# COMMISSION MEETING AGENDA BRIEFING

**Meeting Date:** June 13, 2025 **Agenda Number:** 14

**Presenter:** Jason Clement, Stepchild and Tristanna Carrell **Corroborator:**

**Agenda Title:** Results of the Customer and Community Survey

1. **Summary of Agenda Item**

   In 2025, the Department commissioned ongoing, repeating quantitative research to help inform our Information and Education goals and track progress against our efforts. The research aims to produce an ongoing look at key health measures for the Department including awareness and satisfaction levels, attitudes toward conservation, outdoor participation trends, hunting and fishing trends and community and customer demographics.

2. **Background Information**

   Stepchild and Banyay, local New Mexico marketing strategy agencies, were hired to conduct the survey and used Qualtrics as the data management platform.

3. **Strategic Plan References and Possible Impacts of Agenda Item**

   The Department will continue to use this information, partnered with other surveys to guide our marketing, advertising and outreach efforts.

4. **Considerations Regarding Duplications and/or Conflicts with Existing Rules or Statutes**

   N.A.

5. **Description and Summary of Public Involvement Process and Results**

   Non-customers: 550 fully completed, non-spam responses were gathered. This sample size ensured a 4.2% margin of error at a 95% confidence level, given the state population of approximately 2.1 M.

   Customers: 450 fully completed, non-spam responses were gathered. This sample size ensured a 4.6% margin of error at a 95% confidence level, given the total customer population of approximately 338k.

6. **Suggested Motion**

   This is not an action item and is only a discussion item.

# Customer & Community Survey Results

## 1H 2025

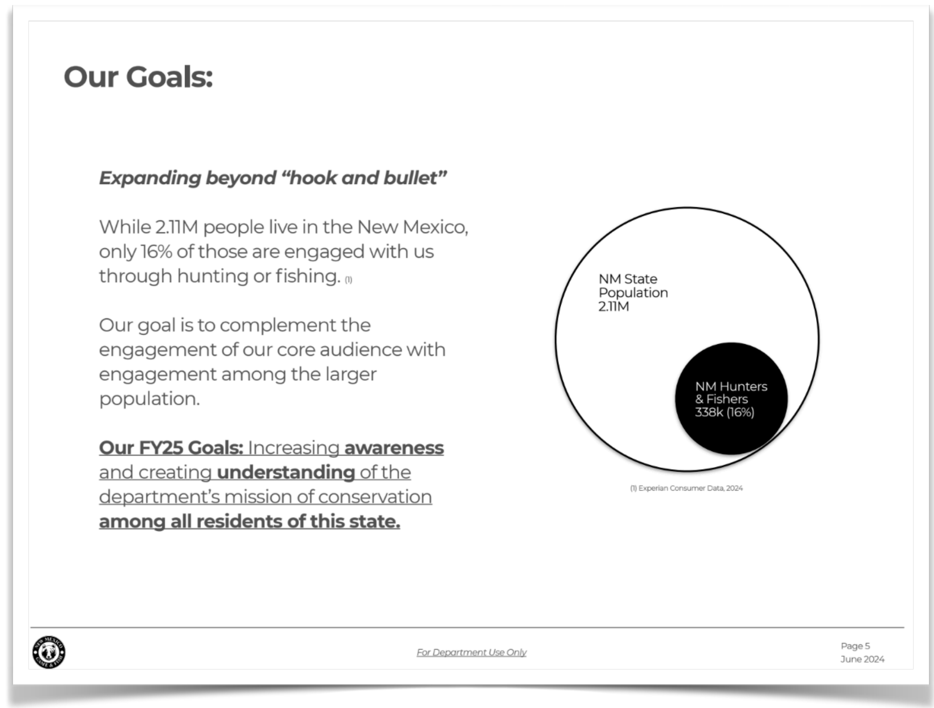
An ongoing look at the customers of the department and the community it serves.

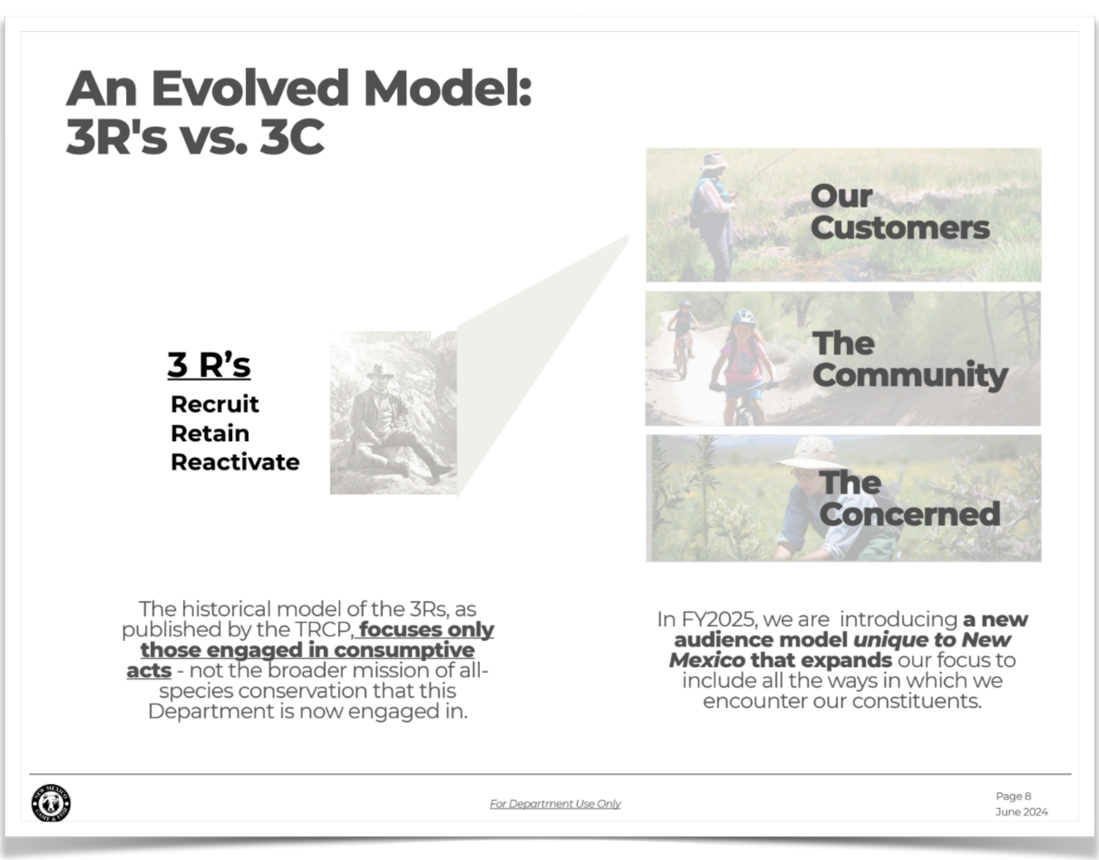
Updated May 9th, 2025

# Our “Why” of This Research

## A way to track the “reframing” of our I&E goals for FY2025 & beyond

Our most simplified goal for 205 was to expand awareness, understanding, and engagement among our non-customer, while still working to increase positive sentiment among our core customer base The survey was designed to let us track both customer and non-customer sentiment.




## An evolved customer model

We expanded the established 3R model to encompass a focus on “The Community” And “The Concerned” - groups underrepresented in the legacy 3R model, which only focuses on “Customers”

# What We Are Tracking

In 2025, the Department commissioned ongoing, repeating quantitative research to help inform our Information and Education goals and track progress against our I&E efforts. A variety of vendors were employed, with Stepchild and Banyay, local New Mexico marketing strategy agencies, taking the lead. Qualtrics provided the recruiting for the survey and the data management platform. The research aims to produce an ongoing look at key health measures for the department on a rolling six-month basis.

## Areas of exploration:


### 1. Awareness and satisfaction levels

How many residents are aware of the department and its mission? How satisfied are they with the department? How is this chaining over time?

### 2. Attitudes towards Conservation

What attitudes do the community and our customers have towards our core mission of conservation, and how is that changing over time?

### 3. Outdoor participation trends

How are residents interacting with the outdoors in ways that are relevant to our department's efforts, and what are their activity plans for the coming year?

### 4. Hunting & Fishing

How are hunters and fishers interacting with the Department and state land? What are their plans to interact more or less next year?

### 5. Community and Customer Demographics

Who are the people that make up our customer base and our community? What are the attitudes among those different demographic profiles?

# About the research

## Research Partners

We used a custom set of vendors for the research with deep expertise in consumer, customer, and brand research.

Qualtrics provided the data platform and recruitment for the non-customer New Mexico resident sample. Qualtrics is a top survey technology provider and works with global brands and local, state, and federal agencies.

Stepchild and Banyay provided survey design, development, and deployment as well as the strategic analysis of results. Both firms have experience in consumer research for large brands like Nike and Apple.

## Timing and Future Waves

Wave 1 / Baseline was in-field Winter 2024/2025

Wave 2 projected to field Fall 2025

Subsequent waves should be done every six months.

## Research Specifics

| | Non-Customers | Customers |
|---|---|---|
| *Survey Deployment* | 550 fully completed, non-spam responses were gathered. This sample size ensured a 4.2% margin of error at a 95% confidence level, given the state population of approximately 2.1 M. | 450 fully completed, non-spam responses were gathered. This sample size ensured a 4.6% margin of error at a 95% confidence level, given the total customer population of approximately 338k. |
| *Screeners & Incentives* | Non-customers were offered a choice of gift cards, varying in amount from $5 to $25, which were included in the survey base costs. | Customers were offered a free trial of OnX Hunt - valued at $8 - but at no cost to NMDGF. |

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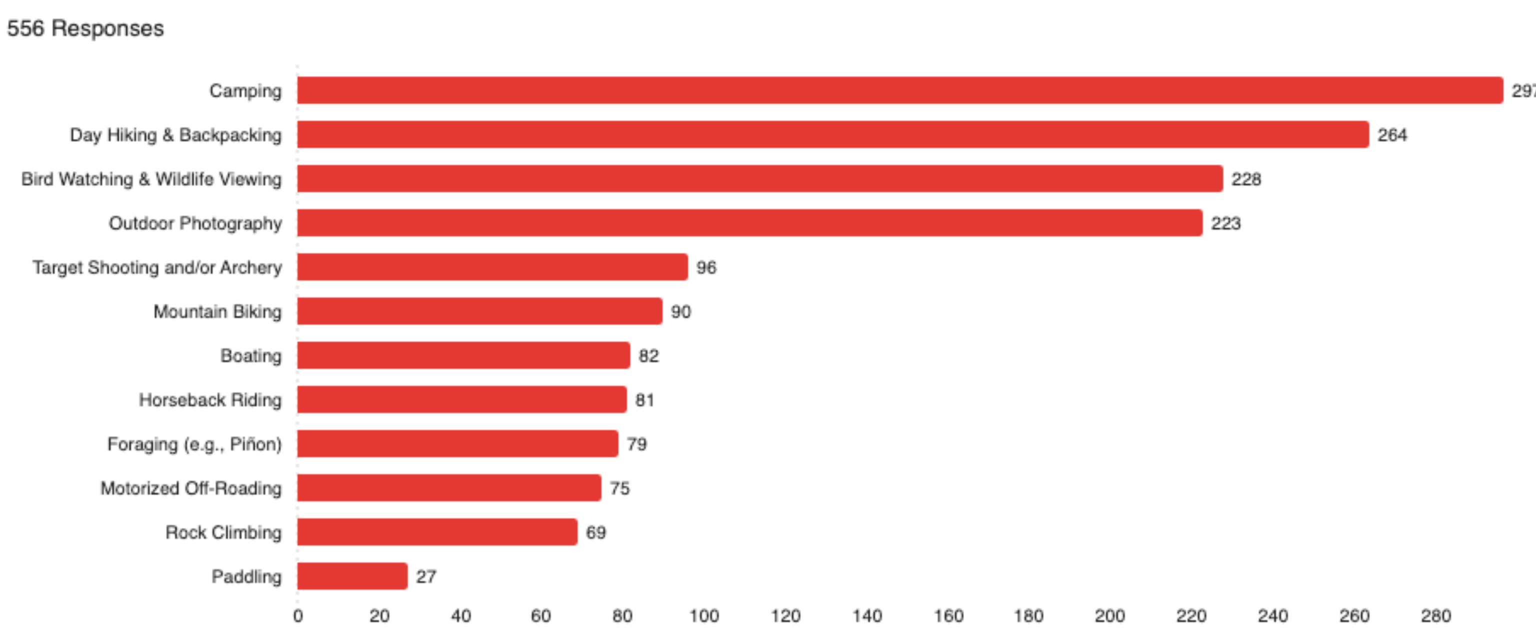
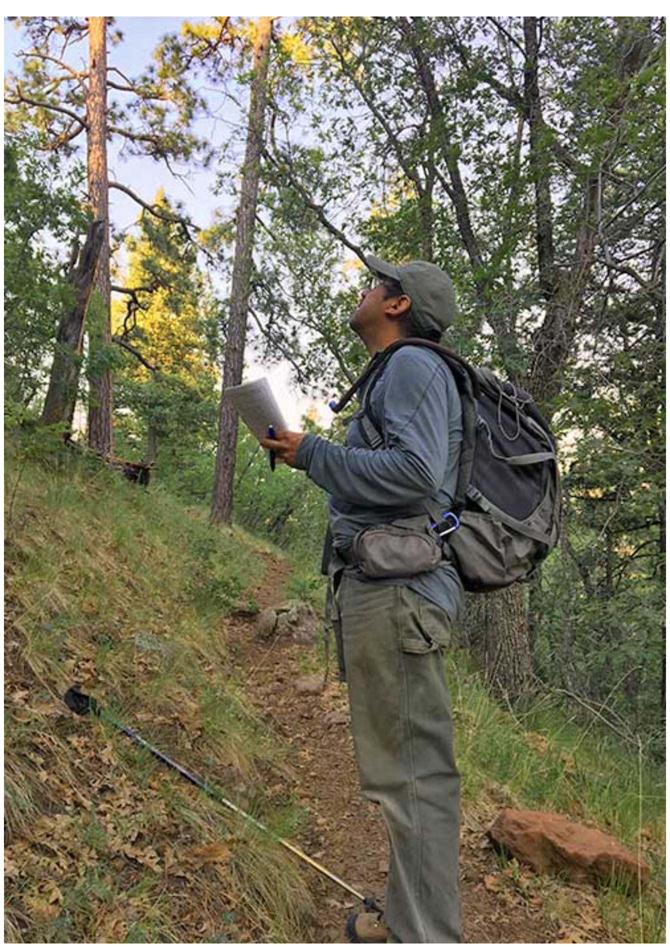
# 1. Community

1.1a

# Types of Non-Customer Outdoor Activity Participation, in the Past Four Years.



## Camping and hiking were the most popular activities for Non-Customers

Among those who said they had not purchased licenses in the past four years, 53% reported participating in Camping.

## “Non-consumptive” wildlife activities, such as Wildlife Viewing and Outdoor Photography, are also popular

This is an opportunity for the department to market products and services, such as HMAV stamps, which would grant customers access to new areas for their activity of choice and help them support wildlife conservation and the Department in the process.


Birdwatching
18% Non-Customer
Predicted Net Activity
Growth Next Year

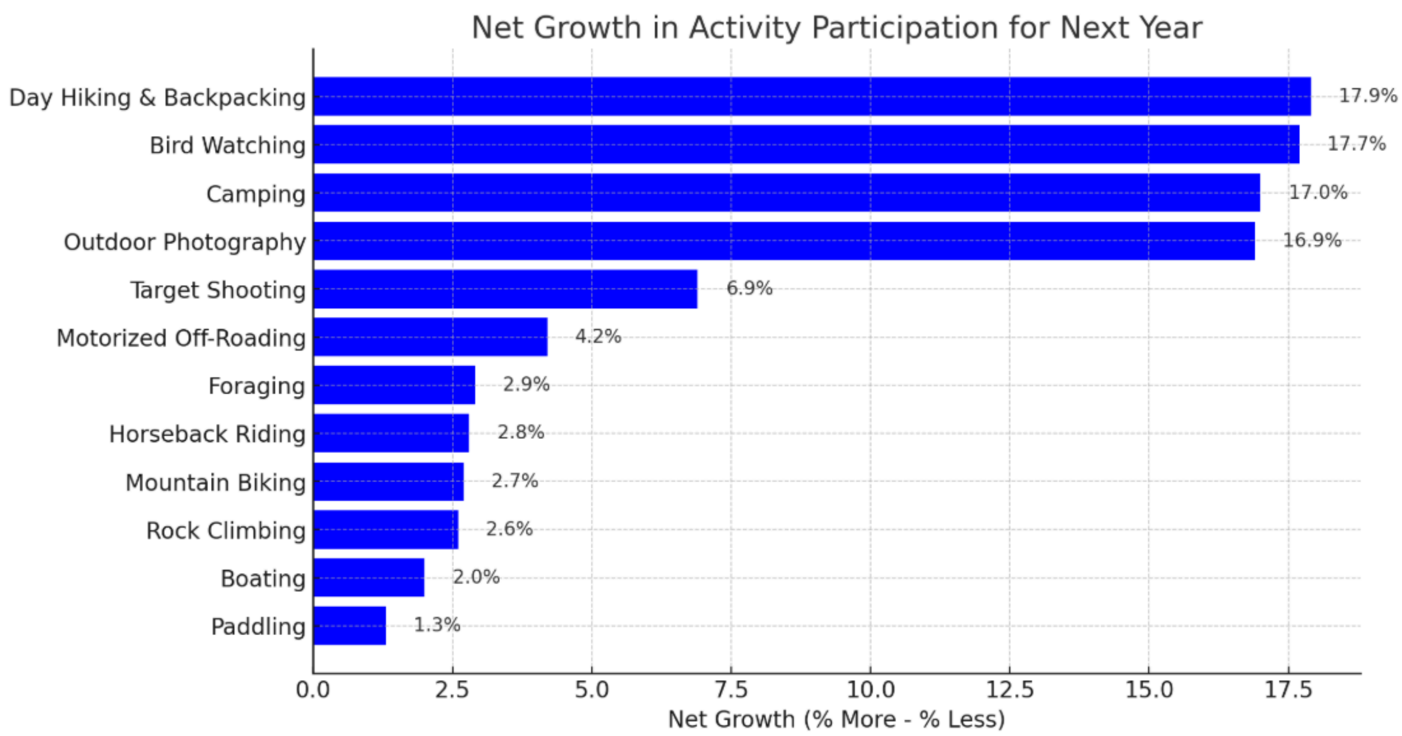

Hiking
18% Non-Customer
Predicted Net Activity
Growth Next Year

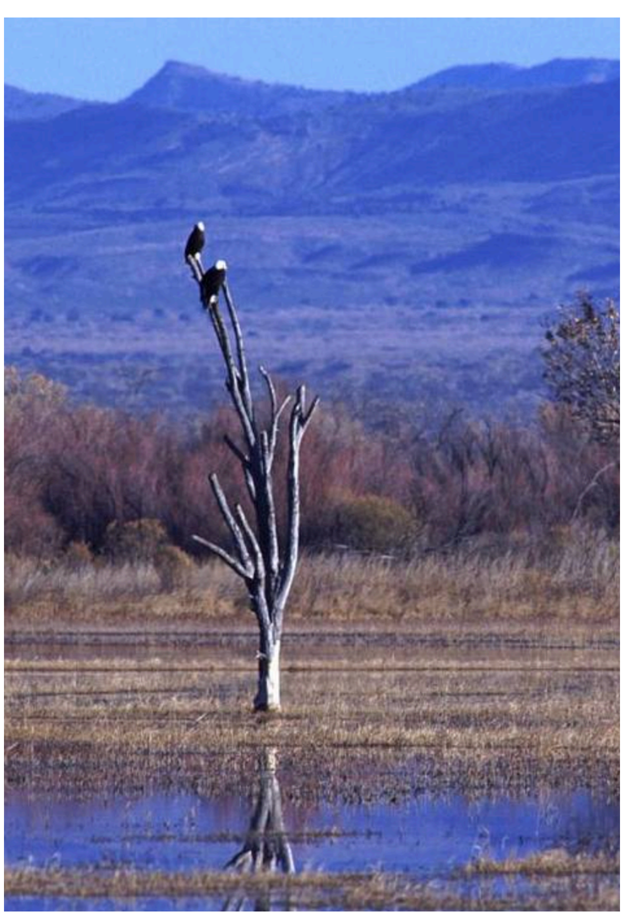

Camping
17% Non-Customer
Predicted Net Activity
Growth Next Year


Outdoor Photography
17% Non-Customer
Predicated Net Activity
Growth Next Year

1.1b

# What Non-Customers Are Planning on Doing More Next Year



Across all activities, the percentage of people planning to do more next year is consistently higher than that of those planning to do less. This suggests **an overall growth in outdoor activity participation** predicted for next year.

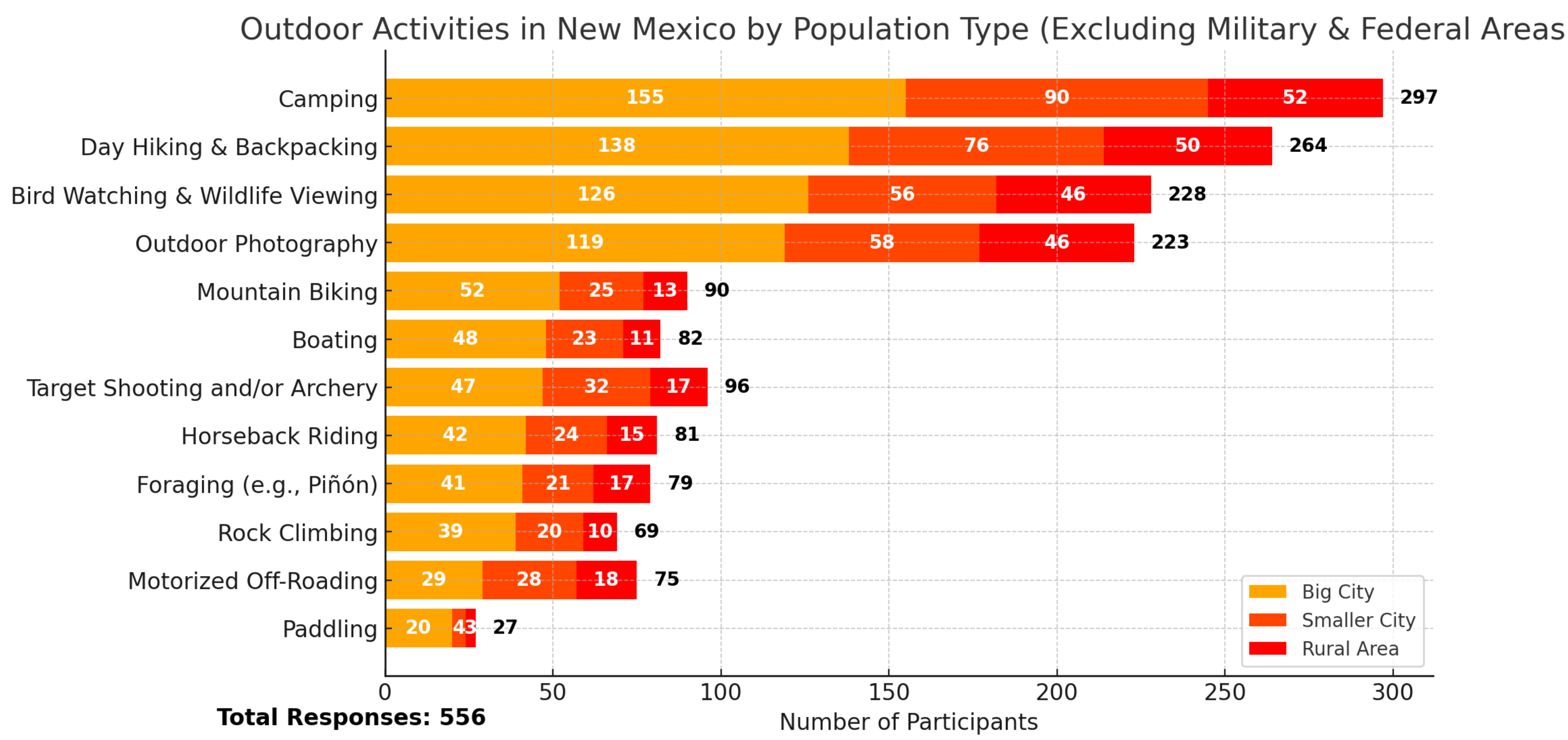
**Hiking, Bird Watching, and Camping are the top-growing activities**, each with a net increase of 17% or more.

**Motorized Off-Roading (OHV) shows a solid net predicted growth of 4.2%, which is higher than many other activities, such as** horseback riding, mountain biking, and rock climbing.

**Watersport activities like paddling and boating have the lowest predicted net growth**, indicating limited expansion in participation.

1.1c

# How Rural and Urban Non-Customers Differ in Activity Participation




### Big City Residents Participate More in Every Activity

With the exception of Off-Roading, Big City residents lead or tie in reported participation for every category—unsurprising given the sheer numbers, but it also indicates strong recreational interest even among our State's more urban residents.

### Rural Residents Over-Index on Wildlife Viewing & Outdoor Photography

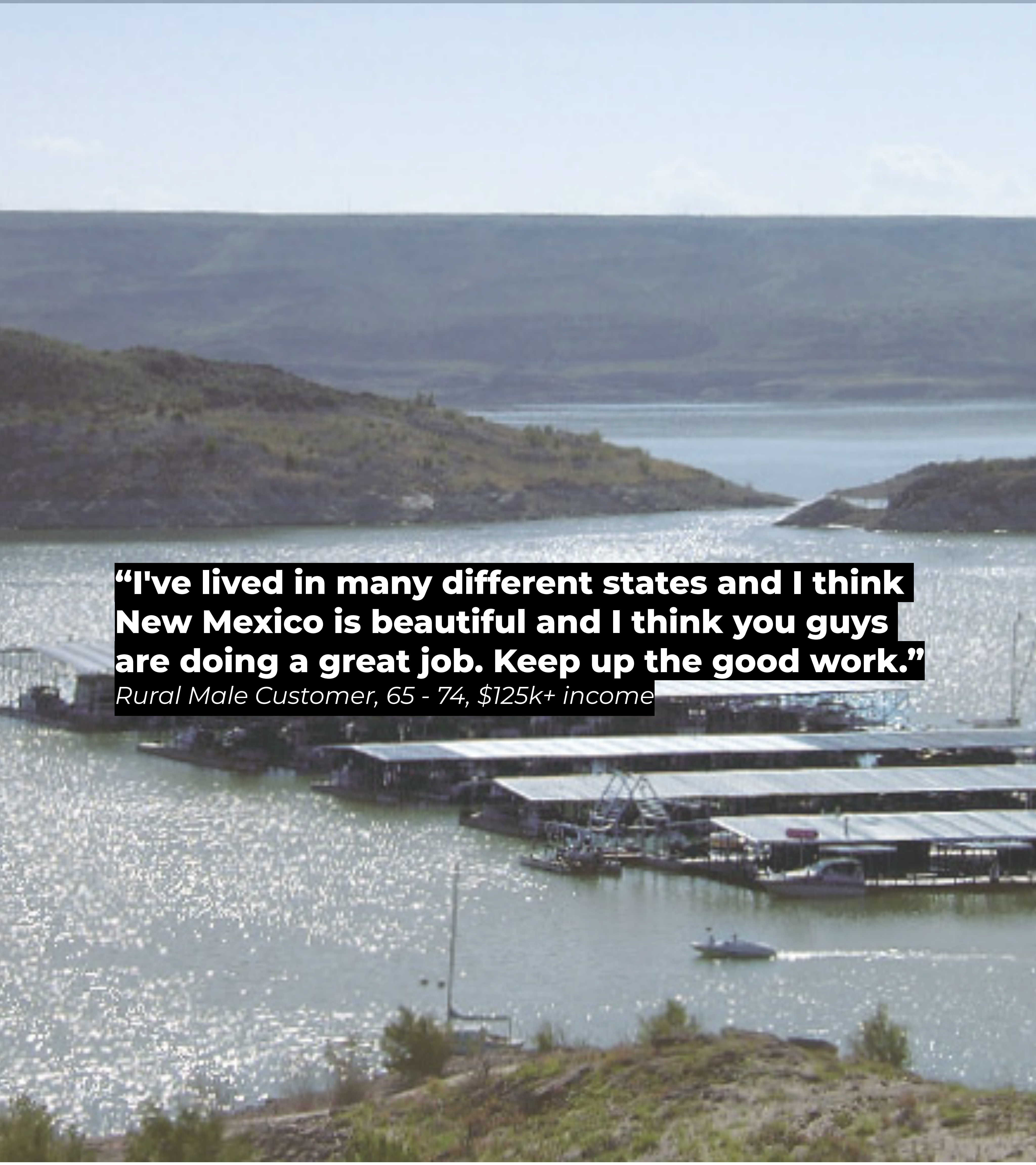
Bird Watching, Wildlife Viewing, and Outdoor Photography show a relatively high share of rural participants, despite typical characterizations of our rural residents as only "consumptive."

### Physically and Financially Demanding Sports Skew Urban

Big City and Smaller City residents dominate Mountain Biking, Rock Climbing, and Paddling

### Shooting and Off-Roading Are Rural Favorites

Target Shooting/Archery and Motorized Off-Roading are disproportionately rural: For Target Shooting: The rural share is large relative to its base. For Motorized Off-Roading: There is nearly equal participation across all areas, which is striking given population differences—a clear sign of rural intensity.



**“I've lived in many different states and I think New Mexico is beautiful and I think you guys are doing a great job. Keep up the good work.”**

*Rural Male Customer, 65 - 74, $125k+ income*

1.2a

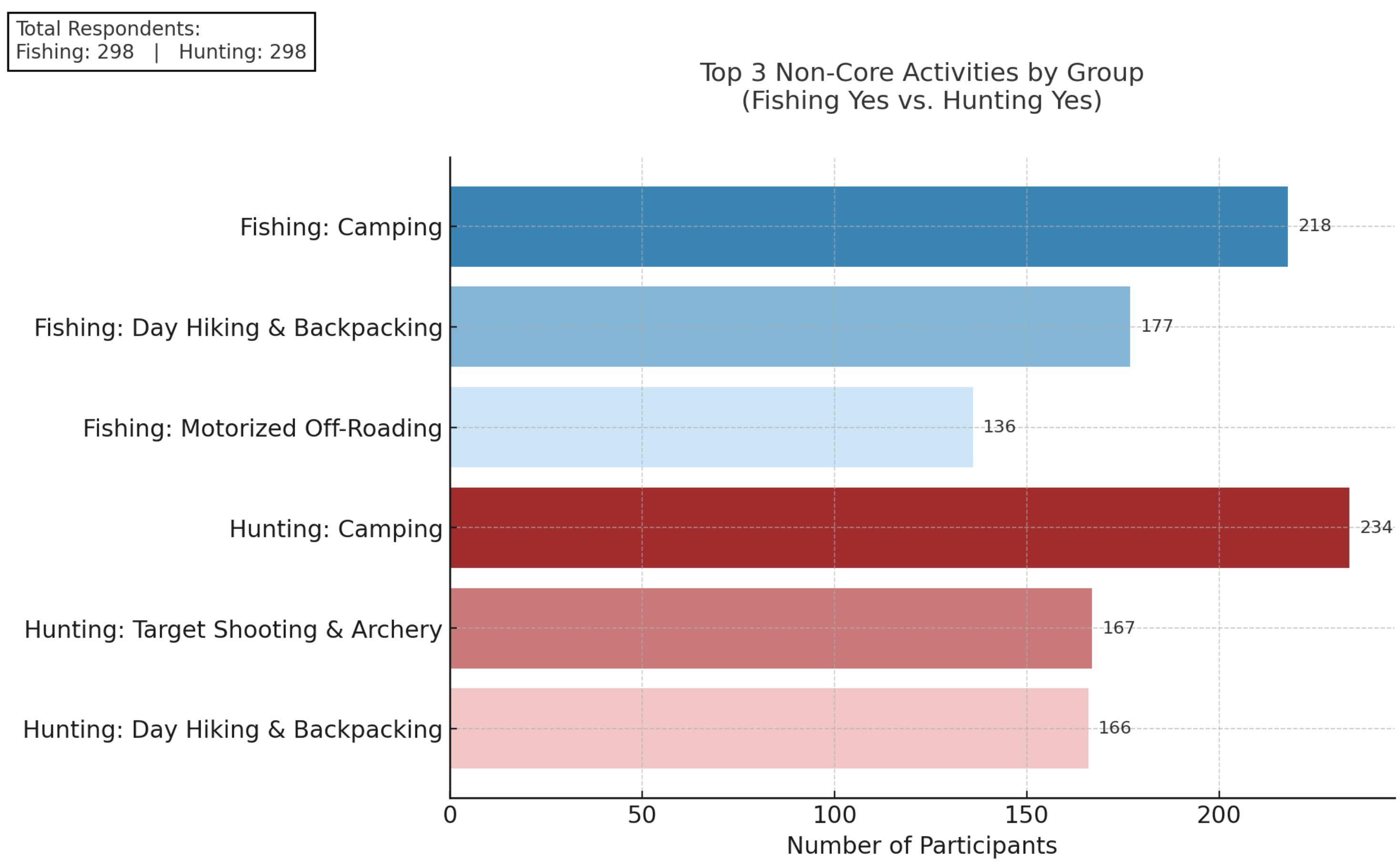
# What Activities Our Customers Report Participating In


**The Rise of "Social" Photography**
A large percentage of our customers engage in photography, likely posting them online and showing our efforts in a positive light. Targeting "photo and video" platforms like Instagram and TikTok over "conversation" platforms like Facebook is an opportunity.

**Significant "Non-Consumptive" Protected Species Engagement**
A large percentage of our customers engage in photography, likely posting them online and securing the state of our efforts in a positive light. Targeting "photo and video" platforms like Instagram and TikTok over "conversation" platforms like Facebook.

1.2b

# Looking at Non-“Hook and Bullet” Outdoor Activity Among Customers




Across customers who participate in hunting and fishing, the top 4 activities (Camping, Hiking, Off-Roading, Target Shooting) all have over 40% participation in both groups.

**Camping is the most commonly shared non-core activity,** with nearly 4 out of 5 hunters and almost 3 out of 4 fishers participating

**Target shooting is the defining activity for Hunters, making up 72% of hunter engagement.** This is the single most significant activity discrepancy between the two groups, likely explained by it’s role in improving the skills needed to successfully harvest.

The expanded chart, which showcases additional opportunities within activities with excellent common ground, such as bird watching, foraging, and photography, is represented on the next page.

1.2c

# How Participation Differs Between Customers and Non-Customers

| **Activities Most Popular with Customers** | | |
|---|---|---|
| *Activity* | *Customers (298)* | *Non-Customers (556)* |
| **Target Shooting/Archery** | 233 | 96 |
| **Motorized Off-Roading** | 149 | 75 |
| **Paddling** | 46 | 27 |
| **Foraging (e.g., Piñon)** | 88 | 79 |
| | | |
| **Activities Most Popular with Non-Customers** | | |
| *Activity* | *Customers (298)* | *Non-Customers (556)* |
| **Bird Watching/Wildlife Viewing** | 140 | 228 |
| **Outdoor Photography** | 118 | 223 |
| **Boating** | 112 | 82 |
| **Rock Climbing** | 34 | 69 |
| **Horseback Riding** | 46 | 81 |


**Customer-Specific Activities to Watch**
Target Shooting, Off-Roading, and Foraging are core identity activities for Game & Fish customers. Messaging and programs should lean into these.

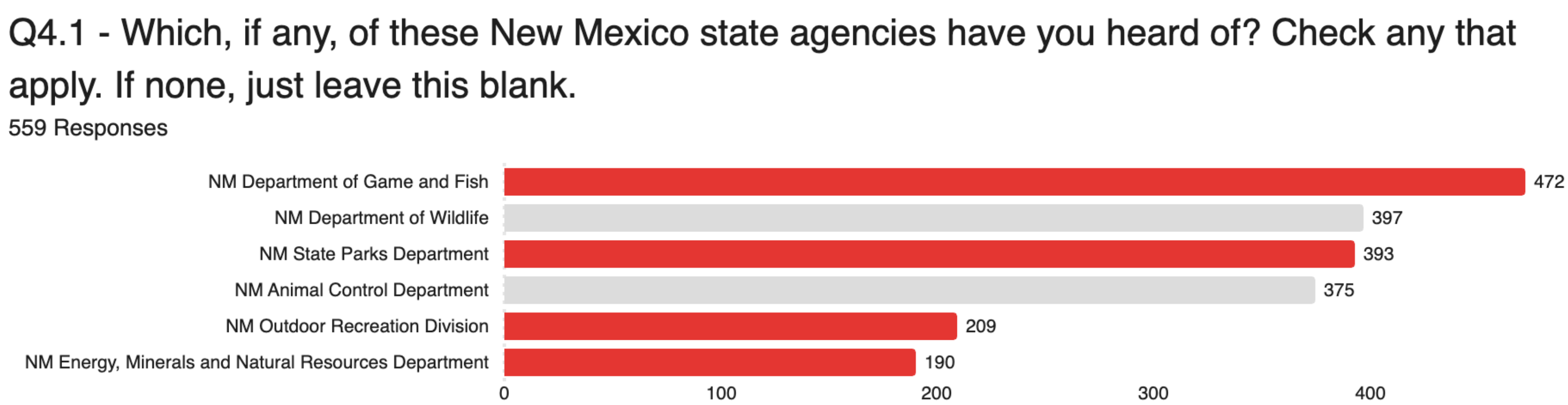
**"Bridge" Activities Between Customers and Non-Customers**
Birding, photography, and hiking are bridge activities that are popular with non-customers. These offer outreach opportunities to convert new customers.

**Universal Activities**
Camping is universally popular and may serve as the best entry point for recruitment, especially with families.

**“I love hiking in New Mexico.  We need to preserve the natural beauty and creatures of our state. ”**
*Smaller city non-customer female, 65 - 74, $25,000 - $49,999*

1.3a

# About Awareness of the Department and vs. Other Departments




## Significant awareness of non-existent agencies

*NM Department of Wildlife*
(Did not exist at time of fielding)

*NM Animal Control Department*
(Municipalities typically handle this.)

These decoy options ranked as some of the most recognized agencies across all geographies, especially in urban areas, where "Wildlife" outperformed real agencies like Outdoor Recreation or EMNRD.

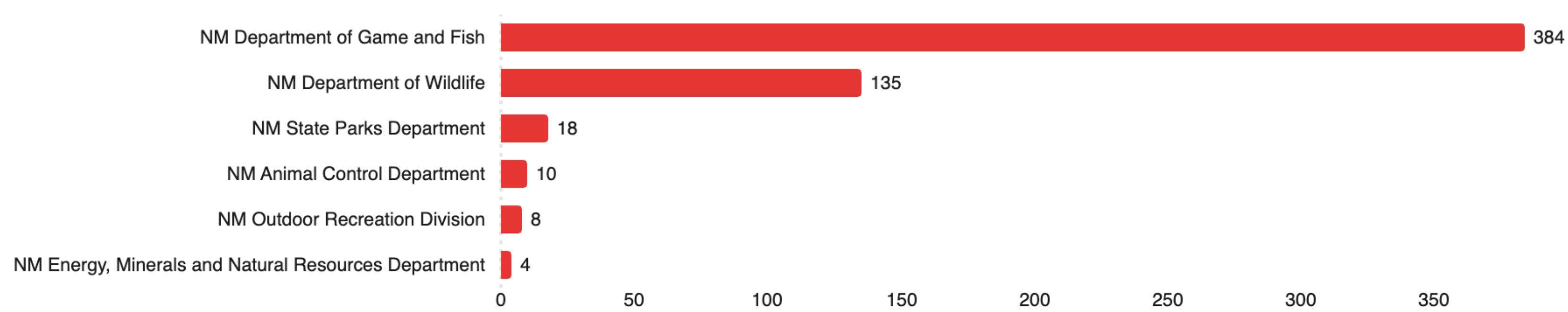
We can **message the department name change using both names**, which would likely positively contribute to overall awareness in subsequent waves.

1.3b

# “Department of Wildlife” Breakout Data

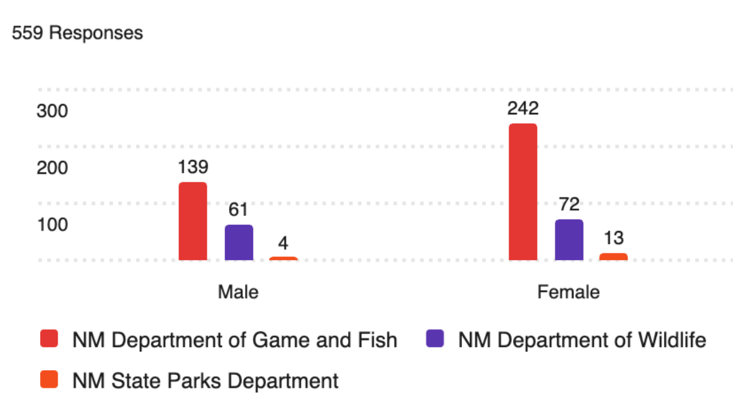
Q4.2 - Which of these New Mexico state agencies do you think is most responsible for protecting the fish and wildlife population in New Mexico?

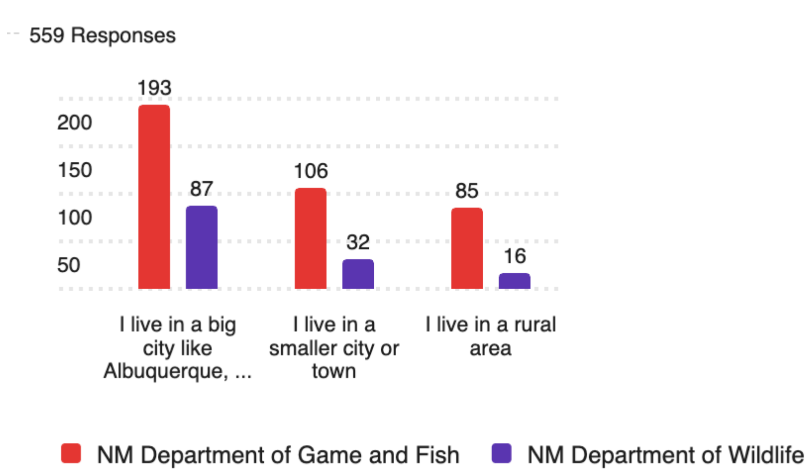
559 Responses




## 22% of non-customers believe a non-existent agency, the Dept. of Wildlife, manages fish and wildlife populations

In subsequent waves, we can build more awareness of the agency and better attribution of its mission by directly messaging that these agencies are the same and have the same mission.



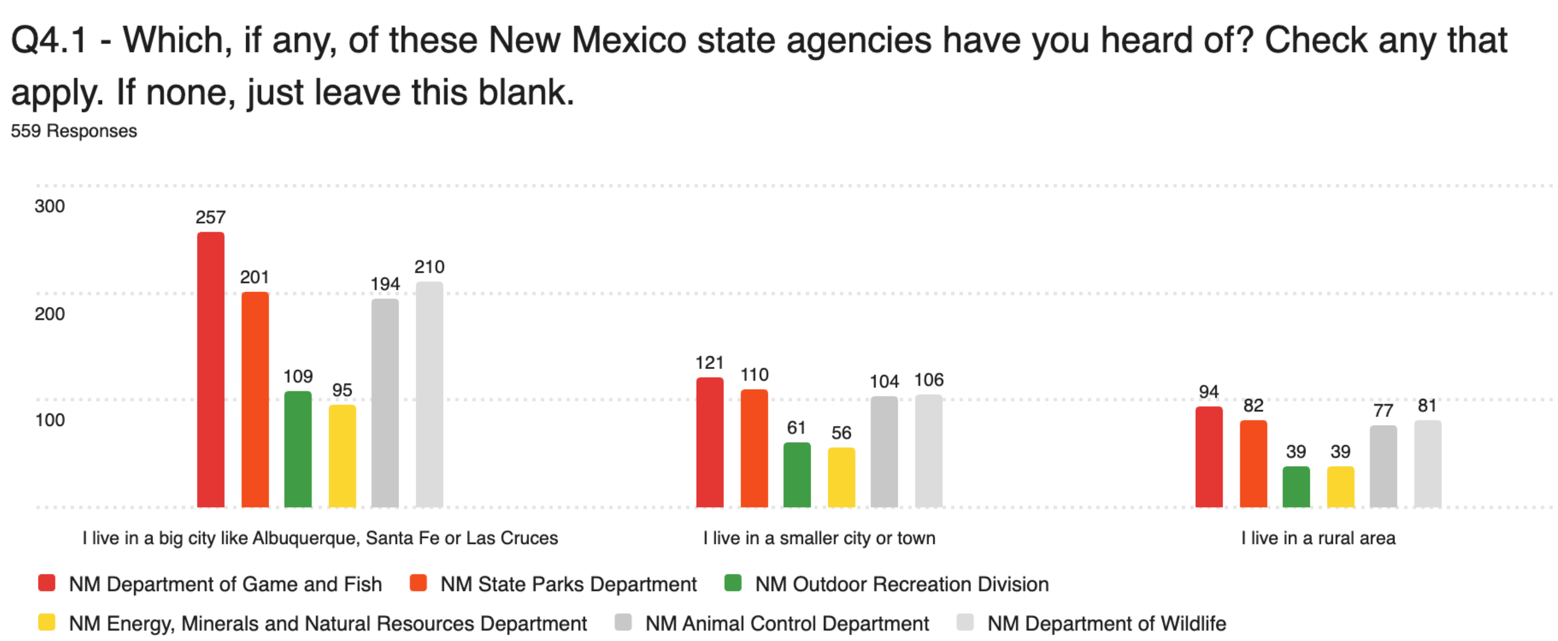




## Urban residents, Females are most likely to select “Wildlife” as primarily responsible over “Game and Fish

Educational campaigns in urban areas (and especially targeting women) may help correct misconceptions.

1.3c

# About Regional Non-Customer Awareness




## Rural Respondents Were Less Likely to Fall for Decoy Agencies

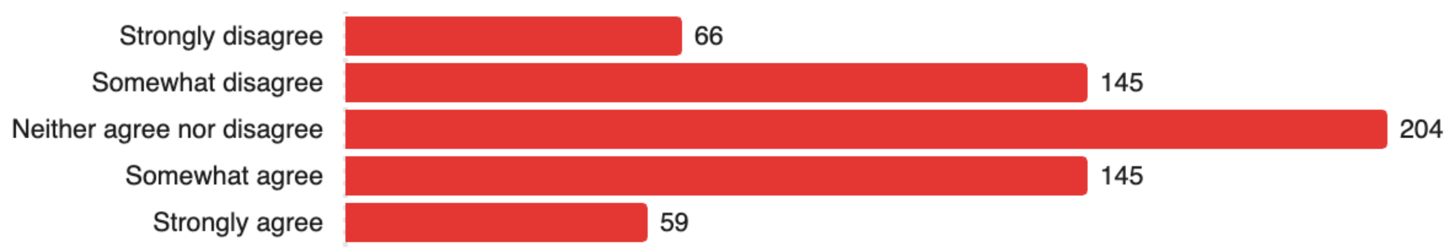
Rural participants chose fake agencies less frequently than urban respondents, likely due to their more direct interaction with the agencies. Conversely, urban respondents were most likely to fall for our fakes, suggesting low awareness of the department and a low understanding of its roles/responsibilities. Using our marketing and communication to address urban residents would significantly contribute to overall agency/mission awareness.

1.3d

# How Non-Customers Feel About How We're Doing Against our Department's Mission

"The government in New Mexico does enough to protect endangered and threatened species."

619 Responses




## Near-even splits between the three groups.

A third of our respondents believe the government does NOT do enough to protect endangered species, and another third are neutral - this should be a core measurement of the I&E efforts moving forward, moving people from disagree/neutral to agree.

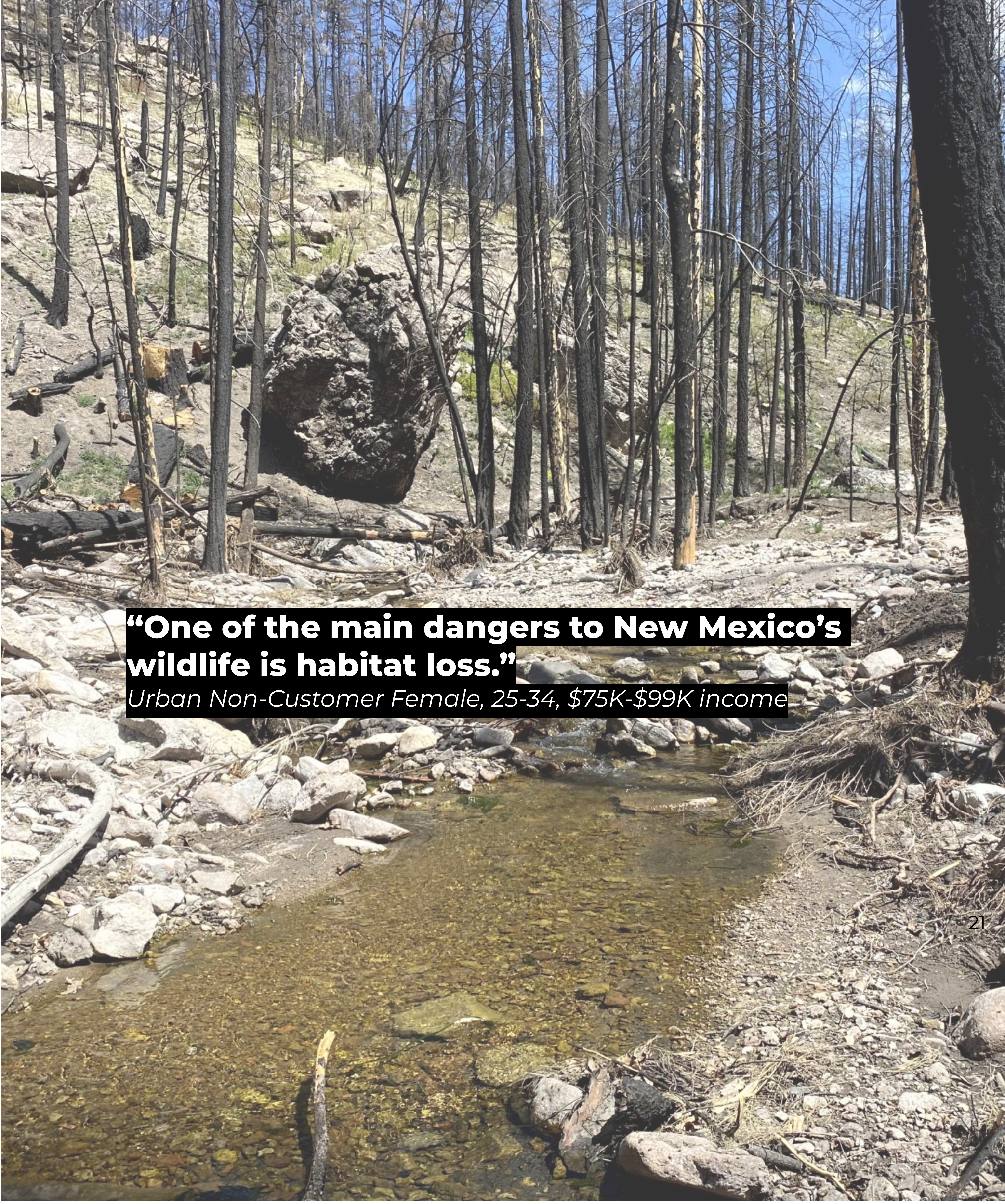
| | % Male | % Female |
|---|---|---|
| **Top 2 Box (Agreement)** | 37.4% | 30.8% |
| **Bottom 2 Box (Disagreement)** | 34.9% | 32.7% |
| **Neutral** | 27.7% | 36.5% |

## Gender splits for the question show more differences

Males are significantly more likely to agree (37%) than females (31%) that the government is doing enough. Females are more likely to stay neutral (37% vs 28%).

# 2. Conservation

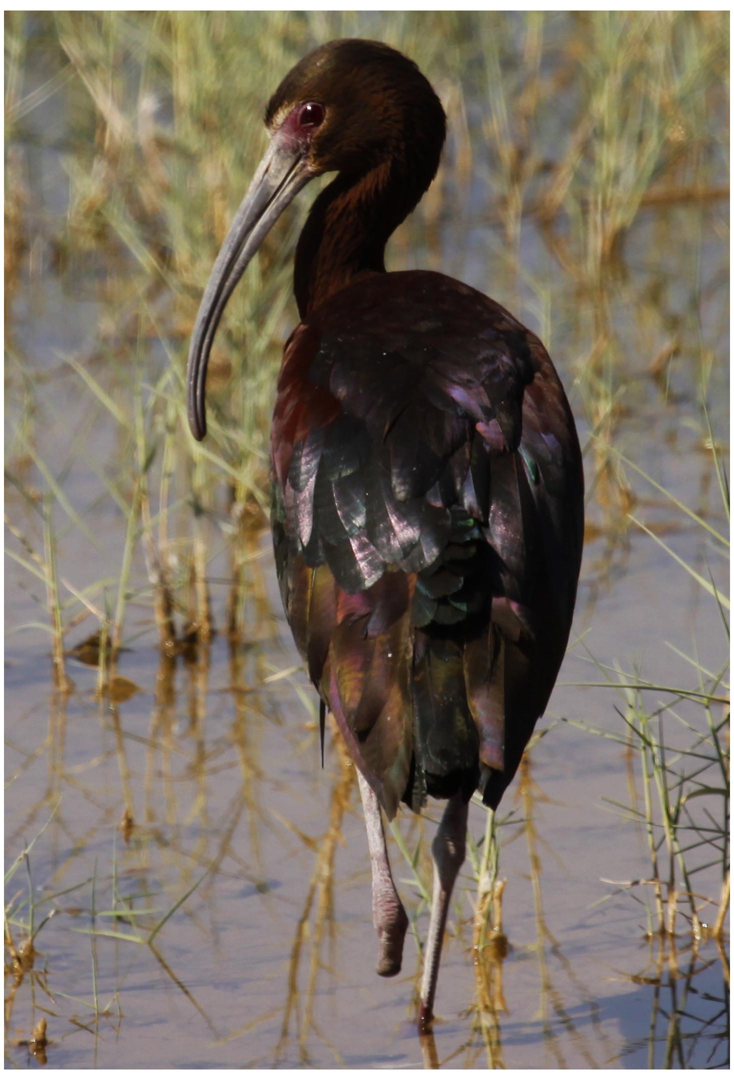
2.1 Conservation Issue Engagement
2.2 Conservation Contribution
2.3 Consumption Attitudes



**“One of the main dangers to New Mexico’s wildlife is habitat loss.”**
*Urban Non-Customer Female, 25-34, $75K-$99K income*

2.1a

# How Non-Customers "Keep Up To Date" with Wildlife Issues



### Most Non-Customers Still Try to Stay "Up To Date" on Conservation Issues

Almost half of the non-customer sample indicated they try to keep current on conservation issues.  Our opportunity is to engage these people and direct them towards conservation participation.

| | |
|---|---|
| **"Agree"** | **45.0%** |
| **Disagree"** | **26.6%** |
| Neutral | 28.4% |

### Urban Density Indicates Engagement on Conservation Issues Among Non-Customers

Big city dwellers are 50% more likely to be in the Top 2 Box than rural respondents (61.6% vs. 40.4%).

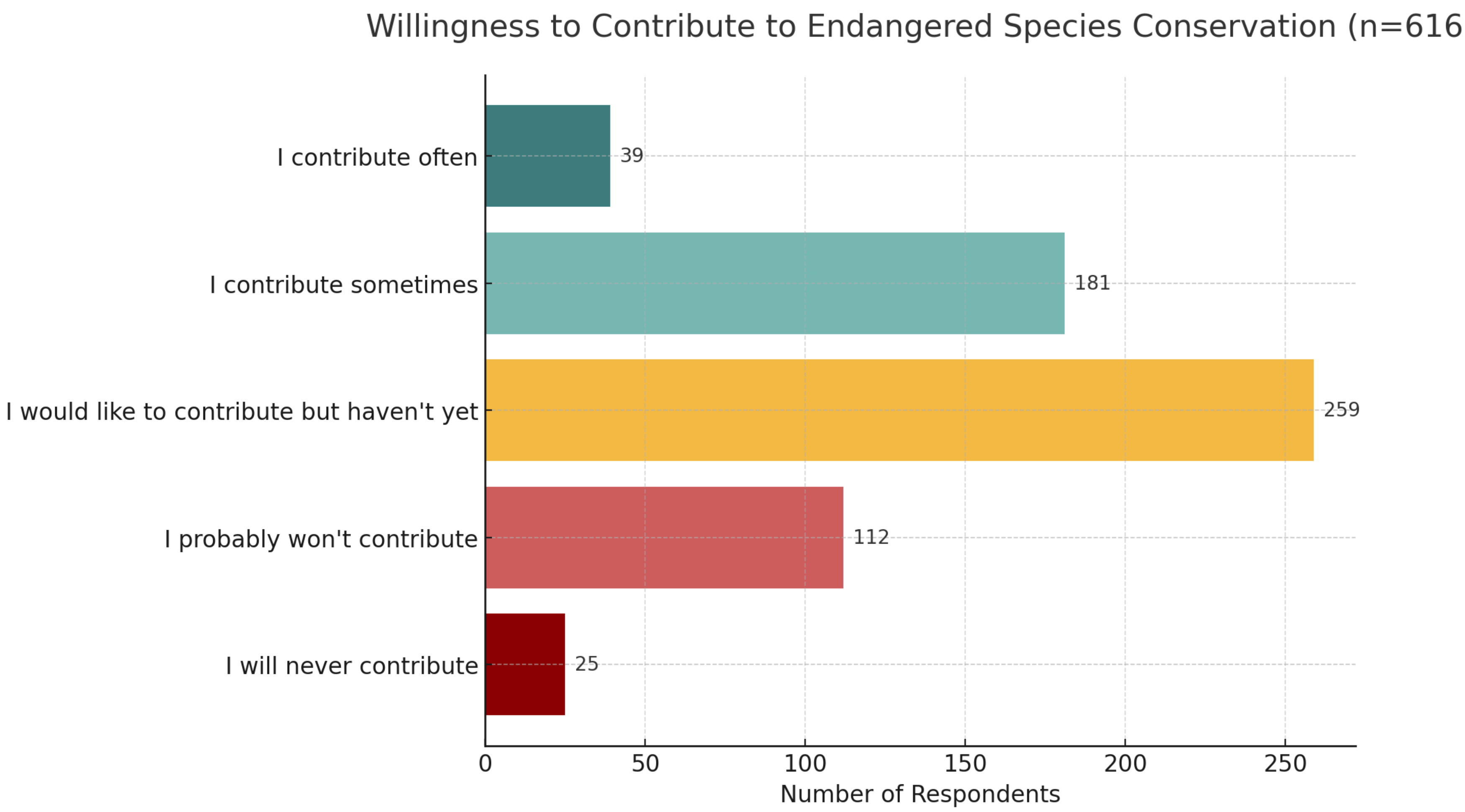
| Location | Agree | Disagree |
|---|---|---|
| **Big city** | 61.6% | 38.8% |
| **Smaller city or town** | 50.0% | 27.6% |
| **Rural area** | 40.4% | 22.1% |

**“New Mexico is one of the most biodiverse states in the US. Wildlife conservation, as well as hunting/fishing management, is very important.”**
*Smaller City Non-Customer Male, 35-44, $125K+ income*

23

2.2a

# How Non-Customers Feel About Contributing to Wildlife Causes




## Although Majority Express Supportive Intent, Action is Lacking

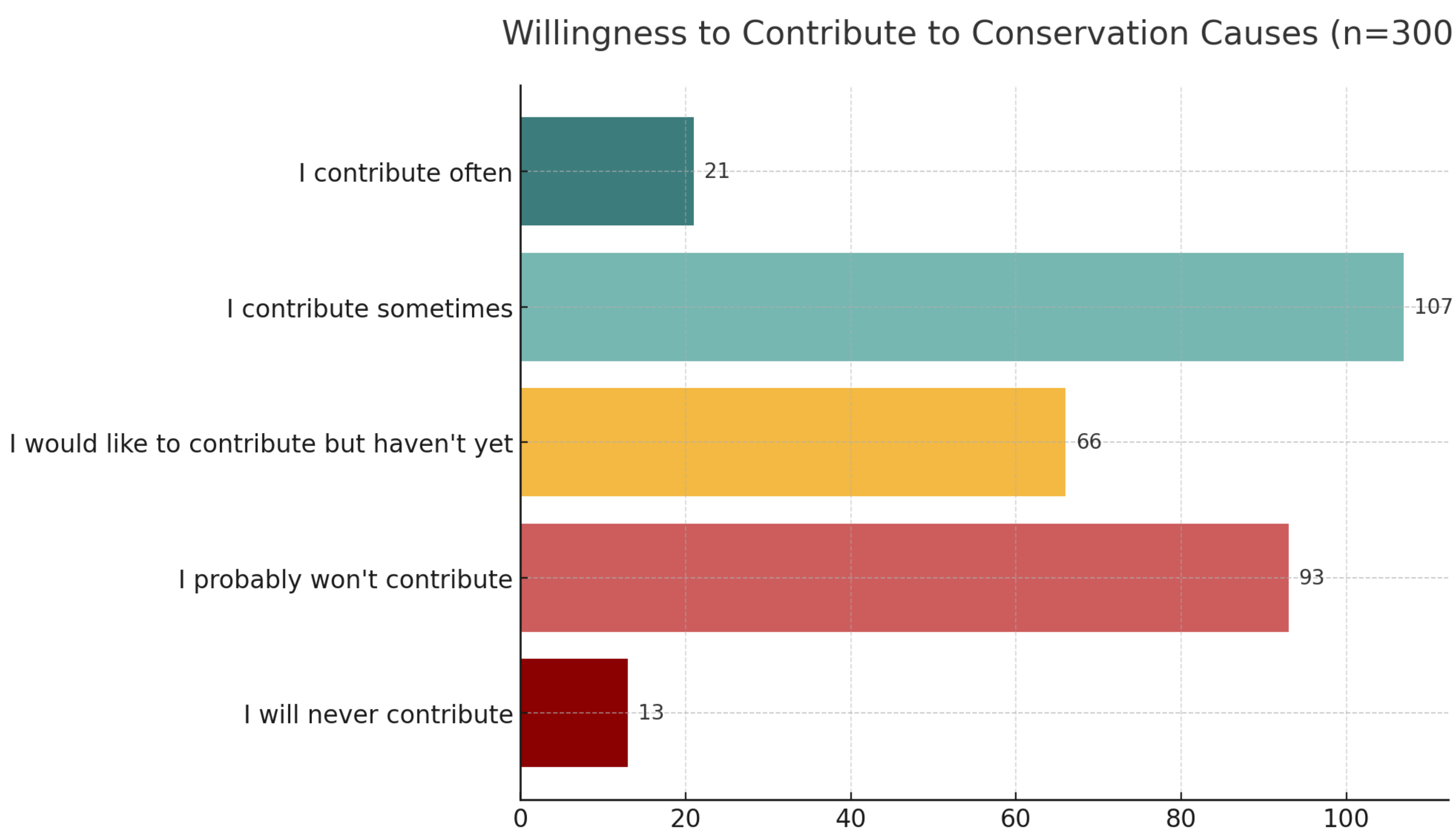
42% of the surveyed community selected "I would like to contribute but haven't yet. That's 4 in 10 respondents expressing interest without action. There's an opportunity to set up low-barrier, consistent methods to turn passive community members into active contributors.

## Total Support is the Overwhelming Majority

Around ~78% of the total sample answered "often," "sometimes," or "would like to." This is a massive pool of conservation-aligned values, reiterating that our goal is to convert those who are passive about wildlife causes into active donors.

2.2b

# How Customers Feel About Contributing to Wildlife Causes




## There Remains a Large Presence of Interested, yet Passive, Individuals

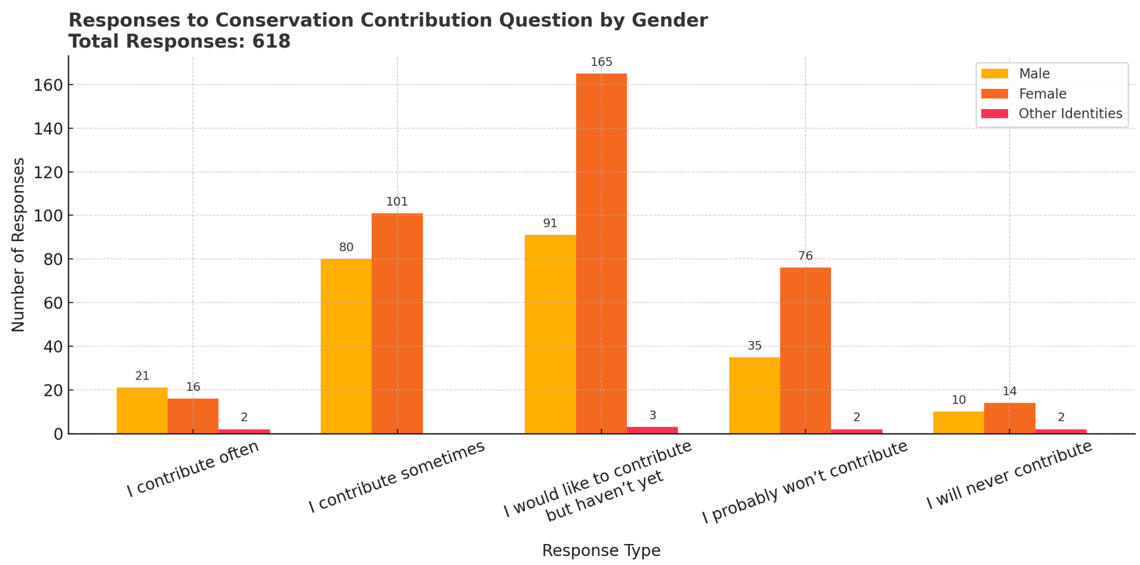
Compared to non-customers, there's a larger ratio of "would like to" but are hesitant. Engaging our customer base with continued targeted messaging about how they can support wildlife is crucial to increasing the number of active contributors.

## Soft Non-Commitment is Notable

31% of customers say the "probably won't contribute". Although they express disinterest, they aren't adverse to contributing. There's room to change customers' perceptions by increasing messaging around the various options of how they can donate or participate.

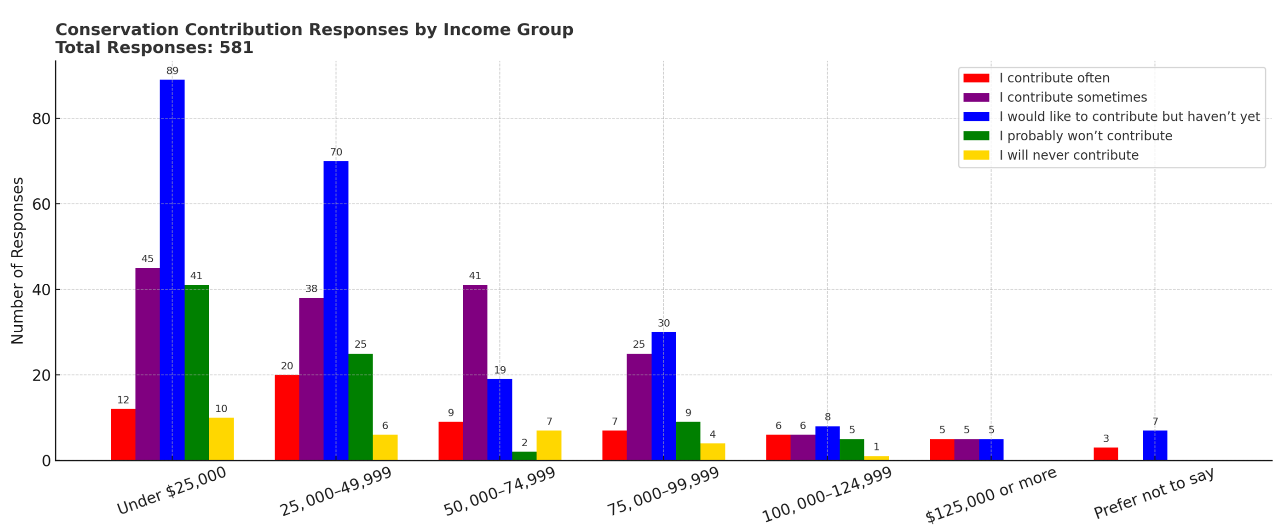
2.2

# Non-Customer Attitudes Towards Conservation Contribution - Demographics




## Interest in Conservation Contribution is High for Both Genders.

44.4% of female respondents said they "would like to contribute but haven't yet", whereas only 4.3% say they contribute often. On the contrary, 38.4% of males said "would like to contribute but haven't yet", 8.9% answered they contribute often (double the amount of females)

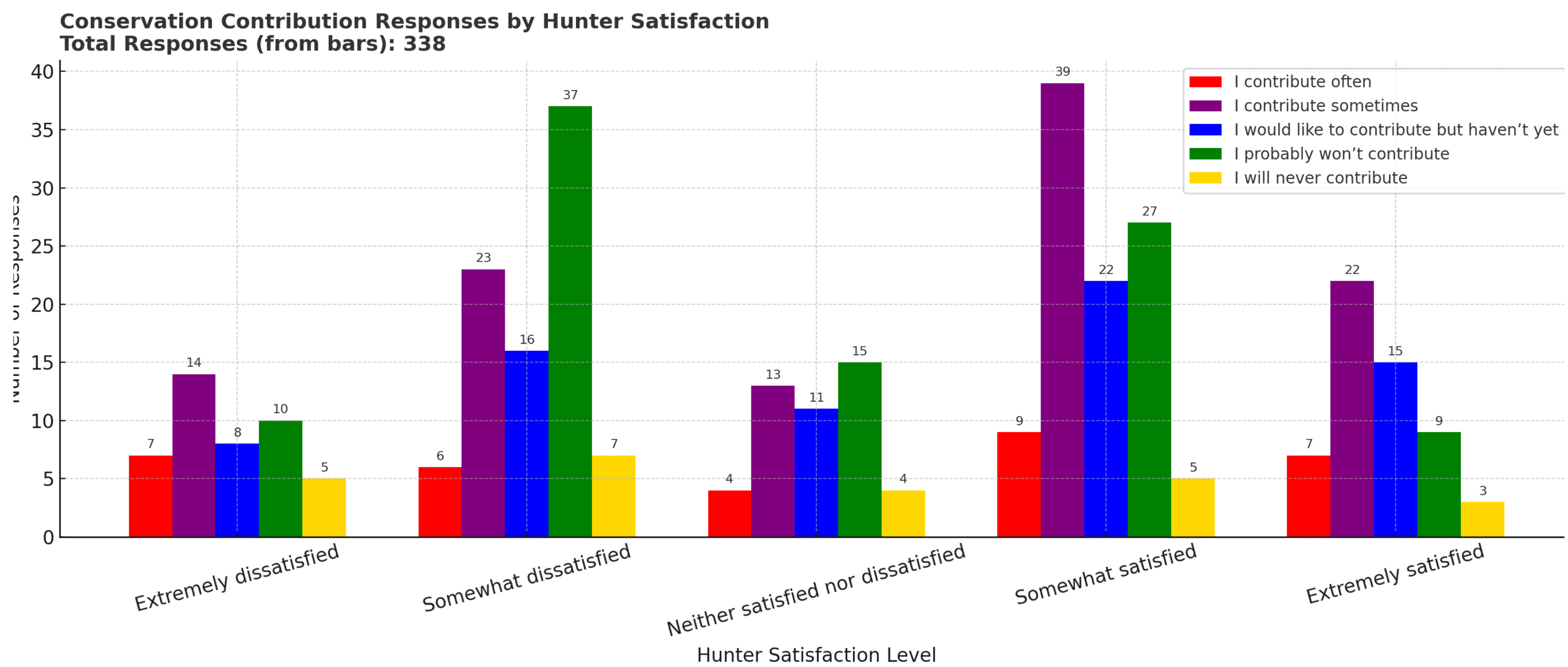



## Low Income Doesn't Impact Desire to Contribute

Our highest response group was low-income. 45.2% of respondents "would like to contribute but haven't yet". Turning casual contributions into consistency with lower-income groups is an opportunity. Positioning contribution as accessible, dignified, and impactful, even without money

2.2d

# Hunter Attitudes About Conservation Contribution, by Satisfaction Level



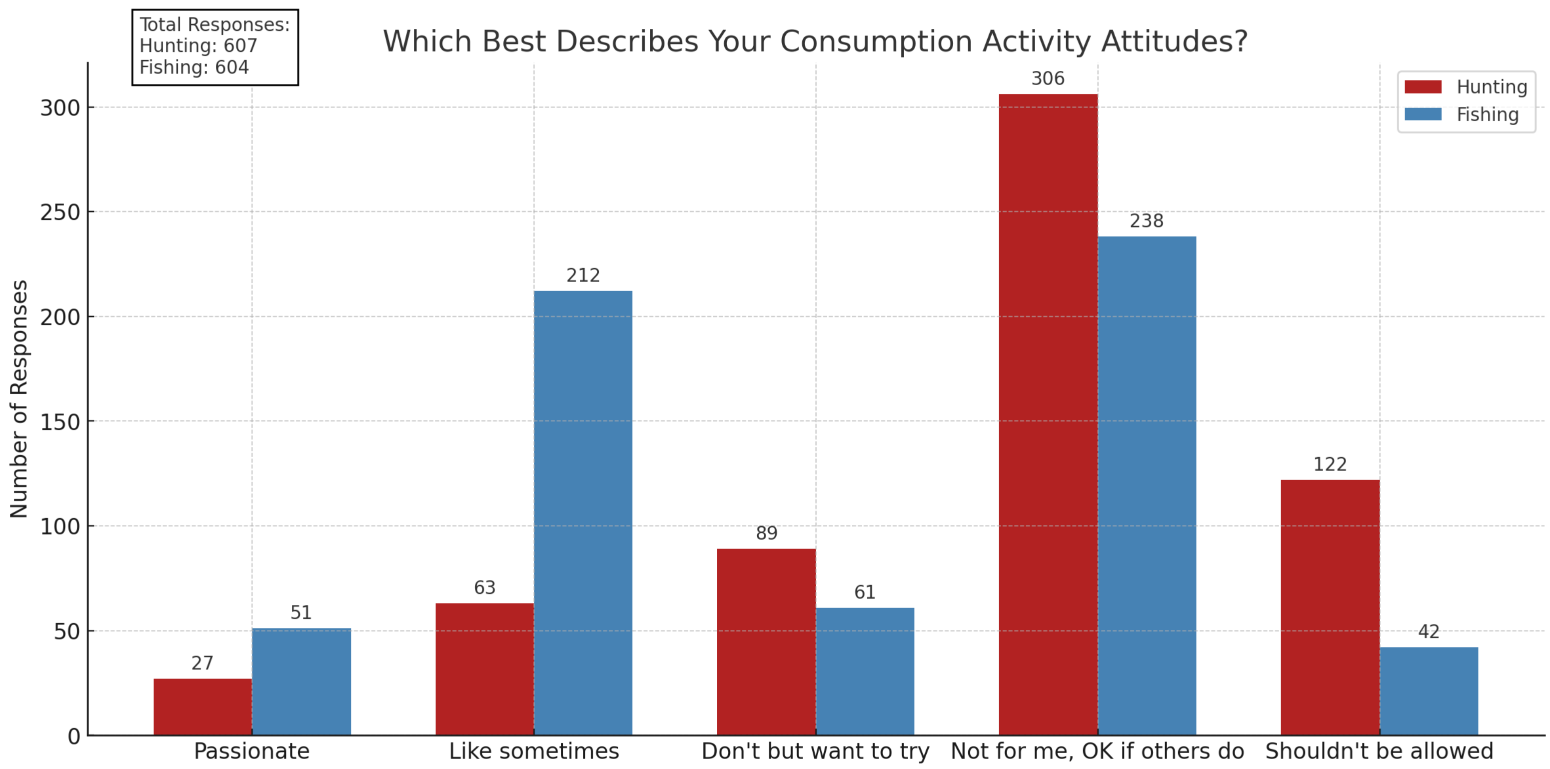

## Participation Satisfaction Impacts Desire to Contribute

"I contribute sometimes" is highest among Extremely Satisfied (39.3%) and Somewhat Satisfied (38.2%) respondents. Meanwhile, somewhat dissatisfied hunters have the highest "I probably won't contribute" rate at 41.6%. Although responses vary by hunting satisfaction, "Would like to contribute" is common across all satisfaction levels, between 18% and 27% across all categories. Even among the most disengaged, many still want to help.

**“More public information should be available on how hunting and fishing helps in conservation”**
*Urban Non-Customer Male, 35-44, under $25K income*

2.3a

# Consumption Attitudes, Hunting and Fishing




## Opposition to Hunting Is Nearly Triple That of Fishing

Upon comparison, there's nearly a 3:1 ratio in disapproval, citing clear evidence that hunting carries a heavier burden amongst the community.

## Fishing Attracts 2x More Recreational Enthusiasts Than Hunting.

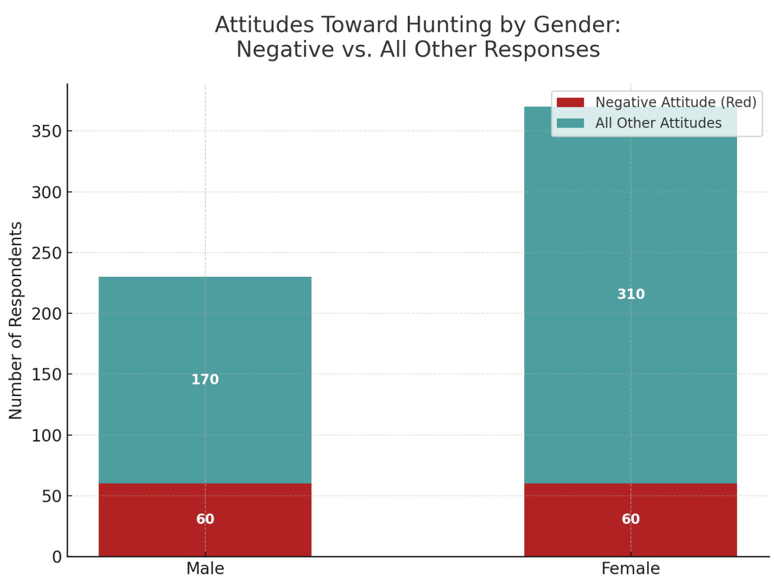
Respondents who are "passionate" or "like [it] sometimes" total 263 for fishing (43.6%) vs. just 90 for hunting (14.8%). That's nearly a 3:1 ratio of active recreational interest, meaning there's a significant presence of fishing enjoyers who don't quite identify as a Department customer.

## More People Want to Try Hunting vs. Fishing—But They're Not Yet Bought In

Hunting is already tolerable to the majority of our community respondents. Messaging around making hunting more accessible would allow the department to convert interested parties into passionate participants.

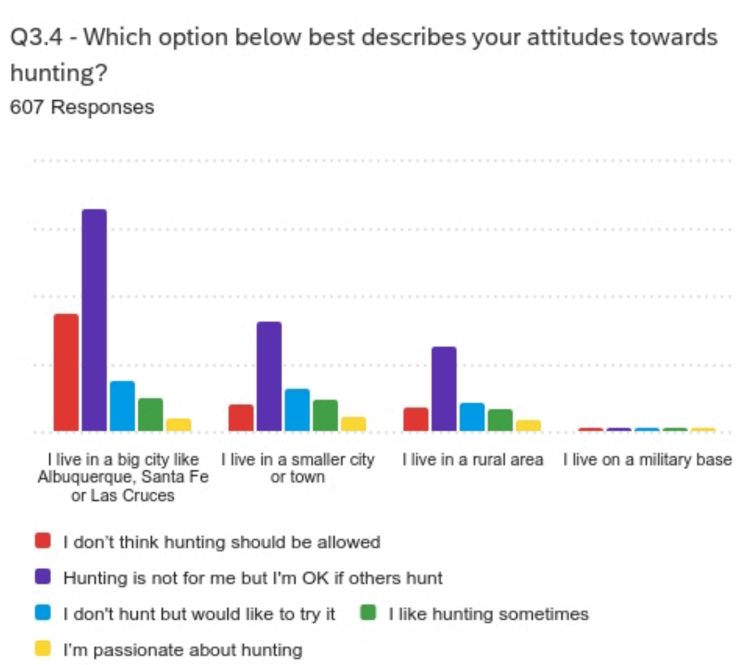
2.3b

# Consumption Attitudes, Hunting and Fishing - by Gender and Region




## Female respondents are significantly more tolerant or accepting of hunting

Despite identical raw counts (60 each), the proportion of negativity is higher among men due to a smaller male sample size. Although a large portion of surveyed females have no interest in hunting participation, they might be aware of its cultural or conservation importance




## Residents who don't participate are largely tolerant.

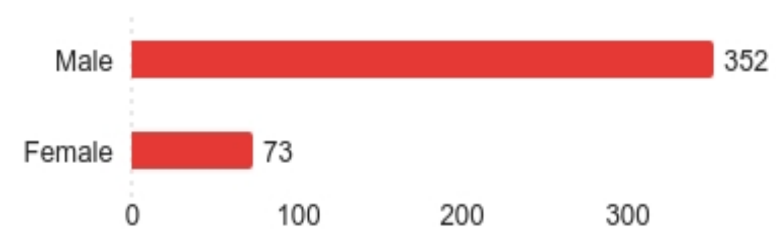
Although most Urban residents don't participate in hunting, they tolerate those who do. Still, within the regional subgroups, the most significant opportunity to shift sentiment is with Urban residents who think hunting should be banned.

Negative sentiment around hunting amongst smaller towns and rural areas is much lower, proportionally, compared to urban areas. Hunting's viability for sustenance and its role in cultural heritage are contributive factors.

# 3. Customer

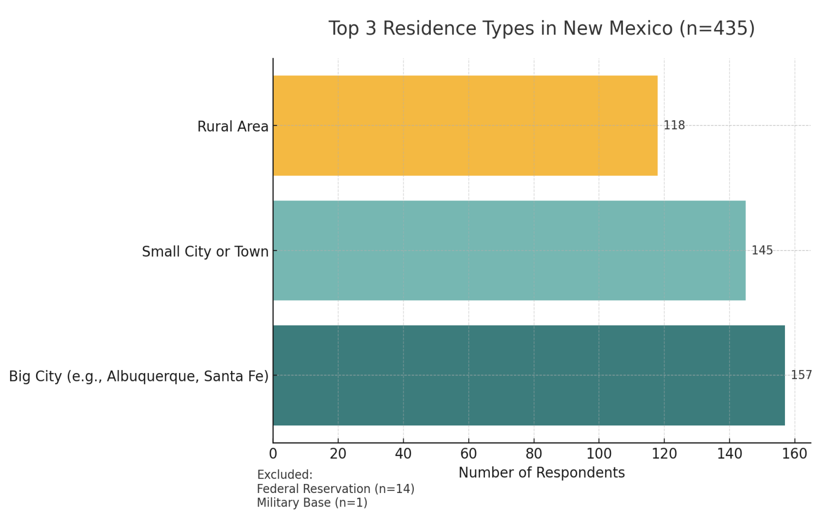
3.1

# Overall Customer Profiles



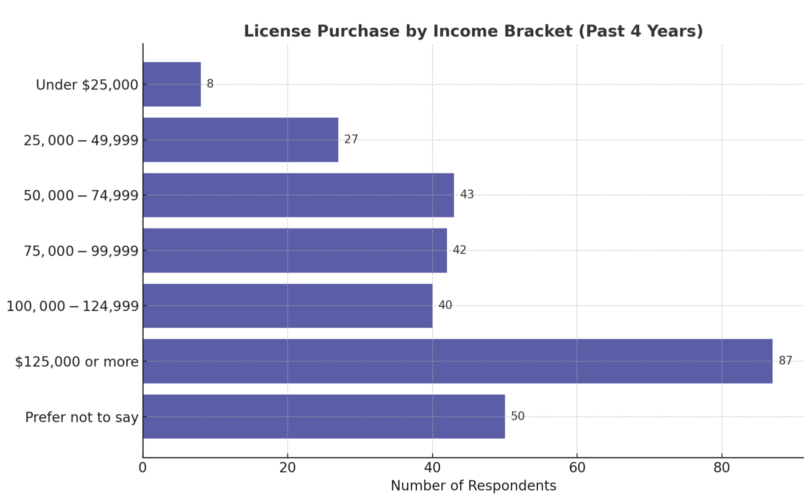

## Majority Male, With Opportunity to Attract Female

Most respondents identify as male, over 4 in 5 or 82.4%. Although female customers make up about 17.1% of total respondents (around 1 in 6 representation), we'll want to continue to track the growth/decline of female hunters in New Mexico.




## Even Distribution of Regional Responses

Urban-based (36.1%), small city/town (33.3%), and rural (27.1%) respondents balance each other out at about 1/3rd of the total customer responses each.

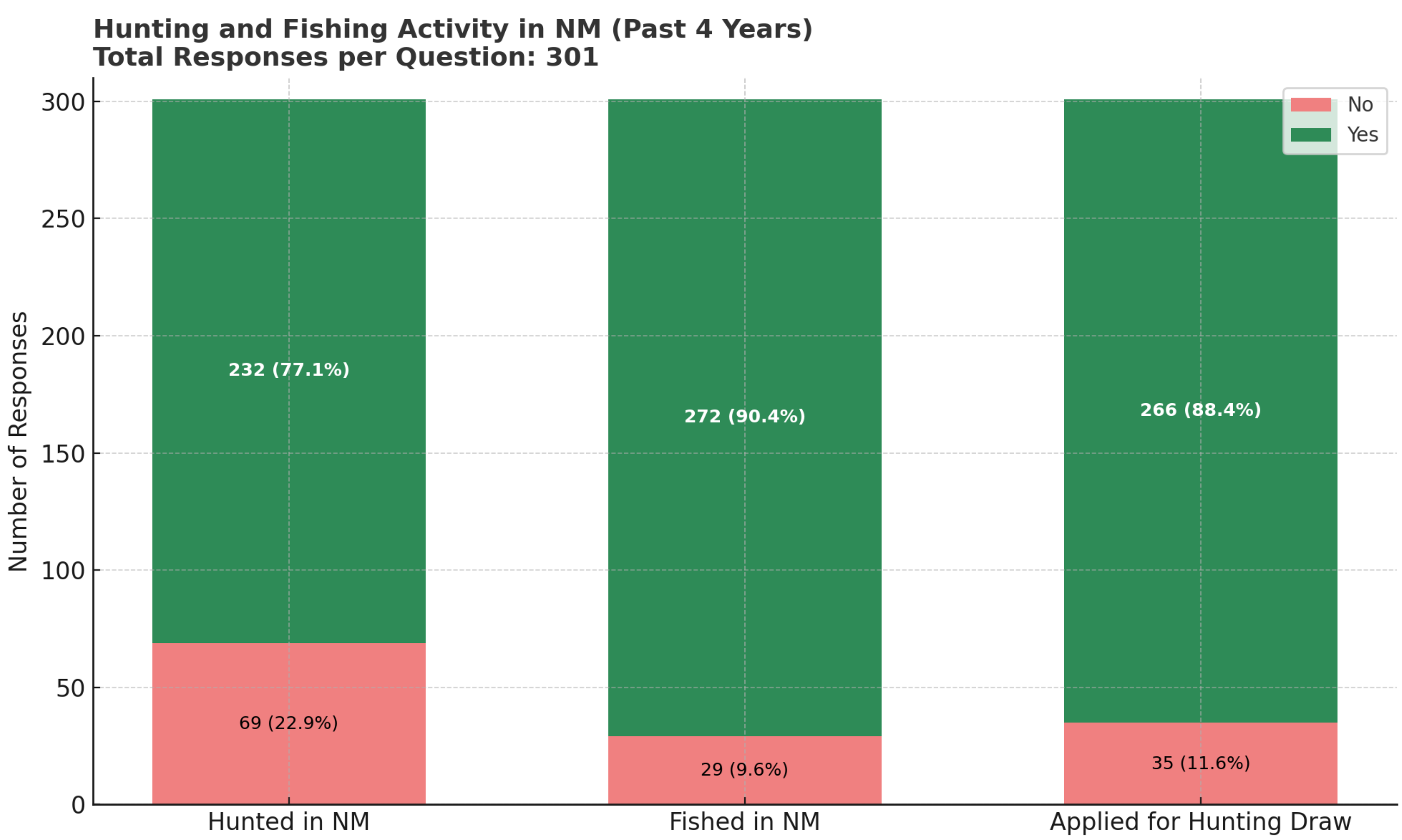



## Income Skewed Higher, but Middle Base is Core

Although the $125,000+ income group had the highest license purchase rate at 29%, the middle combined $50K–$99K segments account for 28% of purchases.

3.2

# Customer Participation with Core Products



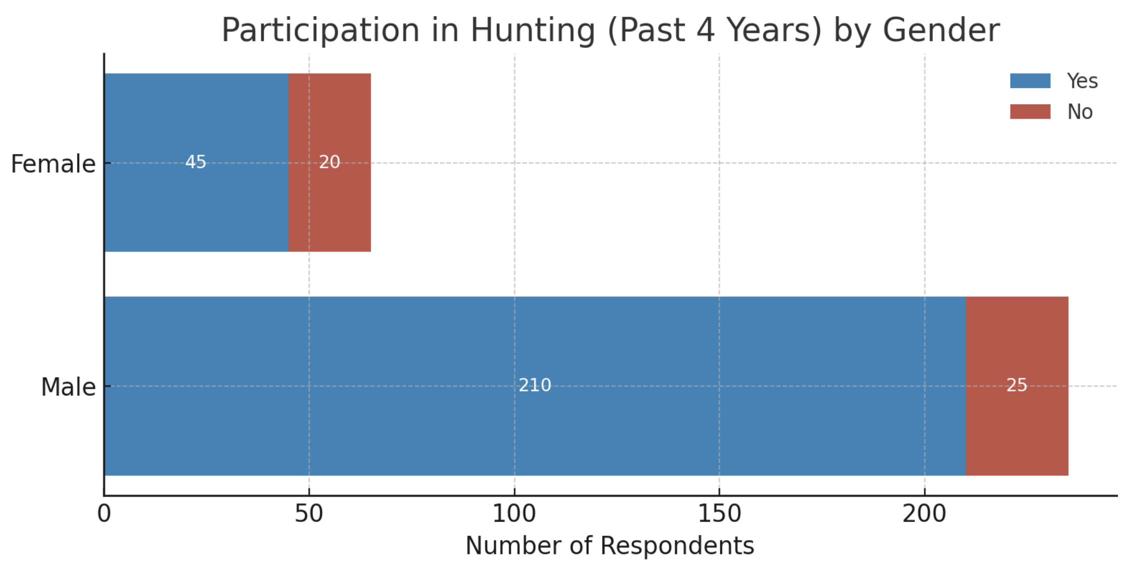

## Customers are Highly Engaged with our Core Products

While 77% of respondents hunted, over 90% have fished, suggesting that fishing may be a more accessible or culturally widespread outdoor activity.

88.4% of respondents applied for a hunting draw, suggesting that the hunting audience is process-engaged, responsive to logistics, and likely to track deadlines, regulations, or seasonal info.

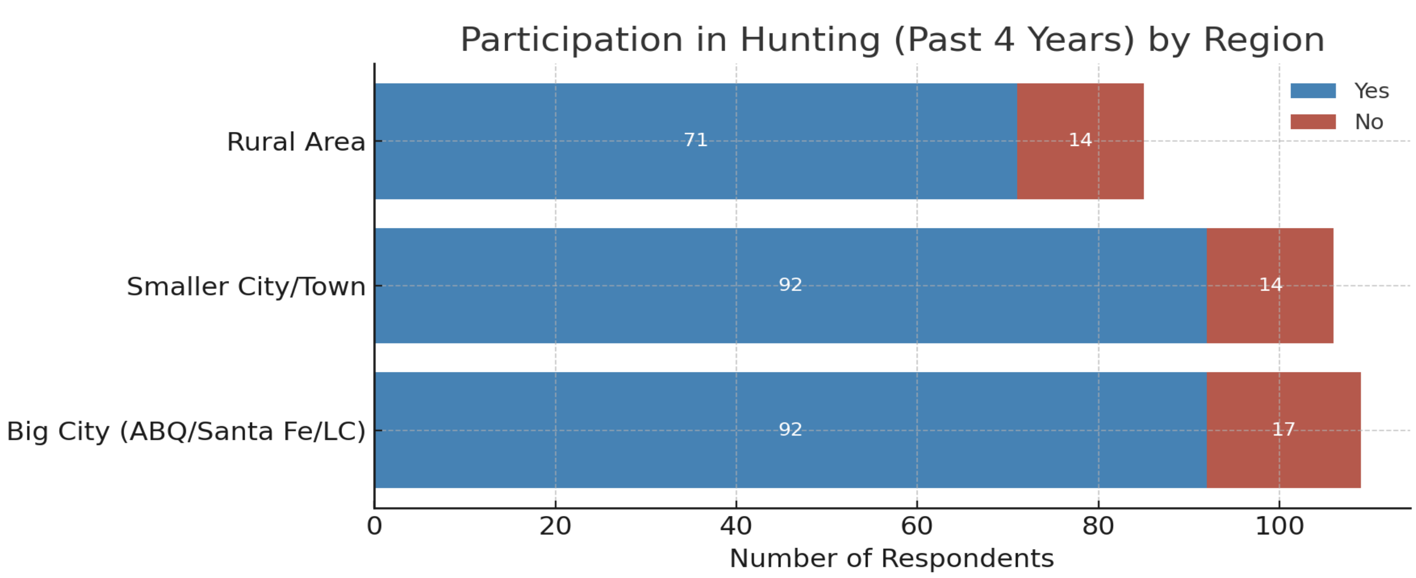
3.3a

# Hunter Breakout, By Demographic




## Gender Disparity in Hunting Participation Remains High

Despite moderate female engagement, surveyed female respondents also show most hunting participation (45 Yes vs. 20 No). Hunting in New Mexico is a male-dominated activity, with male respondents over four times more likely to have hunted in the past four years. Promoting female participation in hunting is conducive to tracking gender disparity.

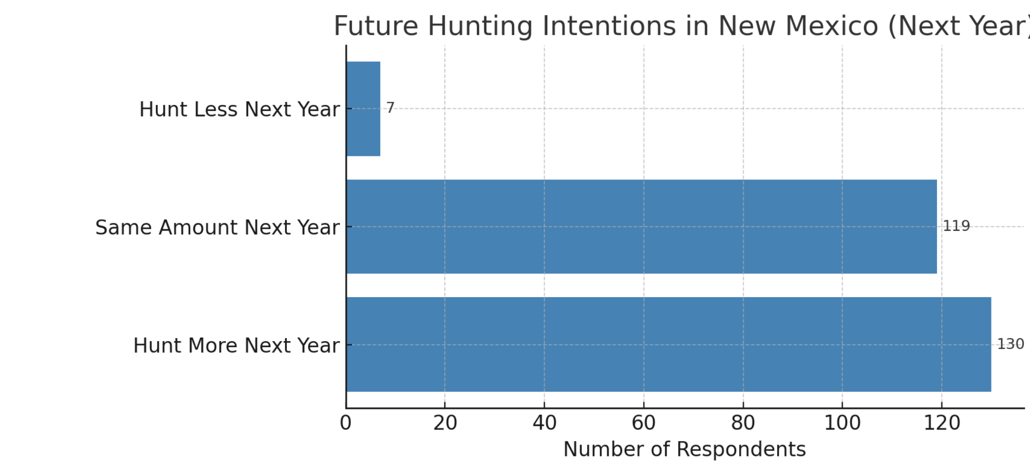



## Hunting is Popular Across All Regions

Each region saw over 83% of respondents say “Yes” to having hunted. Hunting is widely normalized, regardless of Geography. This is a healthy metric as the department balances communication efforts.

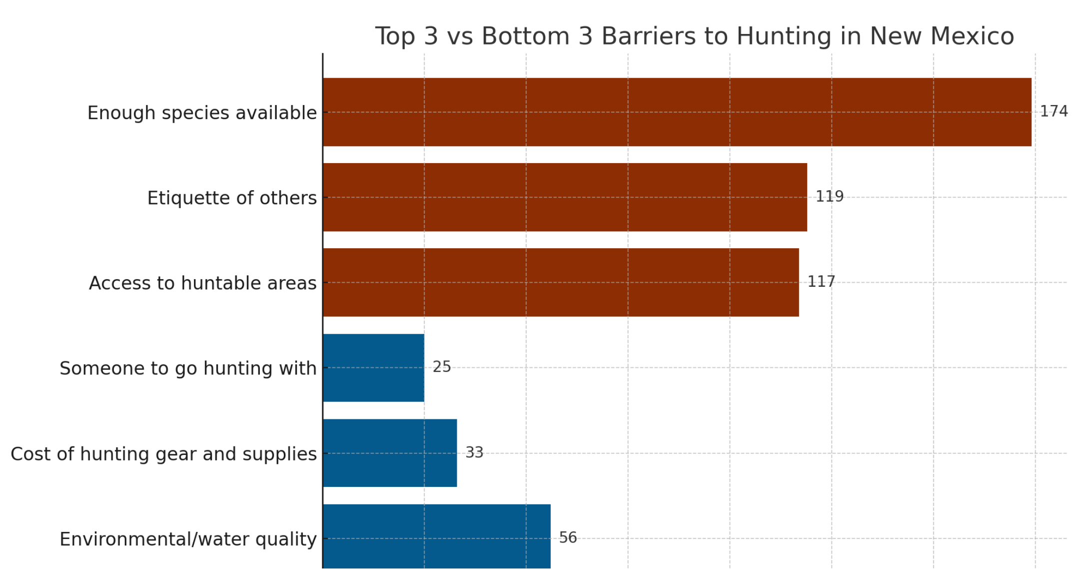
3.3b

# Hunter Breakout, By Participation Frequency




## Hunting Participation Likely Won't Slow Down

97% of respondents (249 out of 256) plan to hunt the same amount or more next year. This optimism aligns with earlier findings: 87% of recent hunters expressed satisfaction with the department. Overall, hunters are happy with the department's mission and strive to continue (or increase) their activity.

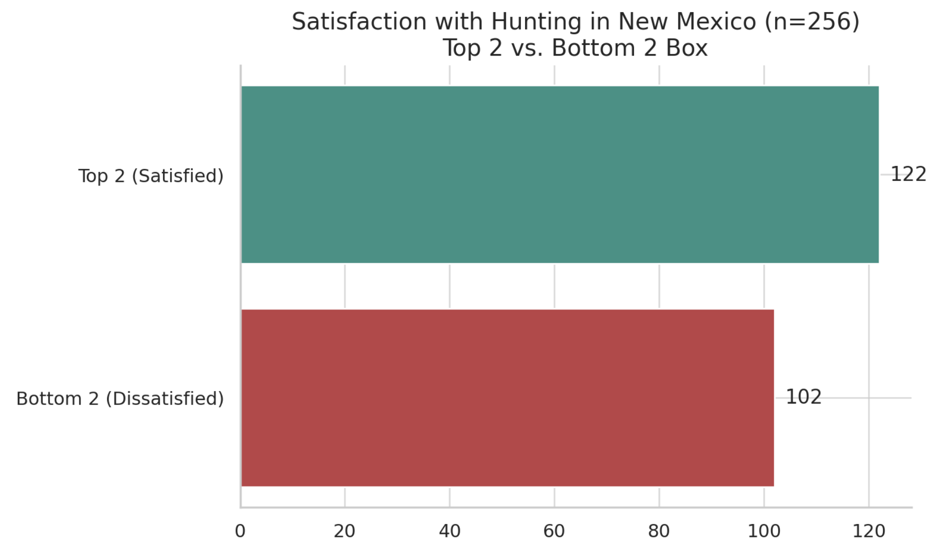



## Our Customer Cares About Holistic Ecosystem Management

Hunters' top concern being "enough species available" (174 selections) aligns directly with biodiversity and population health. From there, area management and social behavior suggest that stakeholders prioritize effective coordination and public-use arbitration.

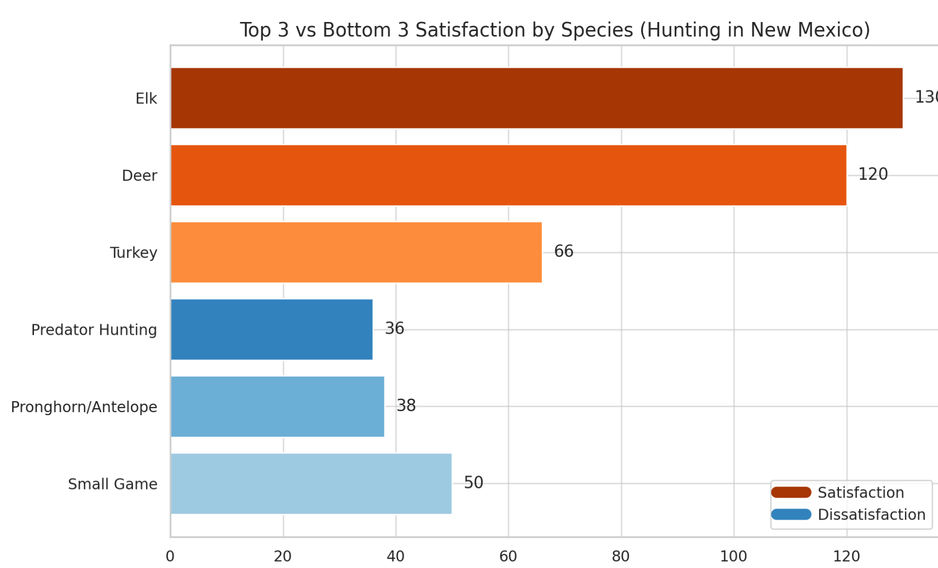
3.3c

# Hunter Breakout, By Satisfaction and Species Participation




## Overall Satisfaction Leads by 20 Points

With 48% of hunters in the Top 2 Box and 40% in the Bottom 2 Box, overall sentiment leans positive but not overwhelmingly. This is a divided base with room to grow engagement through improvements or communications. There's a pattern of customers with a stronger lean toward moderate satisfaction, with notable drop-offs at the extremes.

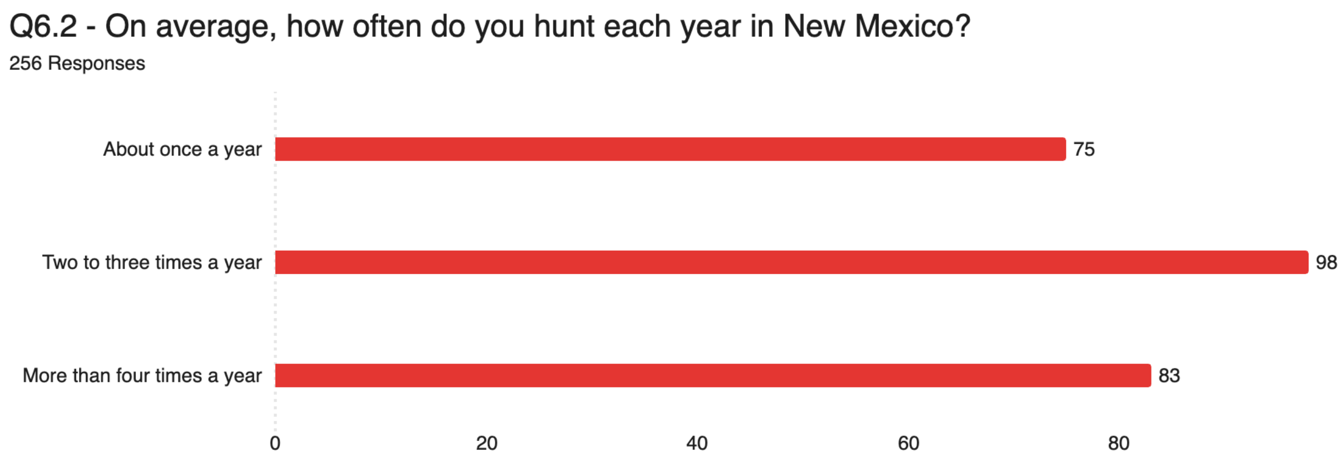



## Big Game Creates Polarity

While Elk had the highest response rate for satisfaction, it's worth noting its polarization, as elk hunters also reported an almost 1:1 dissatisfaction rate. More so, small-game results may suggest an over-performance in extensive game management but underperformance in alternative hunting avenues

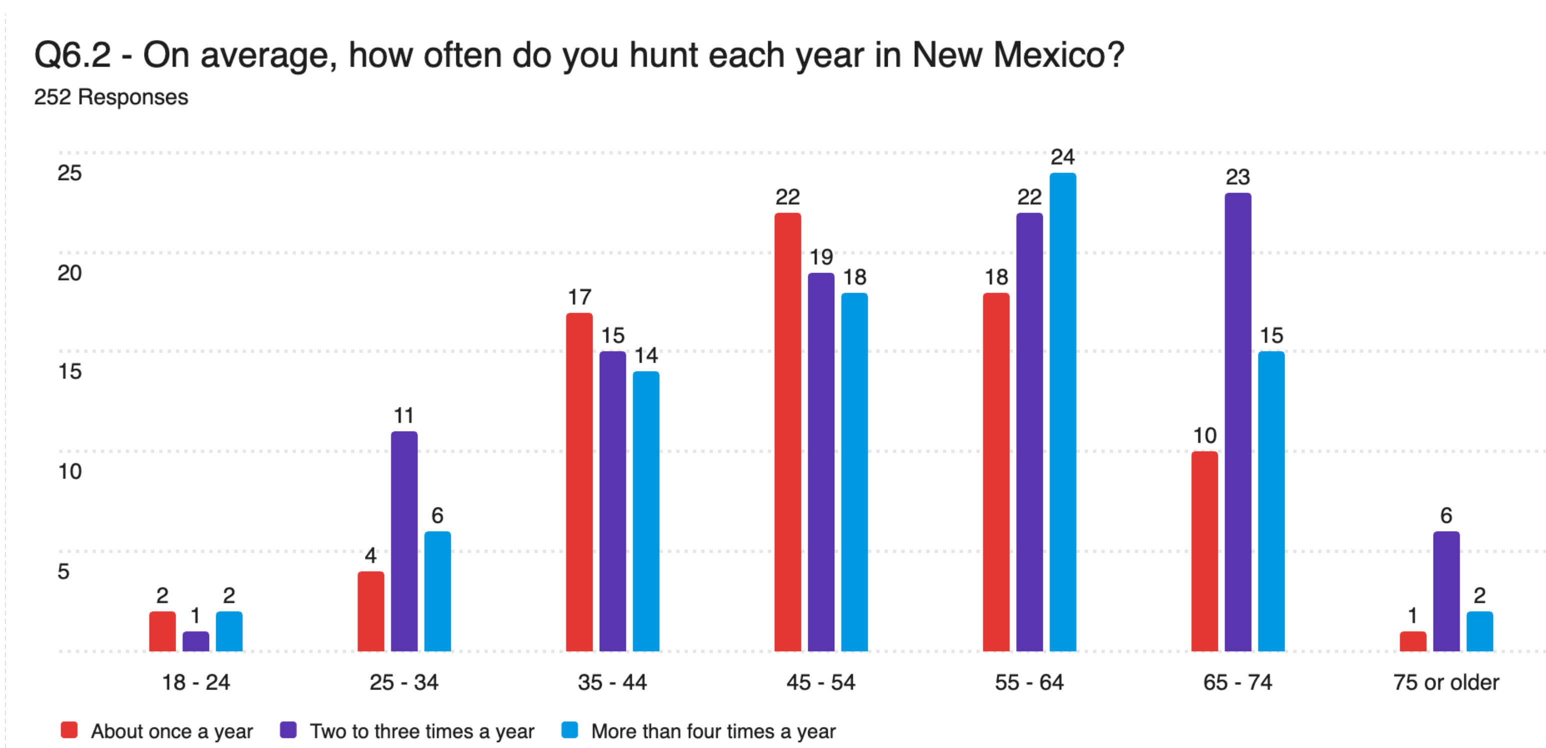
3.3d

# Hunter Breakout, Frequency of Hunts




## Overall, Hunting Frequency is Evenly Split Between the three groups

About one third of respondents hunt frequently, with another third being somewhat frequent, and the last third being very frequent.




## Our over-55 customer group interacts far more heavily than younger groups.

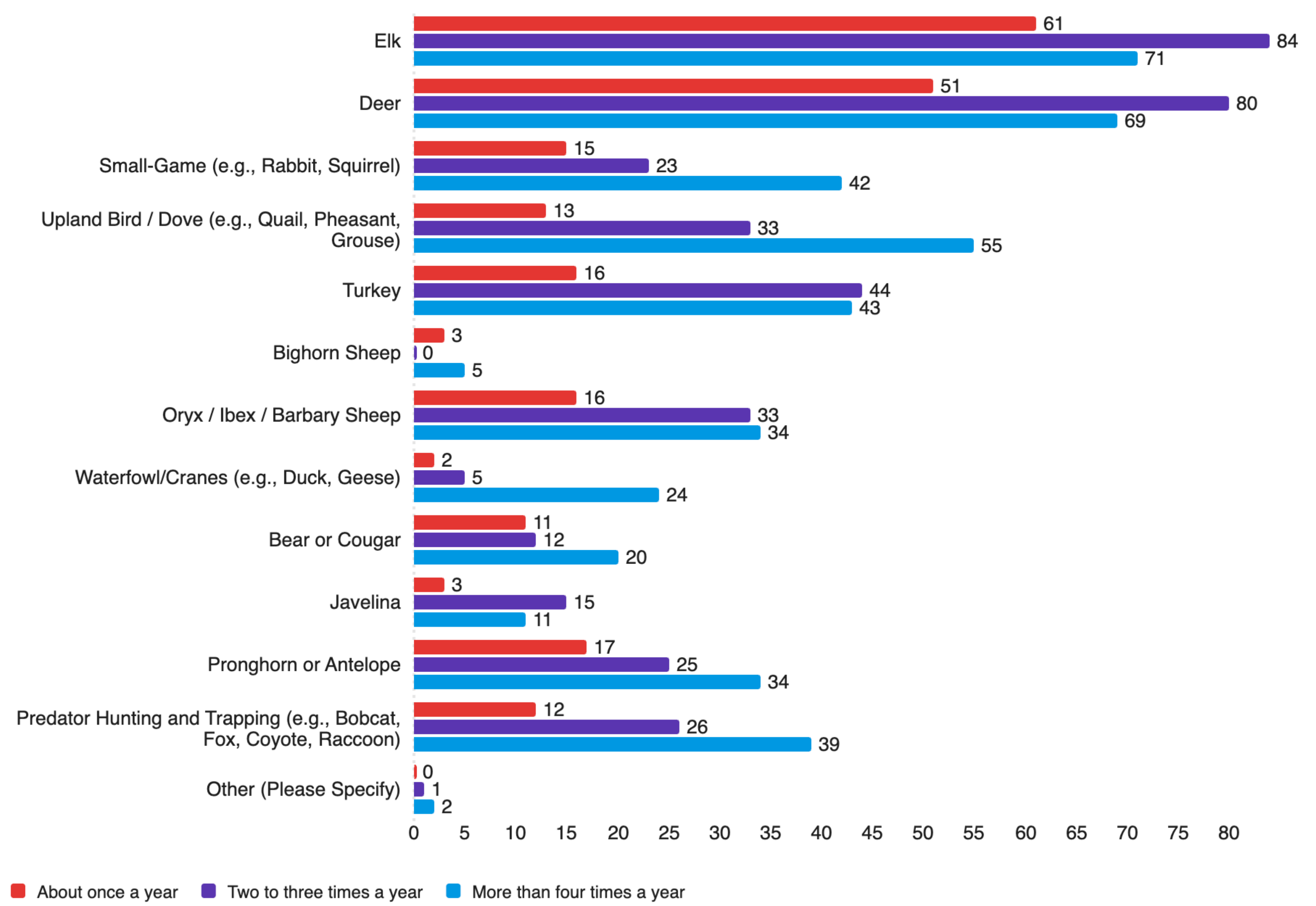
This is likely due to both available time and the overall decline in popularity of hunting in the past few decades.

3.3e

# Hunter Breakout, Frequency of Hunts by Species

Q6.2 - On average, how often do you hunt each year in New Mexico?

255 Responses

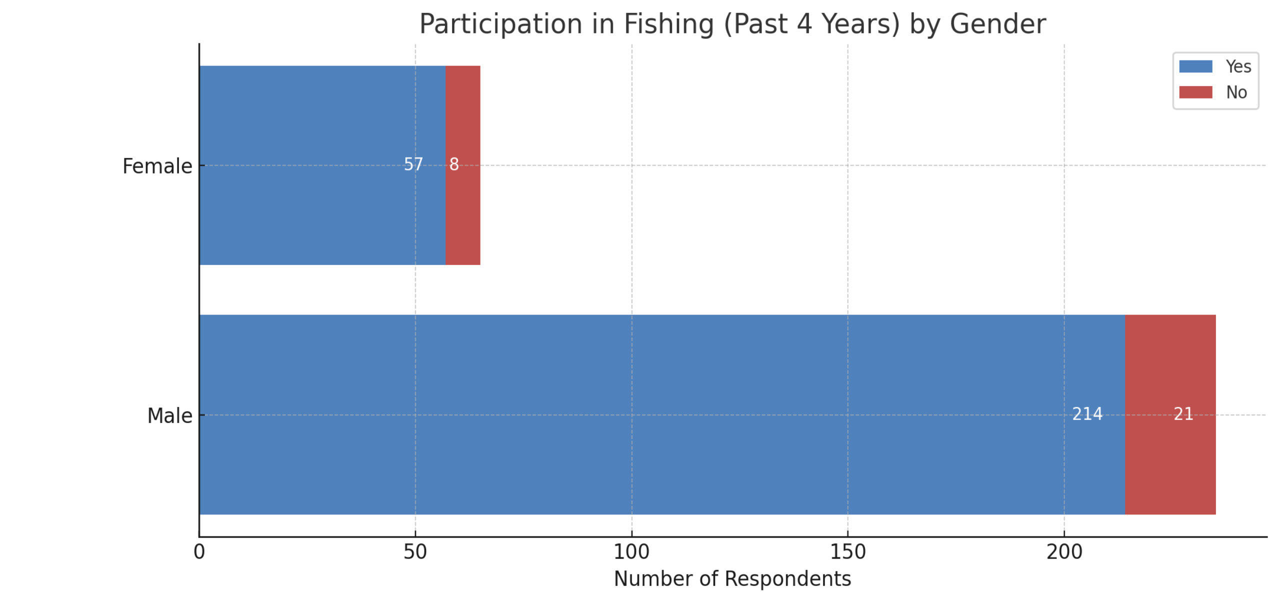



## Predictable Pattern in By Species Data

Predictable patterns emerge, such as waterfowl being more limited in times per year, with predator hunting and small game being more frequent.

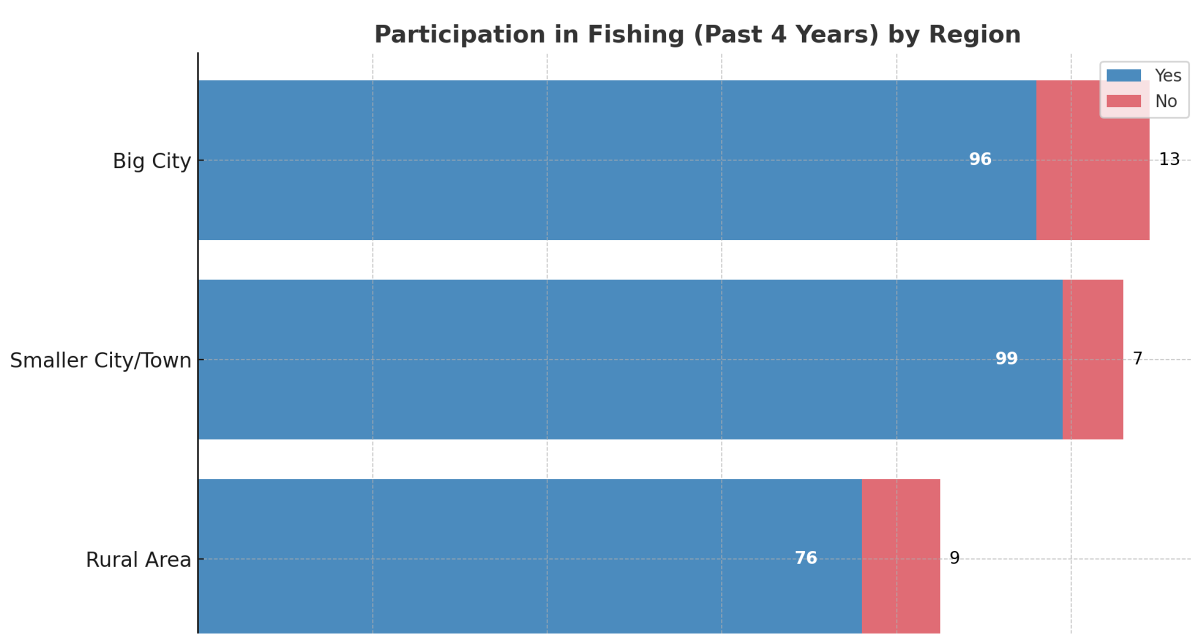
3.4a

# Angler Breakout, By Demographic




## Fishing is Heavily Male-Driven

78% of all customers who answered “yes” to fishing were male. Although 1 out of 5 customers surveyed were female, the conversion rates between both genders were about equal - 91% of males answered “yes” to fishing, with 88% of females saying the same. Females start at a much smaller base, presenting tremendous onboarding opportunities for first-time female anglers.

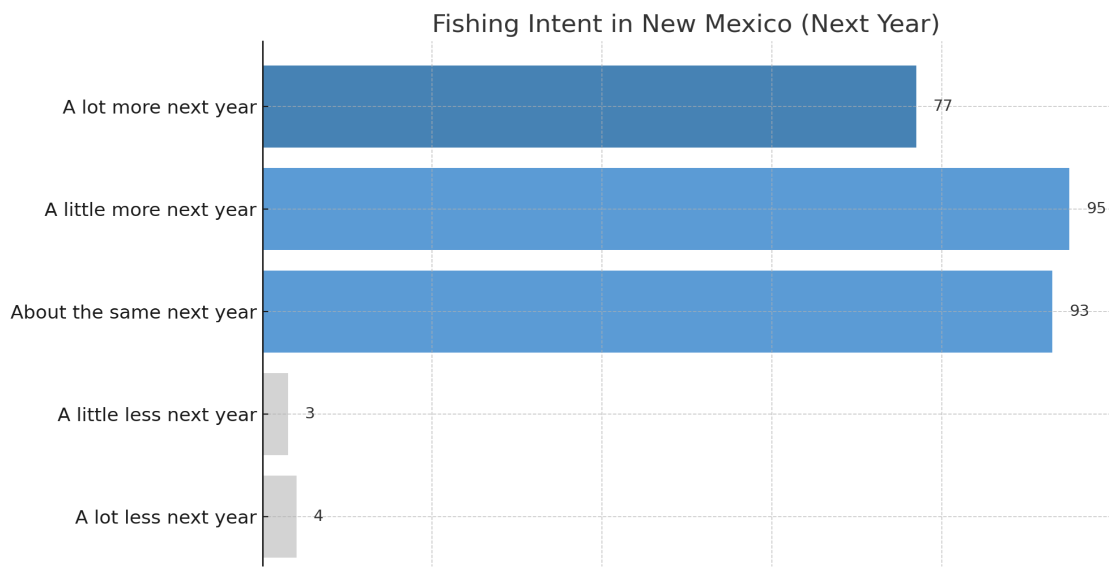



## Universal Fishing Engagement Across Geographies

Interest in fishing is not a limiting factor by location, as customers in all three core regions had a participation rate of 88%. Continuing to engage constituents with year-round fishing programming will stoke the flames on this healthy participation rate.

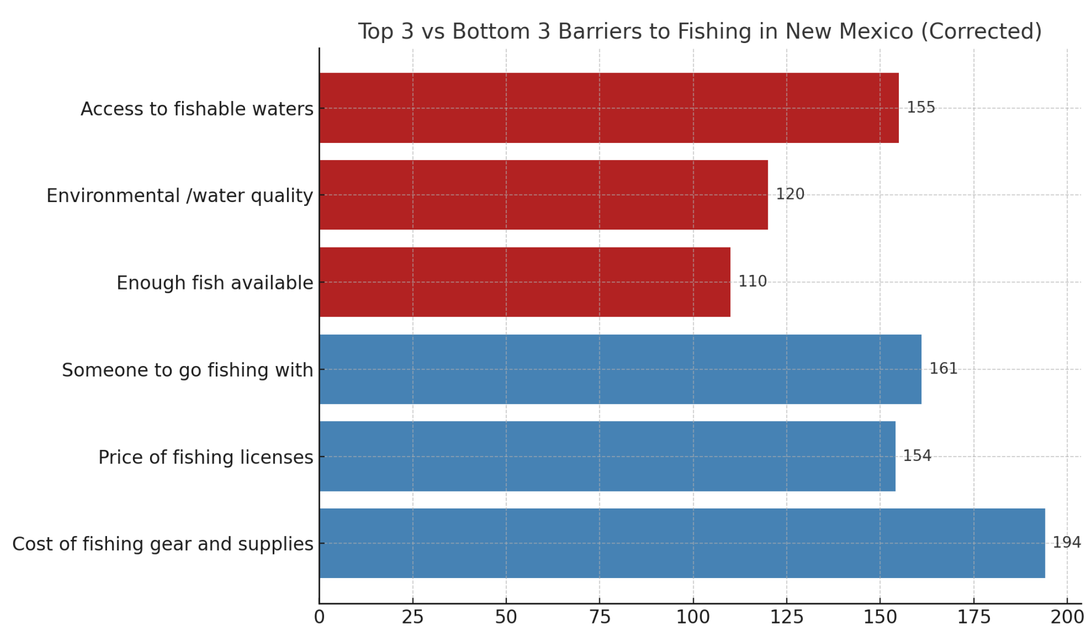
3.4b

# Angler Breakout By Participation Frequency




## Forward Momentum and High Retention for Anglers

63% of customers plan to fish more next year, with only 3% planning to fish less. This is a substantial net-growth outlook, not only stable, but accelerating. The customer base is extremely loyal to the activity. Awareness is established, and enhancing the experience's value is the next goal.

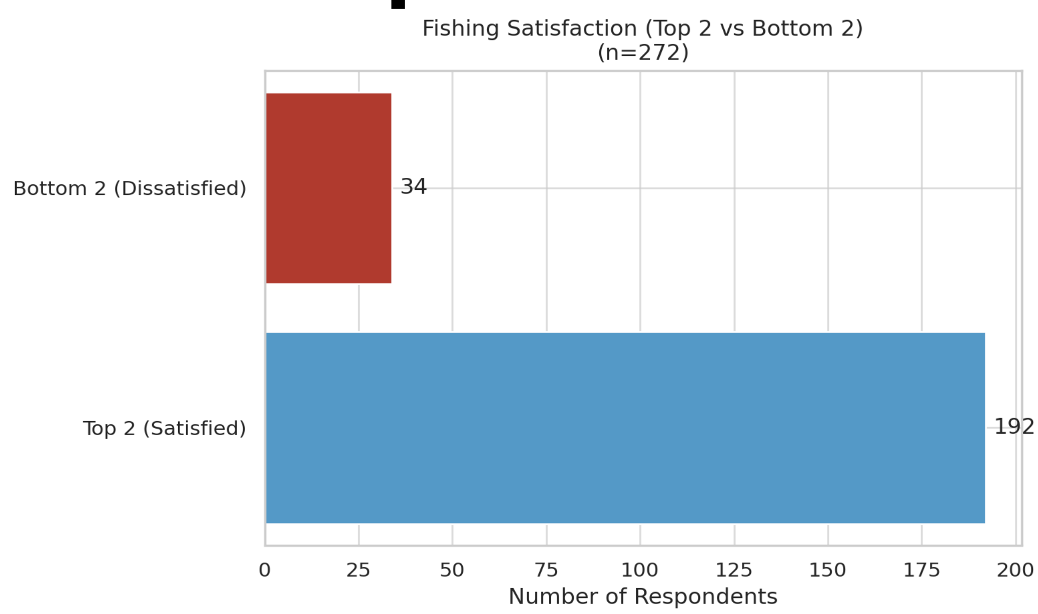



## Resource Integrity and Natural Access Matters Most

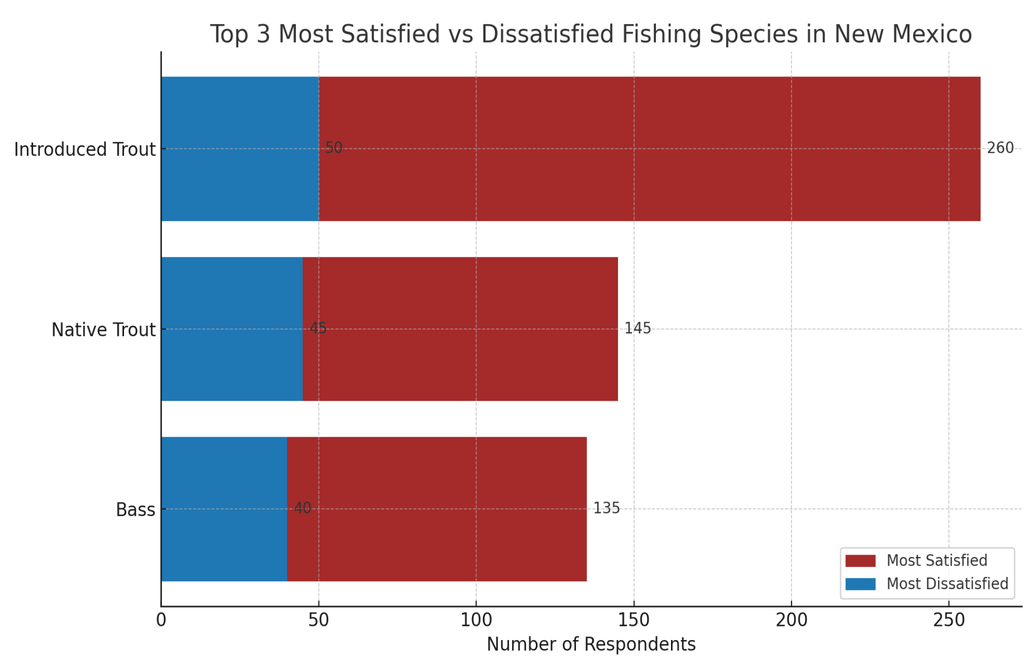
Across the board, anglers simply want well-maintained waters with plenty of fish. The cost of participation, licenses required, and social dynamics are much less of a factor.

3.4c

# Angler Breakout By Satisfaction and Species Participation



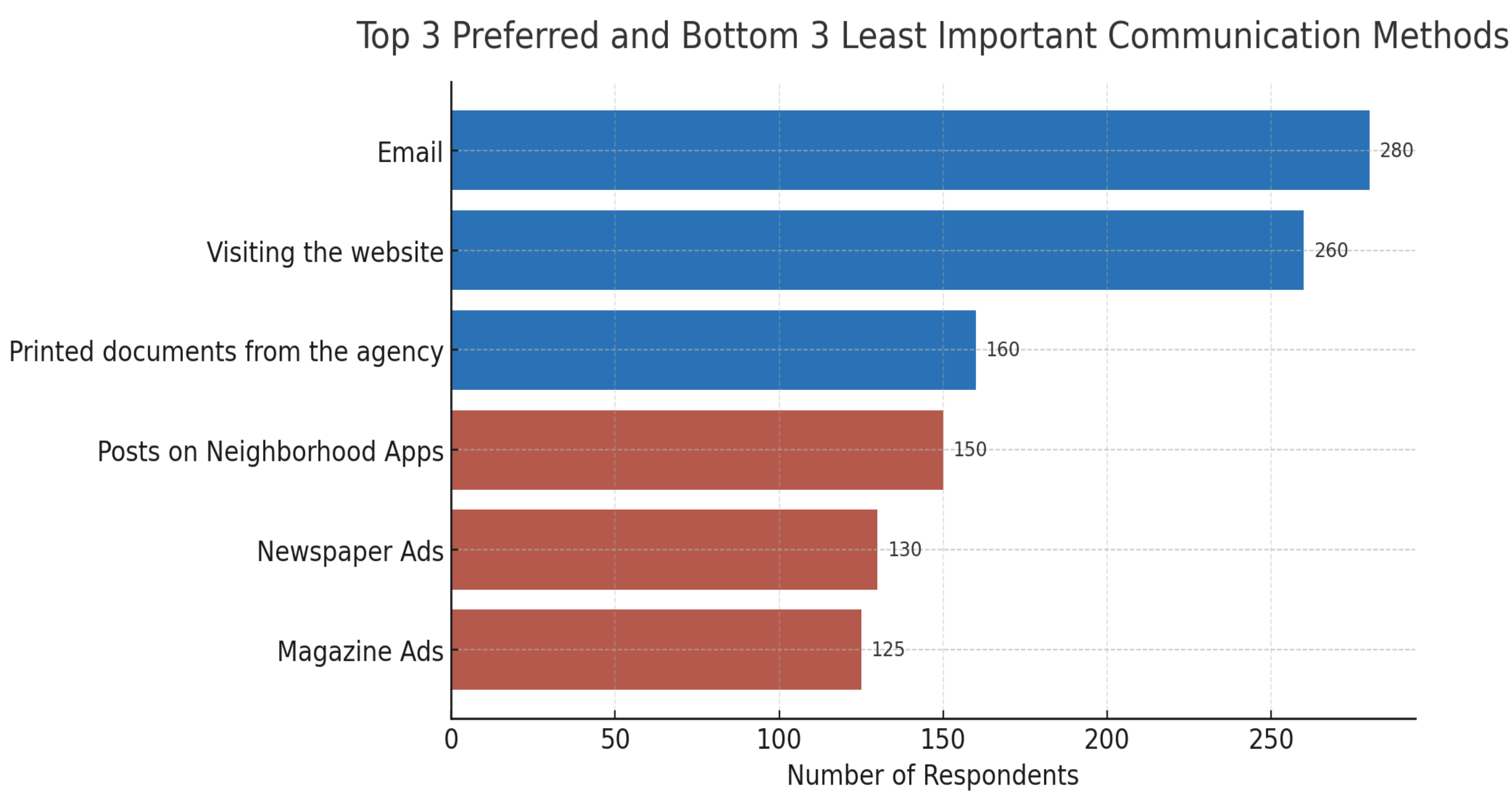

**Fishing Satisfaction is Substantially Higher than Hunting Satisfaction**
Hunting has more than 3x the dissatisfaction rate (39.8%) compared to fishing (12.5%), and a much more substantial net satisfaction margin (+58.1%) vs. hunting's (+7.9%). The data shows anglers are broadly more content with their experiences, likely due to fewer logistical or regulatory barriers




**Trout and Bass Drive Both Satisfaction and Dissatisfaction**
Introduced Trout, Native Trout, and Bass are not only correlated with the most satisfied, but also the most dissatisfied. This pertains to the frequency and amount of how often these species are fished. High usage brings high expectations, meaning investment in stocking, habitat, and access for trout and bass will yield the greatest return in satisfaction improvement.

3.5

# About Customer Communication Touchpoints




## Digital Communications Are Cornerstones

Email (280 responses) and website visits (260 responses) are the two most preferred methods of communication, over 2x more preferred than the next highest option. This confirms that digital-first outreach remains central to user engagement with the department.

## Printed Methods Still Hold Strong Value

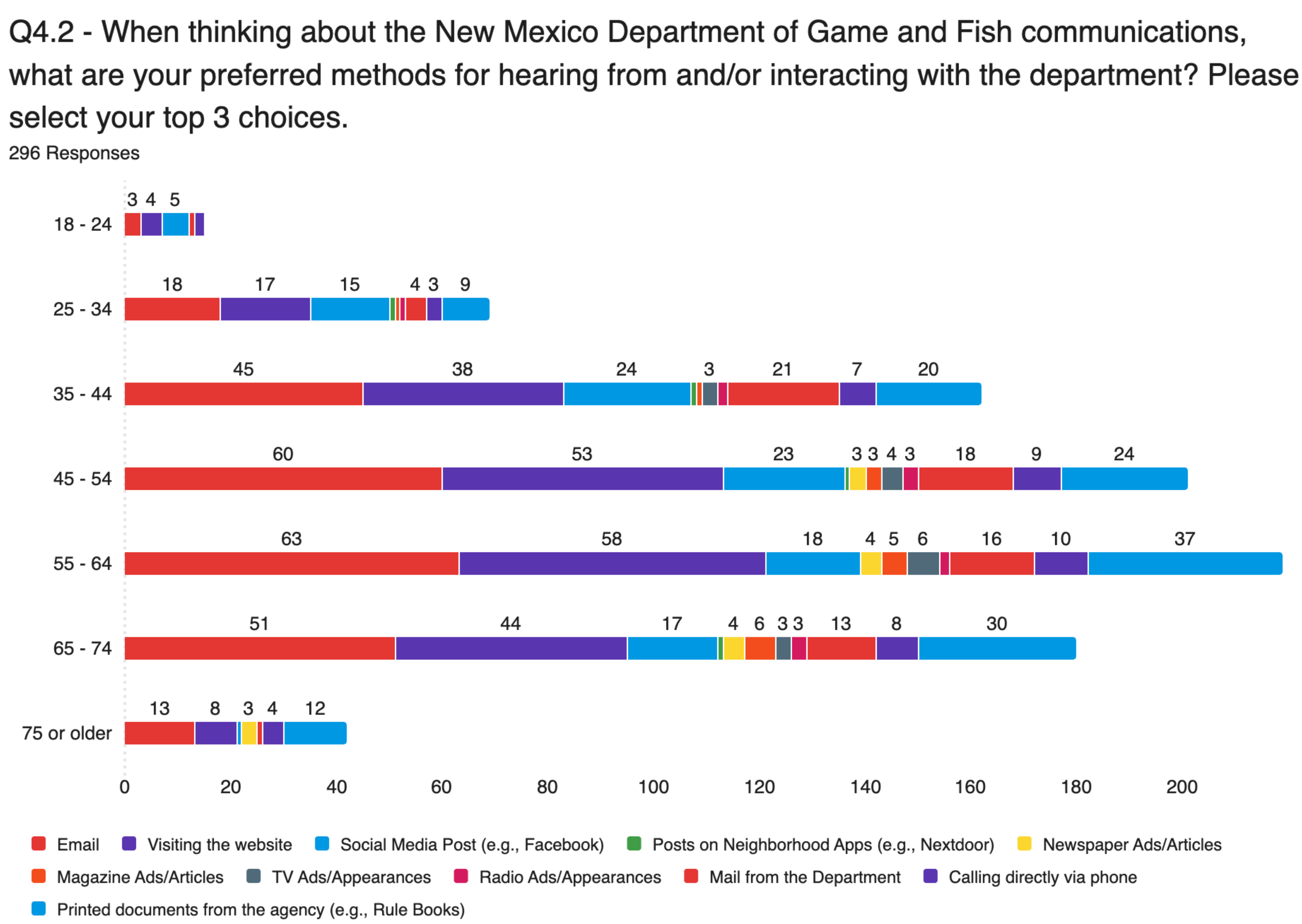
Printed documents still rank third among our customers' preferred communication channels, beating out more contemporary digital tools like social media. This suggests that tangible, official-looking communications still resonate with a large audience of hunters and fishers.

## Indirect Channels are Inopportune

Neighborhood apps (150), newspapers (130), and magazines (125) top the list of least essential methods. Users are deprioritizing these in favor of more direct, agency-controlled channels. Source credibility (agency vs. third-party media) may be more important than the format.

3.5b

# Customer Communication Touchpoint Preferences by Age




## Email is Favored over Social Media by Every Age Group

While one age bracket has the highest preference for social media content (25-44) - email is favored more.

## Printed Docs Still Favored - Even By Younger Customers

The value of printed materials, like RIBs, is high in veery age bracket as well.

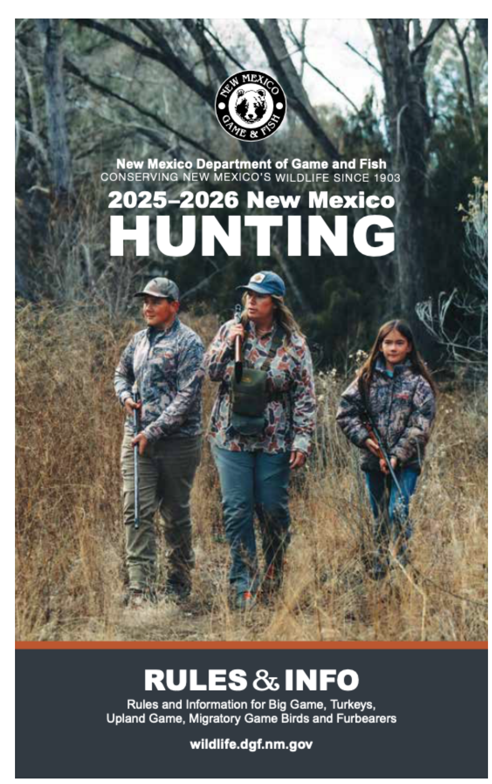
3.5c

# Customer Communication Touchpoint Preferences, by Activity

| Channel | Hunters (%) | Fishers (%) |
|---|---|---|
| **Email** | 30.4 | 29.5 |
| **Website** | 26.7 | 25.8 |
| **Printed Docs** | 15.8 | 15.5 |
| **Social Media** | 12.4 | 11.8 |
| **Mail from Dept** | 8.8 | 8.1 |
| **Phone Call** | 4.8 | 5.2 |
| **Neighborhood Apps** | 1.0 | 1.9 |

## No Statistically Significant Difference Between Hunters and Fishers in Comms Channel Preferences

Nothing is above our ~4% margin of error and these results are expected based on other data.

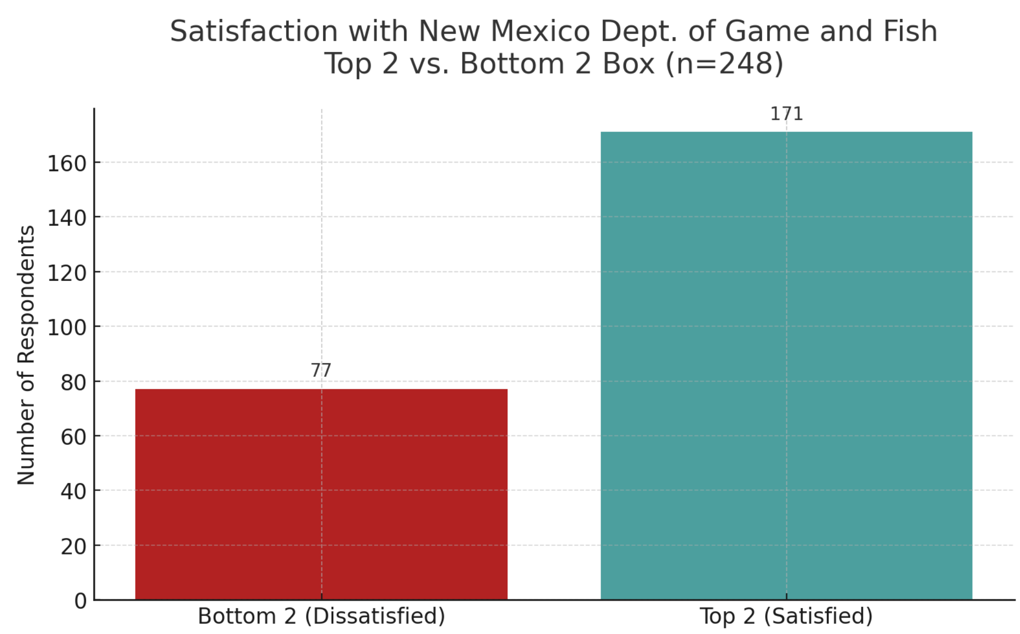



## Email and Website are Preferred almost 3 to 1 over Social Media.

As we optimize Information and Education division activity, we should try as much as possible to match our effort and budget allocation accordingly.

3.6a

# About Customer Department Satisfaction




## Customer Satisfaction is Strong

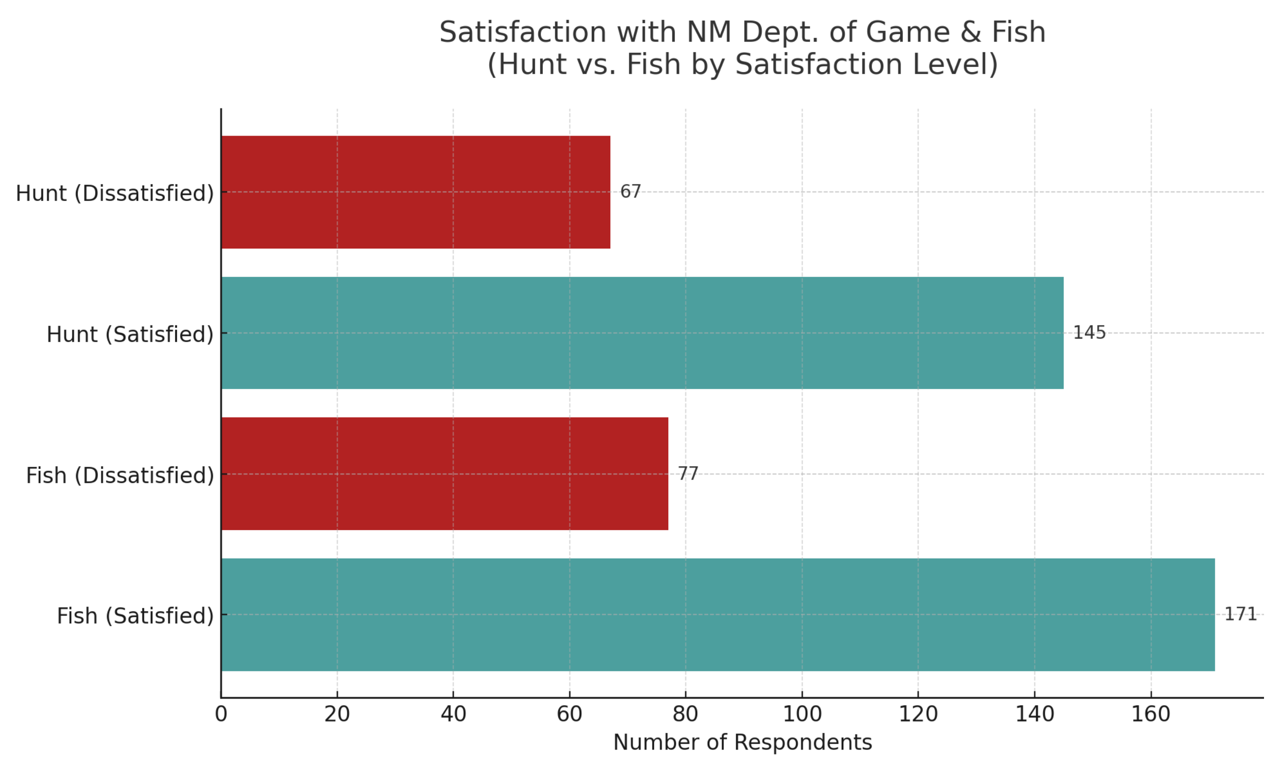
Overall, the department is perceived positively by customers. This is a healthy ratio that we'll look to see hold in future waves

## Higher Satisfaction Compared to Non-Customers

Customers hold a 2.2:1 satisfaction rate with the department, compared to non-customers who are split about 1:1 satisfied vs. dissatisfied.

3.6b

# Brand Satisfaction for Hunters and Fishers




## Hunters Are Generally Content with the Agency

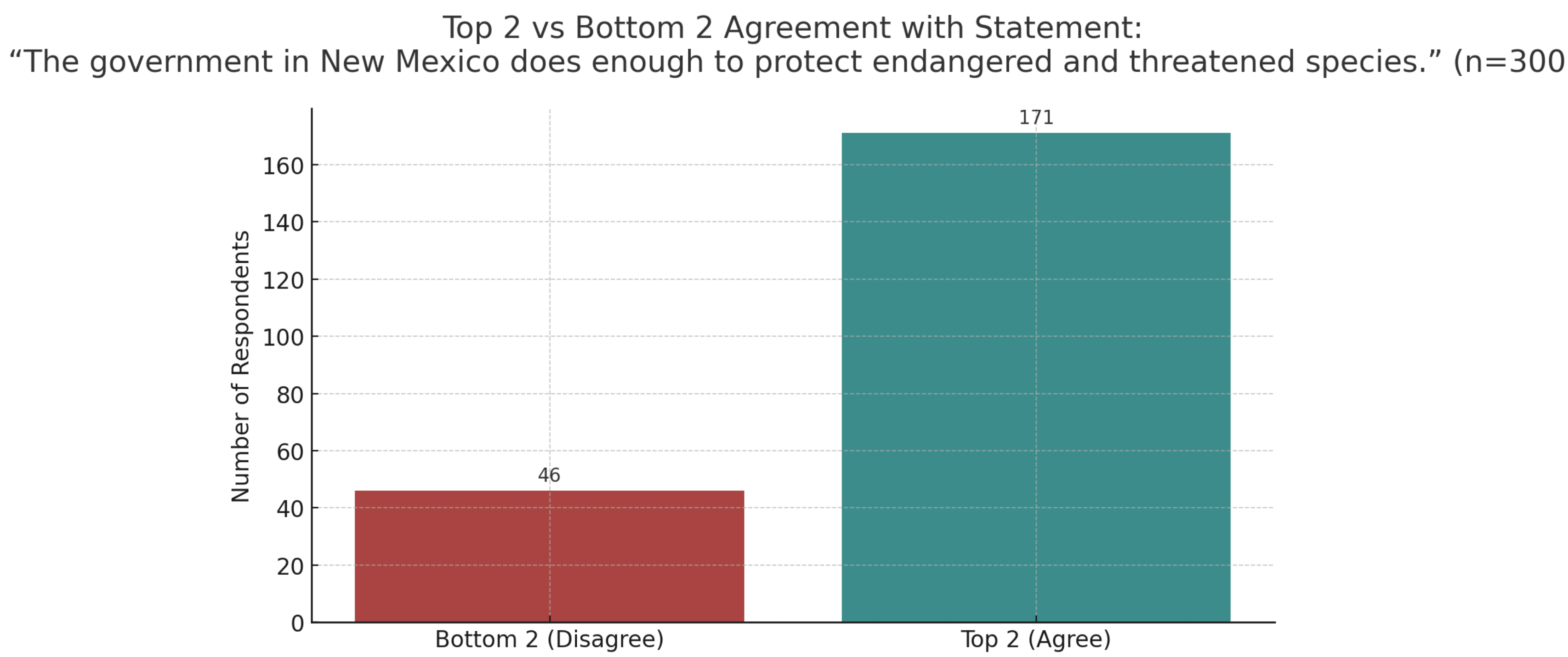
When hunters are asked about the agency overall vs. the hunting draw specifically, satisfaction increases by 70%. Although draw frustrations are large, they are an isolated incident compared to the general department perception.

## Brand Trust is Strong

7 out of 10 respondents reported some satisfaction, reinforcing that the agency enjoys a strong foundation of public trust. With high trust comes the ability to enforce solutions based on built-in audience goodwill.

3.6c

# Customer and Department Mission Satisfaction

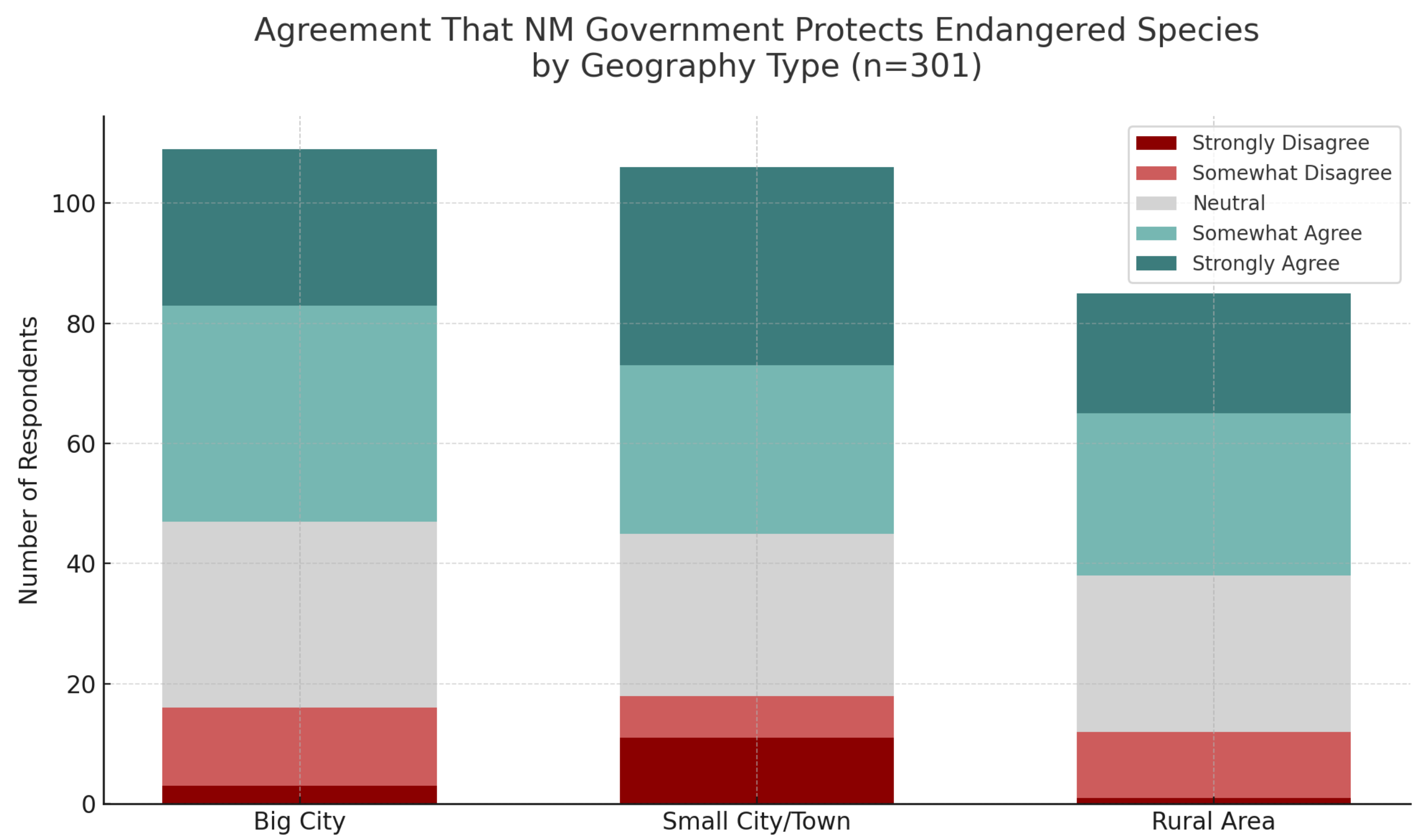



**The majority of respondents agree that the state government does enough**

Among our surveyed customers, 57% strongly or somewhat agree that the government is protecting wildlife.

3.6d

# Customers and Department Mission Satisfaction, by Region




## Regional Affinity is High

Whether in a big city, town, or rural area, the department has a good perception of its wildlife conservation mission.

## Regional Distribution is Even

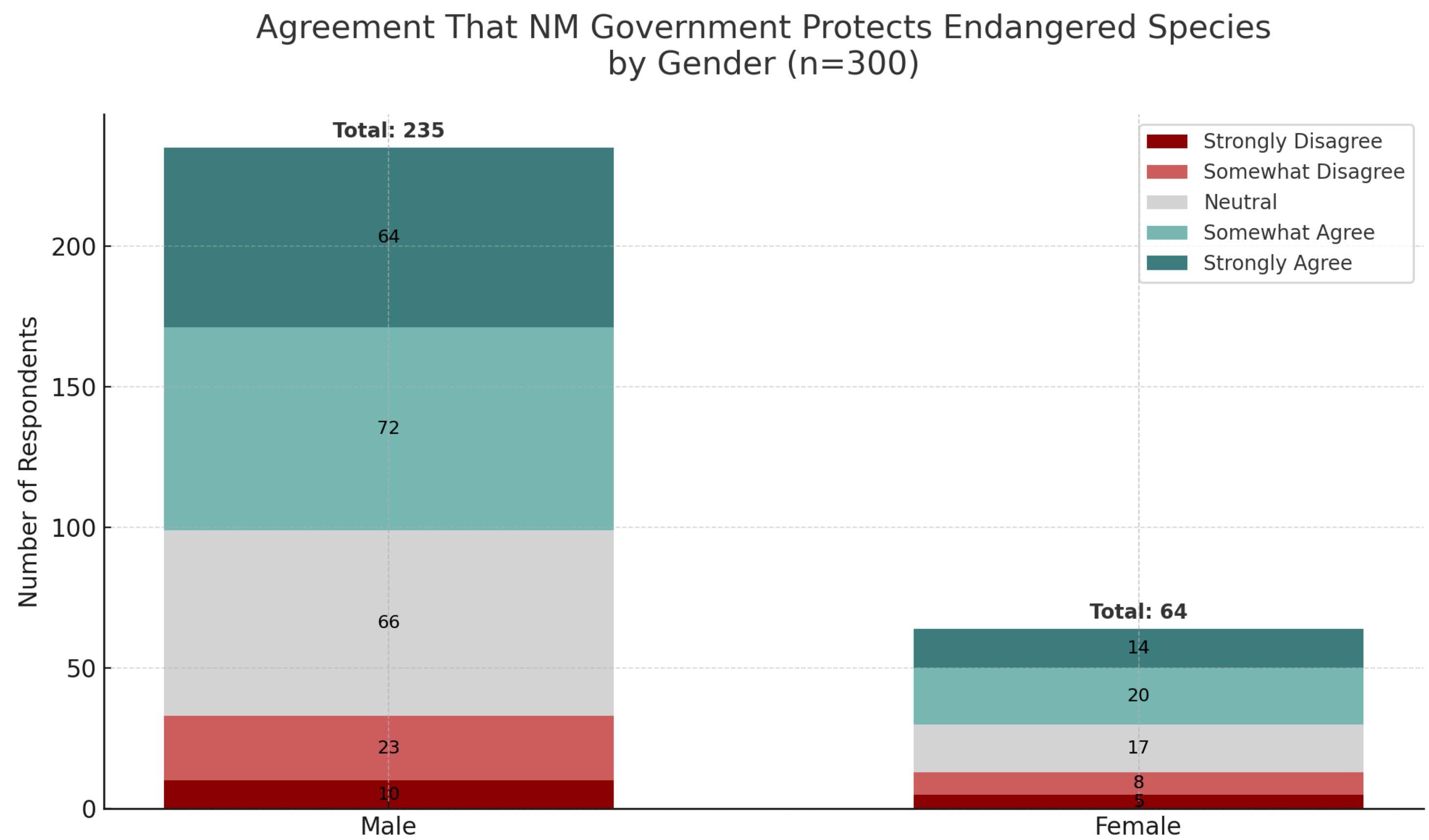
Although there are major cultural differences between New Mexico's big cities and rural areas, the perception of wildlife conservation is balanced. Our general messaging and approach are working.

## "Persuadable Middle (Again)"

Expanding upon the persuadable middle, there's an even distribution across neutral and positive sentiments, meaning there's an opportunity to convert neutral opinion holders into those with favorable opinions on government wildlife conservation efforts.

3.6e

# Customers and Department Mission Satisfaction, by Gender




## Male respondents are 4× more likely to agree than disagree

General positive sentiment with Males aligns with their higher satisfaction levels in previous charts (e.g., department satisfaction and fishing satisfaction)

## Females Slightly More Skeptical

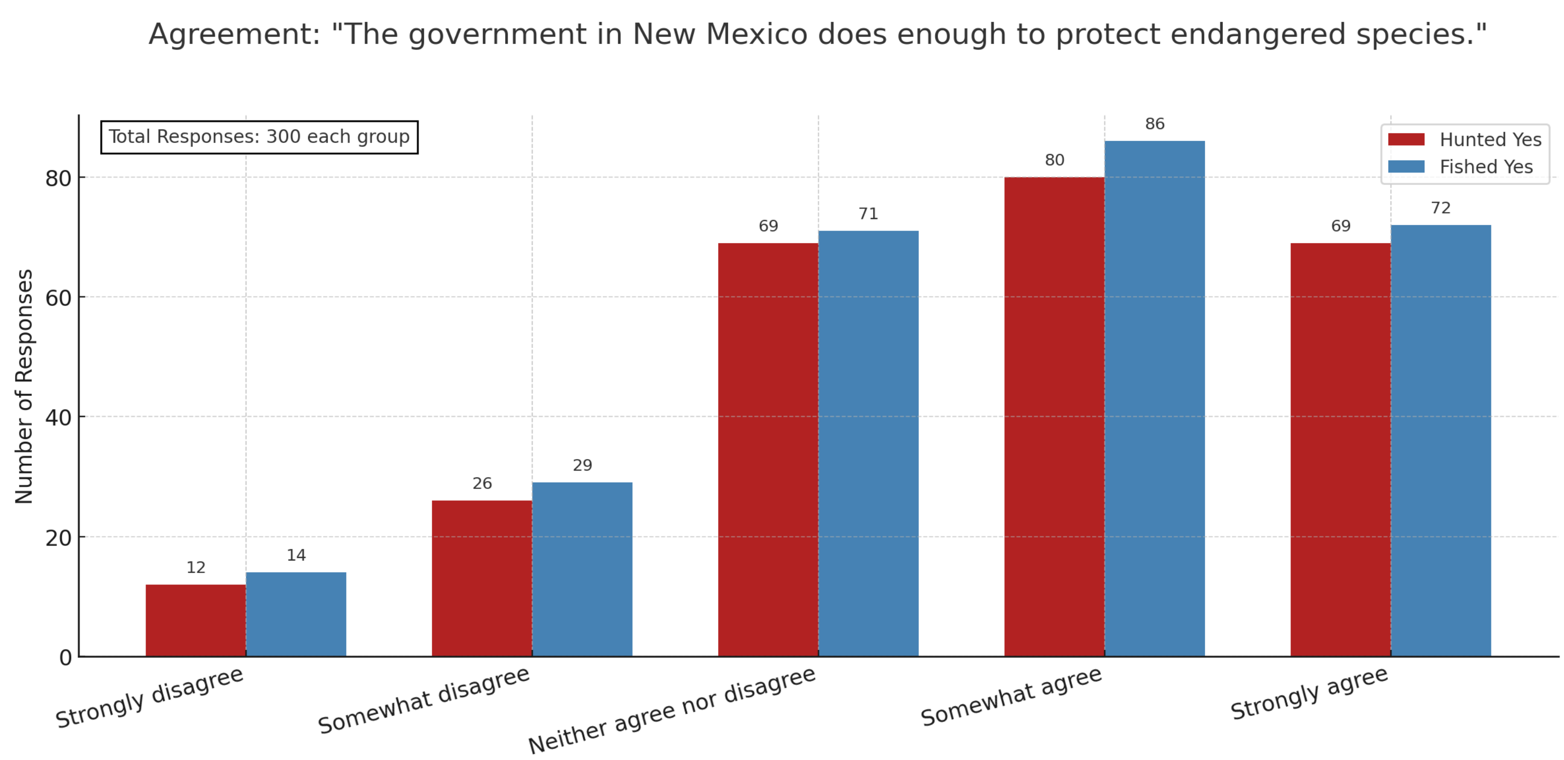
Female respondents show more moderation and uncertainty, with lower rates of strong agreement or disagreement. Neutrality plays a more defining role in female responses, suggesting opportunities to increase clarity or visibility of government programs for women.

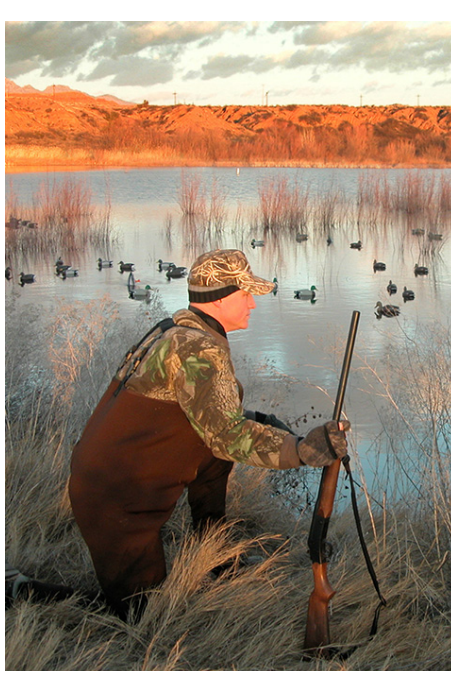
## Male Respondents Skew Towards Polarization

Males tend to show higher satisfaction and more assertive positive responses across nearly all metrics studied.

3.7a

# Customer Satisfaction with Department Mission, by Product



## Even Distribution between Hunt and Fish

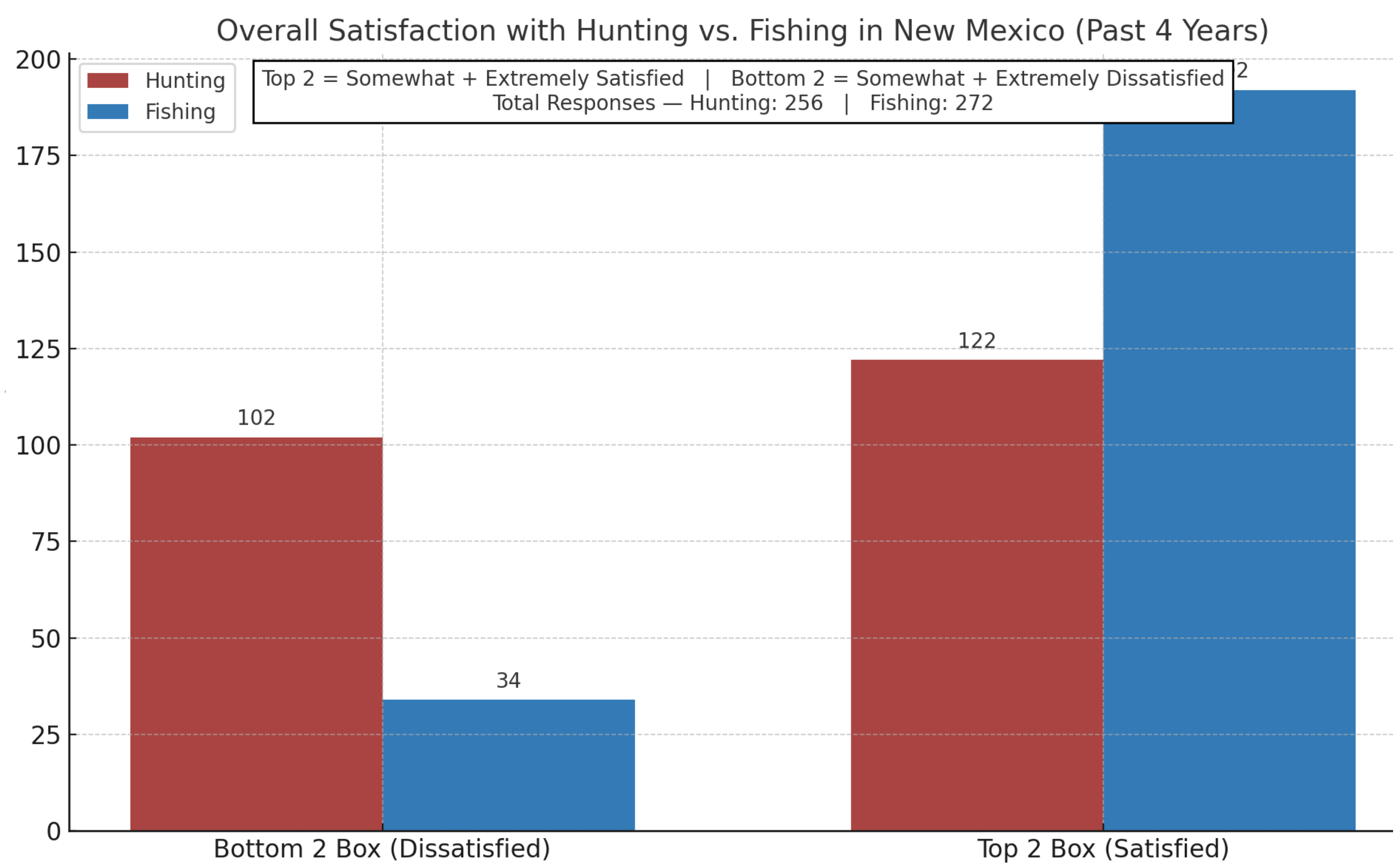
Both hunters and fishers show over 50% agreement (somewhat or strongly) that the government is doing enough.

## Neutrality Toward Government Species Protection is Consistent

One-quarter of participants in both groups are undecided, representing a critical segment that could be influenced through targeted education, transparent policy communication, or more visible conservation outcomes.

3.7b

# New Mexico Hunt and Fish Product Satisfaction




## New Mexico Fishers are Very Satisfied

A striking 70.6% of fishers are satisfied, with 26.5% strongly so. Comparing that with low dissatisfaction (12.5% combined) means spotlighting fishing opportunities within the state can meet customers on an agreeable activity.

## Hunting Dissatisfaction Is Three Times Higher

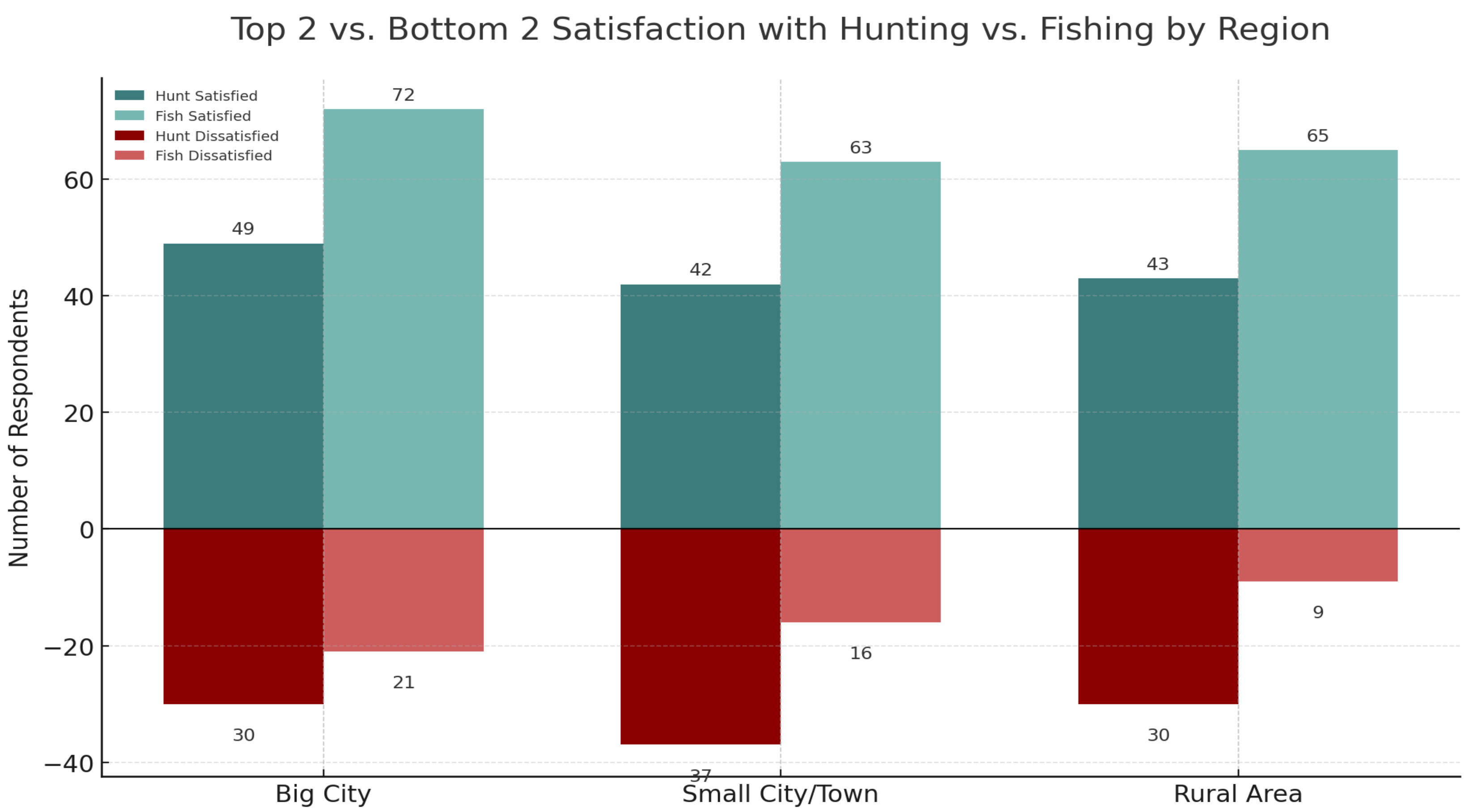
One hundred two respondents (40%) fall into the Bottom 2 Box for hunting, compared to only 13% for fishers. This significant disparity suggests systemic issues or unmet expectations are more prevalent in the hunting experience.

## Awareness Doesn't Equate to Satisfaction

Even though hunting had slightly fewer total respondents, its negative sentiment is disproportionately higher. The challenge isn't attracting participation but improving the experience post-participation.

3.7c

# Regional Breakdown of Product Satisfaction




## Across Regions, Fishers are More Satisfied than Hunters

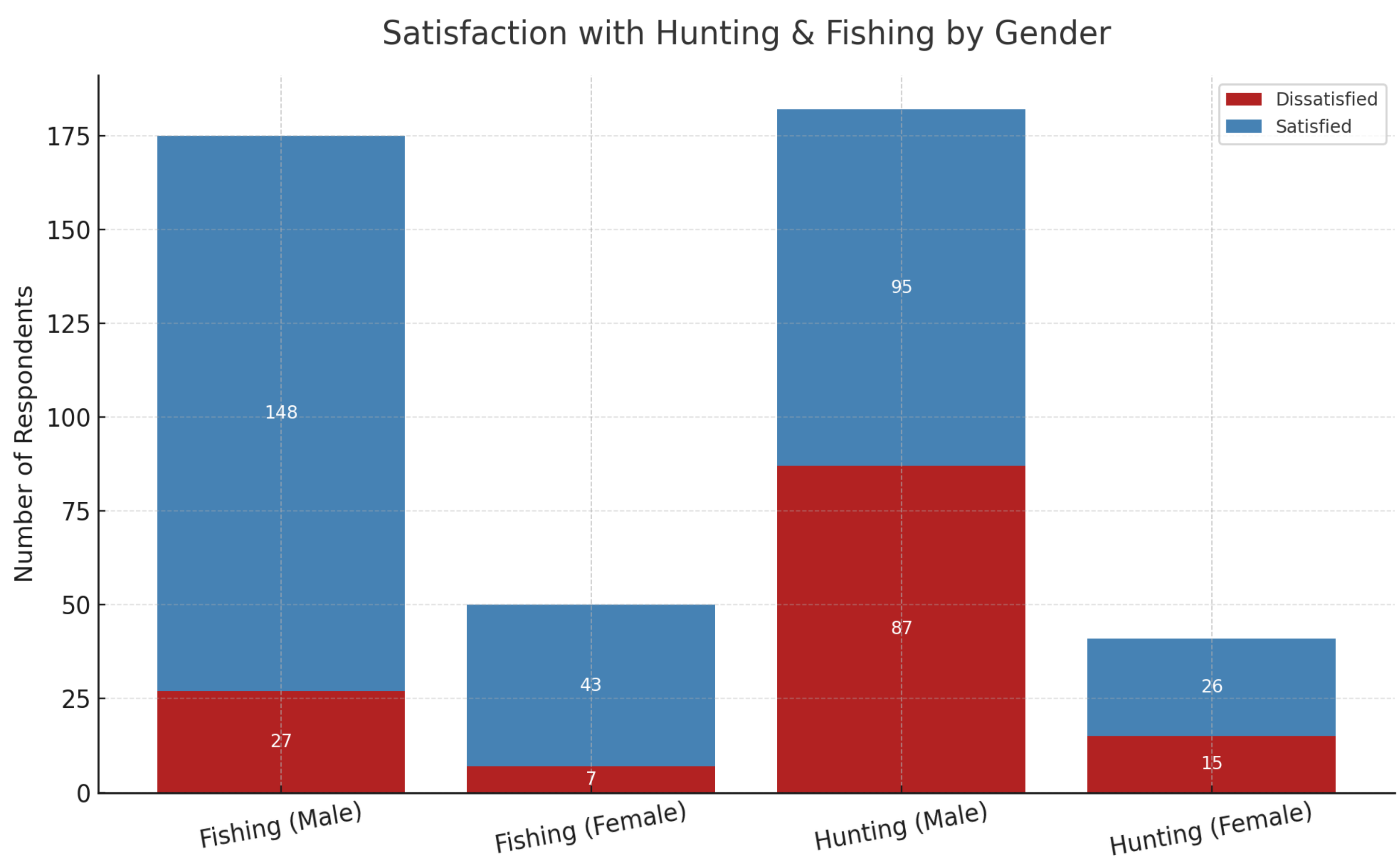
Big city fishers are the most satisfied cohort overall (76%), with the lowest dissatisfaction (9%). In smaller towns, fishers still outperform hunters in satisfaction by 18 percentage points. Our opportunity is the continued tracking of high affinity amongst fishers and decreasing hunter dissatisfaction.

## Smaller Cities & Towns are Most Polarized

Small cities and towns are the only region with high hunter dissatisfaction. Ensuring this region feels properly served could contribute to improved metrics around satisfaction in subsequent waves.

3.7d

# Gender Breakdown of Product Satisfaction




## Both Genders of Fishers are Highly Satisfied

Both male and female respondents report overwhelming satisfaction with fishing, with 6:1 or better satisfaction-to-dissatisfaction ratios. This matches earlier findings, which show high fishing satisfaction across regions and demographics.

## Hunting Satisfaction is Split for Males and Higher Among Females

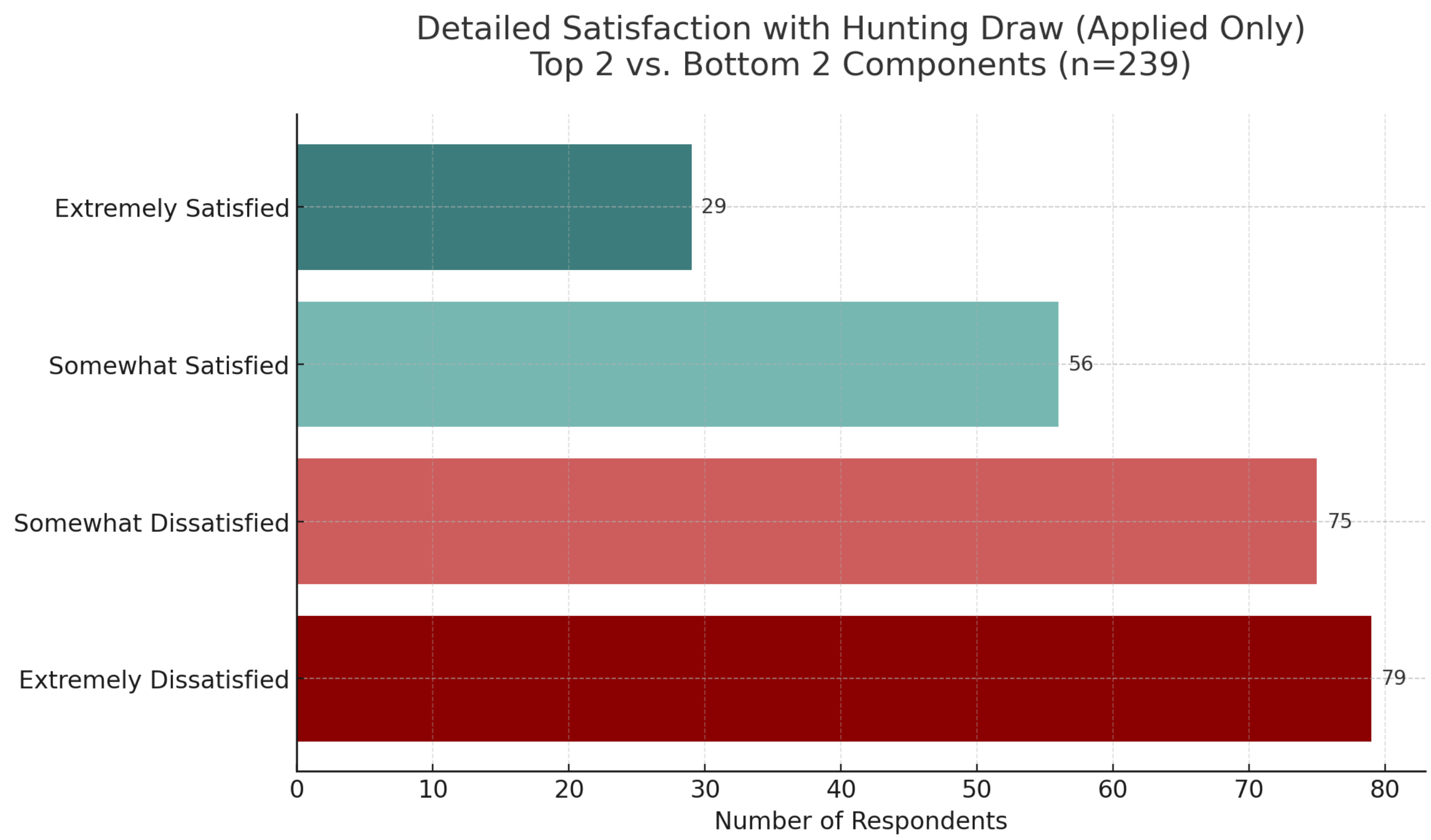
Male respondents are almost evenly split in their satisfaction with hunting, reinforcing past trends showing polarization around draw access and hunt quality, especially in small towns


**“I’ve lived in New Mexico for 45 years... I don’t understand how I can’t draw a tag while outfitters get preference.”**

*Small City/Town Male Customer 45 - 54, $50,000 - $74,999*

3.8a

# Draw Satisfaction

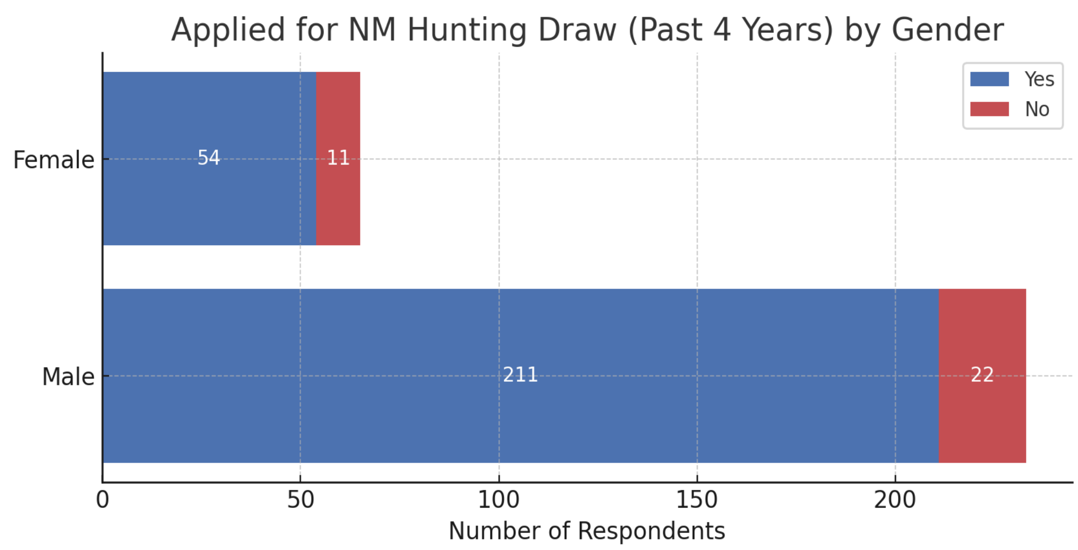



**Draw participants are almost twice as likely to be dissatisfied as satisfied.**
Customers who apply for the draw aren't happy about the process. There are frustrations across perceived fairness, transparency, or success rates.

**At 23.4% of responses, "Somewhat Satisfied" is the only category showing soft approval.**
Satisfaction exists, but it's muted and cautious, not emphatic. Tracking where (and how) the draw process is working is instrumental in improving overall sentiment about it and is worth tracking in future waves.

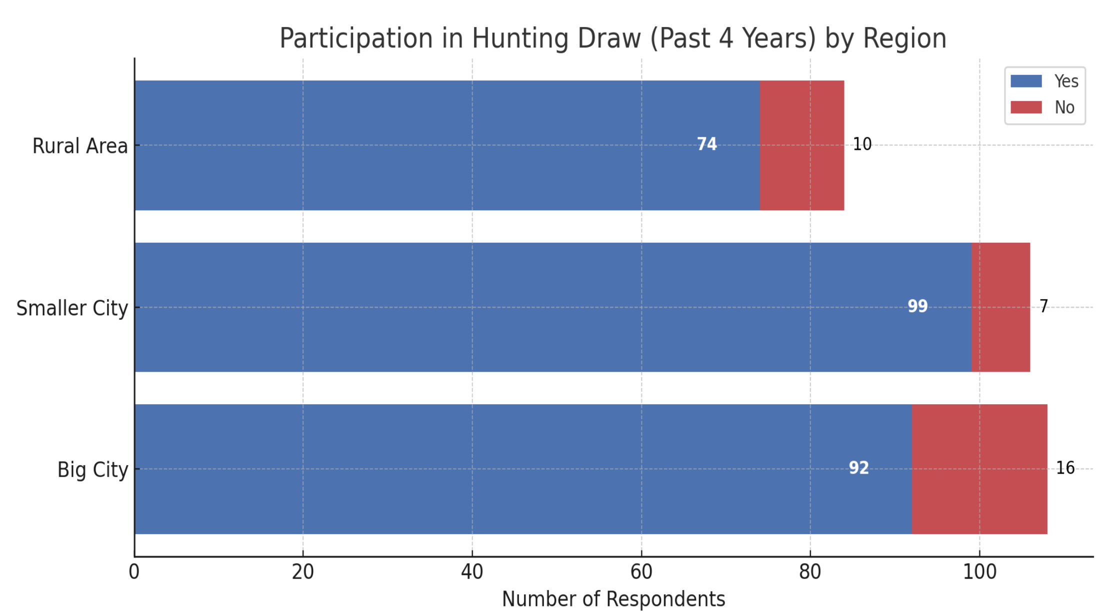
3.8b

# Draw Breakout, by Demographics




## Men are volume drivers, but women are stable once engaged

Most draw applicants are male, and they apply at a high frequency. Although women apply less frequently, the proportion of female participation is still strong, suggesting our communication efforts could be used to attract more female participants.

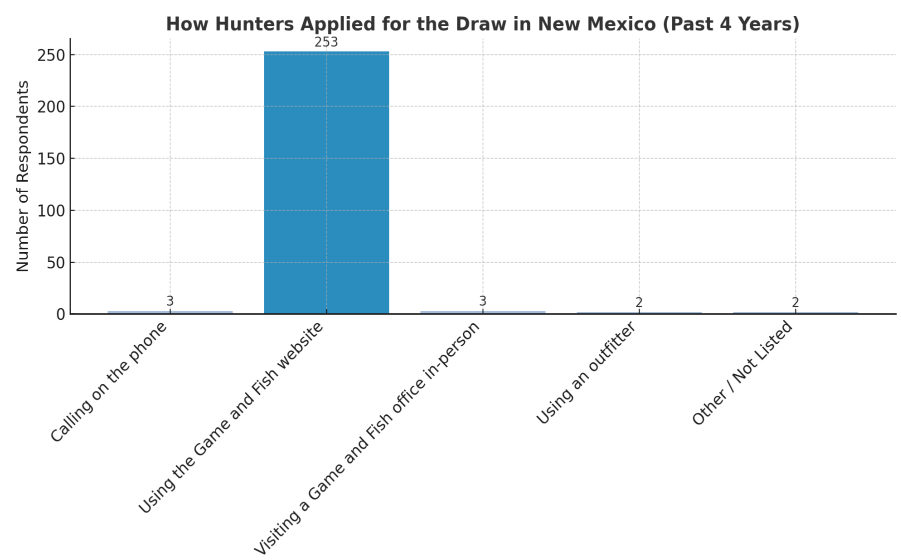



## Draw Participation Mirrors Hunting Trends

Across all regions, drawing and hunting participation are correlated. Smaller cities outperform both big cities and rural areas in nearly every metric of engagement. Although big cities have the highest raw numbers across the board, their ratio of participation is the weakest.

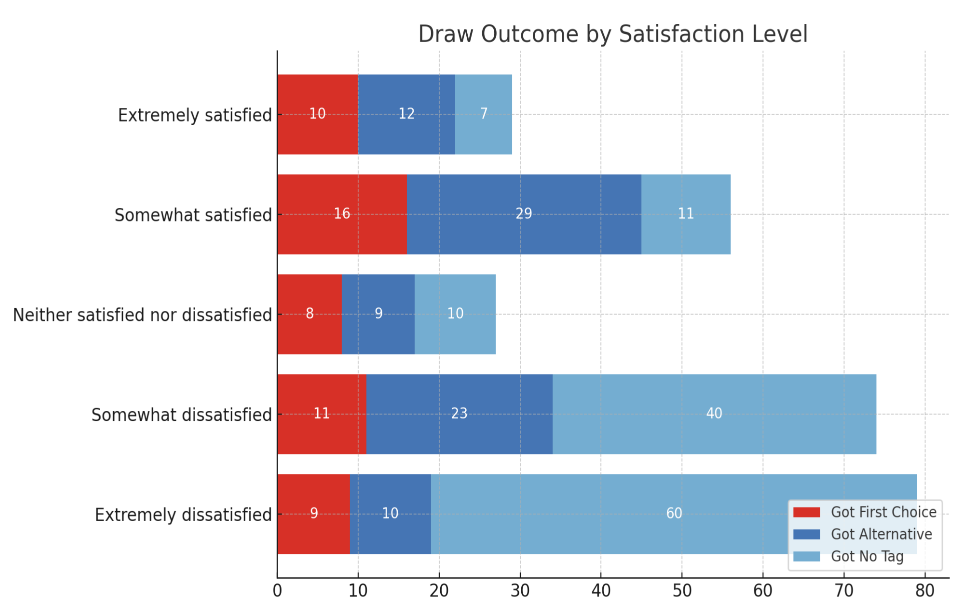
3.8c

# Draw Breakout By Channel and Participation Frequency




## Dominance of Digital Access

The overwhelming majority of draw entrants indicated the website as the default platform. The combined total for phone, in-person, and outfitter applications is just 3.8%. The department owns a centralized digital channel that is well understood and used, indicating massive strategic implications across UX/UI, mobile optimization, and server reliability.




## Customer Sentiment Depends on Draw Results

Draw failure is the single strongest predictor of dissatisfaction. Partial success mitigates dissatisfaction, as most “somewhat satisfied” respondents received an alternate tag. Alternative tags matter, and expectation management is key.

# Discussion

# Thank You.

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