

2023 NEW HAMPSHIRE OUTDOOR INDUSTRY INVENTORY SUMMARY REPORT



ABOUT THIS REPORT

In 2022, recognizing the need for a deeper understanding of the state's outdoor industry, the New Hampshire Office of Outdoor Recreation Industry Development (ORID) commissioned a grant-funded inventory of the state's outdoor recreation businesses, organizations, and assets. This report includes the overall findings of the study as well as more detailed breakdowns of selected outdoor recreation activities.

Acknowledgments

This report would not have been possible without the contributions of numerous individuals around the state who shared data and information, participated in focus groups and phone calls, and provided guidance to the process. This includes business owners, economic development specialists, non-profit staff and volunteers, recreation managers, municipal and Regional Planning Commission representatives, university faculty and staff, and staff from various state agencies. We offer a special thanks to the team at Granite Outdoor Alliance for their support throughout the process.

Project Team



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EXECUTIVE SUMMARY

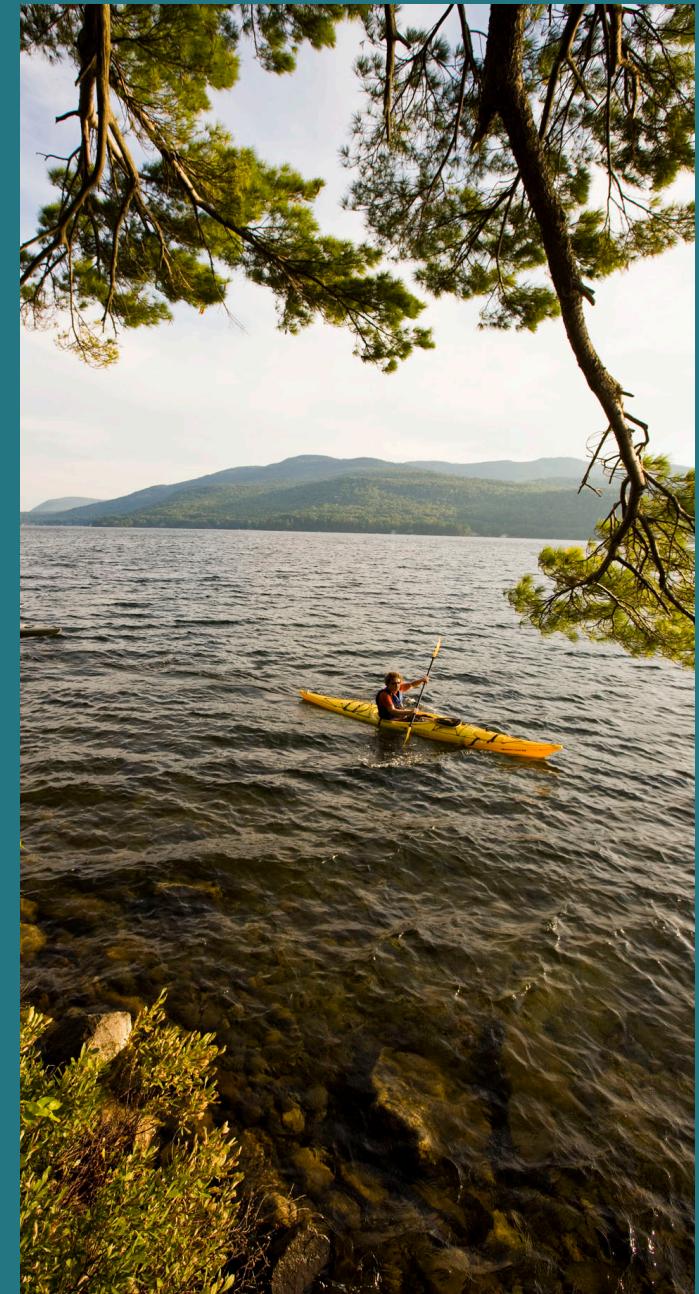
Top-Tier Recreational Assets and Experiences

“You can do it all” in New Hampshire! **For a small state, New Hampshire has a nearly-unparalleled range of outdoor recreation opportunities** - from forests that support a variety of trail-based activities and hunting opportunities, to lakes, rivers, and coastline for fishing, boating, and surfing, to rugged peaks that are destinations for hikers, skiers, and climbers. The state’s tradition of recreation on private lands support significant recreational opportunities in addition to those available on public lands.

Outdoor Recreation Means Business in New Hampshire

Outdoor recreation activities in New Hampshire support a **highly-diversified business mix** across the state. There are private businesses directly involved in retail sales and service of outdoor recreation gear, fee-based recreation providers (e.g., ski resorts and campgrounds), gear manufacturers, and a variety of business-to-business services. This includes regional clusters of business activity (surfing shops along the Seacoast, OHRV rentals in Coos County, marinas in the Lakes Region), as well as businesses such as bike shops and hunting outfitters that are prevalent throughout most regions of the state.

Individual studies of the economic impact of outdoor recreation activities demonstrate how **outdoor recreation supports New Hampshire's broader economy** as well. A 2019 study found that New Hampshire's ski areas support nearly 7,500 direct and indirect jobs, including thousands of jobs in hospitality and hundreds of jobs in real estate. Other studies of hunting, fishing, downhill skiing and riding, bicycle tourism, snowmobiling, and motorized boating have demonstrated significant direct and indirect economic impacts as well (see p. 12 - 13 for a full breakdown).



EXECUTIVE SUMMARY

Outdoor Recreation Partners Make it Happen

New Hampshire's premier outdoor recreation assets are the foundation of the state's outdoor industry. These lands, waters, trails, and facilities (and their recreational use) are stewarded by a **diverse patchwork of public, non-profit, and private entities**. Management of outdoor recreation in New Hampshire is uniquely collaborative, with significant amounts of recreation activity occurring on private or locally-managed public lands, in addition to lands managed by federal and state agencies.

Nearly 250 New Hampshire-based non-profit organizations and clubs fill the roles often played by public land managers in other regions of the country. Through these partnerships, New Hampshire is able to offer an enviable array of outdoor recreation opportunities for a relatively small state, underpinning the state's outdoor industry.

Outdoor Industry Strengths & Advantages

- Diversity and quality of outdoor recreation opportunities
- A tradition of recreational access on public and private lands
- Local, regional, and statewide collaboration
- New Hampshire is “on the map” for its recreational offerings



Outdoor Industry Threats & Opportunities

- Reliance on a declining pool of volunteers
- Workforce challenges
- Changes in climate and habitat
- High demand for existing recreation funding sources
- Visitor use management challenges
- Increased insurance costs
- Lack of welcoming and diversity in the outdoors
- Infrastructure needs
- Limitations of recreational access on private lands

NEW HAMPSHIRE'S OFFICE OF OUTDOOR RECREATION INDUSTRY DEVELOPMENT

Leveraging Outdoor Resources to Drive Economic Development

In 2019, recognizing the economic importance of the state's outdoor industry, the New Hampshire legislature created the state's Office of Outdoor Recreation Industry Development (ORID). The first Director of ORID was hired in 2021; this remains the only staffed position within the office.

Strategically positioned within the Department of Business and Economic Affairs (BEA), ORID works with state and industry partners, and coordinates outdoor recreation policy, management and promotion among state and federal agencies and local governments. In support of New Hampshire's diverse outdoor industry, ORID promotes sustainable land stewardship and developing long-term economic development opportunities through strategic planning for outdoor recreational amenities, benefits, assets, and partners.

Joining a Nationwide Movement

The establishment of ORID in 2019 follows a nationwide trend of increased state-level support for outdoor recreation. In 2022, New Hampshire joined the **Confluence of States**, a collaborative of all 16 statewide outdoor recreation offices in the United States. All member states of Confluence have signed on to the **Confluence Accords** - a set of four common principles for guiding state-level support and investment in outdoor recreation:

- >> **Conservation & Stewardship**
- >> **Education & Workforce Training**
- >> **Economic Development**
- >> **Public Health & Wellness**



CONFLUENCE
OF STATES

Partnering with the Private Sector



ORID has a private sector counterpart in the Granite Outdoor Alliance (GOA). GOA was founded in 2020 - one year after the establishment of ORID. GOA is a membership-based trade group representing the New Hampshire outdoor recreation industry. GOA's members include outdoor recreation businesses, non-profits, academics, and economic development organizations.

Together, ORID and GOA support public and private sector collaboration in support of the state's outdoor recreation industry.

NEW HAMPSHIRE'S OUTDOOR RECREATION ASSETS

"You can do it all" in New Hampshire! For a small state, New Hampshire has a **nearly-unparalleled range of outdoor recreation opportunities** - from forests that support a variety of trail-based activities and hunting opportunities, to lakes, rivers, and coastline for fishing, boating, and surfing, to rugged peaks that are destinations for hikers, skiers, and climbers.

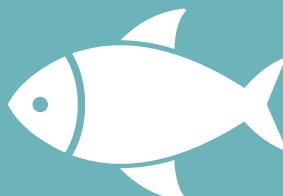
By the Numbers

over
4,000
mapped miles
of publicly-
accessible trails
for hiking



18 miles of ocean
coastline
with 13 public
beaches

over
300
streams
stocked with
trout annually



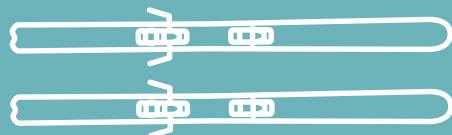
4

lift-served
mountain bike
parks

over
70
mountain bike
trail networks



22 alpine skiing &
riding areas



380
miles of rail
trails



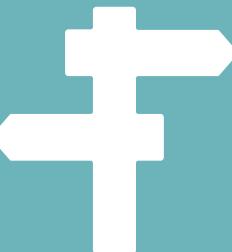
over
1,300 lakes &
ponds;
over **10,000**
miles of rivers & streams



over
1,200
miles of OHRV trails



200
campgrounds totaling
nearly 18,000 campsites



over
7,000
miles of publicly-accessible
snowmobile trails



DEFINING NEW HAMPSHIRE'S OUTDOOR INDUSTRY

According to the US Bureau of Economic Affairs, the outdoor industry in New Hampshire is directly responsible for over 30,000 jobs, \$1.5 billion in wages and salaries, and a total economic contribution of \$3.3 billion to the State's economy. **More broadly, outdoor recreation in New Hampshire contributes to a quality of life from which all residents, businesses, and visitors can benefit.**

Outdoor Recreation

"Outdoor recreation" in New Hampshire refers to outdoor activities undertaken for pleasure and wellbeing, often in a natural setting. These activities are enhanced by the state's natural beauty, clean air, and sparkling waters, and typically involve some level of physical exertion.

Outdoor Industry

The outdoor industry in New Hampshire refers to the economic activity resulting from participation in outdoor recreation activities and events, including:

- Consumer spending on travel, hospitality, and retail goods
- Manufacture and sale of outdoor recreation gear
- Associated services, such as outfitting, guiding, and gear repair
- Business-to-business services
- Non-profit and public sector employment
- Fee-based outdoor recreation activities and events (e.g., ski resorts)



OUTDOOR RECREATION MEANS BUSINESS IN NH

Outdoor recreation in New Hampshire directly supports business activity through multiple avenues. A variety of retail and service businesses provide outdoor gear sales, rentals, and repair services. Fee-based recreation providers offer recreational experiences ranging from downhill skiing and riding to camping, and an emerging array of gear manufacturers, distributors, and business-to-business services forms another key sector.

Key Takeaways

Outdoor recreation activities in New Hampshire support a highly-diversified business mix across the state. This includes regional clusters of business activity (surfing shops along the Seacoast, OHRV rentals in Coos County, marinas in the Lakes Region), as well as businesses such as bike shops and hunting outfitters that are prevalent throughout most regions of the state.

Outdoor recreation supports local business. Nearly 80% of outdoor recreation retail and service businesses in New Hampshire are small businesses with less than three locations.

Fee-based recreation providers, such as ski areas, campgrounds, and horse stables, serve a dual purpose for the outdoor industry by providing outdoor recreation experiences and direct employment.



Collaborative Economic Development Region (CEDR) Profiles

In 2021 the NH Department of Business and Economic Affairs established four Collaborative Economic Development Regions (CEDRs) covering different areas of the state to coordinate on local and regional economic development priorities and policies. CEDRs consists of municipal economic development officials; chamber officials, leadership and staff from regional planning commissions and economic development corporations, higher education leadership, elected officials, and representatives of the business community.

NORTHERN CEDR

COUNTIES: Coos, Grafton, Carroll, Belknap

POPULATION: 236,198 (2020)

NOTABLE OUTDOOR RECREATION DESTINATIONS: White Mountain National Forest, Mount Washington State Park, Lakes Region, Jericho Lake State Park, Appalachian National Scenic Trail, Major Ski Areas, Upper Connecticut River, Pittsburg Snowmobile Trail System

REGIONAL OUTDOOR RECREATION BUSINESS SUMMARY:

- 231 retail, service, and/or rental businesses (84% local)
- 179 fee-based for-profit recreation providers
- 106 non-profit organizations

NORTHERN CEDR BUSINESS CLUSTERS:

- 100% of whitewater outfitters and guides
- 100% of OHV rental businesses
- 92% of snowmobile rental businesses
- 78% of motorized boat rentals; 45% of retail businesses
- 72% of mountain bike rental businesses
- 72% of ski areas; 58% of ski rentals
- 56% of for-profit campgrounds

Regional Cluster =
more than 50% of
businesses in NH are
located in this region



Collaborative Economic Development Region (CEDR) Profiles

CENTRAL-SOUTH CEDR

COUNTIES: Merrimack, Hillsborough

POPULATION: 576,745 (2020)

NOTABLE OUTDOOR RECREATION DESTINATIONS: Bear Brook State Park, Highland Bike Park, Lake Sunapee, Mount Sunapee Resort, Mill City Park, Northern Rail Trail, Winnipesaukee River, Merrimack River

REGIONAL OUTDOOR RECREATION BUSINESS SUMMARY:

- 190 retail, service, and/or rental businesses (74% local)
- 69 fee-based for-profit recreation providers`
- 42 non-profit organizations

SOUTHWEST CEDR

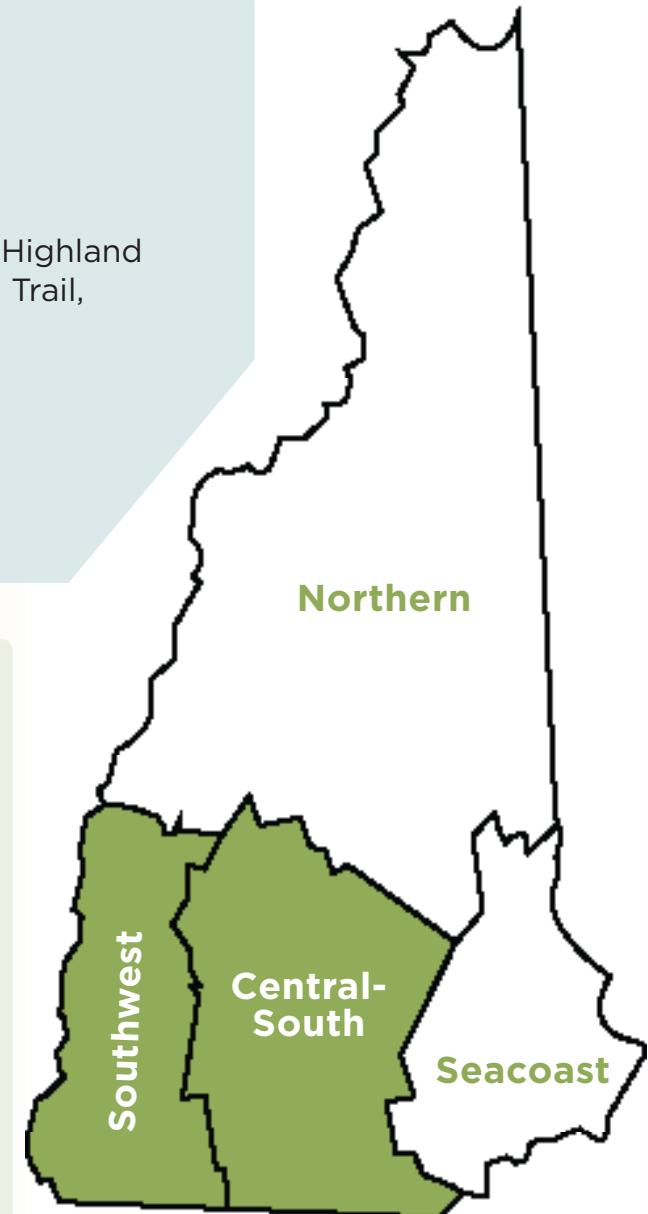
COUNTIES: Cheshire, Sullivan

POPULATION: 119,521 (2020)

NOTABLE OUTDOOR RECREATION DESTINATIONS: Monadnock State Park, Pisgah State Park, Pllsby State Park, Lake Sunapee, Sullivan County ATV Club Trails, Lower Connecticut River, Cheshire Rail Trail

REGIONAL OUTDOOR RECREATION BUSINESS SUMMARY:

- 53 retail, service, and/or rental businesses (74% local)
- 27 fee-based for-profit recreation providers`
- 26 non-profit organizations



Collaborative Economic Development Region (CEDR) Profiles

SEACOAST CEDR

COUNTIES: Strafford, Rockingham

POPULATION: 445,605 (2020)

NOTABLE OUTDOOR RECREATION DESTINATIONS: Hampton Beach State Park, Jenness Beach State Park, Pawtuckaway State Park, Great Bay National Wildlife Refuge, Moose Mountains Reserve, Salmon Falls River, Piscataqua River, Rockingham Rail Trail

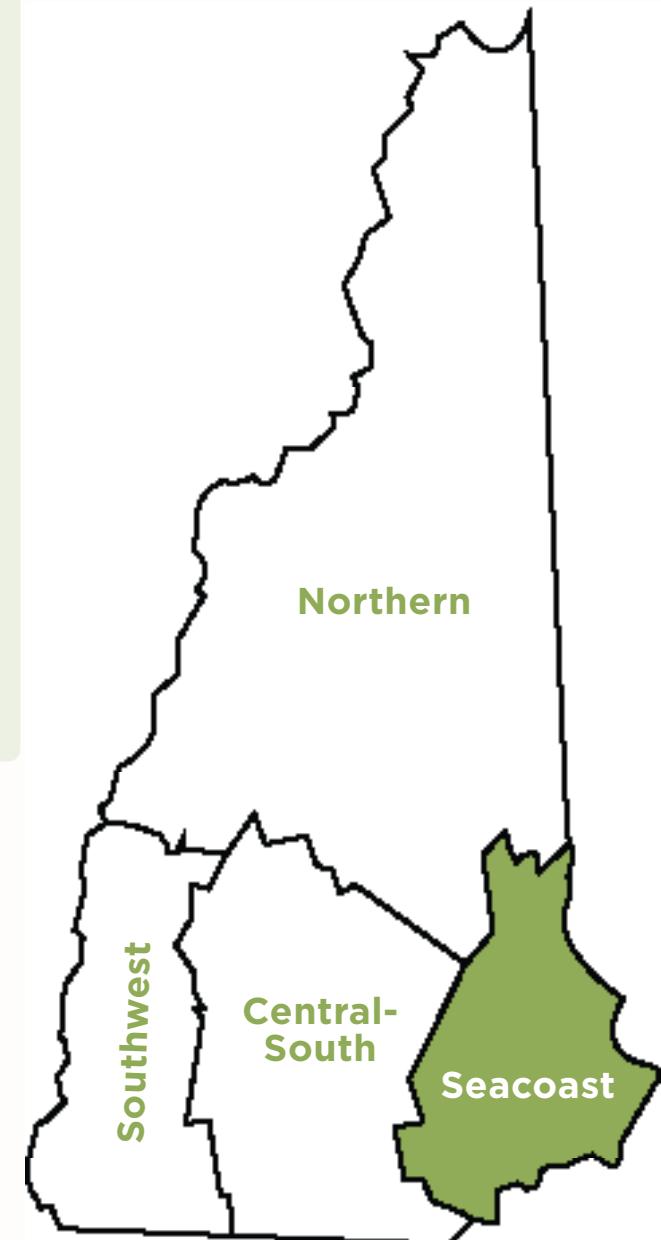
REGIONAL OUTDOOR RECREATION BUSINESS SUMMARY:

- 151 retail, service, and/or rental businesses (75% local)
- 76 fee-based for-profit recreation providers
- 25 non-profit organizations

SEACOAST REGION BUSINESS CLUSTERS:

- 100% of surfing retail and rental businesses

Regional Cluster =
more than 50% of
businesses in NH are
located in this region



Economic Impact of Outdoor Recreation Activities

There have been a variety of studies in recent years to determine the economic contributions of different outdoor recreation activities in New Hampshire. **These studies are conducted by independent agencies, universities, industry organizations, and/or economic consultants - not the State of New Hampshire.** Key findings from these studies are summarized below.

BICYCLE SHOPS¹



REPORT YEAR: 2020

DIRECT JOBS SUPPORTED: 200

DIRECT SALES: \$30 million

BICYCLE TOURISM¹

YEAR: 2020

DIRECT ECONOMIC IMPACT: \$28 million/year

DIRECT JOBS SUPPORTED: 269

DIRECT + INDIRECT ECONOMIC IMPACT: \$43 million/year

DIRECT + INDIRECT JOBS SUPPORTED: 400

FISHING²



REPORT YEAR: 2019

DIRECT ECONOMIC IMPACT: \$215 million/year total (freshwater fishing only). Trout fishing accounts for \$150 million/year of this impact.

HUNTING³



REPORT YEAR: 2014

DIRECT ECONOMIC IMPACT: \$61 million/year

DIRECT JOBS SUPPORTED: 923

Economic Impact Glossary

- **DIRECT Economic Impact:** Total activity-related spending by participants (e.g., recreational fees, food, lodging, transportation costs).
- **INDIRECT Economic Impact:** Total business-to-business/supply chain purchases resulting from direct spending.
- **INDUCED Economic Impact:** Household spending of income generated from direct & indirect spending.

Economic Impact of Outdoor Recreation Activities (continued)

MOTORIZED BOATING⁴

REPORT YEAR: 2022

DIRECT + INDIRECT + INDUCED ECONOMIC IMPACT: \$1.2 billion/year

DIRECT + INDIRECT JOBS SUPPORTED: 6,800

OHRV⁵

REPORT YEAR: 2021

DIRECT ECONOMIC IMPACT: \$165 million/year

DIRECT JOBS SUPPORTED: 1,689

DIRECT + INDIRECT ECONOMIC IMPACT: \$298 million/year

DIRECT + INDIRECT JOBS SUPPORTED: 2,488

Data Sources

^{1 2} New Hampshire DOT. *Statewide Pedestrian & Bicycle Transportation Plan and Economic Impact Study - Technical Memorandum #4: Economic Impact Analysis* (2020)

³ University of New Hampshire. *What Is Our Water Worth and What Does Our Water Cost?* (2019)

⁴ National Marine Manufacturers Association (2022)

⁵ New Hampshire Off Highway Vehicle Association/Plymouth State University. *Economic Study.* (2021)

⁶ New Hampshire Ski Areas Association/Plymouth State University. *Economic Contribution of the Ski Industry in New Hampshire.* (2019)

⁷ New Hampshire Snowmobilers Association/Plymouth State University. *The Economic Impact of Spending by Snowmobilers on New Hampshire's Economy.* (2011)

SKI AREAS⁶

REPORT YEAR: 2019

DIRECT ECONOMIC IMPACT: \$384 million/year

DIRECT + INDIRECT ECONOMIC IMPACT: \$508 million/year

DIRECT + INDIRECT JOBS SUPPORTED: 7,485

SNOWMOBILING⁷

REPORT YEAR: 2012

DIRECT ECONOMIC IMPACT: \$203 million/year

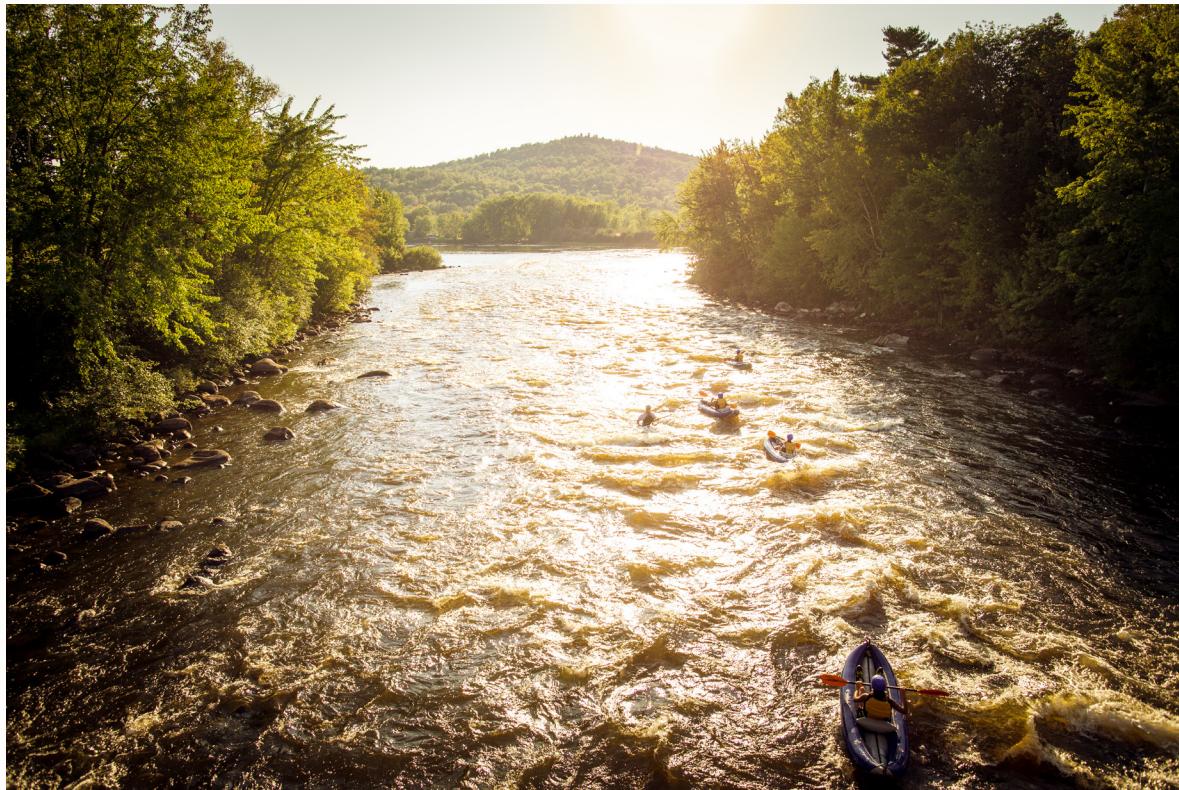
DIRECT JOBS SUPPORTED: 2,394

DIRECT + INDIRECT ECONOMIC IMPACT: \$298 million/year

DIRECT + INDIRECT JOBS SUPPORTED: 3,074

DIRECT + INDIRECT + INDUCED ECONOMIC IMPACT: \$586 million/year

OUTDOOR RECREATION PARTNERS MAKE IT HAPPEN



New Hampshire's premier outdoor recreation assets are the foundation of the state's outdoor industry. These lands, waters, trails, and facilities (and their recreational use) are stewarded by a **diverse patchwork of public, non-profit, and private entities**. Management of outdoor recreation in New Hampshire is uniquely collaborative, with significant amounts of recreation activity occurring on private or locally-managed public lands, in addition to lands managed federal and state agencies.

Non-profit organizations and clubs, local conservation commissions and land trusts, and other community partners fill the roles often played by large public land managers in other regions of the country. **Through these partnerships, New Hampshire is able to offer an enviable array of outdoor recreation opportunities for a relatively small state, underpinning the state's outdoor industry.**

Land Access

"With greater than 70% of New Hampshire's land under private ownership, the key to a quality hunting and fishing experience is the ability to access private lands. If we are to maintain New Hampshire hunting and fishing traditions, it is important to remember that access to private land is a privilege provided to us only through the generosity of the landowner. Treat the landowner as you would like to be treated, and treat their land as you would like yours to be treated."

New Hampshire Fish & Game

Non-Profit Partners

Trail Clubs and Organizations

Trails located on federal and state lands make up a relatively small percentage of the total trail mileage in New Hampshire. With most trails being located on private or locally-conserved lands, volunteer trail clubs and organizations provide a significant role building, maintaining, and stewarding trail-based recreation in the state. **There are approximately 140 trail clubs and organizations across New Hampshire that steward the state's trail systems.** These clubs and organizations also organize trail outings, serve as liaisons between landowners and trail users, and, in some cases, supporting trail building and maintenance on federal and state public lands as well. Snowmobiling, OHVing, mountain biking, hiking, Nordic skiing, and horseback riding are the activities with the most trail clubs across the state.

Conservation Organizations

Land trusts and other local and regional conservation organizations play a significant role in the delivery of outdoor recreation opportunities in New Hampshire. There are currently **33 land trusts** based in New Hampshire, as well as several national conservation organizations. Land trusts typically acquire lands for conservation purposes or work with private landowners to place conservation easements on their properties. Outdoor recreation opportunities vary on these conserved lands - some contain significant trail networks that are well-known to the public, while others may limit or restrict recreational activities for conservation purposes or privacy reasons.

Common Needs & Challenges for Non-Profits

New Hampshire relies heavily on non-profit partners to support outdoor recreation in the state. Many of these non-profit partners face similar challenges in delivering on their missions:

Staffing: non-profits operate on tight budgets, with funding primarily coming from donations and grants. This can make it difficult for non-profits to offer competitive wages.

Volunteers: non-profits and clubs rely heavily on volunteer support, and are entirely volunteer-run in some cases. Many organizations report that it is becoming increasingly difficult to recruit and retain volunteers.

Funding: non-profits and clubs are often reliant on specific funding sources such as grant programs and recurring donors. As outdoor recreation grows and costs inflate, there is increased competition for these funding sources. There is a need for greater coordination amongst organizations to make efficient use of available funding sources.

Non-Profit Partners

Adaptive Sports Organizations

Adaptive sports organizations help participants with disabilities enjoy the outdoors. In New Hampshire, these organizations support participation in a wide variety of outdoor recreation activities, such as downhill skiing, rock climbing, mountain biking, and kayaking.

There are at least six non-profit adaptive sports providers currently operating in the state. At least eleven ski areas have adaptive skiing and riding programs as well.

Search-and-Rescue Organizations

Volunteer search-and-rescue (SAR) organizations perform rescues of injured or lost recreationalists across the state. These organizations provide additional capacity for paid SAR teams from NH Fish & Game and White Mountain National Forest. **There are eight volunteer SAR organizations operating in New Hampshire, primarily in the greater White Mountains region.** Other non-profit outdoor organizations, such as the Appalachian Mountain Club and various outing clubs, assist with SAR efforts as well.

Environmental & Outdoor Education

There are a variety of non-profit organizations that provide educational services related to outdoor recreation and conservation. These organizations host educational camps and courses, partner with public and private schools, and lead recreational outings across the state. **There are at least 28 non-profit organizations in New Hampshire focused on environmental and outdoor education.**

"Public-private partnerships are central to how New Hampshire serves residents and visitors alike. Across our state's open spaces and waters, non-profit organizations provide outdoor experiences for all, steward natural resources, educate public audiences, participate as first responders alongside agency professionals, and generate thousands of hours of trail maintenance and restoration through both volunteer and staff contributions. For nearly 150 years, the non-profit AMC, as the oldest conservation and recreation organization in the United States, has been committed to this work through effective and long-standing partnerships here in New Hampshire. Growing outdoor visitation amidst visible climate impacts underscores the critical role non-profit organizations play in sustaining our outdoor recreation landscapes."

Chris Thayer, Appalachian Mountain Club



Non-Profit Partners

Economic Development Organizations

There are a variety of non-profit economic development organizations across the state. There are **ten regional development corporations** that support business development in their respective regions, as well as **44 local and regional chambers of commerce** that provide a variety of economic development and business support services. While these organizations vary in terms of their direct involvement with the outdoor industry, many are becoming increasingly involved in supporting the outdoor industry and outdoor recreation more broadly.

BIPOC Outdoor Organizations

There are a **variety of non-profit organizations that support increased participation in outdoor recreation from underrepresented populations** including Black, Indigenous, and People of Color (BIPOC). There are several such organizations based in New Hampshire, as well additional organizations based in Massachusetts that organize group outings in New Hampshire.

Business & Industry Associations

Non-profit industry associations provide coordination and advocacy for a variety of outdoor recreation businesses and non-profit organizations in New Hampshire. There are currently statewide associations for **ski areas, campgrounds, motorized boating, mountain biking, OHVing, snowmobiling, and land trusts** in New Hampshire, as well as the **Granite Outdoor Alliance**, a statewide membership-based organization of over 100 businesses that works to support the state's outdoor industry.

Outdoor recreation is an undeniable economic driver for the North Country and the Mt. Washington Valley. The mountains, trails, and rivers can speak for themselves. It's a lifestyle and what so many are drawn to – the quality of life. The Mt. Washington Valley is an area where you work-live-play-stay.

Michelle Cruz, Mount Washington Valley Chamber of Commerce

Government Partners

Federal Agencies

A variety of federal land management agencies support outdoor recreation in New Hampshire:

- **US Forest Service:** USFS manages the White Mountain National Forest (WMNF), which contains over 1,200 miles of trail, 23 campgrounds, and nearly all of the state's 4,000 peaks. USFS also owns and manages the entirety of the Appalachian National Scenic Trail corridor in New Hampshire.
- **US Fish and Wildlife Service:** USFWS manages six National Wildlife Refuges across New Hampshire. These refuges offer a varying outdoor recreation activities such as hunting, fishing, paddling, and hiking.
- **US Army Corps of Engineers:** USACE manages and maintains seven flood risk management dams and adjacent lands in southern and central New Hampshire, each of which provide outdoor recreation facilities ranging from trails to fishing and boating.



Government Partners

State Agencies & Offices

- **NH State Parks:** NHSP manages 71 state parks across all regions of the state, covering nearly 75,000 acres. State parks include ocean beaches, downhill ski areas, mountain summits, lakes, and other natural areas, with recreational offerings including hiking, hunting, fishing, skiing, OHRVing, surfing, and many others. NHSP also manages 13 Natural and Scenic Areas and 16 State Historic Sites. NHSP is self-funded through park user fees.
- **NH Bureau of Trails:** Located within NHSP, the Trails Bureau performs maintenance on state-owned trails and administers grant funding for trail construction and maintenance, such as the Grant-in-Aid program for OHRV and snowmobile trails.
- **NH Fish and Game:** NHFG provides a vast suite of services for outdoor recreation in New Hampshire, including enforcement of hunting, fishing, snowmobiling, and OHRV regulations, processing snowmobile and OHRV registrations, providing safety education courses, performing search-and-rescue missions, operating the state's fish hatcheries and fish stocking program, stocking game birds, and assisting with fish and wildlife habitat monitoring and improvement. NHFG is self-funded through license and registration fees, fines, and fundraising.
- **NH Department of Environmental Services:** NHDES administers environmental regulations that protect water quality and habitat. NHDES actively monitors water quality around the state and manages programs aimed at improving water quality and limiting the spread of invasive species that threaten the health of the state's waterbodies.
- **NH Division of Motor Vehicles:** NH DMV processes registrations for motorized boats.
- **NH State Police:** NHSP operates the state's Marine Patrol, which promotes boating safety by enforcing boating laws and administrative rules.
- **NH Department of Transportation:** In addition to maintaining state-owned road, bridge, and rail infrastructure, NHDOT owns most of the 27 state-owned rail trails in New Hampshire - a total of 338 miles. NHDOT also administers federal grant programs that can support recreational access improvements, such as multi-use biking and walking paths.





Government Partners

Regional Entities

- **Regional Planning Commissions:** New Hampshire's nine regional planning commissions provide a variety of support to the state's outdoor industry, such as recreational trails planning and mapping, coordinated economic development planning, assistance with grant applications, development of municipal Master Plans, and other local planning and technical assistance services.
- **Counties:** Many counties in New Hampshire have taken an active role in supporting outdoor recreation. For example, Sullivan County owns and maintains over 2,100 acres of conserved land with a variety of trails and is working to develop a County-wide trails plan, and Belknap County owns and operates Gunstock Mountain Resort.

Municipal Government

- **Parks and Recreation Departments:** In addition to traditional recreation programs (e.g., summer camps, sports leagues), many municipal parks and recreation departments take an active role in supporting outdoor recreation through organized outings, providing trails on municipally-owned lands, or partnering with local outdoor recreation organizations.
- **Conservation Commissions:** In addition to promoting conservation of local natural resources, many municipal conservation commissions actively support outdoor recreation by maintaining access and trails in town forests and taking on other outdoor recreation stewardship initiatives.
- **Economic Development Committees:** Municipal economic development committees are well-positioned to leverage local outdoor recreation assets to support business and workforce development in their communities.

Educational Institutions

Colleges & Universities

- **Coursework & Degrees:** New Hampshire's higher education institutions support outdoor recreation workforce development through various coursework and degree offerings. The [University of New Hampshire](#) (UNH) offers multiple Bachelor's and Master's degree programs through the Department of Recreation Management & Policy that support careers in recreation management and adaptive recreation support, as well as coursework in environmental and resource economics. [Plymouth State University](#) offers an Adventure Education degree program aimed at careers in outdoor recreation leadership, instruction, and administration.
- **Planning & Research:** UNH supports multiple research programs related to outdoor recreation and economy, including the [UNH Applied Recreation Research Collaborative](#) and the [UNH Extension Nature Economy](#) program. UNH also leads the development of the [New Hampshire Statewide Comprehensive Outdoor Recreation Plan](#) every five years. Plymouth State has completed a number of studies detailing the [economic impact of outdoor recreation activities](#) in New Hampshire, such as snowmobiling and downhill skiing and riding.
- **Outing Clubs and Programs:** Collegiate outing clubs support student participation in outdoor recreation, as well as activities such as trail maintenance and natural resource stewardship. The [Dartmouth Outing Club](#) (DOC) is the oldest and largest collegiate outing club in the country, with about one-quarter of the College's student population involved in the club. In addition to providing student-led recreational trips and programs, [DOC maintains a 50-mile stretch of the Appalachian Trail](#) and provides outdoor leadership and medical training to students.

Career & Leadership Development

- **Career & Technical Training:** Career and technical training programs support outdoor recreation workforce development as well as the development of needed technical support skills. In 2023, the Mount Washington Valley Career and Technical Center launched an [Outdoor Recreation training program for high school students](#) to support careers in the outdoor industry by teaching critically-needed skills. The program's initial offerings cover bicycle repair, swiftwater rescue certification, and wilderness first aid. The Hugh J. Gallen Career & Technical Center in Littleton features [Project Bike Tech](#), a two-year course that prepares students for careers in the bicycle industry.
- **Outdoor Leadership:** A variety of educational institutions and non-profits support leadership development through outdoor recreation. Adapt, a substance abuse prevention non-profit serving central and northern New Hampshire, offers multiple youth leadership academies focused on outdoor recreation activities.

OUTDOOR INDUSTRY STRENGTHS & ADVANTAGES

Diversity & Quality of Outdoor Recreation

For a small state, New Hampshire has an almost unparalleled array of outdoor recreation opportunities. There are few places that boast vast mountain peaks, pristine ocean beaches, and plentiful lakes and rivers all within a few hours of each other. **New Hampshire is a small state where “you can do it all”** - from world-class hiking, skiing, climbing, and mountaineering in the White Mountains to motorized adventures in the Great North Woods and Sullivan County, from surfing on the Seacoast to boating in the Lakes Region. Hunting and fishing opportunities abound in the state’s vast forests. In addition to major outdoor recreation destinations, local conservation organizations and private landowners provide a diversity of local outdoor recreation options within communities across the state.

A Tradition of Recreational Access

With over 70% of lands under private ownership, recreational access to private lands is both an honored tradition and a practical necessity in New Hampshire. Public access to outdoor recreation in New Hampshire is supported by critically-important state laws. These important state law provisions include:

- **Limited liability** for private landowners that permit recreational access on their lands.
- The state’s **Current Use law**, which provides tax incentives for conservation of private lands, as well as additional incentives for permitting recreational access.
- **Requiring there be public access** to most lakes, ponds, rivers, and streams that are over 10 acres in size.

Collaboration

With the relatively small amount of public land in New Hampshire, local and regional clubs, nonprofits, and local governing bodies are responsible for delivering a significant portion of outdoor recreation opportunities in the state. Many of these organizations rely significantly on volunteers - **leaning heavily on traditions of local public involvement and “do-it-yourself” attitudes in the state’s communities.**

As a small state, New Hampshire is well-suited for regional and statewide collaboration in the outdoor industry as well. Statewide outdoor industry associations play an important role in coordinating advocacy and fundraising activities for their respective business sectors. The emergence and impact of the **Granite Outdoor Alliance** in recent years is a testament to this collaborative power in New Hampshire - something that larger states often struggle with.

In addition to industry collaboration, there has been **fruitful partnerships between public officials**. A recent success story is the **Franconia Notch Hiker Shuttle**, which was started following a collaborative process between state agencies, National Forest staff, and local officials that aimed to stop overflow parking along I-93 in Franconia Notch State Park.

New Hampshire is “On the Map”

New Hampshire’s outdoor recreation offerings are generally **well-known to the public**, particularly within the Northeast. In addition to drawing in visitors to support the state’s tourism economy, the recognition of the state’s recreational offerings also supports **business recruitment efforts** and other economic development initiatives.

OUTDOOR INDUSTRY THREATS & OPPORTUNITY AREAS

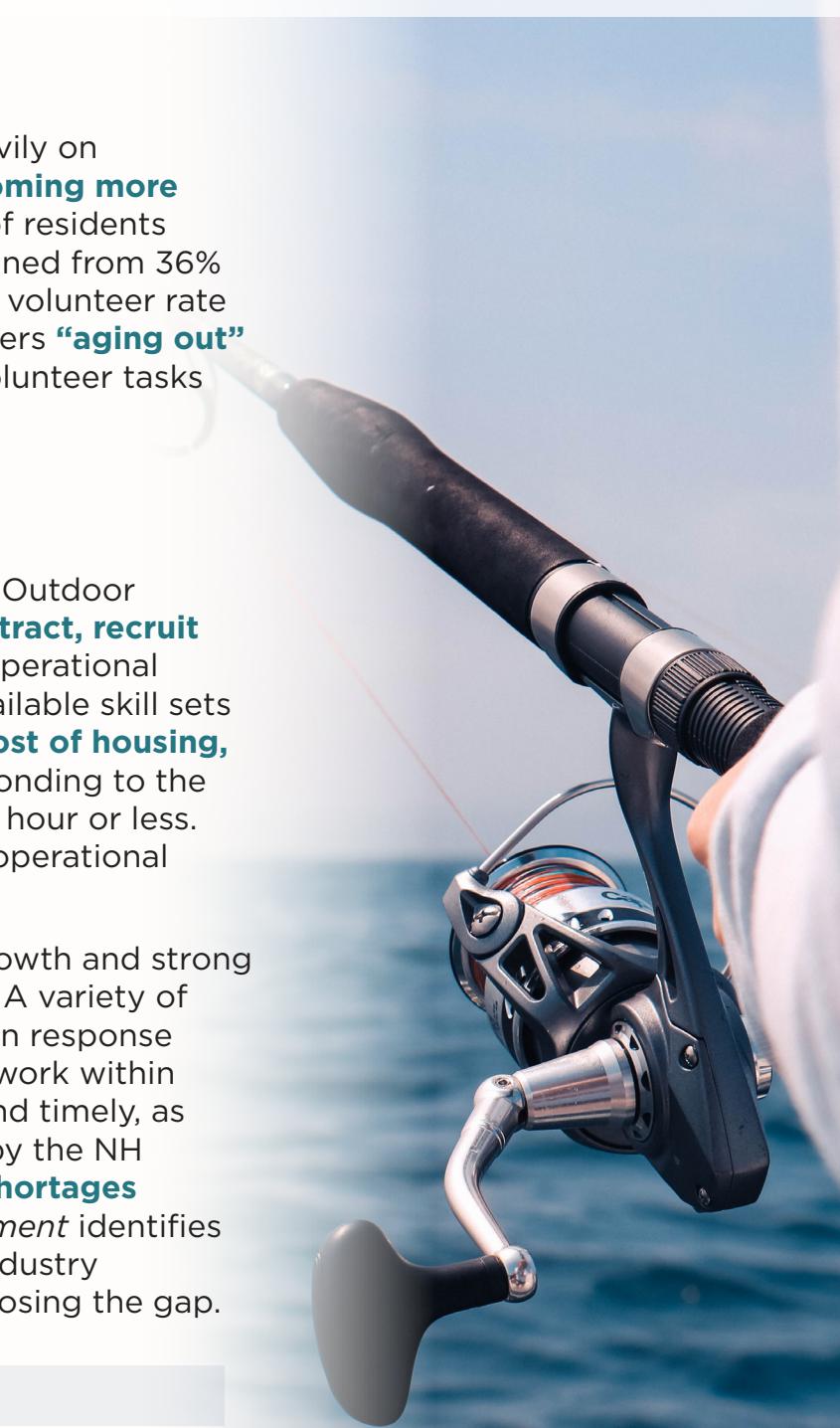
Availability of Volunteers

While local and regional clubs, non-profits, and governing bodies rely heavily on volunteers, **many report that volunteer recruitment and retention is becoming more difficult.** Statewide, the estimated volunteering rate (i.e., the percentage of residents who spent any time volunteering in the past year) in New Hampshire declined from 36% in 2017 to 28% in 2021, according to an AmeriCorps study. The nationwide volunteer rate fell from 30% to 23% during this time. There is also concern about volunteers **“aging out”** as the state’s population continues to increase in age, as some of these volunteer tasks require significant physical exertion.

Workforce Challenges

A 2022 *Outdoor Workforce Assessment Survey* conducted by the Granite Outdoor Alliance concluded that outdoor industry businesses are **“struggling to attract, recruit and retain qualified applicants and/or employees,”** with impacts to the operational capacity of businesses. Challenges include a gap between desired and available skill sets in the workforce, as well as **market barriers such as the availability and cost of housing, overall cost of living, and relatively low wages.** Amongst employers responding to the survey, nearly two-thirds (64%) were offering entry level wages of \$17 per hour or less. These challenges exacerbate employee retention issues, further straining operational capacity.

The survey found that outdoor industry employers generally anticipate growth and strong hiring practices over the next five years, despite the challenges identified. A variety of local **workforce development initiatives** have sprung up across the state in response to these challenges, including outdoor recreation industry training coursework within high schools and vocational programs. These initiatives are both crucial and timely, as the *2023 State of New Hampshire Workforce Assessment* commissioned by the NH BEA projects that New Hampshire will experience **significant workforce shortages** across dozens of major occupations between 2023 and 2032. The Assessment identifies workforce diversification, skill transfer, employee retention and training, industry collaboration, and attracting workers from other states as strategies for closing the gap.



Changes in Climate & Habitat

Observed changes in climate are already impacting the natural resources upon which outdoor recreation in New Hampshire depends. A Dartmouth College study found that the number of **severe precipitation events** in northern New England has increased by 50% since the 1990's, with implications for the erosion of recreational trails and the health of lakes, rivers, and fisheries. Recent **sea level rise** of up to one inch per year has impacted the viability of ocean beach-going and surfing along New Hampshire's Seacoast, with some beaches being almost fully submerged during high tides.

Monitoring from NHDES has identified **increases in surface water temperatures**, with implications for the health of trout fisheries and overall water quality for swimming and boating. NH Fish & Game lists a number of **inland and coastal habitats that are vulnerable to shifting and alteration** due to climate change, including salt marshes, spruce fir forests, and northern hardwood-conifer forests, with implications for the health of important game species for hunting.

Changes in climate have implications for climate-dependent winter recreation activities, such as skiing, snowmobiling, ice climbing, and ice fishing. UNH's *New Hampshire Climate Assessment 2021* notes **earlier recorded ice-out dates** for lakes and a **long-term decline in annual recorded snowpack** in New Hampshire, with the potential for "serious impact" to the state's ski industry and other winter activities. Anecdotally, ice climbing guides report that the annual ice climbing season has shrunk by at least one month in recent decades.

Habitat loss is another trend that is being monitored. When lands are developed or cleared, habitat is lost and the remaining habitats can change in impactful ways. The 2015 *New Hampshire Wildlife Action Plan* states that "**residential and commercial development is the most challenging issue for most of New Hampshire's wildlife and habitats**" and lays out 117 strategies for monitoring, managing, and improving species habitat.

Increasing Demand for Existing Funding Sources

Many local outdoor recreation organizations and clubs rely heavily on grant programs to fund operations, programs, maintenance, and stewardship projects. For example, snowmobile and OHRV trail clubs receive funding through the state's Grant-in-Aid program and the federal Recreational Trails Program. **With the increasing popularity of these activities, as well as the increased costs of goods and services related to trail maintenance due to inflation, the demand for these funding programs is high.** The funding levels available for these programs are periodically adjusted by legislative bodies, but in the interim, many clubs must find ways to do more with less.

Visitor Use Management

There are high levels of visitation to certain State Parks, Natural Forest destinations, motorized trails, and other recreation destinations. These land managers and trail clubs are often tasked with balancing the sustainable use of trails and natural resources, promoting enjoyable experiences and visitor safety, addressing transportation safety issues such as overflow parking, and limiting impacts to landowners and resident quality of life. **This work often strains staff and volunteer capacity. In some cases, adequate resources to address these challenges are lacking.** Many challenges persist at popular destinations.

Needed Infrastructure

Transportation infrastructure is critical for facilitating recreational access by residents and tourists. While the state is continually investing in its transportation system, there are several areas identified by outdoor recreation advocates and partners as being in need of improvement:

- Limited number of **public electric vehicle charging stations**;
- Lack of **bicycle-friendly infrastructure**;
- Trout habitat is impacted by **undersized or poorly-designed culverts** where roadways cross streams;
- **Parking capacity challenges**, particularly at popular hiking trailheads and trails used for horseback riding that lack space for trailers.

Additionally, many outdoor recreation activities rely directly on localized infrastructure for recreational access and safety. Additional infrastructure considerations raised by recreational stakeholders included:

- **Replacement costs of trail infrastructure**, such as bridges and culverts;
- Limited number of **adaptive equipment-friendly trails and facilities**;
- **Costs of maintenance equipment**, such as groomers;
- Replacing and upgrading **chairlift and snowmaking infrastructure**.

Lack of Diversity and Welcoming in the Outdoors

The 2019-2023 NH Statewide Comprehensive Outdoor Recreation Plan notes that “**understanding the barriers or constraints to recreation participation, such as perception of safety, income/age/ethnicity diversity, and language barriers, is vital as New Hampshire’s demographics continue to shift.**”

Representatives from BIPOC outdoor organizations operating in the state report that their participants often seek out their organizations due to **feeling unsure or unwelcome** on their own in outdoor spaces as well as a lack of BIPOC representation in outdoor recreation leadership roles.

Insurance Costs

Various businesses, outdoor recreation providers, non-profits, and clubs have noted that **increased insurance costs are a challenge to their operations**. This ranges from summer camp programs to volunteer trail building to necessary mechanical equipment, such as trail groomers. In some cases, insurance costs have led to organizations scaling back programming or significant impacts to business profits.



Limitations of Recreational Access on Private Land

New Hampshire's heavy reliance on private property owners that permit recreational access introduces additional recreation management challenges that are not present on public lands. Changes in private property ownership or property owner attitudes can result in the **closure of recreational trails and hunting access**. In some cases, these closures can cut off major portions of a trail system.

Local trail clubs and organizations are often proactive with managing landowner relations, and various state laws limit landowner liability and provide tax incentives for recreational access. However, the landowner still maintains the final say over recreational access.





THE ROAD AHEAD

New Hampshire's outdoor industry is built on a foundation of collaboration, tradition, stewardship, and world-class outdoor recreation offerings. By leaning in to these core values and assets, industry partners can navigate shared challenges while aiming towards the sustainable, long-term development of an outdoor industry that promotes economic well-being, quality of life, and environmental health.



**2023 NEW HAMPSHIRE
OUTDOOR INDUSTRY INVENTORY
CAMPING**

EXECUTIVE SUMMARY

There are approximately 200 campgrounds spread across New Hampshire, ranging from primitive car camping with minimal services to full-service RV and “glamping” resorts. These campgrounds play a key role in New Hampshire’s outdoor recreation industry by providing lower-cost overnight stays as well in addition to being recreational destinations themselves.

In addition to campgrounds, New Hampshire has many opportunities for overnight wilderness camping (see the Hiking summary for more information on overnight backpacking).

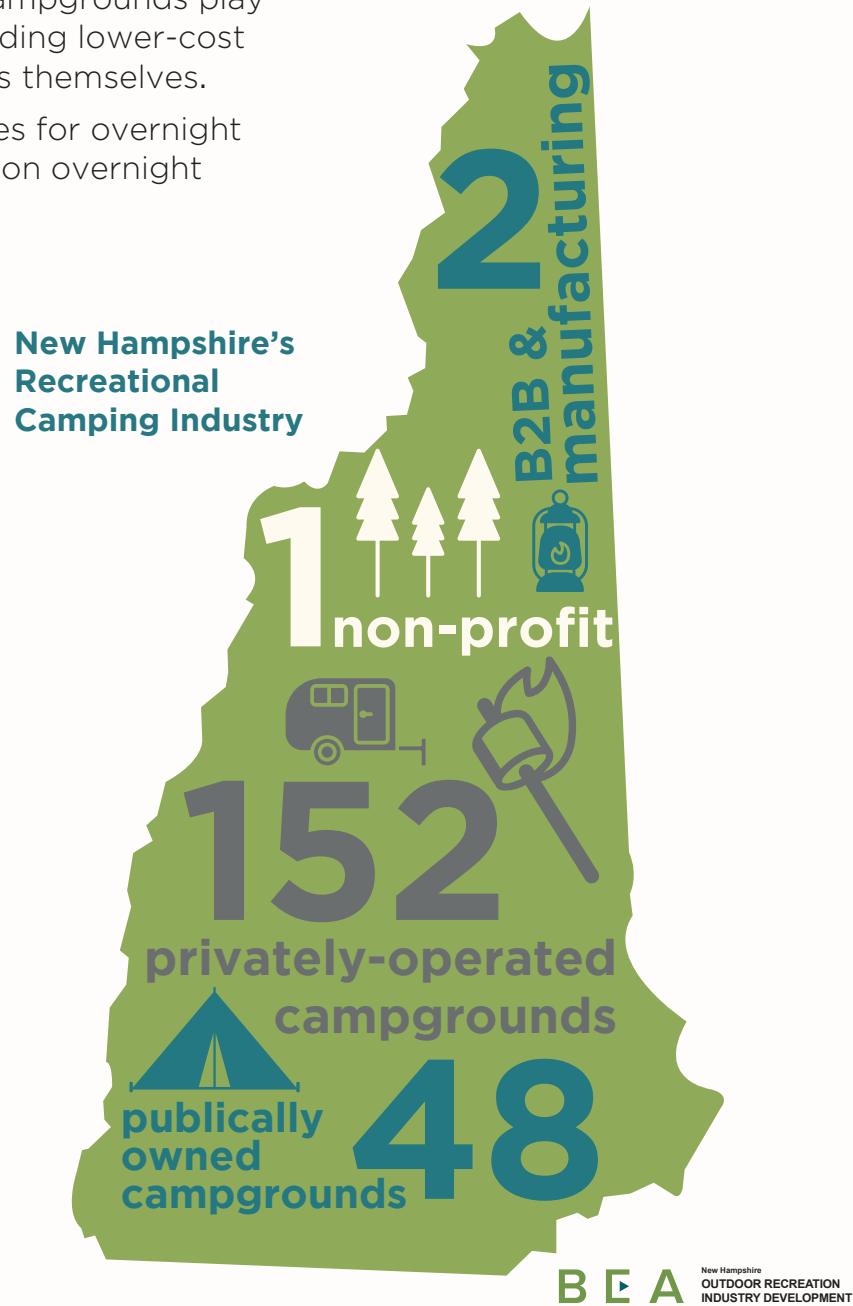
Key Takeaways

Campgrounds can be found all over New Hampshire, with the **highest concentrations of campgrounds found in the White Mountains and Lakes Regions.**

Evidence suggests that participation in camping in New Hampshire has been **increasing steadily** for at least the past decade.

75% of campgrounds in New Hampshire are privately-operated. The White Mountain National Forest and New Hampshire State Parks each operate over 20 campgrounds.

Nearly **three-quarters** (71%) of visitors to New Hampshire campgrounds are from **out-of-state.**



CAMPING OVERVIEW

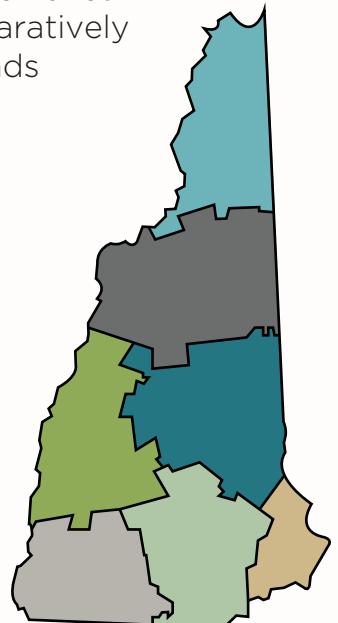
Geographic Availability

A photograph of a glowing orange tent at night with a person standing inside.

There are approximately 200 campgrounds in New Hampshire, totaling nearly 18,000 individual campsites. The highest concentration of campgrounds are found in northern New Hampshire, particularly in the White Mountains and Lakes regions. There are few campgrounds in the greater Nashua region or in the region between Keene and Claremont. There are approximately 152 privately-operated campgrounds in New Hampshire, accounting for around 75% of all campgrounds. In most regions of the state, at least 90% of campgrounds are privately-operated. The exception is the White Mountains region, where approximately half (47%) of campgrounds are operated by the US Forest Service or New Hampshire State Parks. In total, the US Forest Services operates 20 campgrounds in the White Mountain National Forest, and New Hampshire State Parks operates 22 campgrounds statewide.

The types of camping offered at campgrounds vary across the state. RV-focused campgrounds are most plentiful in the Lakes Region and Merrimack Valley and there are comparatively few in the White Mountains. However, campgrounds that offer both car and RV camping are common across all regions of the state. Campgrounds that focus solely on car camping are found almost exclusively in northern New Hampshire. In the White Mountains, there are a small number of primitive car camping sites that offer no water or services and are available on a first-come, first-served basis.

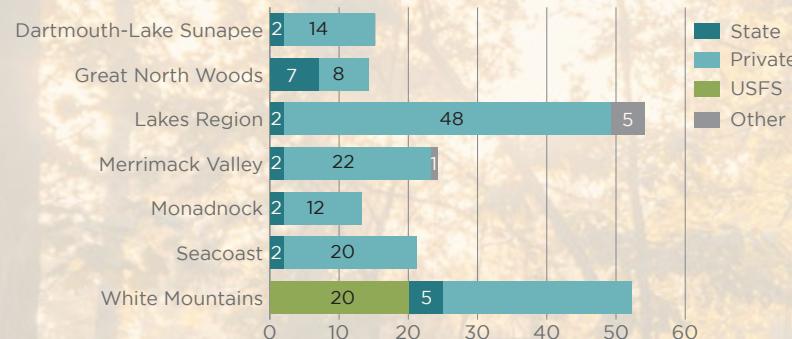
- Great North Woods
- White Mountains
- Dartmouth-Lake Sunapee
- Lakes Region
- Monadnock
- Merrimack Valley
- Seacoast



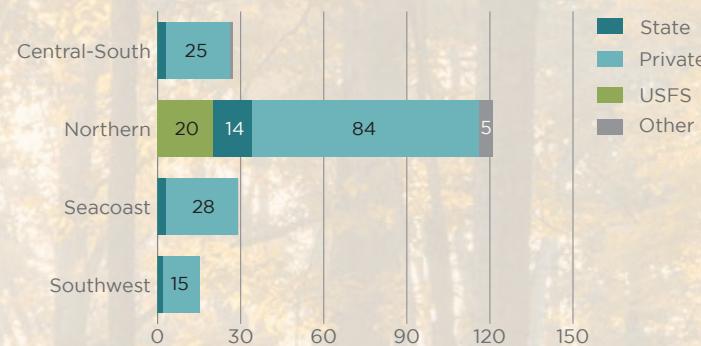
CAMPING IN NEW HAMPSHIRE

Campground Operators

Campground Operator by Tourism Region

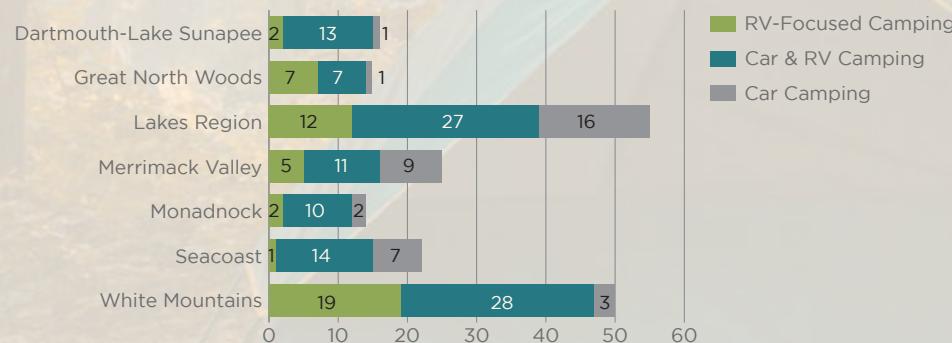


Campground Operator by CEDR Region



Campground Types

Campground Type by Tourism Region



Campground Type by CEDR Region



PARTICIPATION

Currently, there is no data available on the exact number of people participating in camping in New Hampshire statewide. A 2017 Plymouth State University study estimated that there were approximately 994,938 camping site nights per year in New Hampshire (i.e., the number of nights a campsite was occupied by a party), including 825,995 campsite nights at private campgrounds.

There are some additional indicators of the popularity of camping in the state. Campground operators reported a surge in demand during the COVID-19 pandemic, with demand remaining high in the period following the pandemic. This follows a longer-term trend of increasing popularity. The NH Division of Travel and Tourism reported a 53% increase in direct spending on camping by visitors to New Hampshire between 2011 and 2017, compared to an 11% increase in spending by visitors who stayed at other accommodations during the same period. According to a 2019 report from the New Hampshire Campground Owners Association, nearly three-quarters (71%) of visitors to New Hampshire campgrounds are from out-of-state.





INDUSTRY PULSE



Demand for camping in New Hampshire has been increasing over a long period of time, with a surge during the COVID-19 pandemic. Demand has remained high; there are many new participants in camping as a result of the pandemic. Technological improvements such as WiFi service have also helped drive increased participation.



In general, there is optimism about the future of the campground industry in New Hampshire. Campground owners are investing in their facilities, including improving RV hookups and electric vehicle charging.



There has been a trend of corporate consolidation of privately-run campgrounds in New Hampshire. Many of these campgrounds offered seasonal stays prior to corporate acquisition. Afterwards, campgrounds are typically converted into higher-priced, short-term stays.



Despite high demand, there have been minimal new campgrounds opened in New Hampshire in recent years. Barriers are thought to be land availability, land prices, and local zoning regulations. Staffing is also a persistent challenge.

Camping Organizations

There are a variety of public, private, and non-profit organizations that support camping in New Hampshire.

New Hampshire Campground Owners Association: NHCOA promotes camping in New Hampshire through publications and online resources, serves as the business association for private campground owners, and engages with the state legislature on issues related to camping and campground operation.

US Forest Service: USFS operates 20 campgrounds in the White Mountain National Forest, and manages a variety of wilderness and primitive camping opportunities.

New Hampshire State Parks: NHSP operates 22 campgrounds around New Hampshire.

Overnight Backpacking Organizations: Please see the Hiking summary for an overview of organizations that support overnight backpacking opportunities in New Hampshire.



Economic Impact Studies

There are no recent studies on the economic impact of camping in New Hampshire.

Data Needs

- Updated data on participation, including frequency and demographic breakdowns
- Updated economic impact data



2023 NEW HAMPSHIRE
OUTDOOR INDUSTRY INVENTORY
**CLIMBING &
MOUNTAINEERING**



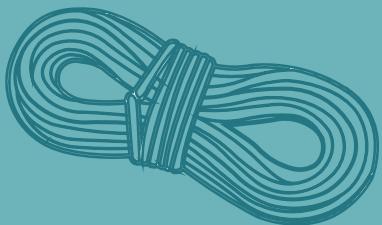
B E A
New Hampshire
OUTDOOR RECREATION
INDUSTRY DEVELOPMENT

EXECUTIVE SUMMARY

Rock climbing involves scaling natural rock formations, typically with the use of safety ropes and harnesses. Ice climbing is similar in nature to rock climbing, involving the scaling of steep or vertical columns of ice in the winter using specialized ice tools. Mountaineering refers to ascents of mountain summits that involve some degree of technical difficulty – this could include rock climbing or ice climbing, ascending steep snowfields using crampons and ice axes, or ascending and descending a mountain on skis in the winter.

Key Takeaways

New Hampshire hosts a wide variety of climbing and mountaineering opportunities, from small crags and boulders to premier national climbing destinations such as Rumney Rocks.



In addition to retail gear businesses, there is a cluster of climbing and mountaineering guide services located in the White Mountains region.

The White Mountains region is the hub for New Hampshire's most well-known climbing and mountaineering routes



New Hampshire's Recreational Climbing Industry



CLIMBING OVERVIEW

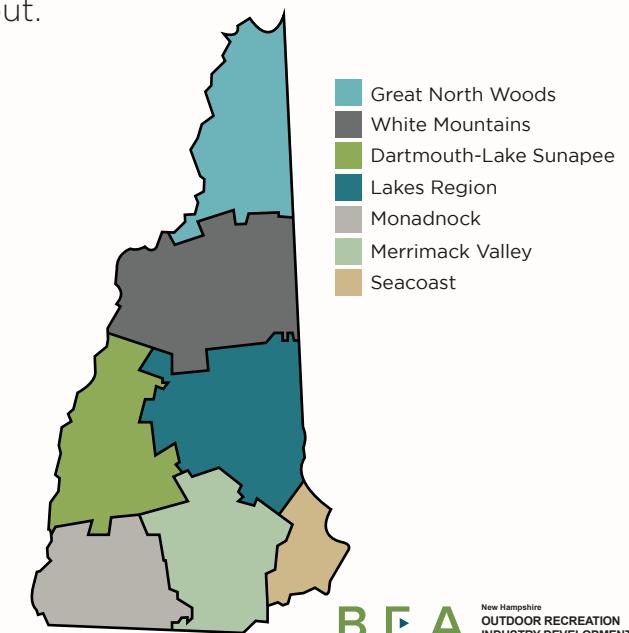
Geographic Availability

The White Mountains region is the hub for New Hampshire's most well-known climbing and mountaineering routes. Crags such as Rumney Rocks and Cathedral Ledge are nationwide destinations for rock climbing, and Cannon Mountain and Crawford Notch host significant ice climbing routes. Mount Washington is well-known as both a training ground for winter mountaineers planning to tackle larger peaks and a notable winter mountaineering achievement itself. Other White Mountain peaks provide opportunities for winter mountaineering adventures, and there are numerous other opportunities for both rock and ice climbing across the National Forest and nearby.

Outside the White Mountains, other regions of New Hampshire host notable rock and ice climbing opportunities. The Great North Woods, Lakes, and Monadnock Regions have mountainous terrain that support both rock and ice climbing routes, while the Dartmouth-Lake Sunapee, Merrimack Valley, and the Seacoast regions have bouldering opportunities scattered throughout.

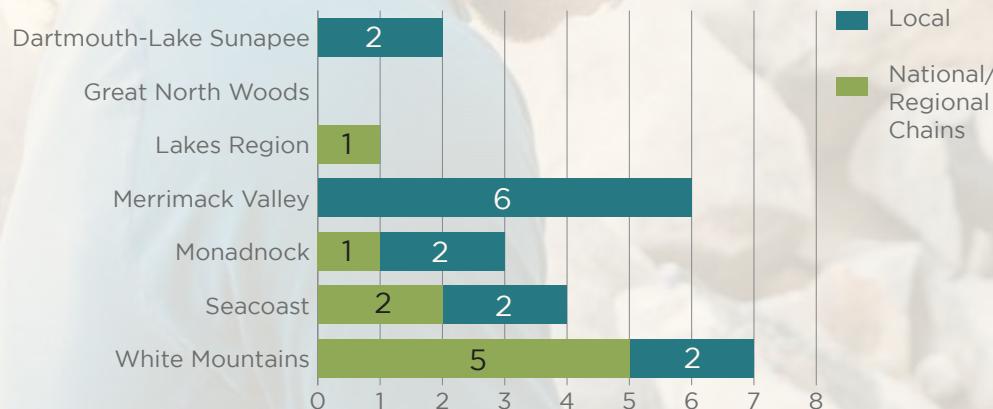
Participation

Climbing and mountaineering are dispersed activities, which makes tracking participation difficult. Estimates of nationwide participation in rock climbing vary between seven and ten million annual participants. The number of rock climbing and mountaineering guide services in the White Mountains region is a testament to the popularity of these activities in the region.



CLIMBING & MOUNTAINEERING BUSINESSES

Climbing/ Mountaineering Retail Sale Businesses by Tourism Region



In addition to the approximately 29 retail businesses that provide climbing and mountaineering gear, there are approximately 11 guiding services that bring clients on guided climbs and mountaineering adventures. Nearly all of these guiding services are located in the White Mountains region.

Climbing/ Mountaineering Retail Sale Businesses by CEDR Region



Climbing Organizations

There are a variety of public, private, and non-profit organizations that support climbing in New Hampshire.

Public Land Managers: Land managers such as the White Mountain National Forest steward lands and access trails to climbing and mountaineering routes.

Access Fund: Access Fund is a nationwide non-profit that secures access to cherished climbing routes. Examples of Access Fund's work in New Hampshire include securing conservation and recreation easements that provide access to climbing routes on Cathedral and Whitehorse Ledges, two of the most well-known climbing areas in the state.

Appalachian Mountain Club: AMC organizes climbing and mountaineering outings around the White Mountains region.

Search-and-Rescue Organizations: Search-and-rescue outfits include New Hampshire Fish and Game, White Mountain National Forest, and volunteer organizations. These organizations assist with technical rescues of climbers and mountaineers.

Mount Washington Avalanche Center: MWAC publishes daily avalanche forecasts for the Presidential Range to make climbers and mountaineers aware of the potential for avalanches along their routes.

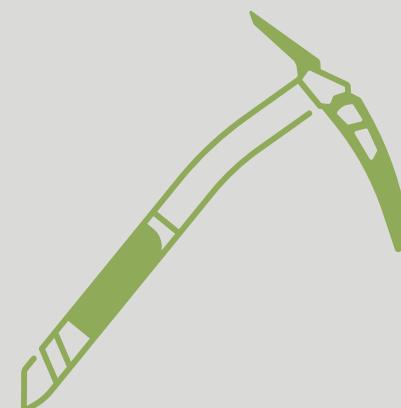


Economic Impact Studies

To-date, there have been no studies of the economic impact of climbing or mountaineering in New Hampshire.

Data Needs

- > Economic impact of climbing and mountaineering
- > Participation in climbing and mountaineering, including demographic breakdowns





INDUSTRY PULSE



Guide services are critical for bringing people into the sports of climbing and mountaineering. These sports require significant gear and expertise – guides provide both. For infrequent participants in climbing and mountaineering, guide services offer a way of participating in the sport without having to make expensive gear purchases.



Participation in rock climbing in New Hampshire is increasing. Indoor rock climbing gyms have grown in popularity and several new gyms have opened recently; indoor gyms are often a gateway for participants interested in climbing outdoors.



Workforce development and retention is a key issue for guide services. It is difficult for guiding services to offer year-round employment opportunities. Increased costs of living have made it less attractive for seasonal, entry-level guides to spend summers or winters guiding; this is compounded by limited housing availability in mountain towns. The costs of becoming a nationally-certified guide are also high. Local high schools, such as Kennett High School in Conway, have began to offer technical training for outdoor industry careers, which is a positive step.



Warming winters present a challenge for mountaineering and ice climbing. Guiding services report that the ice climbing season is one to two months shorter than in past years due to unreliable ice conditions.



2023 NEW HAMPSHIRE OUTDOOR INDUSTRY INVENTORY **FISHING**

B C A
New Hampshire
OUTDOOR RECREATION
INDUSTRY DEVELOPMENT

EXECUTIVE SUMMARY

Fishing takes place in lakes, ponds, streams, rivers, and coastal areas of New Hampshire. Fishing can take a variety of forms, from casting from the shore of streams and ponds to chartered ocean fishing excursions to ice fishing on frozen lakes in the winter.

Key Takeaways

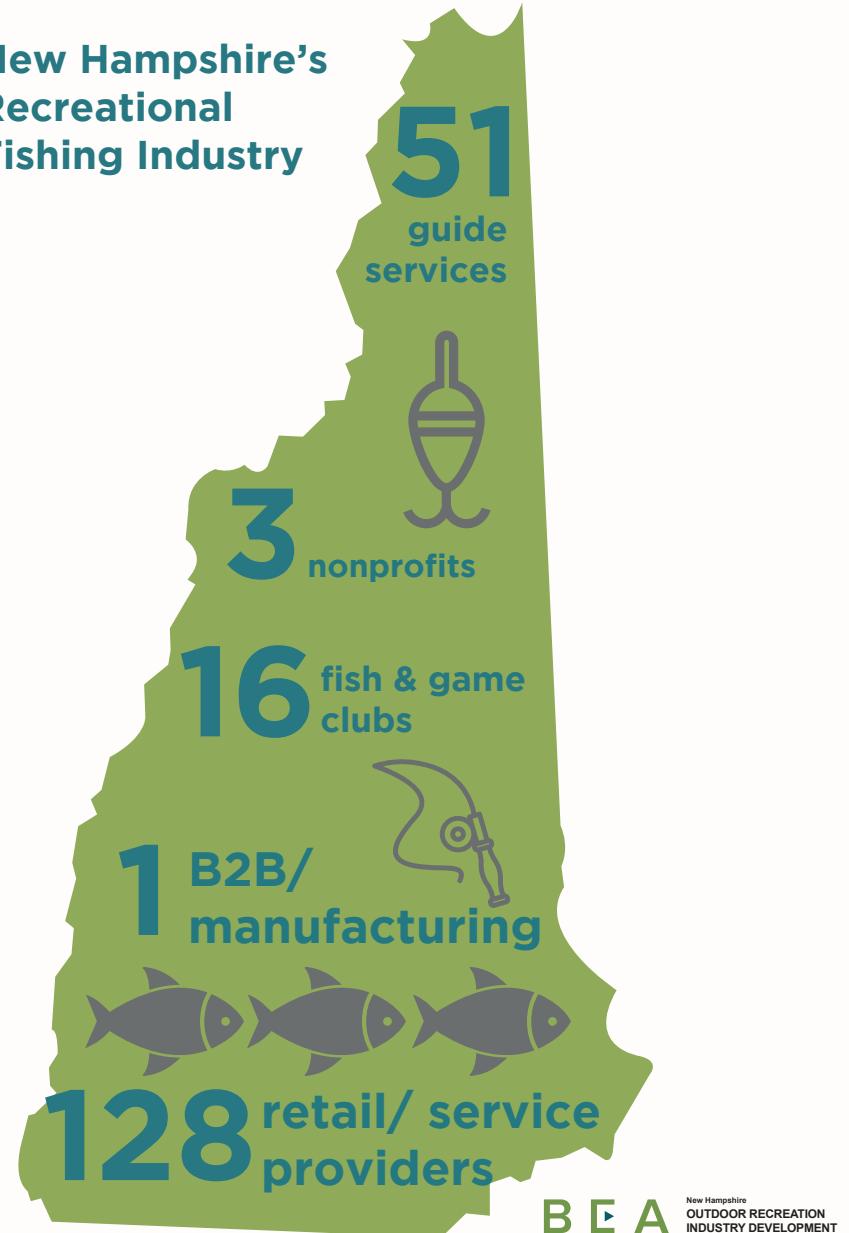
New Hampshire has plentiful fishing opportunities in close proximity to many residents, thanks in part to **state laws ensuring public access** to waterbodies.

Fisheries in New Hampshire are stewarded through a partnership of state agencies and non-profit organizations. New Hampshire Fish and Game annually **stocks over 1 million trout** in the state's lakes, ponds, rivers, and streams.

A 2019 study estimated the economic impact of freshwater fishing at approximately **\$215 million per year** in New Hampshire, \$150 million of which is attributable to trout fishing.

While New Hampshire's fish populations are currently healthy, **changes in climate are a primary threat** to the viability of popular cold-water species such as trout.

New Hampshire's Recreational Fishing Industry



FISHING OVERVIEW

Geographic Availability



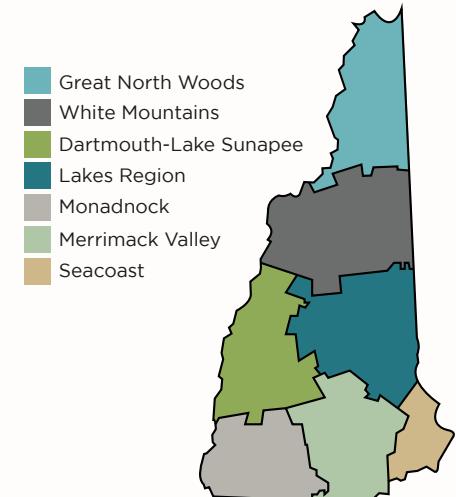
Fishing opportunities are widely available all across New Hampshire. By law, public access is provided to all rivers, streams, tidal waters, and natural lakes over 10 acres in size in New Hampshire. State records indicate that there are over 980 formal public access sites to waterbodies in the state. New Hampshire Fish and Games annually stocks trout into over 300 streams, as well as many lakes and remote ponds. Landlocked salmon are also stocked in 15 waterbodies.

In addition to publicly-accessible fishing opportunities, there are a variety of fish and game clubs in New Hampshire that provide membership- or fee-based access to privately-owned waters for fishing and other outdoor pursuits.

Fishing experiences can vary depending on the location and geography of regions. Trout are a prized fish species that are typically confined to colder waters, with natural populations more prevalent in mountain streams and northern areas. Other species such as bass are more adaptable and can be found in a variety of fresh waterbodies. Ocean anglers typically target striped bass along New Hampshire's coast.

Participation

The number of paid fishing license holders in New Hampshire increased slightly over a 15 years period from 2006 to 2019 (140,824 to 159,699, respectively), then surged to record levels in 2020 during the COVID-19 pandemic, with 191,034 licenses sold.



FISHING BUSINESSES

Retail Stores



Other Fishing Businesses

In addition to the above brick-and-mortar businesses, there are a number of other private businesses involved in fishing in New Hampshire:

- Approximately 38 coastal fishing charter operators, all located in the Seacoast region.
- Approximately 13 freshwater fishing outfitting and guide services, located primarily in central and northern New Hampshire.
- Many campgrounds in New Hampshire are located on waterbodies and provide private fishing access locations for overnight guests.

Fishing Organizations

There are a variety of public, private, and non-profit organizations that support fishing in New Hampshire.

New Hampshire Fish & Game: In 2022, NHFG stocked 1.1 million trout and nearly 40,000 landlocked salmon with fish raised at the state's six fish hatcheries. NHFG issues fishing licenses, monitors the health of fisheries, enforces regulations on fishing to manage healthy fish populations, and partners with non-profit organizations to promote public access to fishing opportunities and improve fish habitat. NHFG is self-funded through license fees, fines, and grants.

Public land managers: public lands provide access to fishing opportunities and protect riparian habitats that support healthy fish populations. This includes state and federal agencies, such as New Hampshire State Parks and the White Mountain National Forest, but also includes local town forests, land trusts, and other non-profit partners.

Non-profit organizations: non-profit organizations provide a variety of supportive services for New Hampshire fisheries and anglers, including stream restoration projects, organizing fishing tournaments, and promoting youth participation.

Fish and game clubs: fish and game clubs provide membership-based access to privately-owned waterbodies for fishing and other outdoor pursuits. There are approximately 16 fish and game clubs in New Hampshire that provide access to fishing, most of which are located in the southern or central part of the state.





INDUSTRY PULSE

➤ Participation in fishing is at an all-time high in New Hampshire. New Hampshire is unique in that it is a small state where anglers can “do it all”, with opportunities for trout fishing in mountain streams, bass fishing in lakes and ponds, and ocean fishing for striped bass all within a few hours drive.

➤ Overall, New Hampshire’s fish populations are healthy. There is not much evidence to suggest that fish populations are being “overfished”, despite the concerns of some. New Hampshire’s fish stocking program is vital to maintaining healthy trout populations and providing fishing opportunities.

➤ Partnerships with non-profit organizations are critical for restoring and improving fish habitat in New Hampshire. Projects such as culvert upgrades, riparian habitat restoration, and in-stream fish habitat improvements are critical for maintaining healthy fisheries, but are typically beyond the capacity of state agencies to implement. While a number of impactful projects have been completed in New Hampshire, the need for fisheries restoration greatly exceeds the available resources for completing restoration projects.

➤ Fluctuations in winter temperatures and weather have impacted the viability and safety of ice fishing in recent years, and warming water temperatures may impact the health and viability of trout populations in the southern portion of the state in future years.

ECONOMIC IMPACT STUDIES

A 2011 study found that there were 228,000 anglers participating in fishing in New Hampshire, resulting in \$209 million in related expenditures by visitors and non-visitors. A 2019 study estimated the economic impact of freshwater fishing at approximately \$215 million per year in New Hampshire, \$150 million of which is attributable to trout fishing.

Data Needs

- » Economic impact of coastal/ocean fishing
- » Demographic breakdown of participants





**2023 NEW HAMPSHIRE
OUTDOOR INDUSTRY INVENTORY**
HIKING

EXECUTIVE SUMMARY

Hiking opportunities in New Hampshire are boundless – from town forests and parks to the trails ascending 4,000-foot peaks in the White Mountains. Hiking typically refers to walks that take place on trails in a natural setting, and can range from short walks on well-established paths to overnight, long-distance backpacking trips in remote, mountainous terrain. Hiking is a common introductory activity for people that are new to outdoor recreation, with fewer skill and gear requirements than many other sports. This promotes accessibility to hiking opportunities but can also introduce recreation management and safety considerations.

Key Takeaways

Hiking is a popular activity for residents and visitors. A 2011 study found that **12% of overnight leisure travelers to New Hampshire participated in hiking or overnight backpacking.**

The White Mountain National Forest is a premier hiking destination, featuring over 1,200 miles of trail. However, **there are plentiful hiking opportunities all over the state**, including trails in state parks, town forests, locally conserved lands, and private lands.

While the economic impact of hiking has not been comprehensively studied in New Hampshire, there is evidence of a **strong economic contribution**, with at least 116 retail businesses selling hiking gear and at least ten guiding services operating in the state.

There are a **variety of government agencies and non-profit organizations that are critical to supporting hiking opportunities** in New Hampshire, including public land managers, non-profit trail organizations, and search-and-rescue organizations.





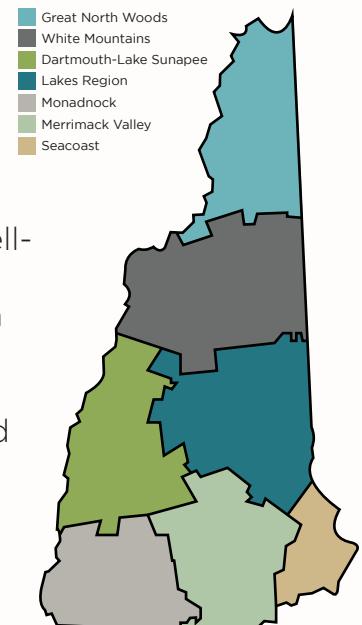
HIKING OVERVIEW

Geographic Availability

As of June 2023, there were 4,420 mapped miles of publicly-accessible trail where hiking is permitted in New Hampshire, which likely represents an undercount when factoring in lesser-known local trails. Hiking opportunities can be found in every corner of New Hampshire, as it is rare for hiking to be restricted on public trails. The White Mountain National Forest (WMNF) contains some of the most well-known and sought-after hikes in the state, with over 1,200 miles of non-motorized trail accessing peaks, rivers, and waterfalls. The Lakes Region also contains many destination hikes, as does the southwest region of the state, with Mount Monadnock considered by many to be one of the most-climbed mountains in the world.

Outside of these popular hiking destinations, there are vast networks of local hiking trails across the state that are used by residents. This includes trails in town forests and lands conserved by local land trusts, as well as a significant number of trails on private lands where the public is welcomed. The state's current use program provides a tax incentives for landowners to permit hiking (and other recreational activities) on private land.

In addition to day hiking opportunities, there are vast, well-known opportunities for overnight backpacking in New Hampshire. The Appalachian Trail (AT) enters the state in Hanover and runs up through the White Mountains into Maine, for a total of 161 miles in New Hampshire. The AT is served by a network of lean-to's, campsites and staffed shelters. In addition to the AT, backpackers can choose from a multitude of loops and backcountry camping options in the WMNF, or hike from the Presidential Range to the Canadian border on the recently-established Cohos Trail.



HIKING OVERVIEW

Participation

Tracking statewide participation in hiking is a difficult task due to the dispersed nature of the activity; however, existing data indicate that hiking is a very popular activity amongst residents and visitors. A 2011 survey by Plymouth State University of overnight leisure travelers in New Hampshire found that 11.7 percent went hiking or backpacking during their stay. The WMNF is one the most-visited National Forests in the country within over 4 million visitors annually; hiking is one of the most popular activities on the forest.

There is evidence that trail running (i.e., running on hiking trails) has increased in popularity in New Hampshire as well; there are now dozens of annual trail running races across the state, including the Loon Mountain Race which attracts runners from all over the country and has served as the course for the USATF National Mountain Running Championship race in previous years.

SNOWSHOEING

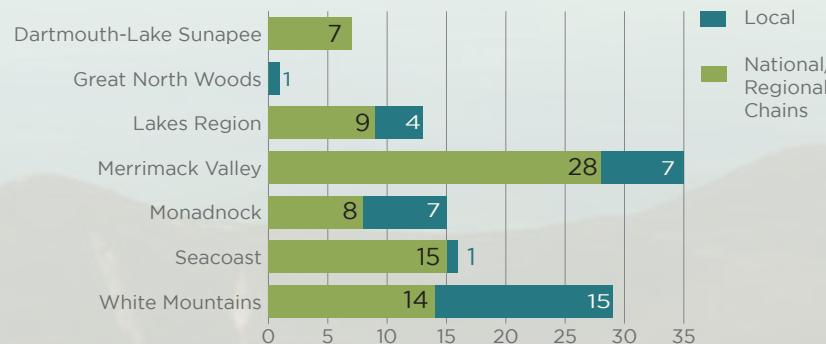
Snowshoeing is a popular winter activity that primarily occurs on hiking trails. Snowshoeing can entail anything from a casual walk in a town forest to ascending a 4,000 foot peak in the White Mountains. At least eight businesses in New Hampshire offer snowshoe rentals, primarily in northern New Hampshire.



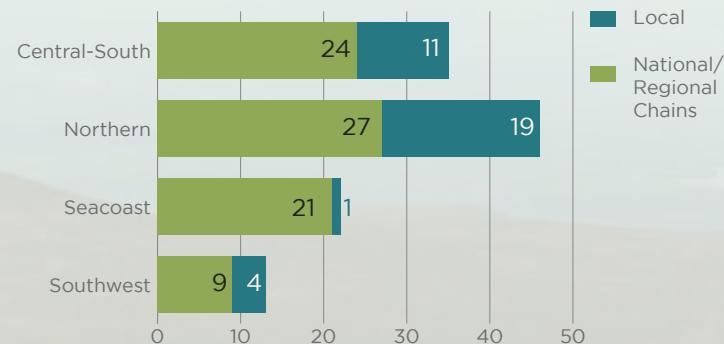
HIKING BUSINESSES

Retail Stores

Hiking Retail Sale Businesses by Tourism Region



Hiking Retail Sale Businesses by CEDR Region



In addition to these brick-and-mortar retail businesses, there are other private businesses involved in hiking in New Hampshire, including at least ten guiding services and several manufacturers of outdoor apparel. At least 25 New Hampshire retailers sell snowshoes which can be used for winter hiking; nine of these retailers also provide snowshoe rentals.

Hiking Organizations

There are a variety of public, private, and non-profit organizations that support hiking in New Hampshire.

White Mountain National Forest: the WMNF hosts over 1,200 miles of non-motorized trails. Forest staff partner with non-profit organizations to maintain and improve trail, conduct visitor education and safety outreach, and provide search-and-rescue services.

New Hampshire State Parks: most State Parks provide opportunities for hiking.

Local Conservation Organizations: there are number of non-profit organizations in New Hampshire that facilitate access to hiking trails by conserving land and maintaining trail systems, or facilitating the purchase or transfer of land from private to public ownership. This includes non-profit land trusts and conservation organizations, as well as municipal conservation commissions and parks departments.

Hiking and Outing Clubs: hiking clubs are time-honored tradition in New Hampshire. These clubs provide a variety of services, from organizing group hiking experiences, to partnering with the WMNF and other land managers to maintain hiking trail systems, shelters, and other facilities. For example, the Appalachian Mountain Club maintains reservable shelters for overnight backpackers, partners with trail managers to assist with trail maintenance, and spearheads a variety of conservation efforts, while the Dartmouth Outdoor Club is responsible for maintaining over 50 miles of the Appalachian Trail. There are also a number of out-of-state outing clubs that bring members up to New Hampshire for hiking, including multiple BIPOC-focused outing clubs in the greater Boston area.

Search-and-Rescue: hikers comprise the majority of search-and-rescue (SAR) calls in New Hampshire. SAR services are provided in New Hampshire by a partnership consisting of New Hampshire Fish and Game, WMNF staff, local first responders, and non-profit SAR outfits operating in different areas of the state; the latter of which rely heavily on volunteers. Currently, there are over ten volunteer SAR teams in the greater White Mountains region. New Hampshire Fish and Game also administers the Hike Safe card program, which supports SAR efforts and is a key method for providing hiker safety information.





INDUSTRY PULSE



Many factors contribute to hiking being a very popular activity in New Hampshire. There is a long tradition of hiking in New Hampshire, with some outing clubs dating back to the 19th century. The White Mountains and other well-known hiking destinations in New Hampshire are easily accessible from popular centers in southern New Hampshire and the Boston metro area. Additionally, hiking is among the most accessible outdoor recreation activities and is frequently the “gateway” to the outdoors for new outdoor recreationalists.



The popularity of premier hiking destinations in New Hampshire has steadily increased, most notably in the White Mountains. This has led to concerns about impacts to natural resources, visitor safety, and the quality of visitors' experiences. As one example, in 2018 New Hampshire State Parks began operating a shuttle service within Franconia Notch State Park to address overflow parking at trailheads that was backing up onto Interstate 93.



Partnerships between public land managers, state agencies, and non-profit organizations are critical in supporting hiking opportunities in New Hampshire. For example, in the White Mountain National Forest, regional outing and trail clubs perform significant trail maintenance work on the National Forest, and volunteer-based search-and-rescue organizations provide needed life safety services for injured or lost hikers.



Trails in town forests, privately conserved land, and private property provide important local hiking opportunities for residents. These trails are typically maintained by volunteers through organized or ad-hoc activities. Local trail networks can be challenged by conflicts between different types of trail users, as local trail managers may not have the resources or legal authority to manage trail disputes.

ECONOMIC IMPACT STUDIES

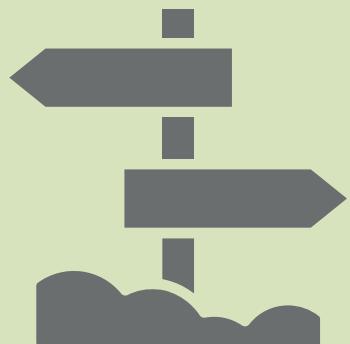
To-date, no studies have been completed to understand the full economic impact of hiking in New Hampshire. A 2015 Plymouth State University study found that out-of-state, overnight guests at Appalachian Mountain Club lodges and backcountry huts supported nearly \$18 million in economic activity in New Hampshire in a one-year period; however, this represents just a small subset of hiking participants in the state.

The economic impact of hiking has been studied in similar contexts to New Hampshire. For example, a 2016 study found that out-of-state hikers visiting the Long Trail in Vermont contributed approximately \$4 million in annual spending statewide.

Data Needs

>> Economic impact of hiking

>> Participation in hiking sports, including demographic breakdowns



A dynamic photograph of a person riding a chestnut horse in an outdoor setting. The horse is in mid-stride, kicking up dust from the ground. The rider is wearing equestrian attire: a black helmet, a dark vest over a light-colored long-sleeved shirt, white breeches, and black boots. The background shows a blurred landscape of trees and fields, suggesting a rural or park-like environment.

**2023
NEW HAMPSHIRE OUTDOOR
INDUSTRY INVENTORY
EQUESTRIAN**

B E A

New Hampshire
OUTDOOR RECREATION
INDUSTRY DEVELOPMENT

EXECUTIVE SUMMARY

Horseback riding takes place on trails, fields, and quiet roads across New Hampshire. This can include riding for pleasure on trails, packing horses for overnight trips, and visiting horse stables for guided rides.

Key Takeaways

Horseback riding involves a variety of gear, equipment and expenses. Accordingly, horseback riding supports a diverse business mix throughout New Hampshire, including gear retailers, horse boarding facilities, trainers, riding lessons, farriers, veterinarians, and fee-based trail rides. Anecdotally, the use of horse boarding facilities has increased in recent years.

Traditionally, a lot of horseback riding in New Hampshire was done "property-to-property" on local trail networks. Many of these trail networks have been lost or reduced as a result of development or changing landowners.

Today, riding opportunities are found in State Parks, rail trails, and other public or private trail networks where riding is permitted.





EQUESTRIAN OVERVIEW

Geographic Availability

Horseback riding takes place on public and private trails. Horseback riding is permitted on approximately 250 miles of the state's rail trails. In a 2021 survey from the New Hampshire Horse Council, 95% of respondents indicated that they rode on a New Hampshire rail trail, with the Rockingham Rail Trail and Cheshire Rail Trail being the most popular destinations. According to data from NH Fish and Game, there are at least 235 miles of additional public mapped public trail where horseback riding is permitted (located primarily in southern and central New Hampshire). Major public trail networks include Bear Brook State Park and Pawtuckaway State Park. Currently, there are no mapped public trail networks in the White Mountains region or Great North Woods region that permit horseback riding other than rail trails.

A significant amount of horseback riding occurs on private land. In some cases, these trails are known and open for general public access. Access to private trail networks may also be restricted to club members or paid guests in some cases. Private trail networks allow horseback riders to enjoy quieter trails that are managed for use by horses. A small number of private trail networks support overnight visits. There are at least 113 private facilities that offer trail riding in New Hampshire, mostly in southern and central New Hampshire.

Participation

Horseback riding is a dispersed activity, which makes tracking participation difficult. It is not currently known how many people participate in horseback riding each year in New Hampshire.



EQUESTRIAN BUSINESSES

Retail Stores



In addition to these retail sale businesses, there are approximately 145 horse boarding facilities across the state. There are approximately 118 operators offering horse training and approximately 163 operators offering riding lessons. There are also at least 12 veterinary services focused on equine health.

Equestrian Organizations

There are a variety of public, private, and non-profit organizations that support horseback riding in New Hampshire.

NH State Parks: horseback riding is permitted Bear Brook State Park, Pawtuckaway State Park, Pisgah State Park, Jericho Mountain State Park, the Connecticut Lakes Headwaters Working Forest, and Hampton Beach State Park (off-season only).

NH Trails Bureau: the NH Trails Bureau assists with maintenance of state-owned rail trails.

New Hampshire Horse Council: NHHC advocates for the horseback riding community and industry in New Hampshire on issues of trail access and state legislation, and serves as a liaison between various horse groups in the state.

Local Clubs: local riding clubs host organized trail rides, promote rider safety and education, and coordinate with local landowners that provide trail access.



INDUSTRY PULSE

 Horseback riding generates significant economic activity from the care and housing of horses and significant equipment needs. Horse care and transportation come with significant expenses.

 Trail access is a persistent challenge for the horseback riding community in New Hampshire. Changes in private landownership have impacted important trail connections, particularly in southern and central New Hampshire.

 An increasing percentage of riders must trailer their horses to trailheads, whereas they could previously access larger trail connections by riding from their property. Just under three-quarters (72%) of rides in a 2021 survey indicated that they trailer their horses to trailheads. Many trailheads have limited capacity for trailer parking.

Economic Impact Studies

>> There are no recent studies that have examined the economic impact of horseback riding in New Hampshire.

Data Needs

>> Data on participation, including frequency and demographic breakdowns

>> Economic impact data



**2023 NEW HAMPSHIRE
OUTDOOR INDUSTRY INVENTORY
HUNTING**

EXECUTIVE SUMMARY

Hunting takes place all across New Hampshire and comes in many forms. Hunters target a variety of small and large game, from rabbit to moose, as well as grouse, turkey, and other bird species. There are plentiful opportunities for hunting in nearly every part of the state, including public lands and private lands that are not posted.

Key Takeaways

New Hampshire has plentiful hunting opportunities in close proximity to many residents, thanks in part to a tradition of hunting on private lands that are not posted, as well as public lands.

A 2014 study found that there were 56,000 participating hunters in New Hampshire in 2011, resulting in \$61 million in related expenditures by visitors and non-visitors, which supported 923 jobs.

In addition to New Hampshire Fish and Game, hunting opportunities in the state are supported by a patchwork of non-profit organizations and public and private land managers.

There were historically-high harvests of white-tailed deer and black bear in 2022, despite the overall number of paid hunting licenses being lower than in prior decades.

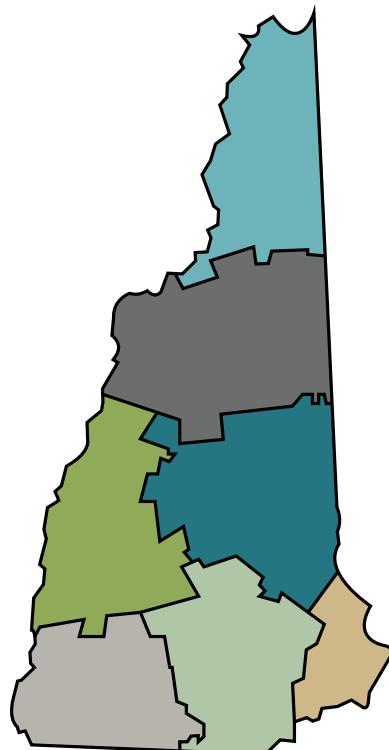


HUNTING OVERVIEW

Geographic Availability

Hunting opportunities are present all across New Hampshire. In addition to hunting on public lands (where permitted), hunters in New Hampshire are permitted to access private lands that are not posted (as well as other recreational pursuits). Since over 70% of lands in New Hampshire are privately-owned, this tradition is critical to supporting hunting in the state. Private landowners with properties enrolled in the state's Current Use program are also provided tax incentives for permitting hunting and other forms of recreation on their property. Despite these permissions, it is a common practice for hunters to request permission to hunt on private property out of courtesy and respect.

In addition to publicly-accessible hunting opportunities, there are a variety of fish and game clubs in New Hampshire that provide membership- or fee-based access to privately-owned lands for hunting and other outdoor pursuits.



- Great North Woods
- White Mountains
- Dartmouth-Lake Sunapee
- Lakes Region
- Monadnock
- Merrimack Valley
- Seacoast

Hunting experiences vary depending on the location and geography of regions. More rural and remote areas of the state offer solitude and vast habitat areas for big game species like moose, whereas some species such as deer can be found in higher concentrations in areas with more human development.

Participation

In 2022, there were 56,295 paid hunting license holders in New Hampshire according to New Hampshire Fish & Game,. Since the mid-2000's, the number of paid license holders has hovered around 60,000 per year. However, this represents a decline from earlier decades. In the 1970's and 1980's, there were typically between 80,000 and 100,000 paid license holders each year in New Hampshire.

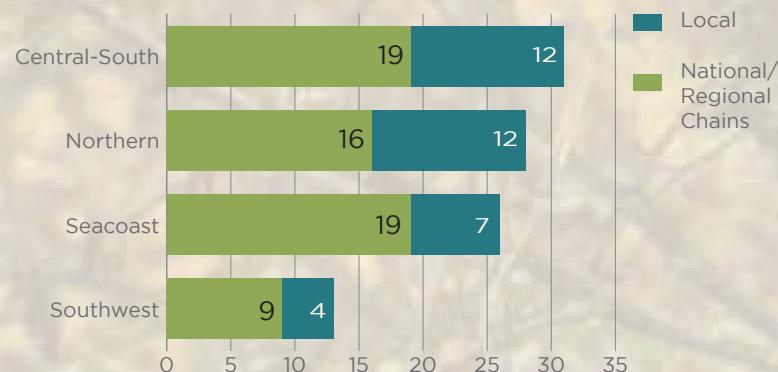
Despite lower numbers of hunting license holders than in past decades, there have been historically-high numbers of animal harvests in recent years. Per New Hampshire Fish & Game, 14,082 white-tailed deer were harvested in New Hampshire 2022, – the third-highest total in state history and an increase of 12% from 2021. Similar historic highs were recorded in 2022 for harvests of black bear. These harvest numbers suggest that there is a core of frequent hunting participants in New Hampshire, despite lower overall participation numbers.



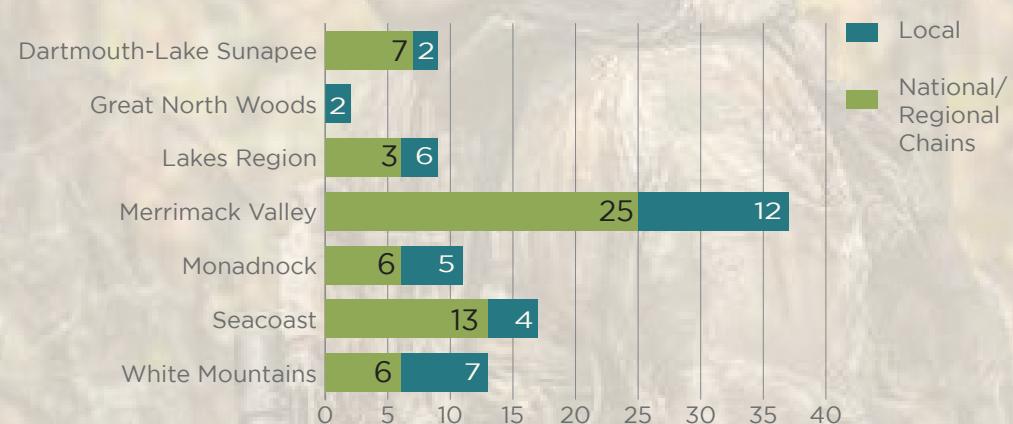
HUNTING BUSINESSES

Retail Stores

Hunting Retail Sale Businesses by CEDR Region



Hunting Retail Sale Businesses by Tourism Region



In addition to these brick-and-mortar retail businesses, there are a number of other private businesses involved in hunting in New Hampshire:

- At least six hunting outfitter and guide services, located primarily in northern New Hampshire.
- There are several firearm manufacturers in New Hampshire that produce hunting rifles and shotguns.

Hunting Organizations

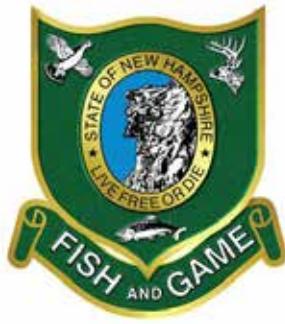
There are a variety of public, private, and non-profit organizations that support fishing in New Hampshire.

New Hampshire Fish & Game: NHFG issues hunting licenses, monitors the health of animal populations, enforces regulations on hunting to manage animal populations and promote public safety, leads Hunter Education courses and youth hunting programs, and annually stocks certain bird species such as pheasant. NHFG is self-funded through license fees, fines, and grants.

Public Land Managers: Public lands provide access to hunting opportunities and protect habitat areas that support healthy animal populations. This includes state and federal agencies, such as New Hampshire State Parks and White Mountain National Forest, but also includes local town forests, land trusts, and other non-profit partners. Hunting is permitted on all White Mountain National Forest lands and in most State Parks.

Non-Profit Organizations: Non-profit organizations such as the New Hampshire Wildlife Federation and Ducks Unlimited provide a variety of supportive services for New Hampshire hunters, including advocating for hunting access, raising funds to support NH Fish & Game, and securing funds to conserve wetland areas and other key habitats.

Fish and Game Clubs: Fish and game clubs provide membership-based access to privately-owned waterbodies for fishing and other outdoor pursuits. There are approximately 38 fish and game clubs in New Hampshire that provide hunting access, most of which are located in the southern or central part of the state.





INDUSTRY PULSE



The COVID-19 pandemic spurred additional interest and participation in hunting. Sporting goods store have been reporting that they cannot keep up with demand for hunting equipment. Technological advances such as GPS systems, game cameras, and social media are also driving interest and participation.



Social media is helping to drive youth interest in hunting, which had been waning in recent decades.



Stewarding hunting opportunities in New Hampshire involves many partnerships, including state agencies, public land managers, private landowners, conservation organizations, farm and timber associations, local conservation commissions, and trail organizations.



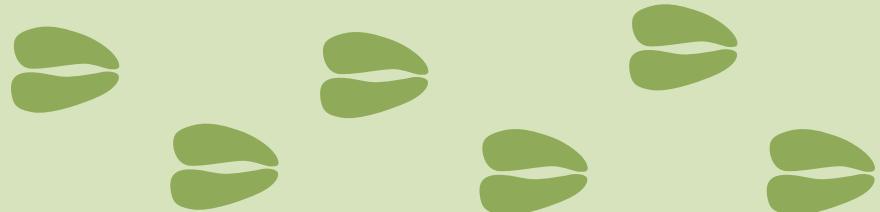
Similar to other northern New England states, New Hampshire's moose population is struggling. Populations have declined steadily for 20 years as a result of increased tick populations and habitat loss. Populations of other key animal species such as deer and black bear are considered healthy, but face similar threats from habitat encroachment and changes in climate, which can affect hibernation and migration patterns.

ECONOMIC IMPACT OF HUNTING

A 2014 US Fish and Wildlife Service study found that there were 56,000 participating hunters in New Hampshire in 2011, resulting in \$61 million in related expenditures by visitors and non-visitors, which supported 923 jobs.

Data Needs

- » Updated economic impact data
- » Demographics of hunting participants





**2023 NEW HAMPSHIRE
OUTDOOR INDUSTRY INVENTORY
MOUNTAIN BIKING**

B E A
New Hampshire
OUTDOOR RECREATION
INDUSTRY DEVELOPMENT

EXECUTIVE SUMMARY

Mountain biking can take a variety of forms but is broadly defined as riding purposely designed bicycles on off-road terrain (e.g., singletrack trails). There are multiple categories of mountain biking, from cross-county riding over rolling terrain to lift-served, downhill-only riding at mountain bike parks and ski areas.

Key Takeaways

Many mountain bike trails in New Hampshire are built, managed, and stewarded by **volunteer-based organizations** such as NEMBA.

To date, **no studies have been completed** to establish the economic contribution of mountain biking in New Hampshire.

Trail networks are predominantly located in **southern and central New Hampshire**.

There are minimal mapped mountain bike trail offerings in the Great North Woods Region.

Reports indicate an **increasing level of participation** in mountain biking in New Hampshire.

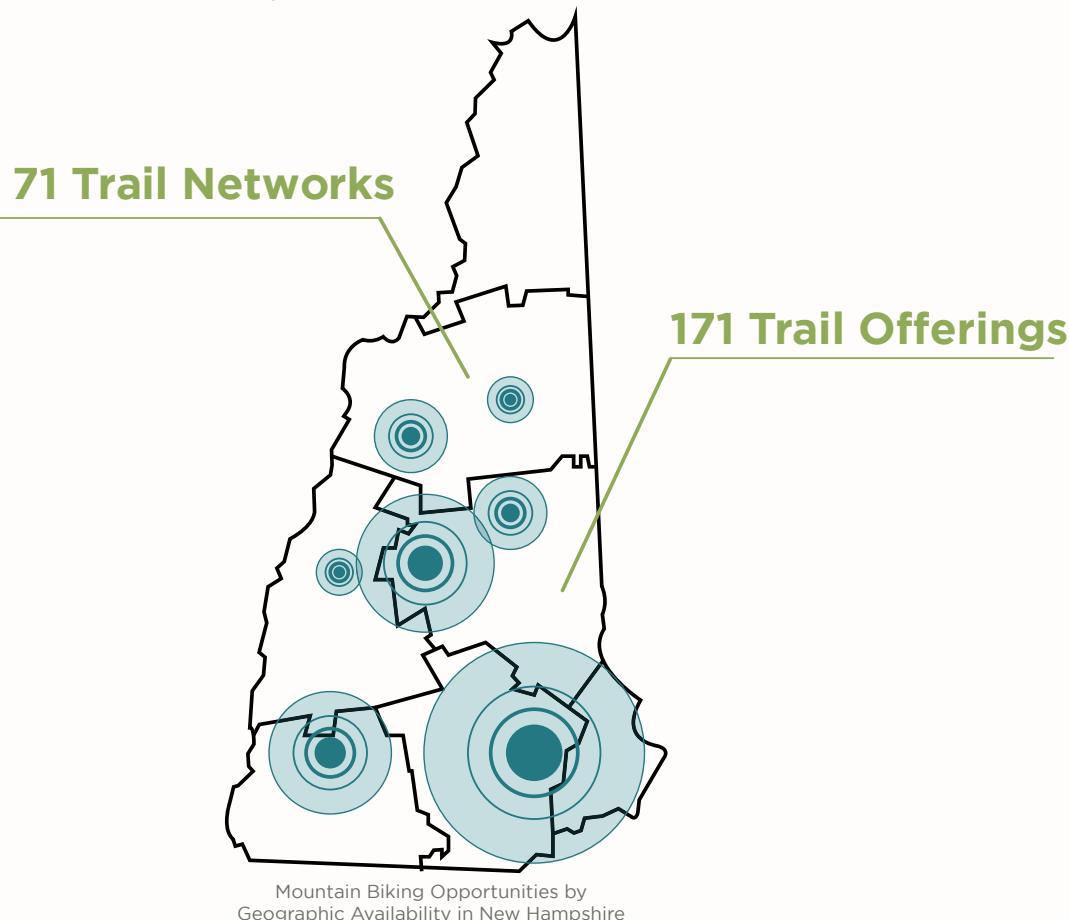


MOUNTAIN BIKING OVERVIEW

Mountain biking can take a variety of forms but is broadly defined as riding purposely designed bicycles on off-road terrain (e.g., singletrack trails). There are multiple categories of mountain biking, from cross-county riding over rolling terrain to lift-served, downhill-only riding at mountain bike parks and ski areas.

Geographic Availability

Mountain biking trails are available all over New Hampshire. Some riding occurs on purpose-built trails that are specific to mountain bikes and advertised to the public, while other riding occurs on old woods trails and roads that may be well-kept local secrets. As such, it is difficult to map all potential mountain biking areas in the state.

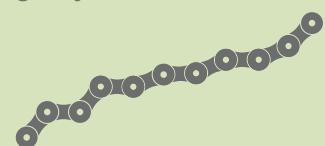


Participation

Minimal data is available about statewide participation in mountain biking in New Hampshire.

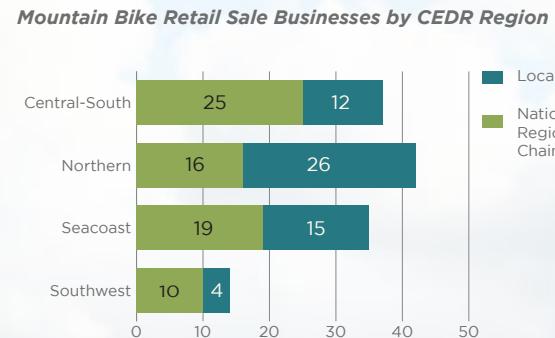
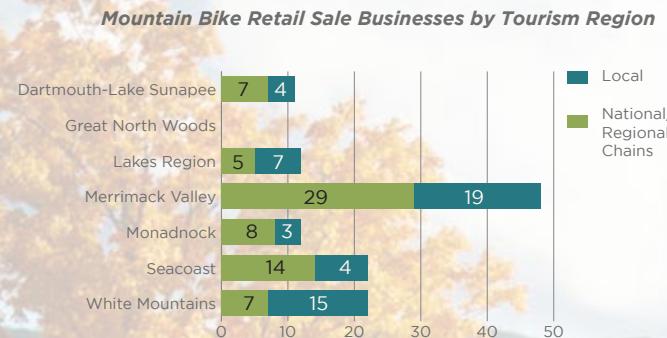
Trail usage data has been captured for individual trail networks, but **no statewide surveys or studies have been completed to-date**. STRAVA Metro and Trailforks data provides some insight on relative levels of use at different mountain bike trail networks.

Reports indicate an increasing level of participation in mountain biking in New Hampshire, evidenced by the expansion of trail networks and organizations, observations of local trail managers, and high demand for bicycles at retail stores. For example, the Coos Cycling Club in Gorham reports that membership has grown 15-20% annually and plans to nearly double its trail mileage by 2025.

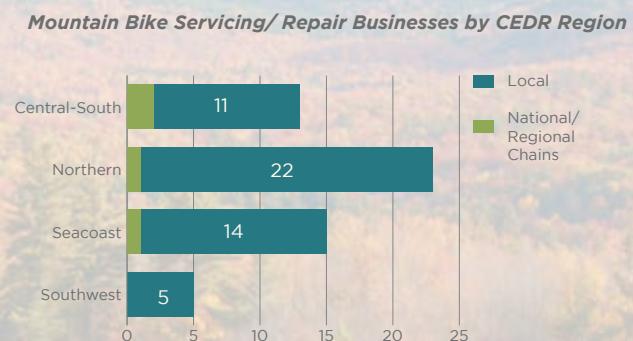
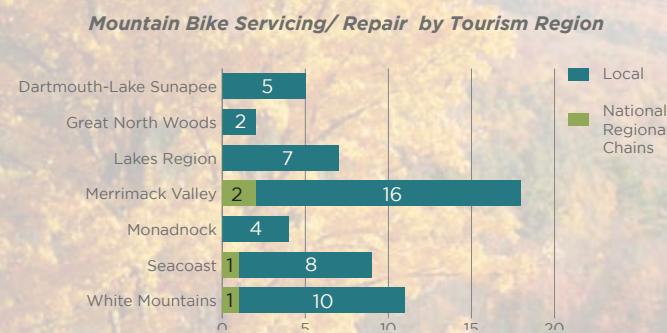


MOUNTAIN BIKING BUSINESSES

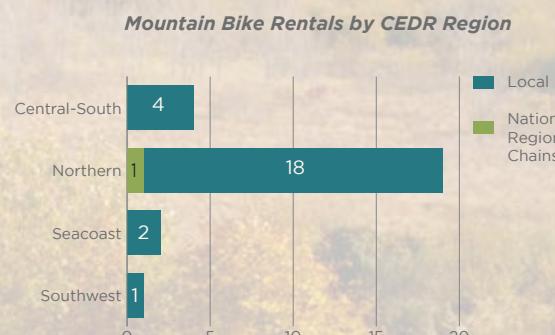
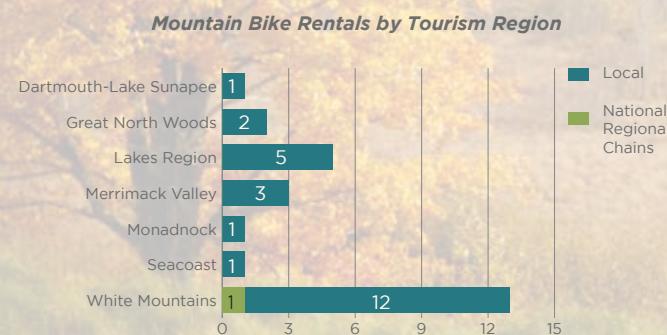
Retail Stores



Servicing and Repair

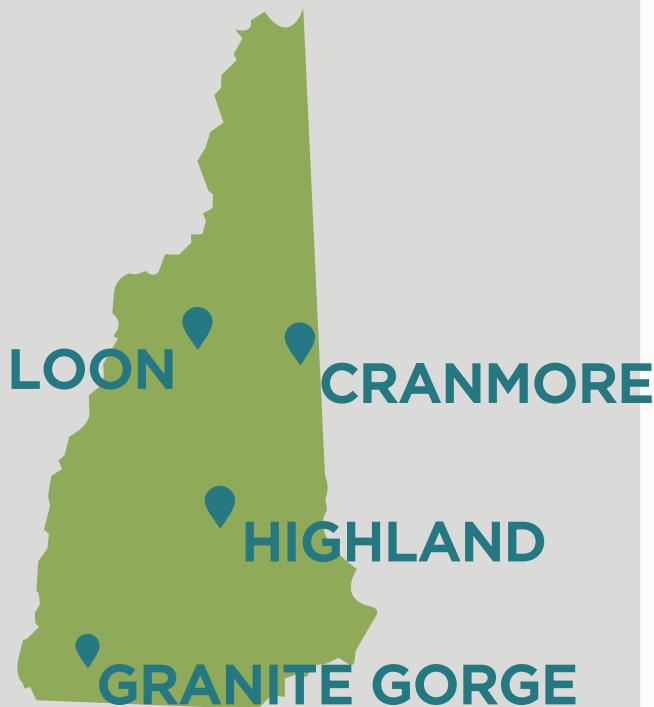


Rentals



Mountain Bike Parks

The vast majority of mountain biking trails in New Hampshire are free at the point of access and open to the general public. Lift-served downhill mountain biking is currently being offered at Cranmore Mountain Bike Park, Loon Mountain Ski Resort, Granite Gorge Mountain Park, and Highland Bike Park. These mountain bike parks are operated for-profit and charge a fee to access their lifts and trails.



Lift-served downhill mountain bike offerings
in New Hampshire

Mountain Bike Organizations

Some mountain bike trail networks in the state are located on municipal lands and are managed by local conservation commissions and/or recreation departments. Mountain bike trails are provided in select State Parks and on National Forest lands as well. Public land managers often have support from local trail organizations for building and maintaining trails.



ECONOMIC IMPACT STUDIES

To date, no studies have been completed to establish the economic contribution of mountain biking in New Hampshire.

The economic impact of mountain biking has been studied in other New England states. For example, The Kingdom Trails Association in Burke, Vermont estimates \$10 million in economic impact and/or direct spending from their 100+ miles of trails that spans four towns. Out-of-state visitors spend an average of \$115 per day during their visit, with an average stay of 2.75 days.

Data Needs

- » Mountain bike participation & demographics
- » Visitor spending
- » Direct employment/compensation
- » Economic value added



Photo Credit Katie Lozancich



INDUSTRY PULSE



While there is a lack of comprehensive data on participation in mountain biking in New Hampshire, there are indicators of increased popularity, including the proliferation of new mountain bike trail building across the state.



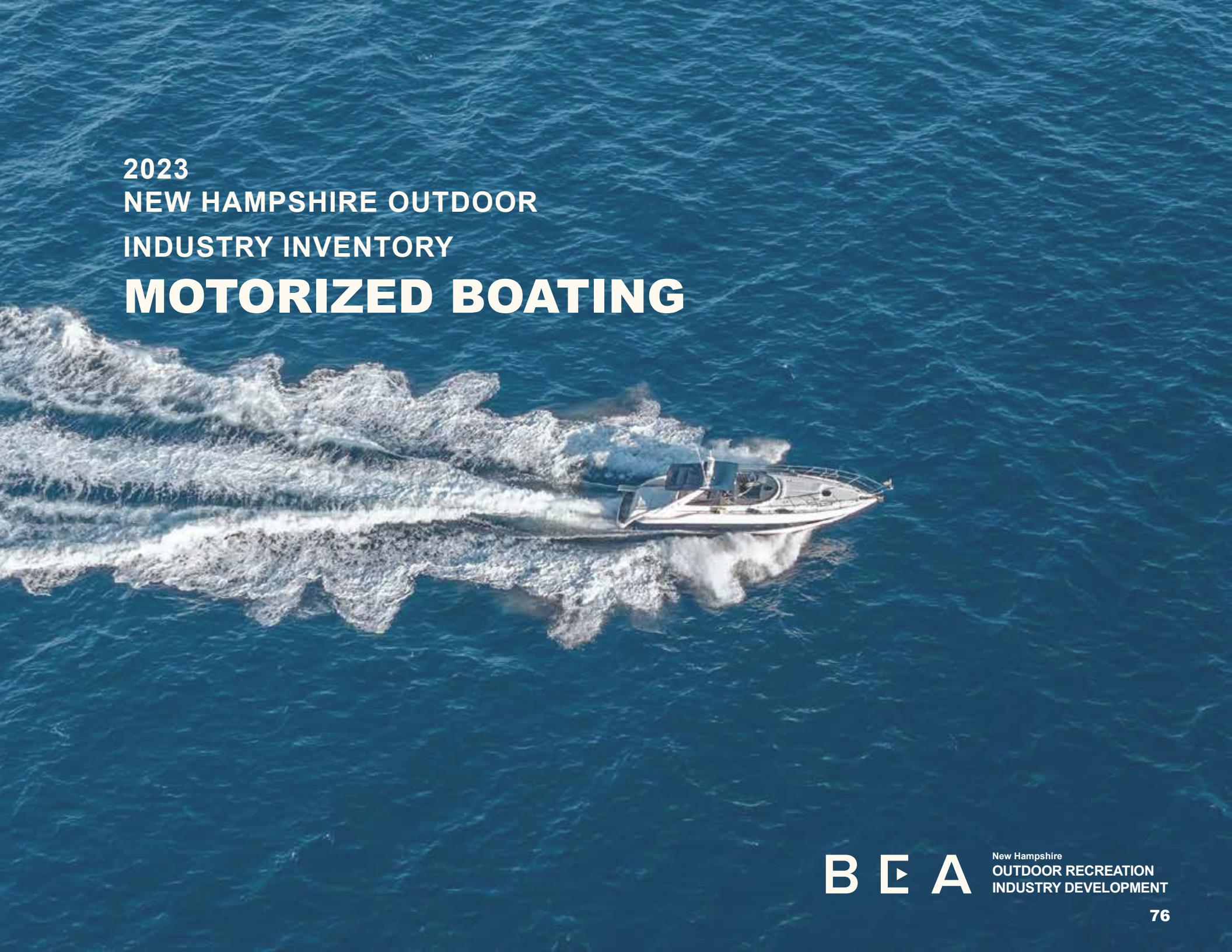
Mountain biking requires a lot of gear - some of it expensive. This translates into relatively high spending by participants, but is also a barrier to entry into the sport. Some schools offer mountain biking clubs or teams as a means of increasing participation for all income levels.



Modern mountain bike trail design has changed the sport by providing a greater variety of trail experiences, including more beginner-friendly and adaptive-friendly trail experiences. Professional trail builders are playing an increased role in designing and building these types of trails.



With the opening of mountain bike trails at Granite Gorge Mountain Park in 2023, there are now four lift-served mountain bike parks in New Hampshire. Lift service allows bikers to access mountainous terrain that would be highly difficult to climb on a bike, and is operated similar to a downhill ski area. Nationwide, lift-served mountain biking is increasing in popularity.

An aerial photograph of a white motorized boat moving through dark blue, slightly choppy water. The boat is creating a large, white wake behind it. The text is overlaid on the upper left portion of the image.

2023 NEW HAMPSHIRE OUTDOOR INDUSTRY INVENTORY **MOTORIZED BOATING**

EXECUTIVE SUMMARY

Motorized boating is popular on New Hampshire's inland waterbodies and coastal areas and is a fixture in many lakeside communities. Motorized boating also includes operating personal watercraft (i.e., jet skis) as well as chartered cruises and fishing expeditions. Motorized boating supports a variety of business activity, from the sale, service, and storage of boating equipment to charter operators.

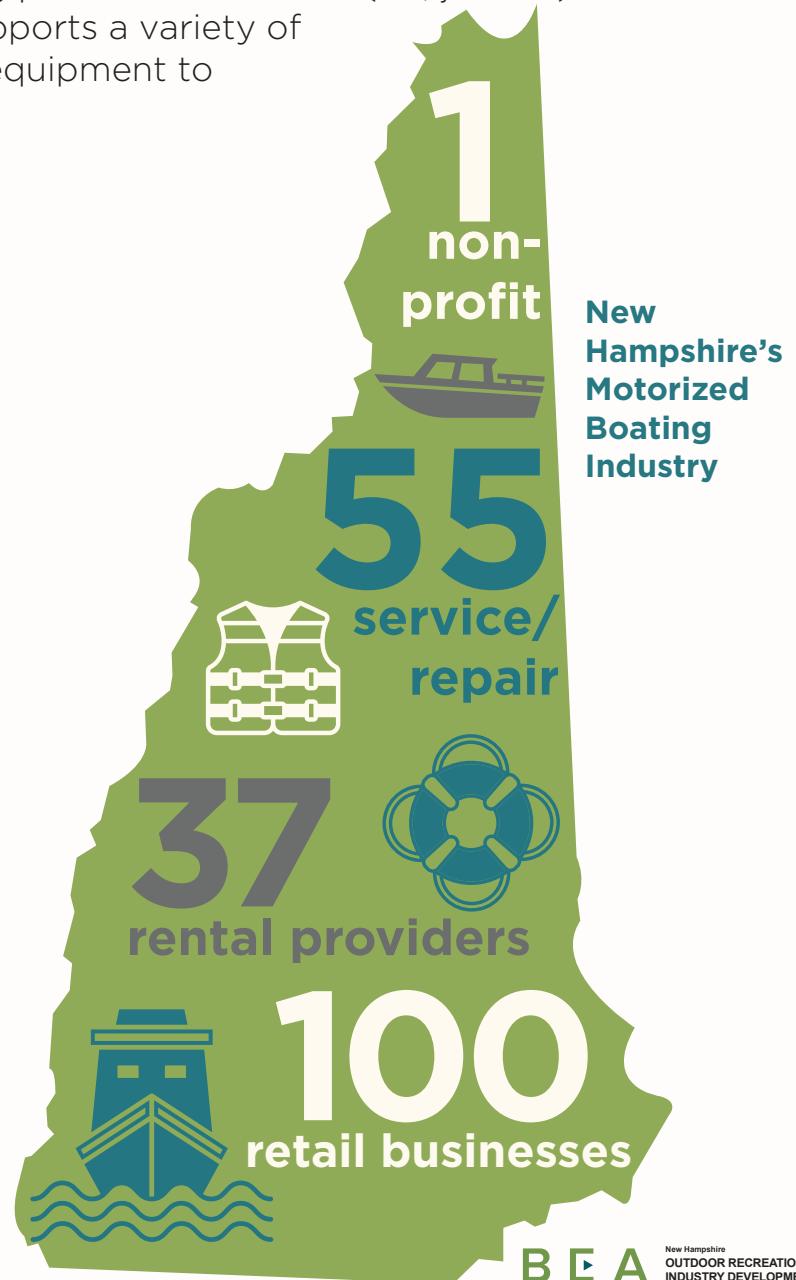
Key Takeaways

Opportunities for motorized boating are found in most areas of the state. The most well-known motorized boating opportunities in New Hampshire are found in the Lakes Region, the Lake Sunapee "Tri-Town" region, and along the Seacoast.

Motorized boating supports a variety of retail sale, service, rental, and charter businesses across the state.

A 2019 economic impact study from the National Marine Manufacturers Association found the recreational boating in New Hampshire generates \$1.2 billion in direct, indirect, and induced economic activity each year, supporting 6,800 jobs and 278 businesses.

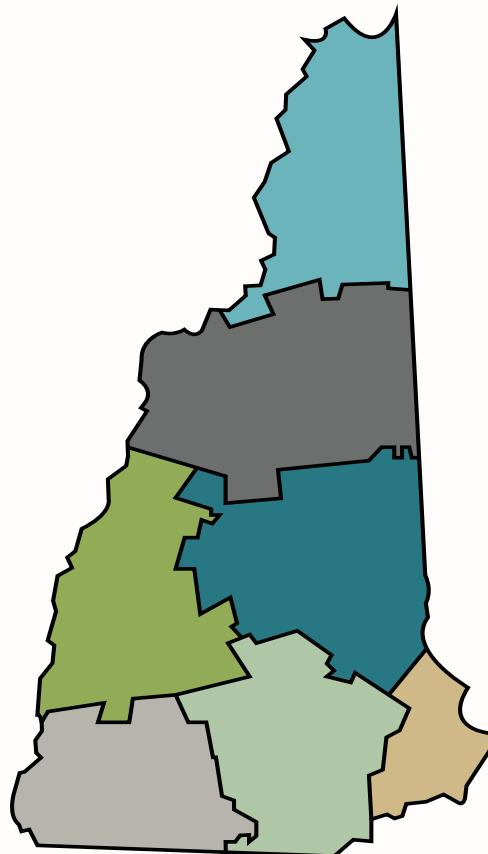
Environmental factors such as cyanobacteria and fluctuations in rainfall can significantly affect the viability and enjoyment of motorized boating.



MOTORIZED BOATING OVERVIEW

Geographic Availability

Opportunities for motorized boating are found in most areas of the state. The most well-known motorized boating opportunities in New Hampshire are found in the Lakes Region, the Lake Sunapee “Tri-Town” region, and along the Seacoast. The White Mountains and Great North Woods regions have a lower concentration of lakes suitable for motorized boating than other areas of the state but do include notable boating destinations such as the Moore Reservoir and Connecticut Lakes. There are smaller lakes peppered throughout much of central and southern New Hampshire that provide motorized boating opportunities as well.

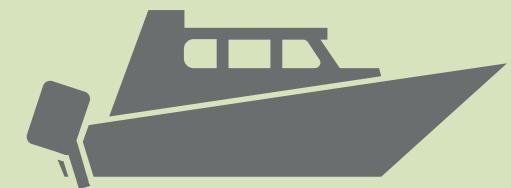


By law, public access is provided to all rivers, streams, tidal waters, and natural lakes over 10 acres in size in New Hampshire. Motorized boating typically occurs on larger waterbodies and is not necessarily permitted or feasible at all publicly accessible waterbodies. State laws and regulations include restrictions on the use and operation of motorized boats on various waterbodies, including restrictions on types of boats, speeds, times of day, and other rules. For example, jet skis and other “ski craft” are not permitted on waterbodies under 75 acres in size.

- Great North Woods
- White Mountains
- Dartmouth-Lake Sunapee
- Lakes Region
- Monadnock
- Merrimack Valley
- Seacoast

Participation

Boat registrations are helpful in tracking participation in motorized boating. In 2022, there were 104,688 registered boats in New Hampshire. A 2017 UNH Extension Nature Economy Brief reported that the average boat owner (nationwide) spends 28 days per year on the water, which suggests that there were approximately 3 million “boating days” in New Hampshire in 2022. The same brief noted that in 2017, nearly 20,000 boats were registered in New Hampshire by non-residents, correlating to approximately 1.2 million visitor days that year.



MOTORIZED BOATING BUSINESSES

Retail Stores

Motorized Boating Retail Sale Businesses by CEDR Region



Motorized Boating Retail Sale Businesses by Tourism Region

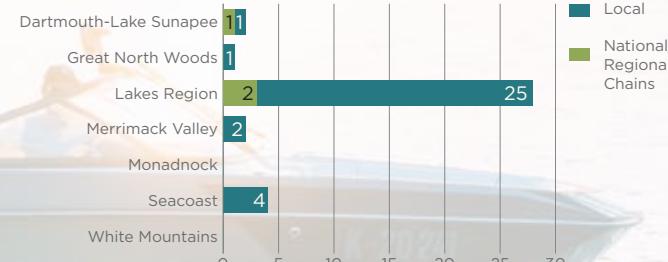


Rental Businesses

Motorized Boating Rentals by CEDR Region

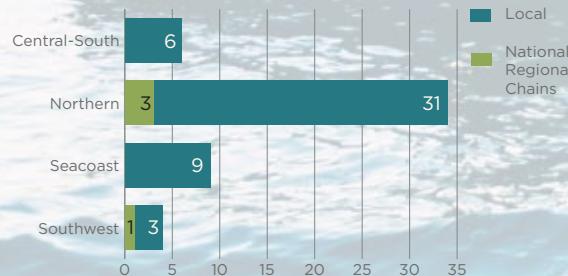


Motorized Boating Rentals by Tourism Region

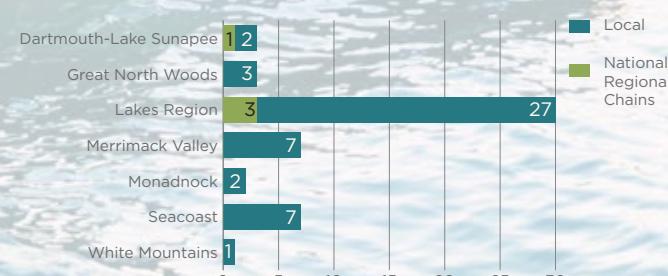


Service & Repair

Motorized Boating Service & Repair by CEDR Region



Motorized Boating Service & Repair by Tourism Region





INDUSTRY PULSE



Motorized boating in New Hampshire has traditionally been a family-based activity. “Boat families” have continued to bring new generations into the sport. There have been more efforts recently within the boating industry to attract new participants who did not grow up boating.



Demand for boat purchases surged during the COVID-19 pandemic and interest has remained strong.



Changes in technology have made it easier for boaters access to boat storage at marinas. Instead of renting a single slip for an entire season, marina operators are now using a valet model where multiple boats can use a single slip by coordinating with boat owners via smartphone applications. This provides greater flexibility for boat owners who no longer necessarily need a truck to haul their boat or space to store their boat on their property.



Staffing is a persistent challenge for marina operators. Marine tech jobs pay well but the industry has struggled to cultivate interest in these positions.



The health of the motorized boating industry is tied to the health of the waters – clean and safe water is imperative. Industry and state partners have been proactive in efforts to limit the spread of invasive species. However, reports of cyanobacteria in the state’s lakes continue to be a concern.

Motorized Boating Organizations

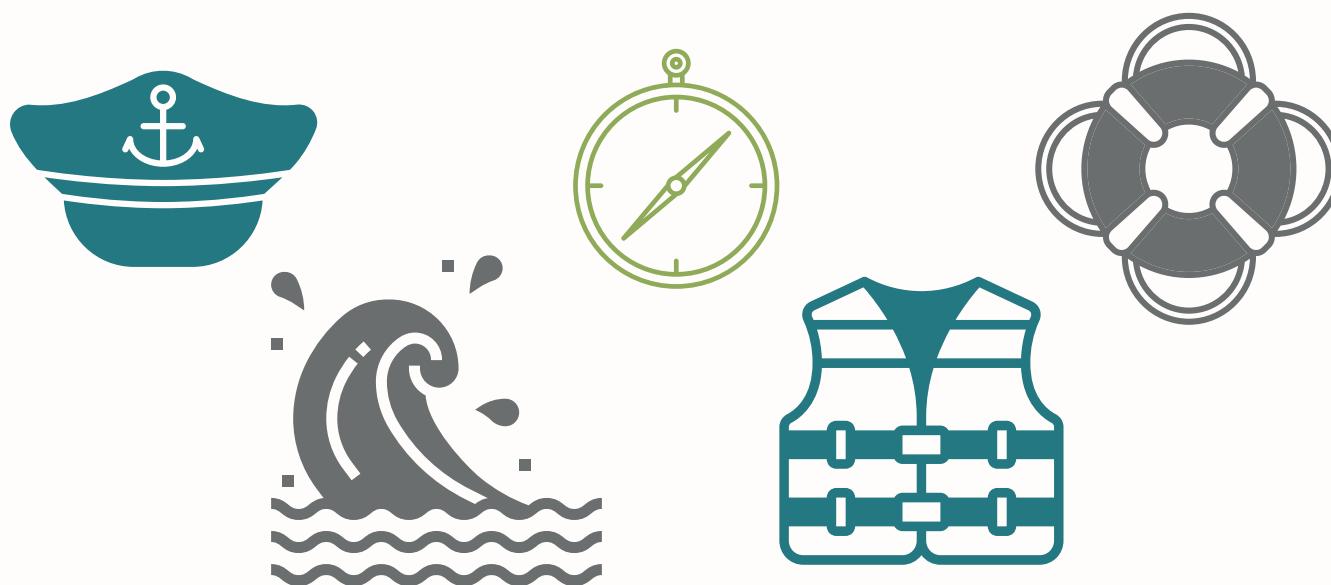
In addition to retail businesses and outfitters, there are various public, private, and non-profit organizations that support motorized water recreation in New Hampshire.

New Hampshire Marine Trades Association: NHMTA advocates for the marine trades in New Hampshire and is involved with efforts to promote boater education and safety as well the ecological health of navigable waterways in the state.

New Hampshire Department of Environmental Services: NHDES administers multiple programs aimed at promoting ecological health, such as the Clean Vessel Act program and Invasive Species program as well as monitoring water quality. NHDES also administers public water supply regulations that limit or restrict motorized boating activities on certain waters.

New Hampshire State Police: NHSP Marine Patrol enforces state boating laws on inland and marine waters and administers the state's Boater Education Program.

New Hampshire Department of Motor Vehicles: The DMV is responsible for issuing boat registrations and collecting registration fees. A portion of registration fees are allocated towards state lake restoration and preservation activities as well as search-and-rescue costs.

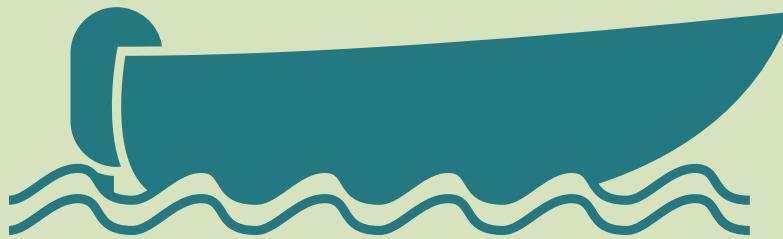


ECONOMIC IMPACT OF MOTORIZED BOATING

A 2019 economic impact study from the National Marine Manufacturers Association found that the recreational motorized boating in New Hampshire generates \$1.2 billion in direct, indirect, and induced economic activity each year, supporting 6,800 jobs and 278 businesses.

Data Needs

>> Demographics of participants



**2023 NEW HAMPSHIRE
OUTDOOR INDUSTRY INVENTORY
OHV/ ATV**



B E A
New Hampshire
OUTDOOR RECREATION
INDUSTRY DEVELOPMENT

EXECUTIVE SUMMARY

Off-Highway Recreational Vehicles (OHRVs) are defined in RSA 215-A:1 as “any mechanically propelled vehicle used for pleasure or recreational purposes running on rubber tires, tracks, or cushion of air and dependent on the ground or surface for travel, or other unimproved terrain whether covered by ice or snow or not, where the operator sits in or on the vehicle.” OHRVs include smaller trail bikes and all-terrain vehicles (ATVs) as well larger utility terrain vehicles (UTVs) and side-by-sides.

Key Takeaways

New Hampshire is a premier OHRV riding destination. Trail networks in the southern part of the state tend to be smaller and self-contained, while the Great North Woods features vast, interconnected networks.

As a result, northern New Hampshire is more of a destination for visitors, and features a variety of OHRV rental and guiding businesses.

OHRV trails require significant maintenance. Increased usage and costs of goods and services is a significant challenge for local OHRV clubs that perform upkeep of trail networks.

A 2021 Plymouth State University study found that OHRV use in New Hampshire is responsible for 1,689 direct jobs and \$165 million in direct annual economic output.





OHRV/ ATV OVERVIEW

Geographic Availability

There are at least 1,200 miles of public trail open to OHRVs in New Hampshire, spanning all regions of the state. A significant portion of these trails are located on private lands. The Great North Woods is a premier OHRV destination and features the Ride the Wilds trail network, which stretches from Gorham to Pittsburg. There are also concentrations of OHRV trails in southwestern and central New Hampshire. One of the largest gaps in the statewide OHRV network is the White Mountain National Forest, where federal wilderness rules restrict motorized trail use and steep terrain limits OHRV trail development. In addition to dedicated OHRV trails, OHRVs are permitted on approximately 64 miles of state-owned rail trails. Some municipalities also permit OHRVs to travel on unmaintained Class VI roads. Additionally, private landowners may have OHRV trails that are not open to the general public.

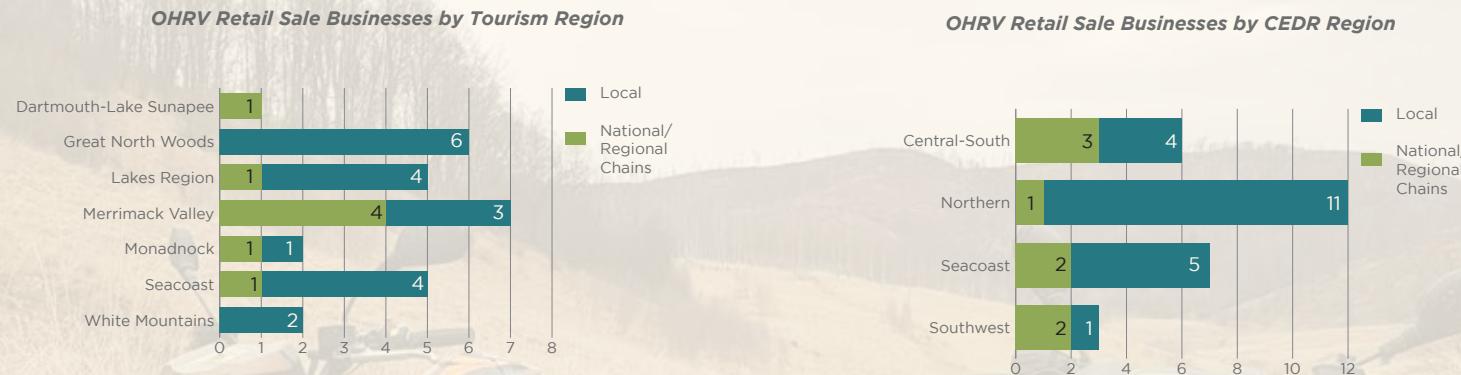
Not all OHRV trails are created equal. Some trails only permit ATVs under 50 inches wide, while others may permit larger UTVs and side-by-sides. There may also be weight restrictions on certain trails that limit the type of OHRV that can be used. OHRV travel along permitted rail trails tends to be a relatively mellow, lower-speed experience, whereas dedicated OHRV trails may support higher speeds and include rougher and more technically difficult trail features, such as stream crossings or steep hill climbs.

Participation

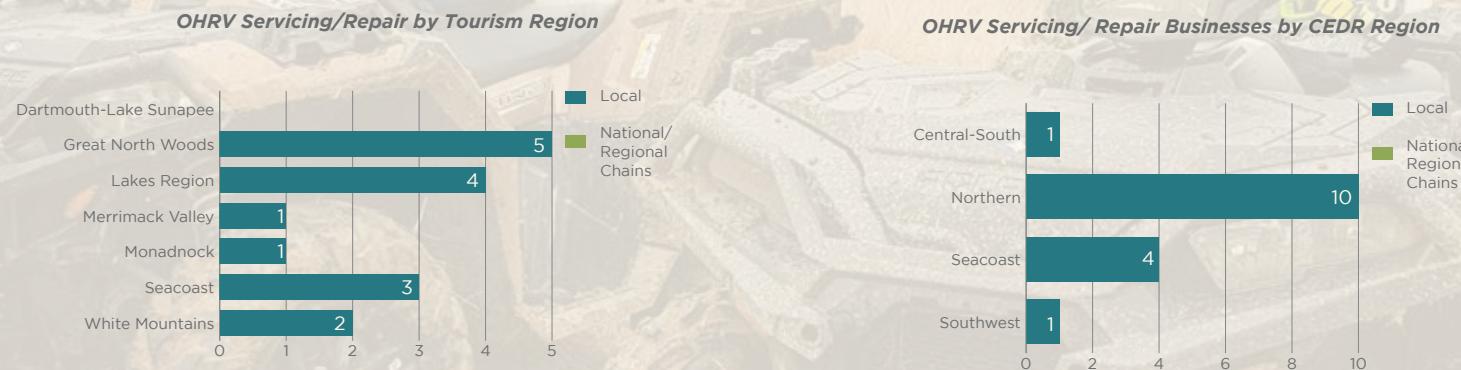
OHRV registrations provide a useful data point for tracking participation. Registrations have climbed steadily over the past decade, from just over 20,000 per year in 2011 to over 40,000 in 2020. Some of this growth has been driven by increases in out-of-state registration, which have increased from just under 5,000 in 2011 to over 15,000 in 2020. While registrations are helpful in understanding the number of people participating in OHRVing in New Hampshire, there is a lack of comprehensive data on how frequently OHRV registrations are using their OHRVs in New Hampshire or the volume of trail use across the state.

OHV/ ATV BUSINESSES

Retail Stores



Servicing and Repair



Rentals



OHRV Organizations

There are a variety of public, private, and non-profit organizations that support OHRV/ATV in New Hampshire.

NH Fish and Game: NH Fish and Game processes OHRV registrations, provides OHRV safety education courses, enforces OHRV operation regulations, and conducts search-and-rescue operations.

NH Bureau of Trails: The Trails Bureau administers the state's Grant-in-Aid program, providing funding for trail construction and maintenance with revenues from registration fees. The Bureau also administers the federal Recreation Trails Grant program and performs trail maintenance on state-owned trails.

NH State Parks: OHRV use is permitted in Jericho Mountain State and Pisgah State Park.

NH Off-Highway Vehicle Association: NHOHVA promotes statewide coordination between local trail clubs and state agencies, support landowner relations, promotes OHRV rider education and safety, and performs legislative advocacy.

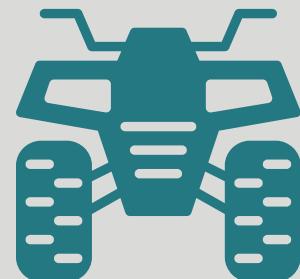
Local OHRV Clubs: 22 local OHRV clubs help maintain over 1,000 miles of trail, including coordination with private landowners that host OHRV trails.



OHRV Guides

In addition to the brick-and-mortar businesses on the prior page, there are at least eight operators providing OHRV/ATV tours in all in northern New Hampshire.

OHRV guide service open up the sport to residents and visitors who do not own their own vehicles or lack experience operating vehicles.





INDUSTRY PULSE

- OHRV club membership has been increasing steadily in recent years, with a surge during the COVID-19 pandemic and a slight decline afterwards. Between 2017 and 2022, the number of OHRV clubs in New Hampshire increased from 17 to 22, and total club memberships increased from 7,000 to 10,000.
- Maintenance of OHRV trails involves significant work and expense. NHOHVA's club membership program has resulted in over \$1 million in additional maintenance funds being made available to clubs; however, there are still significant funding needs for trail maintenance. There have been significant increases in costs of goods and services, particularly for bridge and culvert replacement projects.
- Trail access is a persistent challenge for OHRV trail networks. Some municipalities permit OHRVs to use local roadways to connect to trails; however, concerns about behaviors, noise, and road damage have led municipalities to rescind roadway access. OHRV clubs have been proactive in educating members about respectful road and trail use; however, these messaging efforts may not reach all users. A primary focus of some OHRV clubs is identifying alternative trail corridors that keep users off of local roads.

ECONOMIC IMPACT OF OHRV/ ATV

A 2021 Plymouth State University study found that OHRV use in New Hampshire is responsible for 1,689 direct jobs and \$165 million in direct annual economic output.

Factoring in indirect and induced economic affects, OHRV use supports 2,488 jobs, \$298 million in economic output, and \$22 million in tax revenue. In addition to supporting jobs in retail, OHRV use directly supports over 1,000 jobs in the restaurant and hospitality sector.

Data Needs

- >> Updated data on participation, including frequency and demographic breakdowns
- >> Trail Usage Data



A photograph of a man and a dog in a yellow kayak on a lake. The man is seated at the stern, holding a paddle with a yellow blade. The dog is seated in front of him, also holding a paddle. They are surrounded by ripples on the water, with a large, dark forested hillside in the background under a clear sky.

2023
NEW HAMPSHIRE OUTDOOR
INDUSTRY INVENTORY
PADDLE SPORTS

EXECUTIVE SUMMARY

There are a variety of outdoor recreation activities that take place on New Hampshire's inland waterbodies and coastal areas. In areas of flat water (i.e., lakes and ponds), canoeing and kayaking have long been popular activities, with stand-up paddleboarding and wind/kite surfing increasing in popularity in recent years. There are also numerous opportunities for whitewater canoeing, kayaking, and rafting on different rivers in the state, as well as sea kayaking in coastal areas. All of these waterbodies provide opportunities for swimming as well. A separate summary has been prepared for surfing.

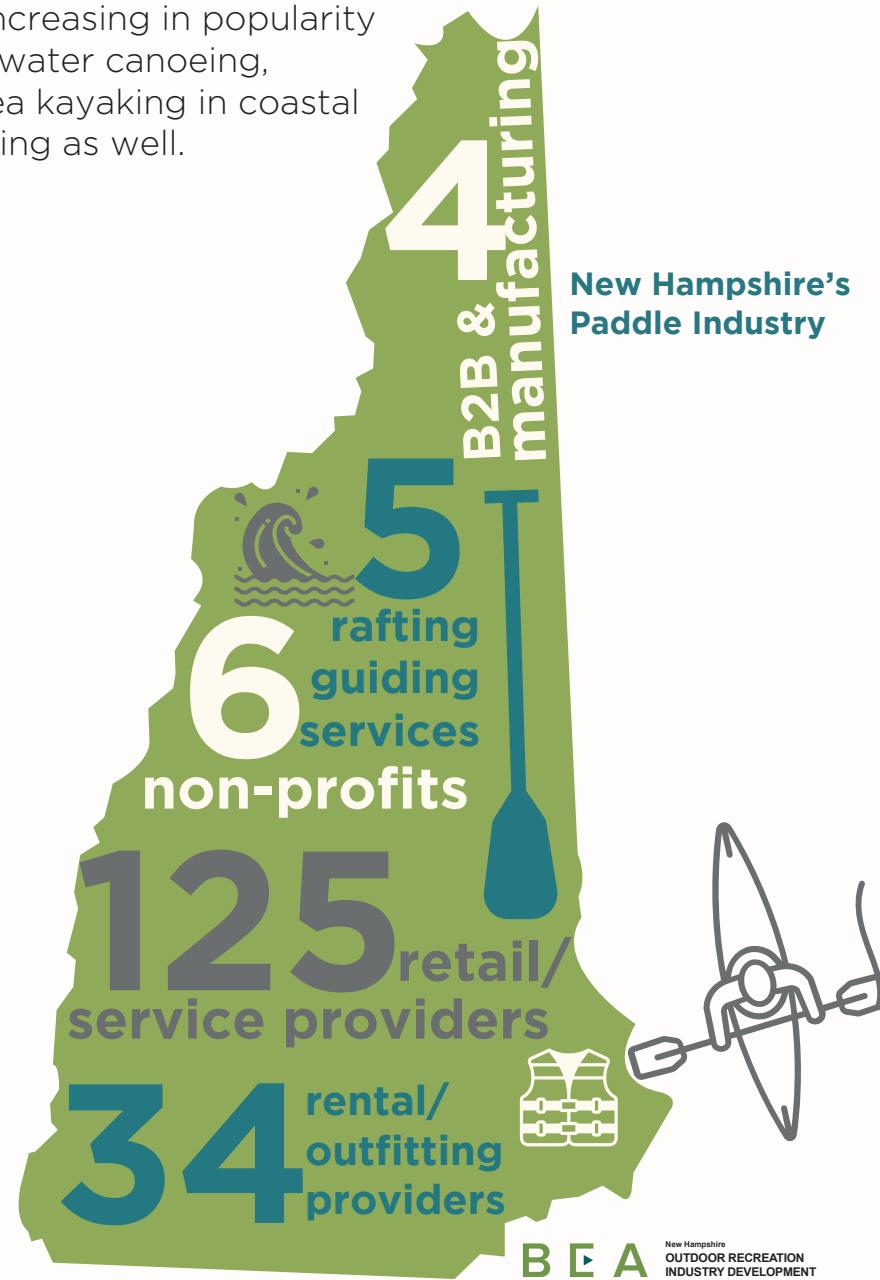
Key Takeaways

Environmental factors such as cyanobacteria and fluctuations in snowpack and rainfall can significantly affect the viability and enjoyment of paddle and water sports.

Paddle and water sports in New Hampshire benefit from the state's ample lakes, ponds, rivers, and streams – as well as state laws requiring public access to most waterbodies.

Some New Hampshire communities, such as Franklin, have started to see the economic value in providing recreational access to “urban rivers” passing through downtown areas and are working to improve river access and use.

Paddle and water sport opportunities support a variety of retail sale, rental, and guiding businesses across the state.



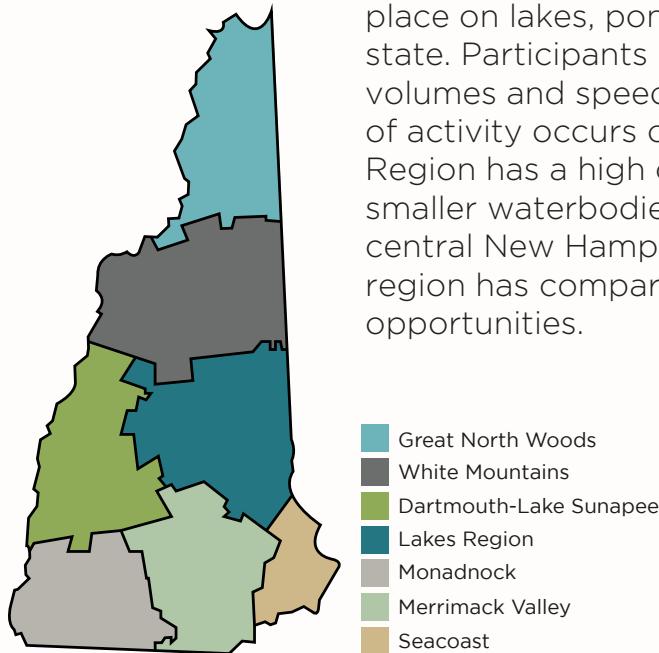
PADDLE SPORTS OVERVIEW

Geographic Availability

By law, public access is provided to all rivers, streams, tidal waters, and natural lakes over 10 acres in size in New Hampshire. State records indicate that there are over 980 formal public access sites to waterbodies in the state. There is also 18 miles of ocean coastline in New Hampshire, which features 13 public beaches and access points.

Whitewater sports typically occur on larger rivers and streams that have adequate flow and exciting rapids. Certain rivers, such as the Androscoggin and Saco Rivers, typically have adequate flow to support whitewater sports throughout the warmer months, while other rivers are reliant on annual high flows in the spring to support whitewater activity. Whitewater difficulty ranges from mellow Class II rapids to expert-only Class V+ runs. Franklin, NH is home to New England's first whitewater park, located on the Winnipesaukee River in downtown. The park features built in-stream whitewater features and there are plans to incorporate viewing areas and additional access points in the future.

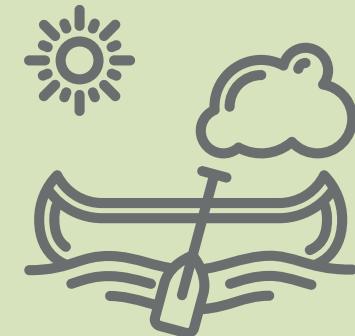
Flat water canoeing, kayaking and paddleboarding take place on lakes, ponds, and mellow streams across the state. Participants often seek out waterbodies with lower volumes and speeds of motorized boats, although plenty of activity occurs on shared waterbodies. The Lakes Region has a high concentration of large waterbodies; smaller waterbodies are scattered through southern and central New Hampshire as well. The White Mountains region has comparatively few flatwater paddle sport opportunities.



With New Hampshire's public access laws, swimming opportunities are present at waterbodies all over the state. Swimming can entail anything from open water distance swimming to splashing around at a local swimming hole.

Participation

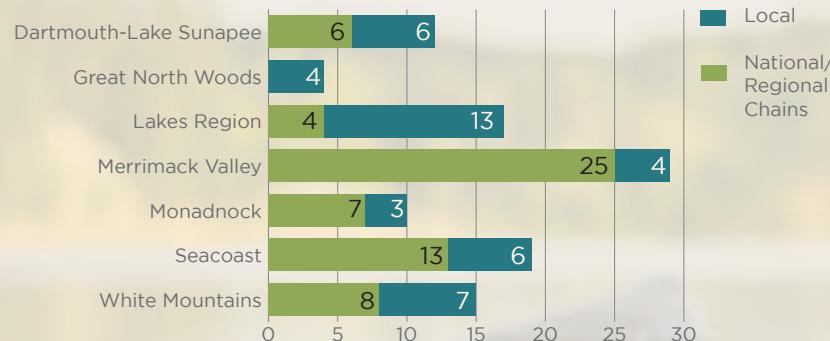
Tracking participation in paddle sports and other non-motorized water recreation activities is challenging due to the dispersed nature of these activities. Canoes and kayaks are not required to be registered and there are no entry fees for public waters in New Hampshire, and there are no rivers in the state that require whitewater outfitters to obtain permits. While not representative of all freshwater swimming opportunities in the state, a study by UNH Extension estimated that there were a total of 436,434 out-of-state visitor days to NH State Parks with freshwater swimming opportunities in 2017.



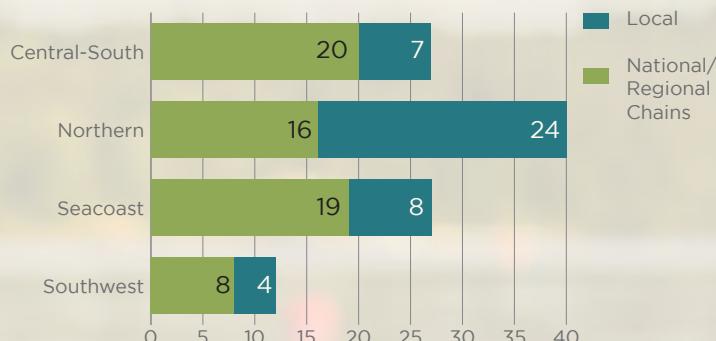
PADDLE SPORTS BUSINESSES

Retail Stores

Paddle Sports Retail Sale Businesses by Tourism Region

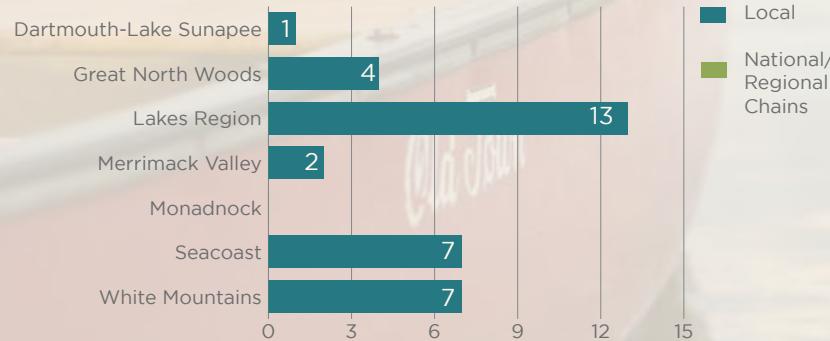


Paddle Sports Retail Sale Businesses by CEDR Region

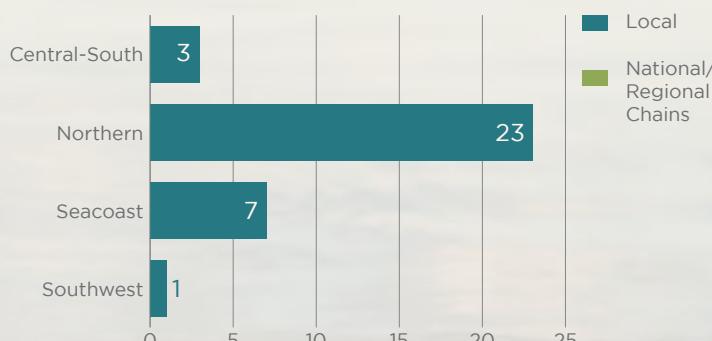


Rentals

Paddle Sports Rentals by Tourism Region



Paddle Sports Rentals by CEDR Region



In addition to these retail and service businesses, there are at least five whitewater rafting guides operating in New Hampshire

A photograph of a young boy standing on a white paddleboard, facing away from the camera. He is wearing a yellow t-shirt, white swim trunks with a colorful graphic, and a green life vest. He is holding a black paddle and is on a lake with sunlight reflecting off the water. The background shows trees and foliage.

INDUSTRY PULSE

Interest in paddle sports surged during the COVID-19 pandemic, and has remained relatively high in the time since. Flatwater paddling on lakes and ponds is a very accessible activity for individuals that are newer to outdoor recreation. There has also been increased interest in whitewater sports, particularly amongst younger participants.

Many historic downtown and village areas in New Hampshire have rivers and streams running through them. For decades, these were not used as recreational assets due to water quality issues and/or a lack of access points. Some communities, such as Franklin, have started to see the economic value in providing recreational access to these “urban rivers” and are working to improve river access and use.

Paddle and water sports are more affected by environmental factors than other many other outdoor recreation activities. Water quality issues such as cyanobacteria have a major effect on canoe and kayak rental operators, and the viability of many whitewater runs depends significantly on climactic factors such as snowpack and rainfall patterns.

Public access to waterbodies is critical for the viability of paddle and water sports and associated businesses. While state law requires there to be public access to most waterbodies, this does not prevent the closure of individual access points, which can have negative affects on public use and business operations.

Paddle Sports Organizations

In addition to retail businesses and outfitters, there are various public, private, and non-profit organizations that support paddle sports and non-motorized water recreation in New Hampshire.

New Hampshire State Police: NHSP Marine Patrol enforces state boating laws on inland and marine waters and administers the state's Boater Education Program.

New Hampshire Department of Environmental Services: NHDES administers multiple programs aimed at promoting ecological health of waterways, such as the Clean Vessel Act program and Invasive Species program as well as monitoring water quality. NHDES also operates the New Hampshire Rivers Management and Protection Program (RMPP), which provides additional river corridor management attention to 19 designated rivers across the state. Corridor planning for designated rivers includes water quality and shoreline protection considerations as well as recreational access and use. For each designated river in the RMPP, there is an assigned Local River Management Advisory Committee (LAC). LACs are volunteer committees that may take on a variety of responsibilities related to river management, such as adopting a river corridor management plan, reviewing permit applications for proposed development within the river corridor, and coordinating river cleanup and water quality monitoring initiatives.

American Canoe Association – New Hampshire Chapter: ACA-NH offers paddling safety and skill building courses, coordinates paddling events and competitions, and promotes ecological stewardship of waterways.

Mill City Park: Located in downtown Franklin, Mill City Park is a non-profit dedicated to implementing New England's first whitewater park. When completed, the park will include in-stream whitewater features and viewing platforms, as well as additional park features such pedestrian and bicycle paths and event space.

Local Clubs: Local paddling clubs, such as the Merrimack Valley Paddlers, organize various paddling outings, provide paddling safety education and skills training, and coordinate gear sharing.



ECONOMIC IMPACT OF PADDLE SPORTS

To-date, there have been no statewide studies on the economic impact of paddle sports in New Hampshire. In 2018, the NH Department of Business and Economic Affairs estimated that the build out of Mill City Park in Franklin (New England's first whitewater park) would generate nearly \$7 million in new visitor spending per year.

A UNH Extension study estimated that visitors who came to swim in New Hampshire's freshwater state parks during the summer of 2017 contributed approximately \$40 million to the state's economy.

Data Needs

- >> Economic impact of paddle sports
- >> Participation in paddle sports, including demographic breakdowns



**2023 NEW HAMPSHIRE
OUTDOOR INDUSTRY INVENTORY
ROAD & GRAVEL
BIKING**

B E A

New Hampshire
OUTDOOR RECREATION
INDUSTRY DEVELOPMENT

EXECUTIVE SUMMARY

Road and gravel biking are established outdoor recreation activities in New Hampshire amongst residents and visitors who seek out the state's quiet, scenic roads. Road biking can entail anything from a short loop around a neighborhood to full-day or multi-day tours covering hundreds of miles. Traditionally, road biking has been largely confined paved roads. In recent years, gravel biking (i.e., biking on dirt/gravel roads) has gained popularity, with manufacturers offering dedicated gravel bikes with wider tires that are more suitable for off-pavement excursions.

Key Takeaways

Road and gravel biking supporting a large mix of retail, service, and rental businesses throughout New Hampshire.

In addition to biking on paved roads, New Hampshire's vast unpaved road network supports the burgeoning sport of gravel biking, which has increased in popularity in recent years.

A 2020 economic impact analysis found that bicycle shops in New Hampshire supported **200 direct jobs and generated \$29.7 million in direct sales**. The same analysis estimated that approximately 200,000 visitors came to New Hampshire for bicycle tourism, resulting in \$28 million in direct spending and supporting 269 direct jobs.



BIKING OVERVIEW

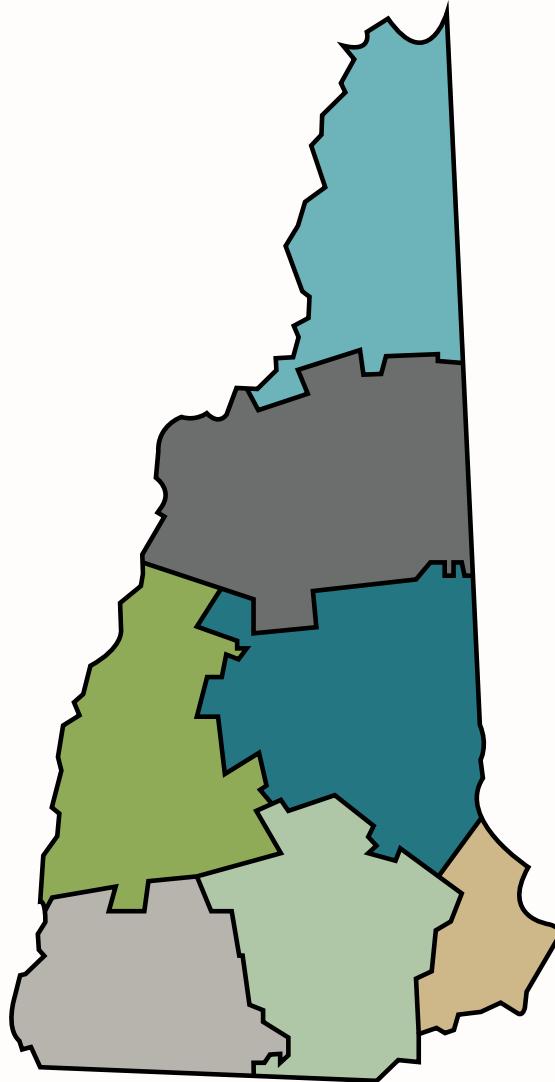
Participation

Road and gravel biking is a dispersed outdoor recreation activity, making it difficult to track participation. According to the 2022 US Bicycling Participation Study, approximately one-third of Americans (34%) rode a bicycle at least once during the year. Of these Americans who rode a bicycle at least once, the median bicyclist rode 13 times during the course of a year.

Within the sport, gravel biking is steadily increasing in popularity. Worldwide, the sale of gravel-specific bikes increased by 100% from 2019 to 2021 according to an NPD Group report. The appeal of gravel biking includes riding on roads with lower traffic volumes and speeds and accessing rural, scenic terrain.

Additionally, the popularity of electric bikes (e-bikes) has grown substantially in recent years. E-bike sales in the US increased from 325,000 in 2018 to 1.1 million in 2022 according to the Light Electric Vehicle Association. E-bikes have the potential to broaden participation in bicycling due since they require less physical demand than typical bicycles.





Geographic Availability

Road biking can technically occur anywhere there are roads or bike paths. Bicyclists tend to seek out “lower stress” roadways with lower traffic volumes and speeds, although experienced bicyclists may be comfortable riding with heavier traffic. In New Hampshire, over one-third (34%) of roads are unpaved, providing opportunities for gravel biking. This includes approximately 1,500 miles of unmaintained Class VI roads, some of which are passable to more adventurous gravel bicyclists. Gravel roads can be found in most regions of the state, typically in more rural areas.

There are also approximately 380 miles of rail trails in New Hampshire (trails that use former railroad beds) that provide a mix of paved and smooth gravel surfaces for bicyclists. The majority of these trail corridors are owned by the State. Rail trails can be found all over New Hampshire but are primarily concentrated in the southern and central regions of the state. Given that rail trails follow historical rail corridors, many rail trails can be accessed directly from downtown and village areas, providing safe and enjoyable bicycling opportunities for residents and visitors.

There are also opportunities for overnight bicycle touring (also known as bikepacking) along established routes in New Hampshire. The 83-mile Cross NH Adventure Trail follows a series of rail trails and back roads from Shelburne to Haverhill. The recently-established Eastern Divide Trail (a 5,950-mile mixed surface bikepacking route from Nova Scotia to Florida) passes through the White Mountains region, and the East Coast Greenway (a paved touring route from Maine to Florida) passes through the Seacoast region.

- Great North Woods
- White Mountains
- Dartmouth-Lake Sunapee
- Lakes Region
- Monadnock
- Merrimack Valley
- Seacoast

BIKING BUSINESSES

Retail Stores



Servicing and Repair



Rentals



Road & Gravel Biking Organizations

There are a variety of public, private, and non-profit organizations that support road and gravel biking in New Hampshire.

NH Department of Transportation: NHDOT is responsible for maintaining state-owned roadways, setting speed limits, and implementing state infrastructure improvement projects that support bicycling.

NH Bureau of Trails: The Bureau of Trails assists with maintenance of certain state-owned rail trails.

Cycling Clubs: Local cycling clubs around the state organize group bicycle rides and promote bicycle safety and education.

NH Rail Trails Coalition/Local Rail Trail Clubs: NHRTC promotes the development, maintenance, and use of rail trails in New Hampshire through advocacy and education. Local clubs help with the construction and maintenance of rail trails in their regions.

Bike-Walk Alliance of NH: BWANH performs legislative advocacy on behalf of the bicycling community, provides a variety of educational offerings on bicycle safety, and provides administrative support to a number of local bicycling clubs and bicycle advocacy organizations.





INDUSTRY PULSE

 Workforce development has been a major focus for bicycle shops. There have been new programs established at high schools and vocational schools aimed at providing training for bicycle mechanics.

 Demand for bicycles surged during the COVID-19 pandemic, with many shops struggling to maintain inventory. Demand has cooled but remains high relative to prior years.

 Bicyclists have expressed increasing safety concerns in recent years, particularly in regards to increasing vehicle sizes and distracted driving. Part of the increased interest in gravel biking is being driven by bicyclists seeking out lower traffic roads.

 A significant amount of maintenance of state-owned rail trails in New Hampshire is performed by local volunteer organizations. State maintenance is typically limited to rail trails that permit motorized use, funded by OHV and snowmobile registration fees.

 While there is significant interest around the state for providing more safe bicycling opportunities (e.g., new bicycle paths, improving bicyclist safety along roadways), there are limited funding and resources available to implement these improvements. Available grant funding sources are highly competitive within the state.

ECONOMIC IMPACT STUDIES

A 2020 economic impact analysis conducted for the *New Hampshire Statewide Pedestrian & Bicycle Transportation Plan* found that bicycle shops in New Hampshire supported 200 direct jobs and generated \$29.7 million in direct sales. The same analysis estimated that approximately 200,000 visitors came to New Hampshire for bicycle tourism, resulting in \$28 million in direct spending and supporting 269 direct jobs. Including indirect impacts, bicycle tourism supported nearly 400 jobs and \$43 million in sales activity. It should be noted that these statistics are inclusive of mountain biking as well as road and gravel biking.

Data Needs

- >> Updated data on participation, including frequency and demographic breakdowns
- >> Updated economic impact data





**2023 NEW HAMPSHIRE
OUTDOOR INDUSTRY INVENTORY
SKI & SNOWBOARD**

B E A
New Hampshire
OUTDOOR RECREATION
INDUSTRY DEVELOPMENT

EXECUTIVE SUMMARY

Alpine skiing and snowboarding occurs on mountainous terrain with long downhill runs. There are multiple varieties of alpine skiing and snowboarding in New Hampshire. Most alpine skiing and riding occurs at developed ski areas and resorts, including adaptive skiing and riding. Backcountry alpine skiing and riding (i.e., that which occurs outside of developed ski areas in managed or wilderness backcountry zones) has increased in popularity in New Hampshire as well.

Nordic skiing (or cross-country skiing) typically occurs on flat or rolling terrain. Nordic skiing takes place on groomed trails as well as on natural surface trails, fields, and in forests.

Key Takeaways

Participation in alpine skiing and riding at developed ski areas **has remained steady** in recent years, whereas participation in Nordic skiing has declined slightly. Interest in backcountry skiing is growing.

A 2019 Plymouth State University study prepared for Ski New Hampshire estimated that ski area visitors during the 2017/2018 winter season generated \$384.2 million in visitor spending in New Hampshire, resulting in a total of **\$507.8 million in total economic contributions** and supporting 7,485 jobs.

In addition to ski area operators, the skiing and riding industry in New Hampshire is supported by a **large network of non-profit organizations** (including non-profit operated small ski areas), with services varying from adaptive programs, management of backcountry terrain, youth racing and programming, and trail grooming .

There is optimism that the **ski industry in New Hampshire will remain strong**, with developed ski areas making significant investments in chairlift operations, snowmaking, and base area facilities in recent years.



SKIING OVERVIEW

Participation

Developed Ski & Ride Areas: In the 2021-2022 winter season there were 1,997,185 visits to alpine skiing and riding areas in New Hampshire, according to Ski NH. This was a slight decline (-4%) from the prior 10-year average, with warm and rainy weather contributing to a relatively short winter season.

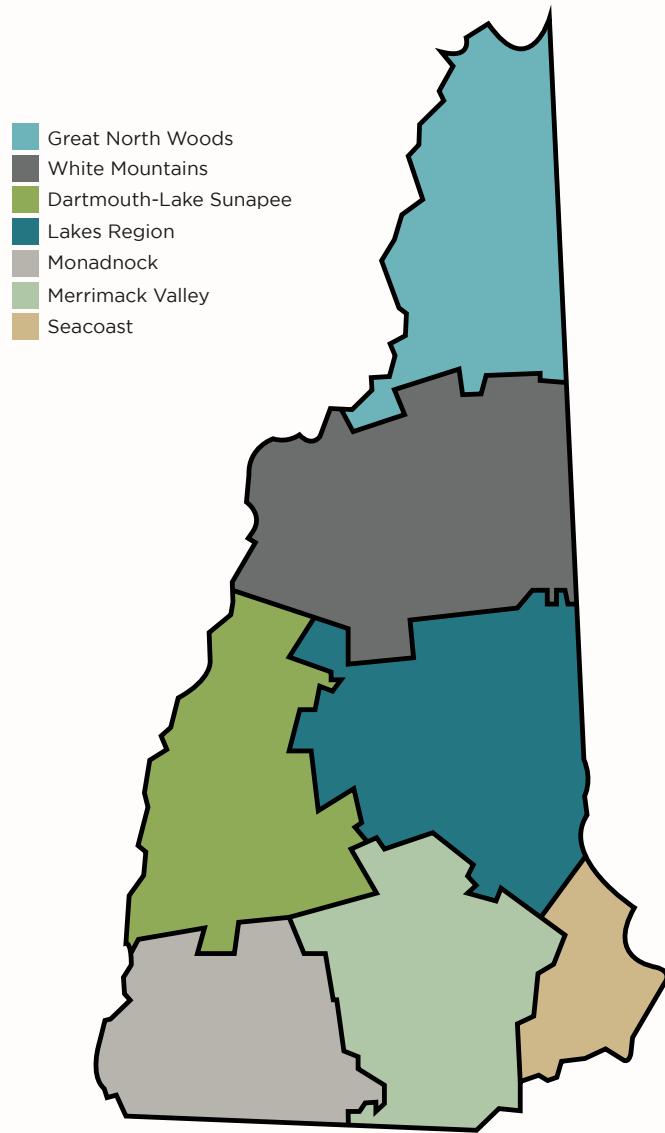
Nationwide statistics from the National Ski Areas Association indicates that snowboarders account for approximately one-in-four visits to ski areas, and that there was a bump in the number of participants in skiing and riding during the COVID-19 pandemic. In the 2021-2022 season, nearly two-thirds of participants identified as male (63%) and the vast majority (89%) identified as white.

Backcountry Skiing & Riding: Tracking exact participation in backcountry skiing and riding is not possible. A 2019 Granite Backcountry Alliance study found that there were over 9,000 visits to three gladed backcountry ski zones between December 2018 and 2019. There are also some indicators that speak to the growth of the sport. Most ski and ride retail shops in New Hampshire now carry alpine touring equipment, a major change from prior decades.

Nordic Skiing: In the 2021-2022 winter season there were 114,262 visits to fee-based Nordic ski centers, according to Ski NH; this represents a 10% decline from the prior 10-year average, with warm and rainy weather contributing to a relatively short winter season. Many Nordic ski centers are looking to add snowmaking infrastructure to extend the Nordic ski season and improve the conditions.



SKIING OVERVIEW

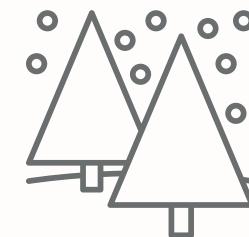
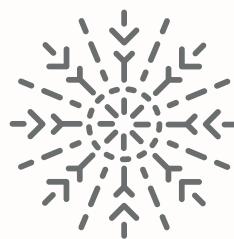


Geographic Availability

There are 22 developed alpine skiing and riding areas in New Hampshire. The White Mountains region is the most well-known area for alpine skiing and riding and hosts 9 developed skiing and riding areas. The Lakes Region and Dartmouth-Lake Sunapee Region also contain multiple developed skiing and riding areas.

Backcountry alpine skiing and riding can technically occur in any location where there is suitable terrain and snow. However, there are areas that are well-known and popular for backcountry skiing and riding, such as Tuckerman Ravine on Mount Washington and gladed areas managed by the Granite Backcountry Alliance (known as "Graniteland").

There are 24 developed Nordic ski areas that offer fee-based access to groomed Nordic terrain. Additional groomed Nordic ski opportunities can be found across the state on trails maintained by local organizations and volunteers. Nordic skiing on ungroomed trails takes place in state parks, town forests, and other public and private lands across the state.



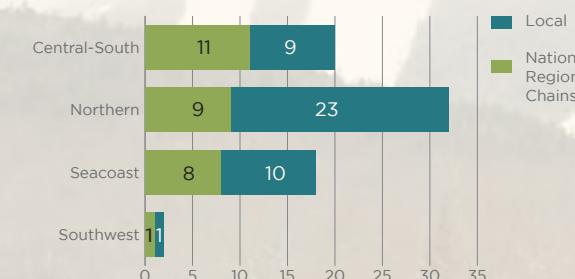
SKI & SNOWBOARD BUSINESSES - ALPINE

Retail Stores

Downhill Ski Retail Sale Businesses by Tourism Region



Downhill Ski Retail Sale Businesses by CEDR Region

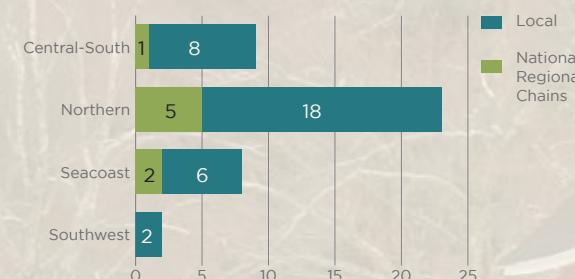


Servicing and Repair

Downhill Ski Servicing/Repair by Tourism Region



Downhill Ski Servicing/ Repair Businesses by CEDR Region

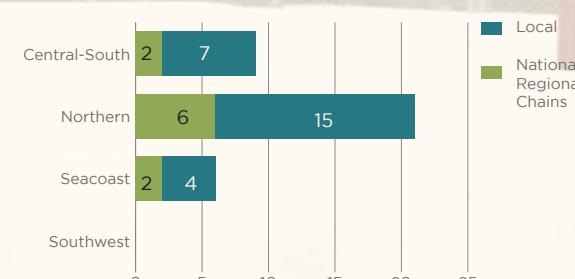


Rentals

Downhill Ski Rental Services by Tourism Region

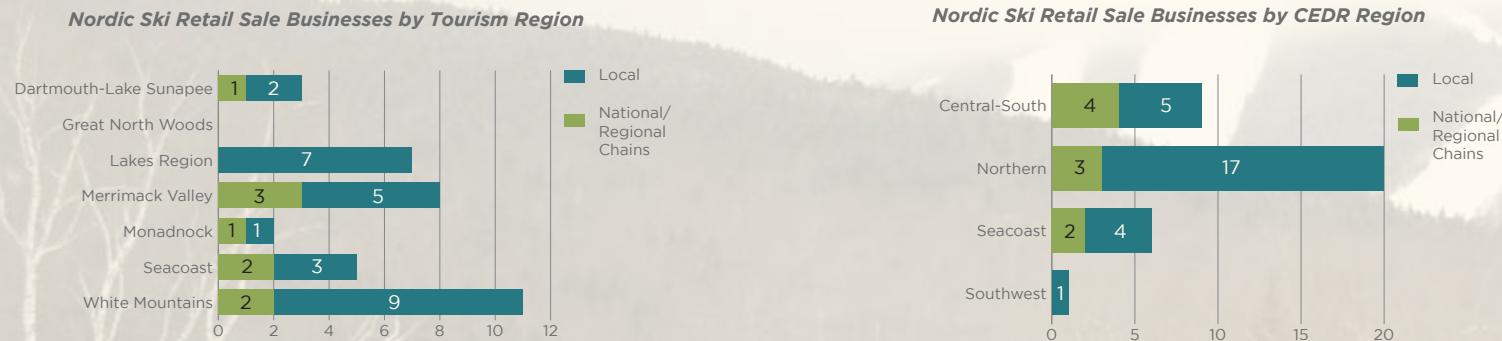


Downhill Ski Rentals by CEDR Region



SKI & SNOWBOARD BUSINESSES - NORDIC

Retail Stores



Servicing and Repair



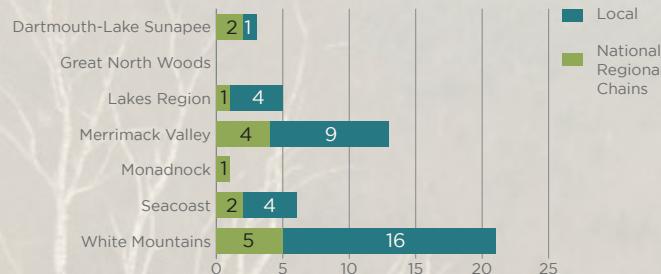
Rentals



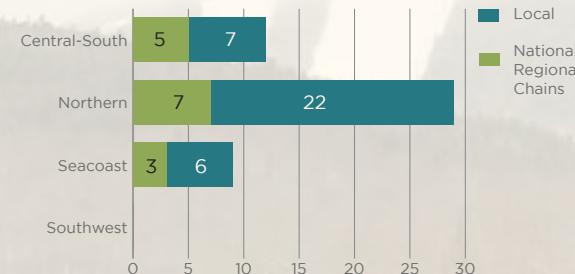
SKI & SNOWBOARD BUSINESSES - BACKCOUNTRY

Retail Stores

Backcountry Ski Retail Sale Businesses by Tourism Region

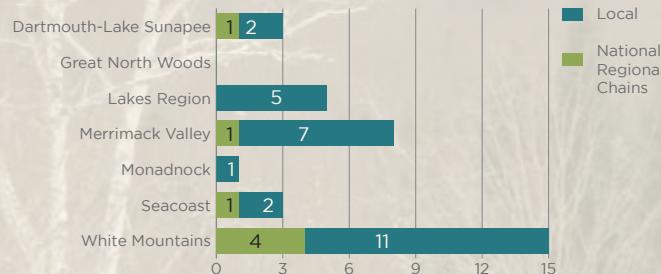


Backcountry Ski Retail Sale Businesses by CEDR Region

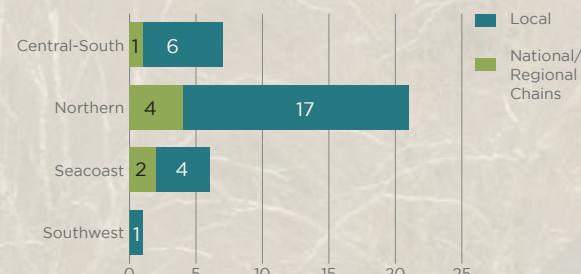


Servicing and Repair

Backcountry Ski Servicing/Repair by Tourism Region

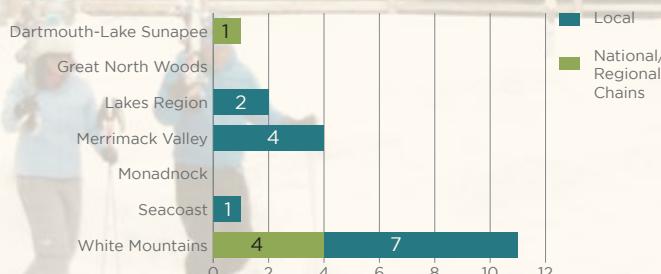


Backcountry Ski Servicing/Repair Businesses by CEDR Region

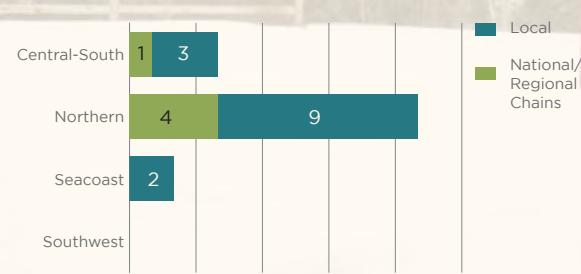


Rentals

Backcountry Ski Rental Services by Tourism Region



Backcountry Ski Rentals by CEDR Region





Skiing Organizations

In addition to ski areas, there are many non-profit partners that support participation in skiing in New Hampshire.

Ski New Hampshire is the trade association for alpine and Nordic ski areas in New Hampshire. Ski NH facilitates industry coordination, advocacy, promotion and education amongst industry members.

Adaptive Skiing and Riding: there are a number of organizations that provide equipment, training, and assistance for skiers that use adaptive equipment.

Backcountry: The Granite Backcountry Alliance works with public and private landowners to establish and manage backcountry ski zones, primarily in the White Mountains region. The Mount Washington Valley Avalanche Center provides avalanche forecasts for avalanche-prone areas in the Presidential Range that are frequented by backcountry skiers.

Racing & Programming: the New Hampshire Alpine Racing Association coordinates and supports participation in alpine ski and snowboard races around the state, while the New England Nordic Ski Association supports local Nordic skiing clubs and race events.

Clubs: there are a variety of club organizations that support various aspects of skiing and riding in New Hampshire, from grooming local Nordic ski trails to providing youth coaching and programming, to private ski clubs that share housing and other resources.



INDUSTRY PULSE

Overall, there is a feeling that the ski industry in New Hampshire is healthy and growing. There is significant ongoing investment in lift infrastructure and base area facilities. There was a bump in participation in skiing and riding during the COVID-19 pandemic; ski areas are also seeing an increased diversity of participants.

There has been a long-term trend towards corporate consolidation in the ski industry, which is also occurring in New Hampshire. Small, independent ski areas are having trouble competing with pass prices from larger conglomerates.

Housing for ski area workforce has been a persistent challenge. Ski area managers spend significant time and resources to secure housing for seasonal staff.

Climate change is a threat to the future viability of ski area operations. Ski areas have been leaders in developing climate-friendly initiatives and sustainable operations plans. There has been an increased focus on providing non-snow-dependent activities, such as downhill mountain biking.

There has been an increased level of collaboration within the ski industry in New Hampshire on initiatives such as workforce development, training, and sharing resources.

Interest in alpine touring (including backcountry touring and uphill skiing at ski areas) continues to grow.

ECONOMIC IMPACT STUDIES

Economic Impact of Developed Ski Areas

A 2019 Plymouth State University study prepared for Ski New Hampshire estimated that ski area visitors during 2017/2018 winter season generated \$384.2 million in visitor spending in New Hampshire, resulting in a total of \$507.8 million in total economic contributions and supporting 7,485 jobs. These figures included both alpine and Nordic ski areas. Tickets/admissions were estimated to account for less than one-third of visitor spending (31%), with restaurants (20%), travel costs (19%), lodging (15%) and grocery stores (11%) also experiencing significant spending related to ski area visitation. This economic activity was estimated to result in \$64.2 million in tax and fee revenue to state and local governments.

Economic Impact of Backcountry Skiing & Riding

A 2019 Granite Backcountry Alliance (GBA) study found that visits to three GBA-managed backcountry zones between December 2018 and April 2019 resulted in \$954,000 in sales activity and \$121,000 in local tax revenue.

Data Needs

>> Demographic breakdown of skiing and riding participants in New Hampshire

>> Overall participation and economic impact of backcountry skiing and riding

>> Impact of changes in climate on ski area operations



2023
NEW HAMPSHIRE OUTDOOR
INDUSTRY INVENTORY
SNOWMOBILING



B E A

New Hampshire
OUTDOOR RECREATION
INDUSTRY DEVELOPMENT

EXECUTIVE SUMMARY

New Hampshire has vast snowmobiling opportunities across over 7,000 miles of publicly-accessible trail, as well as frozen lakes and ponds. These trail use public and private lands and are well-integrated into the state's communities, providing riders with the ability to refuel, eat and drink, and stay overnight during tours.

Key Takeaways

A 2012 study found that snowmobilers in New Hampshire were responsible for **\$203 million in activity-related spending per year.**

100 local volunteer snowmobile clubs steward the state's expansive snowmobile trail network, which is a huge undertaking.

Snowmobiling is **critical for hospitality businesses in the Great North Woods** region, which hosts the state's most popular snowmobiling destinations.

Approximately **80%** of snowmobile trails in New Hampshire are located on **private lands**.



New Hampshire's
Snowmobile Industry

B E A

New Hampshire
OUTDOOR RECREATION
INDUSTRY DEVELOPMENT

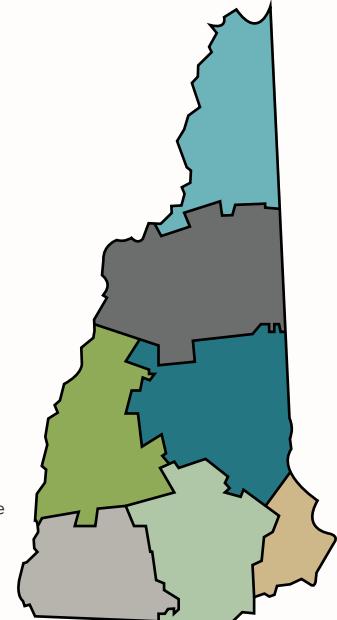
SNOWMOBILE OVERVIEW

Geographic Availability

A photograph showing two snowmobiles on a snowy trail. The snowmobile in the foreground is dark-colored with its headlights on, kicking up snow. Another snowmobile is visible further down the trail, also with its lights on. The background shows a forest of evergreen trees under a hazy sky.

As of June 2023, there are over 7,000 miles of publicly-accessible snowmobile trail in New Hampshire, according to the New Hampshire Snowmobile Association. Snowmobile trails can be found all over the state, but are most prevalent in the northern Merrimack Valley, the Lakes Region, the Dartmouth – Lake Sunapee region, the Monadnock region, and the Great North Woods. The vast majority (approximately 80%) of these trails are located on private property, with many landowners only granting public access in the winter season. Naturally, trails in the northern regions of the state tend to have longer and more consistent snowmobiling seasons due to the depth and persistence of the snowpack. One of the largest gaps in the statewide snowmobile network is in the White Mountain National Forest, as federal wilderness regulations do not permit motorized vehicle access.

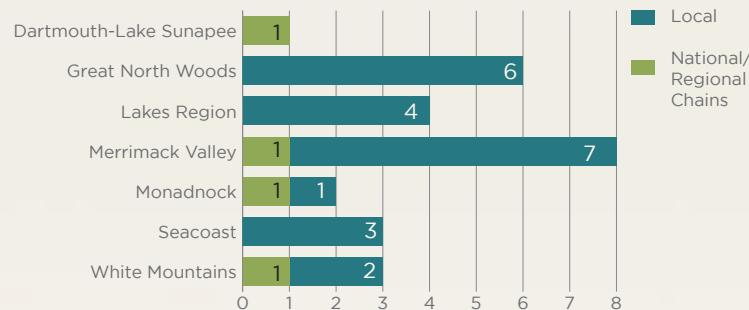
New Hampshire's snowmobile trail network consists of several trail classifications. Corridor trails provide continuous trail connections through and between different regions in the state, while Primary trails serve as the main connectors within different regions. Secondary trails round out the trail network by providing local loops and connections. New Hampshire's state-owned rail trails also provide key connections for snowmobiles. Snowmobiles are permitted on approximately 300 miles of state-owned rail trail. These trails also provide connections to trails in Vermont, Maine, Massachusetts, and Quebec, opening up additional opportunities for extended tours.

- 
- A map of New Hampshire divided into seven colored regions, each representing a different snowmobile trail area:
- Great North Woods (teal)
 - White Mountains (dark gray)
 - Dartmouth-Lake Sunapee (green)
 - Lakes Region (blue)
 - Monadnock (light gray)
 - Merrimack Valley (light green)
 - Seacoast (orange)

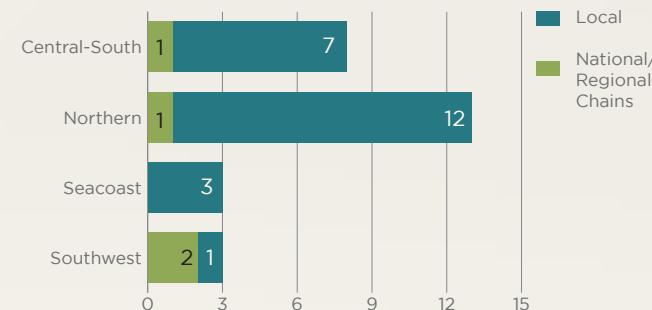
SNOWMOBILE BUSINESSES

Retail Stores

Snowmobile Retail Sale Businesses by Tourism Region

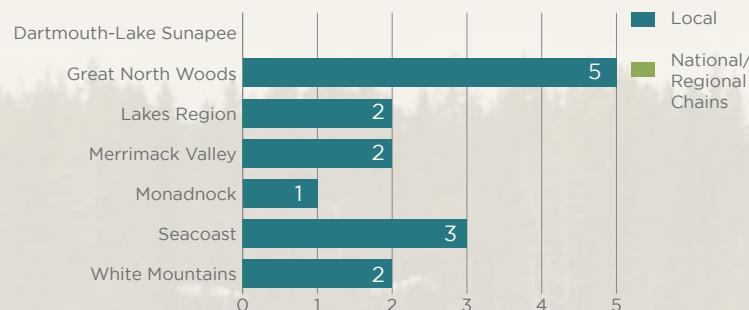


Snowmobile Retail Sale Businesses by CEDR Region

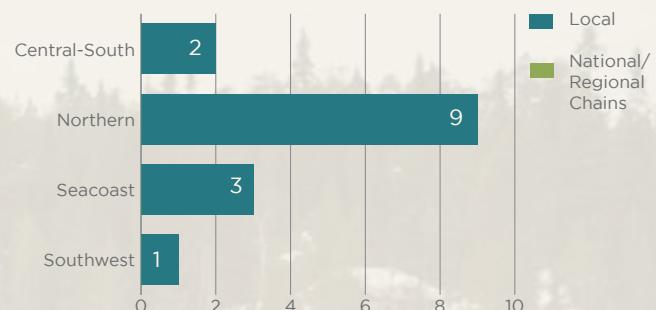


Servicing and Repair

Snowmobile Servicing/ Repair Businesses by Tourism Region

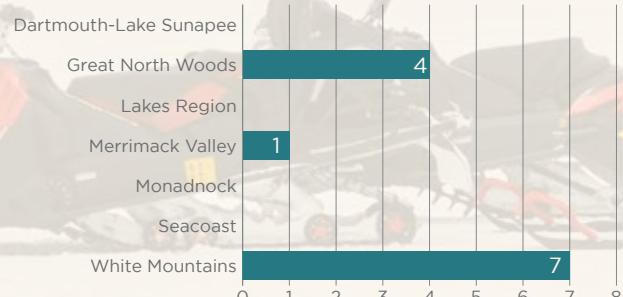


Snowmobile Servicing/ Repair Businesses by CEDR Region

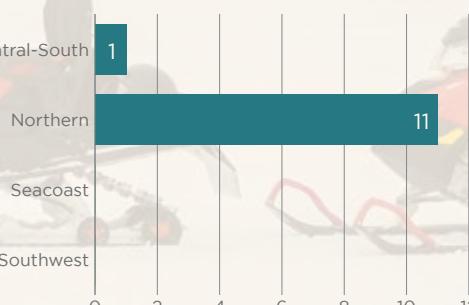


Rentals

Snowmobile Rental Services by Tourism Region



Snowmobile Rentals by CEDR Region



Snowmobile Organizations

There are a variety of public, private, and non-profit organizations that support snowmobiling in New Hampshire.

New Hampshire Fish & Game: NHFG processes snowmobile registrations, performs law enforcement duties for snowmobiling regulations, assists with search-and-rescue operations, and provide snowmobile education courses.

NH Trails Bureau: The NH Trails Bureau assists with maintenance of state-owned rail trails and is responsible for disbursing federal grant funds to local clubs.

New Hampshire Snowmobile Association: NHSA promotes coordination between snowmobile clubs and state agencies, maintains the statewide map of snowmobile trails, organizes races and snowmobile events.

Public Land Managers: snowmobiling is permitted in certain State Parks, select federal lands, and numerous town forests.

Local Clubs: there are 100 local snowmobile clubs in New Hampshire; these clubs are largely responsible for building and maintaining trails, as well as managing relations with private landowners who host sections of trail.



PARTICIPATION

Snowmobile registrations are helpful in tracking participation snowmobiling, but tend to vary year-to-year based on snow conditions. From 2017 to 2020, snowmobile registrations were between 42,000 and 48,000 per year in New Hampshire. However, in 2016, there were only 22,880 registrations, and in 2010 there were over 56,000 registrations.

While a useful data point, registrations do not indicate how frequently residents are participating in snowmobiling, and do not reflect participation by those who are renting equipment. A 2012 study found that out-of-state snowmobilers that were registered in New Hampshire took an average of 5.7 trips per year, with an average of 2.42 days per trip, while New Hampshire residents took 8 trips per year, with an average of 1.35 days per trip.



INDUSTRY PULSE

 Local snowmobile clubs provide critical trail maintenance and grooming services and are usually the point of contact for private landowners that host snowmobile trails. Regular trail grooming is necessary to keep trails rideable; high-use trails are typically groomed daily. Trail grooming is expensive – groomers cost hundreds of thousands of dollars, and there are additional costs for fuel, maintenance, and insurance. Most grooming is done by volunteers.

 The state's Grant-in-Aid Program recycles snowmobile registration fees back to clubs to support trail maintenance and club expenses. Registration fees are set via state legislation, which presents a challenge during periods of cost inflation.

 Snowmobiling is thought of as a lifeline for certain hospitality businesses in the winter, particularly fuel stations, restaurants, and lodging establishments north of the White Mountains that are not connected to the winter ski industry.

 Recent changes in technology have improved the snowmobiling experience, including enhanced suspension systems that allow riders to travel further with less fatigue and built-in navigation systems. At the same time, the price of new snowmobiles has climbed significantly, posing a potential barrier to entry to the sport for new riders.

 Land access is critical for the viability of snowmobile trail corridors. The sale of private property can result in the closure or reroute of trail. The state's current use program is a key tool for securing trail access on private lands.

ECONOMIC IMPACT STUDIES

A 2012 Plymouth State University study found that snowmobilers in New Hampshire were responsible for \$203 million in activity-related spending per year. Residents spent approximately \$79 per day on activity-related expenditures while snowmobiling, while out-of-state visitors spent \$114 per day.

Data Needs

- >> Updated data on participation, including frequency and demographic breakdowns
- >> Updated economic impact data



2023
NEW HAMPSHIRE OUTDOOR
INDUSTRY INVENTORY
SURFING

EXECUTIVE SUMMARY

New Hampshire's Seacoast region provides opportunities for ocean surfing at various breaks along the state's 18 miles of coastline. Surfing occurs year-round in New Hampshire, including in the winter months when larger swells are often present.

Key Takeaways

While New Hampshire's coastline is small, it supports a **high concentration of quality surfing opportunities** and is therefore a regional destination for surfing. Some of the best surfing conditions are found during the winter season, which requires additional gear and preparation.

There is not currently data on the level of participation or economic impact of ocean surfing in New Hampshire; however, there are a variety of businesses in the Seacoast region that cater to surfers.

Most public access to surfing in New Hampshire is via ocean beaches managed by **New Hampshire State Parks**.





SURFING OVERVIEW

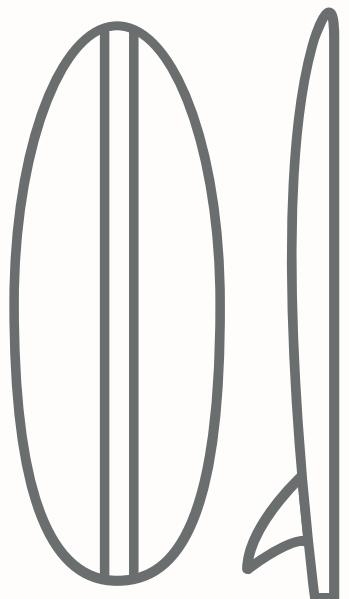
Geographic Availability

Surfing is confined to New Hampshire's 18-mile long ocean coast but is quite accessible to the public within this region. There are 13 public ocean beaches, managed by New Hampshire State Parks and local governments, which vary in terms of surf quality. There are also other informal access points where surfers may go to access different breaks and swells. Among the most well-known locations for surfing along New Hampshire's coast are Jenness Beach, North Beach, and Seabrook Beach. Some State Park beaches have designated surfing areas to reduce potential conflict with other activities.

The concentration of surfing opportunities along New Hampshire's coastline has helped turn it into a regional destination for surfing. Surfing opportunities are present in Maine and Massachusetts, but are more spread out. The increased presence of Great White sharks off the coast of Cape Cod has also encouraged more surfing along New Hampshire's Seacoast.

Participation

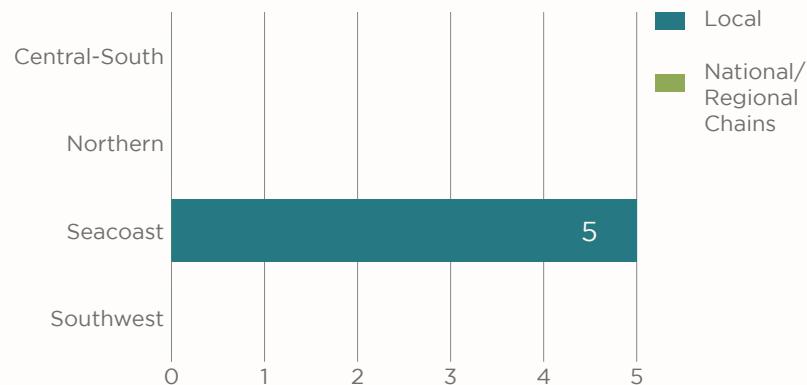
Currently, there is not data on the number of participants in surfing in New Hampshire. Since surfing is not a fee-based activity and occurs over a dispersed area, tracking participation is difficult. Reports indicate that surfing is popular on days with quality surf conditions; it is not uncommon to see many dozens of surfers on the water on peak summer days. Additionally, improvements in technology have increased the accessibility of surfing - soft -top surfboards provide a beginner-friendly equipment option, and improvements in surf forecasting allow participants to understand when quality surf conditions will be present at different swells.



SURFING BUSINESSES

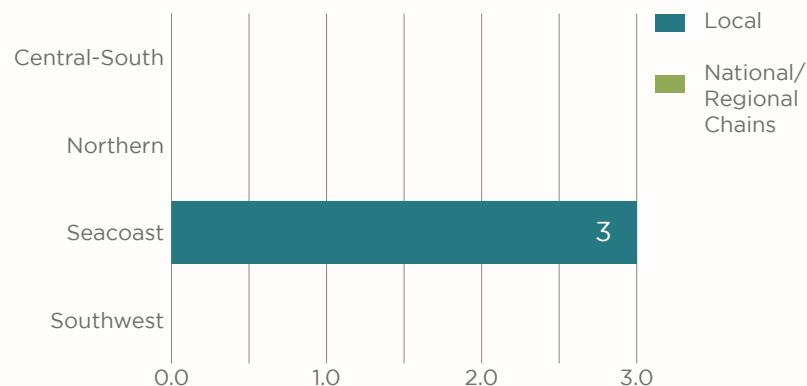
Retail Stores

Surfing Retail Sale Businesses by CEDR Region



Rentals

Surfing Rentals by CEDR Region



Surfing Organizations

There are a variety of public, private, and non-profit organizations that support surfing in New Hampshire.

New Hampshire State Parks: Most surfing access in New Hampshire is through ocean beaches managed by New Hampshire State Parks. Jenness Beach State Park and North Beach State Park are two of the premier surf destinations in the region

Municipal Governments: Local governments also manage ocean beaches along the Seacoast. Seabrook Beach is one example of a municipal beach that is well-known for surfing.

Surf Rider Foundation (NH Chapter): the Surf Rider Foundation organizes beach cleanups, supports surfer education, and puts on events to build the surfing community in New Hampshire.

Eastern Surfing Association: the Northern New England Chapter of ESA supports surfing competitions along the Atlantic seaboard, including several in New Hampshire.



INDUSTRY PULSE

 New Hampshire has become a regional destination for surfing owing to the concentration of quality surfing opportunities within a small area and ease of access to ocean beaches and swells.

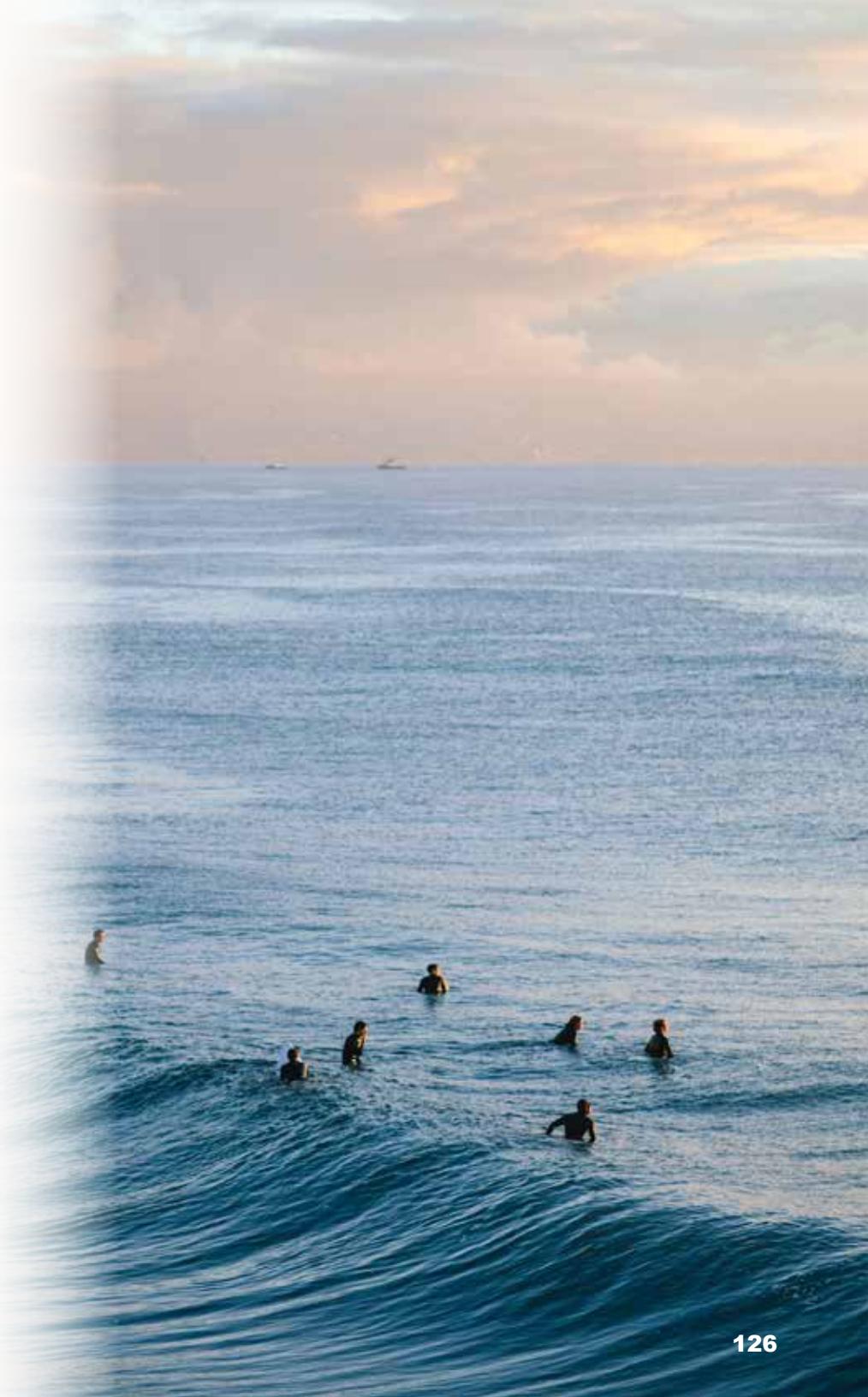
 Surfing in New Hampshire is a year-round business. Summer is popular with surfers of all abilities, while winter brings larger swells that are sought after by more experienced surfers. Fall weather patterns can also produce large swells suitable for experienced surfers.

 Jenness Beach and North Beach are particularly popular when there is quality surfing conditions; nearby restaurants and bars know to expect more business when there is a good surf.

 Retail surfing stores are a year-round business for many in the Seacoast region. Surfing equipment and gear is not as conducive to online sales as other sports; customers often prefer to try on wetsuits and other pieces of gear in-person to ensure proper fit and function.

 There is close coordination between surfing business and New Hampshire State Parks. This includes establishing designated surfing areas at State Park beaches and organizing Water Safety Day and other educational efforts.

 Increasing sea levels are a potential threat to the viability of surfing in New Hampshire. Over the last decade, it has become increasingly difficult to surf during high tide due to beaches being entirely submerged.



Economic Impact Studies

To-date, no studies have been completed to understand the economic impact of surfing in New Hampshire.

Data Needs

- >> Participation in surfing
- >> Economic of surfing

