



NEW HAMPSHIRE: OUTDOOR ECONOMY SUMMARY

COMPETITIVE ADVANTAGE. New Hampshire has long *used* the great outdoors for tourism and business development purposes however it has never *leveraged* these natural assets to attract, stimulate, and improve the economy. Economic activity around outdoor pursuits is the basis for the emerging outdoor economy, which caters to an outdoor-based lifestyle which is one of the primary reasons many live in New Hampshire. This universality is part of what makes the industry so powerful, as an economic engine and an agent of positive change. It crosses every demographic line: age, income, gender, race, political, orientation and culture. Simply put, outdoor recreation is a major economic driver and is the State's competitive advantage.

EMERGING ECONOMIC SECTOR. The emerging outdoor recreation economic sector represents \$2.8 billion in consumer spending (3.2% of the State's economy), supporting 37,051 jobs (4.1% of total NH jobs and 8th in nation for employment growth), \$1.3 billion in wages (2.7% of total compensation and 4th in nation in compensation growth), and \$528 million in state/local taxes. Many types of industries depend on the outdoor economy, including companies that make recreation gear, local shops that serve tourists, and even non-recreation businesses to provide a competitive advantage for hiring and retaining workers through trail amenities and access to the outdoors. Those industries include arts, hospitality, technology, health care, manufacturing, retail, food, and entertainment, among others. The compelling nature of the outdoor economy is that it is cross-sector, meaning it is an eco-system, an interconnection of various industries that work together in regional or local communities.

GRANITE OUTDOOR ALLIANCE (Granite Outdoor) is a statewide membership-based 501(c)(3) non-profit organization formed in 2020 to support the NH outdoor industry including businesses, non-profits, associations, and individuals/families using a collaborative network impact model. The mission of the organization is to advance the outdoor industry forward toward a sustainable and responsible future by focusing on (i) economic development + infrastructure; (ii) conservation + stewardship; (iii) **workforce + education**; and (iv) health + wellness.

WORKFORCE INVESTMENT. To improve the outdoor economy workforce, (i) industry workforce skillsets must be improved through professional and career and technical education programs in collaboration with aligned industries to promote existing job pipelines *and* to create jobs currently not-existing, which likely will deliver workforce growth and increase sector productivity; (ii) entrepreneurial business programs (i.e. accelerator) would initiate additional in-migration of professional workers in knowledge capital industries; (iii) collaborative community platform to support online outdoor hub marketplace for outdoor industry would provide increased access to opportunities (jobs, housing, workforce forums, industry information) and attract younger workers, businesses, and host outdoor experiences/trails across the state; and (iv) infrastructure investment would attract and recruit younger workers who seek to take advantage of outdoor opportunities, all of which is required to offset New Hampshire's severe aging problem.

PROPOSED INVESTMENT. Granite Outdoor recommends an initial investment of One Hundred Ten Thousand Dollars (\$110,000) to boost operations, programs, and marketing efforts to improve the outdoor economy's enormous potential and implement workforce initiatives stated above. These workforce investments will tackle head-on longstanding issues plaguing the industry such as seasonality, transiency, and low wages (that have resulted from past investments in tourism and service businesses) and support cultivating the outdoor industry as a leading sustainable economic sector in New Hampshire.