

Economic Impacts of Guided Hunting & Fishing in New Mexico

Produced by:



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For the:



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Executive Summary

Nonresidents visiting New Mexico to enjoy the state's abundant fish and wildlife resources produce significant economic impacts benefitting all state residents. This report examines their expenditure and the resulting economic impacts. Plus, it explores nonresident hunters and anglers' travel habits, preferences and other factors that can be used to help maintain this important tourism pipeline.

This report describes the steps and methods employed to develop the results and presents the full results. A graphics-designed executive report is also available from the New Mexico Council of Outfitters and Guides (NMCOG) summarizing the top-level takeaways.

In total, nonresident hunters and anglers spend \$232.5 million annually in New Mexico to access and enjoy the state's fish and wildlife resources. Of all species and activities, elk hunting generates the largest share of these dollars, \$125.9 million.

Table E-1: Total Spending by Nonresident Hunters and Anglers in New Mexico

	Elk	Pronghorn	Deer	Sheep	Hunting other species	Fishing	Total
Outfitter Fees & Tips	\$96,074,737	\$7,310,837	\$8,900,461	\$1,807,135	\$9,838,175	\$31,934,055	\$155,865,400
Trip Related Expenses	\$18,731,818	\$2,367,853	\$2,559,563	\$547,865	\$4,573,493	\$28,712,835	\$57,493,427
Equipment	\$7,377,460	\$770,703	\$1,381,468	\$147,142	\$163,882	\$3,086,175	\$12,926,830
Repair & other services	\$3,723,045	\$161,327	\$337,979	\$32,992	\$753,237	\$0	\$5,008,580
Other	\$31,852	\$0	\$6,589	\$0	\$0	\$1,173,543	\$1,211,984
Total	\$125,938,912	\$10,610,719	\$13,186,059	\$2,535,135	\$15,328,788	\$64,906,608	\$232,506,221
* Spending received by out of state businesses and individuals, such as airlines, fuel and food purchased prior to departure are excluded.							

Once spent, nonresidents' dollars exchange hands multiple times as they move through the state economy, supporting jobs and generating tax revenues and other benefits. The total contributions generated by this multiplier effect are substantial, with over 8,700 jobs dependent on New Mexico's nonresident hunters. Table E-2 summarizes these benefits, with details by species and activity within the full report.

Table E-2: Economic Contributions from Nonresident Hunters and Anglers in New Mexico

Hunting and Fishing	
Direct spending	\$232,506,221
Jobs	8,733
Salaries & wages	\$168,154,745
GDP contributions	\$221,258,107
Total multiplier effect (output)	\$306,392,674
State & local tax effects	\$11,985,870

Maintaining this important source of income and benefits for New Mexico requires understanding nonresident hunters and anglers' interests and needs. To help manage this important industry, nonresident hunters and anglers were asked about their activity, satisfaction with the guided experience, as well as their demographics. Highlights are shared here, with detailed charts and tables in the full report.

- Just over a third of nonresident hunters surveyed stayed extra nights in New Mexico to do other things besides hunt (Figure 14). The number one activity they participated in was sightseeing (69%).
- 65% said they would not have visited New Mexico if they were unable to hunt.
- 68% of guided hunters said they were at least somewhat unlikely to hunt in New Mexico if they could not hire a guide. 50% reported they were very unlikely to do so.
- The top three reasons for hiring an outfitter to hunt in New Mexico were: 1) better odds of securing a license, 2) to benefit from the outfitter's expertise, and 3) to access land. For anglers, the most important reasons for hiring a guide were to benefit from their experience and expertise, followed by having necessary gear and supplies.
- Overall satisfaction with the guide experience was high, with 80% of non-resident hunters saying they were very satisfied and another 11% saying they were somewhat satisfied. 97.5% of guided nonresident anglers were very satisfied.
- 41% of nonresident anglers said they hired a guide or outfitter to fish in New Mexico in 2023.
- The number one river fished by guided nonresident anglers was the San Juan at 69%, with the Rio Grande a distant second (10%).

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Introduction

Maintaining equitable tag allocation and regulation policies are more successful when decision-makers understand the jobs, retail sales, tax revenues, returns to landowners and county governments plus other economic contributions generated by outfitters and guides. To aid in this effort, the New Mexico Council of Outfitters and Guides (NMCOG) partnered with Southwick Associates to conduct a study of New Mexico’s nonresident hunters and anglers, in particular those that hired an outfitter to hunt or fish in 2023. This was accomplished with surveys of these populations along with a survey of outfitters themselves to determine how much guided hunters and anglers spent in New Mexico in 2023 and how that spending worked its way through New Mexico’s economy. The study also explored nonresidents’ experience with guides and outfitters and other aspects of their hunting and fishing activities.

Data and Methods

Survey

There were three target groups for this study: nonresident big game hunters, nonresident anglers, and outfitters. Hunters and anglers were surveyed together, with different tracks for each depending on the species targeted, while outfitters were surveyed separately. In total, 8,000 nonresident hunters, 2,000 nonresident anglers, and 260 outfitters were sent email invitations to participate in the surveys. To identify hunters and anglers for the survey, NMCOG obtained permission for Southwick Associates to obtain licenses and tag sales records from nonresidents only from the New Mexico Department of Game and Fish for purposes of this project only. Data received included email contact information, units hunted, as well as any permits held by each respondent including EPLUS tags.

Sampling Frames

- Hunters: 8,000 non-resident licensed hunters. Care was taken to ensure a balanced sample was used reflecting those who hunted elk under EPLUS or not, species permitted, and units hunted.
- Anglers: 2,000 non-resident anglers were chosen randomly from all 2023 non-resident fishing license buyers. There were no known criteria for determining which anglers would be most likely to hire a guide.
- Outfitters: 260 outfitters were included in the contact list which represented all the outfitters for whom an email address was available.

Fielding

The outfitters survey was fielded in March of 2024 to a total of 260 outfitters. The first invite sent to 254 outfitters on March 1, 2024 followed by three reminders, the last of which went out on March 18. A final invite was sent on April 9 to six outfitters who were late additions to the contact list. In total, 81 outfitters fully completed the survey for a response rate of 31%.

Table 1. Sample Size and Response Rate for Outfitters Survey.

	Outfitters
Total emails sent	260
Total completes	81
Response rate	31.2%

The hunter and angler survey began fielding online on May 8, 2024 with an initial email invite to 10,000 nonresident hunters and anglers after they received an advance mailed postcard the week before. This was followed by five reminders, the last of which was sent on June 7. The survey received a total of 2,146 completed responses for a 22% response rate (Table 2). The response rate was 24% among hunters vs. only 11% among anglers.

Table 2. Sample Size and Response Rate for Hunter & Angler Survey.

	Hunting	Fishing	Total
Total emails sent	8,000	2,000	10,000
Total completes	1,925	221	2,146
Response rate	24.1%	11.1%	21.5%

The survey was fielded by Southwick Associates using the Qualtrics online survey platform. Licensed nonresident hunters were contacted via their email address on record with the New Mexico Department of Game and Fish. Once the survey was closed, data was reviewed and cleaned of outlier responses and others that showed respondents may have rushed or not provided careful thought.

Spending Estimates

The hunter and angler surveys had a series of questions that asked respondents how much they spent on outfitters (if applicable), travel to and within New Mexico, and equipment and other spending within New Mexico that was directly related to their hunting or fishing activities. Answers to these questions were used to develop per hunter/angler spending profiles. The one exception was the amount spent on hunting/fishing licenses which were based on license records rather than self-reported values.

Total spending amounts were estimated by multiplying the average amount spent per hunter/angler by the total number of guided hunters/anglers from New Mexico's license records. Amounts spent on outfitters fees were allocated to more detailed categories using the results of the outfitters survey that revealed their typical expenses. Detailed spending breakouts are provided in Appendix A.

Economic Impact Modeling

The economic impact of the estimated spending by guided hunters and anglers were calculated using the IMPLAN input-output model for the state of New Mexico. We report five measures of economic contribution in this study:

- **Jobs:** the number of people whose employment is supported by the spending.
- **Salaries & Wages:** besides salaries and wages paid to workers, this also includes proprietary income received by business owners.
- **Value Added:** the amount contributed to New Mexico's GDP.
- **Total Output:** the total multiplier effect of the spending as it passes through the New Mexico economy.
- **State & Local Tax Effects:** The amount of state and local tax revenue generated by all economic activity supported by the initial spending by nonresident guided hunters/anglers.

A more complete description of the economic modeling process can be found in Appendix B.

Spending & Economic Contributions

Detailed spending breakouts are provided in Appendix A.

Guided Hunting

Spending by Nonresident Hunters

- Nonresident guided hunters spent \$167.6 million in New Mexico in 2023. Payments to outfitters and guides made up 74% of their spending (\$123.9 million). Direct spending on trip-related goods and services totaled \$28.8 million or 17% of the total (Table 3).

Elk hunters accounted for 75% of total nonresident guided hunter spending or \$125.9 million (

- Figure 1).
- Elk hunters not only accounted for the majority of nonresident guided hunters (65%)¹, they also spent the most per hunter, on average \$12,000 each (Table 4).
- The spending by guided hunters included \$8.9 million in hunting license fees paid to New Mexico, \$27.5 million in fees paid to landowners under the EPLUS program², and \$8.7 million in gross receipts taxes paid by outfitters (Table 5).

Table 3. Direct Spending by Nonresident Guided Hunters in New Mexico.

	Elk	Pronghorn	Deer	Sheep	Other species	All guided hunting
Outfitter fees & tips	\$96,074,737	\$7,310,837	\$8,900,461	\$1,807,135	\$9,838,175	\$123,931,345
Trip related expenses*	\$18,731,818	\$2,367,853	\$2,559,563	\$547,865	\$4,573,493	\$28,780,592
Equipment	\$7,377,460	\$770,703	\$1,381,468	\$147,142	\$163,882	\$9,840,655
Other expenses	\$3,754,897	\$161,327	\$344,568	\$32,992	\$753,237	\$5,047,021
Total spent in New Mexico **	\$125,938,912	\$10,610,719	\$13,186,059	\$2,535,135	\$15,328,788	\$167,599,613

* Includes half of airfare to get to New Mexico.

** Spending received by businesses out of state for travel to New Mexico, for airfare, care rental, and fuel are excluded except where noted above.

¹ See Table 11 in Appendix A.

² Unguided hunters also directly paid \$3.4 million to landowners for EPLUS permits for a total of \$30.8 million.

Figure 1. Nonresident Guided Hunter Spending by Species.

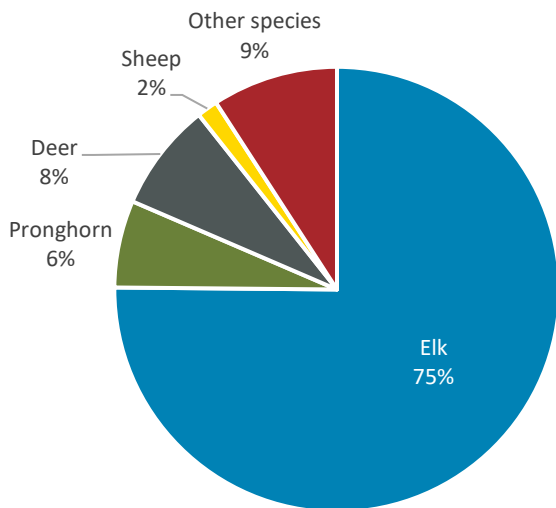


Table 4. Nonresident Guided Per Hunter Spending.

	Elk	Pronghorn	Deer	Sheep	Other species	All guided hunting
Outfitter fees & tips	\$9,154	\$4,620	\$4,864	\$5,242	\$5,081	\$7,656
Trip -related expenses*	\$1,785	\$1,496	\$1,399	\$1,589	\$2,362	\$1,778
Equipment	\$703	\$487	\$755	\$427	\$85	\$608
Other expenses	\$358	\$102	\$188	\$96	\$389	\$312
Total spent in NM	\$11,999	\$6,706	\$7,207	\$7,353	\$7,917	\$10,353

* Half of airfare paid to visit New Mexico is included considering ground operations and services in the arrival city.

Table 5. License Fees, EPLUS Payments to Landowners, & Gross Receipts Taxes.

	Elk	Pronghorn	Deer	Sheep	Other species	All guided hunting
License fees paid to state*	\$5,835,434	\$572,890	\$738,083	\$207,617	\$1,516,444	\$8,870,467
Payments to landowners for EPLUS permits **	\$30,839,848	N/A	N/A	N/A	N/A	\$30,839,848
Gross receipts taxes paid by outfitters	\$6,428,123	\$567,686	\$716,047	\$145,399	\$822,216	\$8,679,471

* Includes direct spending by hunters and spending by outfitters on behalf of clients.

** Include EPLUS permits purchased by nonresidents directly from landowners.

Economic Contributions from Nonresident Hunters

Table 6 shows the economic contributions generated by the \$167.6 million in spending by nonresident guided hunters in New Mexico in 2023. As these dollars entered the economy, they traveled from hand to hand, business to business thereby supporting jobs, tax revenues and other important additions to New Mexico’s economy as described in Appendix B. Specifically, in 2023 guided nonresident hunters:

- Supported 6,816 full- and part-time jobs. Elk hunters supported 79% (5,395) of these jobs.
- Contributed \$125.4 million in salaries and wages.

- Added \$161.1 million to New Mexico's GDP.
- Resulted in \$217.2 million in total economic output.
- This economic output generated \$7.5 million in state and local taxes.

As shown in Table 6, given nonresident elk hunters contributed the most dollars to New Mexico's economy, the economic impacts from elk were also the largest compared to other frequently targeted species. After elk, the next species with the greatest impact was deer followed closely by pronghorn.

Table 6. Economic Contributions of Nonresident Guided Hunting in New Mexico.

	Elk	Pronghorn	Deer	Sheep	Other species	All guided hunting
Direct spending	\$125,938,912	\$10,610,719	\$13,186,059	\$2,535,135	\$15,328,788	\$167,599,613
Jobs	5,395	397	448	87	489	6,816
Salaries & wages	\$98,375,738	\$7,354,467	\$8,575,594	\$1,654,709	\$9,475,254	\$125,435,762
Value added (GDP contribution)	\$124,814,152	\$9,777,517	\$11,425,869	\$2,198,782	\$12,889,639	\$161,105,958
Total output (or multiplier effect)	\$166,669,269	\$13,246,082	\$15,885,465	\$3,026,844	\$18,414,535	\$217,242,195
State & local tax effects	\$5,771,823	\$422,692	\$557,341	\$108,152	\$673,733	\$7,533,742

Guided Fishing

Spending by Nonresident Anglers

Nonresident guided anglers spent \$64.9 million in New Mexico in 2023 (Table 7), second only to elk hunting. Payments to outfitters and guides made up 49% of this amount (\$31.9 million) and trip related expenses made up 44% (\$28.7 million). This included over \$1 million for fishing licenses. On a per-trip basis, guided anglers spent \$2,463 per person per trip in New Mexico and paid guides and outfitters \$1,212 on average (Table 8). Of the total paid to outfitters by nonresident anglers, \$2.3 million in gross receipts taxes were then paid to the State and at least \$1 million for fishing licenses (Table 9).

Table 7. Direct Spending by Guided Nonresident Anglers in New Mexico.

	Total spending
Outfitter fees & tips	\$31,934,055
Trip related expenses	\$28,712,835
Equipment	\$3,086,175
Other expenses	\$1,173,543
Total spent in New Mexico *	\$64,906,608

* Spending received by businesses out of state for travel to New Mexico for airfare, car rental, and fuel are excluded.

Table 8. Nonresident Guided Per Angler Spending.

	Per angler spending
Outfitter fees & tips	\$1,212
Trip related expenses	\$1,089
Equipment	\$117
Other expenses	\$45
Total spent in New Mexico	\$2,463

Table 9. License Fees & Gross Receipts Taxes.

	Total spending
License fees paid to state	\$1,019,222
Gross receipts taxes paid by outfitters	\$2,372,232

Economic Contributions

Table 10 shows the economic contributions generated by guided nonresident anglers. Annual spending in New Mexico was \$64.9 million in 2023. As these dollars circulated through the state's economy, they created important contributions that benefited all state residents. Specifically, these benefits included:

- Supported 1,917 jobs.
- Generated \$42.7 million in salaries and wages.
- Contributed \$60.2 million to New Mexico's GDP.
- Generated \$89.2 million in total economic output.
- Generated \$4.5 million in state and local taxes.

Table 10. Economic Contributions of Nonresident Guided Fishing in New Mexico.

	All guided fishing
Direct spending	\$64,906,608
Jobs	1,917
Salaries & wages	\$42,718,983
Value added	\$60,152,149
Total output	\$89,150,479
State & local tax effects	\$4,452,128

General Survey Results

Hunters

Besides questions about spending on their hunting trips to New Mexico, hunters were also asked about their hunting activity, satisfaction with the guided experience, as well as demographic questions about themselves. Key takeaways from these questions are as follows:

95% percent of nonresident hunters and anglers went hunting (Not all nonresidents who purchased a 2023 New Mexico hunting license went hunting that year. Figure 3 shows whether or not they actually hunted, over two-thirds had previously visited New Mexico to hunt, indicating a high level of loyalty across visiting hunters and anglers to New Mexico.

- Figure 3).
- Nonresidents' primary reason for not hunting after purchasing a hunting license was the inability to acquire a tag to hunt their preferred species (41%). This was followed by 39% who said their plans unexpectedly changed (Figure 4).
- Elk hunters made up 82% of all nonresident guided hunters followed by 14% who hunted mule deer (Figure 11). For both species, visitors on average hunted for four days with a guide (Figure 12).
- Just over a third of nonresident hunters surveyed stayed extra nights in New Mexico to do other things besides hunt (Figure 14). The number one activity they participated in was sightseeing (69%) (Figure 15).

65% said they would not visit New Mexico if they were not able to hunt (

Hunting is a major draw for tourists to New Mexico. Roughly two-thirds of visiting hunters would not bring their dollars to the state if they were unable to hunt (Figure 16). Figure 18 shows two-thirds of New Mexico's nonresident hunters would not visit if guide and outfitter services were not available. Increasing their odds of securing a permit, tapping into the guide's expertise and gaining access to places to hunt are the top reasons for hiring outfitters and guides (Figure 19). Figure 20 shows outfitters and guides are providing high levels of service to their clients.

- Figure 16).

68% of guided hunters said they were at least somewhat unlikely to hunt in New Mexico if they could not hire a guide. 50% reported they were very unlikely to do so (

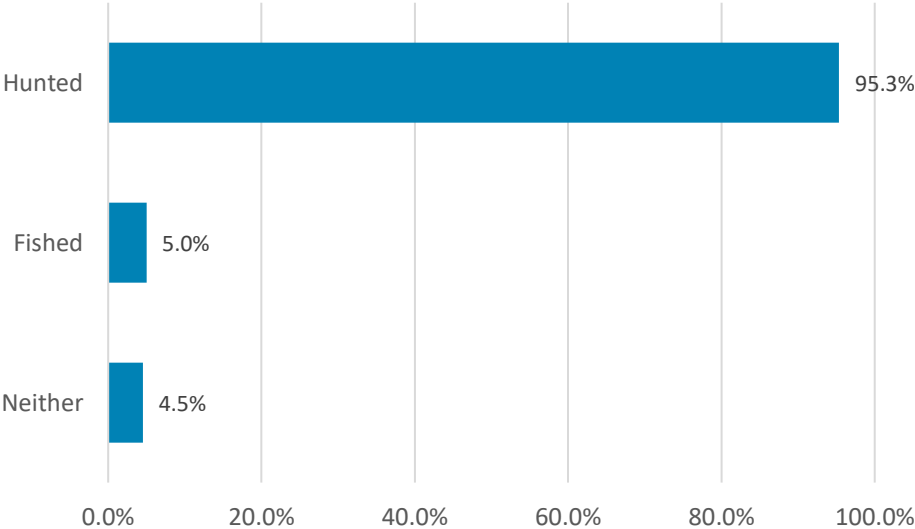
- Figure 18).
- The top three reasons for hiring an outfitter to hunt in New Mexico were: 1) Better odds of getting a license, 2) to benefit from the outfitter's expertise, and 3) to access land (Figure 19).

- Overall satisfaction with the guide experience was high, with 80% saying they were very satisfied and another 11% saying they were somewhat satisfied (Figure 20).
- Texas and Colorado are the top source of New Mexico’s nonresident hunters (Figure 25).

Full details regarding New Mexico’s nonresident hunters are in the following tables.

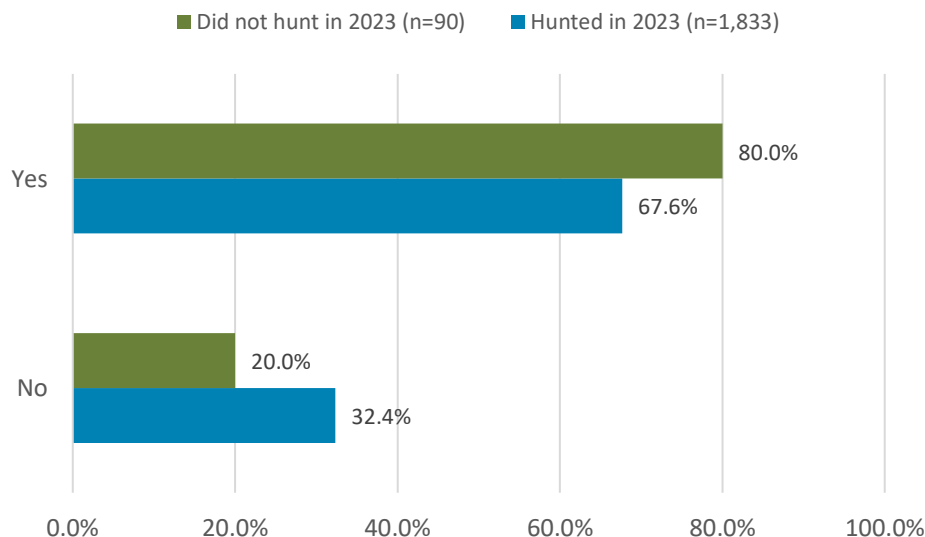
Very few nonresident hunters also fished while in New Mexico.

Figure 2. Did you hunt or fish in New Mexico in 2023?



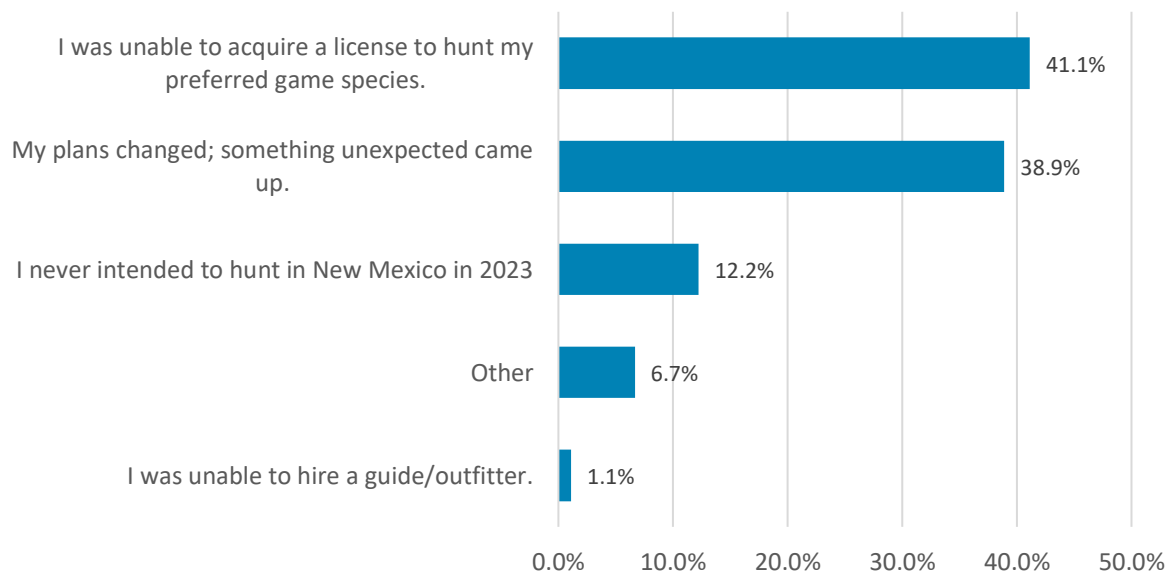
Not all nonresidents who purchased a 2023 New Mexico hunting license went hunting that year. Figure 3 shows whether or not they actually hunted, over two-thirds had previously visited New Mexico to hunt, indicating a high level of loyalty across visiting hunters and anglers to New Mexico.

Figure 3. Have You Hunted in New Mexico Prior to 2023?



Of those nonresident hunting license purchasers who did not hunt, the top reason for not doing so was the inability to secure the required permits (Figure 4).

Figure 4. Reason for not hunting in 2023.



Though one would expect most nonresidents would only make one trip to New Mexico to hunt once in a given year. However, Figure 5 shows over 15% visited New Mexico more than once in 2023.

Figure 5. Number of trips to New Mexico to hunt in 2023.

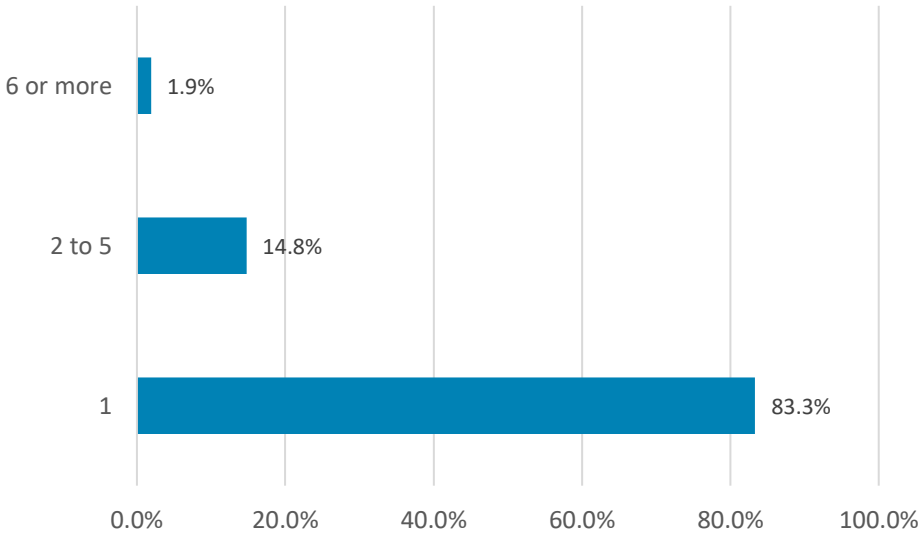


Figure 6 shows the duration of the typical nonresident hunting trip to New Mexico. The significant number of days per trip helped increase the average spent by each visiting hunter. Figure 7 shows visiting hunters may only hunt roughly half of the days spent in New Mexico.

Figure 6. Number of days spent in New Mexico to hunt in 2023.

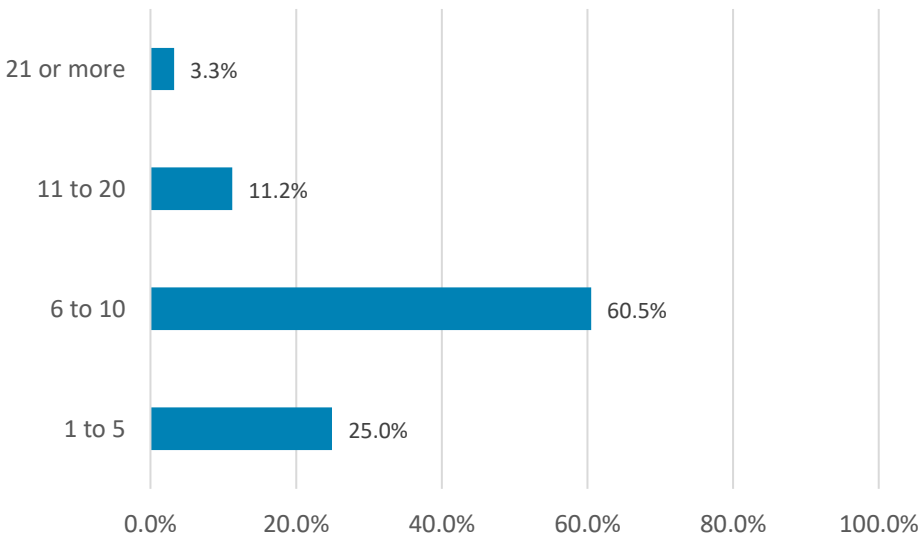
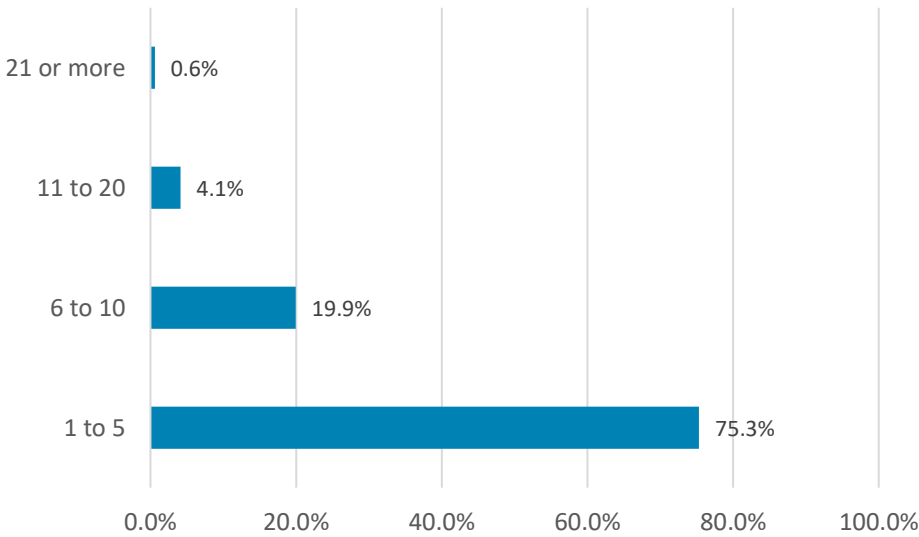


Figure 7. Number of days actually spent hunting in New Mexico in 2023.



Elk followed by mule deer are the top targets for visiting hunters (Figure 8). The small sample sizes for some species make it difficult to compare the average days nonresidents spend per trip targeting specific species (Figure 9).

Figure 8. Species hunted in New Mexico in 2023.

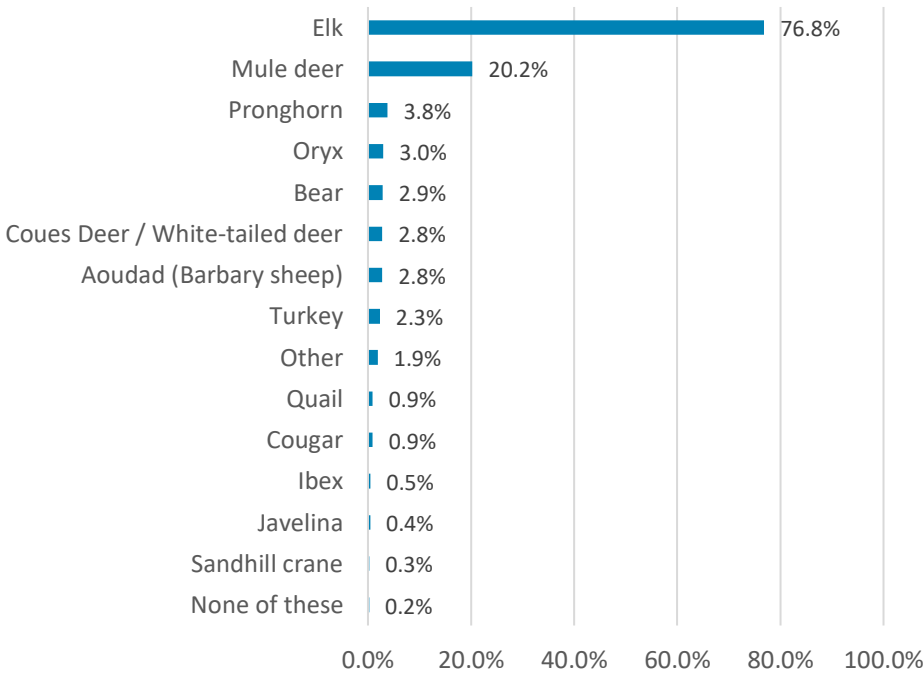
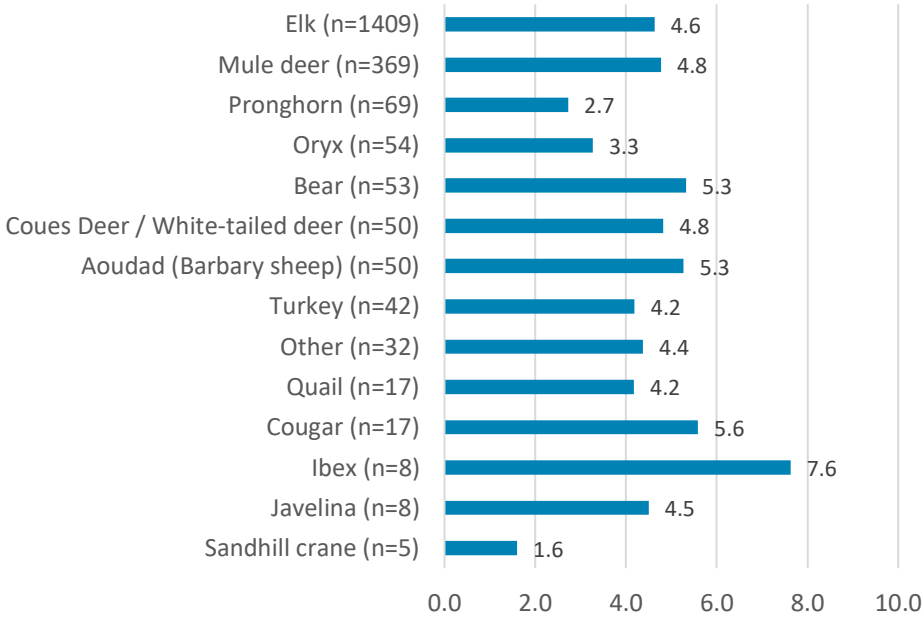


Figure 9. Average days spent hunting by species.



Just over three-quarters of nonresident hunters in New Mexico hired a guide or outfitter (Figure 10). Figures 11 and 12 show which species were most frequently targeted by guided nonresident hunters, with elk the top species, and the days spent pursuing each species, respectively. Please note the low sample sizes for many species (<40), meaning the results must be used with caution for these species.

Figure 10. Hired an outfitter to hunt in New Mexico in 2023?

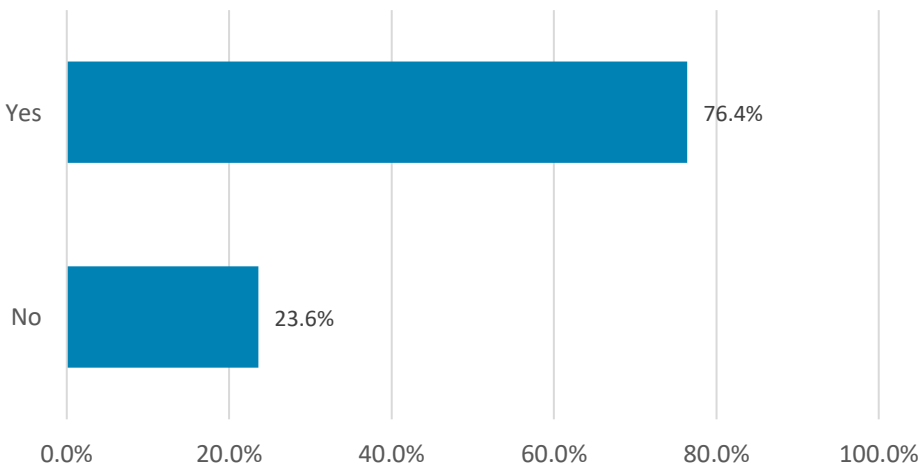


Figure 11. Species hunted with a guide or outfitter.

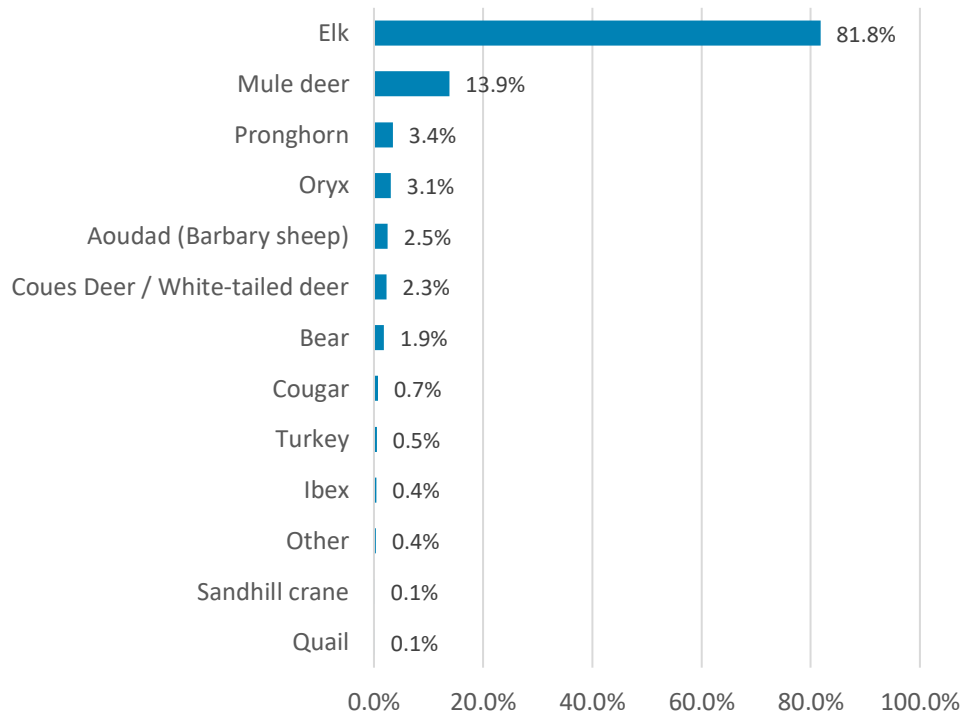
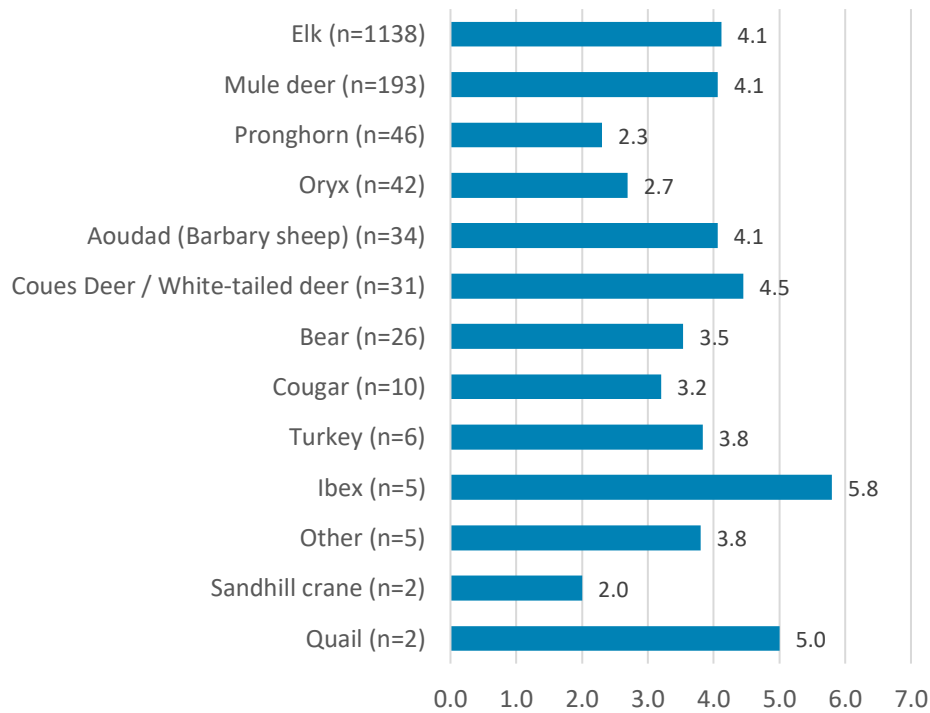
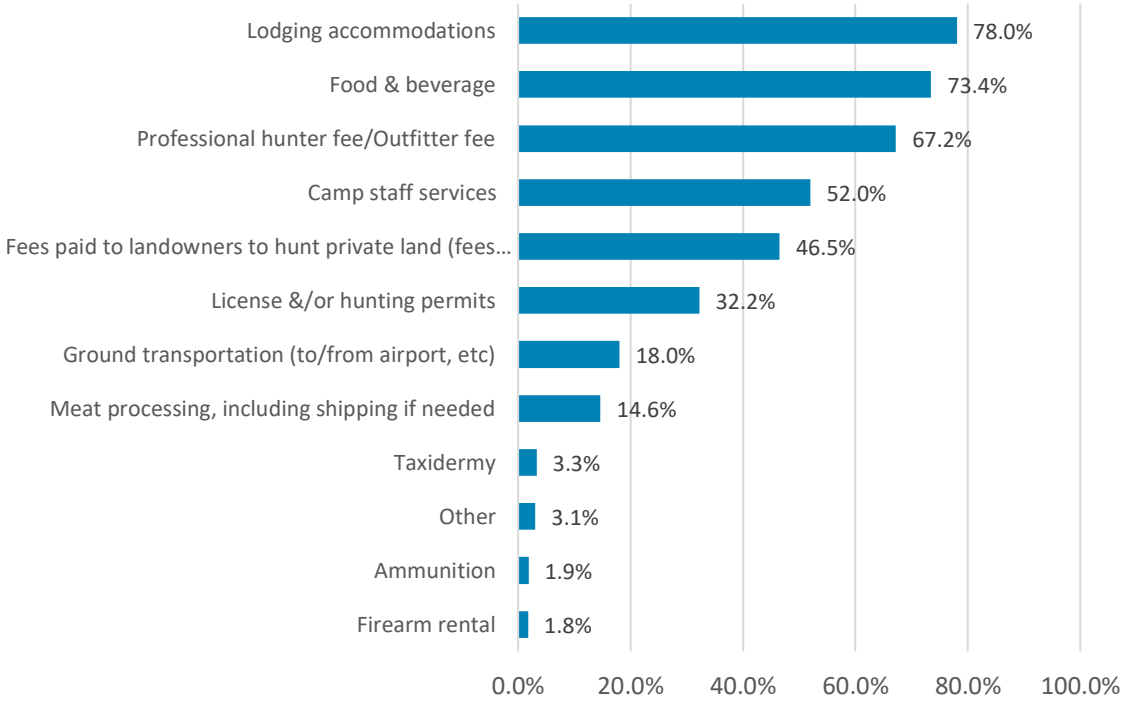


Figure 12. Days spent hunting with a guide by species.



The services used by guided nonresident hunters vary based on each guide and outfitter, hunters' preferences and the species targeted (Figure 13).

Figure 13. Services included as part of outfitter fees.



Beyond just hunting, over one-third of nonresident hunters spend additional days doing other activities on their New Mexico hunting trip (Figure 14). Figure 15 shows sightseeing is their top other activity.

Figure 14. Hunters who spent extra nights in New Mexico to pursue other activities.

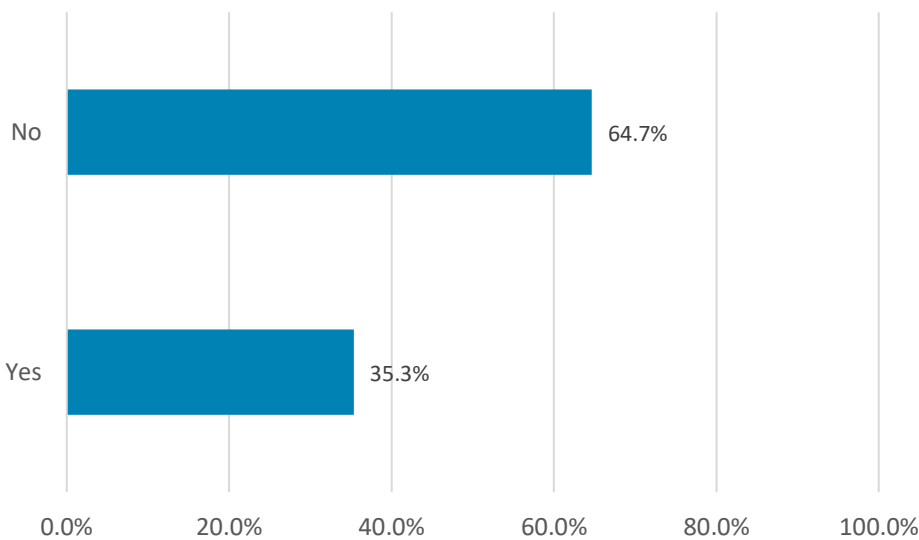
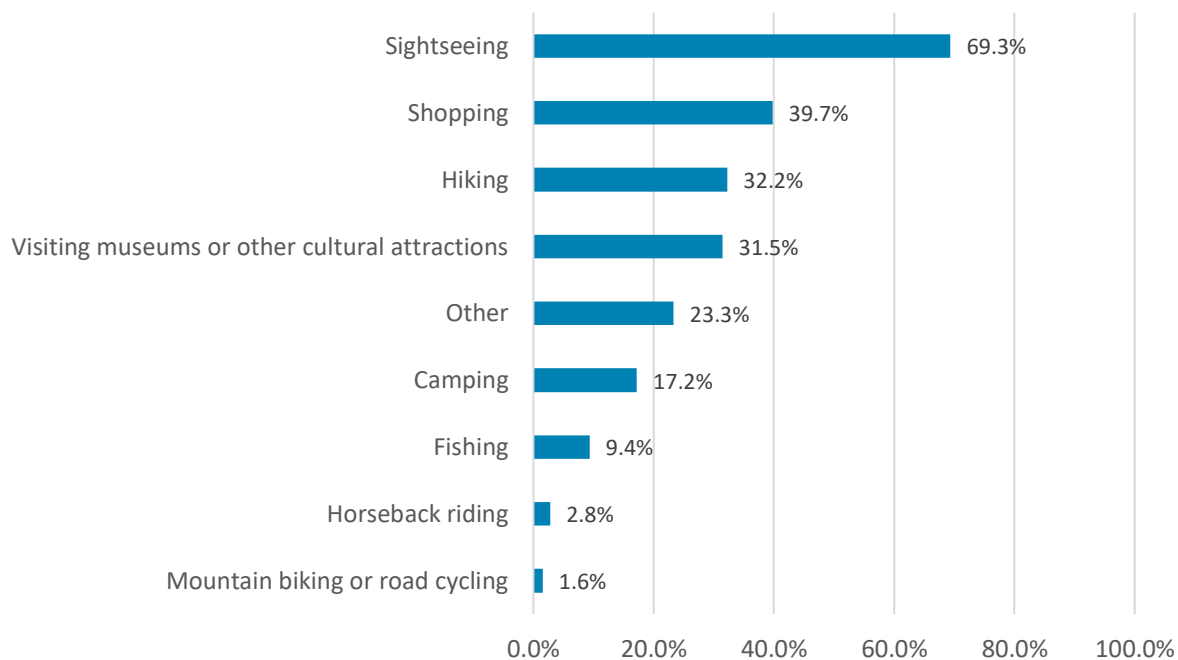


Figure 15. Activities engaged while in New Mexico other than hunting.



Hunting is a major draw for tourists to New Mexico. Roughly two-thirds of visiting hunters would not bring their dollars to the state if they were unable to hunt (Figure 16). Figure 18 shows two-thirds of New Mexico’s nonresident hunters would not visit if guide and outfitter services were not available. Increasing their odds of securing a permit, tapping into the guide’s expertise and gaining access to

places to hunt are the top reasons for hiring outfitters and guides (Figure 19). Figure 20 shows outfitters and guides are providing high levels of service to their clients.

Figure 16. Would you have visited New Mexico even if you were unable to hunt?

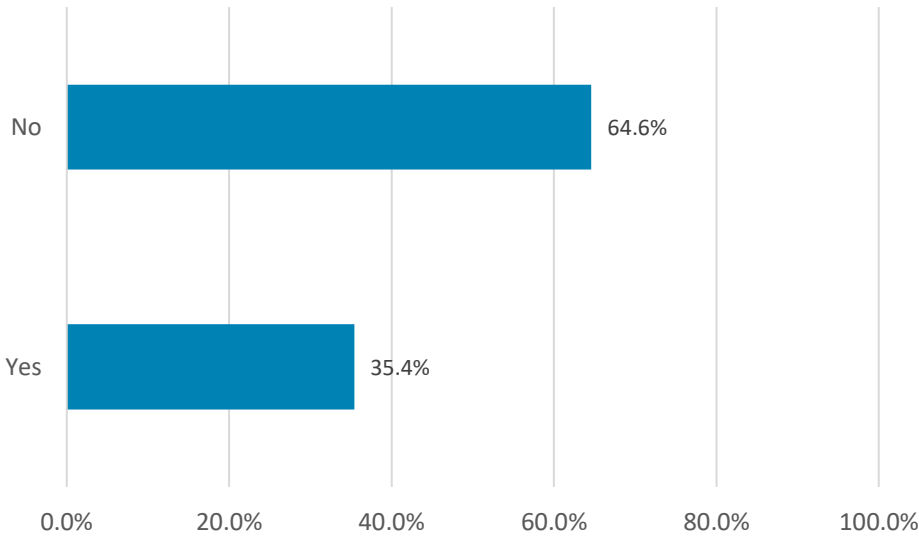


Figure 17. Other people who accompanied hunter to New Mexico.

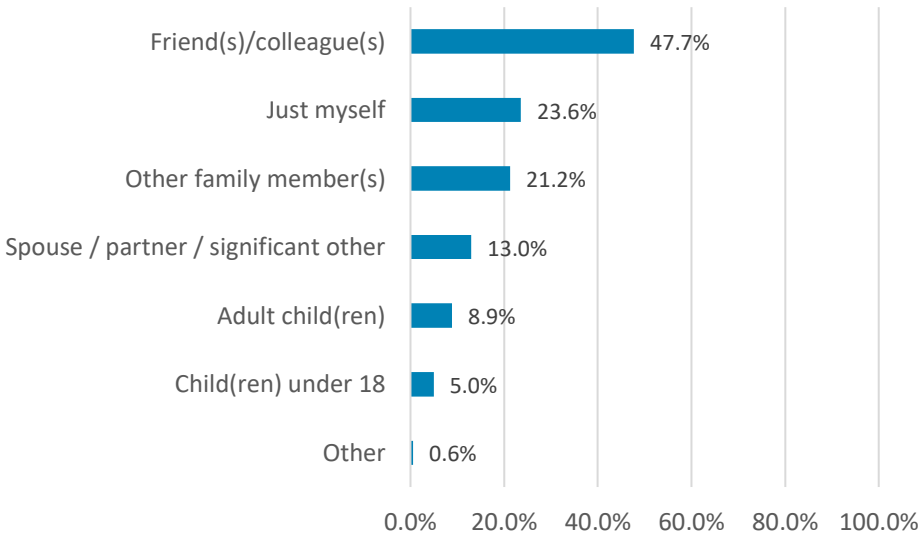


Figure 18. Likelihood of hunting in New Mexico if hunter couldn't hire a guide.

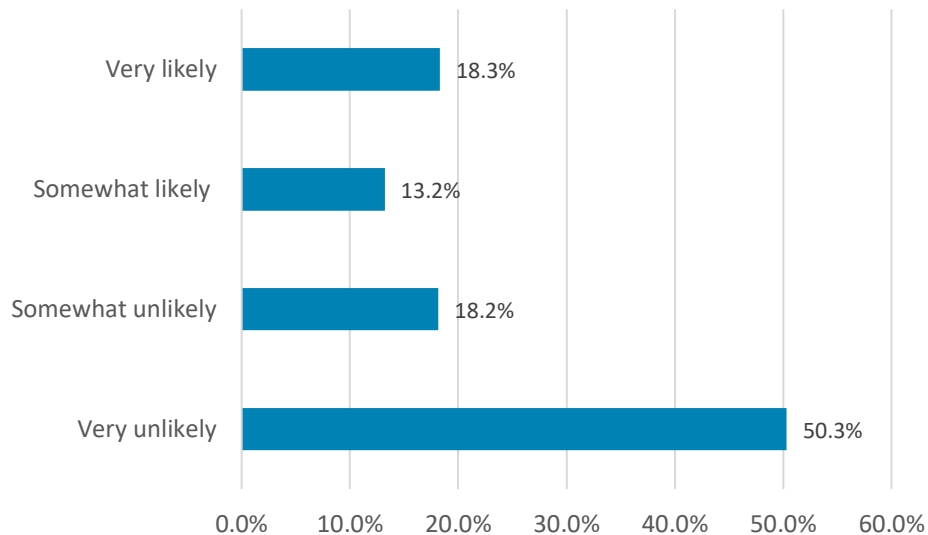


Figure 19. Reasons for hiring an outfitter to hunt in New Mexico.

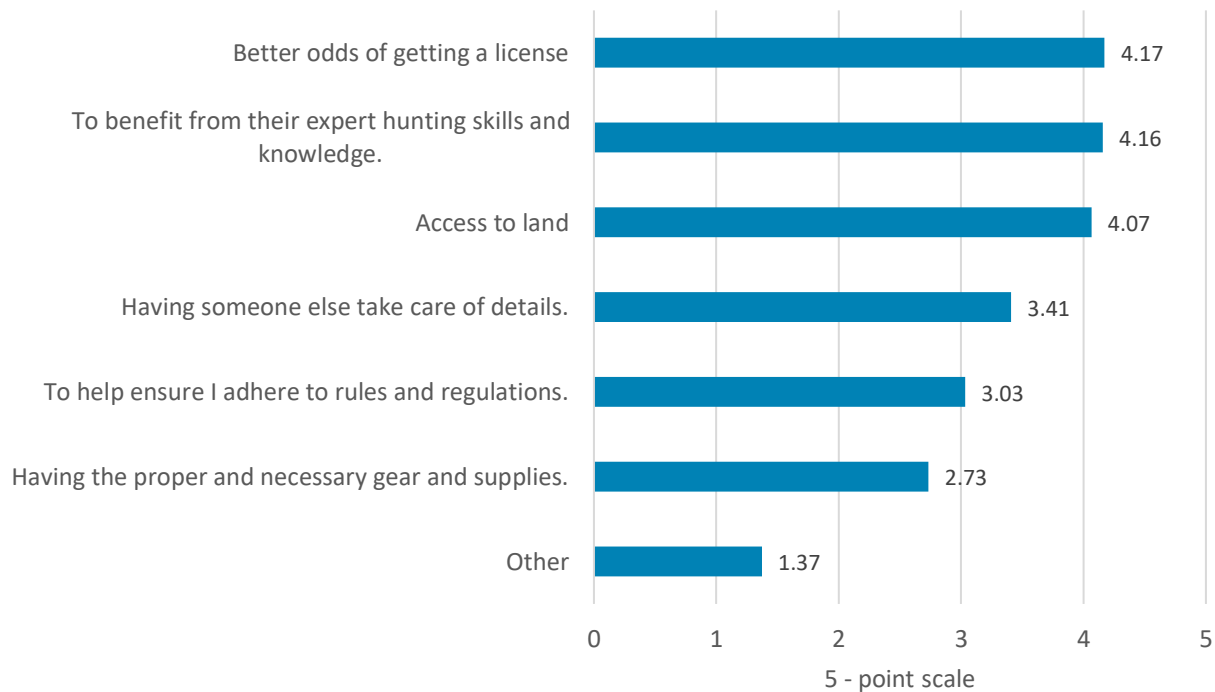
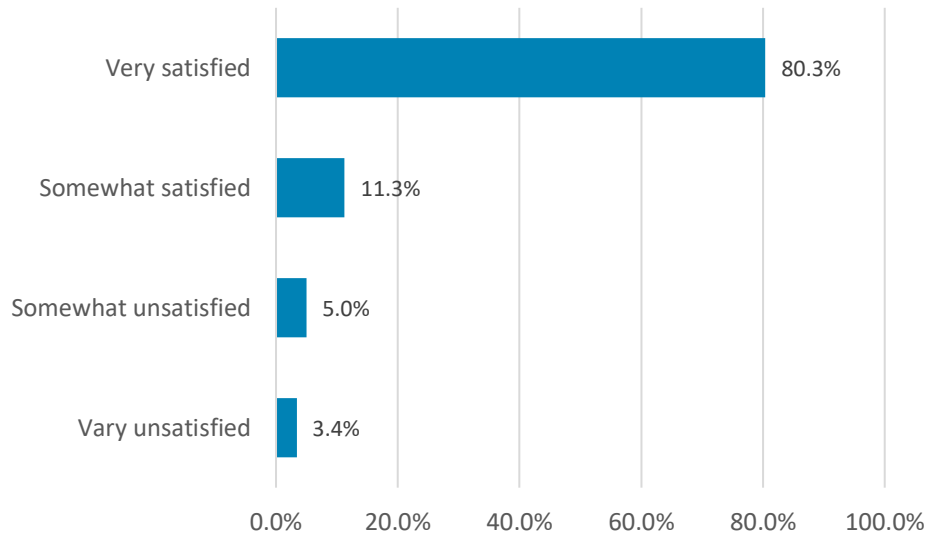


Figure 20. Satisfaction with guide and outfitter.



Nonresident Hunters Demographics

While the significant majority of nonresident hunters are male (Figure 21) with high income (Figure 23), they have a fairly wide age distribution (Figure 22).

Figure 21. Gender.

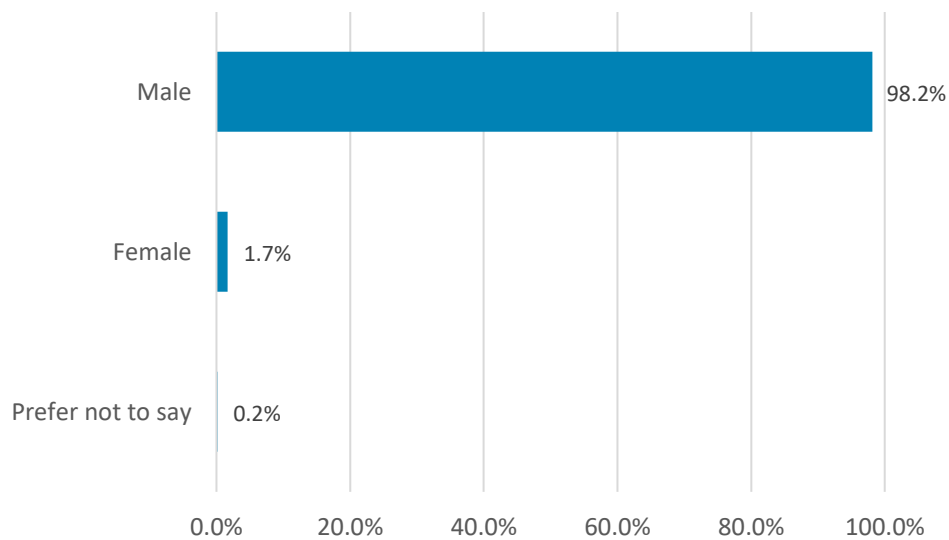


Figure 22. Age.

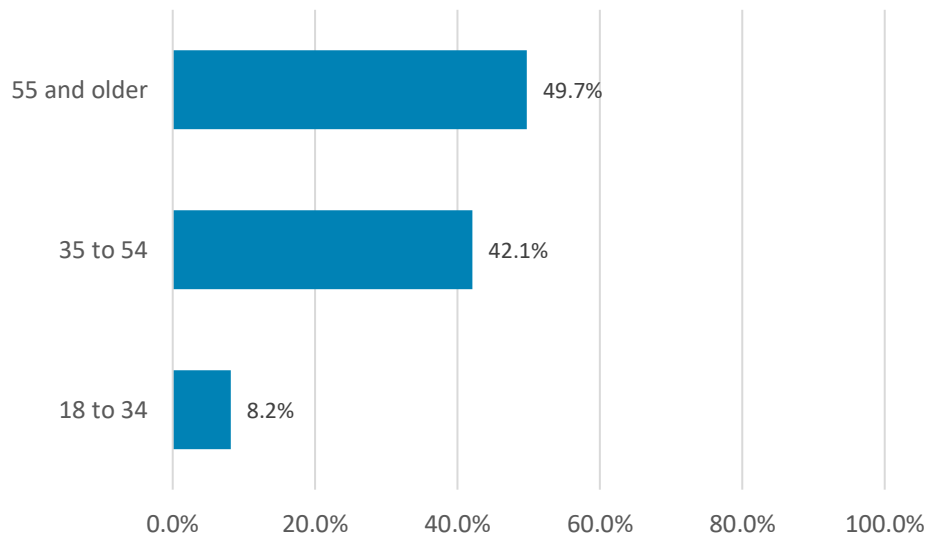
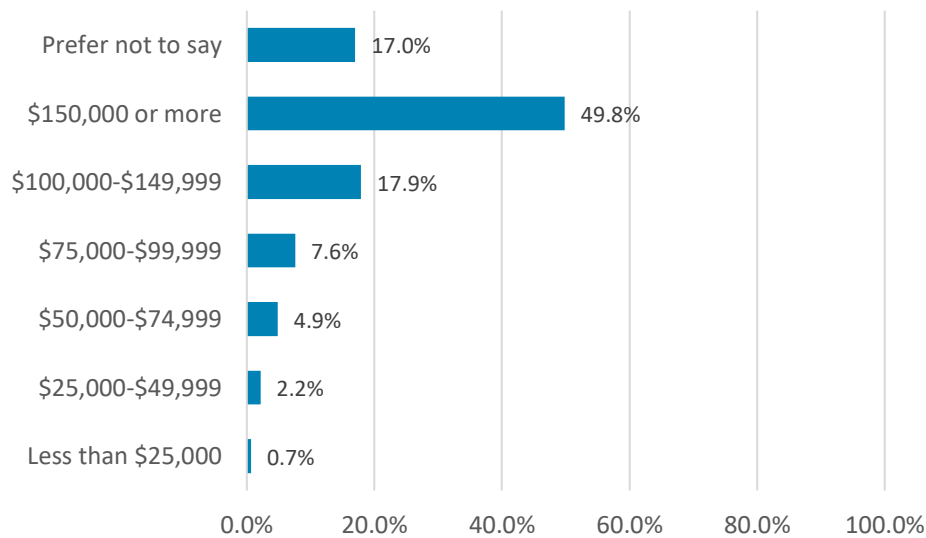


Figure 23. Household income.



Most visiting hunters are white and come from neighboring states Texas and Colorado.

Figure 24. Race/ethnicity.

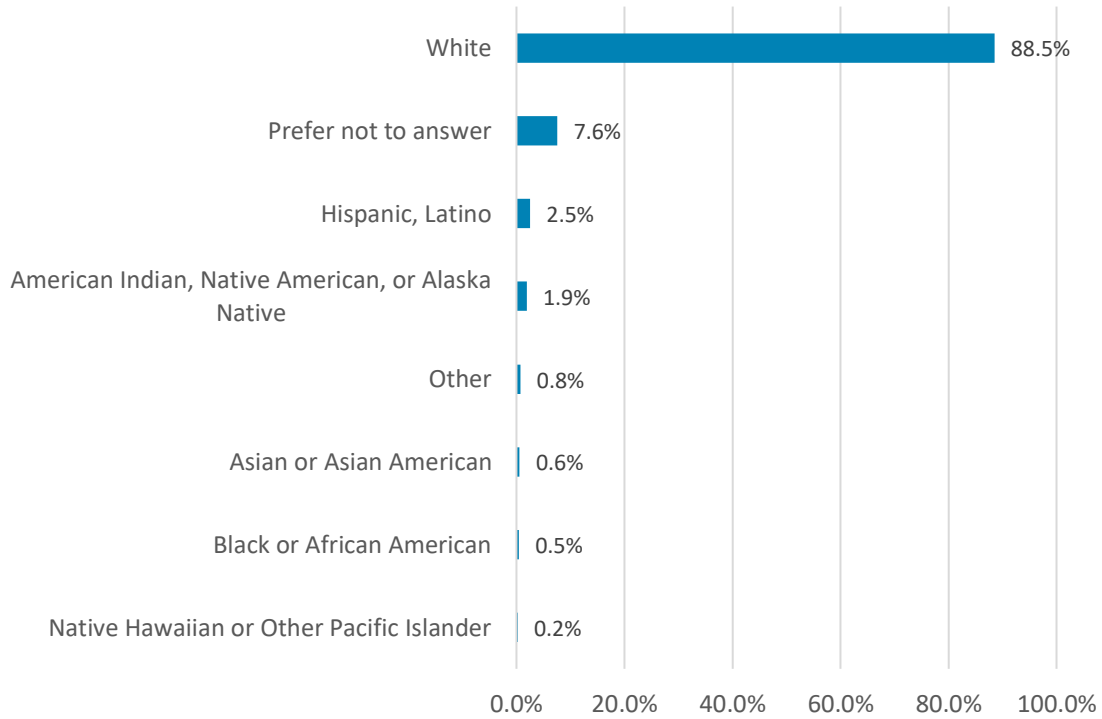
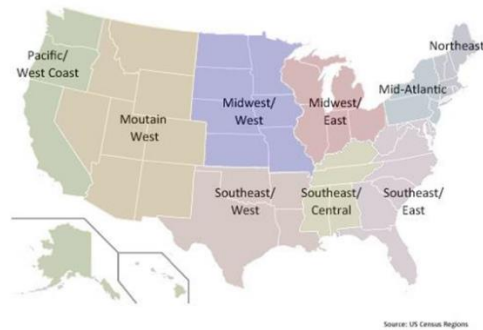
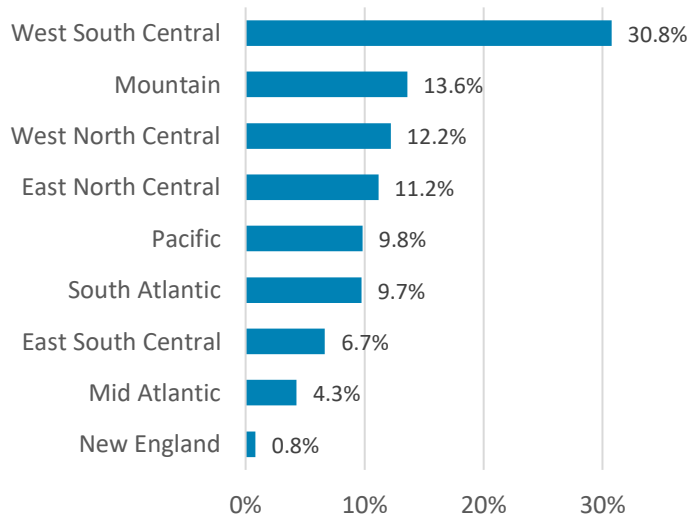


Figure 25. Region of residence.



Anglers

Besides questions about spending on their fishing trips to New Mexico, nonresident anglers were also asked about their fishing activity, satisfaction with the guided experience, as well as demographic questions. Since the angler sample was not overly skewed towards guided anglers, as the hunting sample was, more can be said about the differences between guided vs unguided anglers. Key insights include:

41% of nonresident anglers said they hired a guide or outfitter to fish in New Mexico in 2023 (Four in ten of New Mexico's nonresident anglers hired a guide in 2023 (Figure 32). On average, 70% fished one to five days with a guide on their New Mexico trip (Figure 33). The San Juan and the Rio Grande were the top rivers for guided fishing trips by nonresident anglers (Figure 34).

- Figure 32). This may be overstated since the introduction to the survey mentioned guided hunting and fishing. However, it still leaves enough unguided anglers to make comparisons.
- Compared to unguided nonresident anglers, nonresident guided anglers in New Mexico were:
 - More likely to travel from further away, with 32% coming from outside the Mountain, Pacific, and Southwest Central regions compared to only 14% of unguided anglers (Figure 46).
 - From higher income groups with 72% having household incomes of \$100,000 or more compared to 48% of unguided anglers (Figure 44).
 - Older, with 73% being 55 or older compared to 61% of unguided anglers (Figure 43).

Less likely to spend extra nights in New Mexico to do other things besides fish, which could be due to the greater travel distance. Only 44% said they stayed extra nights compared to 60% of unguided anglers (Unguided nonresident anglers were more likely to spend extra nights in New Mexico (Figure 36.) Sightseeing was the most common additional activity engaged on their trips (Figure 37), but please be careful in interpreting the differences between anglers who used guides or not based on the small sample sizes.

- Figure 36).

The number one river fished by guided anglers was the San Juan at 69%. Second was the Rio Grande at only 10% (

- Figure 34).
- Just under 30% of guided nonresident anglers fished for more than 5 days (Figure 33).
- Guided nonresident anglers were universally satisfied with their guided experience with 97.5% saying they were very satisfied and the remaining 2.5% somewhat satisfied (Figure 41).

The most important reason for hiring a guide was to benefit from their experience and expertise, followed by having necessary gear and supplies (

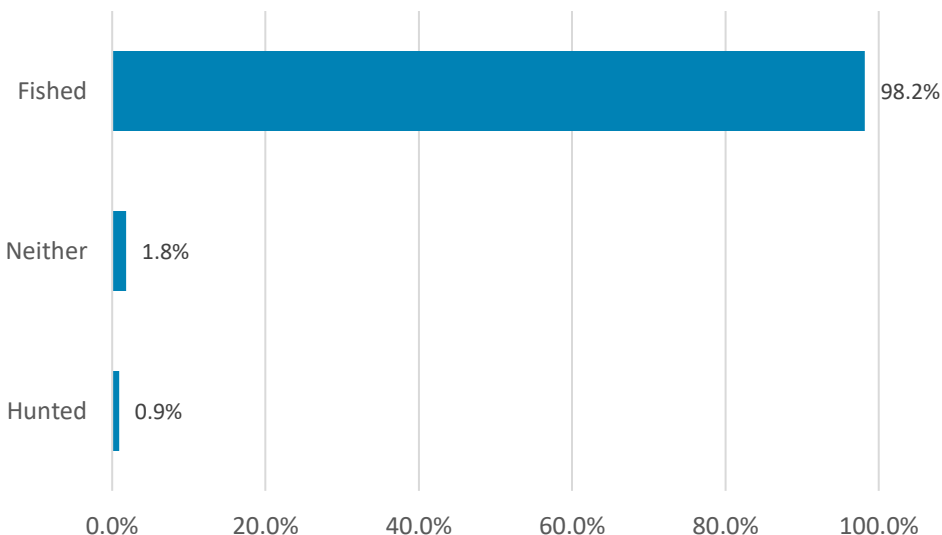
There are multiple reasons why people hire fishing guides. New Mexico's nonresident anglers report tapping into guides' fishing skills and knowledge as the top reason followed by having the proper and necessary gear to be successful fishing (Figure 40). Figure 41 shows 100% of all reporting nonresident anglers reported being somewhat or very satisfied with their guides, with 97.5% reporting being very satisfied.

- Figure 40).

The full details regarding New Mexico' nonresident anglers are in the following charts and tables.

Very few nonresident fishing license holders also hunted on their New Mexico trip (Figure 26).

Figure 26. Did you hunt or fish in New Mexico in 2023?



Like hunting, nonresident anglers tend to be fairly loyal in returning to New Mexico to fish again (Figure 27). Figure 28 shows roughly 40% of nonresident anglers will make more than one trip to New Mexico each year to fish while Figure 29 shows the wide range of days they typically stay per trip. Most will fish just five or fewer days per trip (Figure 30).

Figure 27. Fished in New Mexico prior to 2023.

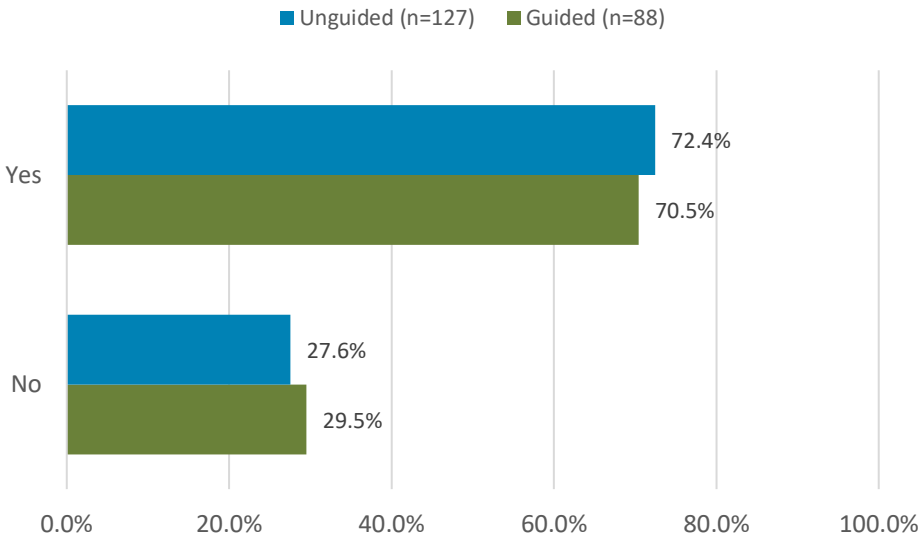


Figure 28. Number of trips taken to New Mexico in 2023 to fish.

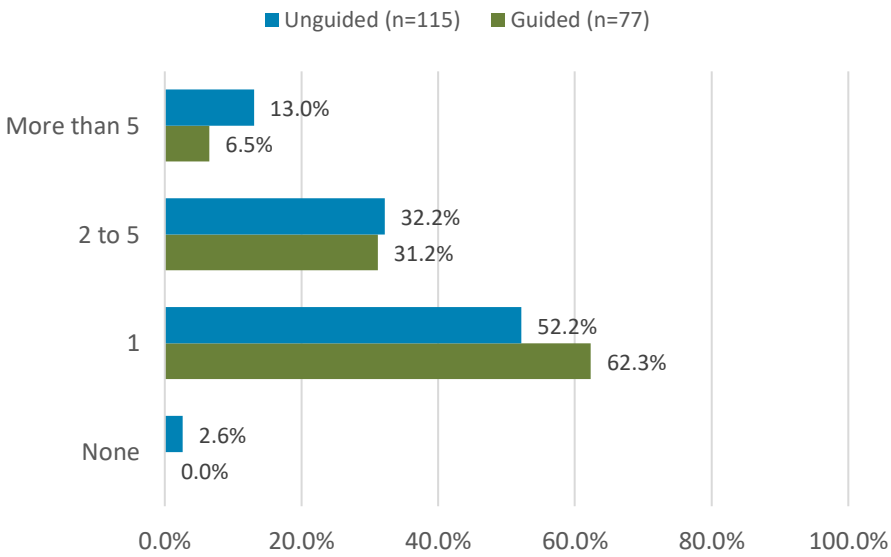


Figure 29. Total days spent in New Mexico during fishing trips in 2023.

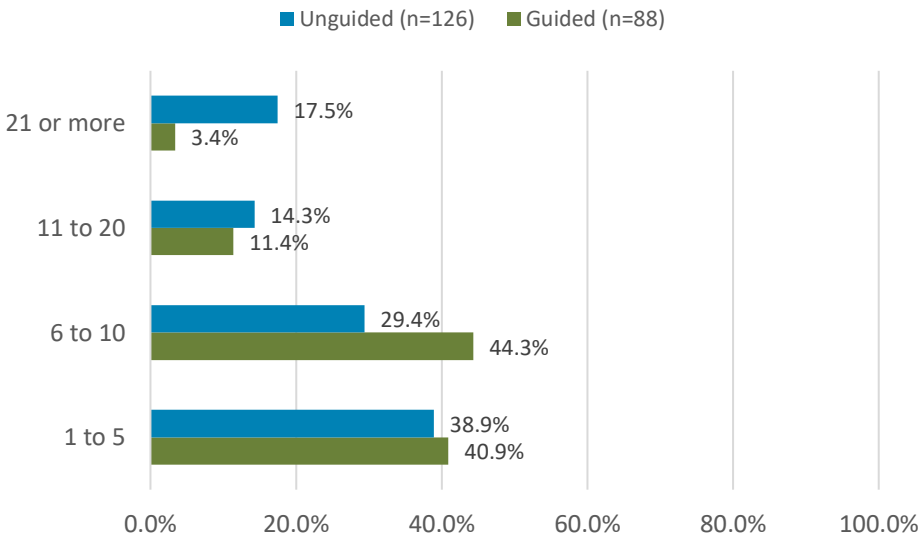
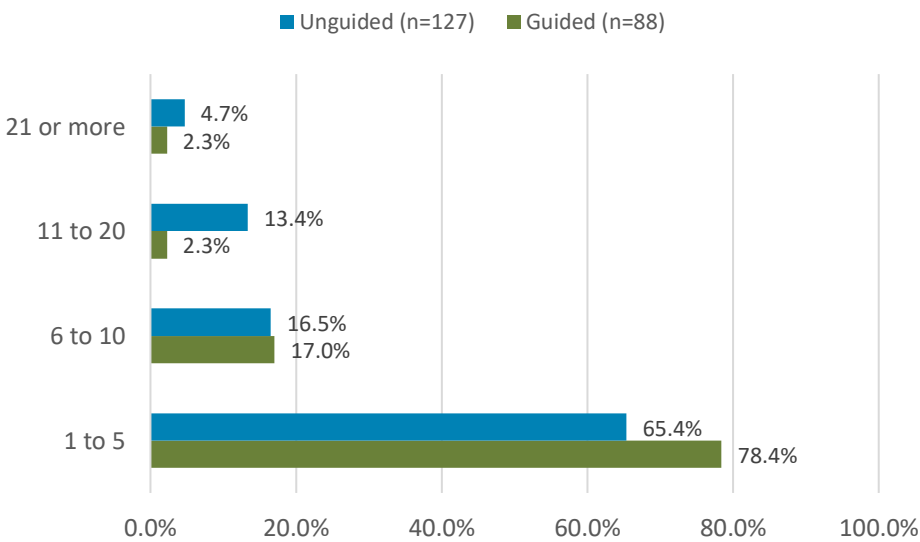
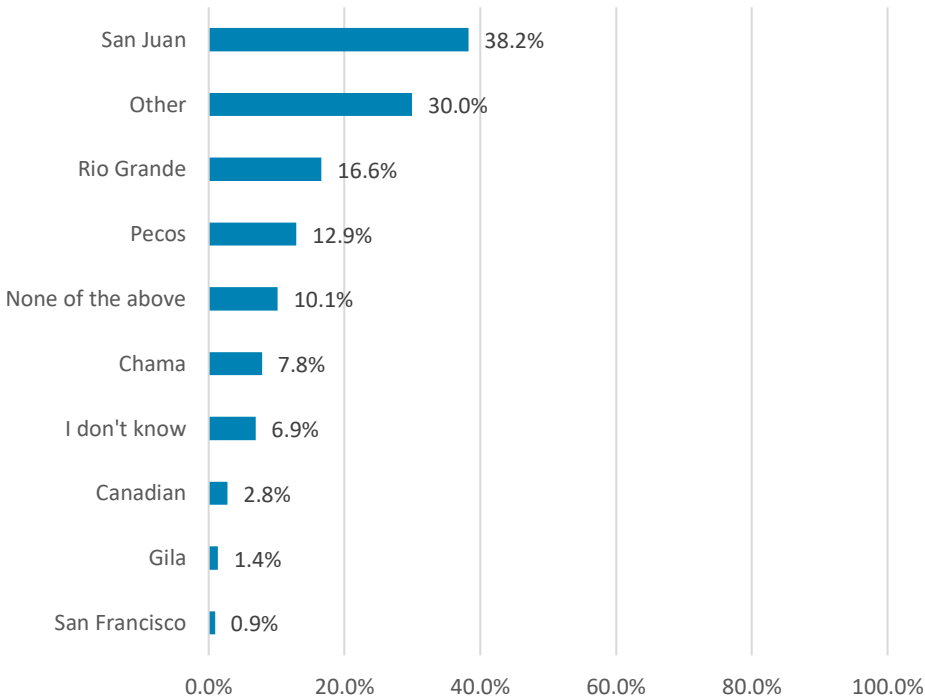


Figure 30. Days spent actively fishing in New Mexico in 2023.



Not surprisingly, the San Juan River is the top destination for nonresident anglers in New Mexico.

Figure 31. Rivers fished in New Mexico in 2023.



Four in ten of New Mexico’s nonresident anglers hired a guide in 2023 (Figure 32). On average, 70% fished one to five days with a guide on their New Mexico trip (Figure 33). The San Juan and the Rio Grande were the top rivers for guided fishing trips by nonresident anglers (Figure 34).

Figure 32. Hired a guide to fish in New Mexico in 2023?

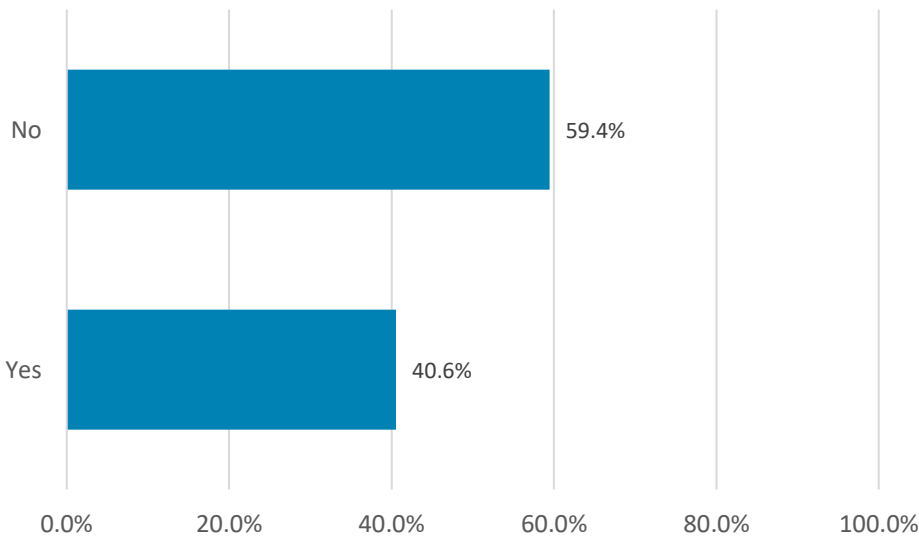


Figure 33. Days spent fishing with a guide in New Mexico in 2023.

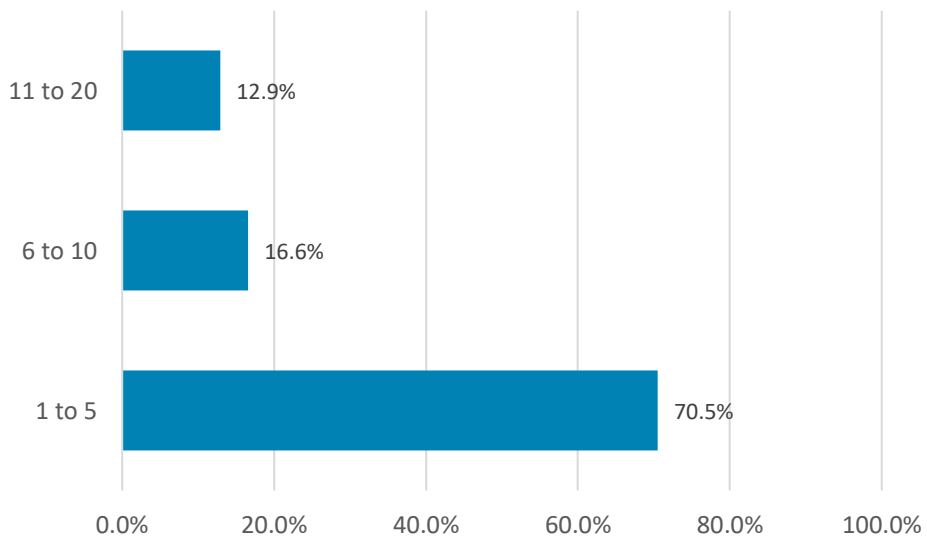
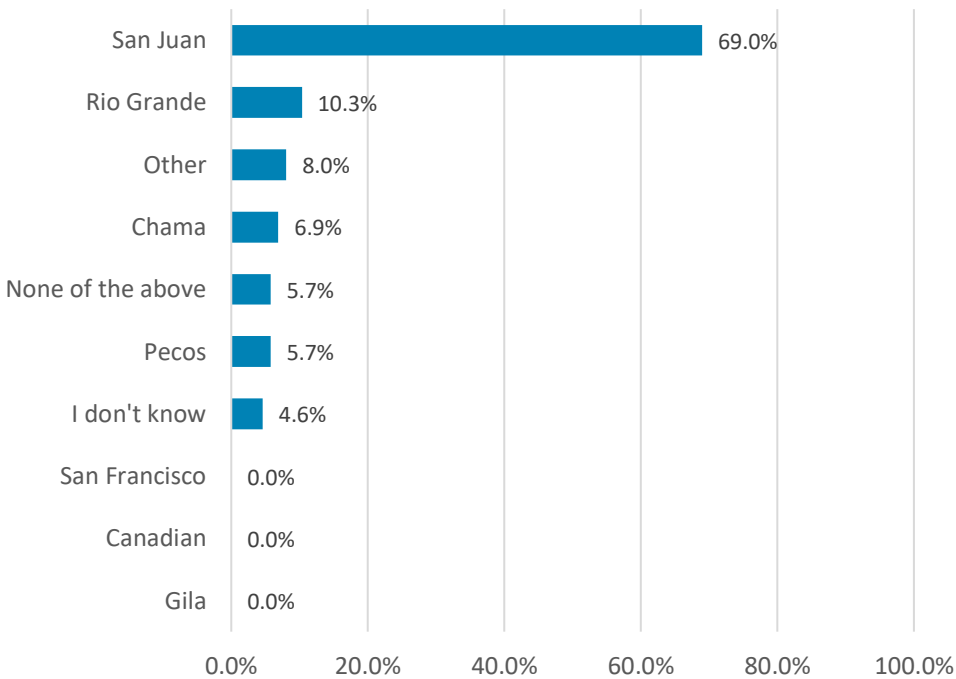
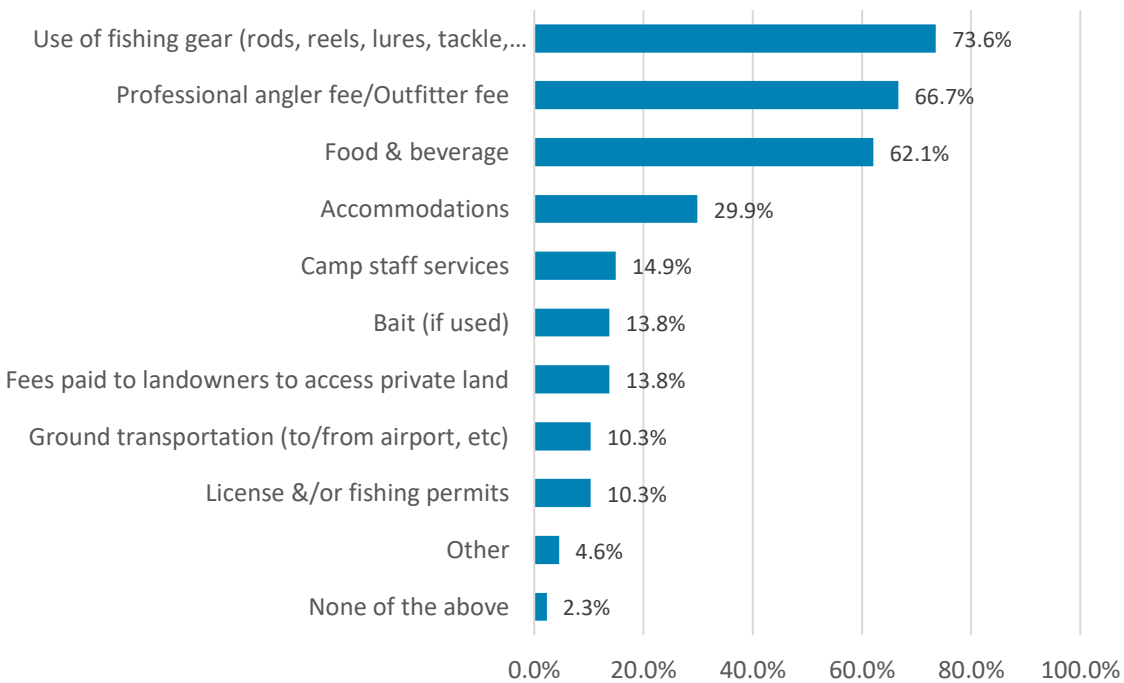


Figure 34. Rivers fished with a guide in New Mexico in 2023.



The services provided by guides and outfitters to nonresident anglers vary depending on the angler's specific needs, where they are fishing, time of the year and more. The most commonly cited service was the provision of fishing gear (Figure 35).

Figure 35. Services included as part of outfitter fee.



Unguided nonresident anglers were more likely to spend extra nights in New Mexico (Figure 36.) Sightseeing was the most common additional activity engaged on their trips (Figure 37), but please be careful in interpreting the differences between anglers who used guides or not based on the small sample sizes.

Figure 36. Spent extra nights in New Mexico for activities other than fishing.

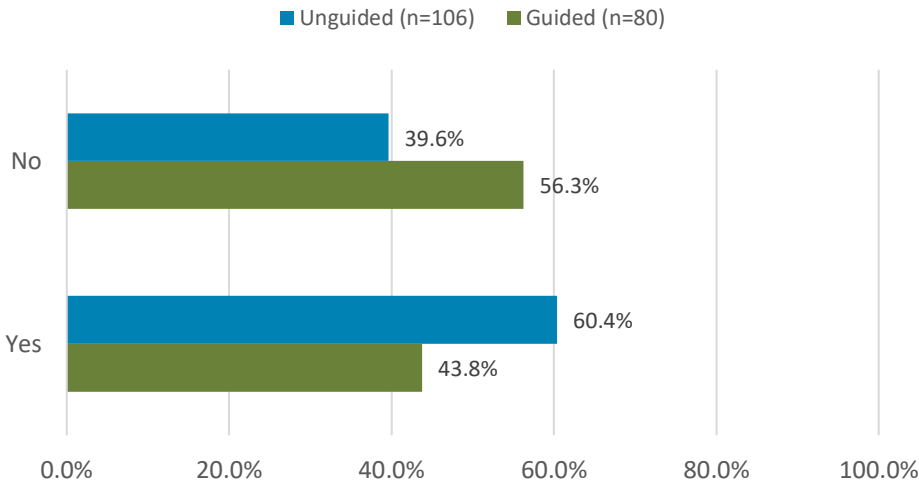
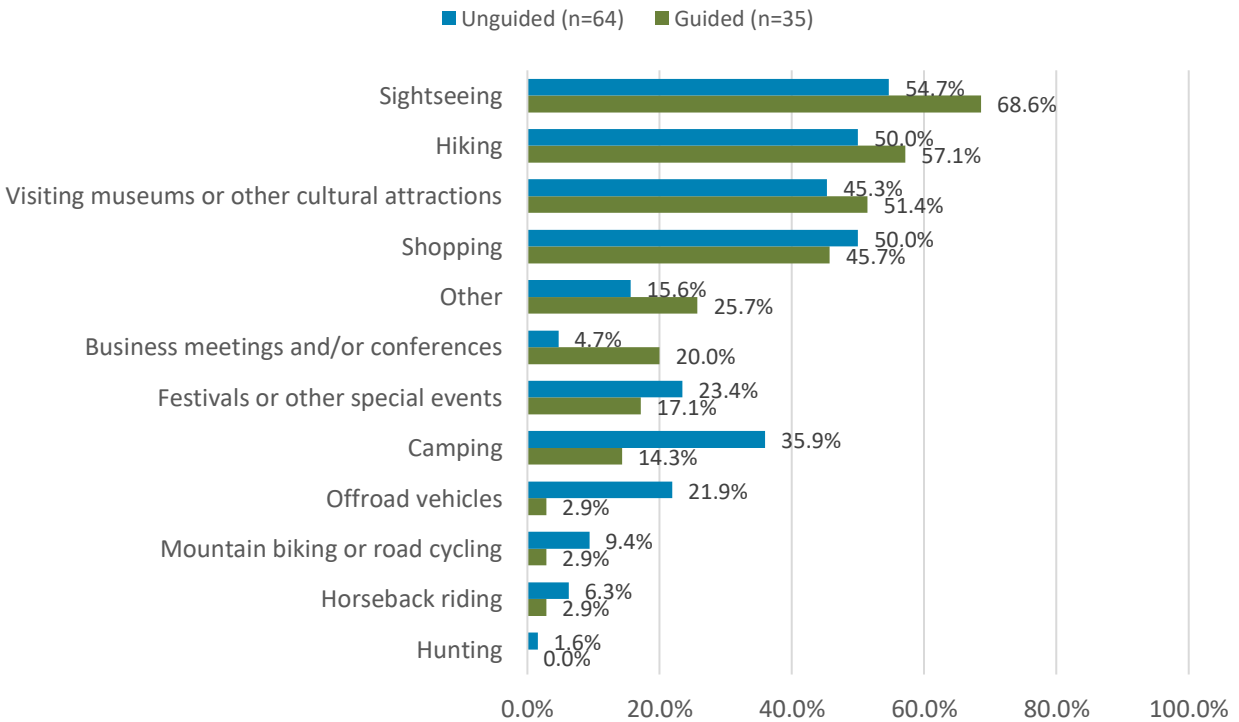


Figure 37. Activities other than fishing.



Unlike hunting, most nonresident anglers in New Mexico did not visit for the primary purpose of fishing, as indicated in Figure 38. Four out of five reported they would have still visited New Mexico even if fishing was not an option on their trip.

Figure 38. Would you have visited New Mexico even if you could not fish?

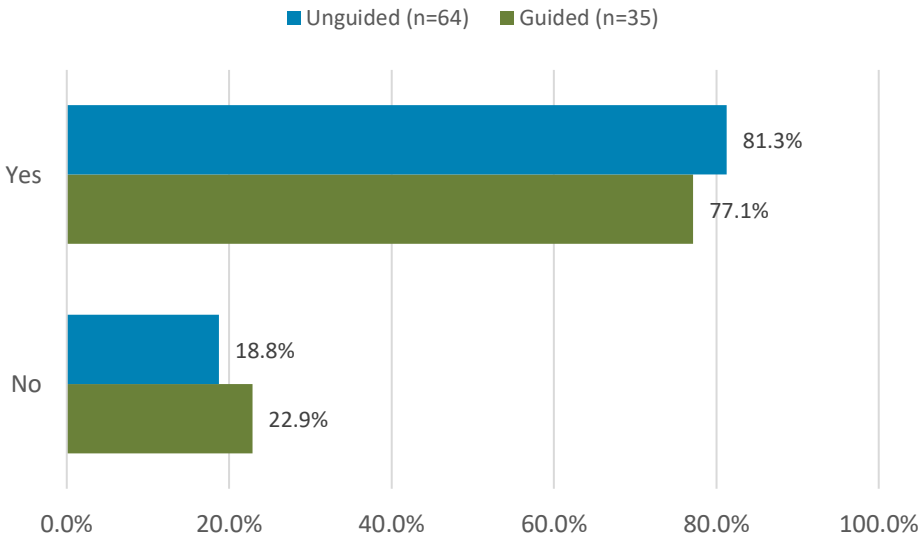
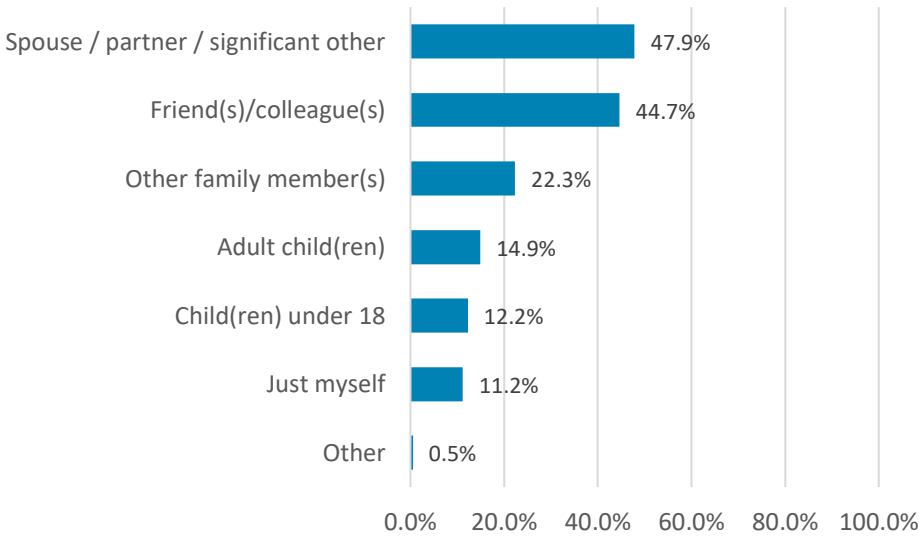


Figure 39. Others who accompanied angler on fishing trips to New Mexico.



There are multiple reasons why people hire fishing guides. New Mexico's nonresident anglers report tapping into guides' fishing skills and knowledge as the top reason followed by having the proper and necessary gear to be successful fishing (Figure 40). Figure 41 shows 100% of all reporting nonresident anglers reported being somewhat or very satisfied with their guides, with 97.5% reporting being very satisfied.

Figure 40. Importance of reasons for hiring an outfitter or guide to fish in New Mexico.

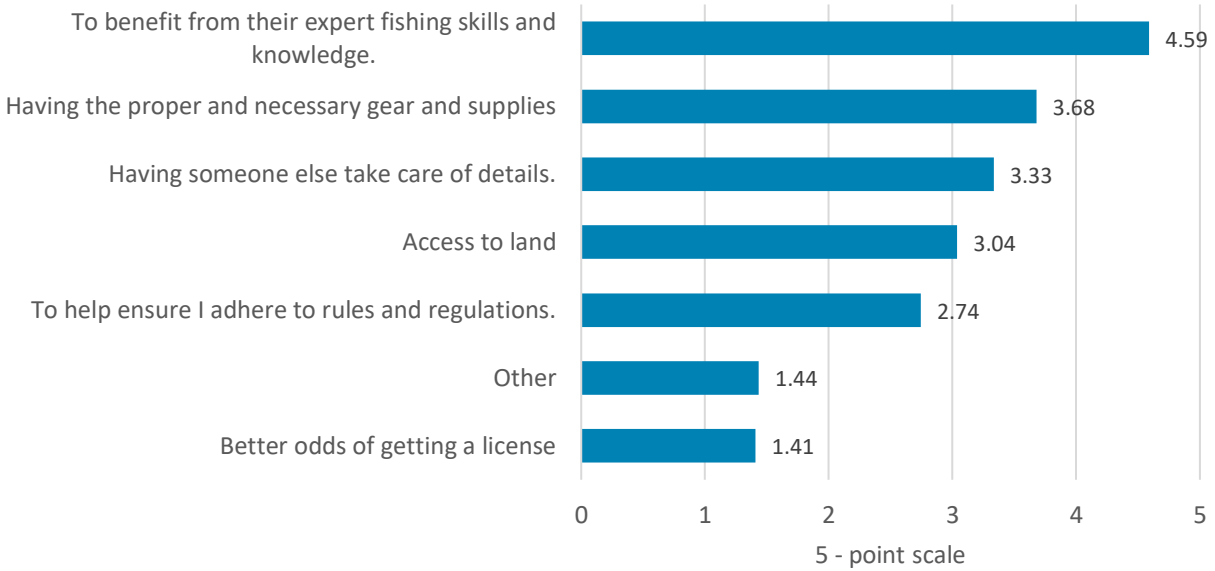
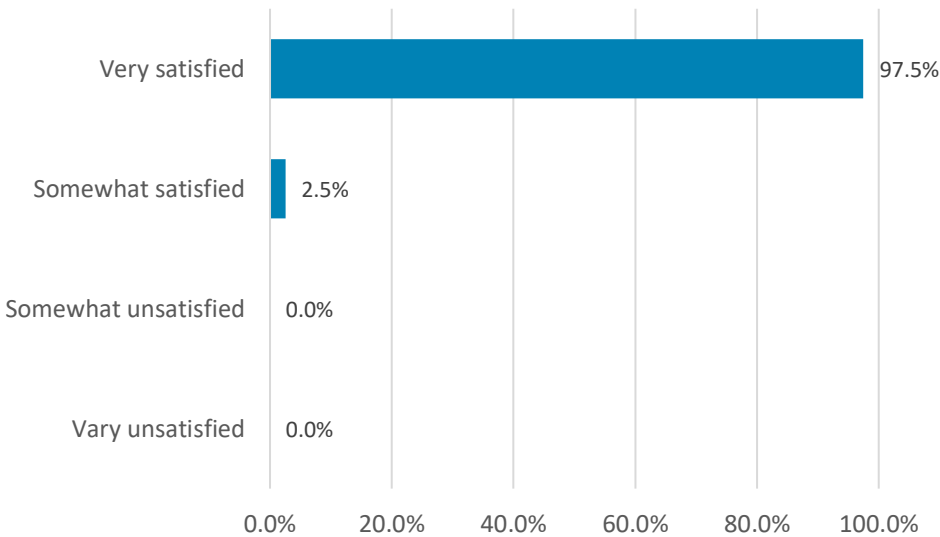


Figure 41. Satisfaction with outfitter or guide.



Demographics

Most of New Mexico’s nonresident anglers are male (Figure 42), 55 or older (Figure 43), white (Figure 45) and come from the same neighboring states as nonresident hunters such as Texas and Colorado (Figure 46). Figure 44 shows a very significant difference between guided and unguided nonresident anglers with the guided visitors having a much higher average income.

Figure 42. Gender.

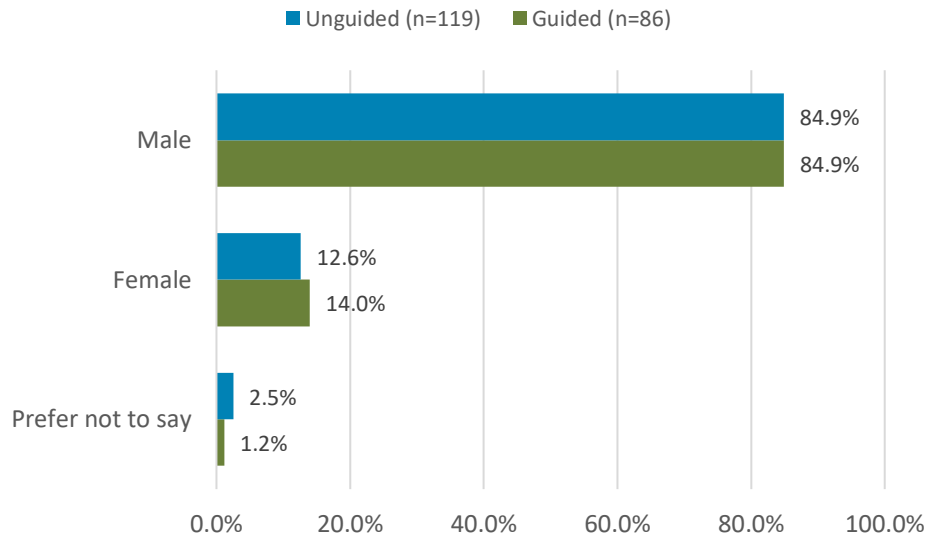


Figure 43. Age.

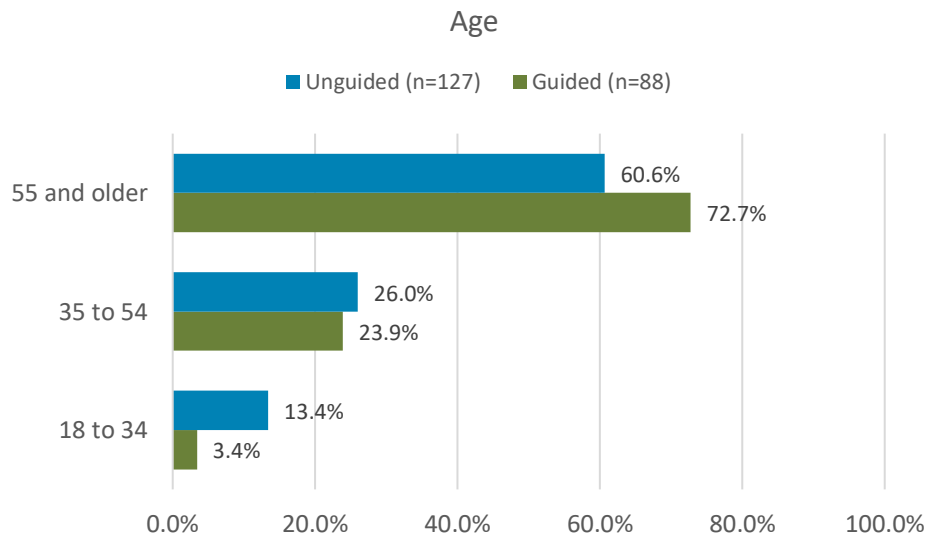


Figure 44. Household income.

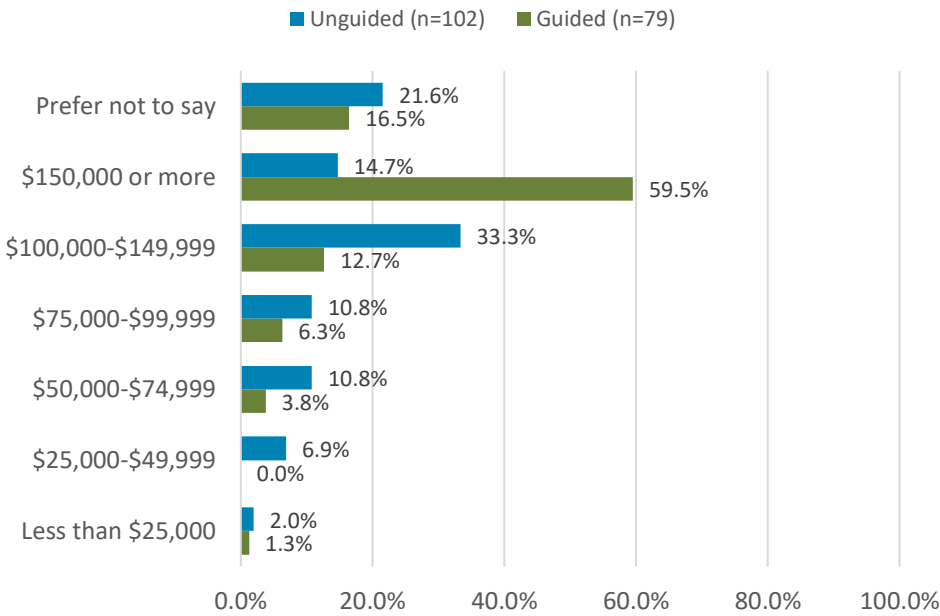


Figure 45. Race/ethnicity.

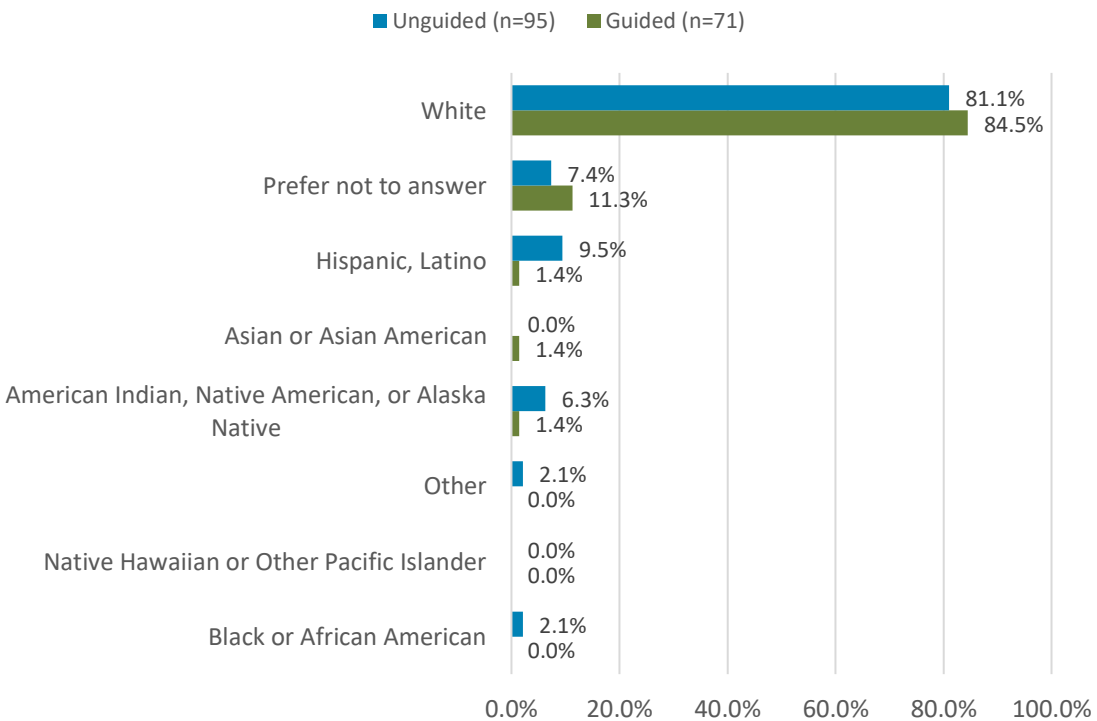
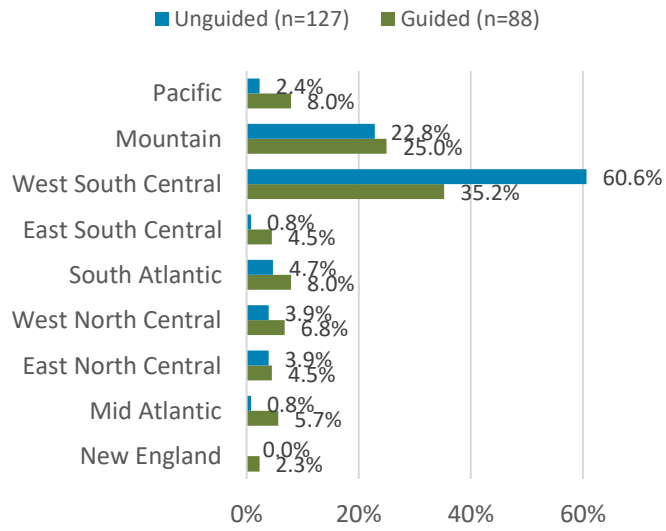


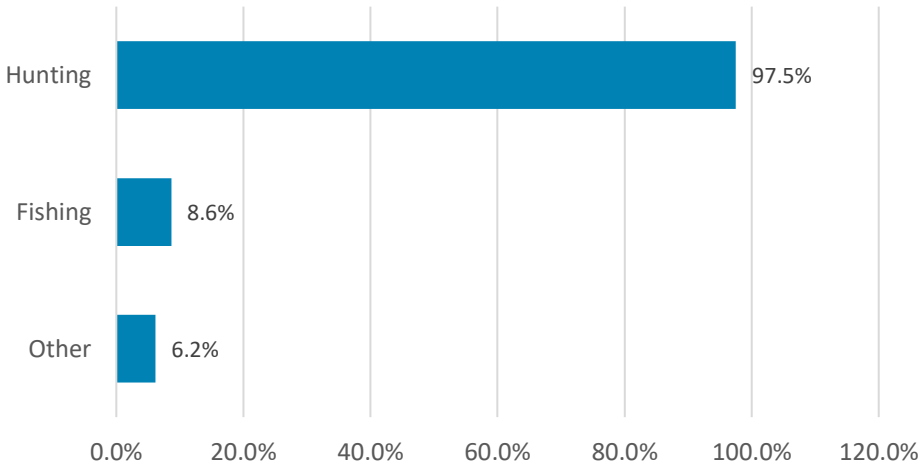
Figure 46. Region of residence.



Guides and Outfitters

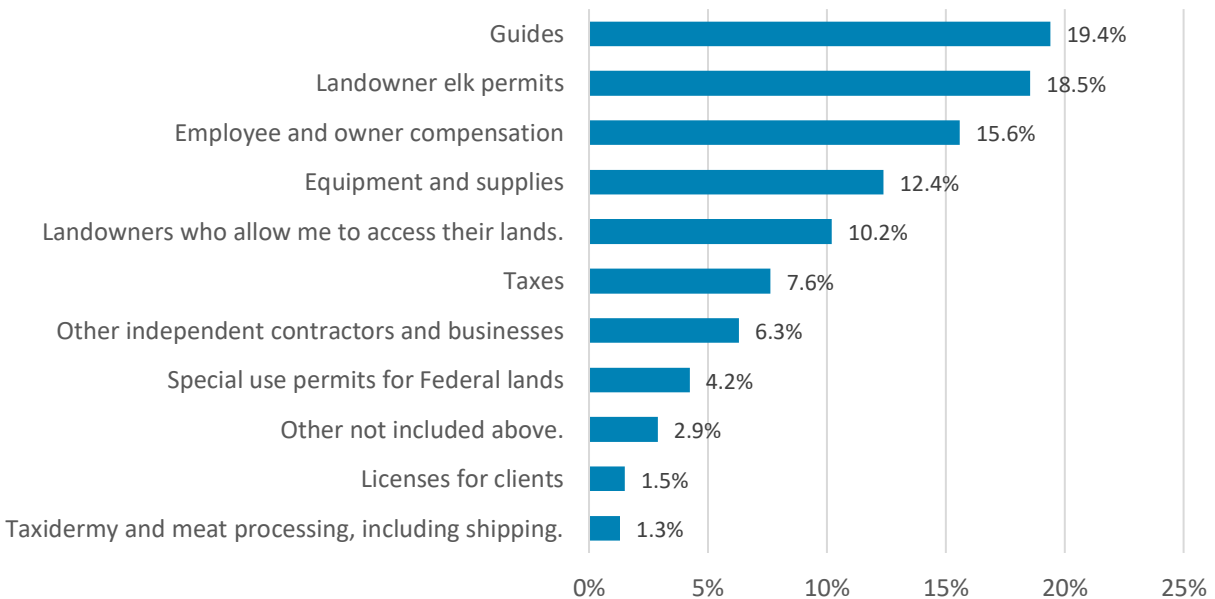
Hunting is the top activity by far among the responding guides and outfitters (Figure 47).

Figure 47. Types of trips offered by outfitters and guides.



Of their operational expenses, two of the top three expenses are compensation to the guides and owners, with fees to landowners for elk permits (EPLUS permits) also in the top three. Additional fees paid to landowners are also a top expense (Figure 48).

Figure 48. Distribution of revenue received by outfitters.



Given many more days are open to fishing each year in New Mexico compared to hunting, the average fishing guide is afield more days per year compared to hunting guides (Figure 49). The majority of guide and outfitter clients are nonresidents, with over 90% of hunting clients being from out of state (Figure 50).

Figure 49. Average annual number of clients by type.

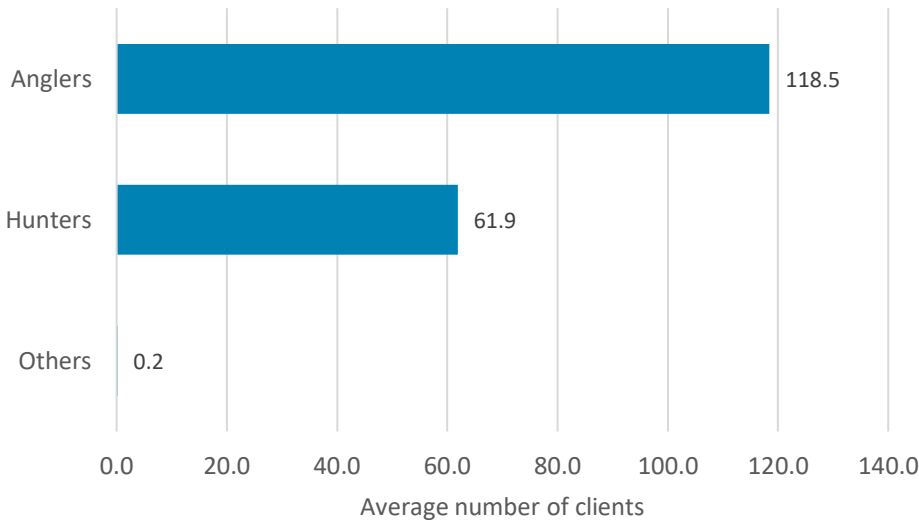
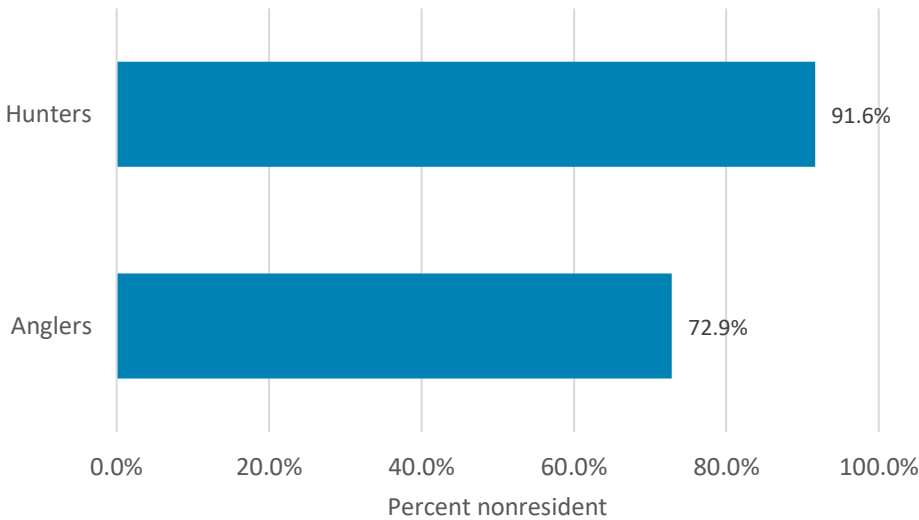


Figure 50. Percent of guided anglers and hunters who are nonresidents.



Appendices

Appendix A: Spending Details

Hunting

Table 11. Detailed Spending by Nonresident Guided Hunters in New Mexico.

Hunters	Elk	Pronghorn	Deer	Sheep	Other Species	Total
Total Hunters	12,678	2,270	3,641	535	37,995	57,119
Guided	10,495	1,582	1,830	345	1,936	16,188
Outfitter Fees & Tips	Elk	Pronghorn	Deer	Sheep	Other Species	Total
Total paid to outfitter (not including tips)	\$82,943,527	\$6,057,099	\$7,640,083	\$1,551,376	\$8,772,883	\$106,964,969
Total tips paid directly to guides	\$10,371,210	\$866,152	\$1,044,441	\$240,461	\$976,923	\$13,499,187
Total tips paid to other camp staff	\$2,760,000	\$387,586	\$215,937	\$15,298	\$88,369	\$3,467,190
Total fees and tips	\$96,074,737	\$7,310,837	\$8,900,461	\$1,807,135	\$9,838,175	\$123,931,345
Travel Expenses to New Mexico	Elk	Pronghorn	Deer	Sheep	Other Species	Total
Airfare - to New Mexico	\$5,536,538	\$143,922	\$280,702	\$74,285	\$487,284	\$6,522,732
Motor vehicle rental - outside New Mexico	\$1,290,469	\$160,491	\$140,856	\$44,620	\$208,738	\$1,845,174
Other transportation - to New Mexico	\$313,060	\$14,633	\$51,063	\$25,713	\$92,494	\$496,963
Fuel and other operating costs for personal or rented motor vehicle - getting to New Mexico	\$4,423,242	\$488,290	\$755,816	\$168,168	\$707,988	\$6,543,505
Total Trip Spending to New Mexico	\$11,563,310	\$807,336	\$1,228,437	\$312,786	\$1,496,504	\$15,408,373

Table 11 (continued). Detailed Spending by Nonresident Guided Hunters in New Mexico.

Trip Related Expenses within New Mexico	Elk	Pronghorn	Deer	Sheep	Other Species	Total
Groceries	\$997,185	\$85,526	\$183,525	\$41,016	\$470,274	\$1,777,525
Restaurants and bars	\$1,631,776	\$204,329	\$325,376	\$47,655	\$559,065	\$2,768,202
Lodging	\$2,328,832	\$197,465	\$513,113	\$102,700	\$889,131	\$4,031,241
Equipment rental	\$74,894	\$0	\$1,098	\$0	\$5,086	\$81,079
Fees paid directly to landowners for hunting access	\$1,140,492	\$1,013,358	\$307,475	\$0	\$170,760	\$2,632,085
Landowner elk permits directly from landowner	\$2,379,396	\$0	\$0	\$0	\$0	\$2,379,396
Fuel and other operating costs for ATV, boat, etc.	\$237,555	\$29,183	\$59,431	\$10,860	\$86,122	\$423,151
Other day-to-day items	\$362,486	\$82,814	\$48,304	\$5,925	\$162,781	\$662,310
Hunting licenses and tags	\$4,118,503	\$460,284	\$596,049	\$178,776	\$1,353,351	\$6,706,962
Airfare (within New Mexico)	\$356,133	\$0	\$51,984	\$20,125	\$5,548	\$433,791
Motor vehicle rental within New Mexico	\$470,581	\$42,070	\$40,006	\$33,071	\$17,547	\$603,275
Other transportation	\$34,311	\$0	\$329	\$1,513	\$0	\$36,153
Fuel and other vehicle operating costs	\$1,353,928	\$177,141	\$263,546	\$65,349	\$449,242	\$2,309,206
Other items	\$477,475	\$3,721	\$28,975	\$3,733	\$160,945	\$674,849
Total Trip Spending within New Mexico	\$15,963,549	\$2,295,892	\$2,419,212	\$510,723	\$4,329,851	\$25,519,226

Table 11 (continued). Detailed Spending by Nonresident Guided Hunters in New Mexico.

Hunting Equipment Spending in New Mexico	Elk	Pronghorn	Deer	Sheep	Other Species	Total
Ammunition	\$369,424	\$44,591	\$71,713	\$14,172	\$9,063	\$508,963
Firearms & bows	\$2,078,732	\$210,232	\$255,669	\$27,448	\$30,904	\$2,602,985
Optics (scopes, binoculars)	\$1,704,678	\$309,277	\$404,546	\$57,908	\$51,980	\$2,528,388
Cameras, including game cameras	\$158,355	\$0	\$3,336	\$0	\$0	\$161,691
Clothing used specifically for hunting	\$1,282,839	\$60,519	\$137,749	\$38,922	\$18,293	\$1,538,322
Motor vehicles, ATV, boats, trailers, campers, and accessories	\$949,367	\$21,950	\$364,660	\$0	\$0	\$1,335,977
Maps	\$32,189	\$0	\$9,857	\$0	\$3,879	\$45,925
Camping equipment	\$172,978	\$26,558	\$51,194	\$2,167	\$7,307	\$260,205
Hunting dog supplies	\$1,618	\$0	\$2,855	\$0	\$0	\$4,473
Books, magazines	\$18,877	\$3,432	\$4,240	\$0	\$1,271	\$27,820
Other hunting gear	\$608,402	\$94,144	\$75,649	\$6,525	\$41,186	\$825,907
Hunting Equipment Total	\$7,377,460	\$770,703	\$1,381,468	\$147,142	\$163,883	\$9,840,656

Table 11 (continued). Detailed Spending by Nonresident Guided Hunters in New Mexico.

Repair and other services in New Mexico	Elk	Pronghorn	Deer	Sheep	Other Species	Total
Repair of hunting & mechanical equipment	\$94,477	\$0	\$11,805	\$0	\$7,622	\$113,904
Taxidermy	\$1,504,136	\$145,690	\$268,099	\$31,523	\$638,686	\$2,588,133
Meat processing and/or shipping	\$2,124,432	\$15,638	\$58,075	\$1,469	\$106,928	\$2,306,541
Total repair and other services	\$3,723,045	\$161,327	\$337,979	\$32,992	\$753,236	\$5,008,579
New Mexico Real Estate Expenses	Elk	Pronghorn	Deer	Sheep	Other Species	Total
Amount spent on undeveloped land	\$0	\$0	\$0	\$0	\$0	\$0
Amount spent on developed land	\$31,852	\$0	\$6,589	\$0	\$0	\$38,441
Total Real Estate Spending	\$31,852	\$0	\$6,589	\$0	\$0	\$38,441
Total Spending	\$134,733,952	\$11,346,095	\$14,274,145	\$2,810,778	\$16,581,649	\$179,746,620
Total Spending within New Mexico *	\$125,938,912	\$10,610,719	\$13,186,059	\$2,535,135	\$15,328,787	\$167,599,612

* Includes one-half of airfare to get to New Mexico but excludes all other travel expenses on travel to New Mexico.

Table 12. Outfitter Spending of fees collected from hunters.

Outfitter Spending	Elk	Pronghorn	Deer	Sheep	Other Species	Total
Landowners who allow me to access their lands.	\$5,291,797	\$759,210	\$957,624	\$194,453	\$1,099,612	\$8,302,696
Guides	\$14,963,012	\$1,442,242	\$1,819,162	\$369,395	\$2,088,891	\$20,682,701
Other independent contractors and businesses (cooks, packers, transportation, lodging, etc.)	\$4,719,487	\$469,030	\$591,608	\$120,130	\$679,326	\$6,579,582
Employee and owner compensation	\$10,525,534	\$1,158,800	\$1,461,645	\$296,798	\$1,678,364	\$15,121,141
Equipment and supplies (food and beverage, hunting equipment, camp gear, vehicles, etc.).	\$9,372,619	\$920,425	\$1,160,972	\$235,744	\$1,333,110	\$13,022,870
Licenses for clients	\$1,716,931	\$112,605	\$142,034	\$28,841	\$163,094	\$2,163,505
Special use permits for Federal lands	\$2,903,023	\$314,654	\$396,887	\$80,591	\$455,734	\$4,150,890
Taxes	\$6,428,123	\$567,686	\$716,047	\$145,399	\$822,216	\$8,679,471
Landowner elk permits	\$23,962,385	\$0	\$0	\$0	\$0	\$23,962,385
Taxidermy and meat processing, including shipping.	\$1,534,455	\$97,398	\$122,853	\$24,946	\$141,068	\$1,920,720
Other not included above.	\$1,534,455	\$215,048	\$271,250	\$55,079	\$311,468	\$2,387,301
	\$82,951,821	\$6,057,099	\$7,640,083	\$1,551,376	\$8,772,883	\$106,973,263

Fishing*Table 13. Detailed Spending by Nonresident Guided Anglers in New Mexico.*

Nonresident Total Angler Spending	Guided Anglers
Total Anglers	64,394
Guided	26,357
Outfitter Fees & Tips	
Total paid to outfitter (not including tips)	\$26,094,556
Total tips paid directly to guides	\$5,105,165
Total tips paid to other camp staff	\$734,333
Total fees and tips	\$31,934,055
Travel Expenses to New Mexico	
Airfare - to New Mexico	\$7,878,831
Motor vehicle rental - outside New Mexico	\$2,892,339
Other transportation - to New Mexico	\$362,025
Fuel and other operating costs for personal or rented motor vehicle - getting to New Mexico	\$3,650,691
Total Trip Spending to New Mexico	\$14,783,885

Table 13 (continued). Detailed Spending by Nonresident Guided Anglers in New Mexico.

Trip Related Expenses within New Mexico	
Groceries	\$1,386,717
Restaurants and bars	\$4,044,842
Lodging (cabin, motel, lodge, rental, campground, etc.)	\$12,308,239
Equipment rental	\$14,975
Fees paid to landowners for fishing access (not part of an outfitter's fee)	\$0
Bait	\$77,872
Fuel and other operating costs for ATV, boat, etc.	\$169,521
Other day-to-day items (heating/cooking fuel, ice, etc.)	\$302,502
Fishing licenses and tags (not part of outfitters fee)	\$1,019,222
Airfare (for flights within New Mexico)	\$613,989
Motor vehicle rental within New Mexico	\$1,578,402
Other transportation	\$119,803
Fuel and other operating costs for personal or rented motor vehicle	\$1,609,850
Other items (souvenirs, camping gear, etc.)	\$1,527,486
Total Trip Spending within New Mexico	\$24,773,420
Fishing Equipment Spending in New Mexico	
Rods, reels	\$1,944,936
Lines, leaders	\$208,732
Lures	\$201,461
Hooks, sinkers, etc	\$35,445
Tackle boxes	\$12,724
Creels, nets, stringers	\$4,493
Traps and bait containers	\$0
Depth Finders and other electronics	\$0
Motor vehicles, ATV, boats, trailers, campers, and accompanying accessories used for fishing	\$0
Maps	\$1,498
Camping equipment (tent, sleeping bag, stove, compass, etc.)	\$44,926
Books, magazines, cell phone apps	\$37,438
Other fishing-related equipment	\$594,521
Fishing Equipment Total	\$3,086,175

Table 13 (continued). Detailed Spending by Nonresident Guided Anglers in New Mexico.

Repair and other services in New Mexico	
Repair of fishing & mechanical equipment	\$0
Taxidermy	\$0
Fish processing and/or shipping	\$0
Total repair and other services	\$0
New Mexico Real Estate Expenses	
Fishing related undeveloped land expense	\$0
Fishing related developed land expense	\$1,173,543
Total Real Estate Spending	\$1,173,543
Total Spending	\$75,751,077
Total Spending within New Mexico *	\$64,906,608

* Excludes spending received by parties outside of New Mexico for travel to New Mexico.

Table 14. Outfitter spending of fees collected from anglers.

Outfitter Spending	Guided
Landowners who allow me to access their lands.	\$4,161,811
Guides	\$8,864,658
Other independent contractors and businesses (cooks, packers, transportation, lodging, etc.)	\$2,746,795
Employee and owner compensation	\$2,705,177
Equipment and supplies (food and beverage, hunting equipment, camp gear, vehicles, etc.).	\$3,745,630
Licenses for clients	\$0
Special use permits for Federal lands	\$1,290,161
Taxes	\$2,372,232
Taxidermy and fish processing, including shipping.	\$83,236
Other not included above.	\$124,854

Appendix B: Economic Contributions - Definitions and Modeling Process

The process to estimate the total statewide economic contributions for nonresident guided hunting and angling first matches each expenditure reported by the survey to a specific industry based on the appropriate North American Industry Classification System (NAICS) code. The expenditures were then assessed using economic models built for New Mexico's guided hunting and fishing 'industries' using the IMPLAN input-output modeling system.

The IMPLAN-based models describe how sales in one industry affect other industries (see Figure A1 in the Appendix). For example, once a consumer makes a purchase, the retailer buys more merchandise from wholesalers, who buy more from manufacturers, who in turn purchase more raw materials inputs and supplies. In addition, the salaries and wages paid by these businesses stimulate more benefits. Simply put, the first purchase by New Mexico's nonresident hunters in the state then starts multiple rounds of purchasing. The economic analysis takes over by tracking how the dollars flow from the consumer through all of the affected businesses, either directly or indirectly, then reports the total economic activity that occurred.

The following economic contributions are reported:

Total Output: The value of many measurable rounds of economic activity that occur within the economy generated by nonresident guided hunter and angler spending is known as total output and is sometimes referred to as the total multiplier effect. Because it does not subtract the value of raw materials as they change hands moving through the supply chain, this measure essentially double-counts a portion of the output of the industries in the value chain. Overall, a good definition for this measure is: "If nonresident hunters stopped spending money on guided hunts and did not spend that money anywhere else, the economy would shrink by this amount."

Contribution to Gross Domestic Product (GDP): This represents the new contributions to the economy from nonresident guided hunters and anglers. It is essentially the same as total output (above) but removes the double counting. This is also often referred to as the total "value added" made by the industries involved in the production of goods and services used by nonresident guided hunters and anglers. For economists, this measure tells us the net contribution to the state economy and is a preferred measure of an activity's contribution to economic growth and prosperity.

Jobs: This value reports the total jobs in all sectors of the economy resulting from the state's nonresident guided hunting and fishing activity and includes both full-time and part-time positions. These are not just the employees directly serving trout anglers or who manufactured their gear but also include employees of industries that support and supply the businesses that directly support these hunters and anglers; from truck drivers to accountants.

Salaries and wages: This value reports the total salaries and wages paid in all sectors of the regional economy as a result of the state's nonresident guided hunting and fishing activity, including the net earnings or take-home pay earned by small business owners. These are not just the paychecks of employees directly serving anglers or manufacturing their goods, it also includes portions of the paychecks of all employees affected by the direct, indirect, and induced effects. For example, it would include a portion of the dollars earned by the truck driver who

delivers food to the restaurants serving nonresident guided hunters and angler and the accountants who manage the books for companies down the supply chain.

Local and state taxes: These figures report the total revenues earned by each level of government as a result of the economic activity originally stimulated by spending. These include more than the taxes paid directly by nonresident guided hunters and anglers, but also include the various taxes generated as their dollars cycle through the state economy.

For all economic measures above, the creation of additional economic impacts stops when nonresident guided hunter and angler dollars leave the state economy or when the contributions are no longer measurable. Only economic activity that occurs within the state of New Mexico are considered and reported.