

New Mexico Outdoor Recreation Division Outdoor Recreation Business Survey

June 2024



NEW MEXICO
OUTDOOR RECREATION DIVISION

OVERVIEW

The New Mexico Outdoor Recreation Division (ORD) developed and administered a survey targeting the state's outdoor recreation (OR) businesses to determine how the office can best support these companies to grow and succeed. Working with endeavOR New Mexico, the state's outdoor recreation business alliance, a concerted effort was initiated to reach all OR business residing in the state.

The survey was conducted online using Google Forms. It was released on May 15 and closed on June 7, 2024. A total of 105 responses were received from a diverse range of OR businesses and organizations located throughout the state.

OUTDOOR RECREATION BUSINESS SURVEY

The OR Business Survey featured 24 questions designed to elicit the type of information that will best enable ORD to assist the OR business community moving forward.

This report highlights the findings of the OR business survey.



Questions 1 to 5 – OR business general information

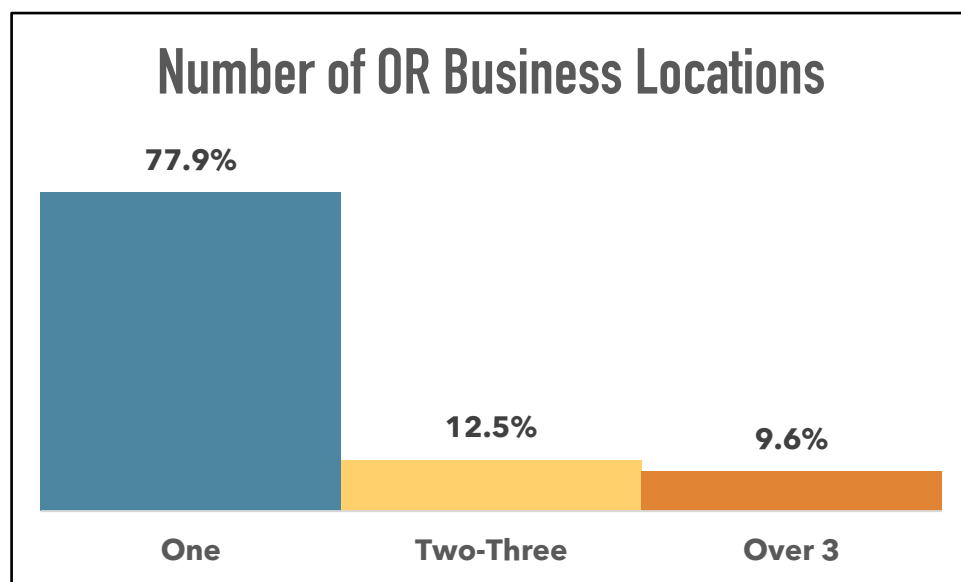
The first five questions of the survey obtained general information from respondents including name, business name, address, email, and phone.

Question 6 – In what county is your OR business primarily located?

County	OR Businesses	County	OR Businesses
Bernalillo	21	Lincoln	2
Santa Fe	17	Otero	2
Taos	17	Cibola	1
San Juan	12	Eddy	1
Colfax	8	Guadalupe	1
Los Alamos	4	McKinley	1
Catron	3	Mora	1
Dona Ana	3	Sierra	1
Grant	3	Socorro	1
Rio Arriba	3	Outside NM	1
Sandoval	3		

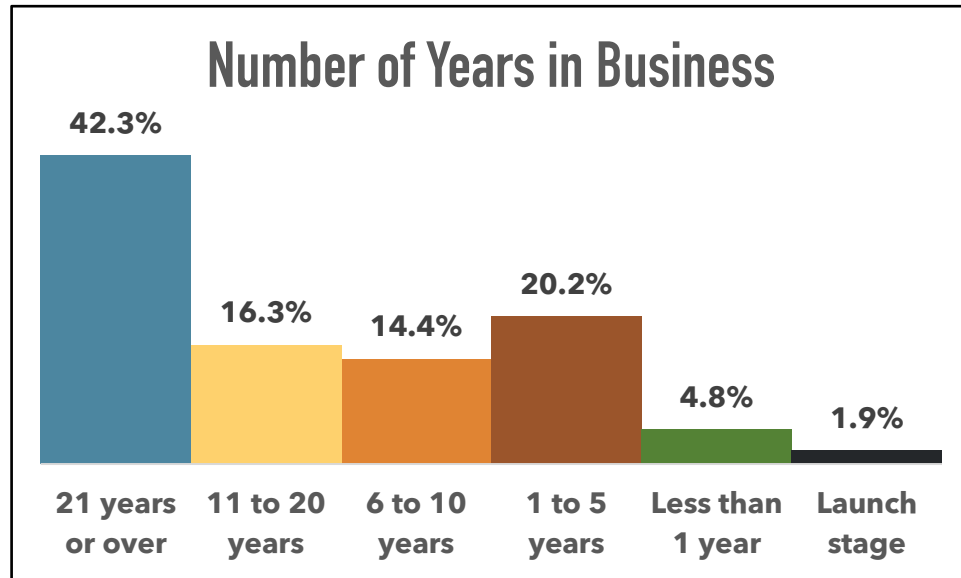
Survey responses were obtained from OR businesses operating throughout the state. Counties located in northern and central New Mexico represents the largest number of overall submissions.

Question 7 – How many OR business locations do you operate in New Mexico?



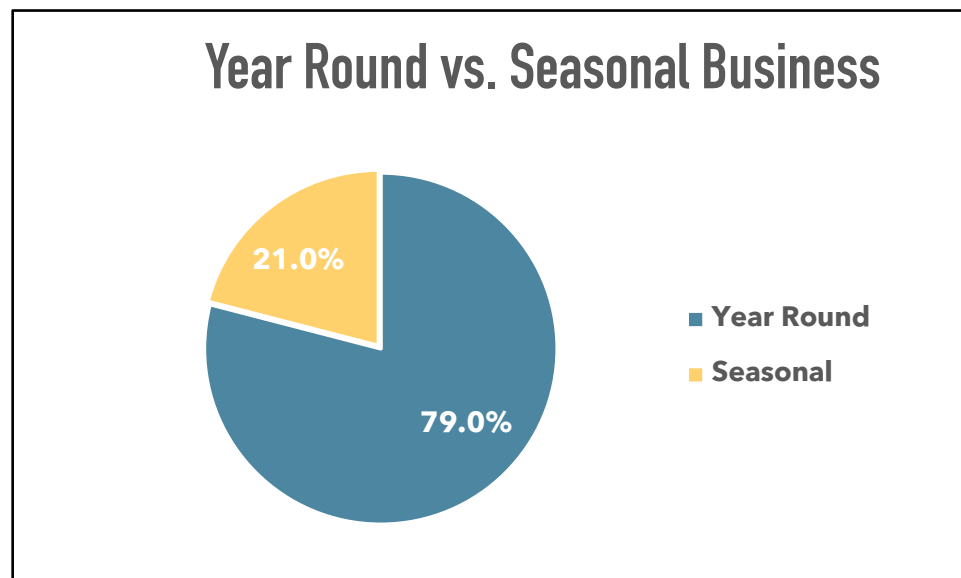
Overwhelmingly, 77.9% of respondents operate at a single location. Those operating two or more locations is 22.1%.

Question 8 – How many years has your OR business been operating?



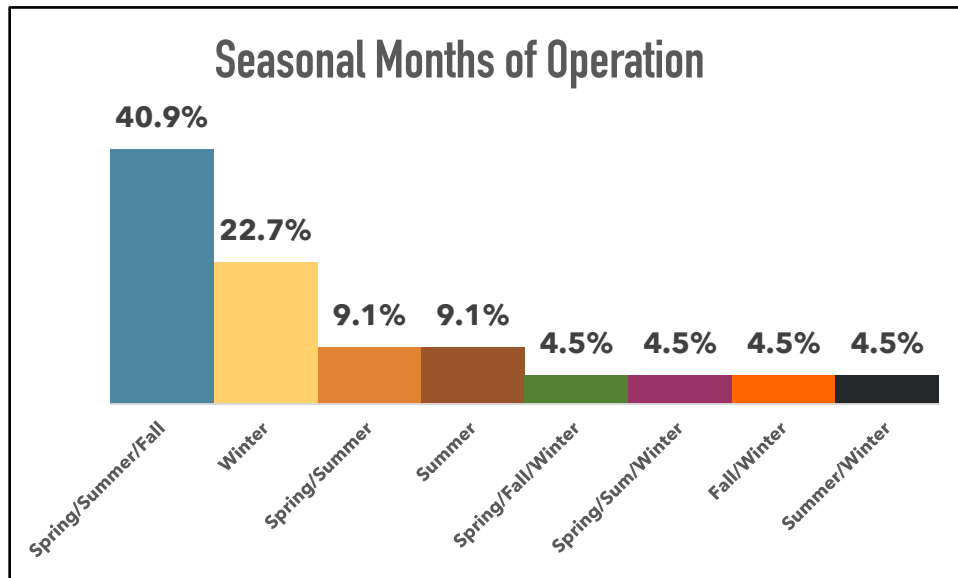
Of the OR businesses that responded, 42.3% have been operating for 21 years or more. Businesses operating from 6 to 20 years is 30.7%. The remaining businesses, ranging from launch stage to 5 years, is 27%.

Question 9 – Are you a year-round or seasonal business?



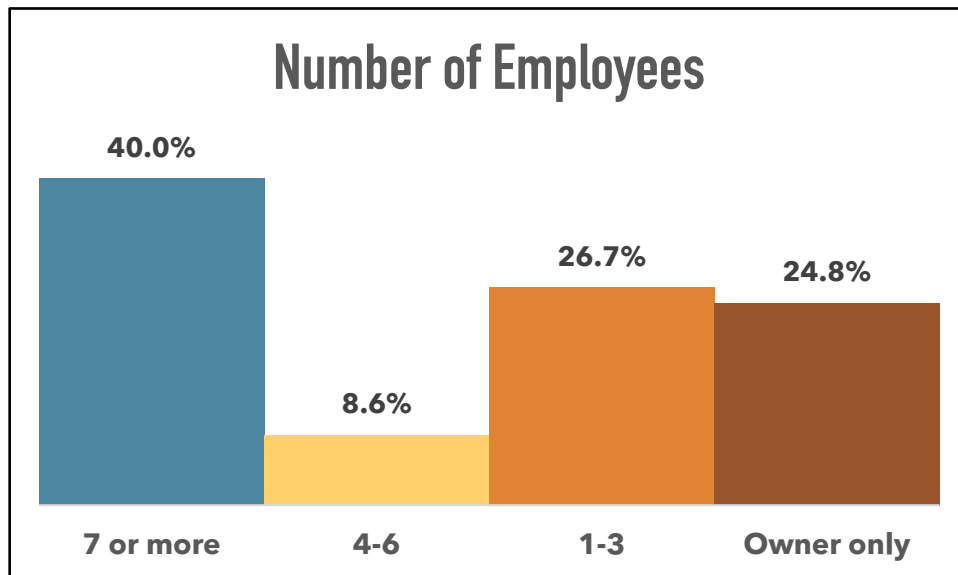
79.0% of the OR businesses responding indicate they operate year-round. 21.0% of the business operate seasonally. Question 10 below provides a more in-depth look at the seasonal businesses.

Question 10 – If seasonal, please check all that apply.



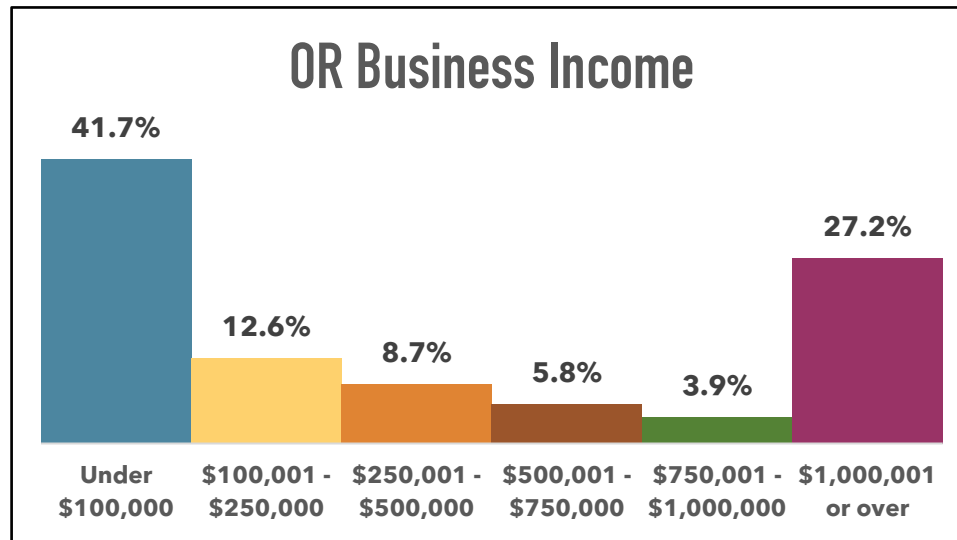
Most of the New Mexico OR businesses who operate seasonally avoid the winter months. However, 22.7% of seasonal businesses only operate in winter. This higher response is primarily attributed to New Mexico ski destinations.

Question 11 – How many people does your OR business employ other than yourself?



Surprisingly, New Mexico OR businesses employ a diverse number of people. The majority of businesses employ 7 or more at 40.0%. Businesses that hire between 1 to 6 employees is 35.3%. Those businesses operated solely by the owner are 24.8%.

Question 12 – What is your annual OR business income?



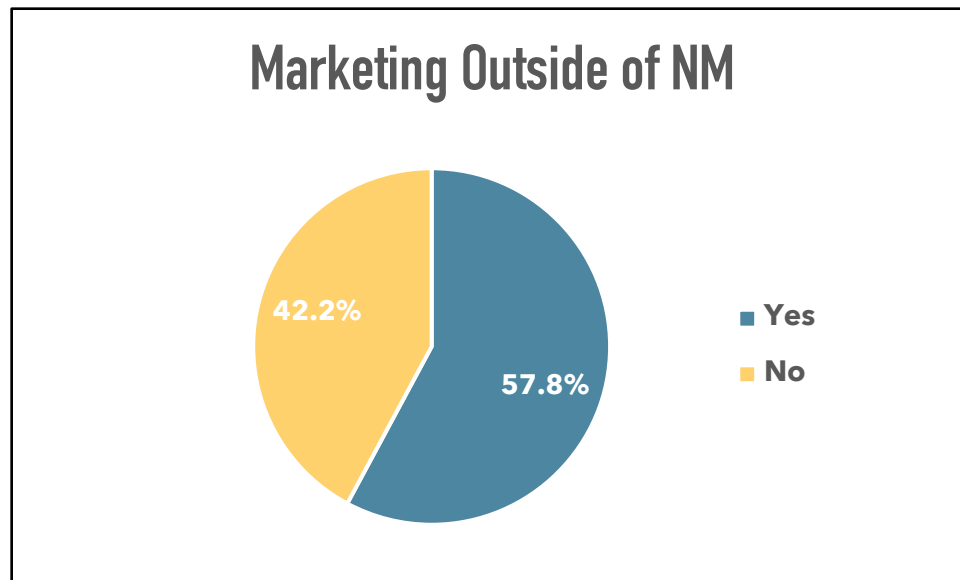
OR business respondents indicate that most generate annual income of less than \$100,000 at 41.7%. At the other end of the income continuum, 27.2% shared they surpass \$1 million annually. The remaining 31.1% of businesses range between \$100,000 and \$1 million, with the majority under \$500,000.

Question 13 – How do you currently attract and engage customers?
Please select all that apply.

In today's digital world, it's not surprising that the top marketing channel for OR businesses is social media at 90.5% and websites are 82.9%. Many of the businesses utilized online reservation systems and/or online sales at 40.0% and 36.2% respectively. Newsletters follow next at 32.4%, which can be both electronic and mailed. It is interesting to note that traditional media such as print, TV, radio, billboards, tradeshow, word-of-mouth, events, and networking are substantially lower, ranging between 1.9% and 28.6%. Regarding "Other," examples include sales representatives, retail location, and signage.

Marketing Channel	OR Businesses
Social media	90.5%
Website	82.9%
Reservations	40.0%
Online sales	36.2%
Newsletter	32.4%
Traditional media	28.6%
Tradeshows	21.0%
Word of mouth	17.1%
Events	4.8%
Networking	1.9%
Other	11.4%

Question 14 – Do you market outside of New Mexico?



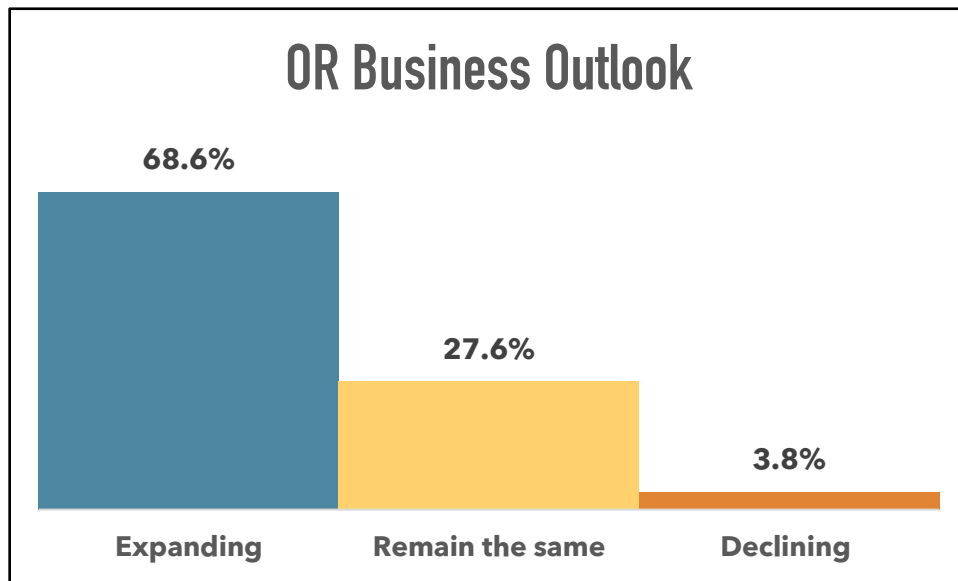
When asked where they target customers, 57.8% of the OR businesses market outside New Mexico while 42.2% focus exclusively inside the state. Question 15 provides insight into where OR businesses market when seeking business outside the state.

Question 15 – If yes, please let us know which geographic areas you market in outside of New Mexico.

Most respondents market to neighboring states such as Texas, Colorado, Arizona, Oklahoma, Utah, and California. 27.8% of the OR businesses promote nationwide and 11.1% target worldwide. Other locations include eastern United States, Canada, and Europe.

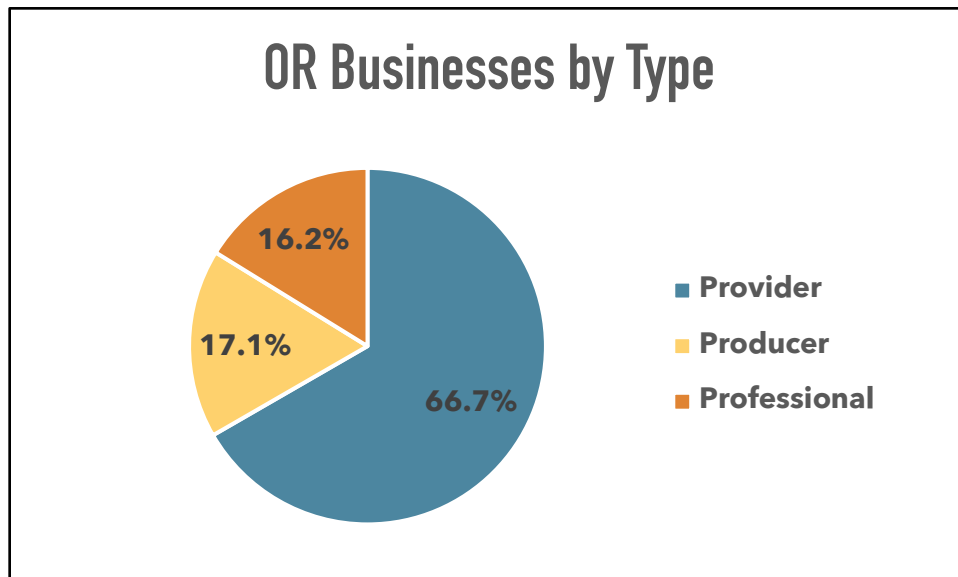
Location	OR Businesses
Texas	44.4%
Colorado	37.0%
Arizona	33.3%
Nationwide	27.8%
Oklahoma	20.4%
California	13.0%
Worldwide	11.1%
Louisiana	9.3%
Arkansas	7.4%
Utah	5.6%
Kansas	5.6%
Mexico	5.6%
Other	22.2%

Question 16 – What is the outlook for your OR business over the next three years?



Most New Mexico OR businesses surveyed shared an optimistic outlook for the next three years. 68.6% indicate they will be expanding while 27.6% anticipated holding steady. Only 3.8% of the businesses forecast a decline in the coming years.

Question 17 – What type of OR business do you consider yourself?



Three broad industry categories were used to segment New Mexico OR business types. Each category is defined below:

- ❖ **Producer** - a designer, manufacturer, distributor, retailer, or repairer of outdoor clothing, gear/equipment, or vehicles

- ❖ **Professional** - a professional working in or for outdoor recreation including technical, creative, management, scientific, business, and corporate professionals
- ❖ **Provider** - outdoor experiences (e.g., guide, outfitter, rental, educator, recreation areas or centers) or services that support and cater to outdoor recreationists as clients (e.g., food, beverage, lodging)

67.7% of survey takers identify as a provider while 17.1% selected producer. The remaining businesses chose professional at 16.2%.

Question 18 – Which outdoor recreation sector does your OR business serve? Please select all that apply.

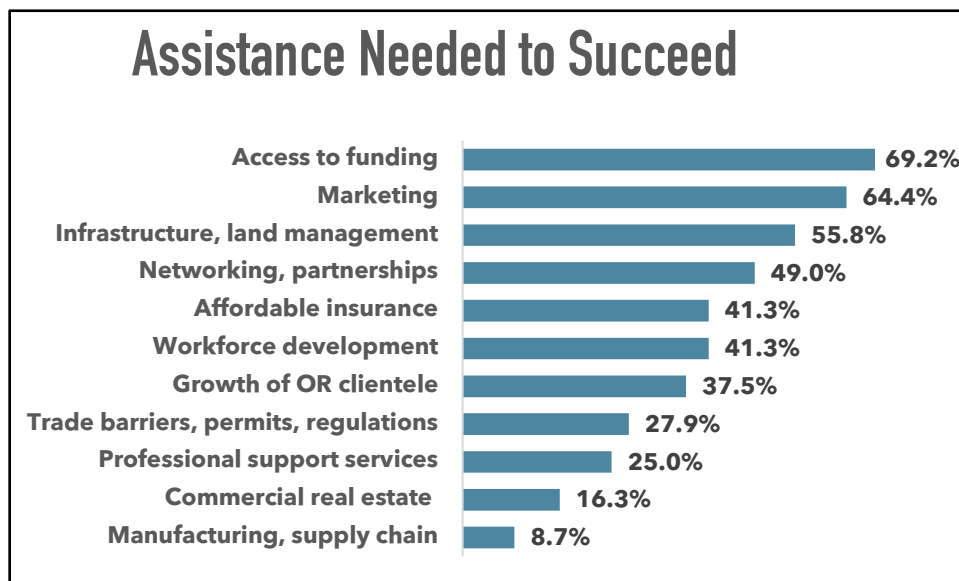
OR Sector	OR Businesses
Trail Sports	55.9%
Camping	39.2%
Wheel Sports	36.3%
Snow Sports	32.4%
Fishing	25.5%
Water Sports	25.5%
Wildlife Viewing	22.5%
Hunting	15.7%
OHV	10.8%
Motorcycling	7.8%
Tours	7.8%
Other	27.5%

This survey utilized OR sectors as defined by the Outdoor Industry Association (OIA). Camping - RV, tent, and lodges; motorcycling on-road/off-road; OHV (off-highway vehicles) - ATV, 4x4 and Jeep; trail sports - hiking, running, backpacking, horseback riding, rock climbing; water sports - kayaking, paddle boarding, boating; wheel sports - road biking, mountain biking, gravel.

Trail sports is listed as the #1 outdoor sector most served by New Mexico businesses at 55.9%. Camping, wheel sports, and snow sports follow in the next tier ranging from 32.4% to 39.2%. The next lower tier includes fishing, water sports and wildlife viewing at 22.5% to 25.5%. Hunting, OHV, motorcycling, and tours resided in the final tier from 7.8% to 15.7%.

The review of "Other" indicates hot air ballooning, team sports, disc golf, agritourism, conservation, and events.

Question 19 – How can ORD best help your OR business to succeed/overcome challenges? Please check all that apply.

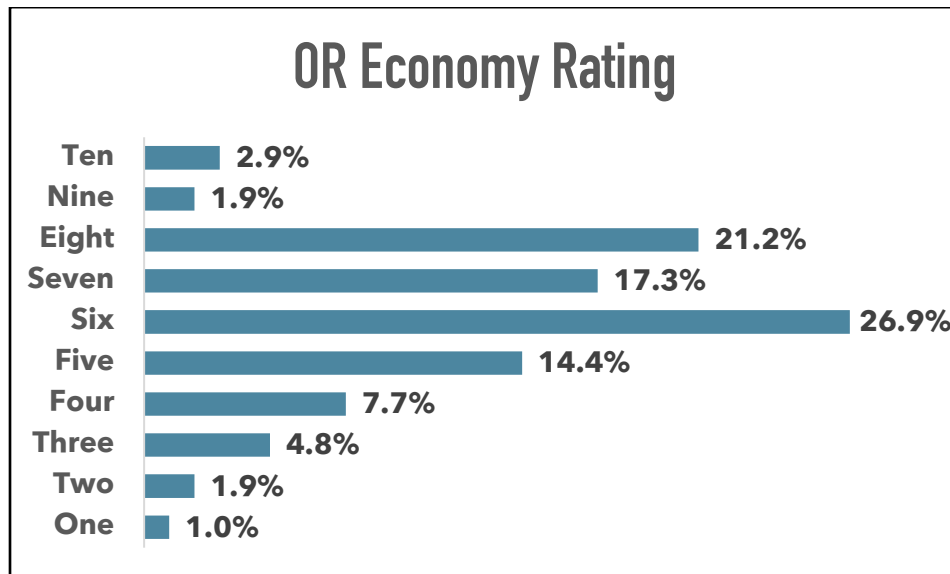


The survey asked OR businesses to share how the Outdoor Recreation Division can best assist them to succeed and offset challenges. Access to funding is the top need of businesses statewide at 69.2%. Funding is defined as grants, loans, and equity investment. Marketing was the second biggest need at 64.4%. Rounding out the top three is infrastructure/land management at 55.8%.

The next tier includes networking/partnerships, affordable insurance, workforce development, and growth of OR clientele ranging from 37.5% to 49.0%. The lower tier notes trade barriers/permits/regulations, professional support services, commercial real estate, and manufacturing/supply chain ranging from 8.7% to 27.9%.

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Question 20 – On a scale of 1-10 (with 10 being the highest), how would you rate New Mexico's current outdoor recreation economy?



OR businesses were asked to rate the current state of New Mexico’s OR economy. The responses closely resemble a classic bell-shaped curve. With a score of 10 being the highest, the weighted average for all replies is 6.2.

Further analyzing the curve, 7.5% of scores are in the lower third (1 - 3); 67.0% in the middle third (4 - 7); and 25.5% in the upper third.

Question 21 to 24 – Open-ended questions

The OR business survey included four open-ended questions that enabled survey takers to provide their thoughts and opinions related to the following:

- ❖ What is the one thing ORD can do to assist your business to be more successful?
- ❖ What is the one thing New Mexico should do to grow the state’s outdoor recreation economy?
- ❖ What emerging trends or opportunities in the OR industry are you excited about or preparing for?
- ❖ Please add any other comments or thoughts you have about outdoor recreation in New Mexico.

More than 300 remarks were captured. A sample of these comments are highlighted below.

Question 21 What is the one thing ORD can do to assist your business to be more successful?	
You could offer incentives to help new businesses with startup costs, attending trade shows, international research/trade missions,	Funding opportunities for marketing initiatives for outdoor rec industry.

travel costs to evaluate suppliers, and legal costs of regulatory compliance.	
Create a "binder" of contacts for commercial operating permits with contacts, and office locations for the federal lands in New Mexico.	Get a seasonal designation for employees of seasonal business so that our unemployment rate is not so high.
Help with consistent government regulations of tour operators.	More focus on helping the OR businesses and less on equity and social funding. Money is being given in the form of grants to "non-profits" who are competing with OR businesses.
Keep the land-owner tag system alive.	Help communities across the state to understand they all have the ability to grow the outdoor recreation economic sector.
Focus on building locale-based support networks for each industry, then interconnecting each network with the others, then utilizing those networks for a cohesive, industry-built effort to engage, educate and inspire the general public to get outside and try something new – helping people find what they love by not ONLY courting the existing outdoor industry and 'core' audiences, but helping companies refresh their messaging and widen their reach to interact better with people who are new to the outdoor industry.	There are zero grants for 'for profit' business. I realize grants for nonprofits are important however this leaves businesses operating in the outdoor rec space with nothing. The businesses are the ones generating tourism and tax revenue from outdoor recreation but there is no support for business from the outdoor Rec department.
Assistance developing school apprentice / trade programs (electricians, welders, mechanics, hospitality professionals)	Assist EXISTING companies in getting permits, promoting outdoor adventures in New Mexico, and supporting our marketing efforts. I am SO damn tired of New Mexico being focused on promoting new business. It can be done in conjunction with helping existing businesses.
Assistance with workforce housing and public transportation initiatives.	Startup funding.
Educate students on use and benefits of outdoor activities	Help manage federal and local regulatory agencies to be more open to expansion of business.
Lobby the State to lobby insurance companies about insurance rates.	

Question 22 What is the one thing New Mexico should do to grow the state's outdoor recreation economy?

Focus on incentives for brand new startups to get off the ground. Help them foster and grow and some of them will emerge as major companies.	Increased focus on seasonal employee recruitment, housing, and public transportation.
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Continue supporting OR businesses with financial aid (grants) and other services (legal, tax, advertising, etc.).	Help support the increase in the cost for permitting access in public lands managed at a State Level. The existing Cost Benefit matrix is beyond Disproportionate.
Engage businesses in smaller communities and towns or help them grow into those smaller places to help grow OR in underserved areas.	Prioritize outreach to BIPOC & Queer communities and not only try to attract out of state people.
Push public landowners to support recreation by being proactive. Get the non-profits involved. The process for accessing guiding permits on public land should be streamlined.	We need an introduction to outdoor recreation classes, touring the state, and bringing teachers and equipment to all the small towns across the state. Show the public how to get outside and where to get outside; kids and adults might not even know they like or enjoy a recreational resource until they try it.
Make state, BLM and federal permitting easier to secure and update antiquated system to online applications, renewals, and paperwork.	Offer grants to the outdoor industry.
Assistance developing school apprentice / trade programs (electricians, welders, mechanics, hospitality professionals).	Encourage and assist local outdoor recreation businesses to create and maintain websites, advertise online, and engage in the digital market. Provide low-cost advertising for these businesses in state publications such as New Mexico magazine.
Assistance with workforce housing and public transportation initiatives.	Help to grow the outdoor equity grant program and provide a website that entities can use to find businesses to partner with on grants. Host free or low-cost conferences to connect philanthropic organizations, businesses, non-profits, government entities, and schools to incubate collaboration.
Startup funding.	Encourage community planners to incorporate trails into development plans to connect residential areas with schools, parks, etc.
Focus on building locale-based support networks for each industry, then interconnecting each network with the others, then utilizing those networks for a cohesive, industry-built effort to engage, educate and inspire the general public to get outside and try something new – helping people find what they love by not ONLY courting the existing outdoor industry and ‘core’ audiences, but helping companies refresh their messaging and widen their reach to interact better with people who are new to the outdoor industry.	Invest in business operating in state. Provide some grants for these business to market and grow.

Proactively engage youth to become aware of career opportunities in the OR sector.	Certification program for guides.
Pass legislation that reduces the risk of lawsuit to help lower rates, especially Workers comp.	MTB destinations could use signage like you see on 550 near San Ysidro announcing the White Ridge trails. A well-organized Gravel ride/race in NM could easily become the biggest cycling event in the state. National NM True campaigns are a great way to talk about NM cycling opportunities.
The State needs to lobby insurance companies to provide coverage for what a particular business does. A company that transports 10 or less guests should not pay the same commercial auto insurance premiums as a business providing bus tours.	Invest in kids: so they develop their own skills, agency, vision and motivations live well and thrive within the industry and economics. I think the OR economics in our region will thrive when a younger, local generation of young adults/adults take it by the reigns; folk who grew up in a place and who want to protect, and have intimate visions for it.

Question 23 What emerging trends or opportunities in the OR industry are you excited about or preparing for?

Chatbots and related technology in planning for recreation.	Newly retired people looking for Outdoor recreational activities. Newly retired people in good health with financial freedom looking for things to do is growing every year.
Outdoor classrooms!	The EXPLORE Act
The increase of more and more people being able to work remotely allowing folks to live where they recreate.	Mountain Biking Parks, Hut to Hut back country hiking/skiing.
Gravel biking, Mountain biking.	Enjoying the increase traffic of van life and the outdoor lifestyle folks are looking for, that comes with van life.
Next generation engagement: identifying alignment between STEAM (science, tech, art, math) and the outdoor industry.	Outdoor excursions that promote week or weekend packages for families to come and enjoy the sports offered- our is Skiing and riding- snow sports.
In-depth cross-cultural sharing as part of experiencing the outdoors, events and festivals that are multi-disciplinary, inter-generational, and community-building.	E-bikes are attracting non-cyclists and giving aging riders a new lease. The State recently passed e-bike classification rules, which is great. The Natl Forest Service needs to make any trail open to MTB open to Ebike. The Ebike is only feared by those who don't understand them. You still have to pedal, you still get a workout. But you can ride uphill with more ease, you cover far more ground faster, and you can't go any faster downhill than on a non-Ebike.

	Demystifying this among policy makers would help.
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Question 24 Please add any other comments or thoughts you have about outdoor recreation in New Mexico.

Protect and advocate for the passive use of water and bang the drum for the economic value it creates to local communities when river features are built. Think Colorado.	We need legislation that provides tax incentives for people to purchase electric bicycles for transportation that is not tied to low income or income equality.
The rock-climbing community needs support to fund and maintain climbing hardware. There is currently no public method for funding this fundamental safety equipment. Rock climbing is usually in rural areas which supports the economies of rural communities. I'd very much like to see more proactive climbing development coordinated at a state level.	The state should have funds dedicated to supporting the startup or expansion of outdoor recreation businesses. This could look similar to how the state dedicated resources to grow the film industry.
Our biggest challenge is getting young people outside, getting them away from screens, giving them an appreciation for nature and their own health and wellbeing. FB4K-NM has repaired and donated thousands of bikes to kids who might never have a first bike. The Governor, Natl Guard and BTI recently donated 200 new bicycles to NM kids last month. Bike skills are being taught in grade schools. When kids grow up with a bicycle, the outdoors becomes an essential part of their lives.	We greatly appreciate what the outdoor rec department has done for New Mexico. Our only hope is that some of the funds that are available could be used for our business. Most of the grant recipients that we have seen have been nonprofits doing trail work and other important things however, many of these projects do not actually boost outdoor rec from tourists or locals who have the capital to actually create economies of scale.
Struggling to survive right now due to high costs of everything especially ridiculous insurance costs! We lost \$200,000 during Covid and then another \$300,000 due to the Black Fire. We need your help to recover!	
NM needs some deregulating in its oversight.	

CONCLUSION

This OR Business Survey Report provides unique insight into New Mexico’s OR industry. Utilizing the data and responses, ORD will be well positioned to assist these businesses to grow and succeed while further advancing New Mexico’s OR economy. This data can also be used as a benchmark to determine how the state’s OR sector is growing in the future.



This report was produced by [endeavOR New Mexico](#), the state’s outdoor recreation business alliance, in cooperation with Once a Day Marketing LLC.