2025

A report prepared for the New Zealand Fish and Game Council
by Dr Humphrey Walker PhD



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Acknowledgements

Fish & Game New Zealand would like to acknowledge all those fishing and game bird licence-holders that gave their time, knowledge, and opinions. By doing so they have helped the organisation work towards its vision of a nation ‘where freshwater species flourish, where hunting and fishing traditions thrive, and all Kiwis enjoy access to sustainable wild fish and game resources.’

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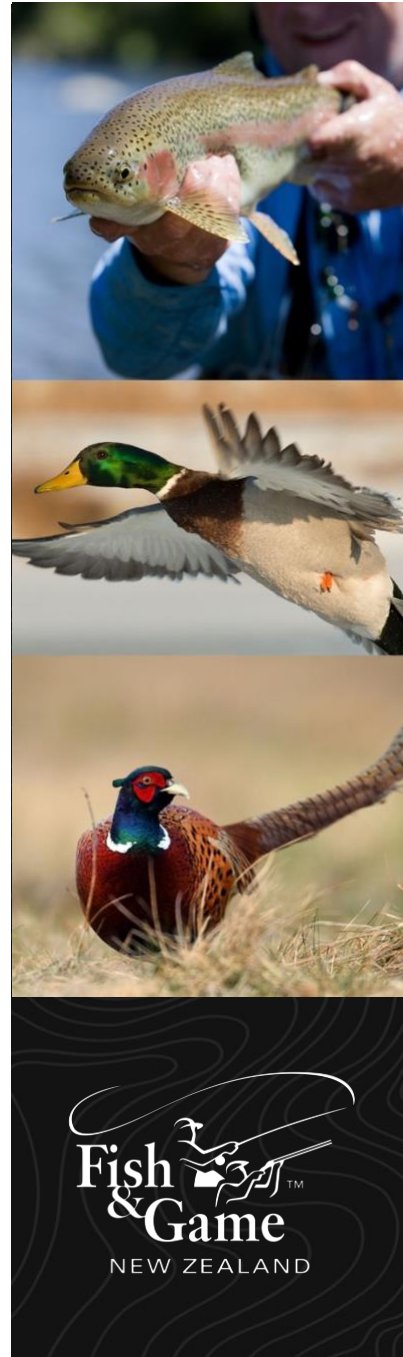
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1 Structure and contents of this report

In pursuit of Fish & Game's strategic objective to attract and retain licence-holders, this report details a May-June 2025 survey of past and present purchasers of fish and game licences.

This year the survey used a simple rank-order exercise to prioritise attributes of Fish & Game's operations according to the importance licence-holders placed upon them. The top five attributes from the comprehensive 2024 study were used except for 'Water Conservation Orders', which was deemed part of 'Advocacy' and removed to avoid duplication. This year also saw the addition of a section with a focus on access. The access section was intended to provide a snap-shot of licence-holders 'access' and provide a base to inform a focussed study on access, if desired. In addition, the survey quantifies customer's perceptions of fishing and game bird licence values and of Fish & Game's performance. Questions included an invitation to comment on possible improvements in licence value and on reasons for the performance rating given. In total, over 1,300 comments were organised and analysed according to their themes.

The report is structured to present key points from the research in a readable format. The executive summary is followed by an introduction, method and methodology, results, and conclusions. The final section contains some points for consideration.



2 Executive summary

This report is the third annual study towards the strategic goal of attracting and retaining licence-holders. A survey of past and present licence-holders was conducted from the 23rd May to the 22nd June 2025. The aim was to quantify and characterise perceptions of licence value and service delivery. A ranking task was used to rank licence-holder priorities for service delivery. This was a simplified task containing the top-five service attributes from the more complex 2024 MaxDiff choice experiment, which contained sixteen service attributes. *Conservation Orders*, which ranked second in 2024, was deemed to be part of the *Advocacy* service attribute and, to avoid duplication, was removed as part of the iterative reflection process. Simplifying the ranking task allowed space for a section focussed on licence-holder access, which was the top-ranking service attribute from 2024. The survey used Likert-type rating scales to quantify perceptions, including those of licence value and F&G's performance. In addition, an analysis of licence holder comments was used to capture insights into access requirements for those with poor mobility or disability, ways to improve licence value, and the motivations behind performance ratings.

Most (65.8%) respondents accessed hunting or fishing via public access points (other than Department of Conservation land) and about half that number (33.2%) used F&G negotiated access across private land. Public access points (other than Department of Conservation land) were used by 80% of solely Fishing-oriented respondents and just 36.5% of solely Game-oriented respondents. Conversely, 52.4% of Game-oriented respondents made access by negotiating with private landowners compared to just 13.6% of solely Fishing-oriented. There was variation in the proportion of respondents using public access across F&G regions see [Figure 15, p. 17](#).

The most utilised F&G access tool was signage 47.4%. Printed brochures (29.3%) and their downloadable equivalent (29.2%) were used equally and personal contact with the local F&G team (8.2%) was the least utilised access tool. Approximately a quarter used the interactive maps on the F&G website and 28.8% did not use F&G access tools at all.

Overall, 19.2% of respondents had experienced blocked access to hunting and/or fishing locations in the past 12-months. There was variation in the experience of blocked access across F&G regions, see [Figure 17, p. 19](#). Hawke's Bay (27.9%) had the highest rate of those experiencing blocked access, possibly as a residual effect of the 2023 Cyclone Gabrielle, and Auckland/Waikato (13.3%) had the lowest.

When weighted for age, one-in-fifteen (6.5%) of respondents had their access impacted by limited mobility or disability. Of those, 84 (75%) chose to leave a comment telling F&G how this had impacted them and what F&G could do to improve their access. Vehicle access (23.8% of comments) or flat access (17.9%) featured as a requirement. Locked gates were a barrier cited in 13.3% of comments and 4.8% needed assistance getting over fences. Twenty percent of comments felt there was nothing F&G could do, with 16.7% citing age-related frailty. Tradition played more of a part in choosing access locations for Game-oriented respondents.

Tradition played more of a part in access location choice for hunters compared to fishers. Of those solely Fishing-oriented, 42.4% reported tradition was somewhat to extremely important when choosing access locations compared to 62.9% for those solely Game-oriented. Forty-one percent of respondents felt that F&G does a good job of advocating for access on their behalf, however, there were very high rates of uncertainty (22.3%). The uncertainty rate was consistent across hunters and fishers suggesting either more action, more communication, or both is required. The median performance rating for advocating for access was 4 out of 5 from those that were sure. There was variation in ratings across F&G regions, see [Figure 21, p. 22](#). The highest proportion of negative ratings were in Southland, while the West Coast had no negative ratings.

Most (65.3%) of those purchasing a 2024/25 Fishing licence had purchased at least four out of the last five years and the most loyal purchasers were the 'Loyal Seniors'. The highest rate of mixed licence tenure was in those under 35 years old. Most purchasers (55.1%, down 8 percentage points from 2024) rated their fishing licence value positively¹ at ≥ 6 out of 9. Neutral (5 out of 9) was 18.1%, and 26.8% (up 7.2 percentage points from 2024) rated the value poorly at ≤ 4 . The median rating was 6 out of 9, down from 7/9 last year. The highest proportion of 'Excellent value' ratings by licence type was among the Whole Season Loyal Seniors. Sixteen percent of those that purchased a 2024/25 fishing licence purchased a licence type different to their previous purchase. A quarter of those did so because they intended to fish more often and 16.6% changed looking for a cheaper option. Of those that did not purchase in 2024/25, 37.2% had become too busy (up 12.2 percentage points from 2024), 23.1% chose to focus on other hobbies, and 15.4% found it too expensive. Comments on how to improve licence value were offered by 310 respondents and, as expected, the largest single proportion (48.1%) suggested lowering price, 20% focussed on increasing stocks of fish, and only 1.6% wanted an increased bag or season.

Of those that purchased a 2025 Game Bird licence (40% of the sample), most (84.7%) had purchased at least four out of the last five years. A minority (46%) rated value for money as ≥ 6 (down 6 percentage points from 2024). The median rating for game licences was 5 out of 9, down from 6/9 last year. Poor value ratings (1-4) were given by 36% of respondents (up 7.5 percentage points from 2024), and those giving *Very poor* value ratings (1) doubled from last year to 14%. Overall, game licences were seen as being lower value for money than fishing licences (unchanged from 2024). Only 8.7% purchased a licence that was different to their last purchase and another 8% were unsure if it was different. Twenty-one percent changed because they intended to hunt more, 13.2% hunt less, and 10.5% were looking for a cheaper option. Expense accounted for 14.9% of those that did not purchase (unchanged from 2024), 18.1% had become too busy (up 5.6 percentage points on last year), and 13.8% chose to focus on other hobbies. Access was an issue for 11.7% of those that did not purchase. Comments on how to improve licence value were offered by 186 respondents and, as expected, the largest single proportion (45.2%) suggested a drop in price and 15.6% called for less restrictive

¹ The rating scale, adopted from that of the Otago F&G Region, ranged from 1(Very poor value) to 9(Excellent Value).

rules, bag limit, or season. Comments from those paying the same licence price for a one month season were common.

A rating scale was used to capture perceptions of F&G's performance and respondents were invited to comment on their rating choice. An 'unsure' option was also included. Overall, most licence holders (53.9%) gave F&G a good performance rating (down 6.7 percentage points from 2024, equating to an 11% drop in positive ratings) with 10.5% giving a bad rating (up 3.4 percentage points from 2024). A further 21.8% gave a neutral rating (up 4.9 percentage points from 2024), and 13.8% were unsure. Uncertainty was highest in the 24-35yr age group (an age group higher than 2024).

In all, 808 respondents chose to leave a comment, and these were analysed according to themes. Comments often had more than one theme; therefore, percentages sum to more than 100. Those happy with F&G felt it provided the best vehicle for their political and legal representation (31%), appreciated F&G efforts to communicate (23.9%), and efforts to promote stocks of quarry (15.6%). Licence monitoring and enforcement (13.3%) was seen as an essential element of fairness and natural justice. Good raters were grateful of access points (22.9%) and efforts to gain more access, and of F&G's involvement in environmental protection (14.8%), especially water quality. Typical good comments were:

"Access to waterways, ecological work on rivers, trout counts, political pressure regarding water quality."

"Having a national body promote and represent the interests of my passion for fishing and fishing areas is important in ensuring access and enjoyment are maintained."

"Enforcing the rules, providing access, keeping angler etc updated on relevant info etc."

Poor ratings were mainly associated with perceptions of insufficient efforts to promote stocks of fish and game (20.7%), perceived conflict with farmers (17%) (up three-fold on 2024), negative views of leadership (14.8%), high licence price (13.3%), mismanagement of funds (14.1%) and disagreement with policy and representations (13.3%) (up almost three-fold on 2024). Typical comments from 'Bad' raters were:

"Never see them doing anything in the areas I frequent, or any form of improvement. Water quality and fishing opportunities have only decreased in the past 10 years. seems like you do nothing constructive so maybe do more comms and surveys to ask license holders their priorities"

"Instead of fighting against the very people (farmers) who support your organization and blaming them for being the problem work with them on solutions instead of against them."

"Using hunters money to subsidize fishing. Spending our money on legal cases and not releasing enough pheasants and ducks."

3 Introduction

The prospect of a forthcoming stand-alone Fish & Game Act is a seminal moment for Fish & Game (F&G) (NZ Govt, 2025). Facing falling participation, an ageing licence-holder base, cultural pressure on the social licence to hunt and fish, competition for the recreational use of public spaces, and underrepresentation in key demographics, F&G is an organisation under pressure to evolve. The current organisational strategy is founded on a vision for its future, a defined purpose, and a set of core values (Fish & Game, 2022). Five objectives underpin efforts to meet the strategic vision. The objective relevant to this study is the '*attraction and retention of licence-holders*.' Providing the organisation with sustainable revenue through growth and retention of licence-holders has been identified as an essential goal if other programmes are to be funded.

3.1 Purpose

This study was commissioned by the New Zealand Fish & Game Council (NZFGC) as part of their attitudinal research towards achieving the attraction and retention of licence-holders.

3.2 Project definition

3.2.1 Aim

To quantify and characterise perceptions of licence value and service delivery.

3.2.2 Objectives

To address the aim of the research, three main objectives have been identified:

- i. To rank licence-holder prioritisation of five selected services delivered by Fish & Game.
- ii. To quantify selected elements of licence-holder's access to hunting and fishing.
- iii. To quantify and characterise perceptions of fishing and game bird hunting licence value and Fish & Games performance.

3.3 Approach

The research surveyed licence-holders nationally. A mixture of quantitative and qualitative methods was applied. These included a simple ranking task, ordinal rating scales, and open-ended responses. The data was analysed using SPSS V31 and comments were coded using a tagging function within the survey delivery platform.

3.4 Contribution

This research will help the NZFGC evaluate the impact of their governance from the perspective of anglers and game bird hunters. In particular, the information will provide a lens with which the NZFGC may focus efforts to attract and retain licence-holders, and report perceptions of value and performance to the Minister.

4 Method and methodology

4.1 Questionnaire development

The survey was based on that deployed in 2024 which in turn was grounded on the 2023 work by Primary Purpose. To contain cognitive load and provide space for additional questions on access, this year the survey employed a simple ranking task to measure respondent's service priorities. The ranking task used the top-five service attributes from the more complex 2024 MaxDiff choice experiment, which contained sixteen service attributes. *Conservation Orders*, which ranked second in 2024, was deemed to be part of the *Advocacy* service attribute and, to avoid duplication, was removed as part of the iterative reflection process. In addition, the survey applied Likert-type rating scales and open-ended responses.

4.1.1 Ranking importance

Respondents were faced with five randomised service delivery items which they were asked to place in order of importance to them from highest to lowest. The service items used are shown in [Table 1, p.13](#). The final rank order is obtained by applying positional weighted mean scores as shown in Equation below.

$$\bar{x} = \frac{(w_1 x_1 + w_2 x_2 + \dots + w_n x_n)}{n_T}$$

Where

$\bar{x}$ is the positional weighted mean score

x_i are the data points

w_i are their corresponding weights

n_T is the total response count

4.1.2 Rating scales and nominal responses

A 5-point rating scale for performance was adopted in 2024 from Primary Purpose (2023) to enable a comparison of results, this scale was continued in 2025. A 9-point scale for licence value was adopted in 2024 at the request of the Otago Fish and Game Council to allow comparison with their independent yearly studies. This was also continued in 2025. Five-point Likert-type scales were otherwise applied along with nominal multichoice questions. Answer choices for nominal questions were randomised to avoid order bias.

4.1.3 Thematic analysis of comments

Respondent's comments relating to their F&G performance rating were coded using a tagging function within the survey delivery platform. Each comment was coded for one or more sub-themes, and these were grouped into a smaller number of themes. The qualitative analysis was largely deductive using themes from 2024 where practicable. This year, there appeared to be more 'listing' of service attributes within comments compared to 2024. This was likely due to priming respondents with information from the preceding section on Access. This behaviour was most evident within the *Communication* theme. While the frequency of comments holding each sub-theme are

unaffected, if a simple additive function is applied, comments containing multiple sub-themes within the same theme will inflate the apparent frequency of that theme. This effect has been corrected in the results which has required a slight modification in graphical representation from 2024.

4.2 Delivery and sampling

Like 2024, the sample was comprised of a random extraction of 11,500 current (2024/25) and 4,500 lapsed licence-holders from the previous year. This construct captured views of the most current licence-holders while also representing the views of lapsed licence-holders, based on the best-known estimate of a 30% lapse rate in licence purchase.

The sample was further stratified to represent age, gender, region, and the fishing /game bird licence sales split. Following Primary Purpose (2023), where more than one licence was held, the highest value licence was retained ensuring one record per licence holder, all non-resident-licence purchasers were removed, and where one email address was used for multiple licence-holders they were reviewed for the most appropriate match and the others removed. Where multiple emails were going to a fishing and hunting guide all were removed. In a change from 2024, the minimum age for participation was reduced from 18 to 16 years old. Only those consenting to being contacted by Fish & Game were eligible for selection.

The survey was fielded from 23rd May to 22nd June 2025, and respondents were incentivised with the option to enter a draw for a \$250 Hunting & Fishing store voucher. Delivery was early in the game season, however, approximately 90% of all game bird licence sales occur prior to opening weekend. Invitations containing a survey link were emailed directly to the sample and weekly reminder emails were sent targeting those who had not replied.

5 Results

This section details the survey results. First it covers the demographic profile of the sample [section 5.1](#), this is followed by the ranked priorities for service delivery [section 5.2](#), insights into licence-holder access [section 5.3](#), perceptions of licence value-for-money [section 5.4](#), and perceptions of F&G's performance in [section 5.5](#).

In total, 1506 respondents started the survey with 1370 completing all questions, yielding a 91% completion rate. This was a stark contrast to the software-estimated completion rate of 69% and lends confidence that the balance of question type and number is tolerable and that additional questions may be possible. Based on the completed responses, the sample margin of error at the 95% confidence level for a 50% figure is $\pm 2.5\%$. Rake weighting for age and F&G region was applied where appropriate. Weighting for gender was not required.

5.1 Demographics: General and by usual licence type purchased

To provide deeper insight, demographic reporting also includes a breakdown based on those who have purchased either just a game licence at least once in the past 5-years, just a fishing licence, or both licence types. The total sample breakdown by usual licence type purchased is shown in [Figure 1](#). It shows more than half of the sample that usually purchase a game licence also usually purchase a fishing licence. This rate of dual purchase is higher than the background rate for F&G and suggests an avidity bias² in the sample. There has been an increase in the proportion of respondents with a dual licence purchasing history compared to last year. This may reflect the question changing from an emphasis on 'usual' purchasing behaviour in 2024 to a specified 5-year time frame in 2025.

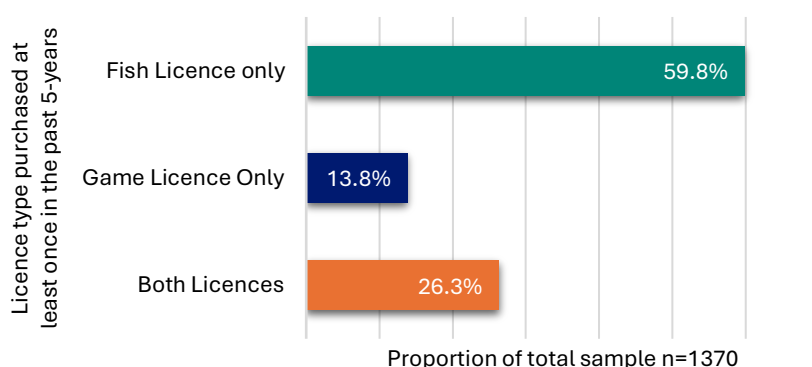


Figure 1 Sample Breakdown by the Type of Licence Usually Purchased

² An avidity bias is a type of self-selection bias, often occurring in recreational samples, where the most avid (keen) participants are more likely to respond to a survey.

5.1.1 Age

The age profile of the sample reflects the older age skew of its customer base, however, there was still an over-representation in the 65+ age bracket, and this had increased slightly compared to 2024.

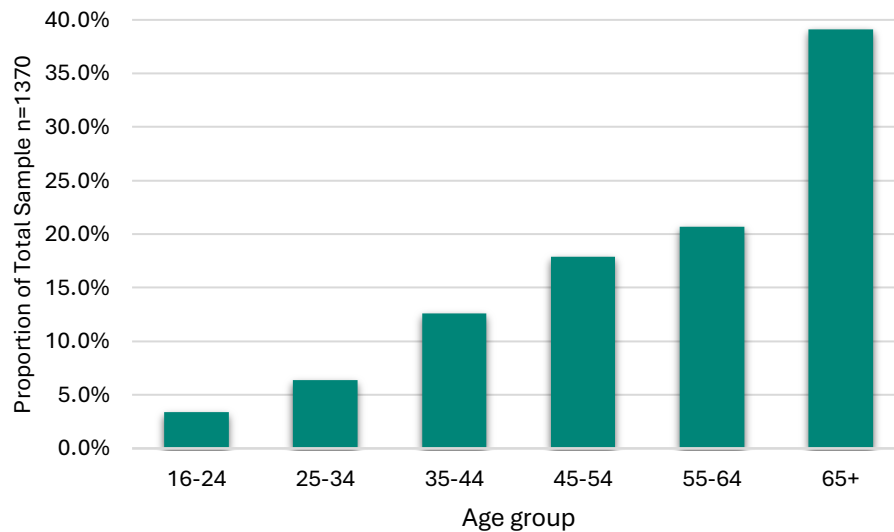


Figure 2 Total Sample Age Profile

A breakdown of usual licence type purchased by age groups is shown in Figure 3. There are much higher frequencies of those having purchased both licence types at least once in the past 5-years across all age groups, compared to 2024. The smallest increase was in the 65+ (17% to 20.1%) and the largest increase was in the under 24 age group (20.8% to 42.6%). Changes in purchasing habit question framing may have influenced results³.

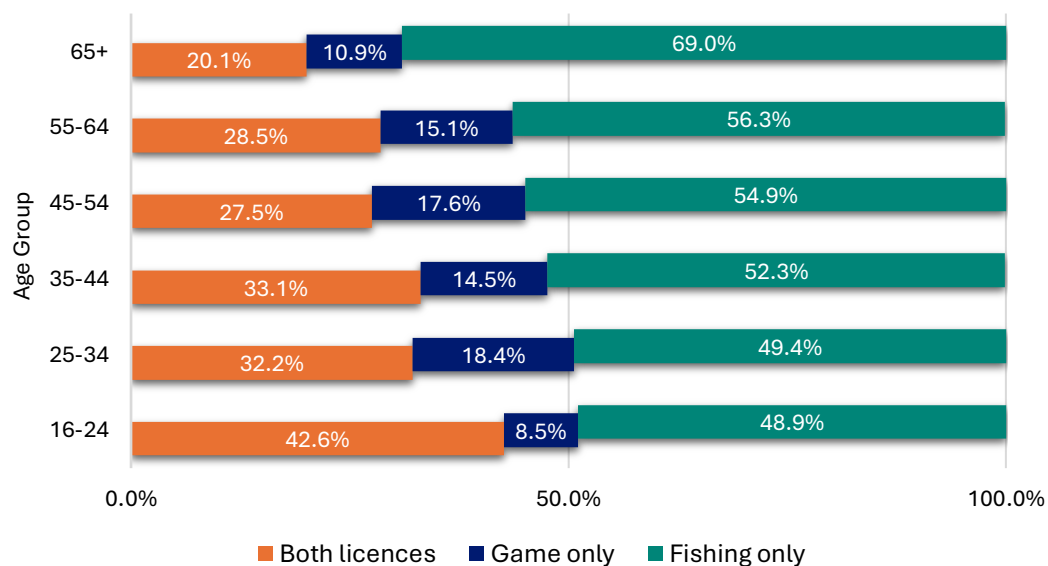


Figure 3 Usual Licence Purchasing Habit as a Proportion of Age Groups

³ The question changed from an emphasis on 'usual' purchasing behaviour in 2024 to a specified 'have you purchased at least once in the past 5-years' in 2025.

5.1.2 Gender

The gender proportions of the sample were 92% male and 7.8% female, which were identical to 2024. Less than 1% preferred-not-to-say. These proportions closely reflected those of the F&G database. Figure 4 shows licence purchasing habit as a proportion of gender⁴ and shows angling attracts 95% of female participants in the survey. The frequency of having purchased a Game licence in the past 5-years increased in both male and female compared to 2024.

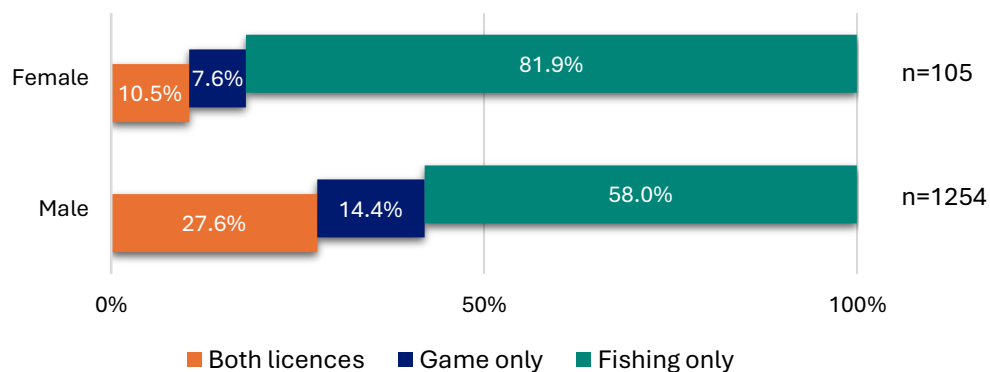
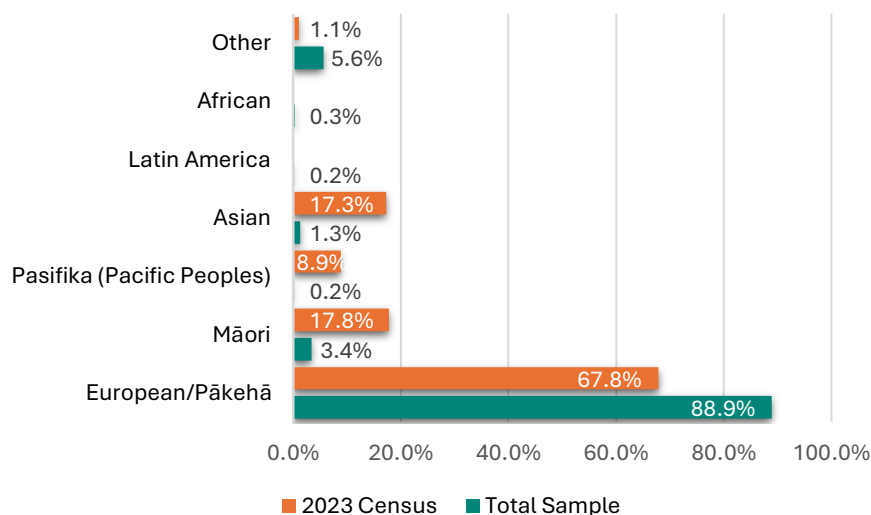


Figure 4 Usual Licence Purchasing Habit as a Proportion of Gender

5.1.3 Ethnicity

Figure 5 shows the sample largely identified as European/Pakeha and demonstrates an underrepresentation of Māori and other ethnic minorities. The profile was near identical to that of 2024.



*Note: African, Latin American, and Middle Eastern are a combined group in NZ Census reporting and this was 1.9% of the population (Stats NZ, 2024).

Figure 5 Total Sample Ethnicity Profile Compared to the 2023 NZ Census

⁴ Only the two main genders are shown, as the proportion of the remaining two respondents does not lend itself to graphical representation.

Usual licence purchasing behaviour for the sample as a proportion of each ethnicity is shown in Figure 6. Māori had a reduction in dual licence purchase history compared to 2024, whereas European/Pākehā showed a slight increase. Any inference taken from the results for ethnic minorities should be approached cautiously given their very small sample size.

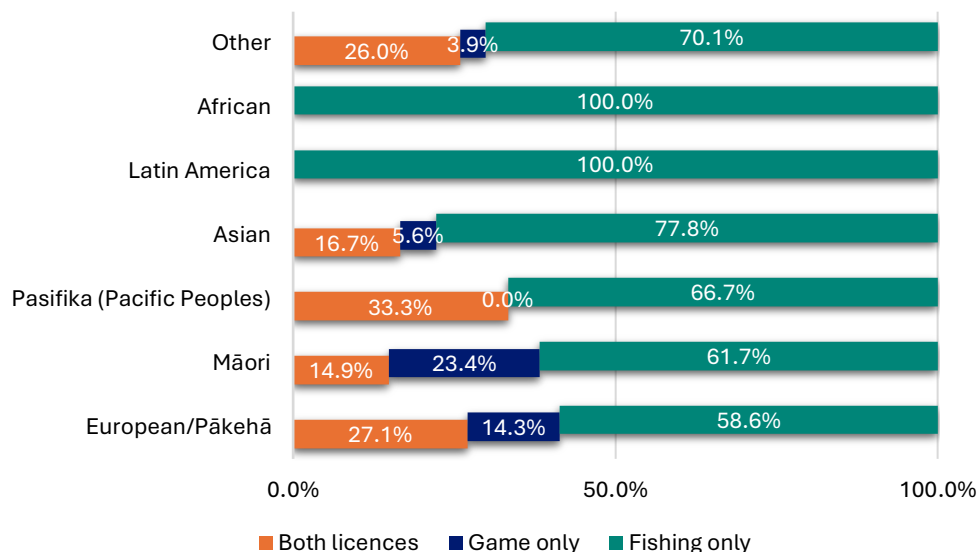


Figure 6 Usual Licence Purchasing Habit as a Proportion of Ethnicity

5.1.4 Dependent children

Of the total sample, 32.8% had dependent children, which was an increase from 23% in 2024. The usual licence purchasing habit for those with and without dependent children is shown in Figure 7. Those without dependent children were a little more angling focussed while those with dependent children had a higher frequency of having purchased both licence types at least once in the past 5-years.

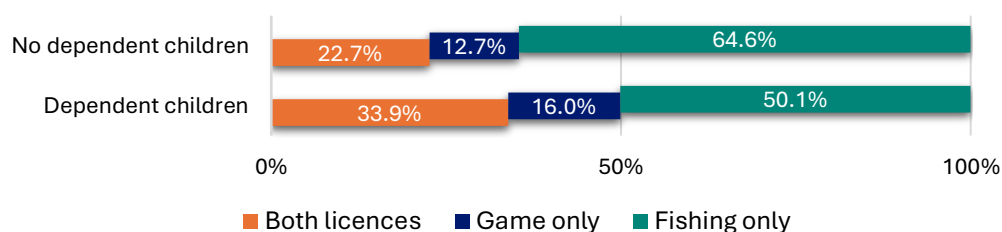


Figure 7 Usual Licence Purchasing Habit as a Proportion of Dependent/No Dependent Children

5.1.5 Household income (before tax)

The 2025 mean New Zealand household income was \$135,092 (Infometrics, 2025). It is likely the proportion of respondents with a household income over \$200,000 is over-represented in the sample, however, the proportion may also be indicative of the F&G customer base.

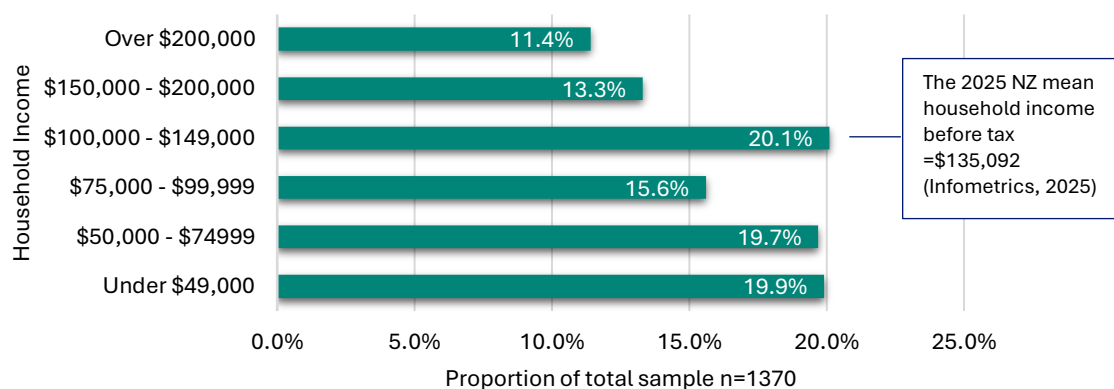


Figure 8 Household Income of the Total Sample

Usual licence purchasing habits by income bracket are shown in Figure 9. The proportion of game licences purchased tends to increase with income and the proportion of dual purchases was highest in the over \$200,000 bracket, closely followed by \$100,000 – \$149,000 households. This year the lowest income bracket choice was *Under \$49,000*.

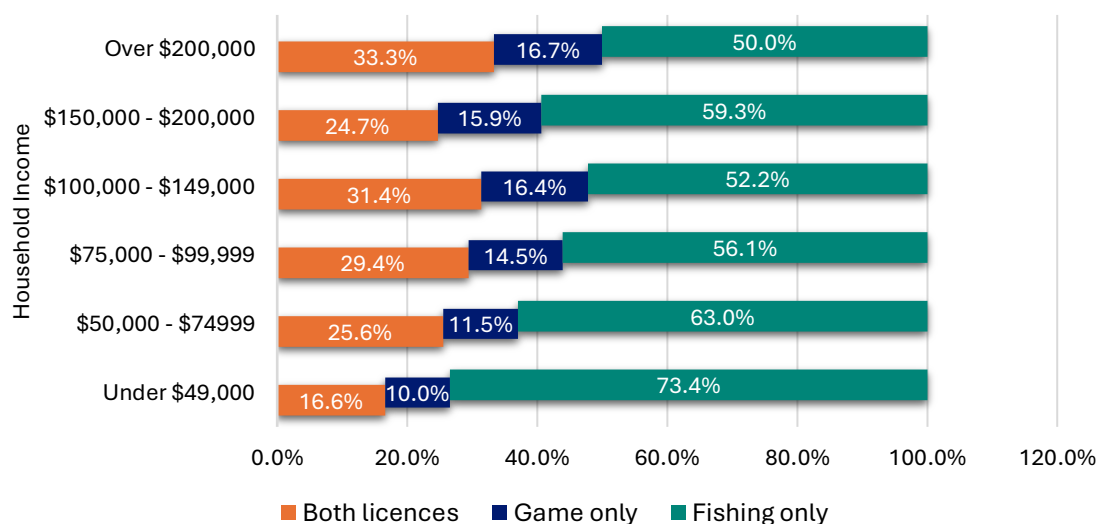


Figure 9 Usual Licence Purchasing Habit as a Proportion of Household Income Brackets

5.1.6 Sample breakdown by F&G region

The proportions of the total sample from each of the F&G regions is shown in Figure 10. When compared against the F&G database, Auckland/Waikato and North Canterbury are somewhat overrepresented while Central South Island, Otago, and Eastern are somewhat underrepresented. Minor variation occurs across the remaining regions. This mirrors the results from 2024.

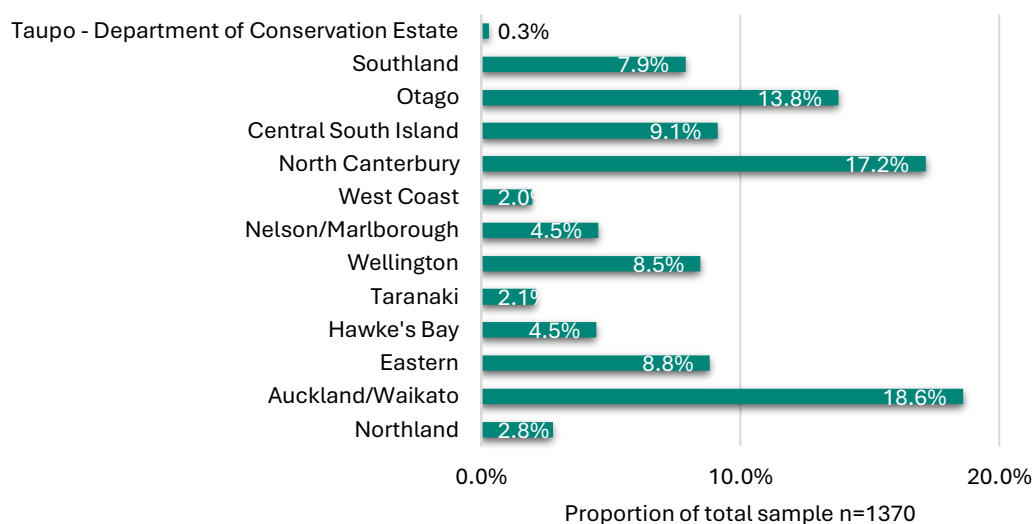


Figure 10 F&G Regions as a Proportion of the Total Sample

Figure 11 details the usual licence purchasing behaviour of respondents in each F&G region.

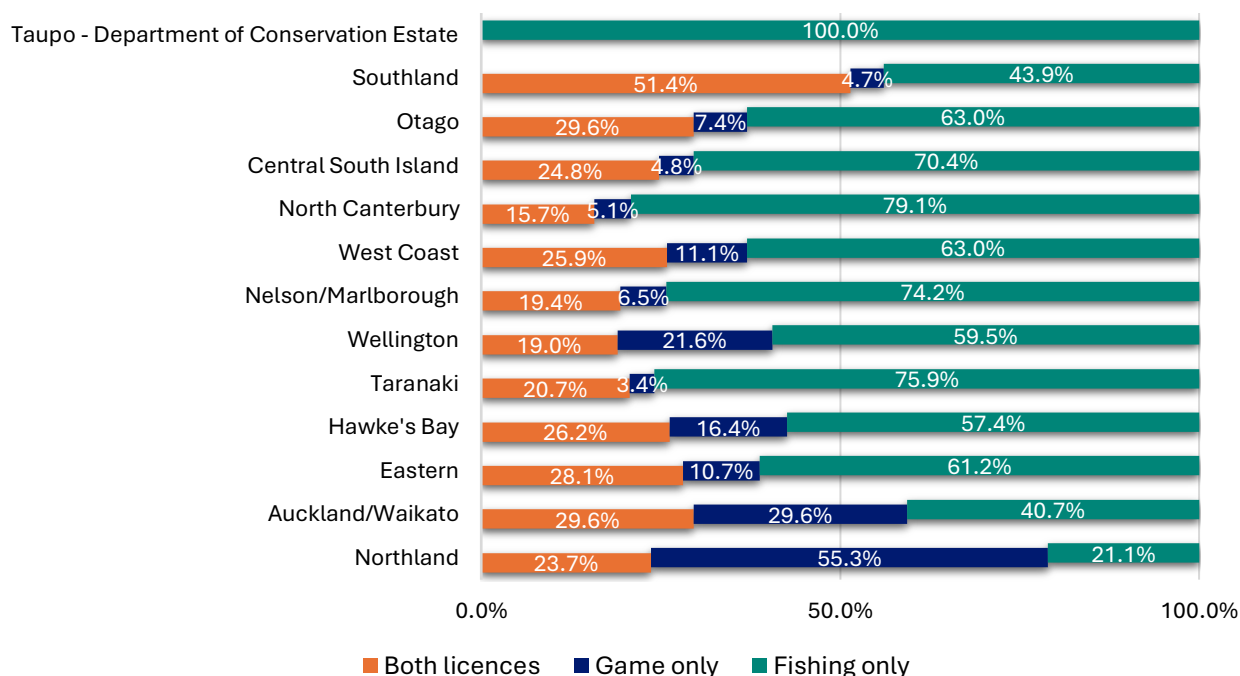


Figure 11 Usual Licence Purchasing Habit as a Proportion of Each F&G Region

The Northland, Auckland/Waikato, and Southland samples stand out as the most heavily Game-oriented and all had increased rates of dual licence purchase over the past 5-years. The West Coast was the only region to have a drop in those having purchased both licence types compared to 2024. All other regions were characterised by a high proportion of angling, the Central South Island, North Canterbury, Taranaki, and

Nelson/Marlborough held the highest proportions of those usually purchasing only fishing licences.

5.1.7 Understanding of Regional F&G Council's role and activities

Respondent's self-assessed understanding of the role and activities of their regional F&G Council is shown in Figure 12, and the proportion of usual licence purchasing habit for each level of understanding is shown in Figure 13. Eighty-nine percent of respondents felt they had at least some understanding of their regional F&G Council mirroring the result from 2024. Those rating themselves as having an excellent understanding had the highest rate of purchasing both licences at least once in the past 5-years (47.3%).

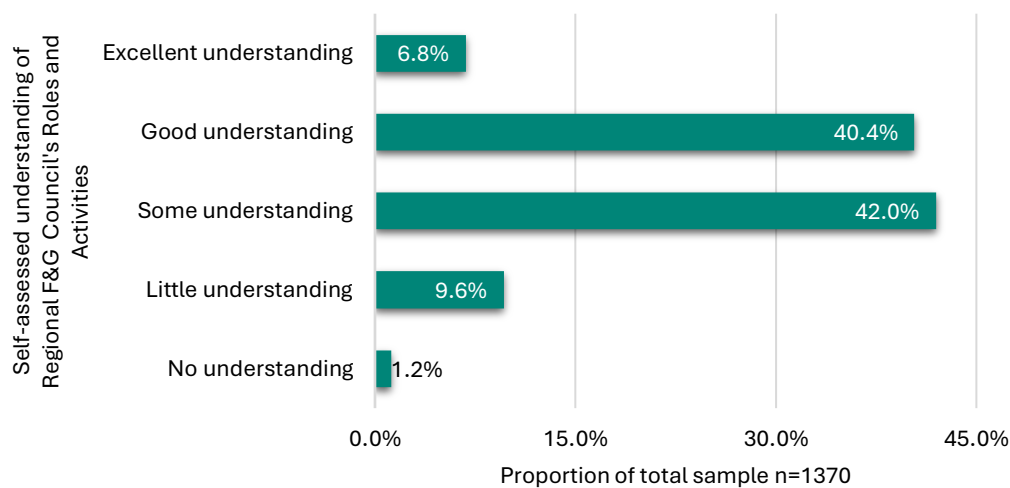


Figure 12 Understanding of Regional F&G Council's Role and Activities

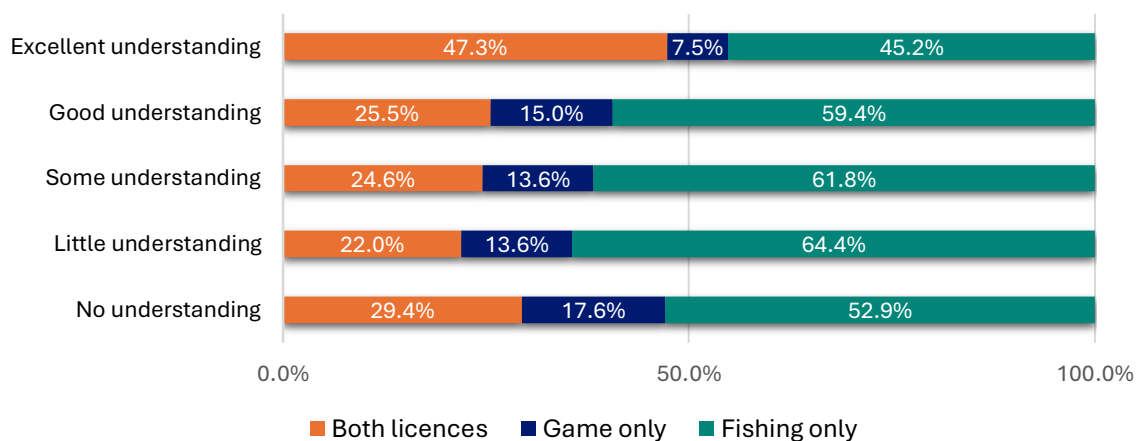


Figure 13 Usual Licence Purchasing Habit as a Proportion of the Level of Understanding of Regional F&G Council's Role and Activities

5.2 Priorities for service attributes

Service attributes and their respondent-facing descriptions are shown in [Table 1](#) and their rank-orders, based on each attribute's positional weighted mean score, are shown in [Figure 14](#). Except for *Water Conservation Orders* (see [Section 4.1](#)), the rankings of the top-5 attributes from last year mirrored exactly those of the extensive MaxDiff study applied in 2024. While this methodology has less to offer, the results give confidence to the order of licence-holder priorities.

Table 1 Respondent-facing Service Attribute Descriptions

Service attribute	Respondent-facing service attribute descriptions
Access	Working to ensure access to waterways (rivers, lakes, and canals).
Ecology monitoring	Monitoring the ecology of rivers, lakes, and wetlands.
Fish Pop. Monitoring	Monitoring fish populations and spawning sites.
Advocacy	Participating in legal processes to provide for healthy freshwater habitats and the protection of outstanding lakes and rivers.
F&G owned wetlands	Maintaining and investing in Fish & Game owned and managed wetlands and waterbodies.

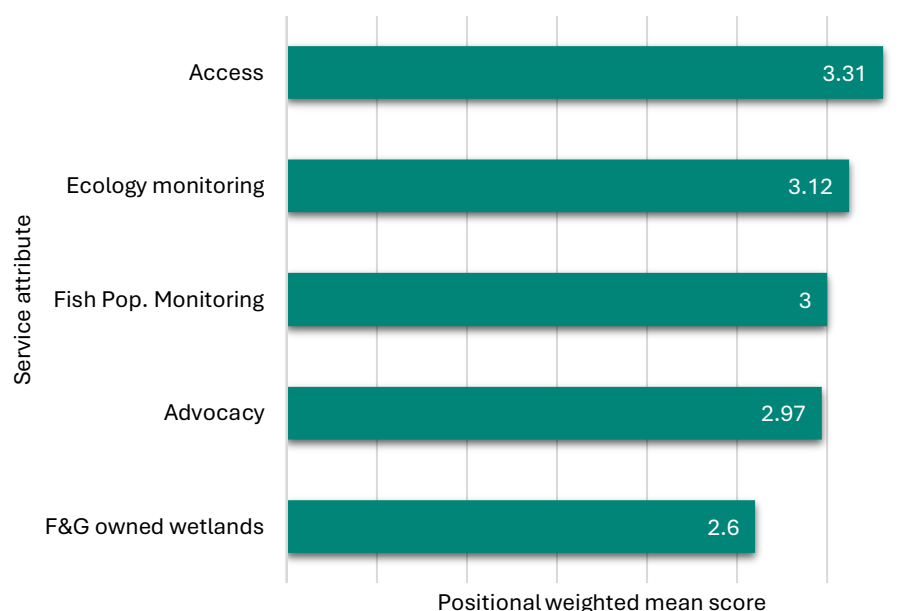


Figure 14 Respondent's Priorities for F&G Service Attributes

5.3 Access

This section details respondent's answers to a set of questions regarding access. Weighting for age and F&G region have been applied at the researcher's discretion. In general, perception-oriented questions have been weighted. Analysis of unweighted questions will usually include either a breakdown by age, region, or both. Unless otherwise stated, figures are unweighted.

5.3.1 Licence-holder's modes of access to hunting and fishing locations

Most (65.8%) respondents made access to the locations they hunted or fished via public access points (other than Department of Conservation land) and about half that number (33.2%) used F&G negotiated access across private land. There was a stark difference between the access patterns of those that had only purchased a Game licence in the past 5 years and those who had only purchased a Fishing licence. Public access points (other than Department of Conservation land) were used by 80% of solely Fishing-oriented respondents and just 36.5% of solely Game-oriented respondents. Conversely, 52.4% of Game-oriented respondents made access by negotiating with private landowners compared to just 13.6% of Fishing-oriented. Modes of access are detailed in [Table 2](#). Percentages sum to more than 100 as respondents could select as many options as were applicable.

Table 2 Modes of Access to Hunting and Fishing Locations

Mode of access to hunting or fishing locations	All respondents	Game only	Fishing only
Public access point (other than Department of Conservation land).	65.8%	36.5%	80.0%
Fish & Game negotiated access across private land.	33.2%	14.3%	38.5%
Access through Department of Conservation land.	30.1%	15.9%	33.7%
Negotiated access across private land.	28.1%	52.4%	13.6%
Access across own/family/employers land.	19.8%	37.0%	9.9%
Unsure.	2.7%	1.1%	3.8%
Other.	0.7%	0.5%	1.0%

Modes of access by F&G region are shown in [Figure 15](#). Northland (28.9%), Taranaki (31%), and Southland (52.8%) have the lowest rate of public land access with North Canterbury (77%), Central South Island (76.8%), Hawke's Bay (72.1%), and Otago (70.4%) having the highest. Nelson/Marlborough (51.6%) has the highest rate of F&G negotiated access across private land, while Auckland/Waikato (22.7%) had the lowest. The West Coast (48.1%) had the highest rate of access across Department of Conservation land. North Canterbury stood out as having the lowest rate of both access across own/family/employers land (8.1%) and privately negotiated access (15.7%). The highest rate of privately negotiated access was in Northland (44.7%).

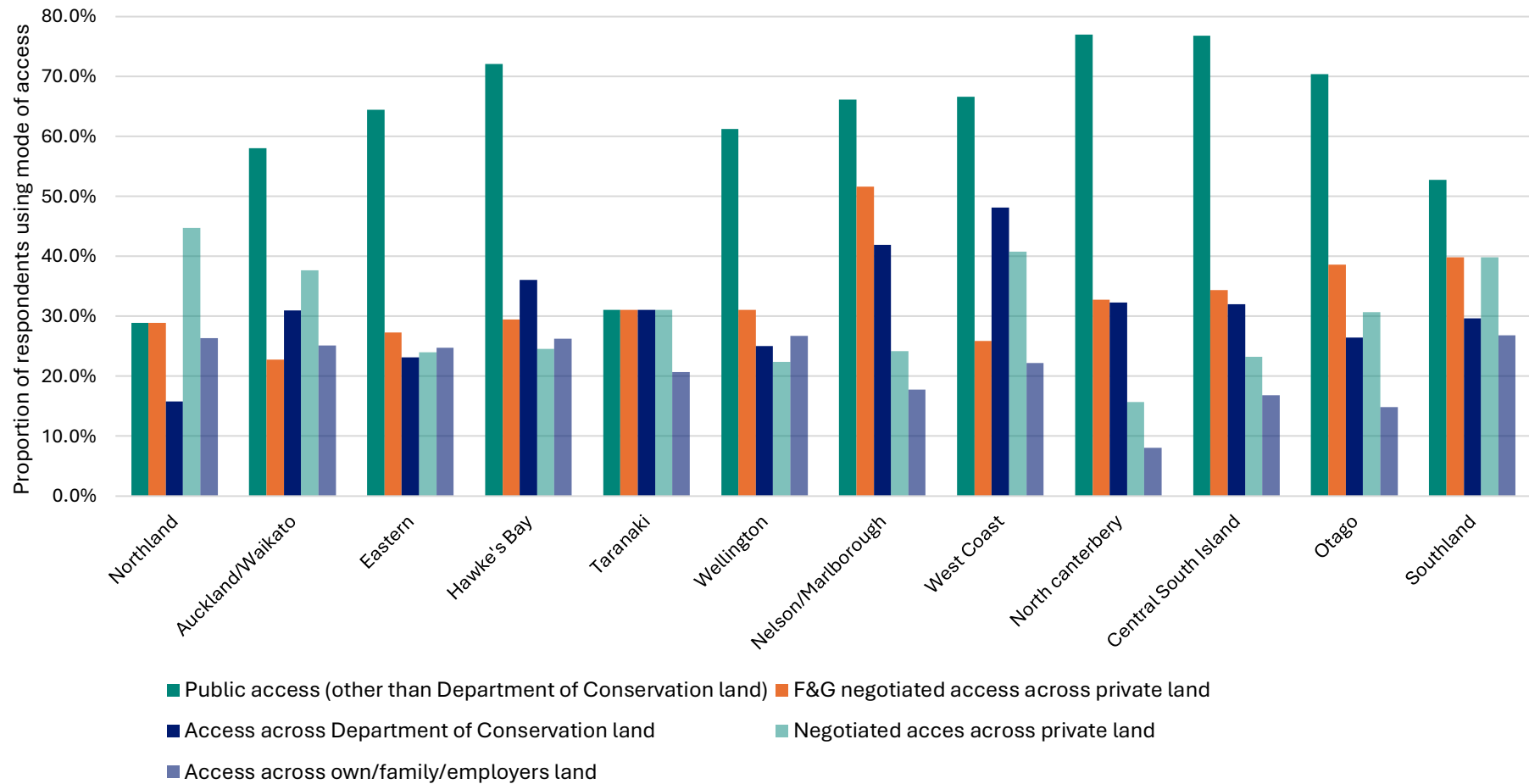


Figure 15 Mode of Access by F&G Region

5.3.1

The proportion of respondents making use of F&G access tools is shown in Table 3. The most utilised access tool is F&G signage 47.4%. Printed brochures and their downloadable equivalent were used equally and personal contact with the local F&G team was the least utilised access tool. Approximately a quarter used the interactive maps on the F&G website and 28.8% did not use F&G access tools at all. Of the 46 respondents selecting *Other*, 19 used either topographical maps from LINZ or DOC, or Google Maps, eight relied on friends or sports retailers, and seven entirely self-navigated.

Table 3 Utilisation Rates of F&G Access Tools

F&G Access Tools	Proportion (%) of respondents utilising access tool
Fish & Game signage.	47.4
Printed Fish & Game brochures.	29.3
Downloadable or printable brochures on Fish & Game's website.	29.2
Don't use any Fish & Game tools to find access points.	28.8
The interactive access map on Fish & Game's website.	26.8
Fish & Game emailed Newsletters (Reel Life and Both Barrels).	24.3
Outdoor Access Maps on the Herenga ā Nuku website (Walking Access Commission).	14.0
Fish & Game social media (e.g Facebook).	11.9
Personal contact with your local F&G team including phone, text, email, or similar.	8.2
Other (please specify)	3.3

Weighted analysis revealed that 86% or respondents found F&G signage to be at least *somewhat helpful*, with 50% finding it either *very* or *extremely* helpful. A breakdown of the perceptions of F&G signage for all respondents and by respondent's orientation towards being either Game-only, Fishing-only, or engaging in both sports is shown in Figure 16.

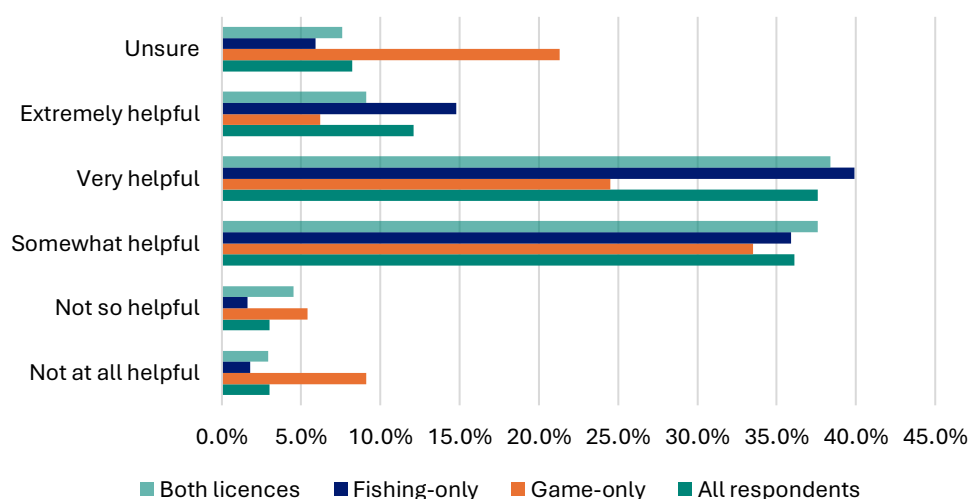


Figure 16 Perceptions of F&G Signage

Those oriented towards Game only had high rates of uncertainty (21.3%) and relatively high rates of negative ratings (14.5%). This may reflect the high rate of access across private land for these hunters, see [Table 2, p. 16](#). Those solely Fishing-oriented found the signage to be most helpful with 54.7% finding signage *very* or *extremely helpful*.

5.3.2 Blocked access and changes in accessibility over time.

Overall, 19.2% of respondents had experienced blocked access to hunting and/or fishing locations in the past 12-months. Experiences of blocked access by F&G region are shown in [Figure 17](#). Hawke's Bay had the highest rate of those experiencing blocked access, possibly a residual effect of the 2023 Cyclone Gabrielle, and Auckland/Waikato had the lowest.

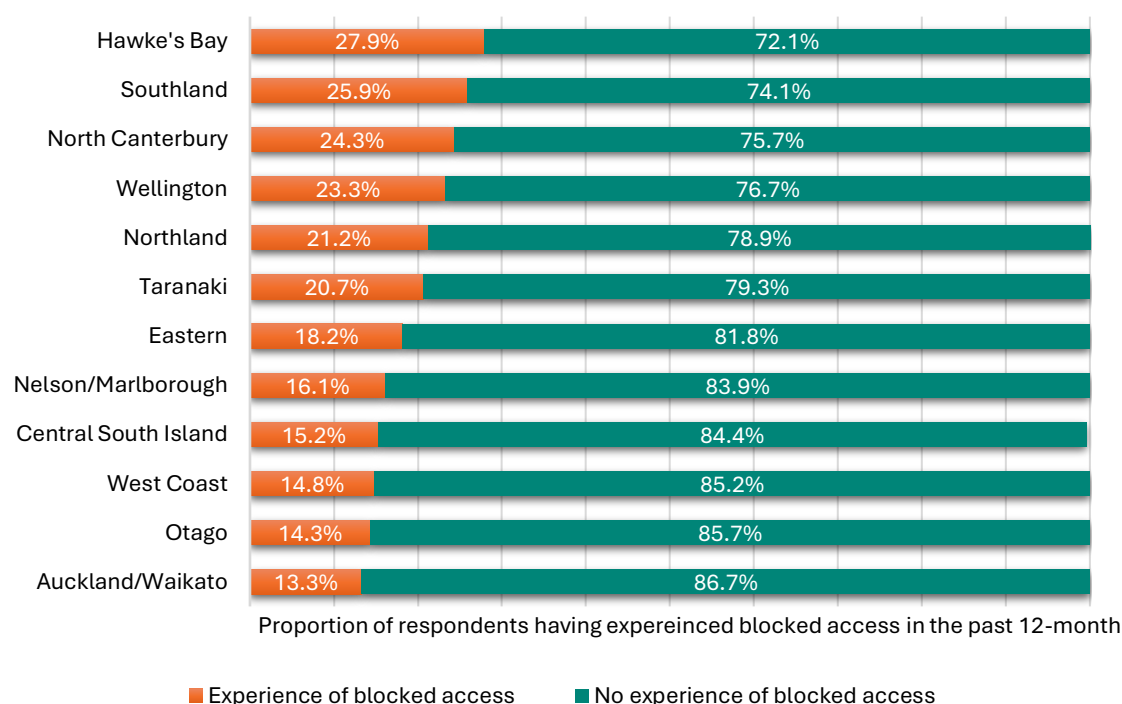


Figure 17 Experience of Blocked Access Over the Past 12-months

Respondent's perceptions of accessibility change over time are summarised in [Table 4](#). These are weighted for age and F&G region. Overall, half felt that their access had stayed unchanged over their time as a licence-holder. Twice as many found their access had *somewhat reduced* (20.2%) than found it had *somewhat improved* (9%).

Table 4 Perceptions of Accessibility Change Over Time

In your time as a licence-holder, have you found that your access has...	Proportion (%) of respondents
Very much reduced	8.3
Somewhat reduced	20.2
Neither reduced nor improved	49.4
Somewhat improved	9.0
Very much improved	2.4
Unsure	10.8

Perceptions of accessibility change by F&G region are shown in Figure 18. Respondents from four regions with the highest experienced rates of blocked access, also perceived their access to be worsening over time. As well as having the highest rate of blocked access, Hawke's Bay had the highest proportion of respondents believing their access had worsened over time.

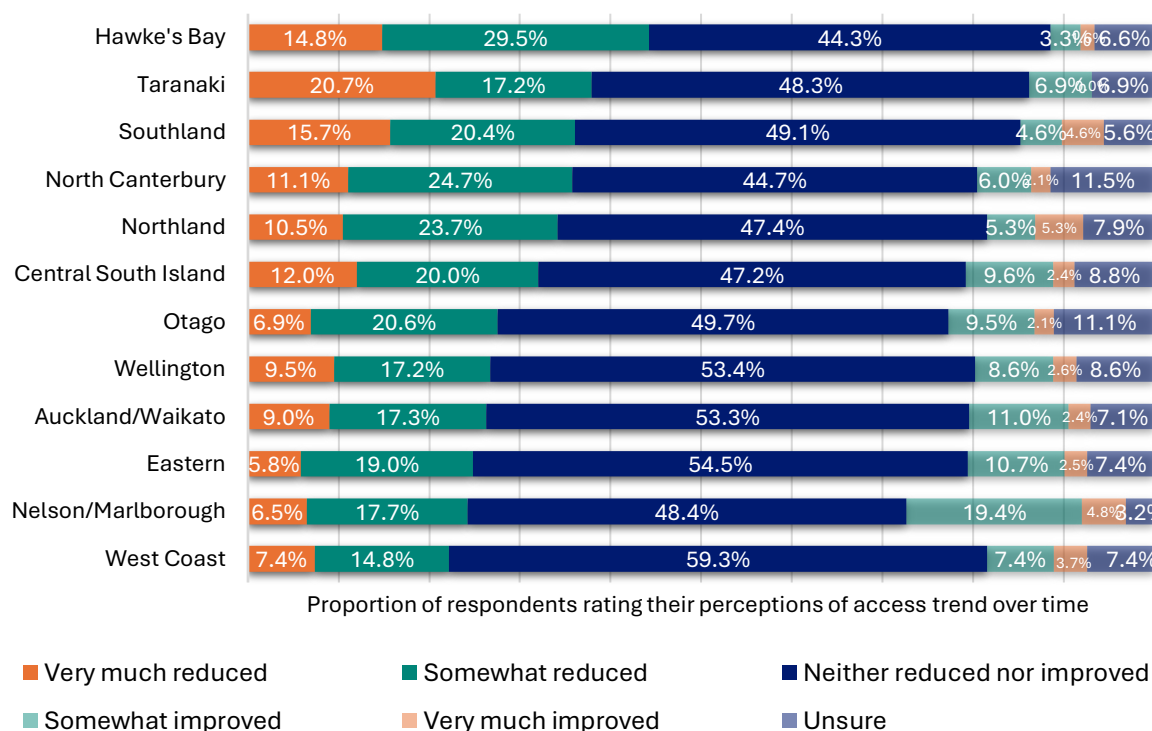


Figure 18 Perceptions of Accessibility Change Over Time by F&G Region

5.3.3 Limited mobility or disability and impaired access.

When weighted for age, 6.5% of respondents had their access impacted by limited mobility or disability. Of those, 84 (75%) chose to leave a comment telling F&G how this had impacted them and what F&G could do to improve their access. A Thematic analysis of their comments is summarised in Table 5.

Table 5 Thematic Analysis of Comments by Those with Access Impacted by Limited Mobility or Disability

Comment Theme	Proportion (%) of comments
Require vehicle access	23.8
Feel there is nothing F&G can do	20.2
Require flat access	17.9
Other	17.9
Age related frailty	16.7
Locked gates were a barrier	13.1
Clearing walking tracks would help	6.0
Require assistance crossing fences	4.8
Require wheelchair access	3.6
A disabled access list would help	2.4
More access (unspecified)	2.4
More F&G owned/managed sites focussed on disability	1.2

5.3.4 Importance of tradition when choosing access locations

The importance of tradition when choosing access locations broken down by orientation towards Game-only, Fishing-only, or those having held Both licence types are shown in [Figure 19](#). Those that purchase only fishing licences (42.4% somewhat-extremely important) appear less tradition-driven than those purchasing only game licences (62.9% somewhat-extremely important).

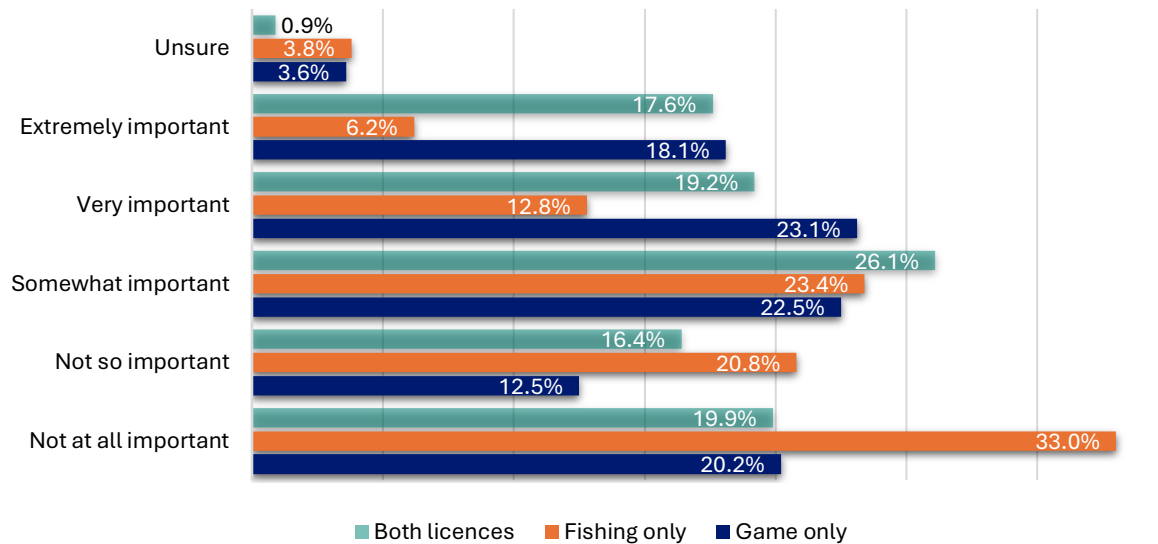


Figure 19 The Importance of Tradition When Choosing Access Locations

5.3.5 Perceptions of F&G's performance advocating for access

Weighted perceptions of how good or bad a job F&G does at advocating for access on behalf of licence-holders is shown in [Figure 20](#). The median performance rating was 4 out of 5. Forty-one percent of respondents felt that F&G does a good job of advocating for access on their behalf, however, there were very high rates of uncertainty (22.3%), which was consistent across those only-fishing and only-hunting.

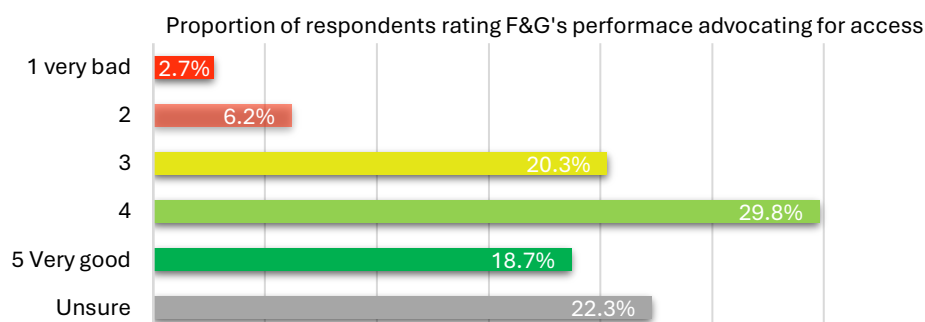


Figure 20 Perceptions of F&G's Performance at Advocating for Access

The rate of uncertainty was also consistent when broken down by region, with the exceptions of Eastern 11.8% and Central South Island 17.6%. Perceptions of F&G's performance advocating for access by region are shown in [Figure 21](#). The highest rates of negative ratings are from Southland while the West Coast had no negative ratings.

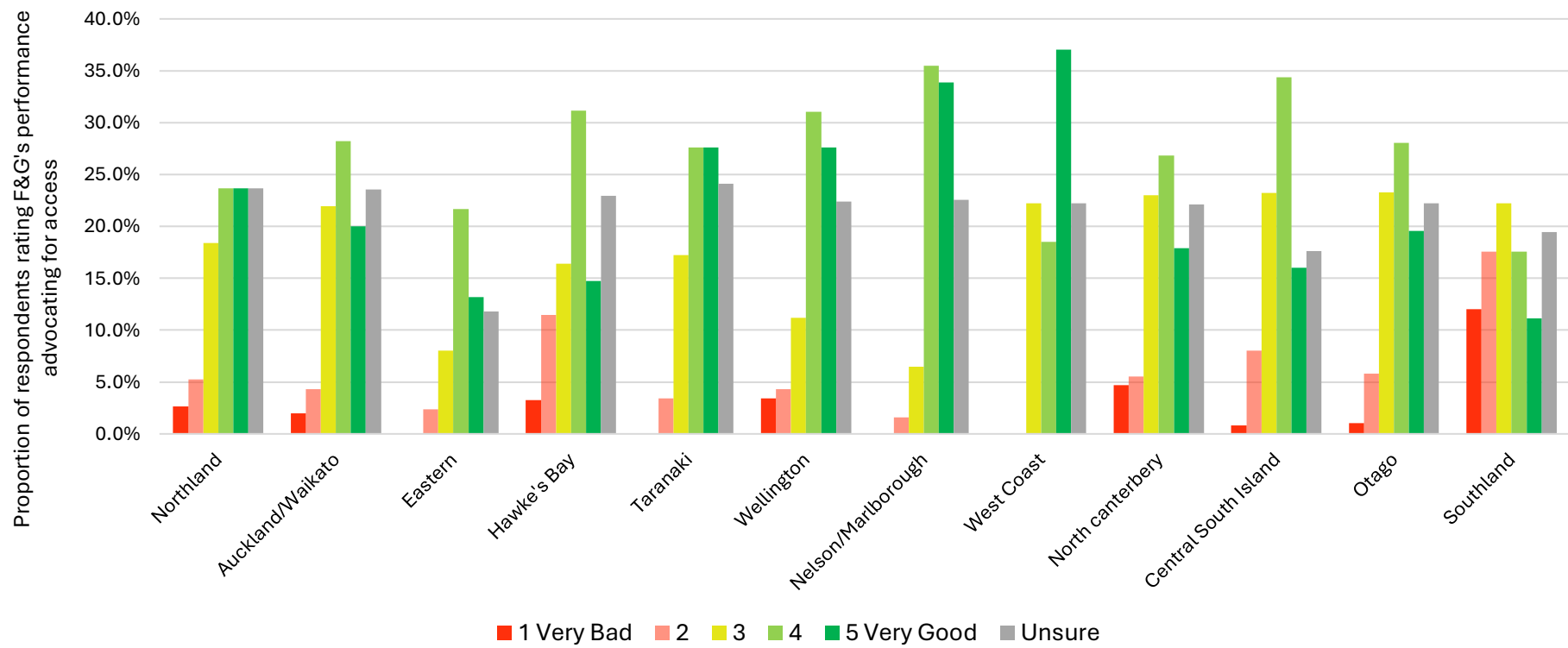


Figure 21 Perceptions of F&G's Performance Advocating for Access by F&G Region

5.4 Value

This section details respondents licence tenure over the past five years, perceptions of licence value-for-money, and reasons for not purchasing. The results have been weighted for age and F&G region, and no weighting for gender was required.

5.4.1 Fishing

Of those respondents that usually purchase a fishing licence (86% of the sample), 86.9% purchased a 2024/25 licence. Results are weighted for age and F&G region.

5.4.1.1 Fishing licence tenure over the past five years

The weighted licence tenure of those that purchased a 2023/24 fishing licence is shown in Figure 22. Most (65.3%) had purchased a licence at least four out of the past five years with the median being five out of five.

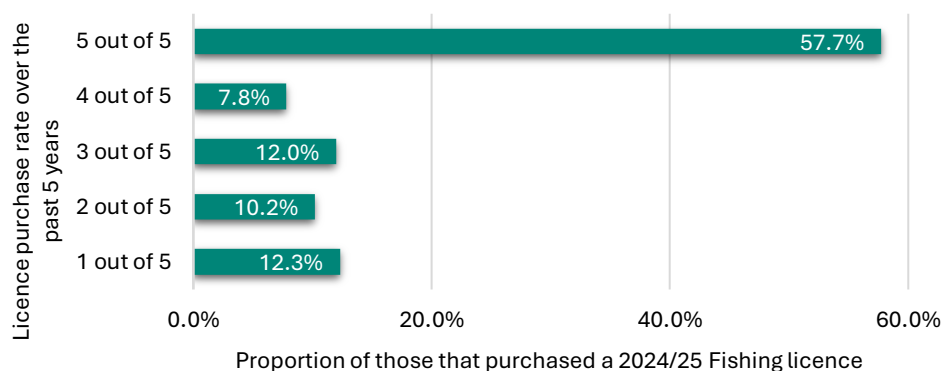


Figure 22 Fishing Licence Tenure Over the Past 5 Years

Figure 23 shows weighted fishing licence tenure by age group. The proportion of loyal year-on-year licence purchasers increases with age, and the most loyal purchasers were in the 65+ yrs age group, all of which were 'Loyal Seniors.' The highest rate of mixed licence tenure was in those between 16 and 34 yrs of age. The proportion of those between 16 and 34 yrs that are recent to the sport or irregular purchasers is unknown.

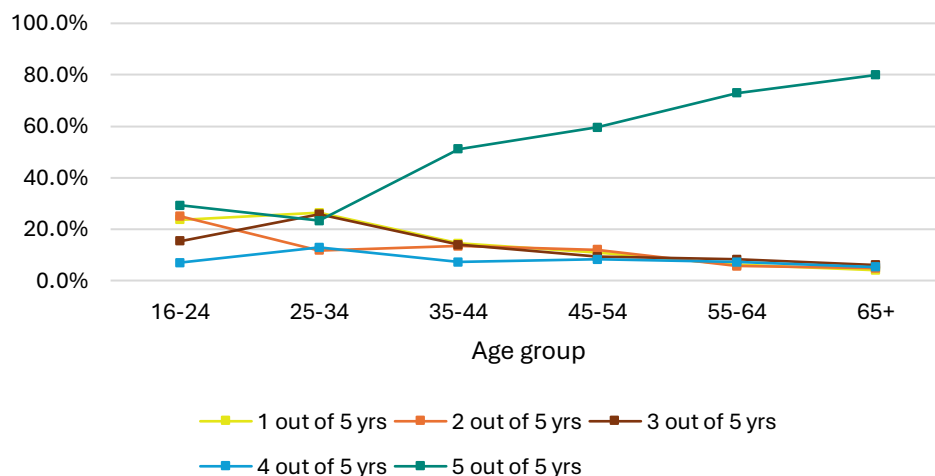


Figure 23 Fishing Licence Tenure Over the Past 5 Years by Age Group

5.4.1.2 Fishing licence value-for-money rating

The weighted distribution of fishing licence value ratings is shown in Figure 24. Most licence holders (55.1%) were positive and rated value for money as ≥ 6 . This was approximately eight percentage points lower than in 2024. The median rating for fishing licences was 6 out of 9 which was also down from 7/9 in 2024. Poor value ratings (1-4) were given by 26.8% of respondents, up seven percentage points from 2024.

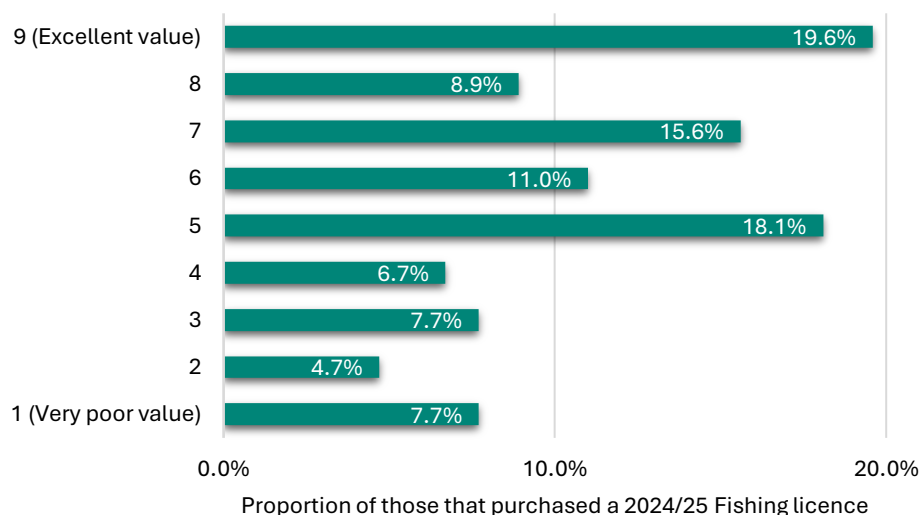


Figure 24 Fishing Licence Value for Money

5.4.1.3 Fishing licence value for money by licence type

The weighted proportion of respondents purchasing each fishing licence type are shown in Table 6 and the perceived value for money by licence type is shown in Figure 25. In 2024/25, whole season fishing licence types represent 86.4% of purchases. Stoffels & Unwin (2023) define these licence types as 'Tier-1' and the proportion of tier-1 is higher in this sample than the background rate for F&G licence holders. Although these anglers are responsible for a very high proportion of angler effort (Stoffels & Unwin, 2023), this means the views of these anglers are overrepresented, as they were also in 2024.

Table 6 Fishing Licence Purchased by Licence Type

Type of 2024/25 fishing licence purchased	Proportion(%) of purchasers	
	2025	2024
Whole Season Adult	44.4	50.9
Whole Season Family	27.0	27.2
Whole Season Loyal Senior	9.3	9.8
Whole Season Adult Local Area	5.7	4.4
One Day Adult	4.1	4.1
Winter Season Adult	3.5	1.7
Short Break Adult	2.3	1.3
Whole Season Junior	1.4	NA
Long Break Adult	1.0	0.6
Total	100	100

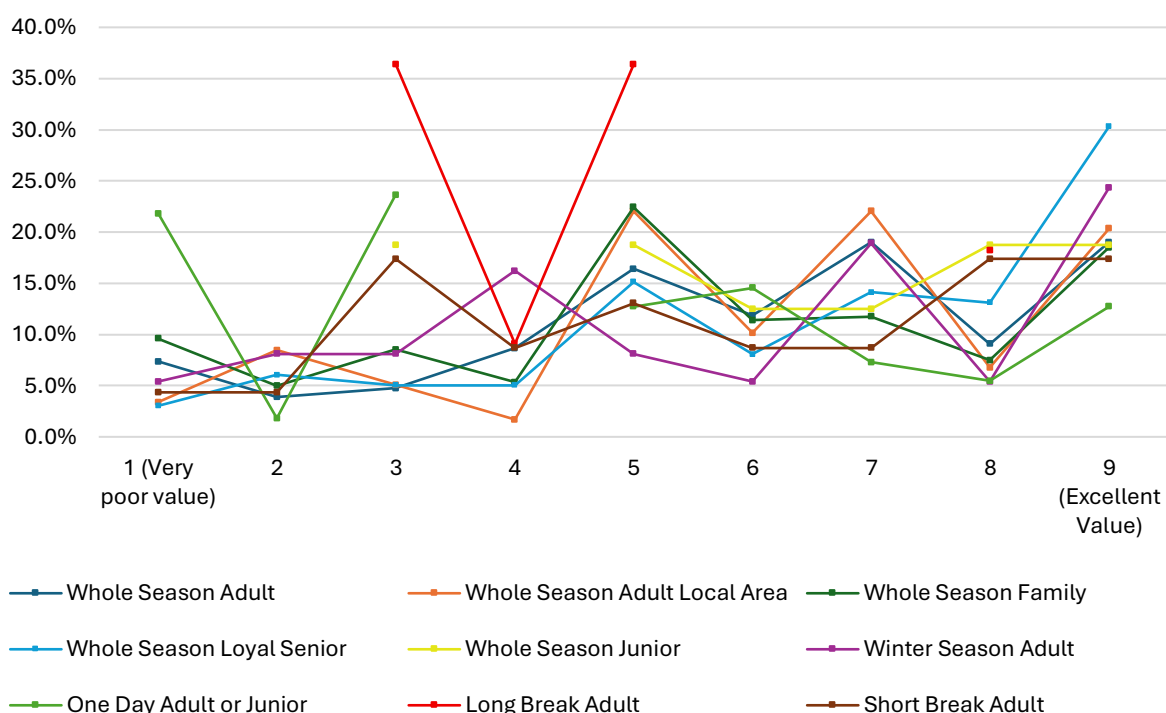


Figure 25 Fishing Licence Value for Money by Licence Type

The highest proportion of ‘Excellent value’ ratings were among *Whole Season Loyal Seniors* (30.3%, down 14.3 percentage points from 2024), *Winter Season Adult* (24.3%, up 5.8 percentage points from 2024), and *Whole Season Adult Local Area* (20.3%, up 3 percentage points from 2024). *Whole Season Adult* had 19% ‘Excellent value’ ratings, down 8.3 percentage points from last year. *One Day Adult or Junior* had the highest rate of ‘Very poor’ ratings (21.8%).

5.4.1.4 Reasons for those changing Fishing licence type

Of the unweighted Fishing sample, 16.1% of respondents purchased a 2024/25 licence type that was different to their last purchase, and 10.8% were unsure. To avoid high rates of uncertainty, those for whom this season’s licence was their first purchase in the past 5-years were excluded from the licence change question. Reasons for changing licence type are shown in Table 7.

Table 7 Reasons for a Change in Fishing Licence Type Purchased

Reason for changing licence type from last purchase	Proportion (%)
I intended to fish more often this year.	23.8
I wanted to include my family and purchased a Family Licence.	21.2
I was looking for a cheaper option.	16.6
Other.	16.6
I turned 65 and became a Loyal Senior	7.9
I intended to fish less often this year.	6.6
I am unsure.	4.6
I was only interested in the winter season this year.	2.0
I turned 18 and was no longer a Junior.	0.7
Total	100

Almost half the entries in the *Other* category were easily re-categorised into existing response options, however, *Other* was still the third-equal most chosen category. The reasons cited were diverse and ranged from a ‘change in the family’ to ‘adding endorsements.’

5.4.1.5 Comments on how to improve fishing licence value

Fishing licence-holders were given the opportunity to comment on what Fish & Game could do to provide them with better value. In total, 310 respondents offered a comment. Rational self-interest predicted a preference for lower licence prices and the comments reflected this with 48.1% suggesting a reduction in licence cost would improve value. Only 1.6% of comments called for an increased bag or season and instead the emphasis was on increasing stocks of fish from 20% of comments. This suggests that opportunity and success was more important than bag limit. Five-and-a-half percent acknowledged that they underutilised their licence, and 4.4% stated lack of success reduced their perceived licence value. More or better maintained access was cited by 8.4% of comments. A thematic analysis of comments is detailed in [Figure 26](#).

5.4.1.6 Reason for non-purchase of a 2024/25 fishing licence

The main reason for not purchasing a 2024/25 fishing licence is shown in [Table 8](#). An increasingly busy life accounted for over a third of those not purchasing, followed by a choice to focus on other hobbies (23.1%), while 15.4% found the sport was becoming too expensive. Due to the high frequency of *Other* noted last year (39.5%), this year *Other* included a comment field to specify the response. Analysis of those responses revealed that almost all fell within the existing response options and were re-assigned accordingly. *Other* included two respondents who chose not to purchase as a form of protest.

[Table 8 Main Reason for Not Purchasing a 2024/25 Fishing Licence](#)

Main reason for not purchasing	Proportion(%) of non-purchasers
I am becoming too busy to find time	37.2
I chose to focus on other hobbies	23.1
The sport is becoming too expensive	15.4
I was unwell or injured	9.0
Other	8.3
Fishing locations near where I live were not easily accessible	2.6
I found I did not enjoy fishing	2.6
Poor weather in my area discouraged me from fishing	1.3
I felt I was no longer physically able to fish	0.6
I had concerns about my physical safety	0
Total	100

The four respondents that found they did not enjoy fishing were given the opportunity to comment. Two comments were left, and they were:

“I’m not into river fishing for trout”
“No fish around”

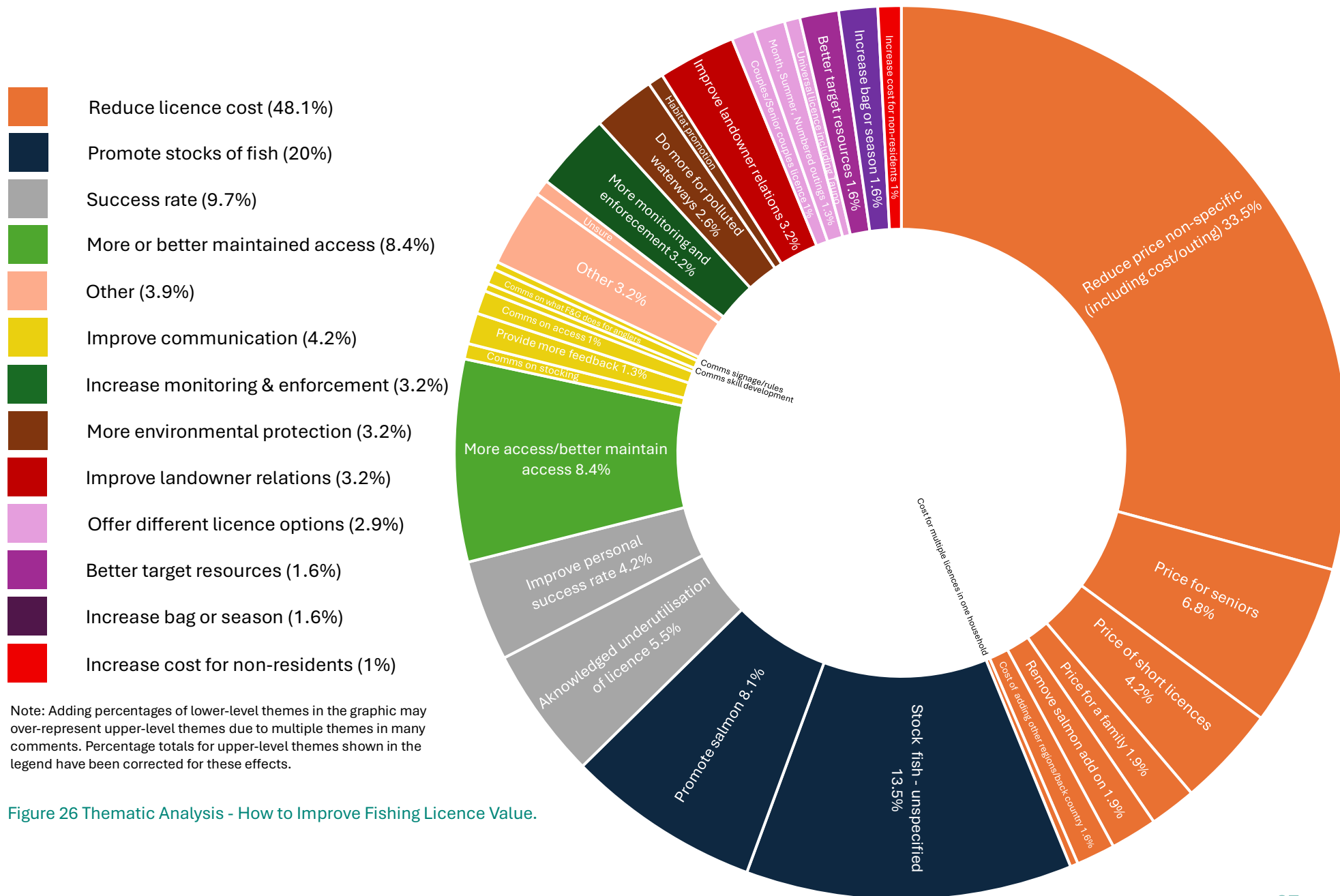


Figure 26 Thematic Analysis - How to Improve Fishing Licence Value.

5.4.1 Hunting

Of those with a usual habit of purchasing a Game Bird licence (40% of the sample), 83.3% purchased a 2025 Game Bird licence and 98.3% of those were whole-season licences. This was nearly identical to the previous year. Results are weighted for age and F&G region.

5.4.1.1 Game licence tenure over the past five years

The weighted licence tenure of those that purchased a 2025 game bird licence is shown in Figure 27. Most (84.7%) had purchased a licence at least four out of the past five years with the median being five out of five.

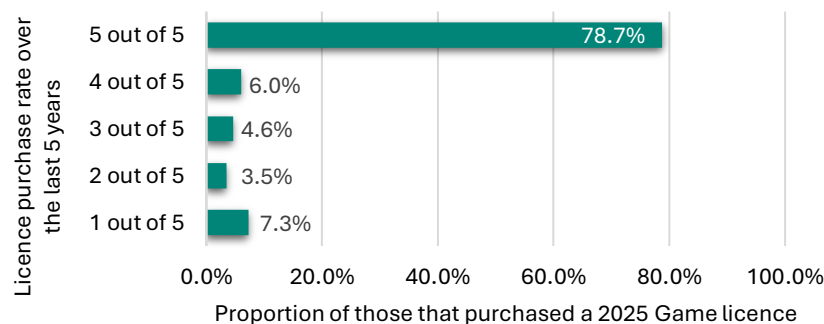


Figure 27 Hunting Licence Tenure Over the Past 5 Years

5.4.1.2 Game licence value-for-money rating

The weighted distribution of game licence value ratings is shown in Figure 28. Forty-six percent of licence-holders were positive and rated value for money as ≥ 6 . The median rating for game licences was 5 out of 9 (down from 6/9 in 2024). Poor value ratings (1-4) were given by 36% of respondents (up 5 percentage points from 2024). The proportion of licence-holders rating it as *Very poor value* had more than doubled compared to the previous year. Overall, game licences were seen as being lower value for money than fishing licences, reflecting the results from 2024.

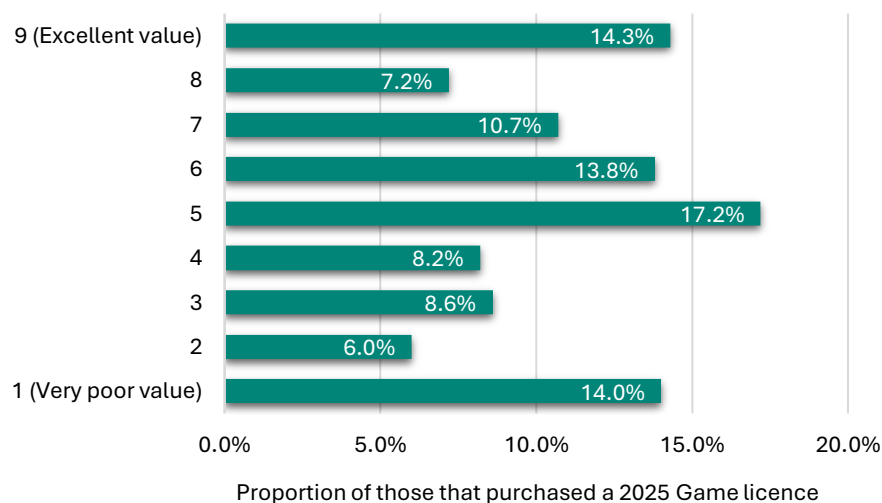


Figure 28 Game Licence Value for Money

5.4.1.3 Reasons for those changing Game licence type

Of the unweighted Game sample, 8.7% of respondents purchased a 2025 Game licence type that was different to their last purchase, and 8% were unsure. To avoid high rates of uncertainty, those for whom this season's licence was their first purchase in the past 5-years were excluded from the licence change question. Reasons for changing licence type are shown in Table 9. A change in the intended frequency of hunting accounted for 34.3% of those changing while only 10.5% were cost focussed.

Table 9 Reasons for a Change in Game Licence Type Purchased

Main reason for not purchasing	Proportion(%) of non-purchasers
I am unsure.	36.8
I intended to hunt more this year.	21.1
I intended to hunt less this year.	13.2
I was looking for a cheaper option.	10.5
Other	10.5
I turned 18 and was no longer a Junior	7.9
Total	100

5.4.1.4 Comments on how to improve game bird licence value

Game licence-holders were given the opportunity to comment on what F&G could do to provide them with better value. In total 186 offered a comment. Rational self-interest predicted a call for lower licence prices and increased allowable harvest, and the results reflected this with 45.2% suggesting a reduction of licence cost. A less restrictive set of rules, bag limit, or season was called for by 15.6% and those with a one-month season dominated those comments. Increased efforts to promote stocks of game birds was called for by 11.3% and 7% wanted different licence options. A cross-section of comments is shown below, and a thematic analysis of comments is detailed in

Figure 29.

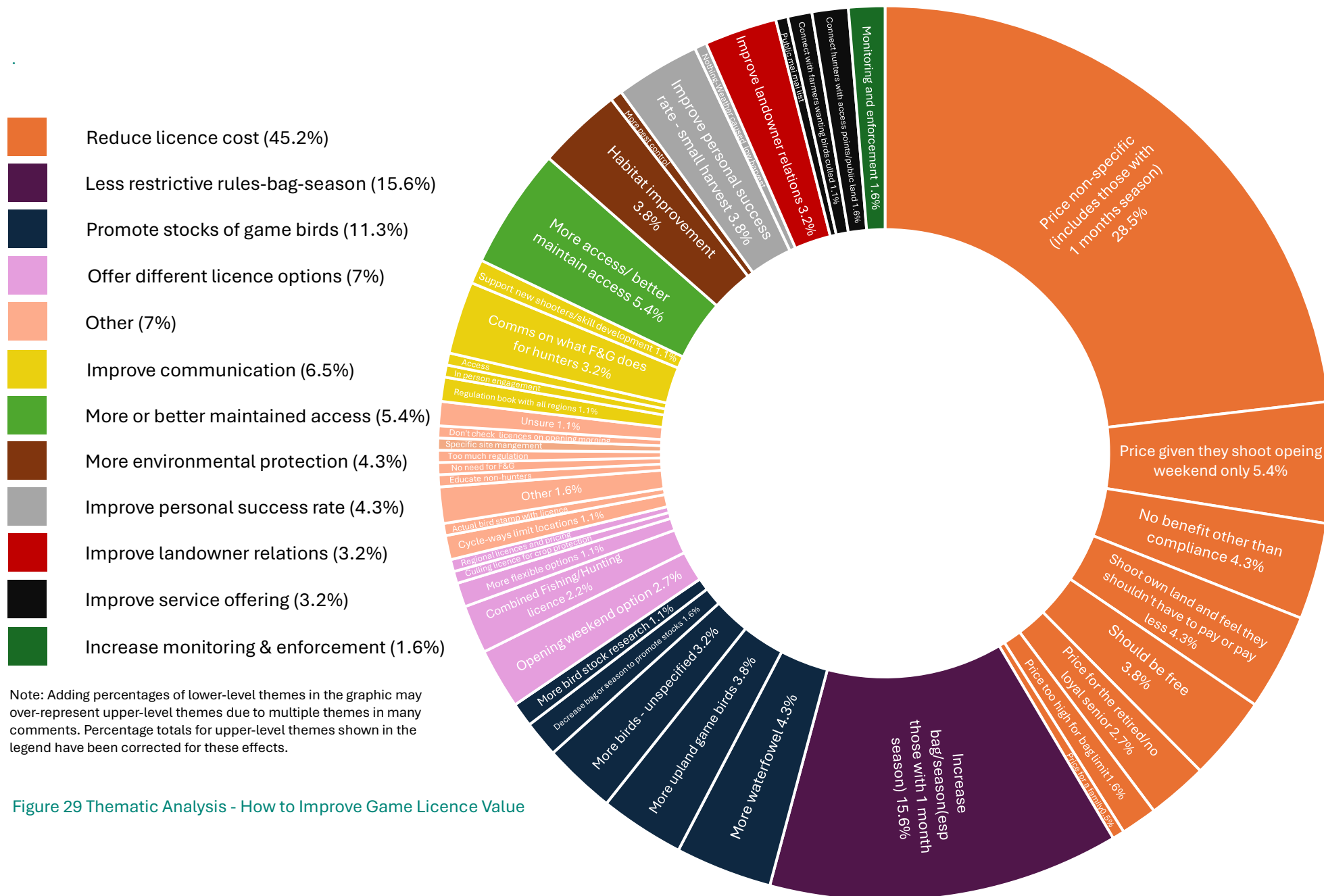
“We are controlling pests. F&G do nothing to warrant the licence fee; we’re doing them the favour”

“Reduce the license cost. Provide a dual fish and game bird licence option. Provide discounted price for people who have bought licences for many years...”

“Do a senior license as you do junior it is getting a bit expensive on a pension”

“It is just getting more expensive. Same as everything else I guess but it's making it harder to justify”

“Stop [the] building [of] cycle tracks by waterways where we once shot”



5.4.1.5 Reason for non-purchase of a 2025 game licence

In total 94 respondents that had purchased a Game bird licence in the past 5 years did not purchase a 2025 licence. The main reasons for not purchasing a 2025 game licence are shown in Table 10. Being too busy to find time was cited by 18.1% of non-purchasers, up from 12.5% in 2024. Almost 15% found the sport too expensive, and 13.8% choosing to focus on other hobbies, up from 3.2% in 2024. The addition of a field asking those choosing *Other* to specify their choice revealed that many responses were represented by existing response choices. This resulted in the frequency of *Other* reducing from 47.4% of responses last year to 25.5% in 2025. Marked increases in frequency of some categories reflect this reallocation. The most common reasons in *Other* were, only hunting their own property (6), moving region or county (5), or no longer having access to private land (3). Two chose not to purchase as a form of protest.

Table 10 Main Reasons for Not Purchasing a 2025 Game Bird Licence

Main Reason for not purchasing	Proportion(%) of non-purchaser
Other	25.5
I was too busy to find time	18.1
I found the sport was too expensive	14.9
I chose to focus on other hobbies	13.8
Game bird hunting locations near where I live were not easily accessible	11.7
I was unwell or injured	8.5
I felt I was no longer physically able to hunt	3.2
Poor weather in my area discouraged me from hunting	2.1
I found I did not enjoy game bird hunting	2.1
I had concerns about my physical safety	0
Total	100

The two respondents that found they did not enjoy game bird hunting were offered the opportunity to comment and neither chose to do so.

5.5 Performance

This section details fisher's and hunter's perceptions of F&G's performance. Respondents were asked to use a simple rating scale and were given the option to be unsure. They were then given the opportunity to offer a comment regarding the performance rating they gave. The comments were analysed according to themes and are shown in section 5.5.1. Performance ratings have been weighted for Age and F&G Region.

5.5.1 Performance rating

Q: 'How good or bad a job would you say Fish & Game does on your behalf?'

The performance ratings are weighted for Age and F&G Region and are shown in Figure 30. Overall, most licence-holders (53.9%) gave F&G a good performance rating with the median rating being 4 out of 5. Bad ratings were given by 10.5% of licence-holders. The proportion of those giving the highest rating dropped 12 percentage points from 2024 and this was mostly redistributed to the two lower ratings.

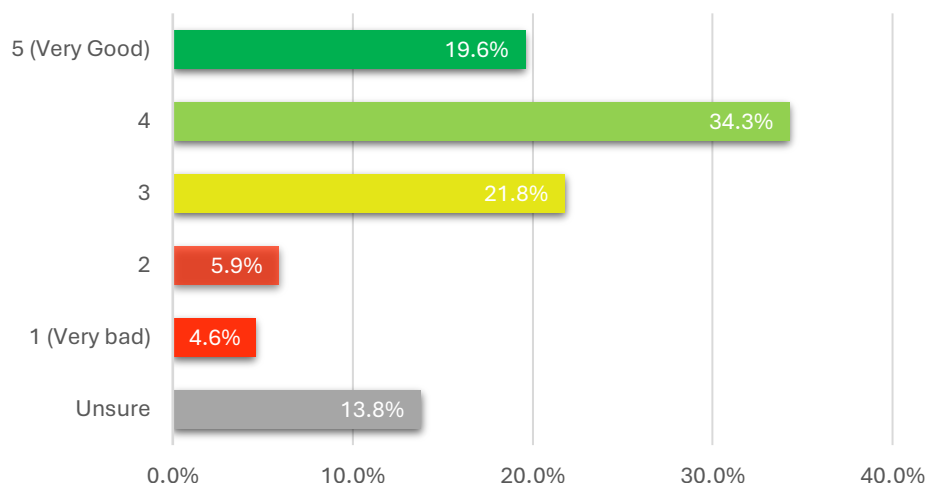


Figure 30 Customer Performance Ratings of F&G

5.5.1.1 Performance rating by age groups

Respondent performance ratings by age group are shown in Figure 31. The proportion of uncertainty is highest among the 24-34yr group which is one age group above that of last year. In a reversal of 2024, the 18-24yr age group had the lowest rate of uncertainty and the highest rate of 4 out of 5 ratings. Uncertainty across the other age groups was like that of 2024. The proportion of 'Very Good' ratings decreased across all age groups compared to last year, while the proportion was still highest among the 65+yr group.

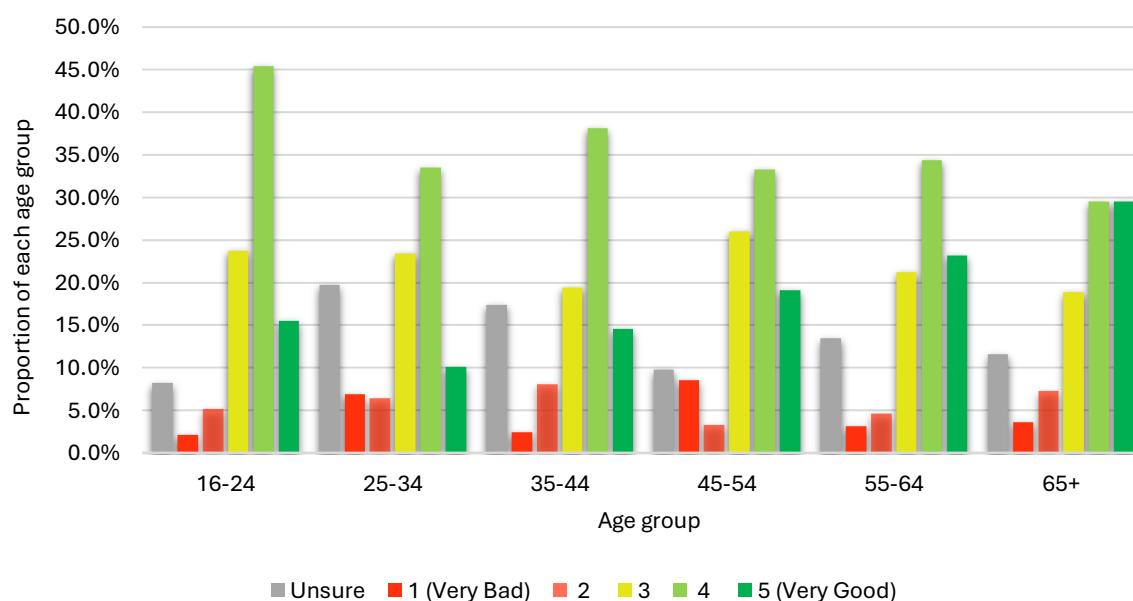


Figure 31 F&G Performance Rating by Age Groups

5.5.1 Thematic analysis of performance comments

In all, 808 respondents chose to leave a performance comment. Comments were analysed according to themes and are detailed in [Figure 32](#), [Figure 33](#), [Figure 34](#), and [Figure 35](#). Comments often had more than one theme; therefore, percentages sum to more than 100. The amplification effects of comments containing multiple themes within a single higher-order theme have been corrected for, see [section 4.1.3](#), p. 6.

Those happy with F&G felt it provided the best vehicle for their political and legal representation (31%), appreciated F&G efforts to communicate (23.9%), and efforts to promote stocks of quarry (15.6%). Licence monitoring and enforcement (13.3%) was seen as an essential element of fairness and natural justice. Good raters were also grateful of access points (22.9%) and efforts to gain more access, and of F&G's involvement in environmental protection (14.8%), especially water quality. Typical 'Good' rating comments were:

"Access to waterways, ecological work on rivers, trout counts, political pressure regarding water quality."

"Enforcing the rules, providing access, keeping angler etc updated on relevant info etc."

"Looks after waterways."

"The work they do provides me with the access and help to fulfill my hobbies and put food on the table."

"They keep you informed all season long."

"Having a national body promote and represent the interests of my passion for fishing and fishing areas is important in ensuring access and enjoyment are maintained."

"Fish & Game staff work hard to achieve their mandate under a sometimes difficult political environment."

"Out in the wild doing the right thing, keeping the fishing going."

"They were quick to respond to an email I sent regarding my concerns. And kept me up-dated with their progress."

"They were quick to respond to an email I sent regarding my concerns. And kept me up-dated with their progress."

Poor ratings were mainly associated with perceptions of insufficient efforts to promote stocks of fish and game (20.7%), disagreement with perceived conflict with farmers (17%), negative views of leadership (14.8%), high licence price (13.3%), and mismanagement of funds (14.1%). Typical comments from 'Bad' raters were:

“They want me to pay \$100 plus to shoot a pest they have let our fish stocks get depleted to a state where I have not seen a salmon in my local river for 3 years and not caught one for 10 years spending money on jet boat driver training etc.”

“Never see them doing anything in the areas I frequent, or any form of improvement. Water quality and fishing opportunities have only decreased in the past 10 years. seems like you do nothing constructive so maybe do more comms and surveys to ask license holders their priorities”

“Problems with federated farmers has meant that some access points have been blocked where I am on the Matara River. Needs to be improved with the farming community.”

“Using hunters money to subsidize fishing. Spending our money on legal cases and not releasing enough pheasants and ducks.”

“I have only seen 1 ranger in 60 years of shooting [name removed] river.”

“You are against farmers.”

“Too heavy restrictions on being able to shoot on your own property.”

“I can’t see the value [for] the cost of the licence.”

“Instead of fighting against the very people (farmers) who support your organization and blaming them for being the problem work with them on solutions instead of against them.”

Of those that were unsure of how to rate F&G’s performance, 67.5% felt they did not know enough about the organisation to rate it and 13.8% felt there was no evidence of any work having been done. Those that gave a neutral rating, valued their role of monitoring and enforcement (13.4%). Some felt that they didn’t know enough to rate F&G any higher (13.4%), although concern over conflict with farmers also featured (12.1%).

“Sporting fishing and shooting is getting more difficult in New Zealand. Greater advocacy is required at the same time as price control in these times. Catch 22.”

“[I] am not sure what they actually do.”

“Don't really have much visibility of what F&G do on a regular basis - I generally access fishing through public areas so may not benefit as much as others.”

5.5.1.1 Unsure ratings

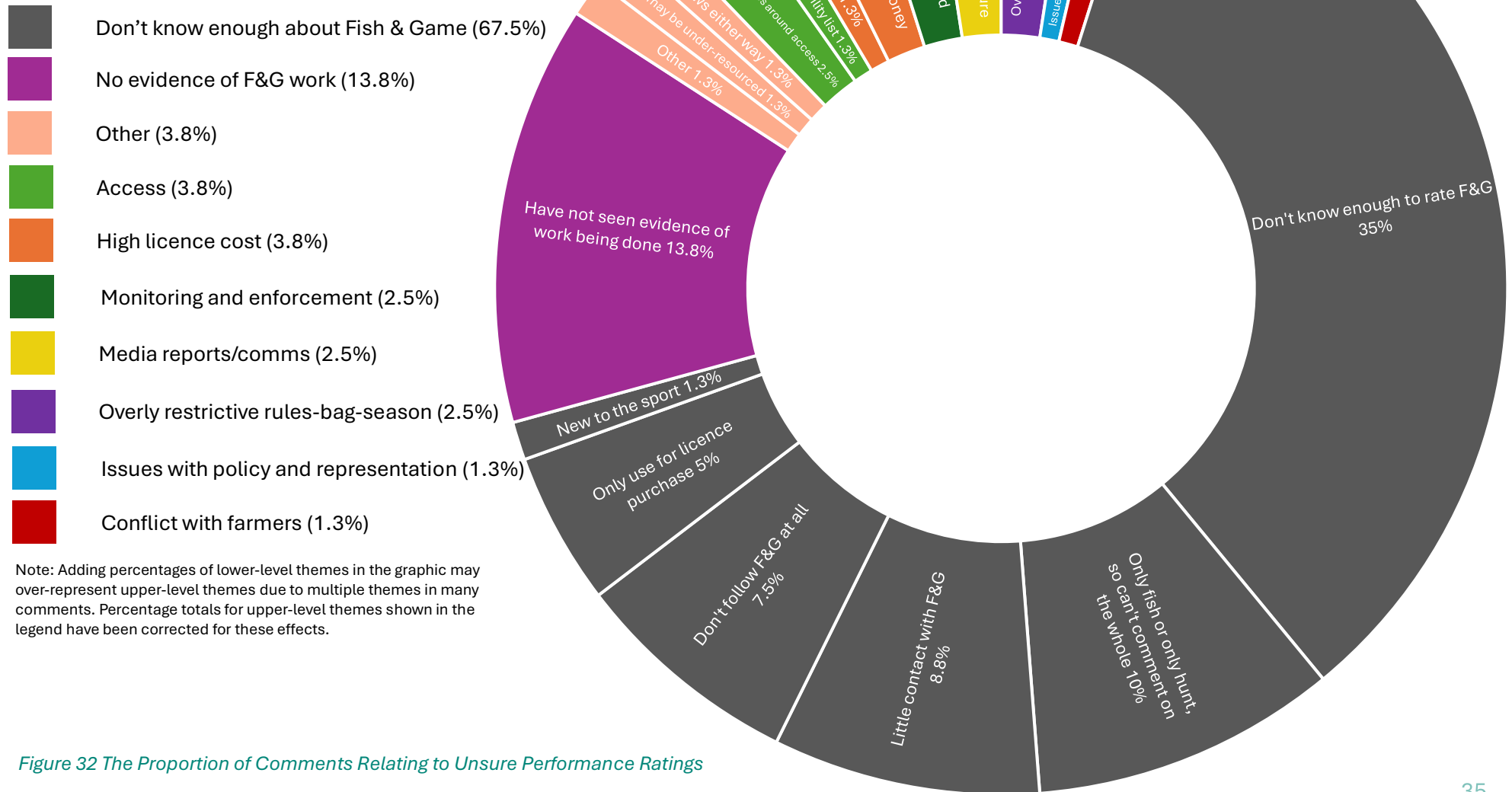


Figure 32 The Proportion of Comments Relating to Unsure Performance Ratings

5.5.1.2 Bad ratings

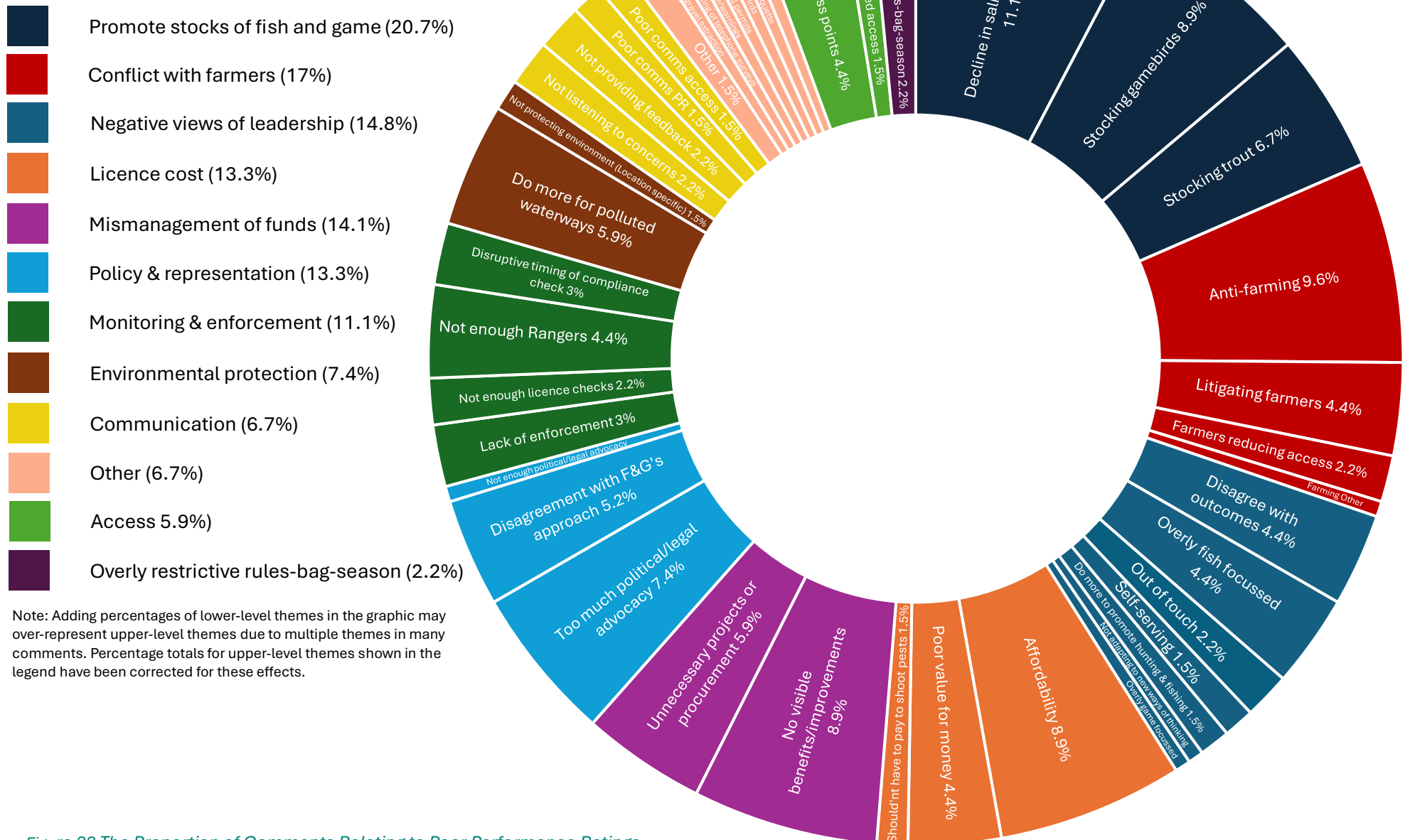


Figure 33 The Proportion of Comments Relating to Poor Performance Ratings

5.5.1.3 Neutral ratings

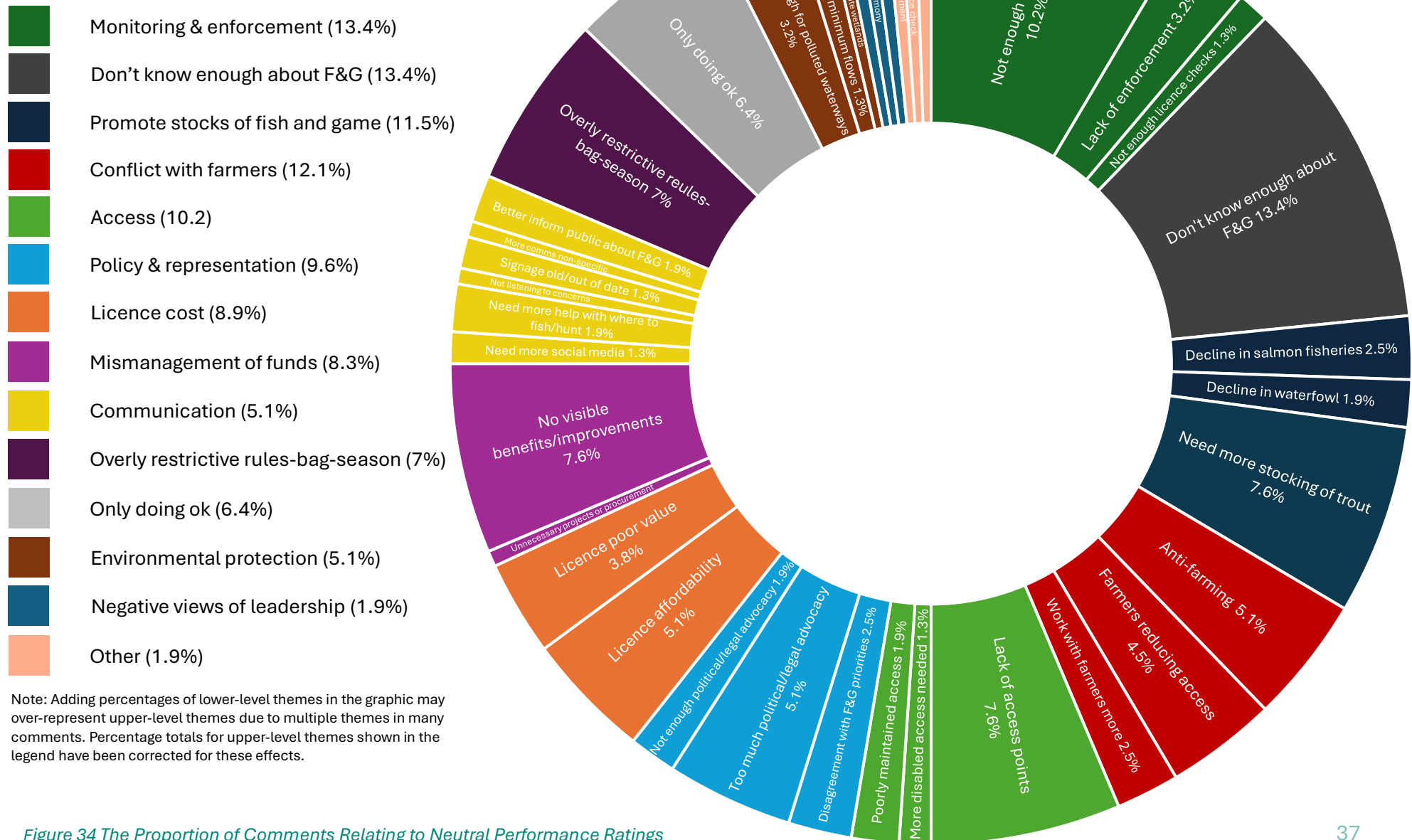
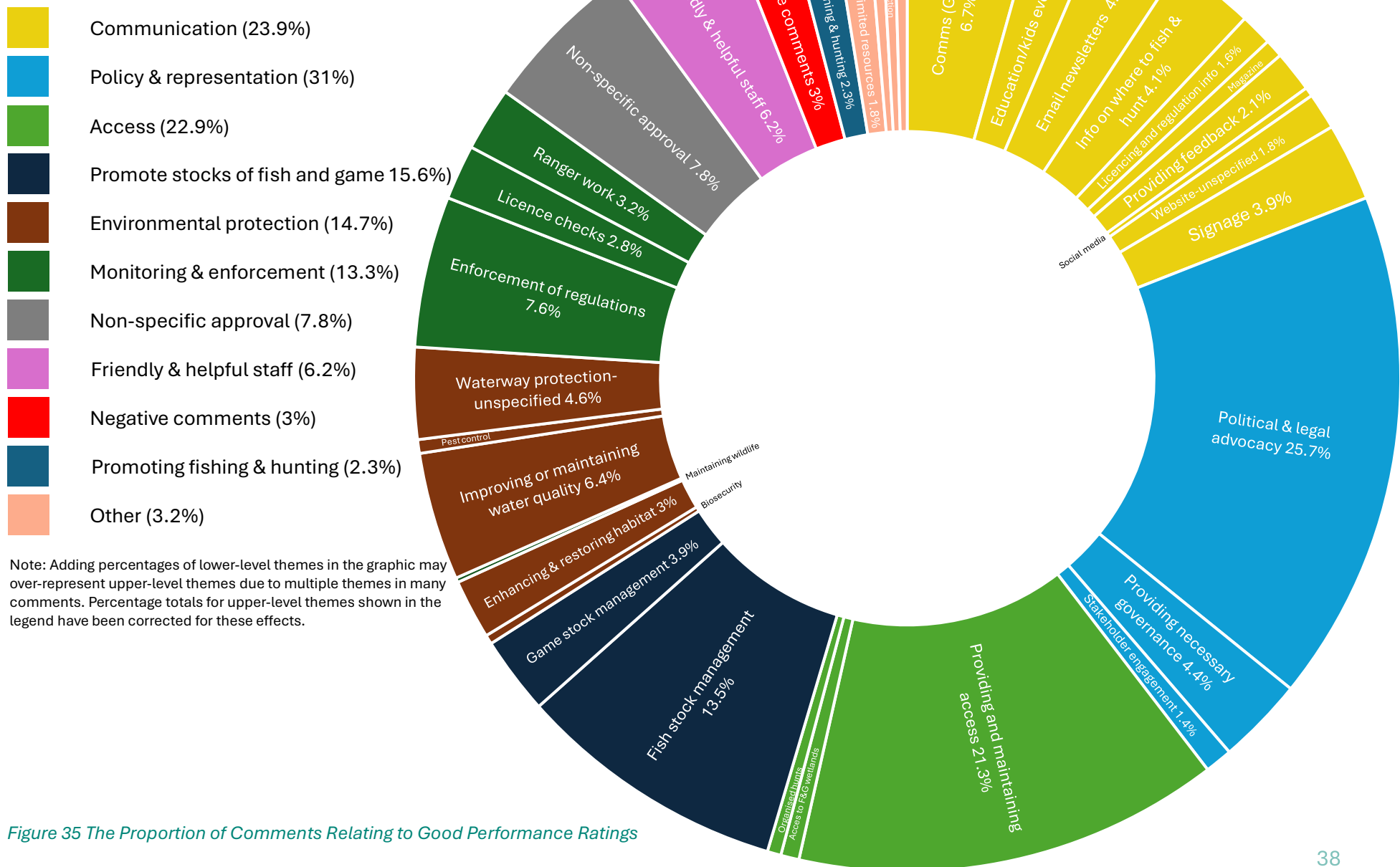


Figure 34 The Proportion of Comments Relating to Neutral Performance Ratings

5.5.1.4 Good ratings



There were several negative comments within the *Good* performance ratings and these are detailed in [Table 11](#).

Table 11 Sub-themes to Negative Comments from Those Giving F&G a Good Performance Rating

	Comment theme	Frequency
	More restocking required.	1
	Conflict with farmers.	2
	More Rangers needed.	1
	More spawning counts should be done.	1
	Better access maps required.	1
	Disagree with designated waters.	1
	Cost of licence is too high.	2
	More wetland development support needed.	1
	Need more done for game in general.	1
	Restrictive-rules-bag-season.	1
	Unnecessary projects or procurement.	1

6 Conclusions

1. Overall, anglers and hunters held the provision of Access to hunting and fishing locations as the highest priority for F&G, followed by *Ecology Monitoring* and *Fish Population Monitoring*. Except for *Conservation Orders* (electively removed as a choice), the results mirrored those for the top-5 in 2024. Two methodologies giving the same result provides confidence the measure is correct.
2. Those fishing are most likely to make access via public access points (other than Department of Conservation land). F&G negotiated access across private land is the second most utilised means of access.
3. Relationships with farmers likely mean more to those that only purchase a Game licence, as they mostly gain access by negotiating with a private landowner.
4. Signage is important to licence-holders. It was the most utilised F&G tool for finding access, with half finding it either very or extremely helpful.
5. Printed brochures and their electronic equivalents were equal second most used F&G access tool, supporting continuance of printed media.
6. Overall, blocked access has been a problem for one-in-five over the past 12 months, although this proportion varied across F&G regions.
7. Almost half felt their access had stayed the same over their time as a licence-holder, while one-in-five felt it had somewhat reduced, although perceptions varied across F&G region.
8. Access to fishing and/or hunting being limited by reduced mobility or a disability is a problem for one-in-fifteen, with flat access and vehicle access cited as the most common requirement. Two requests for a disabled access list were noted.
9. Tradition plays a more important role in choice of access location for those that only hunt game birds than for those that only fish.
10. There were high rates of uncertainty regarding F&G's performance advocating for access, which suggests more needs to be done to inform the F&G community about activity in this area.
11. Loyal Seniors are loyal. The most loyal purchasers of fishing licences were age 65+ and those under 35yrs had the highest rates of mixed licence tenure, mirroring 2024.
12. Perception of licence value-for-money had dropped for both licence types compared to 2024. Although both groups mostly felt their licence represented

good value, once again, 2025 Game Bird licence purchasers gave lower value ratings than those that purchased a 2024/25 Fishing licence.

13. As expected, many comments regarding how to improve licence value focussed on reducing its cost, improving stocks of fish and game, or relaxing regulations.
14. Most licence holders felt F&G does a good job, but the proportion has dropped compared to 2024 and is getting close to the 50% mark.
15. Those that offered good-rating comments most mentioned F&G representing them through political and legal advocacy, followed by F&G communications in their varying forms.
16. Based on analysis of respondent's comments, neutral performance ratings should be viewed as the mildest form of negative rating.
17. Based on analysis of comments, a third of those unsure of what performance rating to give F&G were withholding negative sentiment. Two thirds felt they did not know enough about F&G to comment.
18. Older licence-holders were less positive about F&G's performance compared to 2024 and younger licence-holders were more positive. There was much less uncertainty among younger age groups compared to 2024.
19. Concern over relationships with farmers/landowners was more prominent in 2025. *Conflict with farmers* was more than three times more prevalent in bad-ratings comments when compared to 2024, and almost twice as common among neutral-ratings comments.

7 Points to consider

1. F&G face a difficult prospect meeting the expectations of their community. Licence-holder's top priority is still delivery of access, which in many instances involves maintaining and improving landowner relationships. The second highest licence-holder priority is the ecological monitoring of rivers, lakes, and wetlands. While agriculture is not the sole contributor to water quality issues, many catchments still face challenges as farmers work to keep nutrients on-farm where they are most cost effective. This year, the proportion of 'bad' ratings comments regarding '*Conflict with farmers*' increased more than three-fold over results from 2024. At the same time, '*Issues with policy and representation*' were also up almost three-fold. No comments mentioning farming or agriculture were coded to *policy and representation*, however, comments often voiced concerns, over 'litigation' or 'court cases.' The substantial rise in sentiment across these two themes may offer at least some explanation for the year-on-year decrease in the median F&G performance rating.
2. '*Advocacy*' rated fourth out of the five priorities. F&G's advocacy role is not perceived as solely environmental. '*Good*' comments regarding advocacy this year seemed to have more comments pointing towards F&G's function to defend licence-holders rights to fish and hunt and represent them in the firearms policy sphere.
3. While only 47.4% of respondents said that they used F&G signage to find access points, 86% said it was at least somewhat helpful. It may be that 'location finding' occurred at home planning an outing and the signage served a supporting role indicating and confirming access when on site.
4. The rate of lapsed licence-holders in this survey is much less than the estimated 30%. This means the views of lapsed licence-holders are underrepresented.
5. The sample likely has an avidity bias. This is a self-selection bias in which the most avid recreational participants are overrepresented.

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