

Tourism in New Hampshire

Lodging facilities, Amusement and recreational services, and Eating and drinking places all rely on tourism to varying degrees depending on the region.

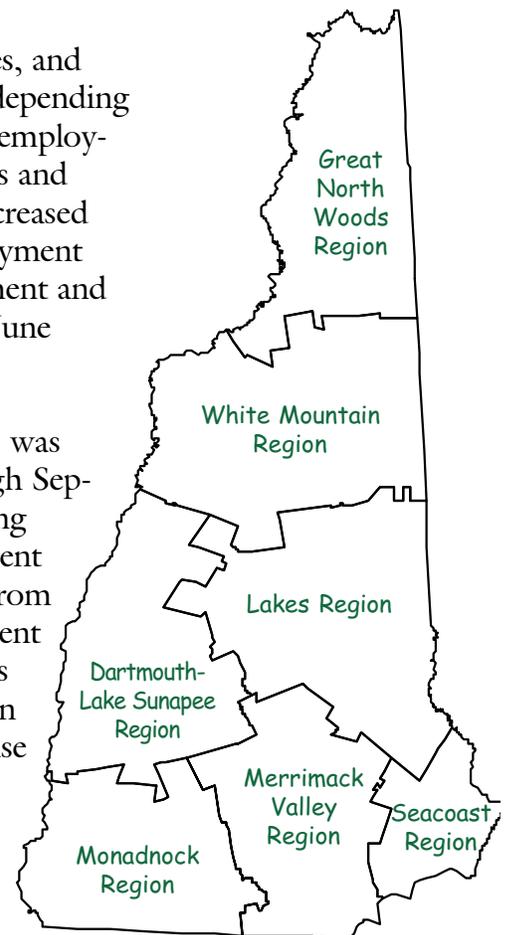
Tourism in New Hampshire is a staple of the economy for many regions of the state. Most of the regions had employment in tourism-related industries of around 7 to 11 percent of overall industry employment for the period July 1996 to July 1998. This included the Lakes, Seacoast, Merrimack Valley, Monadnock, and Dartmouth-Lake Sunapee Regions. The White Mountain Region had tourism employment of as much as 31 percent during that same period. On the other hand, the Great North Woods Region relied less on tourism-related industries with employment at 5 percent of overall employment for the region.

The state is divided into seven tourism regions, and each has a different pattern of tourism-related employment.

Businesses in Lodging facilities, Amusement and recreational services, and Eating and drinking places all relied on tourism to varying degrees depending on the region. The April to September period was one of increased employment for most of these industry groups. Most of the tourism regions and industry groupings peaked during the summer and fall, although increased employment generally started in April. The highest statewide employment levels in Eating and drinking places, Lodging facilities, and Amusement and recreation services actually occurred during the summer months of June through September.

The statewide average monthly covered employment for 1996-1998 was about 38,000 in Eating and drinking establishments for June through September compared with an average of almost 34,000 for the remaining months. The three-year (1996-1998) monthly average for employment in lodging facilities was about 11,000 jobs during the summer, up from an average of 7,700 jobs for the rest of the year. Similarly, Amusement and recreation services summer employment was almost 11,000 jobs with the other months averaging 7,900 jobs. The combined effect on summer employment alone in these industries was an average increase of more than 10,000 jobs.

The state is divided into seven tourism regions, and each has a different pattern of tourism-related employment. When you look at each region's graph, you generally see an upward curve, albeit of different sizes depending on the grouping. Nevertheless, as New Hampshire is unique from other states, so is each region unique from other regions.

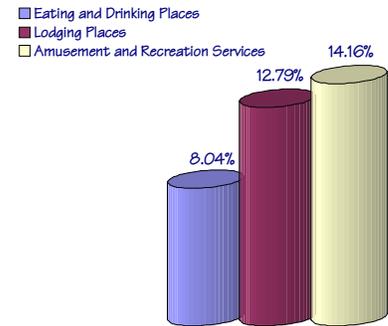


The graphs in this paper are primarily intended to show trends within a particular industry in a particular tourism region. Please note the graph scales when making comparisons with other industries and regions.

White Mountain Region - 1996, 1997, and 1998

Climbers and hikers of the Old Man as well as skiers who visit our snow-covered mountains are just a small sampling of the people who help the employment numbers in this region climb. During 1996 these tourists and others saw as many as 7,000 employees in the region. Over 5,000 of the employees were in Eating and drinking places and Lodging facilities.

**White Mountain Region
Percent Change in Employment 1996-1998**

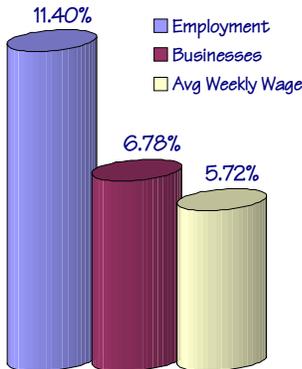


In 1998 tourists came to the region and met just about 800 more employees. Some of these new faces

This region has two peaks in tourism bringing increased seasonal employment during November-April and again from May-November.

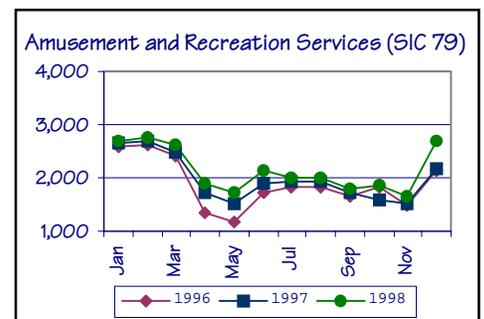
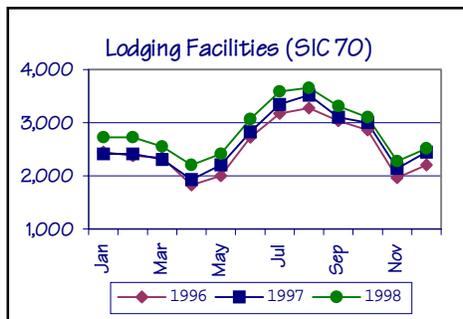
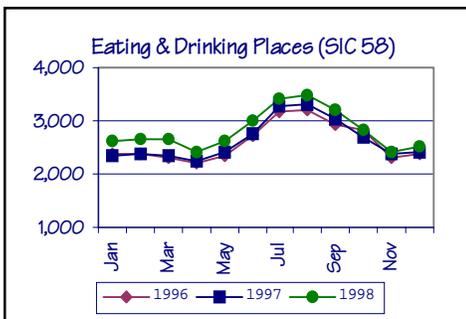
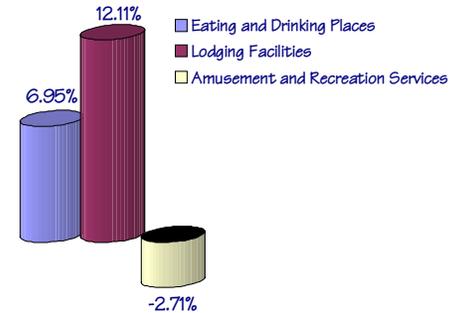
were hired on by long established businesses. Many however, were likely hired by any one of the 25 additional tourism businesses that came to the White Mountain Region between 1996 and 1998. In 1998 these new employees as well as longstanding employees enjoyed a monthly average wage of \$936. This was up six percent from their 1996 monthly wage figure.

**White Mountains Region
Percent Change 1996-1998**



This region has two peaks in tourism bringing increased seasonal employment during November-April and again from May-November. It is one of the few regions that enjoys year-round tourism activity. At the end of 1996, tourism employment within this region accounted for slightly over 30 percent of total covered employment of 23,282. At the end of 1998, tourism employment within this region accounted for just over 31 percent of total covered employment of 25,041.

**White Mountain Region
Percent Change in Avg Weekly Wage
1996-1998**



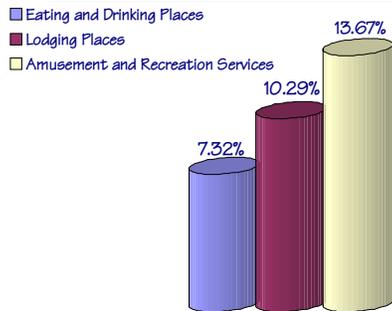
Lakes Region - 1996, 1997, and 1998

Boating enthusiasts, swimmers, water skiers, and others flock to this region each year. Some stalwarts visit as early as April, but most come during the June-September period. Employment correspondingly rises during these periods.

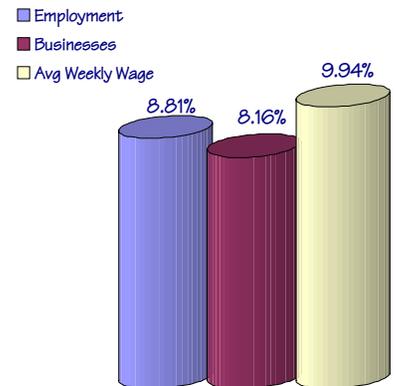
In 1996 total tourism industry employment stood at 6,683. By the end of 1998, that figure increased by almost nine percent to 7,272. Eating and drinking places accounted for more than half of this increase, adding 319 employees.

Lodging facilities and Amusement and recreation services added 147 and 123 employees, respectively, to the 1998 total. At the end of 1996, tourism employment within this region accounted for just over 11 percent of total covered employment of 59,444. At the end of 1998, tourism employment within this region accounted for close to 12 percent of total covered employment of 62,419.

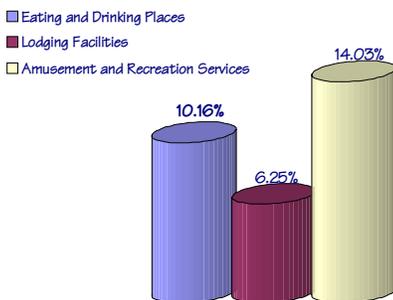
**Lakes Region
Percent Change in Employment
1996-1998**



**Lakes Region
Percent Change 1996-1998**

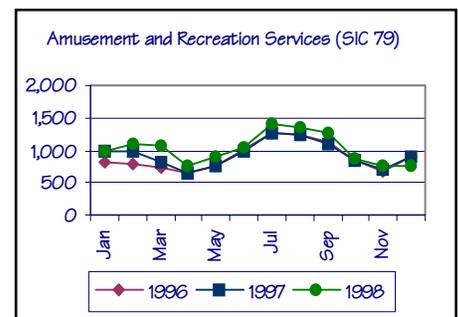
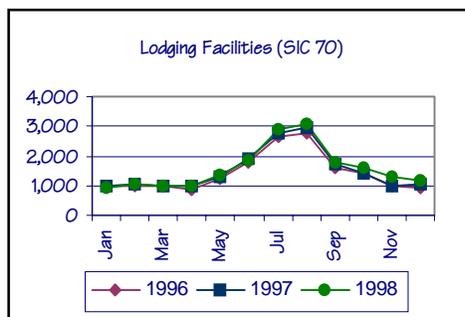
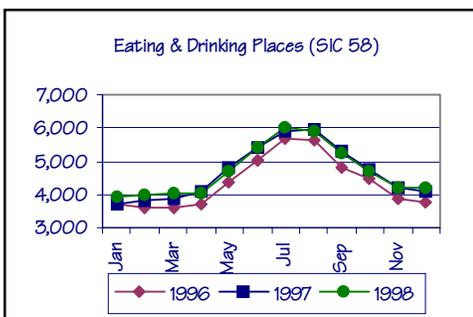


**Lakes Region
Percent Change in Avg Weekly Wage
1996-1998**



Some stalwarts visit as early as April, but most come during the June-September period.

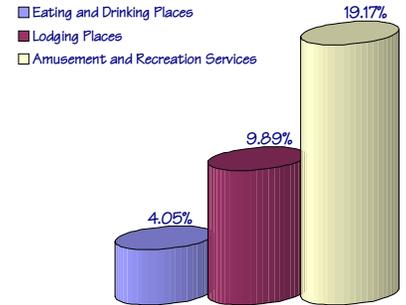
Employees working in the tourism industry generally saw an increase in their weekly wage of approximately 10 percent. Those in Amusement and recreation services saw an increase of over 14 percent in 1998 average weekly wages over 1996.



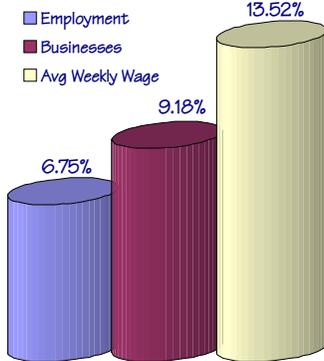
Seacoast Region - 1996, 1997, and 1998

Tourists visiting the seacoast area of New Hampshire have a treat waiting for them. Many cities, small villages, and towns have enjoyed a renaissance of their downtowns. One notable example is Portsmouth which offers many attractions such as small shops, eateries, and scenic walking trails, to name a few. The April-October period remains the most active period with tourism, but that is all that stayed the same from 1996-1998. In 1996 tourism employment was a sizable 9,870. By the end of 1998, it was 10,536.

Seacoast Region
Percent Change in Employment
1996-1998



Seacoast Region
Percent Change 1996-1998



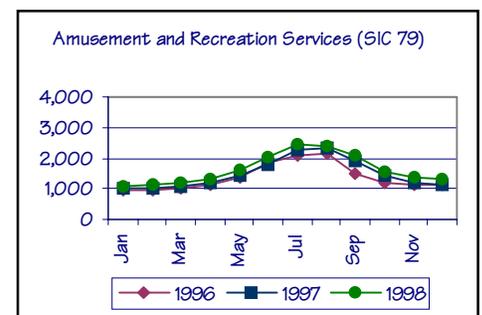
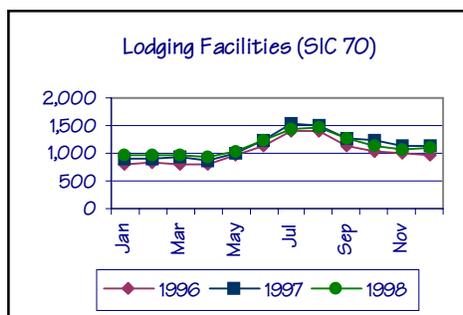
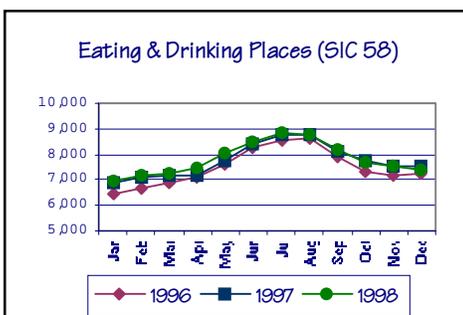
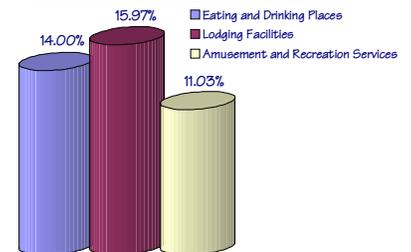
Employment for Eating and drinking places rose by just over 300 to a 1998 level of 7,785. Lodging facilities employment increased from 1,021 in 1996 to 1,122 in 1998. Amusement and recreation services employment rose by 262 employees.

At the end of 1996, tourism employment within this region accounted for just under 10.5 percent of total covered employment of 94,177. By the end of 1998, tourism employment within this region was just over 10.5 percent of total covered employment of 99,661.

Wages within the seacoast tourism industry rose almost 14 percent during the 1996-1998 period.

The April-October period remains the most active period with tourism, but that is all that stayed the same from 1996-1998.

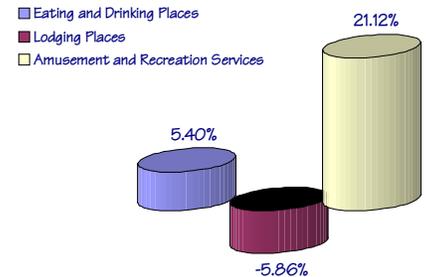
Seacoast Region
Percent Change in Avg Weekly Wage
1996-1998



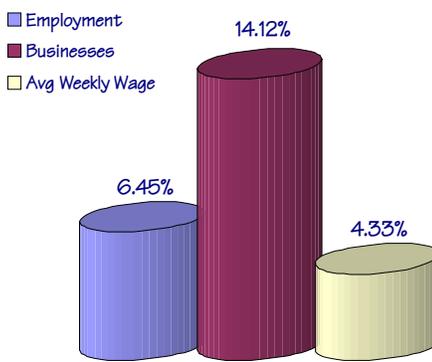
Merrimack Valley Region - 1996, 1997, and 1998

Imagine the shape of the first large incline on a roller coaster and you have a fairly good mental image of what the Amusement and recreation services employment figures looked like each year. During 1998 January-March was fairly level. March was when the climb began and continued up to a July and August employment of around 3,700. This amounted to an increase in Amusement and recreation services employment of over 21 percent from 1996 to 1998.

Merrimack Valley Region
Percent Change in Employment
1996-1998



Merrimack Valley Region
Percent Change 1996-1998



Sometime between the end of August and early September, a gradual decline begins, then during the September to November period you get a little more wind in the face as the decline steepens. By December, employment has basically leveled out once again.

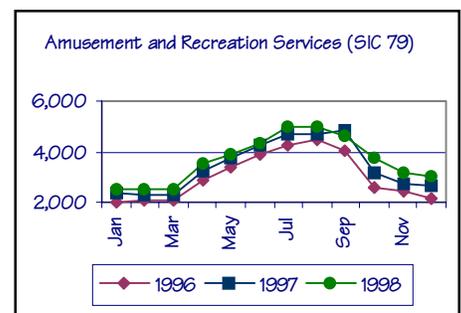
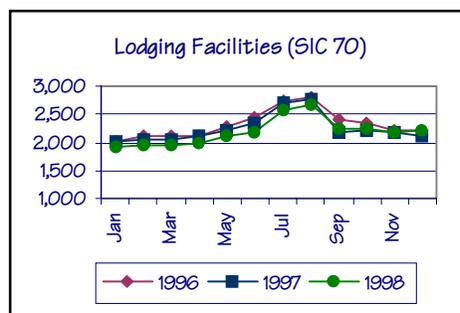
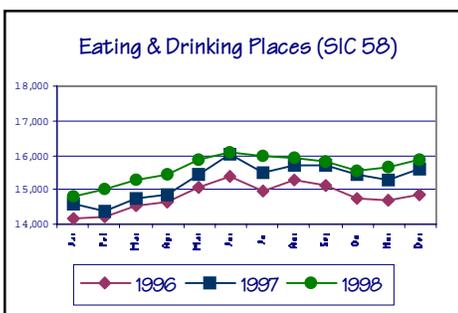
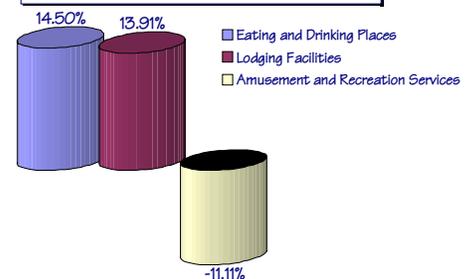
The entire tourism industry saw an increase of about 6.5 percent from 1996-1998.

Eating and drinking places rose by just shy of 800 from 1996 to 1998, and Lodging facilities showed a nearly six percent decline from 1996 employment of 2,322.

The entire tourism industry saw an increase of about 6.5 percent from 1996-1998. Tourism employment within this region at the end of 1996 accounted for just over eight percent of total covered employment of 250,621. At the end of 1998, it was still at just over eight percent of total covered employment of 266,399.

Average weekly wage for the 1996-1998 period rose by 4.3 percent to a figure of \$265.

Merrimack Valley Region
Percent Change in Avg Weekly Wage
1996-1998



Monadnock Region - 1996, 1997, and 1998

Monadnock Region
Percent Change in Employment
1996-1998



Tourism employment stood at 4,255 at the end of 1996 and 4,293 at the end of 1998. The overall increase from 1996-1998 in tourism employment for this region was under one percent, largely due to a decrease of employment within Amusement and recreation services of just under 100. Eating and drinking places and Lodging facilities had increases of nearly four percent and just over six percent, respectively, for a total employment increase between these two industries of 137.

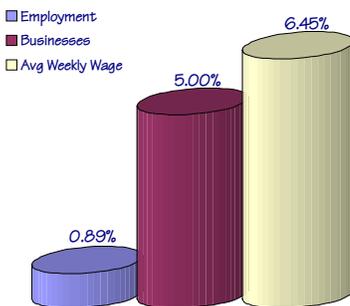
At the end of 1996 and again at the end of 1998, tourism employment within this region accounted for just about 8.5 percent of total covered employment. Total covered employment was 49,161 in 1996 and 50,694 in 1998.

When looking at the change in employment during the summer months, the 1996-1998 average in August for Lodging facilities is double that of average employment during April.

This brought the average three-year high to approximately 859 employees from a low of 429. During 1998, the change from April to August was 115 percent. Eating and drinking places average summer employment increased by seven percent over

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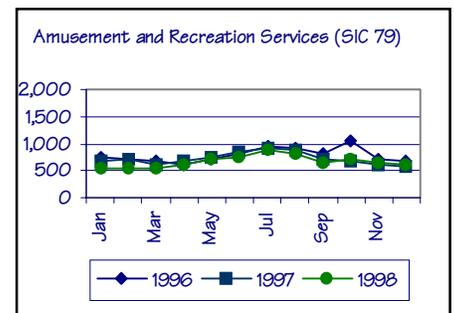
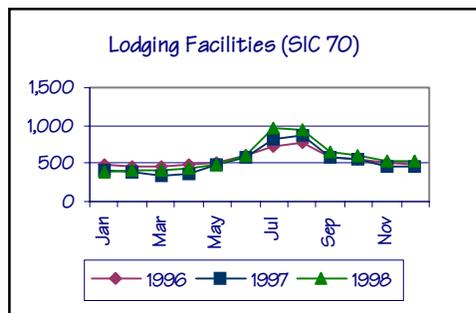
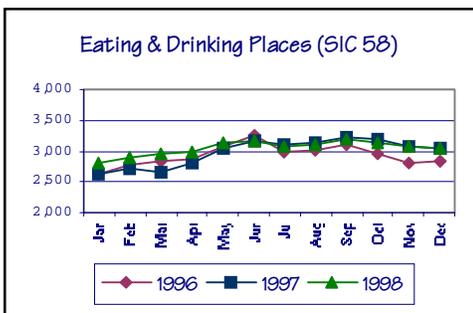
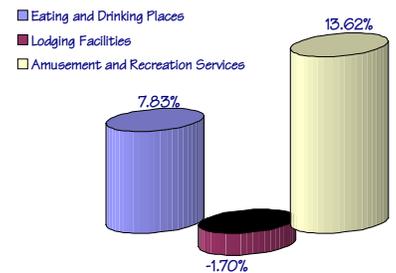
Monadnock Region
Percent Change 1996-1998



April's average employment, while Amusement and recreation services average August employment increased to 863 employees, up from April's average of 627.

The average weekly wage at the end of 1998 was approximately \$226 for the tourism-related industries in general. The average weekly wage for Eating and drinking places was \$179, and for Amusement and recreation services it was \$267.

Monadnock Region
Percent Change in Avg Weekly Wage
1996-1998



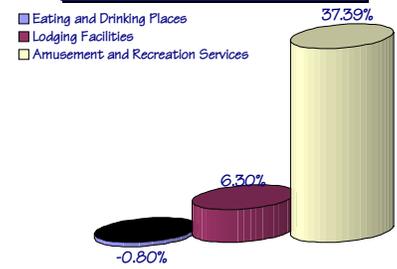
Dartmouth-Lake Sunapee Region - 1996, 1997, and 1998

The 1998 average weekly wage for this region rose the most of all New Hampshire tourism regions. Reporting at \$261, it may not have been the highest, but it rose the most showing almost 18 percent more than in 1996. Just about 3,400 old and new employees in the region for 1998 likely appreciated the increase.

Of all new employment for 1998, most was attributable to the Amusement and recreation services industry. It was not the largest tourism industry, but it rose the most, by about 40 percent over the 1996 figure of 436. Eating and drinking places, the largest of the tourism industries based on employment, actually declined by 19 positions.

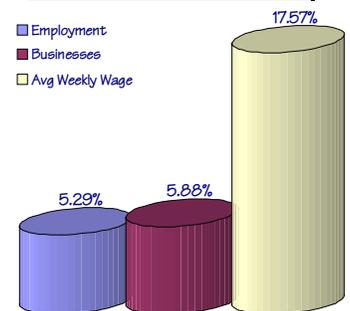
When looking at the change in employment in Eating and drinking places during the summer months, the three-year (1996-1998) average increase in August over that of April was nine percent. Lodging facilities average summer employment increased a significant 146 percent over April's average employment. This brought the average three-year high to approximately 650 employees from a low of 261. Amusement and recreation services average August employment increased to 351 employees, up from April's average of 142.

Dartmouth-Lake Sunapee
Percent Change in Employment
1996-1998



Of all new employment for 1998, most was attributable to the Amusement and recreation services industry.

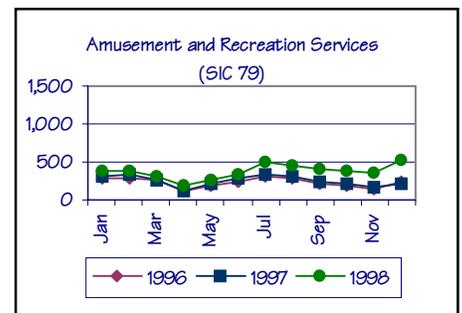
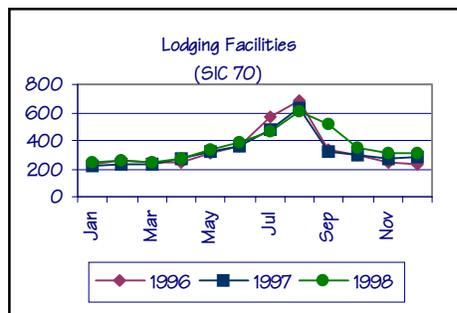
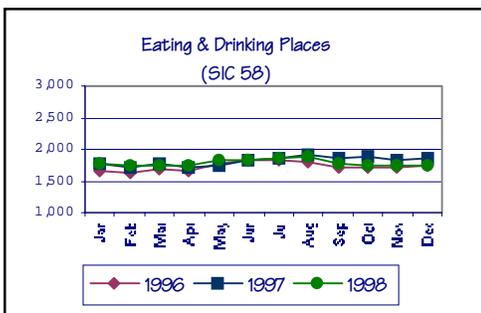
Dartmouth-Lake Sunapee
Percent Change 1996-1998



Dartmouth-Lake Sunapee Region
Percent Change in Avg Weekly Wage
1996-1998

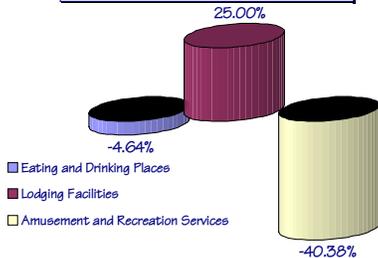


At the end of 1996, tourism employment within this region accounted for just about seven percent of total covered employment of 43,939. The end of 1998 saw no change with it still accounting for about seven percent of total covered employment of 46,513.



Great North Woods Region - 1996, 1997, and 1998

Great North Woods
Percent Change in Employment
1996-1998



Many hikers have trekked their way to the green woods and tranquil nature that awaited them here in this region. Even with slightly fewer employees to greet them, the visitor was still in for a unique Great North Woods experience.

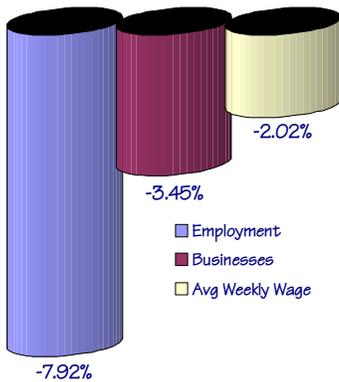
Overall, tourism employment for this region saw a decline of approximately 8 percent from 1996 to 1998. Most of the decline was in the downturn of 22 employees within Eating and drinking places and 21 employees within Amusement and recreation services. Average weekly wage also decreased from \$231 to \$226 over the 1996-1998 period.

While some regions relied on tourism employment more heavily, this region relied less on it.

While some regions relied on tourism employment more heavily, this region relied less on it. At the end of 1996, tourism employment within this region accounted for 5 percent of total covered employment of 10,594.

At the end of 1998, tourism employment within this region actually accounted for less than 5 percent of total covered employment of 10,929.

Great North Woods Region
Percent Change 1996-1998



When looking at the change in employment during the summer months, the three-year (1996-1998) average August employment for Eating and drinking places is 503, 21.0 percent over that of April. Lodging facilities average summer employment increased by a substantial 244 percent over April's average employment of only 184. This brought the average three-year employment within Lodging facilities to 632. Amusement and recreation services average August employment increased to 69 employees, up from April's average of 27.

Great North Woods
Percent Change in Avg Weekly Wage
1996-1998

