

## TRADE & TOURISM

### Accommodation and Food Services

Employment in the accommodation and food services industry sector increased from 58,100 workers in 2016 to 60,400 in 2019, an increase of 3.8 percent. This growth was the result of increased food services and drinking places employment, which grew from 48,700 workers in 2016 to 51,000 in 2019. Employment in accommodations declined slightly, from 9,500 workers in 2016 to 9,400 in 2019.

Accommodation and food services was one of the industry sectors most affected by the coronavirus pandemic. Throughout 2020, this sector faced multiple restrictions intended to slow the spread of the coronavirus pandemic. In-person dining was restricted between March and June, as were most hotel and motel bookings.<sup>1</sup> After reopening, restaurants, hotels, and motels all faced capacity restrictions. These restrictions, along with voluntary changes in consumer behavior, affected the accommodation and food services sector more than most industries. While total private employment fell 18 percent between February 2020

and April 2020, employment in accommodation and food services declined 55 percent, losing 31,800 jobs.

Although accommodation and food services employment increased by 21,000 jobs between April 2020 and December 2020, there were still 11,300 fewer workers employed in this industry than in the previous December.<sup>2</sup> Over the first six months of 2021, employment growth exceeded the usual seasonal increase, but June 2021 employment remained 6,600 workers lower than June 2019 employment.

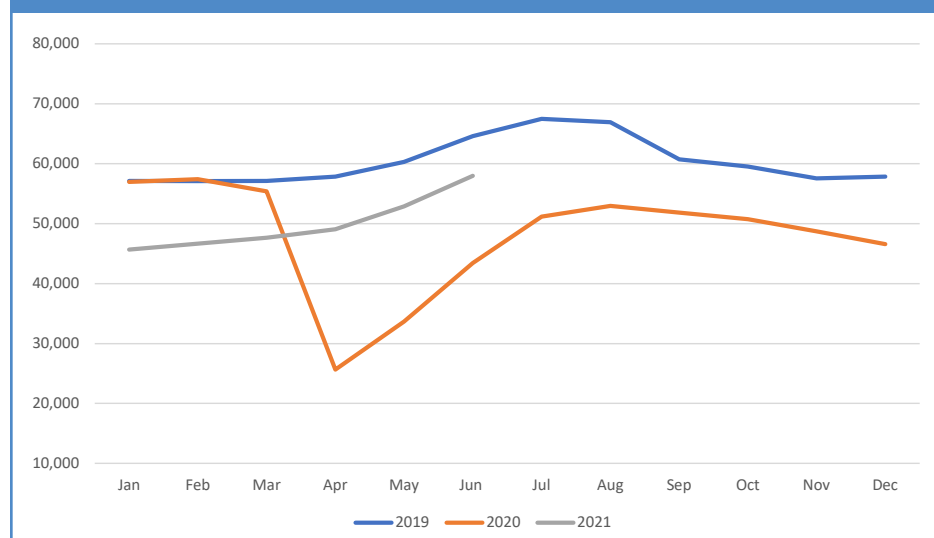
### Retail Trade

Retail trade is the second largest industry in New Hampshire, but employment in this industry sector has declined since 2016. Employment fell from an annual average of 95,900 workers in 2016 to 94,000 in 2019, a decline of 2.0 percent. Several factors have affected retail employment, including a transition from in-person shopping

to online retail, and increasing automation, allowing retail businesses to provide more services with fewer employees.<sup>3</sup> Even as employment declined between 2016 to 2019, Gross Domestic Product for the retail trade industry increased 9.5 percent.

During the early months of the coronavirus pandemic, retail trade employment declined by 16,400 workers, but employment had nearly returned to pre-pandemic levels by the end of 2020.

### ACCOMMODATION AND FOOD SERVICES EMPLOYMENT



Source: New Hampshire Employment Security, Quarterly Census of Employment and Wages

- 1 NHPR Staff, New Hampshire Public Radio, "What's Open (And What's Not Open) In New Hampshire," 7/15/2020. <https://www.nhpr.org/nh-news/2020-07-15/updated-whats-open-and-whats-not-open-in-new-hampshire>.
- 2 Accommodation and food services employment has a seasonal employment pattern, so over-the-year comparisons are most appropriate. Covered employment data are not seasonally adjusted.
- 3 Thomas Frank, CNBC, "Booming jobs market is leaving the retail industry behind," 4/6/2019. <https://www.cnbc.com/2019/04/05/booming-jobs-market-is-leaving-the-retail-industry-behind.html>.

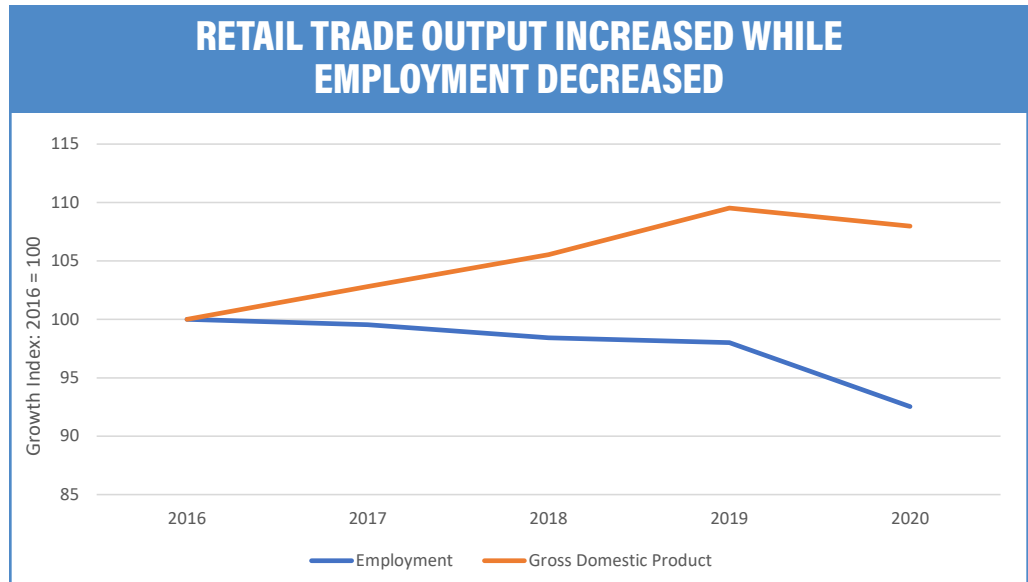
In December 2020, New Hampshire retail trade establishments employed 94,800 workers, just 2,300 fewer than had been employed in December 2019.

Retail trade employment may continue to grow in the short term, as the industry regains jobs lost during the pandemic. However, with employment trending downward before the pandemic, it is unlikely that retail trade will reach 2019 employment levels. New Hampshire Employment Security's Long-Term Industry Projections expect retail trade employment to fall to 86,000 by 2030, an 8.5 percent decrease from 2019 employment.

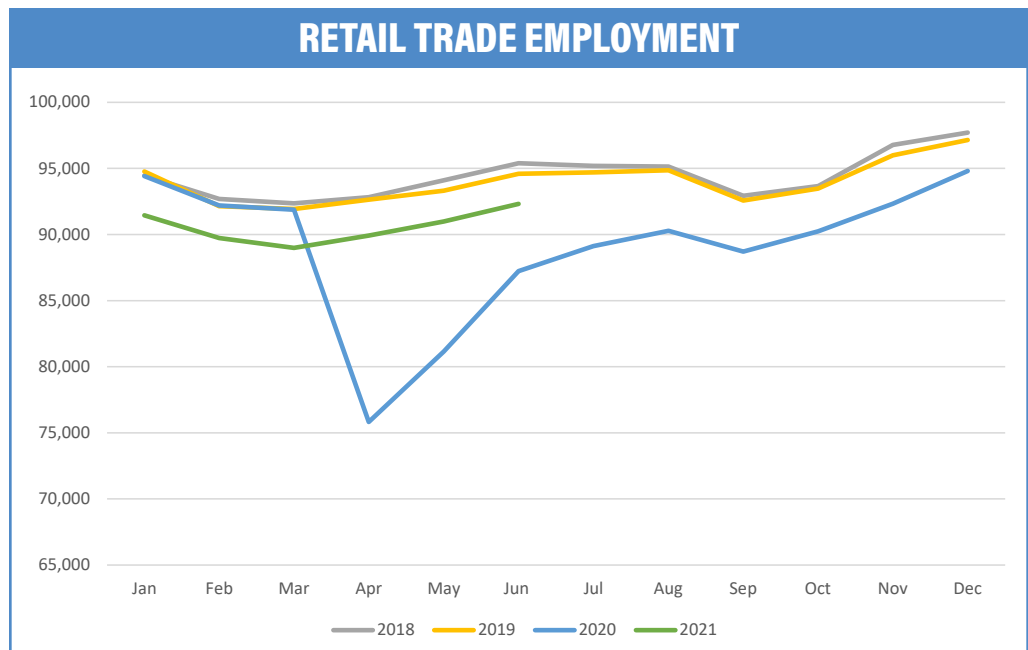
Although total retail trade employment declined since 2016, some subsectors have experienced employment growth. Employment in furniture and home furnishings stores grew 6.1 percent between 2016 and 2019, before declining nearly ten percent in 2020. Three subsectors – food and beverage stores, building material and garden supply stores, and nonstore retailers – grew not just from 2016 to 2019, but in 2020 as well. Nonstore

retailers experienced the fastest growth between 2016 and 2020, growing 14.0 percent.<sup>4</sup>

Other subsectors experienced greater than average employment losses. Employment in clothing and clothing accessories stores declined 36 percent between 2016 and 2020. While approximately two-thirds of job losses occurred in 2020, employment

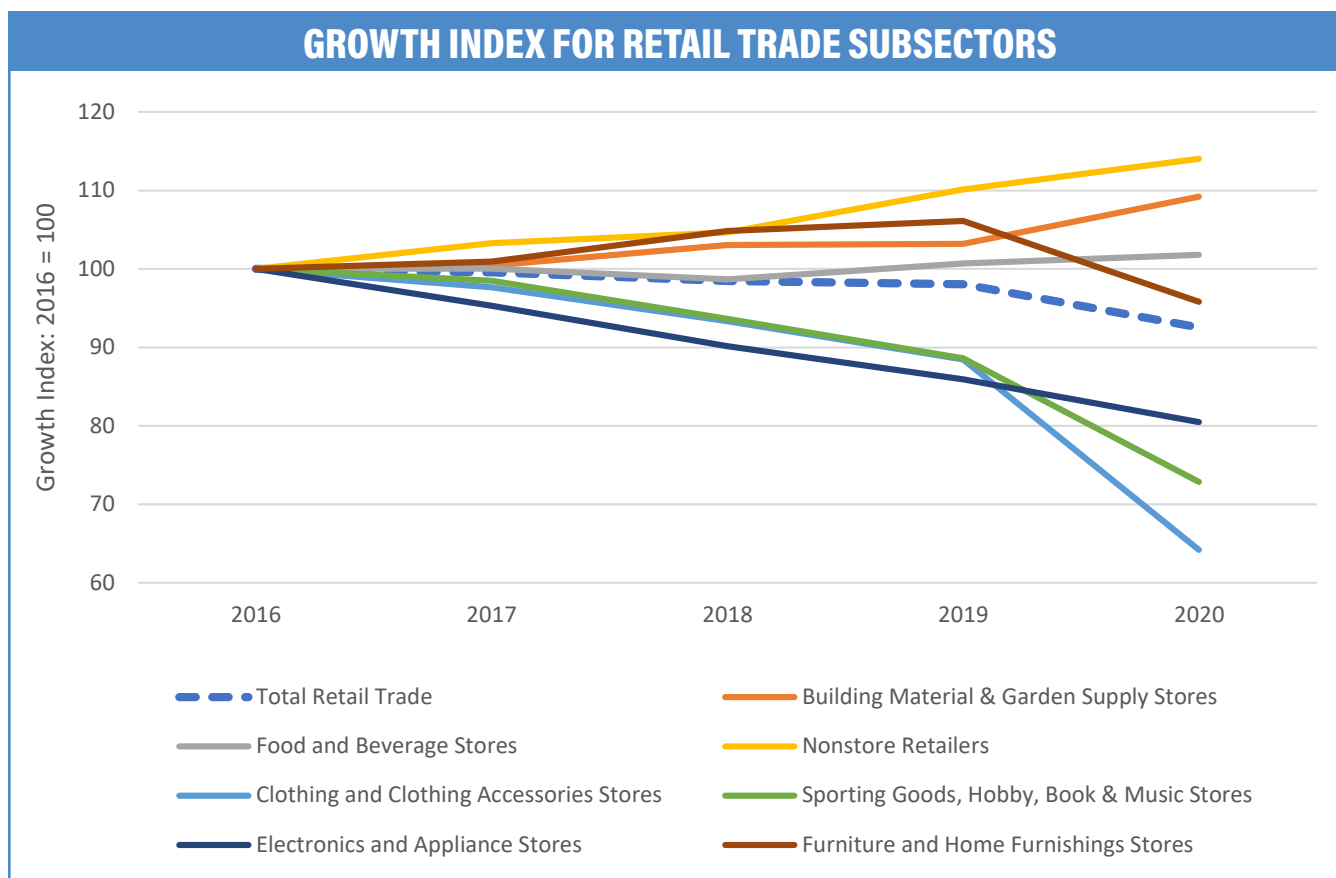


Source: New Hampshire Employment Security, Quarterly Census of Employment and Wages, U.S. Bureau of Economic Analysis, Gross Domestic Product



Source: New Hampshire Employment Security, Quarterly Census of Employment and Wages

<sup>4</sup> Nonstore retailers include electronic shopping and mail order houses, vending machine operators, and direct selling establishments, including deliveries of heating fuel; deliveries of products such as bottled water, newspapers, or frozen foods; door-to-door sales; street vendors (except food), and temporary location sellers like produce stands or sales of Christmas trees.



Source: New Hampshire Employment Security, Quarterly Census of Employment and Wages

in this subsector declined 12 percent between 2016 and 2019. Employment in sporting goods, hobby, book, and music stores declined 27 percent between 2016 and 2020, and employment in electronics and appliance stores declined 20 percent.

## Tourism

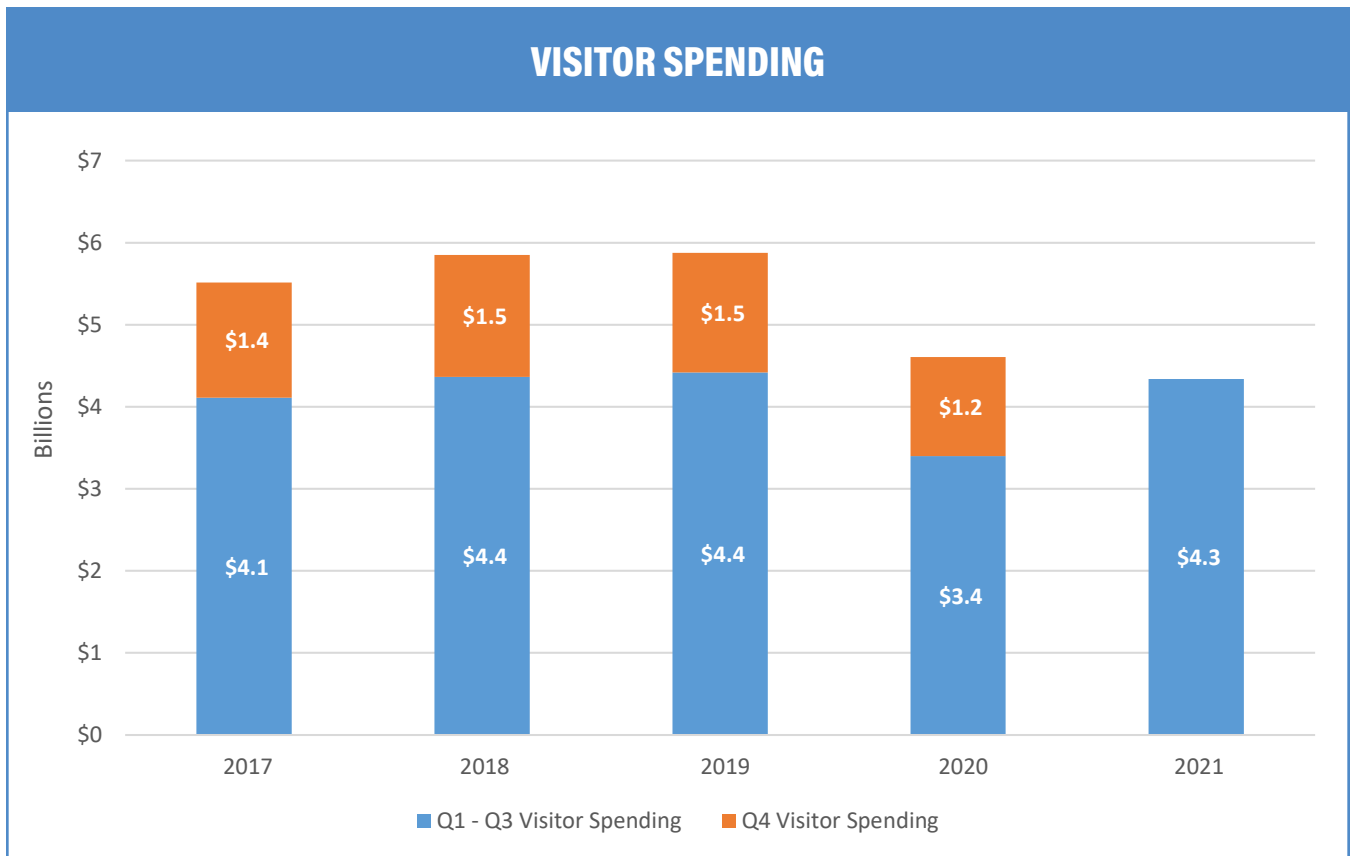
Tourism brings millions of visitors to New Hampshire every year, and billions of dollars into New Hampshire's economy. Prior to the pandemic, tourism activity in New Hampshire had grown steadily. According to data from the New Hampshire Division of Travel and Tourism Development, overnight visitor trips to New Hampshire increased from 10.6 million in 2016 to 11.5 million in 2019, while total visitor spending increased from \$5.4 billion to \$5.9 billion.<sup>5</sup>

Because of the coronavirus pandemic, both interstate and international travel were restricted in 2020, and many tourism-related businesses faced capacity restrictions. Despite these challenges, the number of visitors trips to New Hampshire increased 0.7 percent from 2019 to 2020.<sup>6</sup> However, the average visitor spent less per night, and total visitor spending fell 22 percent, to approximately \$4.6 billion.

The number of visitors in 2021 is on pace to exceed the number of visitors in 2020. Through the third quarter of 2021, there had been 9.8 million visitor trips to New Hampshire. This was over one million trips more than the first three quarters of 2019 and 2020, when there were 8.5 million and 8.4 million visitor trips, respectively.

<sup>5</sup> Dean Runyan Associates, New Hampshire Travel Impacts: The Economic Impact of Travel on New Hampshire, 2011 - 2017, p.60 <https://www.visitnh.gov/getmedia/13836d64-8532-4712-8f7f-dc123ca15b4d/NHImpact2011-2017.pdf>.

<sup>6</sup> Visitors include resident or non-resident travelers that stay overnight away from home in paid or unpaid accommodations, or day visitors that travel at least fifty miles one-way from home on non-routine trips.



Source: NH Division of Travel and Tourism, Dean Runyan Associates, TravelStats

Even with a record number of visitors, visitor spending was not on pace to exceed pre-pandemic highs. Visitor spending averaged \$136 per night in 2019, before falling to \$110 per night in 2020. Visitor spending per night increased throughout 2021, from \$121 per night in the first quarter to

\$133 per night in the third quarter. Total visitor spending through the first three quarters of 2021 was approximately \$80 million less than visitor spending through the first three quarters of 2019.

– Greg David

RETAIL EMPLOYMENT	2016	2017	2018	2019	2020
Food and beverage stores	22,023	22,037	21,729	22,173	22,418
Annual percent change	1.4%	0.1%	-1.4%	2.0%	1.1%
General merchandise stores	15,283	15,151	14,691	14,157	13,369
Annual percent change	1.1%	-0.9%	-3.0%	-3.6%	-5.6%
Furniture and home furnishings stores	2,551	2,574	2,673	2,707	2,444
Annual percent change	3.5%	0.9%	3.8%	1.3%	-9.7%
Electronics and appliance stores	3,425	3,265	3,064	2,943	2,756
Annual percent change	-0.6%	-4.7%	-6.2%	-3.9%	-6.4%
Building material & garden supply stores	9,389	9,430	9,673	9,691	10,252
Annual percent change	3.1%	0.4%	2.6%	0.2%	5.8%
Health and personal care stores	4,367	4,301	4,242	4,155	3,786
Annual percent change	-1.0%	-1.5%	-1.4%	-2.1%	-8.9%
Motor vehicle & parts dealers	12,544	12,456	12,590	12,702	11,506
Annual percent change	1.5%	-0.7%	1.1%	0.9%	-9.4%
Gasoline stations	4,438	4,465	4,442	4,496	4,278
Annual percent change	-0.9%	0.6%	-0.5%	1.2%	-4.8%
Clothing and clothing accessories stores	6,550	6,419	6,115	5,794	4,205
Annual percent change	-1.6%	-2.0%	-4.7%	-5.2%	-27.4%
Nonstore retailers	5,337	5,512	5,584	5,878	6,085
Annual percent change	4.8%	3.3%	1.3%	5.3%	3.5%
Sporting Goods, Hobby, Book, and Music Stores	4,454	4,387	4,173	3,947	3,245
Annual percent change	-2.8%	-1.5%	-4.9%	-5.4%	-17.8%
Miscellaneous Store Retailers	5,557	5,491	5,463	5,378	4,414
Annual percent change	1.1%	-1.2%	-0.5%	-1.6%	-17.9%
New Hampshire total	95,919	95,470	94,410	94,021	88,760
Annual percent change	1.1%	-0.5%	-1.1%	-0.4%	-5.6%
New England total	804,198	801,938	796,211	786,371	721,564
Annual percent change	0.5%	-0.3%	-0.7%	-1.2%	-8.2%
United States total	15,824,396	15,854,454	15,791,102	15,602,881	14,758,276
Annual percent change	1.2%	0.2%	-0.4%	-1.2%	-5.4%

Source: U.S. Bureau of Labor Statistics, ELMI Analysis. Last Update 12/15/21

ACCOMMODATION AND FOOD SERVICES EMPLOYMENT	2016	2017	2018	2019	2020
Accommodation	9,478	9,537	9,527	9,411	6,328
Annual percent change	0.4%	0.6%	-0.1%	-1.2%	-32.8%
Food Services and Drinking Places	48,660	49,414	50,149	50,950	41,461
Annual percent change	2.0%	1.5%	1.5%	1.6%	-18.6%
New Hampshire total	58,138	58,951	59,676	60,362	47,788
Annual percent change	1.7%	1.4%	1.2%	1.1%	-20.8%
New England	624,405	635,732	643,282	650,353	473,459
Annual percent change	2.3%	1.8%	1.2%	1.1%	-27.2%
United States total	13,318,703	13,606,761	13,834,194	14,030,794	11,072,658
Annual percent change	2.9%	2.2%	1.7%	1.4%	-21.1%

Source: U.S. Bureau of Labor Statistics, ELMI Analysis. Last Update 12/15/21

HOSPITALITY: ESTIMATED SALES (\$ millions)	2016	2017	2018	2019	2020
Meals	\$2,982.8	\$3,093.9	\$3,256.7	\$3,384.6	\$2,774.0
Annual percent change	6.6%	3.7%	5.3%	3.9%	-18.0%
Rentals (Includes Motor Vehicle Rentals)	\$598.4	\$636.0	\$695.3	\$711.8	\$517.6
Annual percent change	4.2%	6.3%	9.3%	2.4%	-27.3%

Source: New Hampshire Office of Strategic Initiatives, ELMI Analysis. Last Update 12/15/21

LIQUOR SALES (State Fiscal Year - July 1 to June 30)	2015-16	2016-17	2017-18	2018-19	2019-20
Retail & Wholesale Gross Sales (\$ millions)	\$682.4	\$702.7	\$712.4	\$729.1	\$765.6
Fiscal year percent change	5.5%	3.0%	1.4%	2.3%	5.0%
Retail & Wholesale Net Sales <sup>a</sup> (\$ millions)	\$665.7	\$684.8	\$691.9	\$706.1	\$739.6
Fiscal year percent change	5.5%	3.0%	1.4%	2.3%	5.0%
Gross Profit From Sales (\$ millions)	\$195.0	\$200.0	\$200.8	\$208.0	\$212.6
Fiscal year percent change	5.2%	2.6%	0.4%	3.6%	2.2%

<sup>a</sup> Total sales less discounts and fees

Source: New Hampshire Liquor Commission, ELMI Analysis. Last Update 12/15/2021

HUNTING AND FISHING	2016	2017	2018	2019	2020
Hunting Licenses, Tags, Permits and Stamps					
Resident	47,073	45,893	45,590	45,644	49,742
Non-resident	10,599	10,108	9,972	10,631	10,887
Moose Hunt Lottery					
Applications	9,590	8,261	6,142	7,108	7,217
Permits Drawn	71	51	51	49	49
Fishing Licenses, Tags, Permits and Stamps					
Resident	106,910	105,872	106,242	108,060	135,521
Non-resident	49,657	50,128	50,239	51,539	55,513

Source: New Hampshire Department of Fish and Game. Last Update 5/18/2022

<b>OUTDOOR RECREATION VALUE ADDED (\$ thousands)</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>
Total Outdoor Recreation Value Added	\$2,446,940	\$2,509,521	\$2,530,820	\$2,645,637	\$2,261,417
Total Core Outdoor Recreation	\$1,444,305	\$1,455,247	\$1,499,269	\$1,541,008	\$1,400,472
Multi-use Apparel and Accessories <sup>b</sup>	\$309,881	\$320,003	\$323,926	\$329,653	\$254,132
Hunting/Shooting/Trapping	\$215,014	\$187,424	\$193,479	\$176,406	\$174,104
Snow Activities	\$203,363	\$194,855	\$202,670	\$220,737	\$169,594
Boating/Fishing	\$123,847	\$130,068	\$135,813	\$144,531	\$204,174
Supporting Outdoor Recreation	\$1,002,635	\$1,054,275	\$1,031,551	\$1,104,629	\$860,944
Travel and Tourism <sup>c</sup>	\$661,017	\$705,682	\$696,231	\$749,423	\$538,620
<sup>b</sup> Consists of backpacks, bug spray, coolers, general outdoor clothing, GPS equipment, hydration equipment, lighting, sports racks, sunscreen, watches, and other miscellaneous gear and equipment.					
<sup>c</sup> Travel and tourism expenses includes only expenses for travel at least 50 miles away from home.					
Source: U.S. Bureau of Economic Analysis. Last Update 12/15/2021					

<b>TRAVEL AND TOURISM<sup>d</sup></b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>
All Visitor Spending (\$ billions)	\$5.4	\$5.5	\$5.9	\$5.9	\$4.6
Annual percent change	-0.4%	3.0%	6.1%	0.4%	-21.6%
Overnight Visitor Volume (Millions of Person Trips)	10.6	10.9	11.3	11.5	11.5
Annual percent change	0.2%	2.4%	4.1%	0.9%	0.7%
Average Overnight Spending: Per Person Night	\$129.6	\$132.1	\$136.6	\$135.7	\$110.0
Annual percent change	-0.3%	2.0%	3.4%	-0.7%	-18.9%
<sup>d</sup> Includes both resident and non-resident spending and volume					
Source: New Hampshire Department of Business and Economic Affairs. Last Update 12/15/2021					

<b>VISITOR SPENDING BY TYPE OF ACCOMODATION (\$ millions)</b>	<b>2016</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>
Hotel, Motel	\$2,970.6	\$3,100.3	\$3,337.9	\$3,341.7	\$2,406.7
Day Travel	\$845.7	\$861.9	\$903.8	\$904.8	\$768.0
Private Home	\$781.4	\$803.2	\$830.4	\$827.8	\$740.9
Vacation Home	\$256.4	\$259.7	\$264.0	\$264.8	\$226.1
Campground	\$197.8	\$211.9	\$246.0	\$264.0	\$269.7
Source: New Hampshire Department of Business and Economic Affairs. Last Update 12/15/2021					
Prepared by: New Hampshire Employment Security, Economic and Labor Market Information Bureau					
www.nhes.nh.gov/elmi   (603) 228-4124					