

West Coast Recreational Game Fishing; Industry Development Plan

August 2011

Prepared for: Development West Coast
Prepared by: Michelle Wright Consulting
Contact: mwrightconsultant@gmail.com

Contents

1	Introduction	6
	Project scope.....	6
	Objectives.....	6
	Project methodology and input	7
	Limitations.....	8
2	Overview of the sector.....	9
	Definition.....	9
	Recreational game fishing – what’s it all about?	9
3	Industry Development Plan.....	10
	PRIORITY 1 - Identify and understand the size, scope and value of the sector.	10
	Background	10
	Issues.....	12
	PRIORITY 2 - Addressing sector competitiveness	12
	Background	12
	Issues.....	13
	PRIORITY 3 - Supporting wider sector collaboration and sustainability	14
	Background	14
	Issues.....	15
	PRIORITY 4 - Addressing information provision, communication and promotion	16
	Background	16
	Issues.....	16
	Conclusion and recommendations	17
	References.....	18

Appendix A – Priority Action Plans.....	20
PRIORITY 1 – Identify and understand the size, scope and value of the sector.	20
PRIORITY 2 - Addressing sector competitiveness	21
Action	21
PRIORITY 3 - Supporting wider sector collaboration and sustainability	22
Action	22
PRIORITY 4 - Addressing information provision, communication and promotion	23
Action	23
Appendix B – Acknowledgements.....	25
Appendix C – Survey results (Fishers)	26
West Coast Recreational Game Fishing – Survey (Fishers)	26
Open ended feedback.....	43
Appendix D – Survey results (Tourism trade)	50
Open ended feedback.....	59

Abbreviations

BDC	Buller District Council
DWC	Development West Coast
GDC	Grey District Council
IGFA	International Game Fishing Association
MED	Ministry of Economic Development
MFish	Ministry of Fisheries (NZ)
NZRFC	New Zealand Recreational Fishing Council
NZSFC	New Zealand Sports Fishing Council
NZTE	New Zealand Trade and Enterprise
TIANZ	Tourism Industry Association of New Zealand
TSG	Tourism Strategy Group (within Ministry of Economic Development)
TWC	Tourism West Coast

Executive summary

This project was commissioned by Development West Coast in order to investigate and identify the critical factors relevant to the recreational game fishing industry on the West Coast. The key output from the project is the following report and industry development plan.

The project was funded by both Development West Coast and New Zealand Trade and Enterprise (NZTE) as part of their Regional Strategy Fund (year 3) with Development West Coast.

The project has been completed with the input from a variety of sources, including significant desktop analysis of previous research, data, relevant plans and case studies as well as wide ranging stakeholder interviews, surveys and one on one discussions.

This report draws attention to the fact that increased awareness of recreational game fishing on New Zealand's West Coast of the South Island has, at least in part, lead to notions of utilising this niche tourism sector as a means of contributing positively to the region's tourism product base and ultimately to regional development.

However, the sector lacks competitiveness in a range of areas that are not easily remedied and this places limitations on the extent to which this niche sector is contributing to tourism and wider development. Despite these constraints however, there is opportunity to strengthen the existing sector through improved collaboration, marketing and infrastructure services.

Through the development of this industry development plan, 4 key priority areas have been identified for attention over the next 1-5 years. These incorporate 1) identifying the size, scope and value of the sector 2) addressing sector competitiveness 3) supporting wider sector collaboration and sustainability and 4) addressing information provision, communication and promotion.

While there are many challenges not least the current economic environment and lack of current industry competitiveness, by focusing on these priority areas, the sector will be in a stronger position to achieve the objectives of attracting investment and sustainable growth of the sector as well as contributing to wider regional tourism development goals.

Furthermore, the report recommends that with support from much improved destination management and planning the sector has potential to help position the West Coast as a wider competitive fishing and hunting destination. The sector also has the potential to add value to any re-development of the existing port areas and help position these as attractions in their own right.

1 Introduction

This project has sought to investigate and identify the critical factors relevant to the development of an industry centred on recreational game fishing on the West Coast of New Zealand's South Island.

Recreational game fishing is a sector growing in popularity across both NZ and the world. The West Coast industry, although small, has received positive publicity in recent years due to record sized tuna catches and has been espoused as an increasingly valid contributor to the regions tourism industry.

However, although there have been numerous plans and strategies relating to tourism on the West Coast, there has not been any study of the recreational game fishing sector specifically. This report has sought to address this lack of knowledge and in doing so provide an industry development plan to assist in supporting this niche sector going forward.

The project has been made possible through funding received by New Zealand Trade and Enterprise (NZTE) as part of their Regional Strategy Fund (year 3) with Development West Coast. Michelle Wright was contracted by Development West Coast to undertake the project part-time over a 7 month period between November 2010 and June 2011.

The key audience of the report includes Development West Coast (DWC), New Zealand Trade and Enterprise (NZTE), Tourism West Coast (TWC), local district councils, key stakeholders specific to the sector and potential investors.

Project scope

The study area refers to the large West Coast region of the South Island, an area with a population of approximately 32000 residents across the 3 districts of Buller, Grey and Westland. From a marine fisheries perspective the region fits within the Challenger Fisheries zone.

Objectives

The key output of this project is an industry development plan which seeks to;

1. Identify the key barriers and challenges to the sport on the West Coast
2. Inform key stakeholders and potential investors of opportunities that will assist with industry development of the sector.
3. Put forth recommendations for support and management of the sector

Project methodology and input

The approach adopted in this report reflects the wide range of factors that influence the sector and the lack of information currently available. As such a mixed method exploratory approach was used, combining both qualitative and quantitative research methods.

Analysis of existing research. The focus of this initial analysis was to ascertain the size, scope and key factors affecting the recreational game fishing sector globally, within NZ and on a regional level. This was used to guide the initial focus of the project research.

Comprehensive data and document scan. Due to the nature of the sector and its influence by many wider factors, the scan covered a wide range of data from visitor statistics through to regional development strategies and fisheries policies. The scan also included 2 reports commissioned by the consultant from MFish and FINNZ (providing specific data not otherwise published).

Stakeholder interviews and correspondence. Initial conversations with key stakeholders was undertaken to guide the study. After which subsequent and secondary communication was also held to further expand and clarify findings throughout the project.

Two short surveys. Both a tourism trade survey and a survey of recreational game fishers were undertaken to ascertain a snapshot picture of the awareness and opinions of the sector as they relate to the West Coast sector. A total of 136 respondents completed the surveys.

Case study/competitor analysis. Throughout the study, a number of recreational game fishing regions were looked at from both within NZ and across the globe. This was undertaken to ascertain key common factors and indicators that influence the competitiveness of the sector.

Strategies and plans considered

Tourism on the West Coast and game fishing in particular, are influenced by wide ranging regional and national plans or policies. As such, this report considered a number of these existing documents and took these into account in developing the industry development plan.

Going forward, the industry development plan must be considered in the wider context of these existing plans (or their replacements) of the following agencies and adjustments made where necessary to remain compatible.

Agency	Plans/Strategies
Development West Coast	Industry and economic development plans and initiatives
Tourism West Coast	Tourism strategy and marketing plans
West Coast Regional and District Councils	LTCCP and 2011-12 Annual plans Tourism plans Visioning and town planning documents Port development plans and policies
Ministry of Economic Development	Tourism 2015 strategy International Visitor Survey Commercial Accommodation Monitor
Maritime New Zealand	Current legislation and regulations
Ministry of Fisheries	Fisheries 2030- vision, result areas and action plan
NZ Sports Fishing Council	Strategy and policy discussions

Limitations

Caution should be exercised when interpreting results from a relatively small sample size, nevertheless the responses expressed in the two online surveys are consistent with the views expressed from the wider stakeholder interviews and industry literature.

Both the design and analysis of the research and data available has relied upon the consultant's subjective interpretation, which is influenced by a range of factors. As such, the findings and subsequent suggestions put forth in this report are not the only perspective that can be concluded.

2 Overview of the sector

Definition

For the purposes of this report recreational game fishing is defined as any offshore fishing activity, which is not industrial or subsistence, undertaken primarily to capture large pelagic species for recreation, food or tag and release. This includes charter operators, private fishers and game fishing clubs.

Recreational game fishing – what’s it all about?

Recreational fishing in general is an enormously attractive activity and steadily growing in popularity in many parts of the world. Recreational game fishing (or sports fishing as it is also referred) is a smaller sub-group of this wider recreational fishing sector. For the purpose of this report, game fishing is limited to the marine/offshore variety, although the term can often be used interchangeably with freshwater game (sports) fisheries.

Fishing tourism specifically, is a defined market ‘targeting and serving’ this sector. Fishing tourism in general can also be considered part of a number of defined market segments including consumptive wildlife tourism, as well as eco/nature based tourism and marine tourism. The most common and established recreational game fishing destinations in N. Z. are located in the far north and north east coast of the north island around the Bay of Islands, Coromandel and Bay of Plenty, primarily due to favourable weather, access and variety of fisheries. However, the South Island also has some attractive recreational game fishing regions including Marlborough Sounds, Golden Bay, Kaikoura, Southland and Fiordland.

Game fishing on the West Coast is a relatively new recreational fishery (only becoming well known in the past 5-6 years). It is based primarily around the catch of highly esteemed ‘trophy’ tuna (both the Southern Bluefin and Pacific) found along a region known as the Hokitika trench between July and September each year. It is here that a number of large international commercial factory trawlers work the trench in search of Hoki, processing their catch at sea with the waste attracting and concentrating the tuna for anglers.

Access to this game fishery, is limited to those with craft able to reach this fishing zone along the Hokitika trench, and is highly weather dependent. As such the recreational game fishing sector on the West Coast is currently quite limited. However, potential may exist in expanding upon the game fishing season and locations, through the targeting of other species, such as Broadbill, sharks and albacore.

3 Industry Development Plan

PRIORITY 1 - Identify and understand the size, scope and value of the sector.

Background

The recreational game fishing sector, as with the wider tourism industry on the West Coast, faces many challenges from recent events, not least the global economic climate.

Tourism has traditionally been a strong contributor to the West Coast regional economy with just under 1.2 million guest nights in the year ending February 2011. However, despite recreational game fishing operating within the wider tourism sector, there has been limited research or data collected on the size and scope of New Zealand's recreational game fishing sector to date, particularly as it pertains to the West Coast. As such, it is difficult to quantify the net benefits of the sector to the region.

Popularity of the sector

The majority of the available data and literature broadly refers to the sector within the context of the wider fishing sector (i.e. both commercial fishing as well as other recreational fishing activities) or in a wider maritime/coastal tourism context. In the New Zealand context, there is little data available on the size and scope of recreational game fishing specifically; however, recent (2007/8) SPARC research on recreational fishing (in general) found the following:

- *Over 12 months (2007/8), 19.5 per cent of all New Zealand adults aged 16 years and over (633,768 people) had participated in fishing at least once. Whilst 16.6 per cent had participated in marine/saltwater fishing specifically.*
- *Marine/ saltwater fishing also had the seventh highest participation rate among various sport and recreation activities. This was higher than freshwater fishing which was ranked 21st (equal with rugby union).*
- *The majority of recreational fishers are men at 74.5 per cent and are mostly aged over 35 years.*

Although this data is not ideal to base judgement on the size of the game fishing sector specifically, it does highlight the level of participation in the wider sport. Also when considered alongside other data, one can start to ascertain some insight into the size and potential of the sector. The New Zealand Sports Fishing Council (NZSFC), for example, represents some 57 affiliated clubs (and their associated members) from around New Zealand.

From a New Zealand tourism perspective, again little data is available; however, the International Visitor Survey (IVS) which records activities undertaken by international visitors whilst in NZ provides some insights. For the year ending December 2010, just over 71000 visitors indicated that they participated in some form of sea or coastal fishing. Whilst just over 2500 visitors indicated that they participated in game fishing. Caution must be taken into account when interpreting these statistics as definitions of each activity can be quite subjective. However, again, it does provide some insights of the possible interest level in the sector.

Number of vessels

In regards to size of the recreational charter sector, anecdotal estimates indicate that on any given day (weather permitting) during the 6-8 week tuna fishing season between July and September, there are an average of 10-15 recreational vessels out chasing the tuna. Of which, approximately 1/3rd are charter operators and 2/3rd private-amateur fishers, (estimate only).

In acknowledgement by the Ministry of Fisheries to the fact that there has traditionally been very limited accurate information available on the size and distribution of the recreational charter vessel fleet, or its activity and catch a new policy was implemented in October 2010 by the Ministry of Fisheries. This required the registration of all charter vessels engaged in recreational charter fishing operations and the reporting of their fishing activity on a monthly basis.

As of April 2011 the number of registered amateur charter vessel operators in NZ was 183. These operators have registered a total of 203 different vessels. However, none of these are currently registered as based off the West Coast. However until a full year of data has been recorded, MFish are not in a position to provide more accurate information.

Furthermore, the current registration scheme does not include private recreational amateur fishers. Unlike the inland fishing sector which is monitored and controlled by licencing issued by Fish and Game, recreational marine game fishing does not require any such fishing licence requirements and as such there is no formal record kept of the number of amateur recreational game fishers operating off the West Coast.

In addition to this, utilising port usage data is not an accurate reflection of the size of the sector as it is a widely understood that a number of fishers visit the area from other regions and do not always utilise or 'report into' the local ports when doing so.

Finally, the recreational game fishing sector (both charter and private) tends to operate relatively independently. The main association representing the sector, NZ Sports Fishing, does not have a member club on the West Coast, which would ordinarily provide data through club records, membership and use-age.

As such, there is very limited information available on the size and scope of New Zealand's recreational game fishing sector, particularly as it pertains to those utilising West Coast.

Issues

As there has been no prior West Coast study of the sector to compare with or use as a baseline there is no starting point or recorded indicators to monitor the level of growth of the sector over time.

Without consistent and credible measures of the size, distribution and fishing habits of both the charter and private vessels in New Zealand it is difficult to ascertain and promote the true value and potential of the sector for the West Coast.

Furthermore, without formal networks or systems in place, there is limited means by which to administer and monitor such data long term.

PRIORITY 2 - Addressing sector competitiveness

Background

Currently the recreational game fishing sector on the West Coast is served primarily by ports in both Westport and Greymouth. However, both ports are underutilised by the sector with a number of vessels travelling to the West Coast from ports out of the region. This situation of course is not ideal. However it does present an opportunity if the region can address some of the elements that are currently not competitive with other regions.

The research identified a number of common elements that popular game fishing destinations have in common and these were used as key indicators to measure against for industry competitiveness. The key common factors having a positive influence on the success of a game fishing destination are as follows;

Infrastructure/services

- Accessible, safe and cost effective mooring facilities/slipways
- Wharf based fish weighing facilities (despite tag and release practices, 78 per cent of the fisher survey respondents stated that this was either 'sometimes or always important').
- Adequate and cost effective fish processing and storage facilities (73 per cent of fisher survey respondents indicated that this was either 'sometimes or always' important).
- Adequate vessel repair /engineering services

- Opportunity for socialising and meeting with other local and non-local fishing participants. Most of the fishing destination regions reviewed provided a wide range of social facilities and events (90 per cent of fisher respondents indicating that this was either 'sometimes or always' important).

Weather, environment and access

- Predictable weather and sea conditions. This has a direct influence on profitability, perceived quality and reputation, particularly if this causes delays.
- Diversity offered in the offshore marine environment. These include wildlife viewing, variety of fish and scenery.
- The potential for a record 'catch' provides a strong attraction for a destination.
- Being accessible is a key factor – not just good access to the region, but also to the actual game fishing area, particularly for the amateur fishers (i.e. with trailer boats). If the distance is too large or difficult to reach, a significant proportion of potential users (the market) will not visit.

Capability/profitability – for charter operations

- Strict controls over the quality and entry of charter operations. Competition from unregulated and non-compliant operators, are seen as a threat to the sector due to their influence on driving down profitability and sector reputation.
- Diversity. A long fishing season, range of fishing choices and/or diversity in operations allows for maximum return on invested capital and other resources.
- The legislative and governance context. This influences both viability and sustainability of the sector
- Price and value – Influenced by a range of factors, not least exchange rates, demand, fixed costs and competition.

Other

- Popular amateur fisher usage. The research indicates that this is often (although not always) the initial driver and key foundation of a strong game fishing destination, prior to or regardless of any charter or commercial fishing operations.
- A strong club, competition and event sector
- Strong industry collaboration (through clubs, associations and with the wider fishing community).
- A supportive community and tourism sector.

Issues

The comparative advantage of the West Coast game fishing sector is the attraction of catching record tuna, particularly the giant Bluefin. However, despite this advantage and the general respect and admiration for game fishing off the West Coast the sector is at a significant competitive disadvantage.

Furthermore, the key factors that provide this disadvantage are areas that are not easily rectified, if at all. These include the seasonal nature of the local game fishing sector together with challenging weather and sea conditions. The latter of which can dictate the notice for charter trips being as short as 24 hours and with weather windows lasting as short as 2-3 days.

Infrastructure and supporting service issues were expressed often in the interviews and surveys. Unfortunately, the sector is at the mercy of wider port development issues and has not been a priority for local authorities. However, herein lays another opportunity, if one is able to overcome the challenges of planning and funding.

To a certain extent the sector is finding innovative ways to work around these various challenges. Many charter operators for example, match expectation levels with honest promotion of the conditions and book trips into 5 day windows, to allow for unfavourable weather that may unfold. Many collaborate with and rely upon the infrastructure and services that exist to support the larger commercial fishing and cargo shipping sectors and they simply 'make do' for the short season. However, such conditions do little to position the West Coast as an ideal base to run a fishing tourism business and as such, they do not.

As well as these constraints, the lack of current diversification options realised and significant access and operational issues, particularly for many amateur fishers, provide additional limitations to how the sector can develop.

In addition to the above (or perhaps because of the above), the sector suffers from considerable economic leakages. This means that any flow on benefits that may be received from expenditure on goods and services from this niche sector in the West Coast communities are simply not yet being fully realised.

However, despite these constraints, the real opportunity and challenge for the West Coast is in developing the ability of the region to improve the net benefits received from the sector. It *can* do this through targeting its approach and doing this very effectively.

PRIORITY 3 - Supporting wider sector collaboration and sustainability

Background

A key requirement of this development plan by New Zealand Trade and Enterprise (NZTE) was to look at ways in which the West Coast sector could collaborate with the wider fishing industry. In addition to this, a key project outcome proposed by NZTE was to consider how the West Coast game fishing industry could potentially provide a benchmark for how the sector can be developed sustainably for the wider industry.

With these goals in mind, the research identified a number of factors influencing industry collaboration and sustainability.

In regards to environmental sustainability, the sector is at the mercy of much broader national and international fisheries policies. One such policy is the requirement to adhere to national catch limits for Southern Bluefin tuna in particular. MFish have a requirement to monitor certain fisheries, to ensure sustainable fish stocks and quotas are achieved and as such catch data is required from the sector. In New Zealand, this is achieved through implementing national catch limits via a Quota Management System established in 2004. However this was established prior to the development of the recreational game fishery off the West Coast.

As such to improve knowledge of this new sector MFish have undertaken a number of initiatives to monitor and manage catches off the West Coast. In general this has been a good example of sector collaboration in seeking to achieve mutual sustainability for the sector and fisheries. Even prior to mandatory catch reporting was in place, the sector voluntarily recorded the number and weight of blue fin anglers caught and landed between 2007 and 2010. In addition to this, the practice of tagging and releasing is promoted and encouraged by both MFish, NZSFC and supported by many of the recreational fishers.

Issues

The West Coast appears to have a reasonable amount of collaboration on an individual operator basis, both with other recreational fishers and the commercial sector when needed. The local fishing clubs for example often assist with weighing of tuna when requested. The New Zealand Sports Fishing Council (NZSFC) has worked hard in developing sustainable practices on behalf of the wider sector and it makes sense to liaise with this group in developing and improving practices on the West Coast. However, the fact that there are no NZSFC member clubs on the West Coast, effectively removes the West Coast from such opportunities for collaboration with the wider NZ sector (from competition and events through to important policy debates).

In regards to sustainable practices, the recreational fishers visiting the West Coast do, for the most part, operate within the relevant codes of practice put forth by MFish, Maritime NZ and their own industry. However, the introduction of mandatory recording of catch data was quite contentious when put forth, with some charter operators viewing the new process as invasive, cumbersome and an additional and unnecessary cost.

Furthermore, one of the findings that came out in the research was the cost associated with so much legislation and regulation, which often frustrated the fishing sector. So any improved practices going forward would benefit from being kept as simple as possible. Finally, in regards to operational sustainability, quality, safety and fixed costs appear to be the key factors affecting the viability of the sector going forward, particularly at this time of economic decline.

PRIORITY 4 - Addressing information provision, communication and promotion

Background

Regional tourism promotion is becoming an increasingly competitive arena in New Zealand, as such it is an advantage of the West Coast to have such a strong and recognised destination brand. Despite this, some of the associations with the brand are perhaps out dated and do not maximise the wider competitive offerings of the region, such as fishing tourism (in general).

Perhaps due to this lack of recognition of the sector, there has been no accurate collection of data on West Coast fishing tourism in general, let alone the new and niche game fishing sector.

Despite this lack of attention to fishing tourism, a snapshot survey of the domestic market undertaken by Tourism West Coast in January 2010 asked respondents what activities and attractions come to mind, when thinking of the West Coast. Almost 14 per cent of respondents chose fishing/hunting as one of the key attractions. This result may indicate reasonable awareness and attraction of the West Coast as a fishing destination (if not game fishing specifically) however it also provides much room for improvement. This is further supported by a survey of tourism trade for the purpose of this report, whereby 54 per cent of respondents stated that they were not aware of a recreational charter operations operating off the West Coast.

Issues

Recreational game fishing in particular appeals to a small well defined market segment; however, as indicated earlier in this report, there is a clear lack of accurate data on this segment as it pertains to the West Coast. This is not to say that, individual charter operators, who live and breathe the industry, do not know who their customers are. What it does mean is that as a region, the sector is not well understood and as such the full potential of this market segment is not yet fully realised.

Currently, most communication and promotion of the sector is undertaken by individual charter operators, utilising trade publications, websites and some print advertisements. The Tourism West Coast website includes some information on the sector but does not in any way utilise the sector to competitively position the destination.

The lack of tourism trade awareness also entails that the West Coast is missing out on opportunities that this distribution chain presents. Although, this often comes down to the willingness of operators to work with trade, it may also indicate a lack of understanding of the benefits of working with trade by operators. This lack of interaction with trade further isolates the sector from the wider tourism sector, which could provide mutual benefits to each other.

Conclusion and recommendations

This report provides an introduction or snapshot understanding into the recreational game fishing sector on the West Coast, in order to investigate and identify the critical factors relevant to the recreational game fishing industry on the West Coast.

In considering the factors relevant to the competitiveness of the wider game fishing sector it has been found that the West Coast sector lacks competitiveness in a number of areas, caused by wide ranging factors, not all easily resolved.

However, through implementing the actions recommended in this development plan the sector will be in a stronger position to achieve the objectives of attracting some investment and supporting sustainable growth, as well as contributing to wider regional tourism development goals.

The four key priority areas identified for attention over the next 1-5 years incorporate 1) identifying the size, scope and value of the sector 2) addressing sector competitiveness 3) supporting wider sector collaboration and sustainability and 4) addressing information provision, communication and promotion.

However, in light of the findings put forth in this paper, the outcomes sought are only *partially* achievable through supporting the game fishing sector alone. It is recommended that the best outcomes for the sector will be achieved through much improved and strategic destination management and planning. This should encompass an improved focus on positioning and promoting the West Coast as a wider fishing destination (game, beach, whitebait, trout etc.) within the context of wider tourism and potential port/wharf development opportunities, not simply in isolation.

References

AusIndustry (2006) *Tasmanian Sport Fishing Tourism Development and Marketing Plan (Phases 1 and 2)*.

Brooks, Charalambou, Coakes, Gabriel & Roberts, 2001, *The Right Bait- Social Contributions of Tourism Fishing Charter Operations to St Helens, Tasmania*, Bureau of Rural Sciences, Department of Agriculture, Fisheries and Forestry - Australia

Department of Primary Industries, Parks, Water and Environment (2010) *Recreational Sea Fishing Guide*. Tasmania.

Department of Primary Industries, Parks, Water and Environment (n.d.) *Fishing the Tasman Peninsula* (brochure). Tasmania.

Development West Coast (n.d.) *The West Coast Economic Development Strategy 2008-2013*

Ditton, B, Holland S and Anderson D (2002) *Recreational Fishing as Tourism*. American Fisheries Society.

Dixon H and Generosa G (2011) *West Coast Indicators 2010 BERL Economics*, BERL ref #5038 Wellington, NZ

Ernst and Young (2006) *Economic Impact of Recreational Fishing in Port Stephens and Narooma/Bermagui*. Report commissioned by the Australian Fishing Tackle Association (AFTA) and the Boating Industry Association (BIA)

Evaluation Consult (2011) *West Coast Tourism Major Regional Initiative; Outcomes Evaluation Report*. Prepared for West Coast Tourism Major Regional Initiative Steering Group (c/o Development West Coast). New Zealand

Galeano, D., Langenkamp, D., Levantis, C., Shafron, W. and Redmond, I. (2004) *Economic Value of Charter and Recreational Fishing in Australia's Eastern Tuna and Billfish Fishery*, ABARE eReport 04.10 Prepared for the Fisheries Resources Research Fund, Canberra

Gartside, D (2001) *Fishing Tourism: Charter Boat Fishing*. Cooperative Research Centre for Sustainable Tourism. Australia.

Greiner, R. and Patterson, L. (2007) *Towards sustainable management of recreational fishing in the Gulf of Carpentaria*. Report prepared for the Northern Gulf Resource Management Group. River Consulting, Townsville.

Lovelock, B.(ed.) (2008) *Tourism and the Consumption of Wildlife; Hunting, Fishing and Sport Fishing*, Routledge, UK

Ministry of Fisheries (2008) *Monitoring the recreational catch of Bluefin Record of meetings held in Auckland and Westport 12 and 25 August 2008*

Ministry of Fisheries (2010) *Challenger Fishery Management Area* (brochure). Ministry of Fisheries, Wellington, New Zealand.

Ministry of Fisheries (2010) Marine recreational fishing charter vessel registration and reporting; Final Advice Paper. Ministry of Fisheries, Wellington, New Zealand.

Ministry of Fisheries (2010) National Fisheries Plan for highly Migratory Fisheries. Ministry of Fisheries, Wellington, New Zealand.

Ministry of Fisheries (2011) Registration data of commercial charter fishing vessels to April 2011 (commissioned report).

New Zealand Sports Fishing (2010) New Zealand Sport Fishing; 5 Year Strategic Plan August 2010 – July 2015 (Draft)

New Zealand Sports Fishing (2011) Meeting minutes between NZSFC and NZFRC, 16 January 2011

New Zealand Tourism Research Institute (2009) Marine Tourism, Fisheries and Community: Creating Barometers of Economic Change. Report commissioned for Ministry of Fisheries, New Zealand.

Northland Marine Development Group (2008) International Visiting Yachties Survey; Whangarei and Opura May 2008.

Price Waterhouse Coopers (2008) Fisheries 2030 – Vision, result areas and action plan. Ministry of Fisheries, Wellington, New Zealand.

Recfish Australia (2008) Survey of recreational fishing activities in Commonwealth Waters p49 – 59 Recreational fishing in Commonwealth Waters: a preliminary assessment. Recfish Australia

Recfish Australia (2008) Recfish Australia Annual report 2007-08. Recfish Australia

Recreational Fishing Advisory Committee (2010) Recreational Fishing in Australia - 2010 and Beyond. Discussion Paper commissioned by the Minister for Agriculture, Fisheries and Forestry, ACT, Australia

Sport and Recreation New Zealand (2009). Sport and Recreation Profile: Fishing – Findings from the 2007/08 Active NZ Survey. Wellington: SPARC

The Allen Consulting Group (2004) The Economic Contributions of Australia’s Marine Industries. Melbourne, Victoria, Australia

The South Australian Centre for Economic Studies (1999) The Value of New Zealand Recreational Fishing. Report commissioned for New Zealand Ministry of Fisheries.

Tourism West Coast (2009) Tourism Strategy 2010 – 2013

Tourism West Coast (2010) West Coast Perceptions; Tourism Research report.

Appendix A – Priority Action Plans

PRIORITY 1 – Identify and understand the size, scope and value of the sector.		
Action	Probable participants	Preferred Timing
Review the Fish vessel registration data records once a full year of data has been recorded	Action group/DWC/TWC/Local Port authorities/councils	In preparation for 2012 season
Establish baseline market indicators of the sector to compare and measure against going forward (as outlined in priority 4 below).	Action group/DWC/TWC	In preparation for 2012 season
Delegate the recording and monitoring of this data to a relevant body	DWC	2011-12
Undertake further research to quantify the true socio-economic contribution of the recreational game fishing sector on the West Coast.	DWC/TWC	2011-12
Expand upon this research to quantify the true socio-economic contribution of ALL recreational fishing activities on the West Coast.	DWC/TWC	2011-12

PRIORITY 2 - Addressing sector competitiveness		
Action	Probable participants	Preferred Timing
Identify and deliver new and improved supporting infrastructure (short term) to immediately address the quality and safety reputation of the sector	BDC/GDC/DWC	Immediate
Address the wider opportunities to reduce the barriers and constraints to operating off the West Coast (fixed costs, access, maintenance, processing, berthage)	BDC/GDC/DWC	Immediate
Identify and prioritise private sector opportunities to add value to the sector through the provision of key supporting services (social facilities, activities)	BDC/GDC/DWC	2011-12
Engage the sector to develop partnership opportunities on the West Coast to make the most of the 'poor weather windows' when fishing is not possible	TWC/Local operators/service providers	Immediate, in preparation for 2012 season
Maximise the participation in the current short season, through opportunities available through existing sports fishing networks (e.g. events/competitions)	Operators/Fishers	2012
Overcome the challenge of a short season and better utilisation of existing capital through encouraging and supporting diversification. <ul style="list-style-type: none"> • other game fishing options • wildlife viewing (e.g. Hector dolphins, seabirds) 	Operators/Fishers/TWC/DWC	2011-12
Advocate for improved recognition of the role and value of recreational fishing within the local communities, to ensure that provision for the sector is a requirement of <i>all future development plans</i> .	BDC/GDC/DWC/TWC	2011-12
Maximise opportunities to leverage off the existence of the commercial fishing fleets, alongside the recreational, to strength the positioning of the West Coast as a fishing region; e.g. providing improved viewing areas for visitors to watch the fleets come and go.	BDC/GDC/DWC/TWC	2012-14 (as per broader Port planning)
Develop financially sustainable ports that will provide shared infrastructure to the benefit of the game fishing sector; Consider the development of wider waterfront development plans to utilise mixed use opportunities based on current resources and heritage of the ports.	BDC/GDC/DWC	2012- 14 (Long term)

PRIORITY 3 - Supporting wider sector collaboration and sustainability

Action	Probable participants	Preferred Timing
Suggest/support the establishment of a West Coast game fishing action group/network to strengthen collaboration	Local Fishers/Fishing operators/NZSFC	2011
Improve the participation, consultation and communication processes between the sector (utilising the new group suggested above), the wider tourism industry and other stakeholders	Local Fishers/Fishing operators and /or new appointed Action Group/TWC	2011 –before 2012 season
Improve West Coast participation in and representation on national sector issues through supporting /sponsoring West Coast membership of the NZ Sports Fishing Council (NZSFC)	Action Group /NZSFC/DWC	2011-2012
Prioritise and address issues relating to safety and quality of the sector (real or perceived) through industry codes of practice.	Action Group	Immediate
Address any sensitive issues and perceptions around game fishing sustainability and practices. <ul style="list-style-type: none"> Establish 'sector' fact sheets and have these available for distribution. Ensure key points are communicated effectively in any promotional material and messaging. 	Action Group /Local Fishers/Fishing operators/TWC	2011-14 (as per strategic planning processes)
Harness and value the wealth of knowledge and anecdotal information held by the sector (both commercial and recreational) to develop sustainable <i>yet workable</i> decisions going forward – operationally and in marketing.	Action Group /other local Fishers/Fishing operators/TWC/DWC	Immediate
Encourage the sector to support the goals of the NZSFC on sustainability practices as outlined in their strategic plan (which has been undertaken in consultation with industry and MFish).	Action group/ Fishing operators	Immediate
Support and promote the current sustainable practices already established by the sector (e.g. 1 tuna/boat, the rest tag and release) and those advised as they arise. Extend this to recreational fishers.	Local Fishers/Fishing operators	2011-12
In conjunction with wider industry good practice, consider piloting the development of a 'Responsible fishing scheme' for all recreational fishers operating in the West Coast/Challenger area, to lead NZ with best practice in sustainability and industry collaboration.	Local Fishers/Fishing operators	2012

PRIORITY 4 - Addressing information provision, communication and promotion		
Action	Probable participants	Preferred Timing
Establish a MoU between the new fishing tourism action group and TWC to establish responsibilities and priorities for marketing and promotion of the sector. (These priorities to be detailed in a designated marketing and communications plan).	Industry sector / TWC	Immediate
Establish funding for this group to undertake sector research and support communication and promotional activities (e.g. brochures/fact sheets/signage).	Action group/TWC	Immediate
Undertake a targeted survey of game fishing/all fishing visitors & users to ascertain market data, including expectations, needs and satisfaction levels	Action group/TWC	2011 or 2012 Tuna season
From this research, establish baseline data. Monitor and report on this data annually.	Action group/TWC	2011-12
Assist with industry development focusing on improving market readiness and capability with tourism trade (packages/pricing/distribution etc.)	TWC	2011-12
Improve communication and collaboration with the wider NZ sports fishing sector (e.g. Through 'membership' of West Coast clubs with NZSFC).	Action group	2011-12
Develop a marketing and communications plan to improve awareness and position the West Coast as a 'must do' fishing (and possibly hunting) destination (i.e. not just sports fishing).	Action group/TWC	2011-12

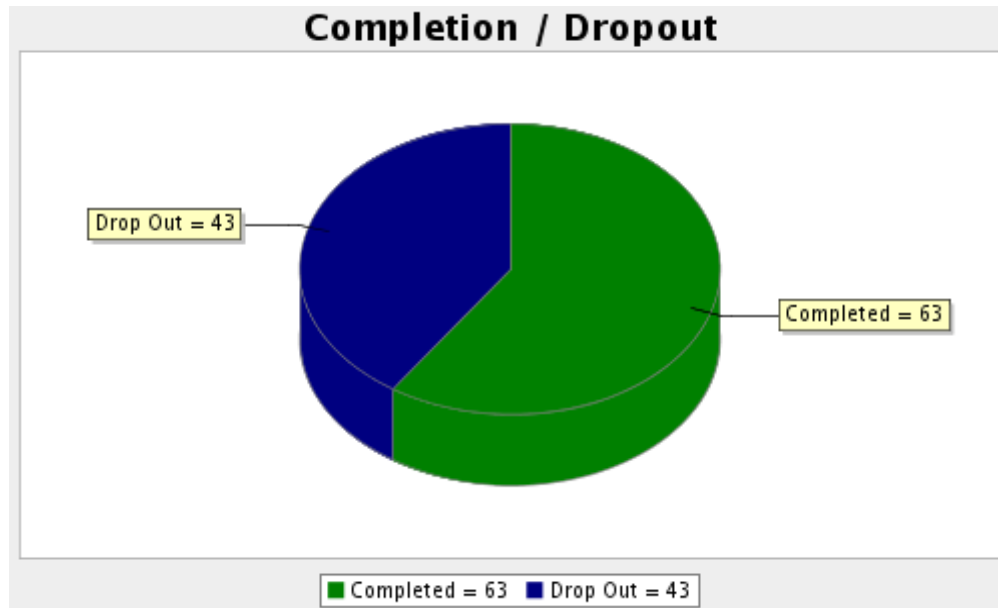
<p>Implement the new plan, ensuring as a priority:</p> <ul style="list-style-type: none"> • The plan is aligned and collaborated with all key stakeholders to ensure consistency in messaging and goals. • Key target markets are identified and campaigns aligned accordingly, in conjunction with wider TWC campaigns and across all available mediums (print/online/trade etc.). 	Action group/TWC	2012- 2014 (As per regional strategic communication campaigns)
<p>Consider how the West Coast can best partner with the wider network of NZ and global sports fishing activities (e.g. events/competitions).</p>	Action group/TWC	2012-14
<p>Consider how the commercial fishing sector & 'fleets' can be utilised in the visitor experience and promotional messages so as to strengthen this new positioning.</p>	TWC	2011-12
<p>Encourage better positioning and promotion of the NZ sector in general</p>	TWC/Tourism New Zealand	2011-12

Appendix B - Acknowledgements

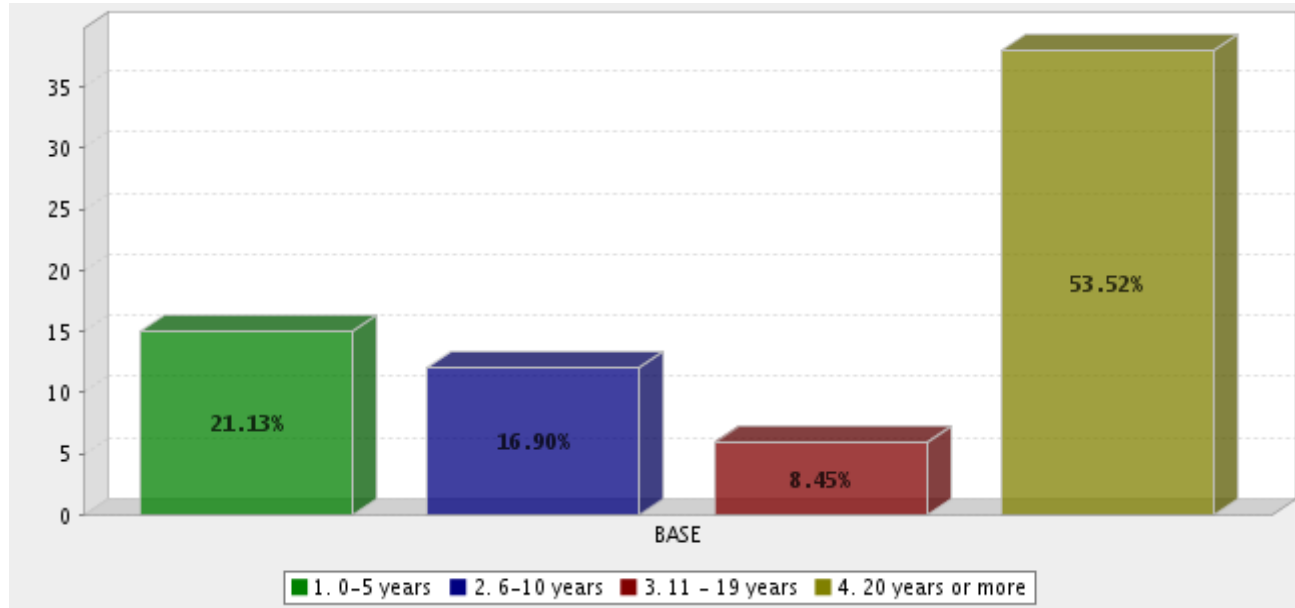
Name	Position & organisation
Phillip Barnett	Chair, Tourism West Coast (RTO) and Owner/Operator, West Coast Travel Centre
Mark Connor	Vice President and South Island Rep, NZ Sports Fishing Council
Anita Gillespie	Trade Marketing Executive, Tourism West Coast
Tim Grubb	Research Analyst, Tourism, Strategy Group, Ministry of Economic Development
Stephanie Hill	Senior Fisheries Analyst ,Ministry of Fisheries
John Holdsworth	Director, Blue Water Marine Research
Leigh Kelly	Owner/operator, Wildcat Charters
Dr Brent Lovelock	Senior Lecturer, Dept. of Tourism and Co-Director, Centre for Recreation Research, University of Otago
Craig Loveridge	Senior Data Analyst, Ministry of Fisheries
Roz Nelson	Secretary, NZ Sports Fishing Council
Paul Pretorius	CEO and Acting Port Manager, Grey District Council
Captain John Taylor	Harbourmaster/Port Manager, Westport
Ivan Wilson	Greymouth Fishing Club
Dave Woof	Owner/operator, Cerveza Charters

Appendix C – Survey results (Fishers)

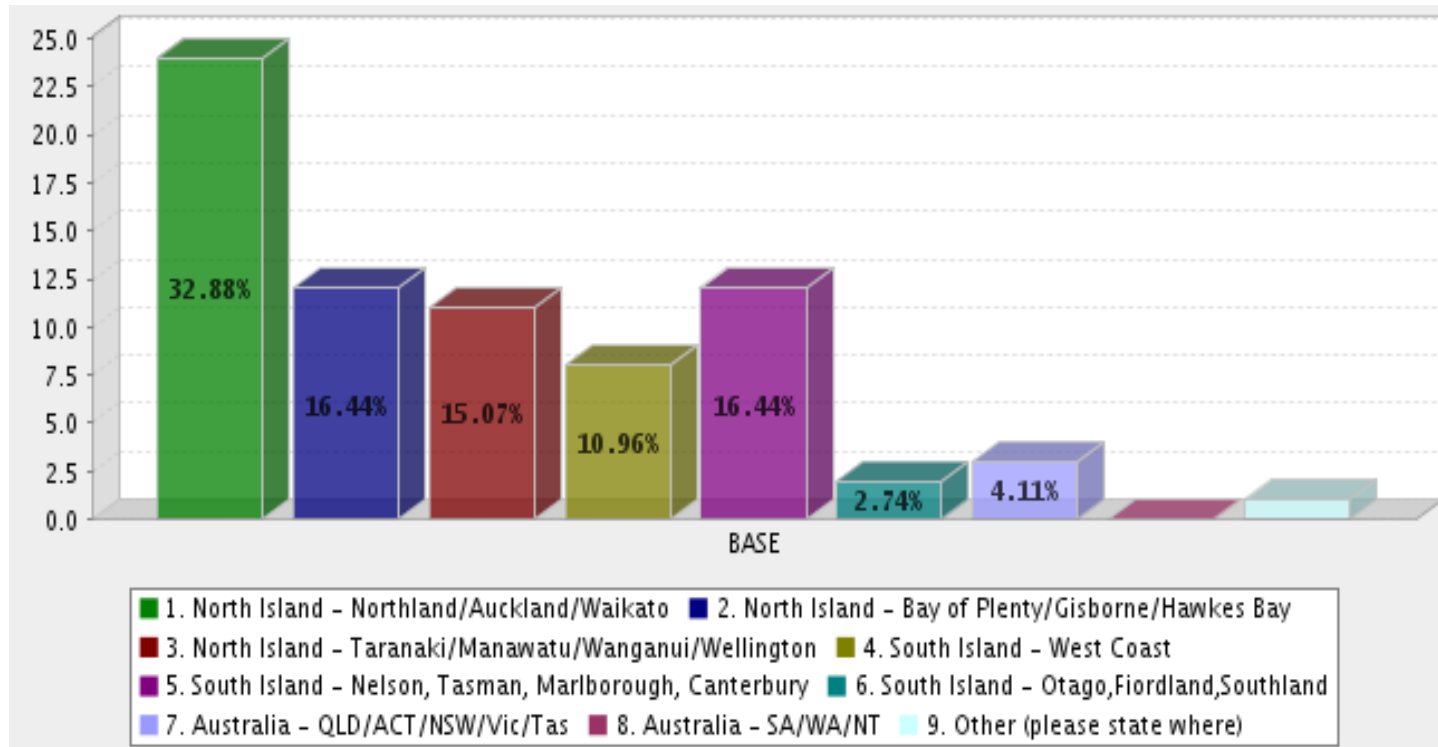
West Coast Recreational Game Fishing – Survey (Fishers)



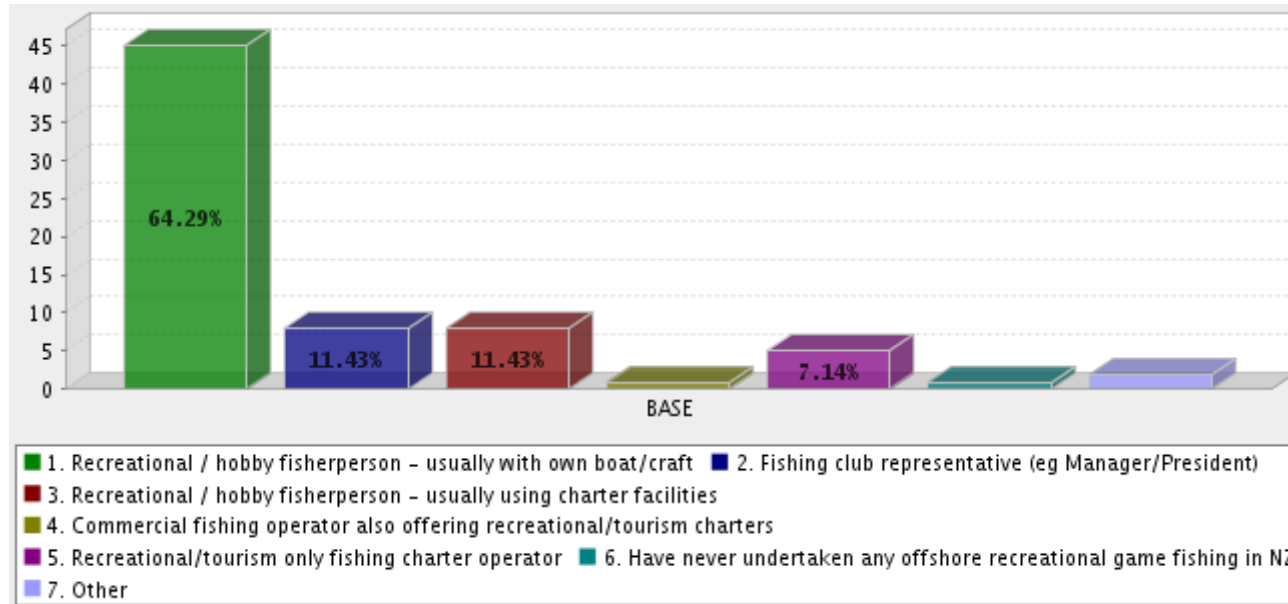
How many years have you enjoyed any type of offshore fishing (commercial and/or recreational private or charter)?



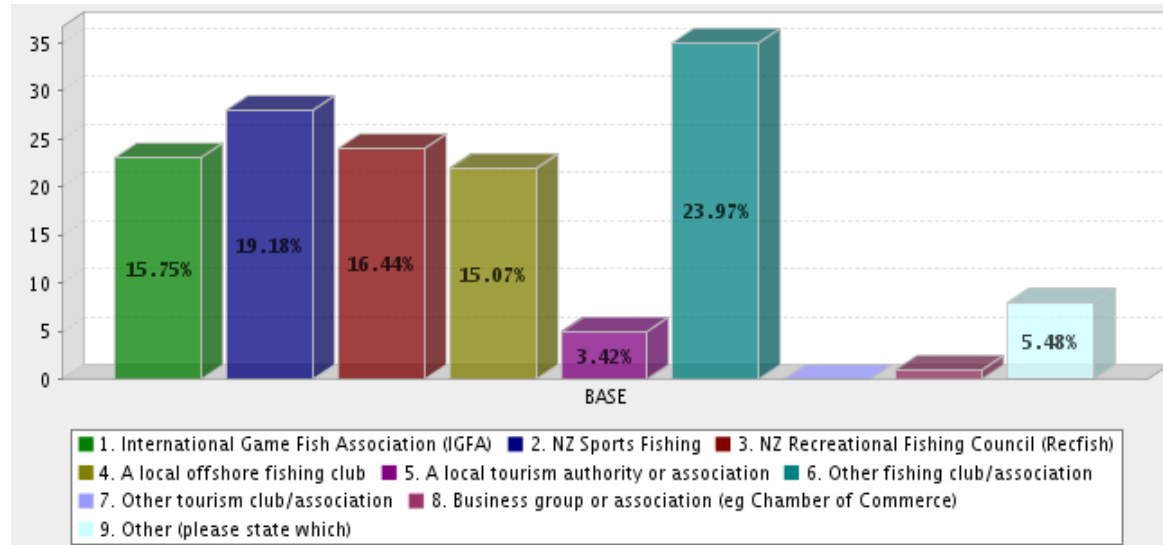
Where are you or your operation usually based?



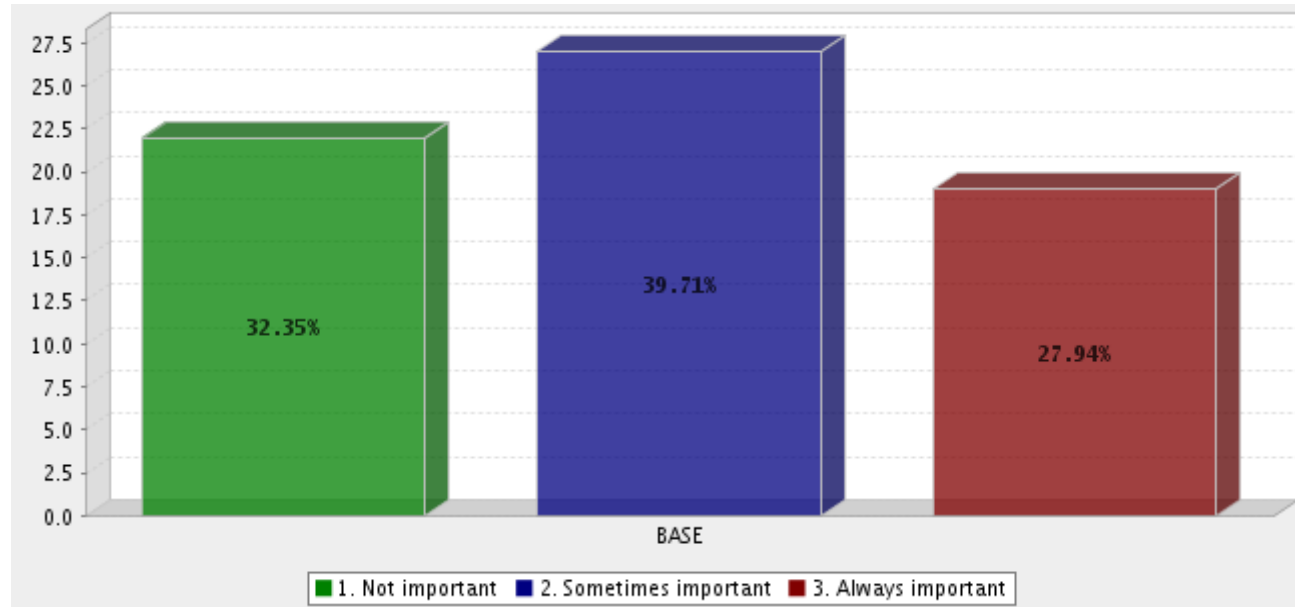
*In regards to your NZ recreational offshore sports/game fishing experiences.
Which best describes you/your operation?*



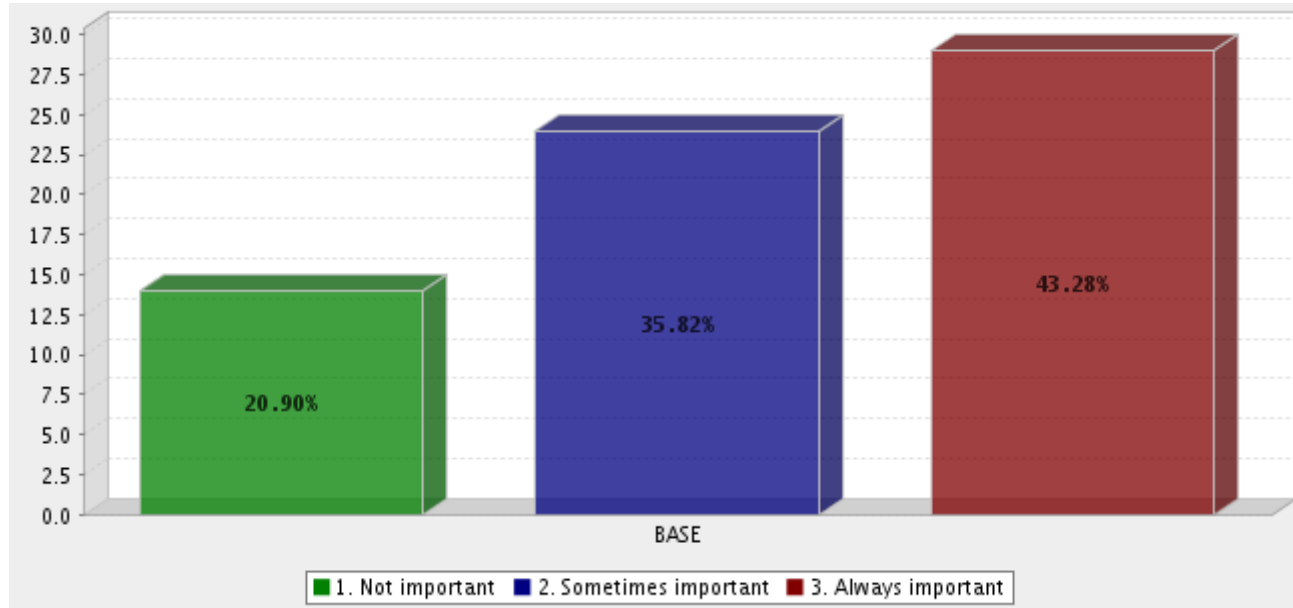
I am a current member, active supporter or contributor of the following clubs, associations or networks (choose all that apply).



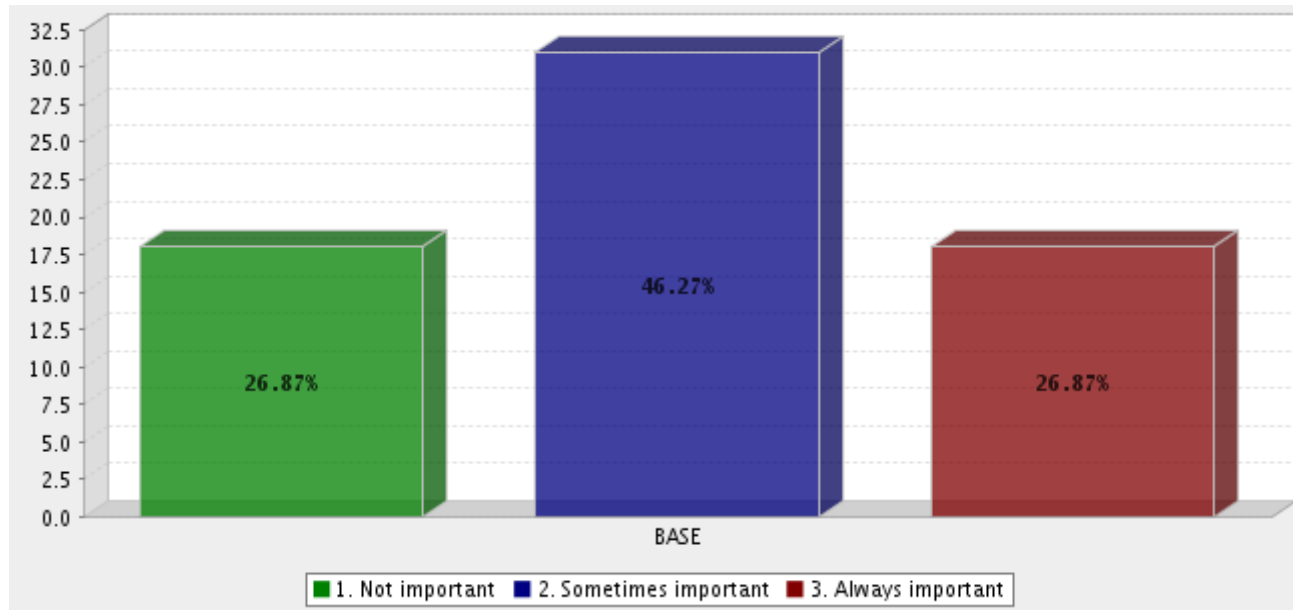
*Please rate the importance to you of the following to the enjoyment of your game fishing sport;
Participation in offshore fishing competitions*



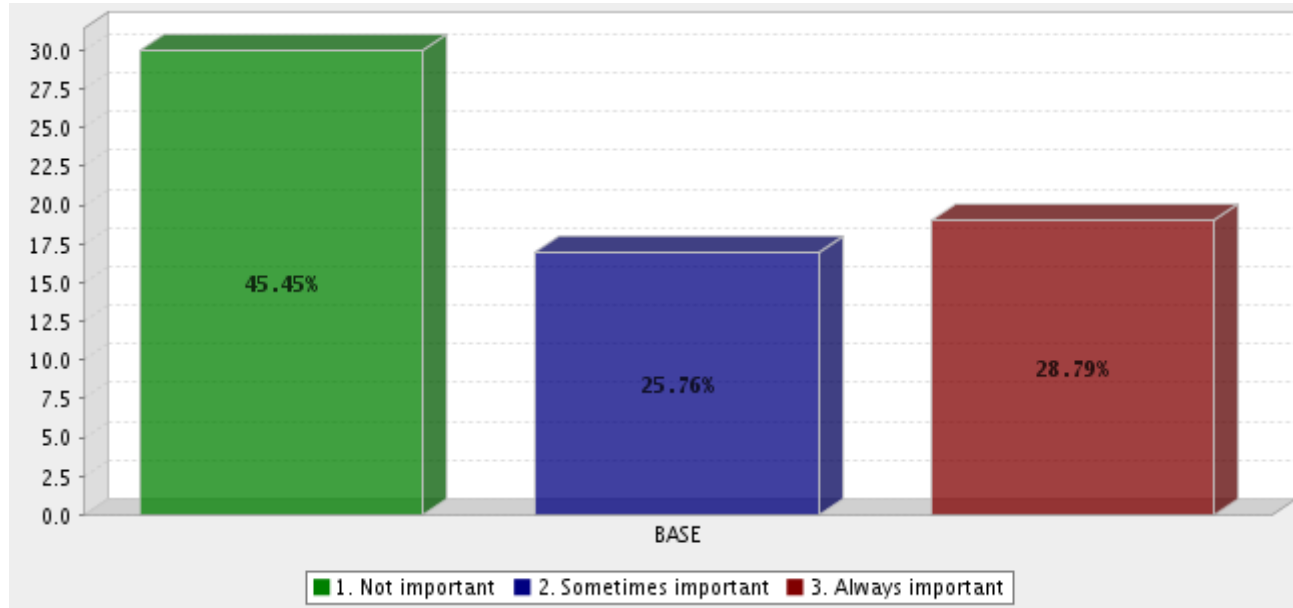
The availability of wharf based weighing facilities



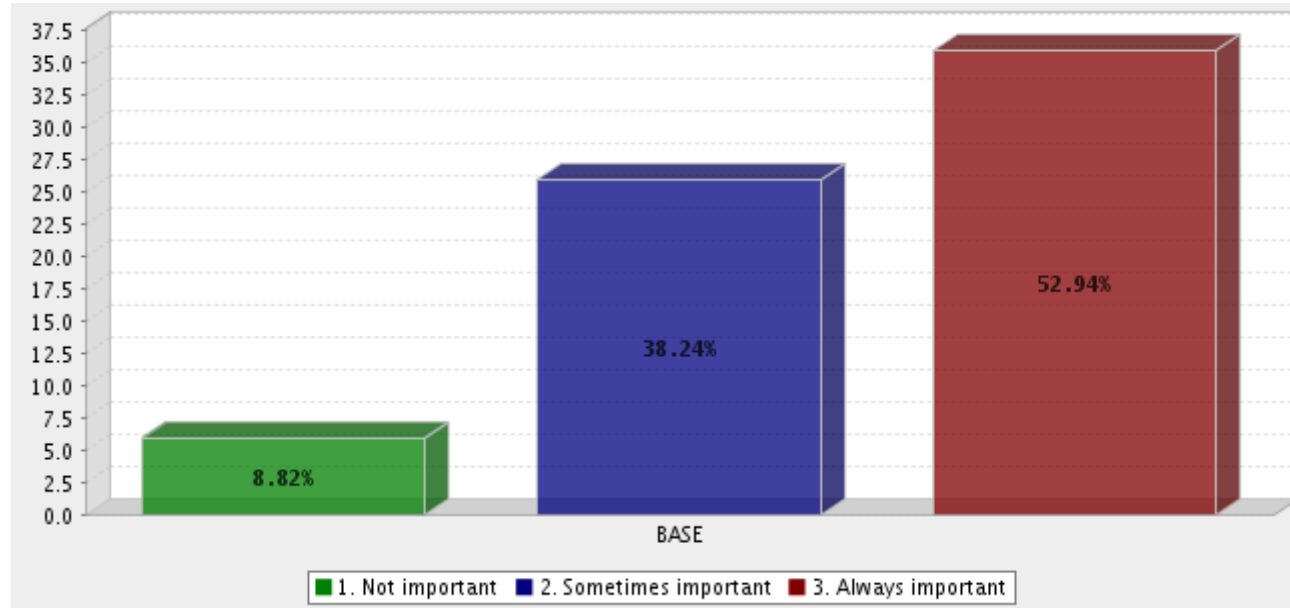
The availability of wharf or destination based fish processing and storage facilities



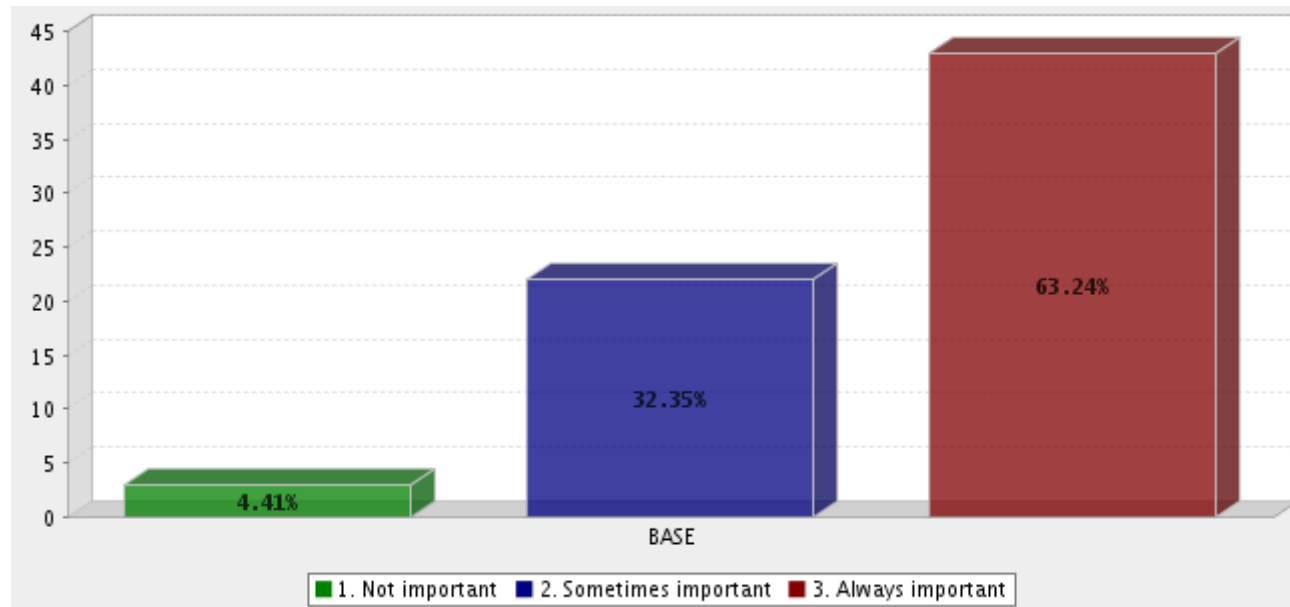
Tourism/recreation activities within walking distance of the wharf/harbour



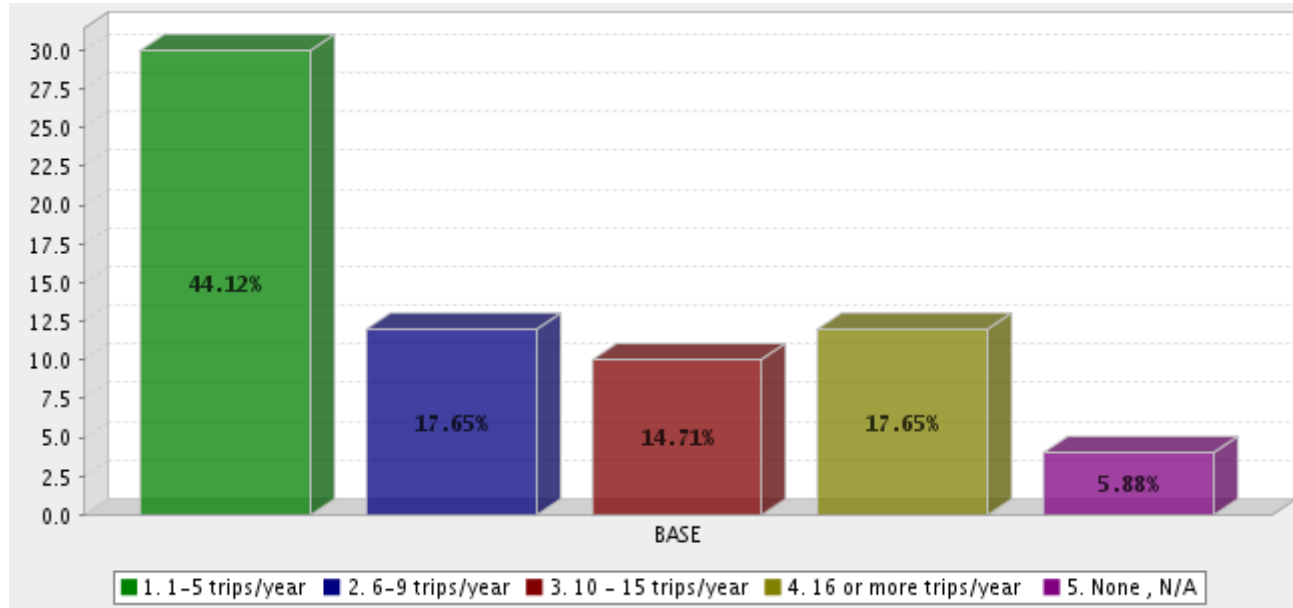
Meeting and socialising with other local and non-local fishing participants



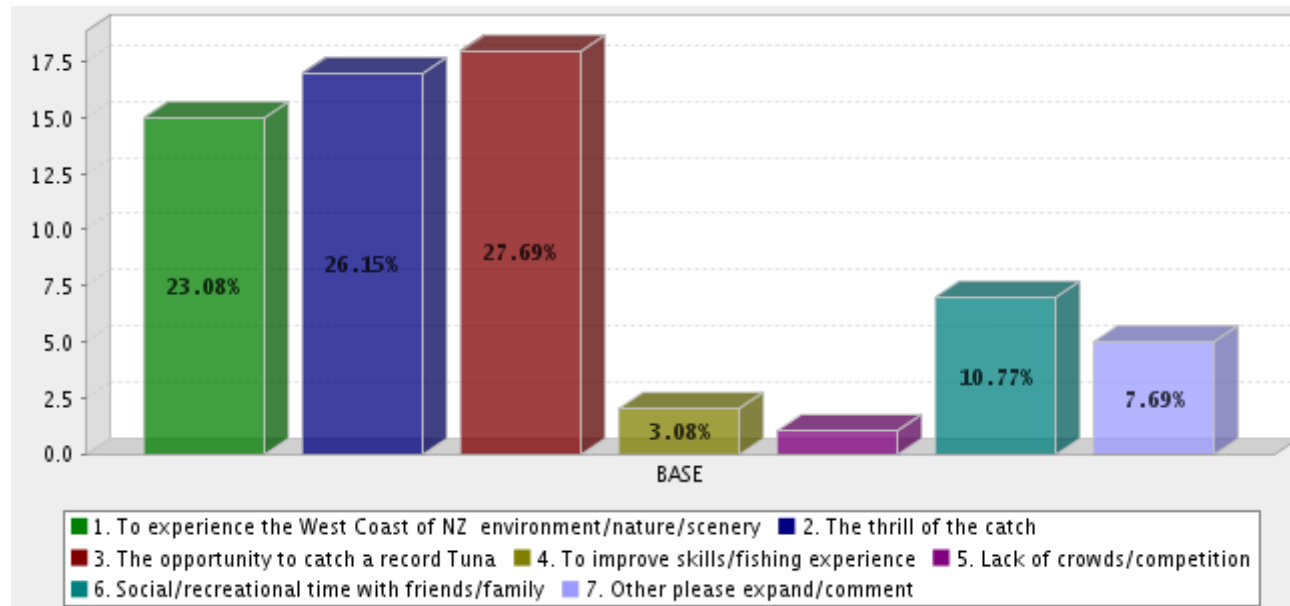
Up-to-date web/internet based destination fishing information (tides, fishing trends/stats, facilities, supporting services, booking options).



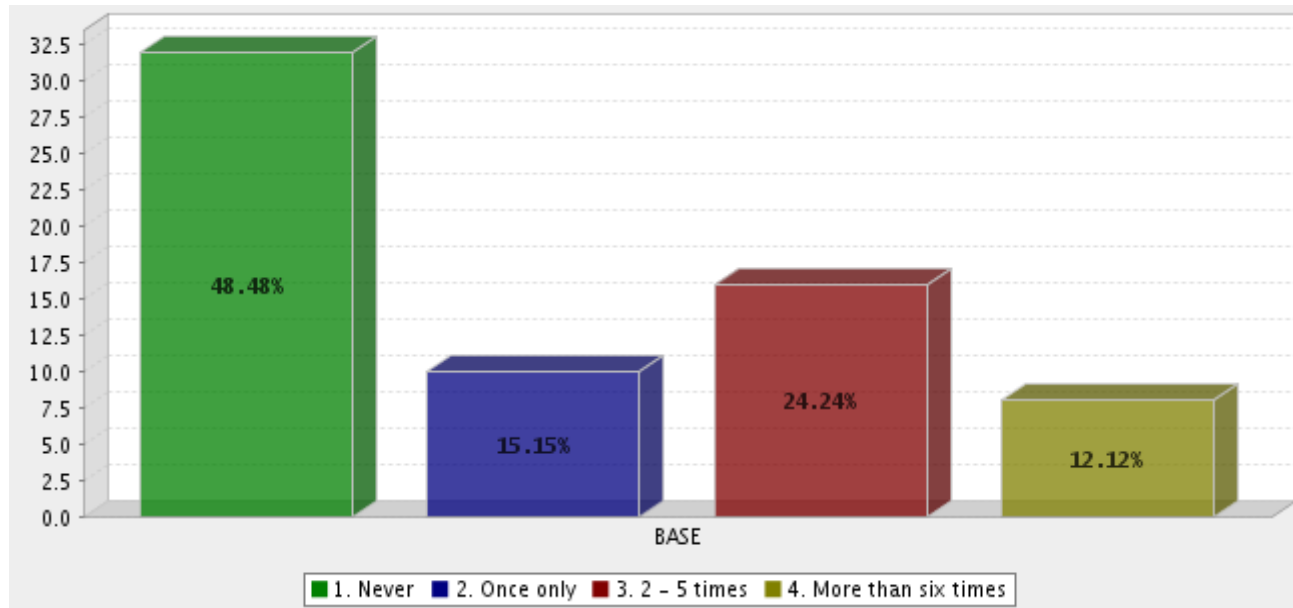
How many ocean based game/sports-fishing trips do you usually participate in each year?



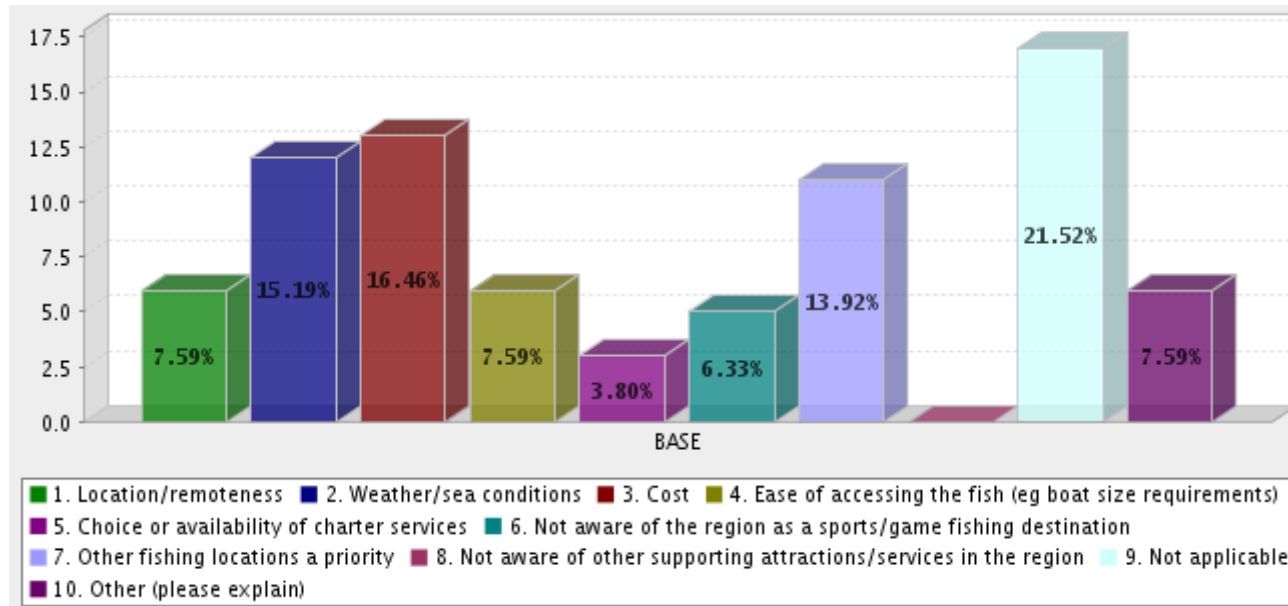
Regardless of whether you have game fished off the West Coast of NZ or not. In your opinion, what are the main attractions to game fish off the West Coast of NZ?



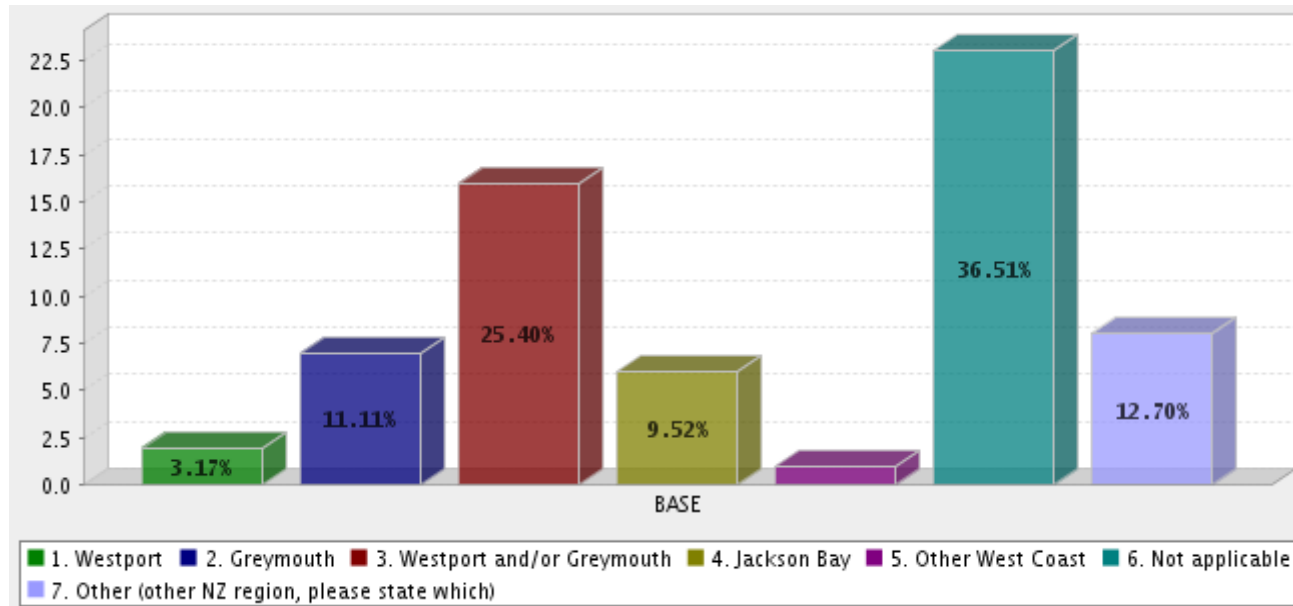
How often have you participated in any ocean based/offshore game-fishing off the West Coast in the past 5 years?



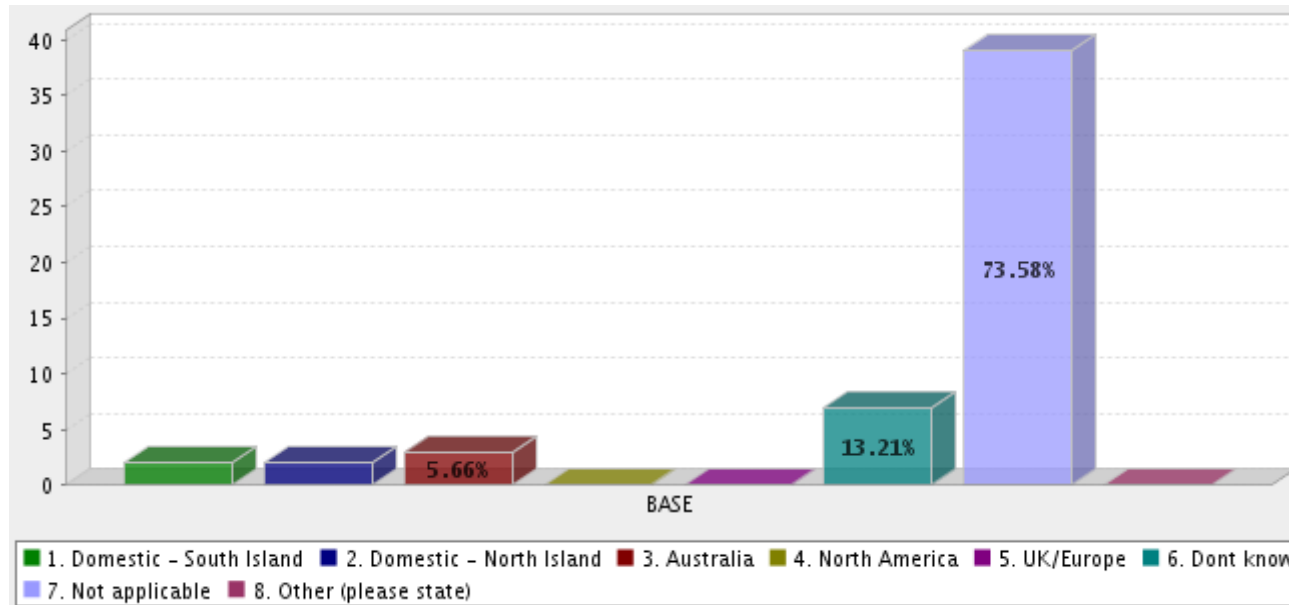
If you have never game fished off the West Coast before, what are your main reasons for not doing so? (Choose all that apply).



Which port/harbour/ramp facilities do your trips usually depart from when undertaking any fishing off the West Coast?



Commercial charter operators; in your experience, what is the origin of most of your West Coast visiting patrons?



Open ended feedback

In your opinion, what could the West Coast community do to improve the region as a game fishing destination?

- The region needs some promotion as a game fishing destination. Currently the area is made known via fishing publications or word of mouth only.
- Conservation might be a good start.
- Easier access to ice
- more advertising on tv
- Probably not much. Haven't been the last two years, so unsure of up to date facilities. As most anglers will not be local, cost effective processing / freighting options could be pushed a bit more. Possibly push 'southern bluefin' more for the early part of the season. Expand the sportfishing 'Broadbill Fishery'.
- Make all fishers and divers welcome. Have systems in place to weigh and process the fish.
- GREAT AS IT IS!
- Have a more welcoming attitude in Greymouth harbour (very friendly in Westport).
A couple of floating pontoons would be nice but not essential
- As the Coast guard are doing now, offer guided trips across the bars of the North Island Harbours.
- Very strong marketing in fishing related publications, a big push to get more locals from the South Island fishing, game fishing and inshore
- Ease of access to transport, accommodation for charter transfers, shopping for stores, fuel and ice and safe berthage not alongside rough wharves
- Promote it more, both nationally and internationally. Offer family packages that combine local tourism with marine adventures. Host large Tuna/Broadbillgame fishing competition.
- Leave it the way it is, Nature the way the coast works

- On-line promotion, somehow changing the perception of the west coast as being always windy, raining and foul weather at sea. That is why I don't go there; I hate rough water, and greatly prefer places tropical! Also, need to stress other, non-tuna related, fishing options there, salt water and freshwater both.
- Could organise a conference of game fishers such as the recreational fishing council open to the public followed by a competition and prize giving. What about something similar to the wild food festival but for fishers in mind. Maybe even a local hunt if the weather is unsuitable followed by a good get together on an annual basis.
- the trip we done was of top standard
- Foster local recreational fishing clubs that can participate and provide on-shore back-up with visiting fishers
- Move closer to the north island
- accurate weather updates
- advertise
- Better facilities. More boats. I visit Greymouth every 6 to 8 weeks and would take out clients if better facilities where available
- Better facilities i.e. boat ramp, jetty, toilets, berthage, picnic areas etc., general tidy up around the Blaketown lagoon area would be great and encourage more water activities.
- keep up with safe boating practises
- Get a decent ramp at Greymouth.
- The west coast weather is the factor in all fishing on the coast.
- Better Advertising

- Put together a complete package all inclusive!
- Better weather info
- Relax the offshore limit so boats can go further.
- Better boat ramp facilities, wash-down areas, better trailer parking, access to salt ice (even if gotta pay). a better, easier to access weigh station.

In your opinion, which NZ region presents as the best Game fishing destination? Why

- BoP
- B.o.plenty, because we have a wider range of species and more clement weather.
- Far north of NZ.....has a long season, and a good, readily accessible fishery for a wide range of species (i.e. other than billfish or tuna). It doesn't need to promote itself too strongly as the history is there.
- Northland - longer season and more variety of gamefish
- bay of islands, heaps of fish & good access
- The north eastern coast of North Island.
The books by great anglers of the catchers over the years & names, Bay of Islands Mercury Bay world known destinations.
- Your West Coast when the Bluefin are there because you will 'probably' see action as opposed anywhere else where you 'may' see some action.
Because of distance and cost, anglers coming your way are usually a lot more dedicated than lots up north where you head out for a day out with 'a chance' of getting some action if you're lucky.
- The top of the north island east coast. warm weather conditions on a reasonably consistent basis and variety of fish species available
- Northland. Weather more dependable

- West Coast - South Island. The elements are a challenge also the fishing is great.
- There are several with different reasons and seasons
- East Northland, because it has a longer season and a greater variety of species. However, the West Coast is the only place you can target Pacific Bluefin tuna. There is also a lot of potential for targeting southern Bluefin in July/August.
- Far North, East Coast, biggest congregation of game fish, usually the best water temperatures
- Northland - Zane Grey put it on the map
- Bay of Islands, West Coast North Island due to facilities and ease of access, launching etc.
- BAY OF PLENTY-UP UNTIL THE YELLOWFIN DISAPPEARED.GREAT VARIETY,EASY ACCESS,GENERALLY TRAILERBOAT FRIENDLY CONDITIONS
- North Island because we see so much of it and not enough from the south Island
- BOI as it is well promoted, Holds plenty of competitions, it has a wide variety of Game fish for all levels of angler. Weather is more settled.
- Northland, because of ease of access with a good public transport and supporting infrastructure. Good safe harbours, many with marina berthage and weigh-in stations most with local clubs in support with bars and restaurants. Good supporting shops for stores, fuel and ice availability. Processing and smoking facilities for anglers catch or ability to handle large fish for trophy mounting. An excellent sport fishing region, but we still do the annual to the west coast in search of the big tuna's.
- Whitianga. That is where my beach house it! :-)
- Gisborne East Coast for big fish .Marlin ,Tuna and Shark
- Northland because of the marlin fishing in summer. However, for some of the largest and best tuna fishing in the world, your region has it. Fishers used to go the South Carolina and New Foundland to catch large Northern Bluefin tuna, but New Foundland is depleted and the tuna off Carolina

are small compared to our west coast tuna. Internationally, our tuna could be a huge drawcard, bringing in overseas tourists, helping accommodation, incoming currency and so on. Helicopter trips into the back country, trout fishing and so on are all there. The broadbill swordfish is another species that are large, especially south of Hokitika towards Fiordland, that are untapped. Charter boat potential is very good.

- Northland. Best access in most weather conditions to large numbers and large variance of species.
- Northland more variety
- Undoubtedly Northland because of the variety and proliferation of sport fish species
- Northland
- Bay of Islands (Zane Grey)
- Bay of Islands area
- north Is
- West Coast range of fish available all down the coast
- Kawhia, small recreational boats have access to world class fishery, multi species
- not sure
- The far north - more species and possibly better weather
- West coast sometimes,northeast coast most times.
- Golden Bay because of access and weather most of the year
- B,O.I. ease of launching and no barb crossings

- Northland, because there are many areas to go according to the weather conditions, and most can be done from a smaller vessel
- west coast not to many fishing it
- Raglan, because I can get there!
- Tauranga. I have fished here numerous times, there are a lot more varieties of fish to be caught & less hassles with weather.
- Northland. Well known for big game fishing.

Regardless of whether you have game fished off the West Coast of NZ or not. In your opinion, what are the main attractions to game fish off the West Coast of NZ?

- Personally THINK FISHING BEHIND A TRAWLER IS A CHEATS WAY AND THE TUNA ARE ALL OF POOR QUALITY.
- To catch a Bluefin tuna in New Zealand, the south island's west coast is pretty well the only place to do that. Off Gisborne for example, there are a lot of Bluefin passing by, but at least 30 miles offshore and more. No recreational fisher has ever caught one however. I have been there and completed the grand slam of all tuna species as well as billfish species, and the only logical place is off the West coast. I spent many years trophy hunting there and this environment/nature/scenery is without doubt New Zealand's finest. Outdoor activity by sportspeople from overseas and locally has very much potential.
- live there
- Most of the above, but it is a one off thing to visit this area and catch a large Tuna.

If you have never game fished off the West Coast before, what are your main reasons for not doing so? (Choose all that apply)

- Not fair fishing practise I feel so do not agree with fishing behind trawlers.
- Lack of time
- distance
- Not really my type of fishing interest but would go if asked by mates to make up a team
- Not enough time to date!

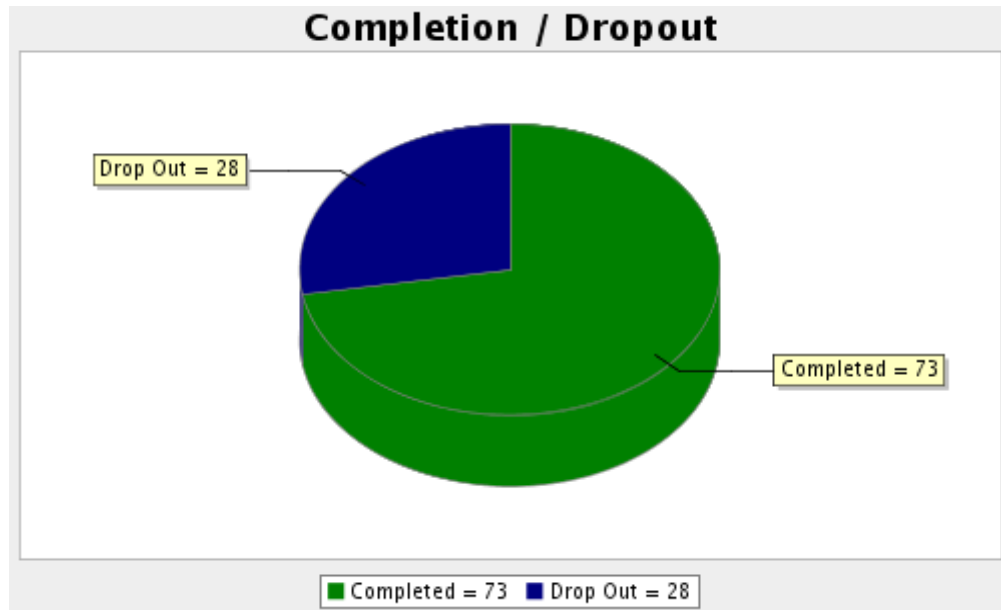
Which port/harbour/ramp facilities do your trips usually depart from when undertaking any fishing off the West Coast?

Other...

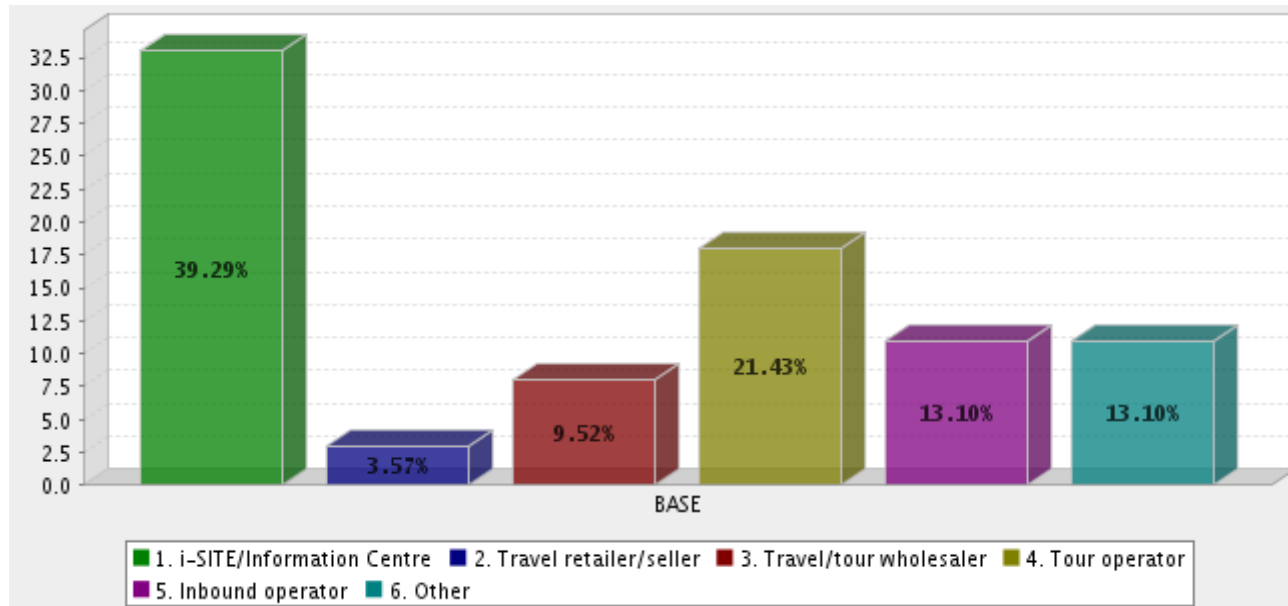
- Northland
- East Coast
- Raglan
- manukau
- wellington
- Raglan
- Waikato River

Appendix D – Survey results (Tourism trade)

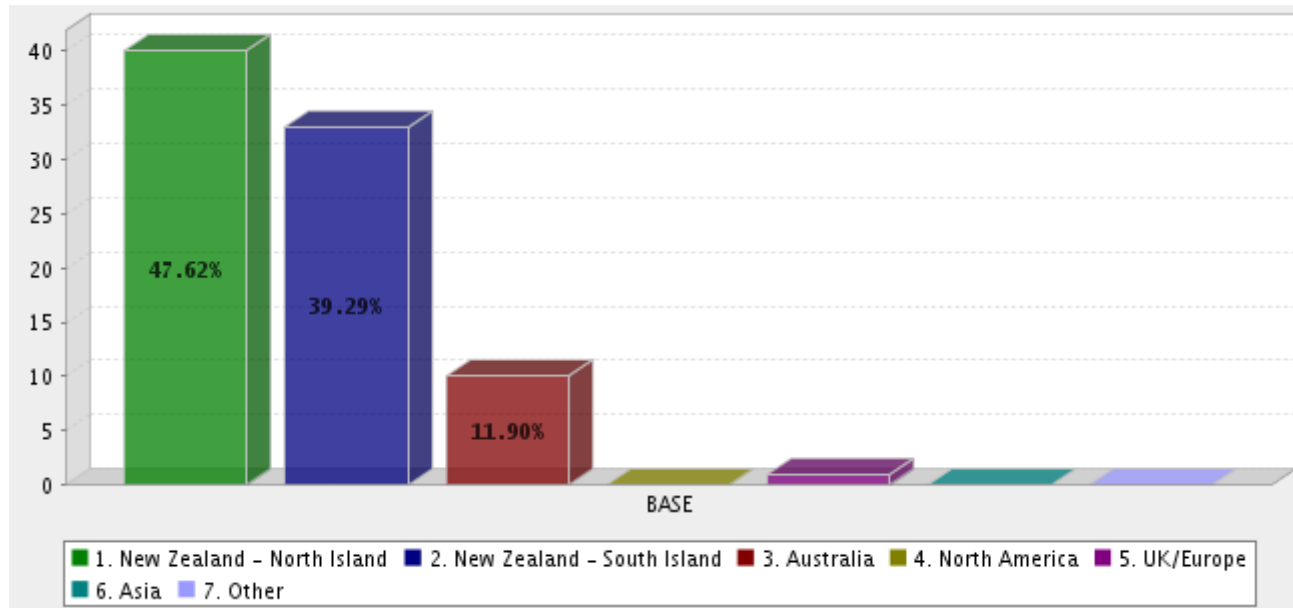
Survey Overview



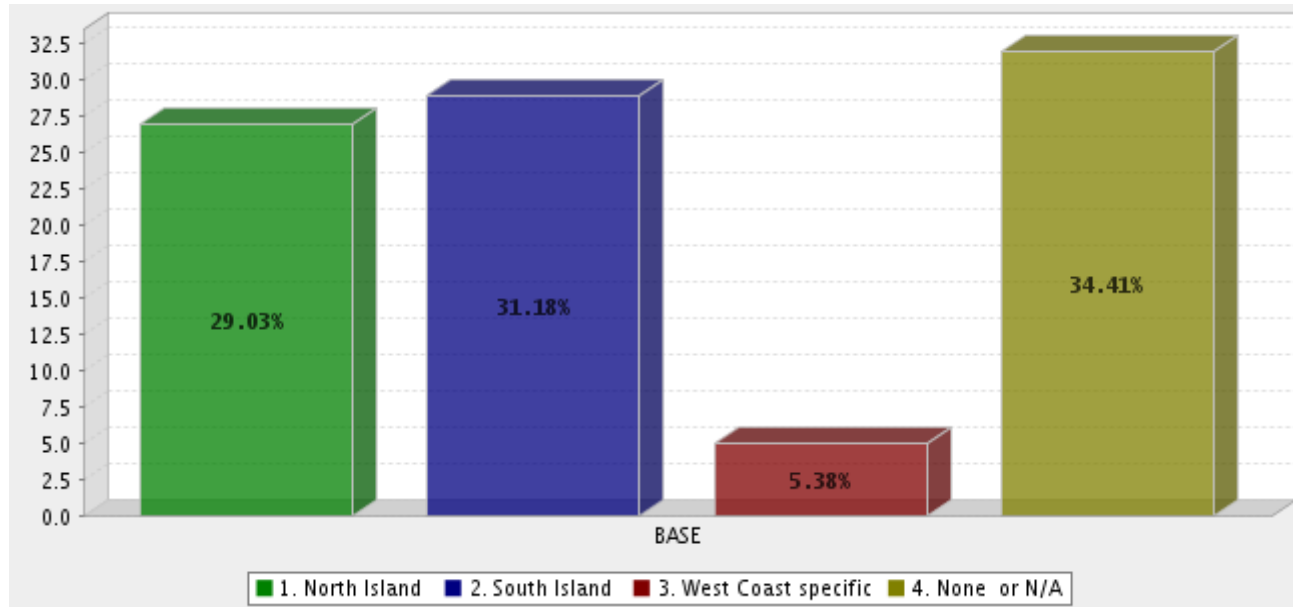
About you/your operation;Please indicate which most accurately refers to your operation



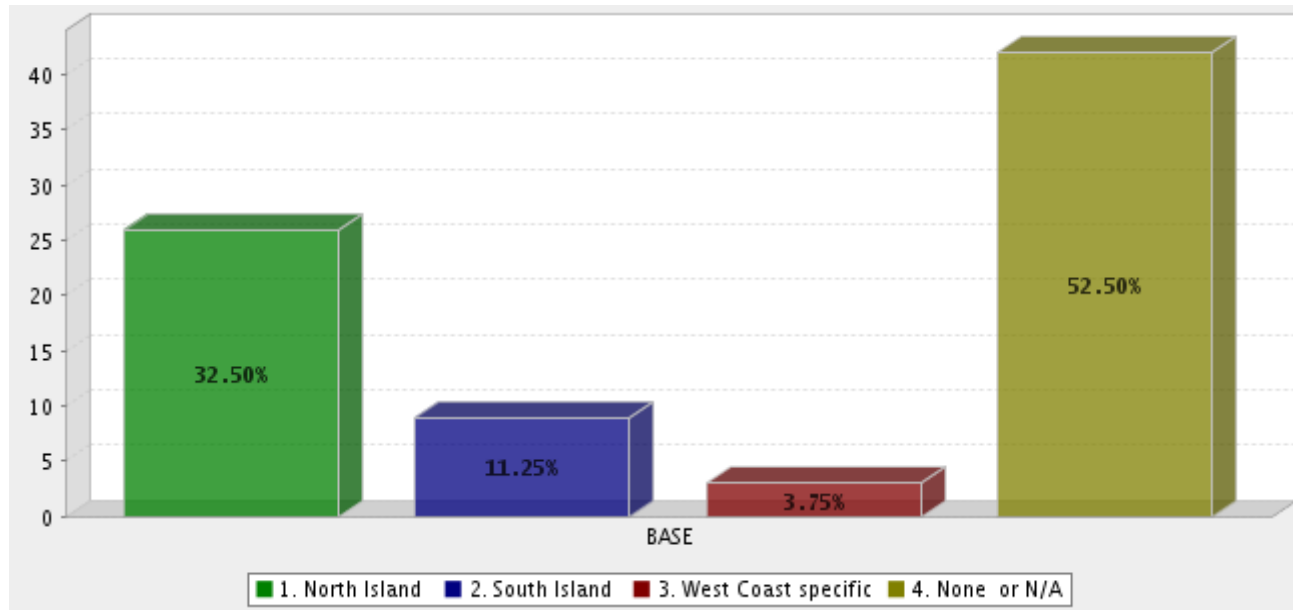
Where are you based?



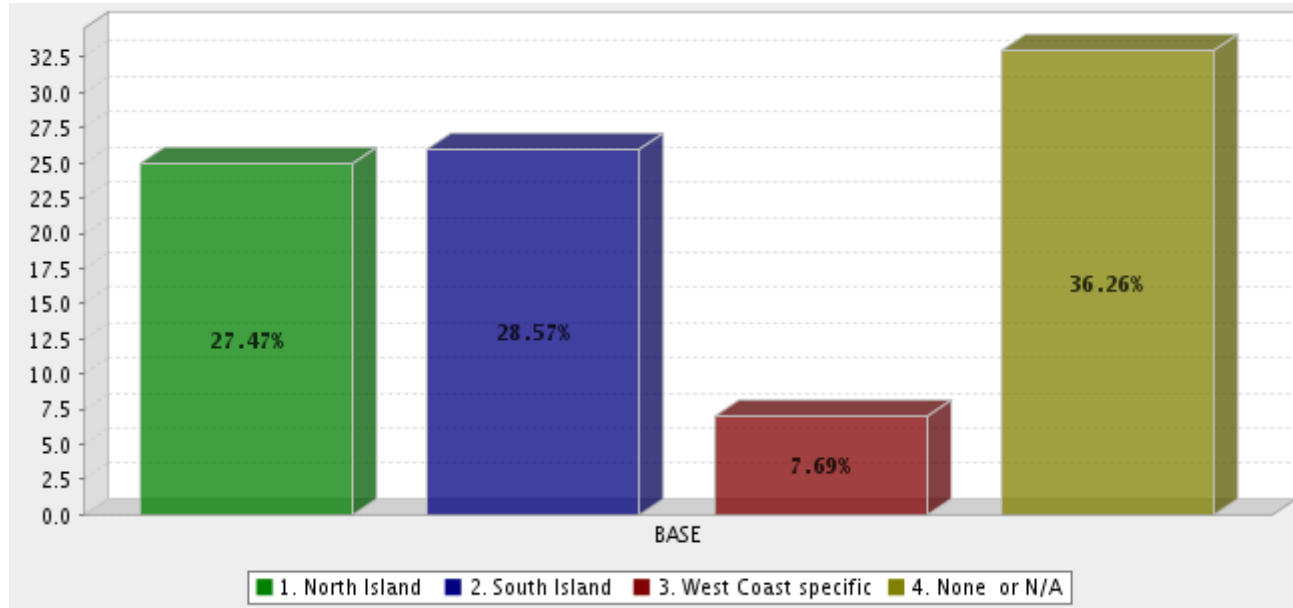
*Please indicate which of the following your firm currently offers or promotes to clients in NZ (choose all that apply).
Guided fishing activities - onshore (e.g. rivers/lakes)*



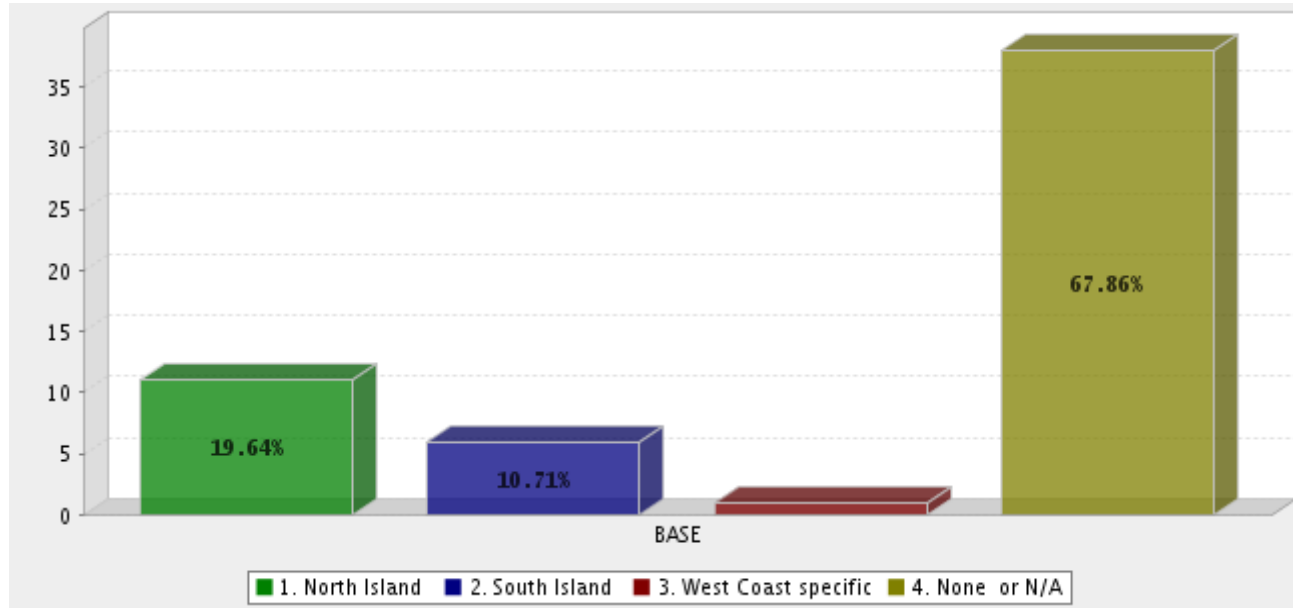
Guided fishing activities - offshore (e.g. big game/sports fishing or other offshore fishing)



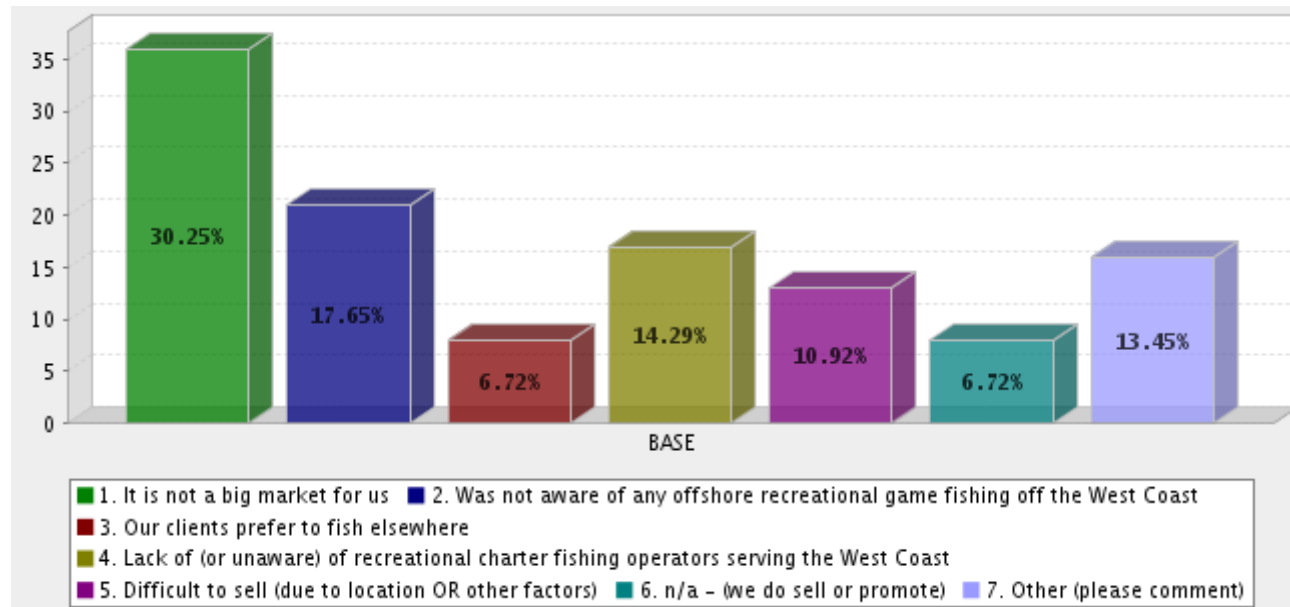
General information provision (where to fish / maps etc.)



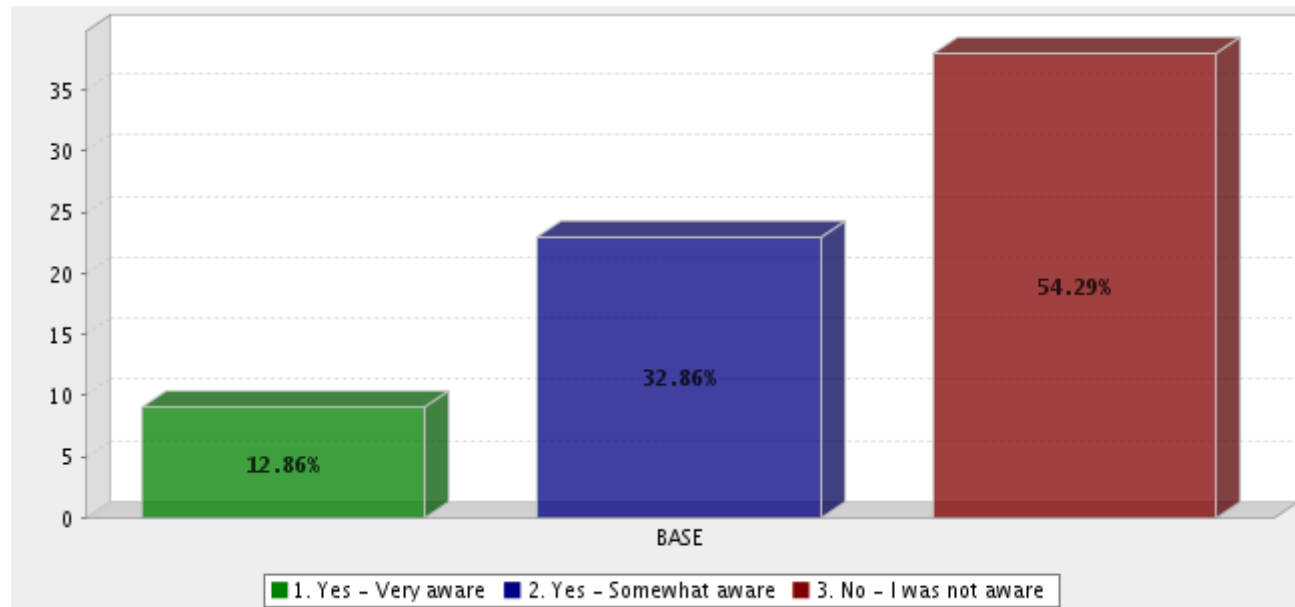
Guided fishing - coastal (e.g. rock/reef/beach/wharf)



If you do not sell or promote any West Coast of NZ based offshore game fishing activity, please state your reason (please tick all that apply).



Prior to this survey, were you aware that the West Coast of the Southern Alps region in NZ offers recreational offshore game fishing charters?



Open ended feedback

If a client/customer requested information on offshore game/sports fishing activities in New Zealand, what information or service would you currently offer?

- We do not get enquiries in regards to fishing activities
- Marlin Fishing Bay of Plenty region
- none
- refer to newzealand.com
- We only have the west coast brochures which we give out. We also look on the internet and print information off that.
- We would make a couple of calls, most likely to charter operators in Bay of islands or Tauranga region. now of course i would think of West Coast as well, but not sure which port would depart from
- Our local operators first - we have two fishing activities in close proximity, and then further afield, either Kaikoura coast or West Coast of South Island.
- We would use Google to see what is available
- We are currently researching this for a potential market so interested in any information.
- Air NZ would refer them to TNZ website

If you do not sell or promote any West Coast of NZ based 'offshore' game fishing activity, please state your reason

- We are based in the Far North so do don't sell a lot of West Coast activities but do give out the brochures.
- Our groups are general leisure tourists and our FIT's make their own plans and decisions on activities to take part in on holiday without involving us.
- Not our area of expertise.

- Recreational game fishing is not a big market for us - as far as I'm aware in 3 years not one person has asked about game fishing on the West Coast.
- If they have asked about fishing, it's about fishing in our local area.
- Local info our speciality. West Coast visitors not next onward travel destination. Also, offshore game fishing high tendency to be pre-booked, Not a last minute decision on arrival.
- Usually we only sell locally due to demand.
- Not aware of any tourism ready commercial operations promoting offshore game fishing, how good the fishing is, type of fish
- (Besides Tuna around fishing boats from Westport?)
- Any one that wish to go sea fishing generally want information and we have never received any requests to fish on the West Coast cheers Maryke
- No local properties within the area to assist with this promotion to clients
- Our collective hasn't reached the south island yet - but watch this space :)
- We suggest Fishing in the Hoianga... No big deal for us. I am interested in getting school kids in groups experience fishing but don't know anyone interested in doing it with Kids.
- fisherman tend to 'do their own thing' using word of mouth recommendations
- No requirements for this kind of product.

Other suggestions/comments

- Still have no idea of where charters would depart from, seasonality, pricing, target species etc. would like to know more.
- Would be interested in receiving information on offshore game fishing options on West Coast.
- Good Idea. You could charge big bucks from some fat cat who wants to exhaust him/herself catching a Southern Blue Fin in early spring behind a Hoki Ship.

- While my knowledge of West Coast fishing and charters is limited I consider it a "Bucket List" item and hope to have an opportunity sometime in the future.
- To be interested it needs to be commissionable to wholesalers at 20%. Shared charters are fine as long as people understand that to begin with.