NEW HAMPSHIRE FISCAL YEAR 2012 TOURISM SATELLITE ACCOUNT

Prepared for the New Hampshire

Division of Travel and Tourism Development

by

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August 2013

THE NEW HAMPSHIRE TRAVEL AND TOURISM INDUSTRY DURING FY 2012

Executive Summary

Visitor Counts and Spending

During fiscal year (FY) 2012, 34.2 million travelers and tourists visited New Hampshire and spent $4.42 billion. This estimated direct traveler spending supported additional sales of $2.1 billion in supply industries (indirect spending by travelers). Earnings of the workers in the tourism industry and its supply industries supported additional sales of $7.3 billion (induced spending by travelers). In sum, the total contribution to the state's economy of the traveler spending (direct, indirect and induced) was $13.8 billion. Economic contribution of the tourism industry is reported in Table 11 and 12.

Direct spending of $4.42 billion is an increase of 12.0 percent over the FY 2010 level, due to a slow but steady economic recovery from the Great Recession during FY 2010. The direct spending by travelers was 6.9 percent of gross state product, up from 6.6 percent in FY 2010. This change in spending indicates that the travel and tourism industry increased at slightly faster rate than the rest of the state's economy between FY 2010 and FY 2012.

Breakouts of traveler spending are reported in Table 1. There are important spending patterns that differentiate New Hampshire tourism from most other states. First, travelers to New Hampshire spend a larger share of their money at retail stores, compared to most other states. Spending by travelers at retail stores bounced back in FY 2012 after decreasing by more than 20 percent between FY 2008 and FY 2010. Secondly, restaurant spending is larger in comparison to lodging expenses in contrast with tourist spending patterns for most other states. Due to its nearness to large cities, New Hampshire tourism has a much larger proportion of day trips included in its total visitor days and about one-third of overnight visitors to New Hampshire stay with friends or relatives or at second homes.

Table 11 shows that the typical tourist and traveler spent 62 cents of every dollar at the hospitality and leisure sector; 26 cents at retail stores (including food and gasoline purchases); 7 cents for government services and licenses; 3 cents at the wholesale trade and transportation sector; 1.3 cents for the other services sector; 1.1 cents for agricultural products, and 0.8 cents for educational and health care services during FY 2012.

The number of visitor trips increased by 1.8 percent between FY 2010 and FY 2012, after decreasing 0.7 percent between FY 2008 and FY 2010, as the economy recovered from the Great Recession. The number of visitor days increased by an estimated 4.5 percent during that two year time period due to an increase in the average length of stay. The annual average spending per visitor day was $82.23, 7.2 percent higher than $76.71 spent in FY 2010.

Visitor counts and spending by season and region were estimated and reported in Tables 17 – 26. The summer season attracts more visitors than any other season and has the greatest total spending by visitors. When examined by region, the Merrimack Valley Region attracts more visitors than other regions in the state and has the greatest spending by visitors during FY 2012.

Payrolls and Jobs

The 4.42 billion dollars in direct traveler spending in FY 2012 supported an estimated 68,355 direct full and part-time jobs, with payrolls and other earnings of 1,607 million dollars. The 2.1 billion dollars in indirect spending by traveler-supported businesses sustained an estimated additional 14,010 full and part-time jobs with a total payroll and earnings of 734 million dollars. The direct and indirect jobs supported by tourism spending were 9.9 percent of all employment in the state, higher than the 9.2 percent of all jobs in FY 2010. The direct and indirect payroll was 4.2 percent of the total state-wide payroll, down from 5.4 percent in FY 2010. Estimated jobs and payrolls supported by traveler spending are reported in Table 13 and 14.

Payroll and earnings for employees directly supported by traveler spending was 36.4 percent of total sales to travelers in FY 2012, up from 35.4 percent in FY 2010. This change reflects the increasing proportion of total visitor spending at restaurants and for recreation, with less spending at retail stores. Average payroll per employee (including self-employed proprietors) decreased by 1.2 percent after inflation adjustment during FY10-FY12. Employment per million dollars of sales increased by 13.7 percent during the same period.

Government Revenue

The largest single source of traveler spending which becomes State government revenues is the rooms and meals tax. It is estimated that $150 million resulted from traveler spending, up from $132 million in FY 2010. This is 62 percent of all rooms and meals tax revenues collected in FY 2012, with the other 38 percent from resident non-tourist spending on meals. Total State government revenues from fees and taxes paid by travelers are estimated at $390 million for FY 2012 up from $378 million in FY 2010. During the same period, the state's general and educational funds (the state's primary operating funds) declined by 2%.

Collections from State taxes and fees supported by traveler spending have easily out-distanced the rate of inflation since the bottom of the recession of 1991. About 8.8 cents of every dollar spent by travelers in New Hampshire in FY 2012 ended up in the State treasury, down from 9.6 cents in FY 2010, largely due to a slow growth in the state's economy and revenue since the Great Recession.

Importance of Travel and Tourism to the state

Travel and tourism spending in New Hampshire in comparison with traveler spending nationally is more than three times as large as the state's share of the national population. Travel and tourism was the second largest export sector in terms of employment size, as shown in Table 7. Travel and tourism spending supports more employment per dollar of receipts than any other economic sector. It is also one of the largest sources of revenue to the state government. If second homes are included as tourism related, then travel and tourism related properties are one of the larger sources of property tax payments to local governments.

1. TRAVELER SPENDING

Table 1: Traveler Spending by Category

	FY 2012	% of Total
Eating and Drinking	$1,334	30.2%
Accommodations	$738	16.7%
Recreation	$716	16.2%
Food Stores	$351	8.0%
Retail Stores	$584	13.2%
Ground Transportation	$424	9.6%
Air Trans. & Services	$270	6.1%
Total	$4,417	100.0%

In millions of dollars

Spending breakouts by category are reflective of the nature of the state's tourism sector. The state's proximity to large cities means that a larger share of travelers are day trippers, who tend to spend more on restaurant meals, shopping and recreation than on lodging.

Table 2: Traveler Spending by Travel Region

Spending breakouts by travel region shows the relative importance of the seven travel regions in the state's tourism sector, and the performance of each individual region during the study period.

The estimate for Great North Woods in FY10 does not include sales of BALSAMS since it was estimated by a new model that reflects new information including the closure of BALSAMS. Thus, the true percent change for the region is worse than the reported figure by as much as the loss of the Grand Resort.

	FY 10	FY 12	% Change
Great North Woods	65	83	27.7%
White Mountain	854	1,108	29.7%
Lakes	493	526	6.8%
Dart-Lake Sunapee	214	206	-3.8%
Monadnock	249	246	-1.1%
Merrimack Valley	1,254	1,325	5.6%
Seacoast	850	923	8.6%
Total	3,979	4,417	11.0%

In millions of dollars

Table 3

FISCAL YEAR 2012 ROOMS AND MEALS SALES TO TRAVELERS

Sales are 11.1 X Tax Receipts Minus Estimated Sales to Non-travelers

County	FY 2011	% State	FY 2012	% State	% Change
Belknap	$102.21	6.6%	$112.51	6.8%	10.1%
Carroll	$170.19	11.0%	$178.15	10.7%	4.7%
Cheshire	$59.23	3.8%	$56.38	3.4%	-4.8%
Coos	$60.75	3.9%	$56.97	3.4%	-6.2%
Grafton	$185.65	12.0%	$199.40	12.0%	7.4%
Hillsborough	$365.67	23.5%	$397.24	23.9%	8.6%
Merrimack	$102.95	6.6%	$120.88	7.3%	17.4%
Rockingham	$407.48	26.2%	$436.89	26.2%	7.2%
Strafford	$77.34	5.0%	$82.57	5.0%	6.8%
Sullivan	$21.93	1.4%	$23.64	1.4%	7.8%
State	$1,553.41	100.0%	$1,664.62	100.0%	7.2%

Region					
Great North Woods	$22.42	1.4%	$17.35	1.0%	-22.6%
White Mountain	$310.03	20.0%	$327.54	19.7%	5.6%
Lakes Region	$175.54	11.3%	$190.96	11.5%	8.8%
Dartmouth-L.S.	$75.69	4.9%	$83.20	5.0%	9.9%
Monadnock	$102.75	6.6%	$103.65	6.2%	0.9%
Merrimack Valley	$515.62	33.2%	$565.45	34.0%	9.7%
Seacoast	$351.37	22.6%	$376.47	22.6%	7.1%

This program calculates Regions' sales from Counties' sales.

Sales are in millions of dollars. DRA data adjusted by INHS.
Sales do not include campgrounds or vehicle rentals.
These numbers do not include tips and state tax collected.

Table 4

NEW HAMPSHIRE TRAVEL SPENDING, EMPLOYMENT AND RELATED IMPACTS: FY 1988 TO FY 2012

	1988	1990	1992	1994	1996	1998	2000	2002	2004	2006	2008	2010	2012
Spending													
Eating and Drinking	$504	$577	$557	$660	$719	$782	$892	$1,063	$916	$925	$1,101	$1,160	$1,334
Accommodations	$263	$267	$258	$277	$336	$387	$485	$520	$501	$516	$759	$624	$738
Recreation	$255	$300	$327	$331	$400	$538	$544	$665	$689	$704	$617	$649	$716
Food Stores	$200	$208	$217	$215	$222	$247	$267	$282	$297	$308	$299	$345	$351
retail Stores	$494	$487	$475	$607	$480	$600	$730	$650	$849	$901	$882	$508	$584
Ground Transportation	$193	$200	$207	$190	$225	$228	$245	$235	$335	$409	$404	$409	$424
Air Trans. & Services	$116	$146	$195	$230	$282	$323	$466	$319	$378	$427	$440	$248	$270
Total	$2,025	$2,185	$2,236	$2,510	$2,664	$3,105	$3,629	$3,734	$3,965	$4,190	$4,502	$3,943	$4,417
Total in 1992 dollars	$2,403	$2,346	$2,236	$2,375	$2,383	$2,673	$2,957	$2,912	$2,945	$2,916	$2,934	$2,537	$2,699
Employment													
Eating and Drinking	22,093	24,570	23,111	24,083	23,731	25,428	26,280	26,293	26,514	25,037	24,043	24,464	28,552
Accommodations	12,024	11,369	11,353	10,107	11,124	12,580	13,353	12,457	12,583	12,406	15,067	13,160	15,804
Recreation	11,659	12,775	13,562	12,078	12,661	14,886	14,365	16,449	15,834	15,135	12,417	13,747	15,327
Food Stores	1,874	1,815	1,845	1,608	1,714	1,745	1,712	1,975	2,212	1,788	1,579	1,518	1,462
retail Stores	4,628	4,249	4,038	4,538	4,226	5,048	5,227	4,279	5,976	3,249	3,421	2,235	2,429
Ground Transportation	1,809	1,746	1,761	1,421	1,533	1,574	1,558	1,516	2,215	2,214	1,955	1,800	1,763
Air Trans. & Services	1,366	1,602	2,086	2,162	2,550	2,878	6,279	3,686	3,620	4,897	3,995	3,262	3,017
Total	55,453	58,126	57,756	55,997	57,539	64,139	68,774	66,655	68,954	64,726	62,477	60,186	68,355
Payroll	$684	$715	$770	$801	$867	$1,029	$1,194	$1,240	$1,371	$1,487	$1,516	$1,397	$1,607
State Govt Revenue	$198	$218	$226	$248	$255	$287	$307	$317	$325	$340	$361	$378	$390

Table 5: Jobs from Direct Traveler Spending

	FY2012	% of Total
Eating and Drinking	28,552	47.5%
Accommodations	15,804	26.3%
Recreation	15,327	25.5%
Food Stores	1,462	2.4%
Other Retail	2,429	4.0%
Ground Transport	1,763	2.9%
Services & Air Trans	3,017	5.0%
Total	68,355	113.7%

This table shows the full and part time employment per million dollars of sales in each industry. The hospitality industry's share of total jobs (Table 5) is much larger than its share of total spending (Table 1), reflecting that there is a greater share of part-time and seasonal jobs in the industry.

Table 6: Traveler Spending Impacts Summary

The dollars are expressed in millions of dollars, and the number of jobs is expressed in terms of number of jobs per each million of traveler spending.

Payroll includes wage and salary disbursements, supplements to wages and salaries, and proprietors' incomes.

	FY 10	FY 12	% Change
Direct Spending	$3,943	$4,417	12.0%
Direct Payroll	$1,397	$1,607	15.0%
Direct Employment	60,126	68,355	13.7%
State Govt. Receipts	$378	$390	3.2%
Local Govt. Receipts	$40	$36	-8.8%

Breakouts of State Govt. Receipts

R&M	$149.80
State liquor store	$51.40
Business tax	$37.20
Tobacco/beer	$20.40
Lottery	$18.90
Parks and recreation	$17.30
Gas tax	$12.60
Tolls	$9.00
Communication tax	$3.60
Other	$69.80

Breakouts of Local Govt. Receipts

Parks and Recreation	$18.4
Airport	$2.9
Parking	$0.7
Other Govt.	$14.5

Table 7: Direct Export Employment

	FY 2012	% of Total
Manufacturing	61,890	22.10%
Travel & Tourism	61,519	22.00%
Ed, HC Services	35,467	12.70%
Other Servcies	32,185	11.50%
Retail Trade	24,977	8.90%
WT/Trans	24,283	8.70%
Construction	22,920	8.20%
Util/Inf	6,861	2.50%
Fin, Ins, Real Est	6,462	2.30%
Ag, Min, For	2,868	1.00%
Total	279,432	100.00%

This table represents the number of full- and part-time employees in the industries that are supported by sales made outside New Hampshire.

Travel and Tourism not only includes the hospitality industry but also those portions of other industries that sell to non-resident tourists.

Educational and Health Care Services sells to out-of-state students and patients.

Retail Trade is ranked lower in export employment (Table 7) than total covered employment (Table 8) because the export employment doesn't include sales made to tourists, who are included in Travel and Tourism.

Table 8: Major New Hampshire Employment Sectors

The hospitality and leisure sector includes only private sector eating and drinking, accommodations, and recreation establishments. It does not include other tourism industries such as retail, and government recreational facilities supported by traveler spending.

	Covered Employment	% of Total
Retail Trade	93,708	22.6%
Health Services	84,495	20.4%
Manufacturing	66,402	16.0%
Hospitality & Leisure	63,896	15.4%
Prof/Technical Services	29,954	7.2%
Finance/Insurance	27,045	6.5%
Wholesale Trade	26,426	6.4%
Construction	22,253	5.4%
Total	414,177	100.0%

Table 9: Industry Purchases and Sales, Fiscal Year 2012

	Ag/Fr/Mining	Construction	Manufactrng	Hosp & Leisr	Retail	WTrd/Tran	Utl/Inf	FIRE	Ed/HC/SServ	OthServices	Gov't	Hshld Expn	Exports	TOTAL
Ag/For/Mining	$23	$61	$89	$14	$81	$147	$21	$13	$10	$12	$58	$110	$315	$954
	2.4%	1.0%	0.5%	0.4%	0.3%	0.7%	0.2%	0.1%	0.1%	0.1%	0.5%	0.2%		
Construction	$13	$129	$53	$72	$322	$84	$93	$81	$299	$185	$487	$1,499	$2,859	$6,178
	1.3%	2.1%	0.3%	2.0%	1.2%	0.4%	0.9%	0.6%	2.7%	1.6%	4.1%	2.7%		
Manufacture	$26	$240	$356	$7	$215	$422	$114	$13	$10	$12	$804	$55	$15,512	$17,786
	2.7%	3.9%	2.0%	0.2%	0.8%	2.0%	1.1%	0.1%	0.1%	0.1%	6.7%	0.1%		
Hospitality&Le	$2	$6	$36	$7	$27	$43	$21	$13	$22	$46	$80	$1,170	$2,157	$3,629
	0.2%	0.1%	0.2%	0.2%	0.1%	0.2%	0.2%	0.1%	0.2%	0.4%	0.7%	2.1%		
Retail Trade	$50	$321	$18	$29	$54	$211	$10	$13	$43	$35	$0	$19,159	$6,893	$26,835
	5.3%	5.2%	0.1%	0.8%	0.2%	1.0%	0.1%	0.1%	0.4%	0.3%	0.0%	34.7%		
WTrd/Tran	$143	$371	$2,668	$244	$3,220	$1,266	$311	$175	$364	$416	$260	$618	$11,049	$21,105
	15.0%	6.0%	15.0%	6.7%	12.0%	6.0%	3.0%	1.3%	3.2%	3.6%	2.2%	1.1%		
Utl/Inf	$74	$229	$978	$189	$1,073	$549	$207	$136	$336	$324	$87	$1,901	$4,274	$10,356
	7.7%	3.7%	5.5%	5.2%	4.0%	2.6%	2.0%	1.0%	3.0%	2.8%	0.7%	3.4%		
FIRE	$15	$117	$623	$116	$939	$780	$207	$635	$439	$474	$255	$7,772	$1,130	$13,502
	1.6%	1.9%	3.5%	3.2%	3.5%	3.7%	2.0%	4.7%	3.9%	4.1%	2.1%	14.1%		
Ed/HC/SServ	$4	$37	$107	$37	$295	$190	$93	$2,295	$128	$347	$2,100	$2,443	$3,138	$11,214
	0.4%	0.6%	0.6%	1.0%	1.1%	0.9%	0.9%	17.0%	1.1%	3.0%	17.6%	4.4%		
OtherServices	$28	$235	$712	$142	$939	$612	$300	$783	$332	$462	$1,044	$3,421	$2,536	$11,545
	2.9%	3.8%	4.0%	3.9%	3.5%	2.9%	2.9%	5.8%	3.0%	4.0%	8.7%	6.2%		
Gov't	$53	$227	$654	$358	$1,450	$823	$480	$506	$220	$424	$430	$3,469	$2,868	$11,962
	5.5%	3.7%	3.7%	9.9%	5.4%	3.9%	4.6%	3.7%	2.0%	3.7%	3.6%	6.3%		
Hshld Inc	$202	$2,602	$5,337	$1,667	$3,789	$3,219	$1,596	$3,573	$6,569	$7,656	$4,476	$0	$14,598	$55,286
	21.2%	42.1%	30.0%	45.9%	14.1%	15.3%	15.4%	26.5%	58.6%	66.3%	37.4%			
Imports	$323	$1,601	$6,157	$749	$14,431	$12,758	$6,903	$5,266	$2,441	$1,153	$1,880	$13,669		
	33.8%	25.9%	34.6%	20.6%	53.8%	60.4%	66.7%	39.0%	21.8%	10.0%	15.7%	24.7%		
TOTAL	$954	$6,178	$17,786	$3,629	$26,835	$21,105	$10,356	$13,502	$11,214	$11,545	$11,962	$55,286		$190,351
direct & indirect multiplier	1.63	1.46	1.49	1.48	1.45	1.35	1.26	1.47	1.28	1.33	1.65			
direct, indirect & induced multiplier	2.83	3.20	2.87	3.43	2.33	2.17	2.03	2.98	3.40	3.78	3.71	3.11		

Table 10: State-wide Employment, Fiscal Year 2012

	Ag/Fr/ Mining	Constructi on	Manufactrng	Hosp&Leisr	Retail	WTrd/Tra n	Utl/Inf	FIRE	Ed/HC/SS erv	OthServic es	Gov't	Hshld Expn	Exports	TOTAL
Ag/For/Mining	239	649	941	151	852	1,556	220	134	108	122	609	1,164	3,329	10,072
	2.4%	1.3%	1.3%	0.2%	0.7%	3.3%	1.3%	0.2%	0.1%	0.1%	0.7%			
Construction	101	1,037	428	580	2,578	674	746	653	2,399	1,482	3,906	12,015	22,920	49,520
	1.0%	2.1%	0.6%	0.7%	2.3%	1.4%	4.5%	0.8%	1.9%	1.0%	4.5%			
Manufacture	104	960	1,419	28	858	1,685	455	51	41	46	3,207	220	61,890	70,962
	1.0%	1.9%	2.0%	0.0%	0.8%	3.6%	2.7%	0.1%	0.0%	0.0%	3.7%			
Hospitality&Le	37	140	783	156	588	930	455	277	471	1,011	1,757	25,591	47,161	79,356
	0.4%	0.3%	1.1%	0.2%	0.5%	2.0%	2.7%	0.4%	0.4%	0.7%	2.0%			
Retail Trade	213	1,365	75	121	229	895	42	54	183	147	2	81,429	29,297	114,054
	2.1%	2.8%	0.1%	0.2%	0.2%	1.9%	0.3%	0.1%	0.1%	0.1%	0.0%			
WTrd/Tran	318	824	5,926	541	7,154	2,812	691	390	808	924	577	1,372	24,543	46,881
	3.2%	1.7%	8.4%	0.7%	6.3%	6.0%	4.2%	0.5%	0.6%	0.6%	0.7%			
Utl/Inf	118	367	1,571	303	1,724	882	333	218	540	520	139	3,054	6,864	16,632
	1.2%	0.7%	2.2%	0.4%	1.5%	1.9%	2.0%	0.3%	0.4%	0.3%	0.2%			
FIRE	86	672	3,561	665	5,372	4,465	1,184	3,632	2,510	2,711	1,459	44,464	6,462	77,244
	0.9%	1.4%	5.0%	0.8%	4.7%	9.5%	7.1%	4.7%	2.0%	1.8%	1.7%			
Ed/HC/SServ	48	419	1,219	419	3,363	2,167	1,063	26,194	1,462	3,956	23,966	27,881	35,811	127,967
	0.5%	0.8%	1.7%	0.5%	2.9%	4.6%	6.4%	33.9%	1.1%	2.6%	27.3%			
OtherServices	358	3,042	9,214	1,834	12,157	7,927	3,886	10,141	4,300	5,984	13,511	44,290	32,832	149,476
	3.6%	6.1%	13.0%	2.3%	10.7%	16.9%	23.4%	13.1%	3.4%	4.0%	15.4%			
Gov't	385	1,664	4,790	2,623	10,623	6,029	3,515	3,706	1,614	3,109	3,154	25,416	21,015	87,644
	3.8%	3.4%	6.8%	3.3%	9.3%	12.9%	21.1%	4.8%	1.3%	2.1%	3.6%			
Hshld Inc	3,110	23,764	19,054	49,639	14,258	3,397	759	12,854	82,776	112,514	24,897			
	30.9%	48.0%	26.9%	62.6%	12.5%	7.2%	4.6%	16.6%	64.7%	75.3%	28.4%			
Imports	4,957	14,616	21,981	22,295	54,299	13,462	3,284	18,941	30,754	16,950	10,459			
	49.2%	29.5%	31.0%	28.1%	47.6%	28.7%	19.7%	24.5%	24.0%	11.3%	11.9%			
TOTAL	10,072	49,520	70,962	79,356	114,054	46,881	16,632	77,244	127,967	149,476	87,644			829,808
Direct & Indirect Multipliers	1.36	1.32	1.69	1.18	1.69	1.94	2.06	1.74	1.14	1.25	1.76			
Direct Indirect & Induced Multipliers	1.71	2.09	2.86	1.45	2.34	3.26	3.79	2.66	1.81	1.84	2.73	2.45		

2. Economic Contribution of Travel and Tourism Sector

Table 11: Direct and Indirect Traveler Spending

Sector	Direct	Indirect	Total	%
Ag/Mn/For	$49	$26	$75	1.1%
Construction	$0	$120	$120	1.8%
Manufacturing	$0	$87	$87	1.3%
Hosp & Leisure	$2,720	$16	$2,735	41.8%
Retail Trade	$1,129	$42	$1,172	17.9%
WTrd/Trans	$131	$436	$567	8.7%
Ut/Inf	$2	$248	$250	3.8%
FIRE	$0	$210	$210	3.2%
Ed/HC Services	$33	$226	$259	4.0%
Other Services	$56	$278	$334	5.1%
Government	$297	$430	$727	11.1%
Total	$4,417	$2,120	$6,537	100.0%

In millions of dollars

This table shows how direct spending by travelers spread across all eleven industrial sectors through the indirect multiplier. Indirect spending represents the purchases of supplies from industries where traveler spending occurred as a result of these direct sales. Total direct traveler spending was $4.4 billion and the sum of total direct and total indirect spending was $6.5 billion, which resulted in the indirect multiplier of 1.48. It means that for each dollar spent, an additional 48 cents had also circulated through the state's economy.

Table 12: Direct, Indirect and Induced Traveler Spending

This table shows how total direct spending by travelers spreads across all eleven industrial sectors and households through the indirect and induced multiplier. Induced spending represents sales made by workers who earned incomes as a result of direct and indirect traveler spending. Total direct traveler spending was $4.4 billion and the sum of total direct, total indirect and total induced spending was $13.7 billion, which resulted in the indirect and induced multiplier of 3.13. It means that for each dollar spent by the traveler, an additional $2.13 had also circulated through the state's economy.

The induced impact can be found by (Second Column of Table 12) – (Second Column of Table 11). The largest induced impact tends to be on retail trade, educational and health care services, and state and local governments. These are the sectors where households spend the greatest share of their incomes.

Sector	Direct	I&I	Total	%
Ag/Mn/For	$49	$45	$94	0.7%
Construction	$0	$273	$273	2.0%
Manufacturing	$0	$143	$143	1.0%
Hosp & Leisure	$2,720	$97	$2,817	20.4%
Retail Trade	$1,129	$1,268	$2,398	17.4%
WTrd/Trans	$131	$713	$844	6.1%
Ut/Inf	$2	$474	$476	3.4%
FIRE	$0	$833	$833	6.0%
Ed/HC Services	$33	$588	$622	4.5%
Other Services	$56	$659	$714	5.2%
Government	$297	$811	$1,108	8.0%
Households	$0	$3,485	$3,485	25.2%
Total	$4,417	$9,389	$13,806	100%

In millions of dollars

Table 13: Direct and Indirect Traveler Supported Employment

Sector	Direct	Indirect	Total	%
Ag/Mn/For	512	279	791	1.0%
Construction	-	962	962	1.2%
Manufacturing	-	347	347	0.4%
Hosp & Leisure	59,470	340	59,810	72.6%
Retail Trade	4,801	180	4,980	6.0%
WTrd/Trans	290	969	1,259	1.5%
Ut/Inf	3	399	402	0.5%
FIRE	-	1,203	1,203	1.5%
Ed/HC Services	382	2,577	2,959	3.6%
Other Services	719	3,604	4,323	5.2%
Government	2,178	3,151	5,328	6.5%
Total	68,355	14,010	82,365	100%

This table shows that how direct spending by travelers spreads employment across all eleven industrial sectors through the indirect multiplier effect. First Column shows direct employment that occurs in each economic sector as a result of total direct traveler spending. Total direct employment in the first Column is 67,822 jobs and the sum of total direct and total indirect jobs 81,723, which resulted in the indirect multiplier of 1.20. It means that for each one hundred jobs created by direct traveler spending, an additional 20 jobs had also been supported through the state's economy.

Table 14: Direct, Indirect and Induced Traveler Supported Employment

This table shows that how direct employment expands across all eleven industrial sectors and households through the indirect and induced multiplier effect. Total direct employment was 67,822 jobs and the sum of total direct and total indirect/induced jobs 106,560, which resulted in the indirect and induced multiplier of 1.57. It means that for each one hundred jobs created by direct traveler spending, an additional 57 jobs had also been supported through the state's economy.

The induced impact can be found by (Second Column of Table 14) – (Second Column of Table 13). The largest induced impact tends to be on retail trade, educational and health care services, and state and local governments. These are the sectors where households spend the greatest share of their incomes.

Sector	Direct	I&I	Total	%
Ag/Mn/For	512	477	989	0.9%
Construction	-	2,185	2,185	2.0%
Manufacturing	-	570	570	0.5%
Hosp & Leisure	59,470	2,129	61,599	57.4%
Retail Trade	4,801	5,390	10,190	9.5%
WTrd/Trans	290	1,585	1,874	1.7%
Ut/Inf	3	761	764	0.7%
FIRE	-	4,764	4,764	4.4%
Ed/HC Services	382	6,713	7,095	6.6%
Other Services	719	8,526	9,246	8.6%
Government	2,178	5,942	8,120	7.6%
Total	68,355	39,043	107,398	100.0%

Table 15: Direct, Indirect and Induced Employment Supported by Sales Outside of New Hampshire and Other Income Flows

Sector	Direct	I & I	Total	%
Manufacturing	61,890	99,462	161,351	19.6%
Travel/Tour*	61,519	26,579	88,098	10.7%
WTrd/Tran	24,283	47,976	72,259	8.8%
Ed/HC/SServ	35,467	22,889	58,356	7.1%
OthServices	32,185	21,881	54,066	6.6%
Retail Trade	24,977	28,311	53,288	6.5%
Construction	22,920	20,767	43,688	5.3%
Ut/Inf	6,861	16,846	23,707	2.9%
FIRE	6,462	9,215	15,678	1.9%
Ag/Mn/For	2,868	1,601	4,469	0.5%
Subtotal	279,432	295,527	574,959	70.0%
Govt Programs	21,160	86,392	107,551	13.1%
Investments		95,507	95,507	11.6%
Out-Commuters	-	43,711	43,711	5.3%
Total	300,592	521,137	821,729	100%

The direct, indirect and induced jobs supported by sales made to out-of-state residents for each industry has been estimated here. In other words, this table does not include sales made to in-state residents.

(Direct Column) = (Export Column of Table 10) – (Direct Column of Table 14) * (Share of Sales made to out-of-state travelers)

Govt. Programs represent those jobs supported by the federal government (through grants to state and local governments, federal employment within the state, Social Security, Medicare, pensions for former federal employees, and the operation of federal facilities in the state).
This table also includes out-of-state investment earning and salaries and wages earned by those who commute to work outside the state.

Table 16: Direct, Indirect and Induced Share of Gross State Product Supported by Sales Outside of New Hampshire and Other Income Flows

The direct, indirect and induced contribution to GDP of sales made to out-of-state residents for each industry has been estimated here. In other words, this table does not include sales made to in-state residents.

(Direct Column) = (Export Column of Table 9) – (Direct Column of Table 12) * (Share of Sales made to out-of-state travelers)

Govt. Programs represent those jobs supported by the federal government (through grants to state and local governments, federal employment, Social Security, Medicare, pensions for former federal employees, and the operation of federal facilities in the state).
This table also includes out-of-state investment earning and salaries and wages earned by those who commute to work outside the state.

Sector	Direct	I & I	Total	%
Manufacturing	6,556	9,006	15,562	24.3%
OthServices	1,983	4,219	6,202	9.7%
Ed/HC/SServ	2,043	3,693	5,735	9.0%
WTrd/Tran	2,560	2,035	4,595	7.2%
Travel/Tour*	2,173	1,914	4,087	6.4%
FIRE	1,245	1,819	3,064	4.8%
Ut/Inf	1,543	1,048	2,591	4.0%
Construction	897	1,477	2,374	3.7%
Retail Trade	1,083	1,005	2,089	3.3%
Ag/Mn/For	65	87	151	0.2%
Subtotal	20,148	24,738	43,924	68.6%
Govt Programs	1,469	6,723	8,192	12.8%
Investments		8,163	8,163	12.8%
Out-Commuters	-	3,736	3,736	5.8%
Total	21,617	43,360	64,015	100.0%

In millions of dollars

3. Traveler Counts and Spending by Travel Region and by Season

Table 17: Estimated Traveler Spending

Region	Sum '11	Fall '11	Win '11-12	Spr '12	Total	Percent
Gt N Wds	35.8	19.3	17.7	10.2	83.0	1.9%
White Mt	426.1	286.1	244.8	151.2	1,108.3	25.1%
Lakes	245.9	122.3	82.7	75.5	526.5	11.9%
Dart-LS	75.9	49.9	46.1	34.1	206.1	4.7%
Monad	92.5	57.3	46.1	49.9	245.8	5.6%
Mer Val	493.6	305.8	244.1	281.1	1,324.6	30.0%
Seacoast	399.1	202.0	143.9	177.7	922.6	20.9%
Total	1,768.9	1,042.8	825.4	779.8	4,416.8	100.0%
Percent	40.1%	23.6%	18.7%	17.7%	100.0%	

Spending here includes both overnight and day trip travelers. The northern regions of the state have higher proportions of total traveler spending than their share of total rooms and meals spending by travelers. This is because these regions have a higher proportion of their spending on recreational activities than the southern regions.

In millions of dollars

Table 18: Estimated Traveler Spending per Visitor Day

The higher the average spending per visitor day, the larger the proportion of overnight visitors.

The Great North Woods usually has the highest spending per visitor day while the Seacoast Region has the lowest average spending. The highest spending per visitor day is during the winter and the lowest is during the summer.

Region	Sum '11	Fall '11	Win '11-12	Spr '12	Average	Rank
Gt N Wds	92.86	104.49	103.48	98.37	98.23	1
White Mt	88.84	96.57	102.45	92.20	94.01	2
Lakes	82.31	85.59	95.23	87.09	85.57	4
Dart-LS	84.13	87.51	101.08	90.48	89.36	3
Monad	69.56	74.26	84.88	79.76	75.16	7
Mer Val	71.53	76.56	85.64	83.71	77.44	5
Seacoast	73.74	73.27	81.20	76.99	75.32	6
Average	77.87	82.30	91.20	84.03	82.23	

Table 19: Estimated Traveler Spending on Rooms and Meals

Region	Sum '11	Fall '11	Win '11-12	Spr '12	Total	Percent
Gt N Wds	9.7	4.6	4.0	2.3	20.6	1.1%
White Mt	153.7	91.2	77.0	58.4	380.2	19.8%
Lakes	97.1	49.4	36.4	39.9	222.8	11.6%
Dart-LS	29.3	19.9	18.1	17.0	84.3	4.4%
Monad	36.8	29.3	23.8	28.1	118.1	6.1%
Mer Val	191.9	156.9	139.1	153.7	641.6	33.4%
Seacoast	159.4	107.3	83.5	104.2	454.3	23.6%
Total	677.9	458.5	381.9	403.5	1,921.8	100.0%
Percent	35.3%	23.9%	19.9%	21.0%	100.0%	

Rooms and meals spending figures here are larger than those reported in Table 3 because these include estimated taxes and tips.

In millions of dollars, lodging subject to the state rooms tax.
State taxes and tips included in these amounts.

Table 20: Travel Spending for Lodging

Lodging spending in Table 20 includes payments for both lodging and meals purchased at resorts and hotels. The values also include taxes and tips.

All seven regions have their greatest number of overnight travelers during the summer.

Region	Sum '11	Fall '11	Win '11-12	Spr '12	Total	Percent
Gt N Wds	7.5	4.3	4.2	2.4	18.4	3.1%
White Mt	79.1	49.4	39.7	25.9	194.0	32.3%
Lakes	38.2	17.1	10.3	9.5	75.0	12.5%
Dart-LS	11.1	7.1	5.7	4.4	28.4	4.7%
Monad	8.9	7.8	5.4	5.9	27.9	4.6%
Mer Val	50.2	40.3	30.6	30.5	151.6	25.3%
Seacoast	46.4	26.5	13.6	18.2	104.7	17.5%
Total	241.4	152.4	109.4	96.8	600.1	100.0%
Percent	40.2%	25.4%	18.2%	16.1%	100.0%	

Spending shown in millions of dollars for lodging subject to the state's rooms and meals tax. Taxes and tips are included in these amounts.

Table 21: Paid Lodging Utilization

Region	Sum '11	Fall '11	Win '11-12	Spr '12	Ave.	Rank
Gt N Wds	100.0%	56.8%	55.8%	31.2%	61.0%	5
White Mt	100.0%	62.5%	50.2%	32.8%	61.4%	4
Lakes	100.0%	44.7%	26.9%	24.9%	49.1%	7
Dart-LS	100.0%	64.1%	51.6%	39.9%	63.9%	3
Monad	100.0%	87.6%	60.5%	66.3%	78.6%	1
Mer Val	100.0%	80.1%	60.9%	60.7%	75.4%	2
Seacoast	100.0%	57.2%	29.2%	39.2%	56.4%	6
Average	100.0%	64.9%	47.0%	41.8%	63.4%	

Spending shown in millions of dollars for lodging subject to the state's rooms and meals tax.
Lodging utilization ratios are much lower than usual for Great North Woods Region due to the closure of BALSAMS. The Grand Resort closed during fall 2011, which reduced the percentages of the Region's lodging spending during the fall, winter, and spring in that during summer.

This table provides a measure of lodging utilization. Lodging spending in each season is shown in terms of percentage of that in summer. It's assumed that each region operates at 100% capacity during summer and room rates stay the same throughout the year. It's further assumed that each facility/room rented in summer would also be available at other seasons of the year, if there were enough demand.

Promotional activities to attract multi-day conferences, meetings and training sessions as well as recreational travelers during fall, winter and spring seasons should continue as a high priority activity.

Table 22: Regional Share of All Paid Overnight Lodging by Season

Table 22 shows the region's percentage share of seasonal total spending on lodging, including campgrounds.

In general, the summer overnight traveler is most attracted to lakes; the winter traveler is attracted to regions with most of the state's ski areas; and business travelers.

Region	Sum '11	Fall '11	Win '11-12	Spr '12	Average	Percent
Gt N Wds	3.1%	2.8%	3.8%	2.4%	3.1%	2
White Mt	32.7%	32.4%	36.3%	26.8%	32.0%	1
Lakes	15.8%	11.2%	9.4%	9.8%	11.6%	7
Dart-LS	4.6%	4.7%	5.2%	4.6%	4.8%	4
Monad	3.7%	5.1%	4.9%	6.1%	4.9%	1
Mer Val	20.8%	26.4%	28.0%	31.5%	26.7%	2
Seacoast	19.2%	17.4%	12.4%	18.8%	17.0%	6
Total	100.0%	100.0%	100.0%	100.0%	100.0%	

Spending shown in millions of dollars for lodging subject to the state's rooms and meals tax.

Table 23: Estimated Number of Overnight Visitor Days

Region	Sum '11	Fall '11	Win '11-12	Spr '12	Total	Percent
Gt N Wds	0.35	0.16	0.16	0.10	0.77	2.5%
White Mt	4.49	2.44	1.78	1.33	10.04	32.4%
Lakes	2.56	1.04	0.55	0.69	4.84	15.6%
Dart-LS	0.62	0.48	0.26	0.23	1.60	5.2%
Monad	0.57	0.44	0.24	0.35	1.61	5.2%
Mer Val	2.28	1.76	1.33	1.38	6.74	21.7%
Seacoast	2.46	1.34	0.63	0.97	5.40	17.4%
Total	13.33	7.66	4.95	5.06	31.00	100.0%
Percent	43.0%	24.7%	16.0%	16.3%	100.0%	

This table shows the number of visitor days for all overnight travelers, including those who stay in second homes and with friends and relatives.

The numbers are shown in millions of days, and include all overnight visitors.

Table 24: Estimated Number of Overnight Visitor Trips

The number of visitor days has been divided by the average trip length by season to obtain the number of visitor trips.

Region	Sum '11	Fall '11	Win '11-12	Spr '12	Total	Percent
Gt N Wds	0.09	0.05	0.04	0.03	0.20	2.2%
White Mt	1.29	0.76	0.49	0.37	2.92	31.8%
Lakes	0.76	0.33	0.16	0.21	1.46	15.8%
Dart-LS	0.17	0.15	0.07	0.06	0.46	5.0%
Monad	0.15	0.16	0.07	0.09	0.47	5.2%
Mer Val	0.68	0.53	0.43	0.42	2.07	22.6%
Seacoast	0.62	0.47	0.22	0.30	1.61	17.5%
Total	3.78	2.45	1.47	1.49	9.19	100.0%
Percent	41.1%	26.7%	16.0%	16.2%	100%	

In millions of trips

Table 25: Estimated Number of Visitor Days

Region	Sum '11	Fall '11	Win '11-12	Spr '12	Total	Percent
Gt N Wds	0.39	0.18	0.17	0.10	0.85	1.6%
White Mt	4.80	2.96	2.39	1.64	11.79	21.9%
Lakes	2.99	1.43	0.87	0.87	6.15	11.5%
Dart-LS	0.90	0.57	0.46	0.38	2.31	4.3%
Monad	1.33	0.77	0.54	0.63	3.27	6.1%
Mer Val	6.90	3.99	2.85	3.36	17.10	31.8%
Seacoast	5.41	2.76	1.77	2.31	12.25	22.8%
Total	22.72	12.67	9.05	9.28	53.72	100.0%
Percent	42.3%	23.6%	16.8%	17.3%	100.0%	

This table includes both overnight and day trip travelers. Day trip travelers make up 41 percent of all visitor trips.

The number of visitor days equals the number of visitor trips * length of stay.

In millions of days

Table 26: Estimated Number of Visitor Trips

This table includes all travelers, including day trip travelers. Day trip travelers make up 73 percent of all visitor trips.

Visitors may be either day or overnight travelers who are visiting for purposes of recreation and business, regardless of the driving distance from home and the travel destination. Visitors also include New Hampshire residents visiting other parts of the state for purposes of recreation and business. Not included are those who are on a regularly scheduled shopping trip and seasonal residents, unless they are on a trip away from their residence.

Region	Sum '11	Fall '11	Win '11-12	Spr '12	Total	Percent
Gt N Wds	0.12	0.06	0.09	0.04	0.32	0.9%
White Mt	1.62	1.12	1.25	0.83	4.82	14.1%
Lakes	1.36	0.74	0.58	0.52	3.19	9.3%
Dart-LS	0.42	0.27	0.28	0.23	1.20	3.5%
Monad	1.03	0.54	0.43	0.50	2.50	7.3%
Mer Val	5.31	2.84	2.22	2.59	12.95	37.9%
Seacoast	3.82	2.11	1.46	1.84	9.24	27.0%
Total	13.69	7.68	6.30	6.55	34.22	100.0%
Percent	40.0%	22.4%	18.4%	19.1%	100.0%	

In millions of trips

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METHODOLOGY

An Introduction to the FY 2010 Input-Output Tables

The input-output tables describe the economy of the state of New Hampshire. There are two pages of tables for the state - a purchasing and sales table, Table 9 and an employment table, Table 10. The North American Industrial Classification System (NAICS) is used in this report. All of the federal agency reports on which these input–output tables are based use this system as do the reports from NHDES. The NAICS reports combine restaurants, accommodations and recreational (attractions) businesses into one industry sector, “Hospitality and Leisure.”

The state's economy has been divided up into ten industrial sectors, plus government, in this report, with the selection of these sectors providing the opportunity to focus on the tourist and travel industry. The label for each industrial sector is abbreviated in the table. A more complete explanation is provided here. The first industry, "Ag/For/Min", includes: agriculture, forestry, commercial fishing and mining. The second industry includes all construction. The third industry includes all manufacturing. The fourth sector, "Hospitality and Leisure", includes eating and drinking places, lodging, and amusements and recreation services.

The fifth sector includes all of retail trade. The sixth sector is "WTrd/Tran" which includes wholesale trade and transportation services. The seventh sector is “Ut/Inf” includes telecommunications, public utilities, and publishing. The eighth sector is "FIRE" which stands for finance, insurance and real estate services. The ninth sector, "Ed/HC Services” includes all educational and health care services including public hospitals, nursing homes, colleges and universities (but not local school districts) and social services organizations. The tenth sector includes all of the other services (except those listed above). The eleventh sector is federal (within NH only), state and local governments and includes public schools (K-12). The other parts of the table include household income and expenses, exports and federal taxes paid, imports and federal government payments received.

The information used to create each of these tables is obtained from a variety of sources, but especially the 2010 national (RIMS II) input-output table prepared by the U.S. Bureau of Economic Analysis (BEA). This national table has been modified by information specific to New Hampshire from the 2007 U.S. Census of Business, household income and self-employed information from BEA, household spending from the Bureau of Labor Statistics, employment data from the N.H. Department of Employment Security and restaurant and lodging tax collections from the N.H. Department of Revenue Administration. Information on tourist and traveler spending was obtained from visitor surveys conducted by the Institute for New Hampshire Studies for FY 2012. The model also incorporates the impact of interstate commuting patterns, out-of-state investment earnings and federal government collections and payments as reported by the BEA.

The table on each page shows the estimated transactions between the industry or activity listed on the side of the table with the industry or activity listed at the top of the table in either millions of dollars (Table 9) or the number of jobs (Table 10). This table is called the "transactions matrix". Also shown in this table is the value of each transaction or employment as a percentage of the total shown at the bottom of that column. The sales of each industry are shown in the rows, as are rows that show net household income and imports. The purchases of each industry are shown down the columns, as are columns for household purchases and exports.

For example, in the first table on the State Industry Purchasing and Sales page, "Retail Trade" establishments located within New Hampshire purchased 81 million dollars’ worth of goods and services from the state's agriculture, forestry, fishing and mining sector and this was 0.3 percent of all purchases made by the Retail Trade sector. The largest purchases made by Retail Trade were: imported goods (and services) from out-of-state (53.8 %); payments to households in the form of wages, salaries and profits (14.1 %); and the purchase within New Hampshire of wholesale goods and transportation services from the Wholesale Trade and Transportation sector (12.0 %).

Table 10 expresses these dollar transactions in terms of jobs. Given that each industry has a different ratio of sales/purchases to employment, the percentage figure shown for an employment transaction on the second table may be quite different from the sales transaction percentage shown for the same space (or cell) in the first table.

The impact of adding in local household earnings and spending (the induced economic effect) will approximately double the value of the sales multiplier when comparing the next to last row (the indirect multiplier) with the bottom row (the indirect and induced multiplier) in Table 9. The impact of adding households is not as strong on increasing employment, as can be seen when comparing the two bottom rows in Table 10. For example, the agriculture, mining and forestry sector has a state-wide direct and indirect sales multiplier of 1.63 and a direct, indirect and induced sales multiplier of 2.83. The state-wide employment multipliers state-wide for this same sector respectively are 1.36 and 1.71.

The ratio between the indirect and the indirect plus induced multipliers for each economic sector shows the importance of household wages and salaries as a percentage of total sales for this industrial sector and the impact of this household spending when it circulates through the state's economy. When the multipliers for the different industrial sectors are compared with each other, a dollar in new out-of-state sales by the hospitality and leisure sector results in a relatively large amount of total dollars ($3.43) circulating through the state's economy, as shown on the bottom line of Table 9. Over the last decade the multipliers for most of the state’s industries have decreased, reflecting the increasing integration of the state’s economy into the national and global economies.

As discussed in the previous section of this report on the travel and tourism industry in New Hampshire, tourist and traveler spending is not confined to just the hospitality and leisure industrial sector. Traveler surveys by the Institute for New Hampshire Studies were modified by state sales and employment data for FY 2012 to estimate total purchases by tourists and travelers and their distribution across the ten industrial sectors.

Model to apportion County Data to the Travel Region

There are ten counties and seven travel regions in New Hampshire. Almost all economic information published by the state and federal governments is available only at the county and state-wide levels. However, each travel region includes a portion of at least one county. Therefore, a method was needed to allocate those counties which are in more than one region based on appropriate information at the town level. The method employed to apportion these counties was to use the 2000 report from the N.H. Department of Employment Security (NHDES) which gave covered employment for restaurants and lodging establishments for the seven travel regions. It was assumed that rooms and meals spending is proportional to restaurant and lodging employment within each county as it is allocated among the travel regions of which that county is a part. Recently released 2007 US Census of Business data and 2008 BEA employee earnings data for restaurant and lodging establishments at the county level was used to redistribute the NHDRA rooms and meals tax collection data among the counties and travel regions for FY 2008, FY 2009 and FY 2010.

Comparing the spending for lodging with the amount spent by travelers for meals enables one to estimate the number of visitor days by over-night travelers and by day trip travelers at the county level by season. This estimate is possible as detailed over-night and day trip budgets have been calculated based on Institute for New Hampshire Studies' surveys of travelers conducted during 2004 and 2010. These surveys also provide information as to the kind of lodging used. Total spending per visitor day and type of overnight accommodation was also available from the TIAA for 1994, 2001 and 2004/5. The TIAA information shows that almost one-half of over-night visitors during each season stay in accommodations which do not collect State rooms and meals taxes as they are not charged for the lodging or they stay in campgrounds, which was subject to these state taxes during only part of FY 2010.

This county-level spending by those paying for overnight accommodations, campers, non-paid overnight accommodations and day trip travelers are then allocated to the seven travel regions. The lodging portion of the rooms and meals tax is used to calculate the county and region for the overnight visitors who pay for accommodations. Campers were allocated among the regions using occupancy data from the New Hampshire Campground Owners Association. The 2000 number of occupied (staying with friends and relatives) and seasonal/occasional use housing units (second homes and condos) from the 2000 U.S. Census of Population and Housing were used to project where overnight travelers who do not pay for lodging stay by county and region. Meals spending for these three groups were calculated for each county and region and then subtracted from estimated meals sales to all travelers, leaving a balance of meals sold to those on day trips. This balance was then used to calculate the number of day trips.

Definition of Visitors

Visitors may be either day or overnight travelers who are on a trip for purposes of recreation, business, and visiting family and friends. Visitors also include New Hampshire residents visiting other parts of the state away from their town of residence. Not included are those who are on a regularly scheduled shopping trip and seasonal residents, unless they are on a trip away from their town of residence.

Number of Visitors By Region and Season

The first step in calculating the total number of visitors and trips state-wide is to determine the number of visitor days by region and by season. The information necessary to do this was obtained from visitor surveys for each season conducted by the U.S. Travel Data Center and by the Institute for New Hampshire Studies as well as rooms and meals tax collections, N.H. Department of Transportation vehicle counts and regional housing and camping data for each travel region by season.

The information used in this calculation of spending per visitor day includes: type of accommodation, length of stay and spending for a variety of goods and services. This provides a daily budget for each season for: paid lodging by overnight traveler, non-paid lodging by overnight traveler and the daytripper. The allocation of each of these types of travelers to each region is based on: regional rooms and meals tax receipts and regional lodging mix. This permits the estimate of the total number of visitor days by type of traveler and visitor spending for each region for each season. From the information on length of stay by type of visitor, the number of visitor trips for each type of visitor can then be calculated for each season.