



# **Resident Sentiment Study**

**December 2024**

**SMARInsights**

# Background

- The travel and tourism industry has long focused on generating additional visitation and spending to destinations. However, this singular focus has been criticized as failing to recognize residents of the destination as the real “customer” of the industry. The reason to generate travel to an area is partly to help the region economically, but more broadly to promote the overall health and appeal of the area.
- Tourism helps the economy by bringing in visitors and spending, which can also help developments in infrastructure, culture and amenities. More visitors mean more restaurants and attractions, not just spending. It is also important to remember that nearly all residents new to an area start as visitors.
- Visitation also has downsides – traffic, inconvenience, and higher costs of living are typical negative consequences. Overtourism and crowding happens in the worst case.
- Given these contextual considerations and recognition that residents are customers, it is imperative to consider the “value of tourism” through the eyes of the state’s residents. In their minds, what are the strengths, weaknesses and appeal of building visitation, and to what extent should promotional efforts be pursued to increase more travel to an area?
- This research is designed to address resident attitudes toward tourism in the state of New Hampshire.

# Methodology

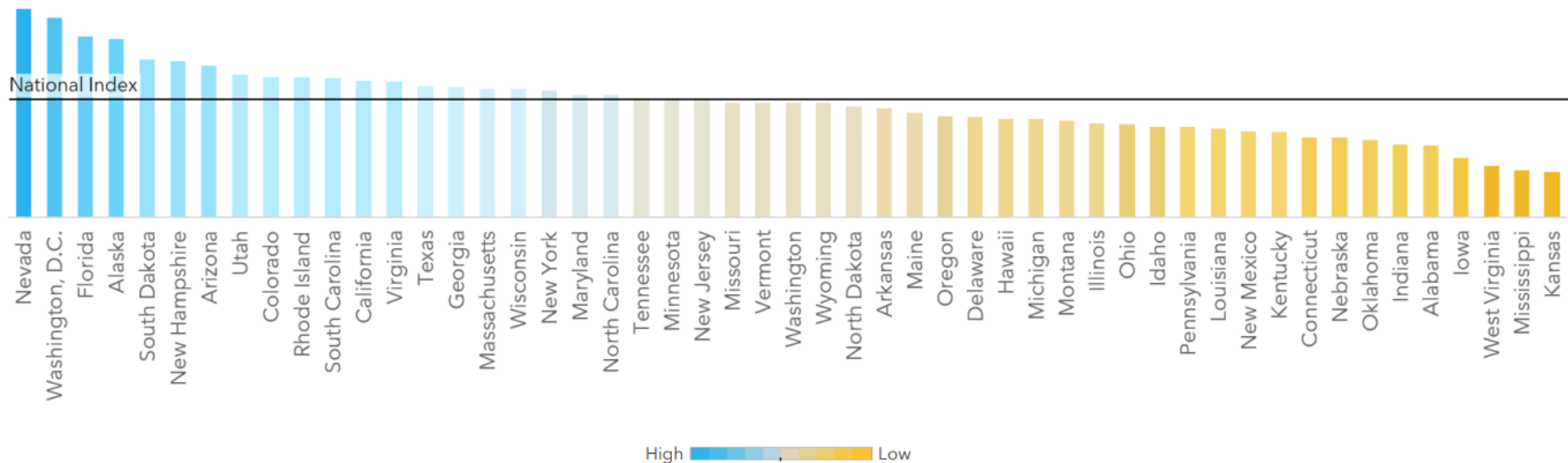
- A multi-tiered research effort was developed to explore New Hampshire resident attitudes towards tourism.
- First, a nationally syndicated study by Omnitrax was acquired to provide a comparative context of how the state's residents feel about tourism compared to the rest of the U.S.
- Second, a total of 1,260 surveys were conducted with residents utilizing purchased representative sample from demographically balanced sample providers. This was augmented by outreach efforts of the Division of Travel and Tourism Development and other members of the industry throughout the state to help provide a sufficiently large sample to review perceptions within the state's tourism regions. These efforts generated an additional 542 interviews.
- These data were balanced and weighted by age, region population, and level of involvement in the tourism industry to eliminate any response skews.
- The survey instrument was designed by SMARInsights in cooperation with state and local representatives. A copy of the questionnaire can be found in the Appendix.

	Paid Online sample	Outreach Sample
Seacoast	231	132
Merrimack Valley	575	97
Monadnock	124	8
Lakes	148	49
Dartmouth Lake Sunapee	85	37
White Mountains	72	196
Great Woods North	25	23
TOTAL	1260	542

## Comparative Findings

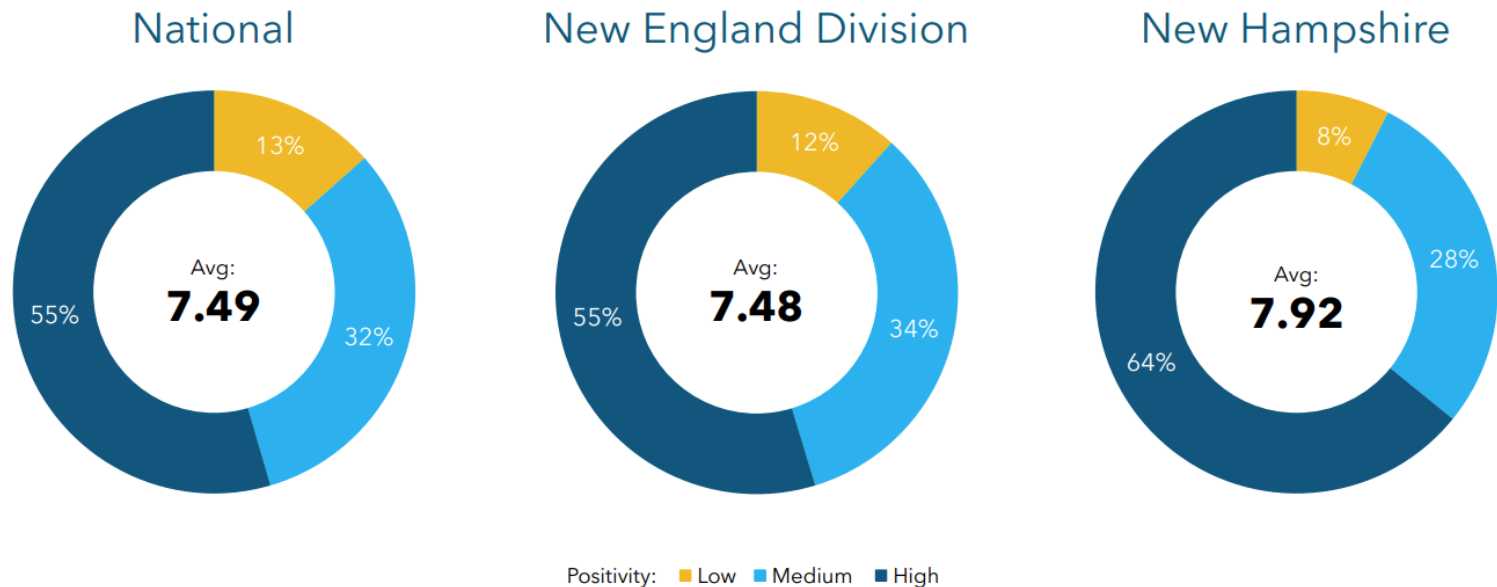
# Overview of Resident Sentiment Towards Travel & Tourism in the U.S.

- The nationally syndicated study of 144,000 U.S. households and 798 New Hampshire residents revealed that the state has the sixth most positive perception towards tourism (illustrated below). The top three destinations have strong tourism economies. Those more poorly ranked have decidedly weaker tourism economies. This comparative context provides an initial glimpse of New Hampshire residents' positivity towards the industry.



# Overall Perception of Travel and Tourism in the State

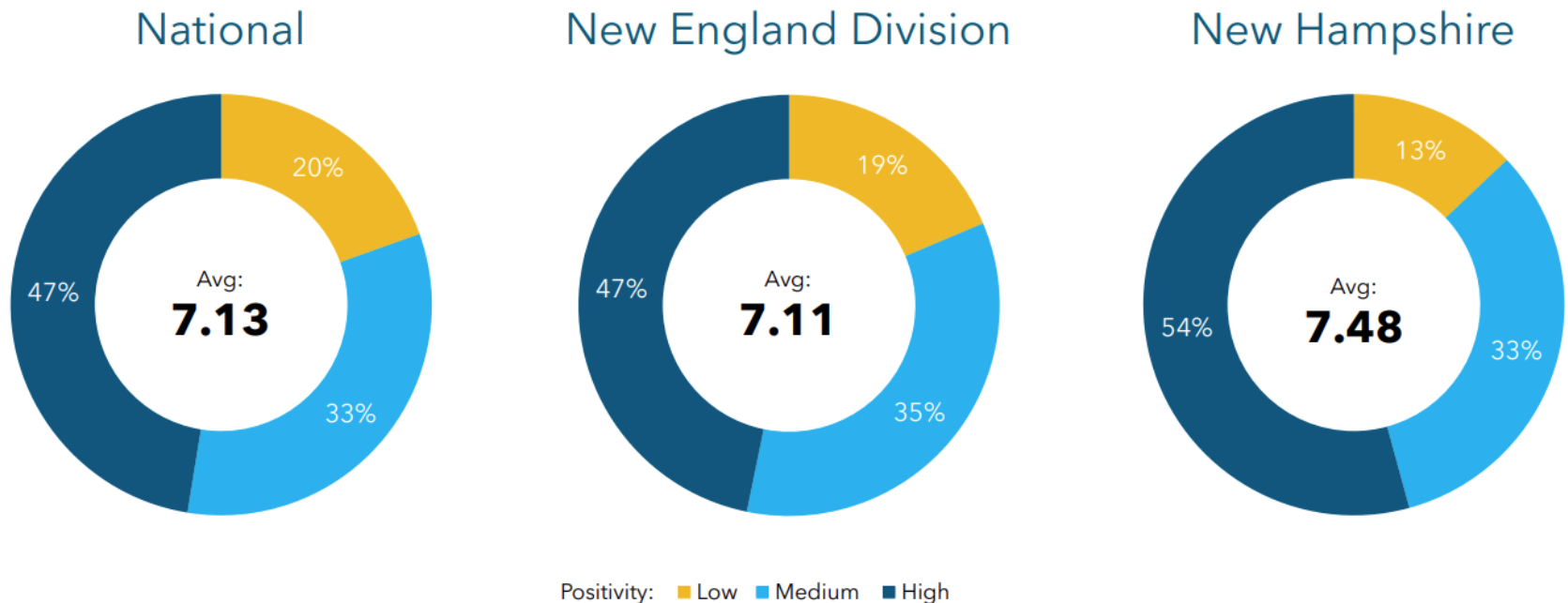
- Perception of the travel and tourism industry among New Hampshire residents is significantly higher than the national average and neighboring New England states. Ratings were on a 10-point scale, with residents communicating nearly 10% more High Positivity towards the industry than national or regional respondents.



Note: the New England Division (i.e., Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, and Vermont) is one of the nine census divisions defined by the U.S. Census Bureau.

# Overall Perception of Travel and Tourism in the Local Area

- Interestingly, perceptions of tourism at the local level are consistently lower than statewide perceptions. This may simply reflect the fact that tourism appeals are not evenly distributed across a region or state. In this regard, New Hampshire residents continue to be significantly more positive than those regionally or nationally.



# Overview versus Understanding

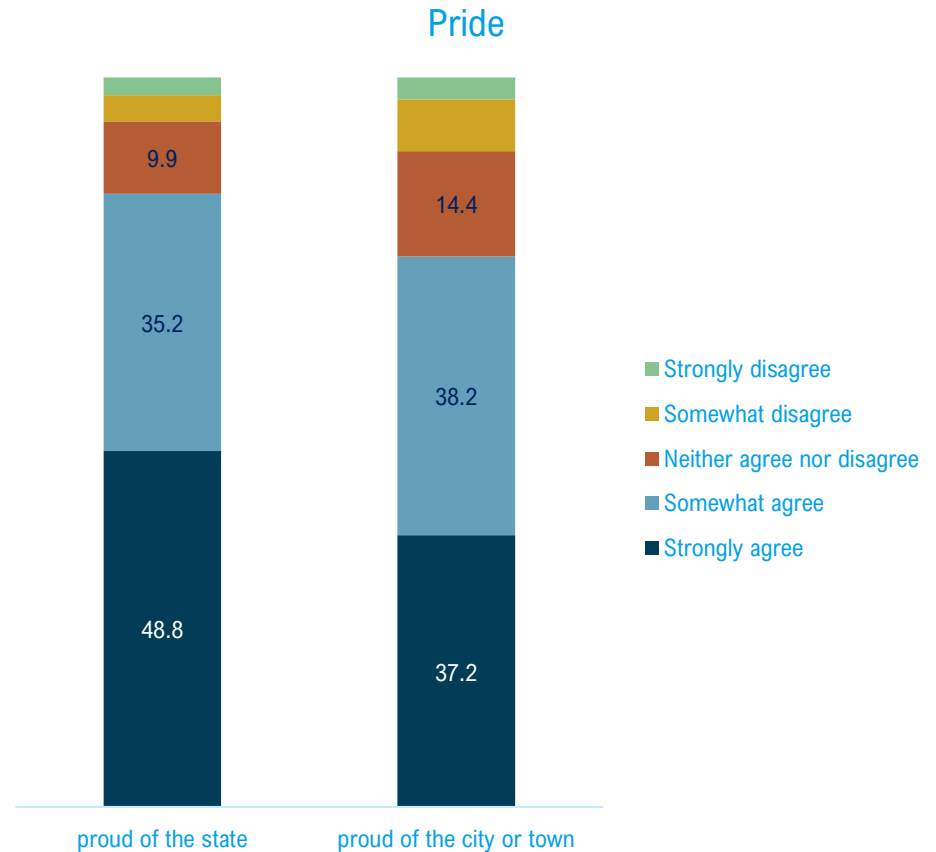
- The national comparative findings are dramatically positive with an excellent comparative result. However, beyond being a scorecard, there is little that can be done with this finding.
- The critical issue is not simply how the residents of the state compare on a national basis, but why they feel the way they do. What drives the positivism and how can that be improved? What are the negatives and how can they be addressed?
- If we view residents as the customers, this represents a type of customer satisfaction study that investigates what is done well, what is done poorly, and what can be improved.
- These considerations represent subjects like quality of life and perceptions of pride in where one lives. They further signify what drives positive resident attitudes and where there are areas of concern.
- Additionally, matters surrounding the positives and negatives of tourism in their destination – and the important role of promoting additional visitation – need to be explored in detail to understand this specific customer perspective.



## Evaluation of Place

# Community Pride

- While this research will ultimately focus upon attitudes towards the travel and tourism industry, it is instructive to begin more broadly with attitudes about the place in which residents live, such as their pride in the location. Interestingly, as was seen in terms of overall tourism attitudes, feelings are generally more positive towards the state than the local city or town.



# Type of Place

## Top Two Box Statement Agreement



- The strength of positivism about the state is better understood with other specific descriptors beyond measures of pride.
- The strongest of these are *A good place to visit for a weekend getaway or vacation*, *A good place to live*, and *A good place to raise a family*.
- Interestingly, image perceptions are decidedly less positive from the career perspective. The state rated much less desirable as a place to start a career or business or do meetings and conventions.
- This suggests that the state's appeal is less about economic considerations and more about cultural / lifestyle ones.
- Notably, being a good place to live and raise a family strongly correlates with pride.

# Descriptors of the State - Outdoor

- To better understand the residents' perceptions, they were asked to rate the state **as a place to live** on a list of attributes often used when assessing travelers' perceptions.
- Amongst travelers, the strongest perception of the state is of the outdoor product. A similar result is found with residents.
- A total of 32 statements were rated, with a factor analysis performed to see which ones moved together. Overall, the strongest ratings were with the outdoor related considerations.

Natural beauty and scenic landscapes	4.69
Beautiful	4.63
A great place for winter sports such as skiing and snowmobiling	4.58
Offers lots of outdoor recreation	4.56
Has a variety of landscapes	4.47
A good place for a road trip	4.44
Has great state parks	4.37
A good place to vacation when traveling without children	4.32
Offers a clean and healthy environment	4.32
A good place for me to stroll around	4.28
A good place for fairs and festivals	4.28
Is a kid-friendly vacation destination	4.27
Charming	4.27
A good place for water activities	4.18
A good place for agritourism such as U-pick farms, farm tours	4.14

# Descriptors of the State - Culture

- The next strongest characteristics associated with the state as a place to live were focused on the state's cultural and developed amenities.
- The *glue* here is cultural considerations, but measures include fun, romantic, and exciting experiences.
- The strongest rating is understandably *Easy to get to*, followed by a variety of activities.

Is easy to get to	4.22
Is unique because of the variety of destinations and activities it offers	4.15
Has interesting historical sites and museums	4.12
Fun	4.09
Always has something new to discover	4.00
A good place for shopping	3.95
Excellent restaurants	3.90
A good place to go to the beach	3.90
Romantic	3.84
Exciting	3.70
A good place for culinary activities	3.62
Rich in culture and the arts	3.62

# Descriptors of the State - Comfort

- The last group of descriptors are about comfort. This includes measures of affordability and value, but also extends to being friendly, welcoming, and safe.
- The net result is the place feels relaxing.

Relaxing	4.34
Safe	4.25
Friendly people and welcoming atmosphere	3.99
A good value for my money	3.76
Affordable	3.38

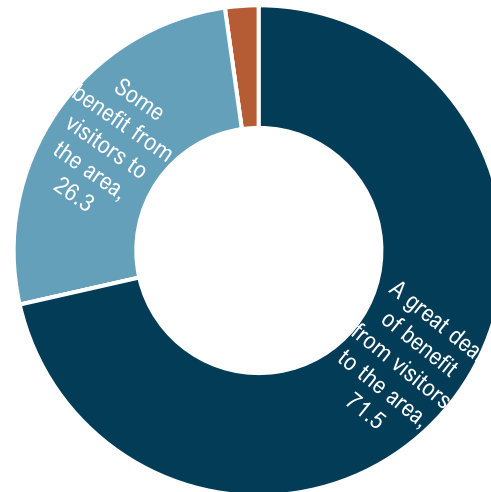


## Sentiment Towards Tourism

# Overall Perceptions

- It has already been seen that residents generally feel quite positive about tourism. In fact, nearly two-thirds of those interviewed (63%) rated their perception of the industry an 8, 9 or 10 on a ten-point scale, which is nearly 10% more than the national and regional average.
- Additionally, residents were asked about how much benefit the state receives from tourism – with those results being even stronger.
- Clearly there is a recognition that tourism brings value to the area. While this is positive, it is important to get underneath overall perception and understand the underlying dimensions that determine value, benefits, and perceived downsides of tourism.

How much does the State Benefit from Tourism



# Tourism Impacts

- Residents were asked to rate their level of agreement with statements describing the impacts of tourism – both positive and negative. Economic benefits include money, jobs, community impact, and image. Overall, the positives outweigh the negatives.
- The top negative is too much traffic. About a quarter of those surveyed report seeing too many tourists / too much tourism.

The money visitors spend in my community is important to the economy	75%
Tourism helps the local businesses in my community	75%
Tourism enhances New Hampshire's identity	72%
More tourism is generally a good thing	62%
Tourism shows people that my community is a good place to relocate	62%
Tourism provides jobs in my community	61%
I enjoy the attractions and businesses that are here because of tourism	53%
Tourism is creating too much traffic	51%
The tax revenue generated by tourism helps pay for services my community needs	50%
Tourism places strain on local services/amenities such as roadways and emergency services	41%
Tax revenue from tourism helps to offset local property taxes	37%
Tourism is causing too many people to move here	35%
There are too many tourists coming to my area	27%
Tourism only helps the large businesses in my community	25%
There is too much tourism in my community	19%
I/my family benefit personally from tourism spending	19%

# Correlation with Overall

Tourism enhances New Hampshire's identity	56%
More tourism is generally a good thing	48%
I enjoy the attractions and businesses that are here because of tourism	46%
Tourism helps the local businesses in my community	43%
Tourism shows people that my community is a good place to relocate	43%
The tax revenue generated by tourism helps pay for services my community needs	41%
Tourism provides jobs in my community	37%
The money visitors spend in my community is important to the economy	37%
Tax revenue from tourism helps to offset local property taxes	33%
I/my family benefit personally from tourism spending	29%
Tourism only helps the large businesses in my community	-16%
Tourism is creating too much traffic	-21%
Tourism is causing too many people to move here	-21%
Tourism places strain on local services/amenities such as roadways and emergency services	-25%
There are too many tourists coming to my area	-30%
There is too much tourism in my community	-31%

- One way to understand what drives overall attitudes is to consider the relationship between overall ratings and individual considerations. A correlation analysis shows the strength of these relationships and clearly illustrates that overall generalized benefits drive positive feelings about the industry. Conversely, generalized negatives – e.g., “too many tourists” – drive negative attitudes.

# Tourism Promotion

- Likewise, residents' attitudes towards tourism promotion were explored and yielded similar results. Advertising is ultimately seen as building awareness, attracting visitors, and as being a good return on investment.
- Again, around a quarter of those interviewed see tourism as a waste of money and something that shouldn't be done.

Promoting New Hampshire as a place to visit makes people more aware of all that New Hampshire has to offer	83%
Promoting my community as a place to visit attracts customers for local businesses	71%
Tourists will continue to come to my community even if we stopped all tourism advertising	63%
Advertising to attract visitors generates a good return on investment	60%
Tourism promotion has increased my pride in New Hampshire as a destination	42%
The taxes generated when visitors spend money should be partially reinvested to pay for marketing the area for tourism	41%
Tourism promotion has limited my access to certain amenities such as parks, public spaces, and recreation areas	33%
We shouldn't be trying to attract additional tourists to the community	23%
Advertising to bring visitors to my community is a waste of money	22%

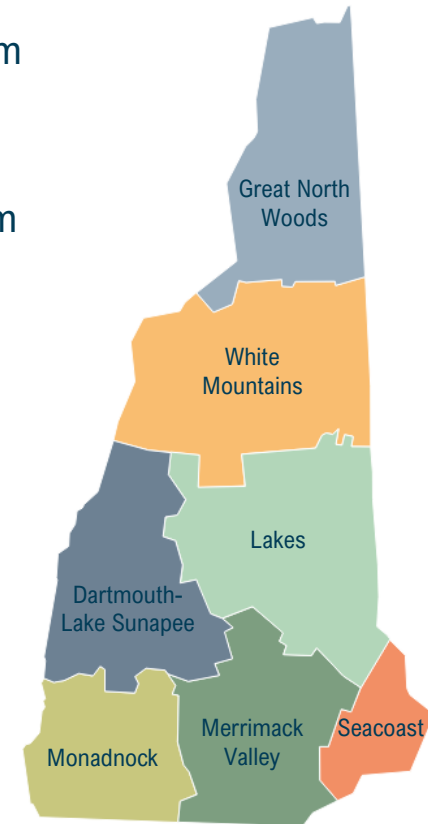


## Tourism Regions

# Region Review

- The scope of this residential research effort was expanded in terms of sample size considerations to allow for the review of these findings by the seven tourism regions in the state. These regions each have a different character of product and appeal and are dramatically different in terms of size and level of tourism.
- To provide context for this review, it is interesting to note population and tourism statistics. Clearly the White Mountains have significantly more tourism activity than other regions.

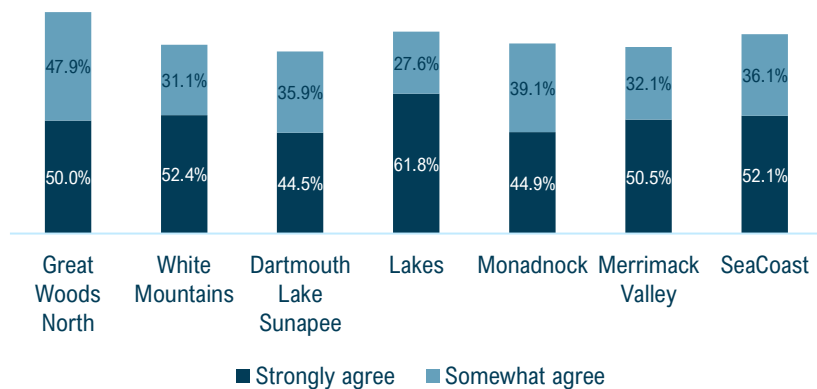
	Visitor spending	Visitors	Population	Spending per resident	Visitors per resident
Great North Woods	\$109,500,000	510,800	25,480	\$4,297	20
White Mountains	\$1,200,000,000	3,500,000	55,624	\$21,573	63
Dartmouth Lake Sunapee	\$416,500,000	1,400,000	97,099	\$4,289	14
Lakes	\$767,700,000	3,100,000	168,263	\$4,563	18
Monadnock	\$385,900,000	1,800,000	133,287	\$2,895	14
Merrimack Valley	\$2,200,000,000	3,800,000	640,833	\$3,433	6
Seacoast	\$1,800,000,000	2,700,000	264,758	\$6,799	10



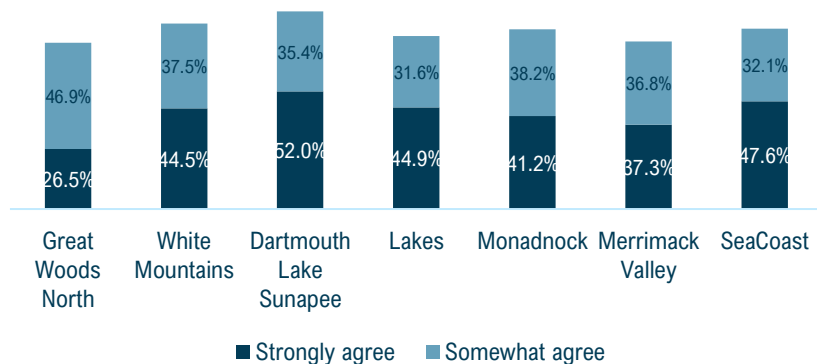
# Community Pride

- The level of pride with the state and local community somewhat differs across tourism regions.
- Interestingly, the Great North Woods has the most pride in the state and the least in the local community. The reverse is true for the Dartmouth Lake Sunapee region.

## State Pride



## Local Pride



# Type of Place by Region

- When we consider residents' views of their state by their tourism region, there are generally few differences between them with clear strengths and weaknesses. Overall, the Seacoast and the Lakes regions have the strongest perceptions and Monadnock the worst. The Great Woods North views the state most positively as a place to live and work. Dartmouth-Lake Sunapee excels as a place to start a career.

	Great North Woods	White Mountains	Dartmouth Lake Sunapee	Lakes	Monadnock	Merrimack Valley	Seacoast
A good place to live and work remotely	90%	90%	91%	91%	85%	88%	91%
A good place to start a business	92%	86%	86%	88%	85%	85%	92%
A good place to live	98%	84%	80%	89%	84%	83%	88%
A good place to expand a business	96%	83%	79%	88%	81%	84%	89%
A good place to start a career	73%	82%	87%	76%	79%	74%	80%
A good place to have a wedding	71%	68%	75%	78%	74%	77%	84%
A good place to attend college	73%	76%	71%	71%	65%	68%	76%
A good place to work	69%	60%	56%	67%	67%	68%	64%
A good place to visit for a weekend getaway or vacation	51%	57%	55%	72%	65%	69%	71%
A good place to raise a family	50%	46%	35%	62%	54%	58%	57%
A good place to hold a meeting or convention	49%	42%	43%	59%	45%	58%	57%
A good place to retire	42%	35%	45%	52%	50%	58%	57%

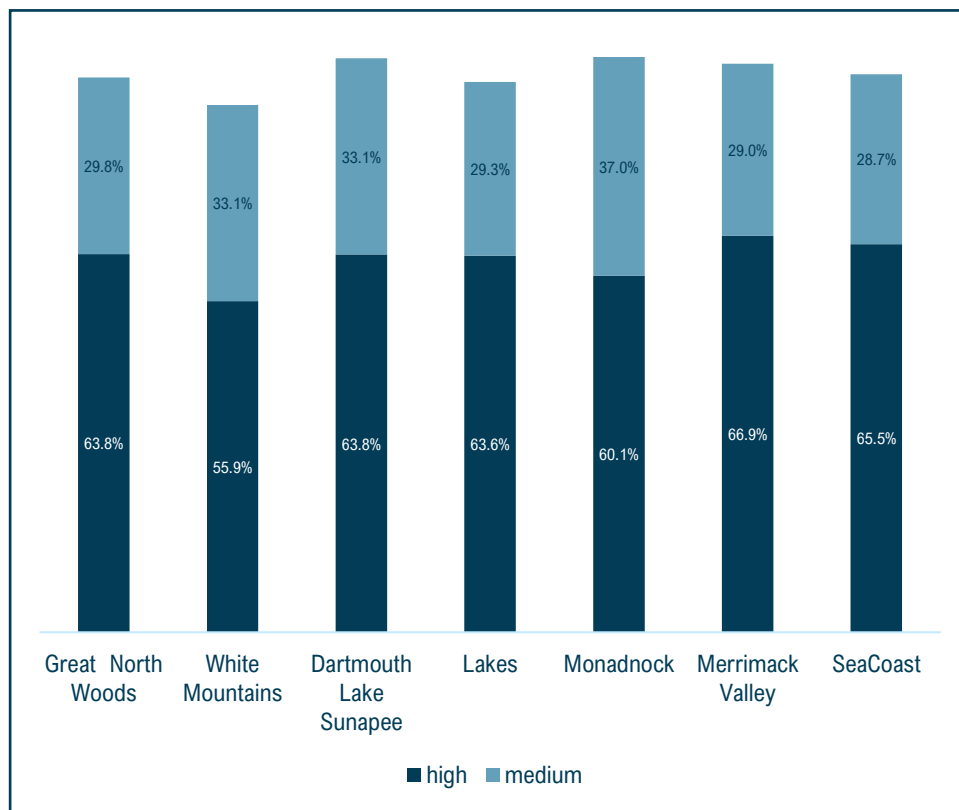
# Descriptors of the State by Region

- When it comes to residents' perceptions of the state as a place to live, there are no particularly significant differences based upon the region in which they live.
- It is important to note they are rating the state and not their region. As a result, greater differences are expected when we consider the perceptions of tourism and tourism promotion.

Region	Great North Woods	White Mountains	Dartmouth Lake Sunapee	Lakes	Monadnock	Merrimack Valley	Seacoast
Natural beauty and scenic landscapes	4.83	4.78	4.69	4.76	4.74	4.69	4.74
Beautiful	4.79	4.77	4.61	4.70	4.62	4.63	4.71
Offers lots of outdoor recreation	4.67	4.76	4.52	4.65	4.52	4.58	4.66
A great place for winter sports such as skiing and snowmobiling	4.67	4.62	4.55	4.58	4.54	4.59	4.55
Has a variety of landscapes	4.40	4.44	4.38	4.48	4.40	4.52	4.63
A good place for a road trip	4.48	4.44	4.30	4.46	4.39	4.49	4.53
Has great state parks	4.40	4.49	4.28	4.38	4.33	4.42	4.48
Relaxing	4.35	4.35	4.30	4.36	4.41	4.35	4.45
Offers a clean and healthy environment	4.38	4.46	4.35	4.38	4.33	4.30	4.43
A good place to vacation when traveling without children	4.29	4.40	4.19	4.44	4.27	4.32	4.45
A good place for me to stroll around	4.35	4.32	4.25	4.23	4.34	4.27	4.43
Safe	4.31	4.30	4.26	4.27	4.24	4.27	4.46
Charming	4.27	4.26	4.22	4.29	4.33	4.27	4.42
Is a kid-friendly vacation destination	4.27	4.29	4.24	4.39	4.16	4.28	4.34
A good place for fairs and festivals	4.31	4.15	4.10	4.30	4.23	4.31	4.32
Is easy to get to	3.96	3.99	3.89	4.18	4.19	4.29	4.29
A good place for water activities	4.23	3.96	3.81	4.41	4.05	4.22	4.33
Is unique because of the variety of destinations and activities it offers	4.06	4.15	3.98	4.20	4.11	4.18	4.29
Fun	4.19	4.21	3.97	4.18	3.98	4.14	4.26
Has interesting historical sites and museums	3.83	3.94	3.89	4.11	4.16	4.17	4.30
A good place for agritourism such as U-pick farms, farm tours	3.73	3.90	3.98	4.09	4.17	4.22	4.18
Always has something new to discover	4.00	3.99	3.84	4.02	4.02	4.05	4.12
Friendly people and welcoming atmosphere	4.23	3.97	3.98	3.98	3.88	4.04	4.07
Excellent restaurants	3.73	3.68	3.65	3.79	3.93	3.94	4.20
A good place for shopping	3.73	3.66	3.51	3.98	3.87	4.04	3.94
Romantic	3.92	3.89	3.70	3.88	3.86	3.88	3.98
A good place to go to the beach	3.58	3.29	3.26	3.88	3.64	3.97	4.25
A good value for my money	3.88	3.62	3.69	3.74	3.69	3.78	3.84
Exciting	3.73	3.66	3.51	3.75	3.65	3.75	3.74
Rich in culture and the arts	3.60	3.35	3.51	3.44	3.68	3.72	3.84
A good place for culinary activities	3.48	3.33	3.32	3.55	3.68	3.68	3.92
Affordable	3.63	3.11	3.29	3.23	3.41	3.42	3.24

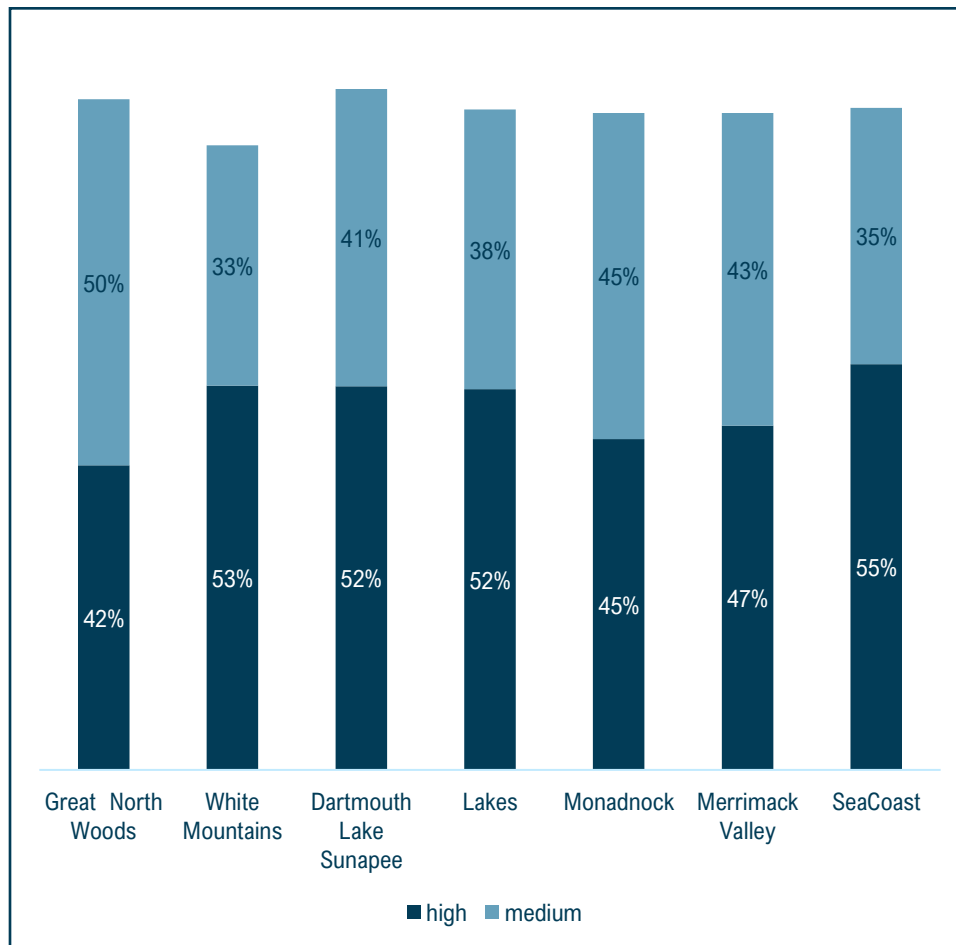
# State Tourism Perception by Region

- Interestingly, while the White Mountains have high tourism-related visitation and spending, residents of that region are the least positive about tourism in the state.
- Conversely, Monadnock, Dartmouth and Great North Woods – which have lower levels of tourism – seem more positive.
- Importantly, even among the areas which have more tourism activity, there is high favorability. However, there could be a tipping point where the negatives of visitation start to impact overall attitudes.

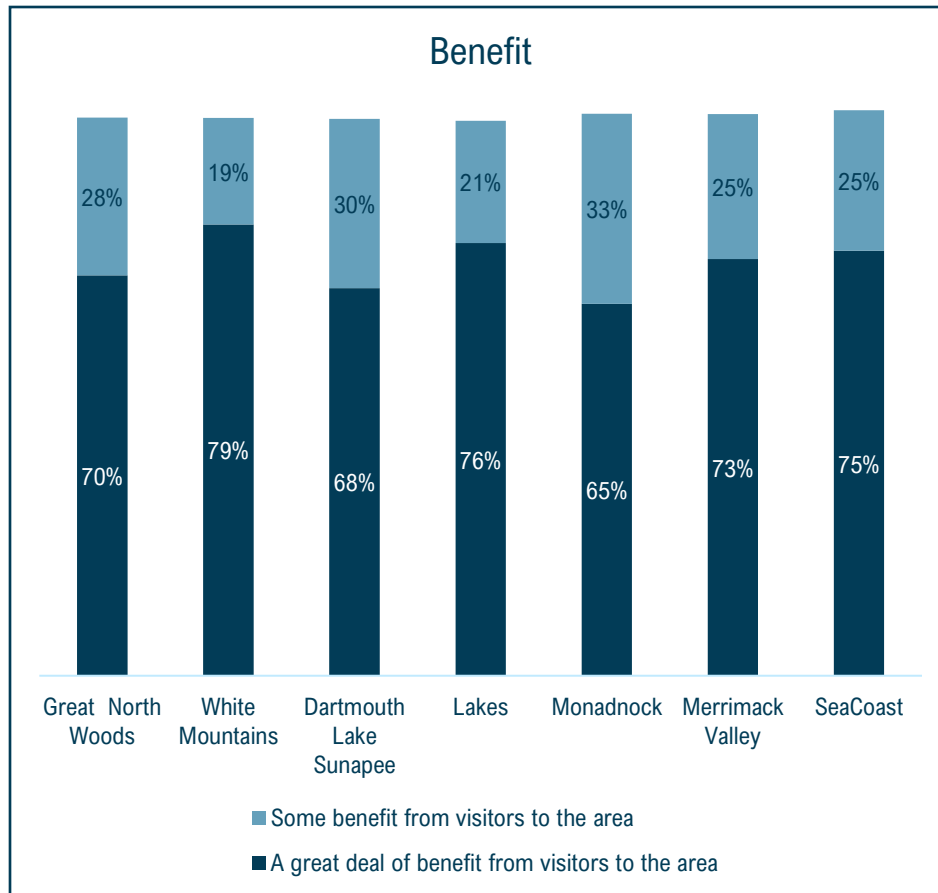


# Local Tourism Perception by Region

- At a local level, perceptions are again less positive than statewide. This is no doubt a function of local efforts and impacts, e.g., an “It can be good for others but not for me” attitude. Here, some of the least positive experience less visitation.
- Obviously, it is important to understand the differences in terms of specific experiences and benefits to analyze the drivers of these perceptions.



# Overall Benefit



- When we look to the perceived benefit that tourism provides, the data aligns well with the level of tourism in the regions and with those who experience it more seeing more benefit.
- It would seem that residents understand the importance of the tourism industry but also feel that with visitors come both positives and negatives.
- The detailed impact ratings make these differences clearer.

# Detailed attitudes by Region

Here, scores are indexed against the regional average on each attribute to illustrate specifically where agreement is higher and lower.

The White Mountains see the most economic and business benefit as well as too much traffic, infrastructure stress and too much tourism.

Similarly, the Lakes region exhibits similar if weaker skews. While this region has far less tourism, it has a high level of visitor per resident.

The fewest negatives are seen in the Monadnock and Merrimack Valley as well as the fewest positives.

	Great Woods North	White Mountains	Dartmouth Lake Sunapee	Lakes	Monadnock	Merrimack Valley	Seacoast
Region							
The money visitors spend in my community is important to the economy	100	106	99	103	92	98	101
Tourism helps the local businesses in my community	93	107	102	107	95	94	102
Tourism enhances New Hampshire's identity	97	98	101	101	99	103	102
Tourism provides jobs in my community	100	110	102	107	85	94	102
Tourism shows people that my community is a good place to relocate	96	99	103	103	97	98	105
I enjoy the attractions and businesses that are here because of tourism	98	101	99	101	95	100	105
More tourism is generally a good thing	98	94	102	98	100	106	102
Tourism is creating too much traffic	92	115	98	110	88	93	103
Tourism places strain on local services/amenities such as roadways and emergency services	106	119	95	104	85	91	101
The tax revenue generated by tourism helps pay for services my community needs	97	98	100	106	98	101	101
Tourism is causing too many people to move here	100	111	103	107	89	91	99
There are too many tourists coming to my area	96	120	98	109	92	87	97
There is too much tourism in my community	104	119	96	109	87	88	97
Tourism only helps the large businesses in my community	101	93	104	97	104	103	97
I/my family benefit personally from tourism spending	106	113	92	102	96	95	97

# Tourism Promotion by Region

- Attitudes relating to tourism promotion exhibit some of the greatest stability across regions, with the exception of some negativity in the White Mountains and Lakes regions, who suggest it limits their own enjoyment of the region's access and have associated resistance to continued promotion. Even so, only 20% in those areas agree that advertising is a waste of money.

Region	Great North Woods	White Mountains	Dartmouth Lake Sunapee	Lakes	Monadnock	Merrimack Valley	Seacoast
Promoting New Hampshire as a place to visit makes people more aware of all that New Hampshire has to offer	102	99	97	103	99	101	99
Promoting my community as a place to visit attracts customers for local businesses	98	103	100	104	97	97	101
Advertising to attract visitors generates a good return on investment	105	97	94	104	99	103	98
Tourists will continue to come to my community even if we stopped all tourism advertising	92	101	107	105	95	98	102
Tourism promotion has increased my pride in New Hampshire as a destination	108	93	98	98	97	105	101
The taxes generated when visitors spend money should be partially reinvested to pay for marketing the area for tourism	103	94	97	98	105	104	99
Tourism promotion has limited my access to certain amenities such as parks, public spaces, and recreation areas	98	122	93	109	87	91	100
We shouldn't be trying to attract additional tourists to the community	99	109	95	113	95	93	96
Advertising to bring visitors to my community is a waste of money	100	98	107	99	98	97	101

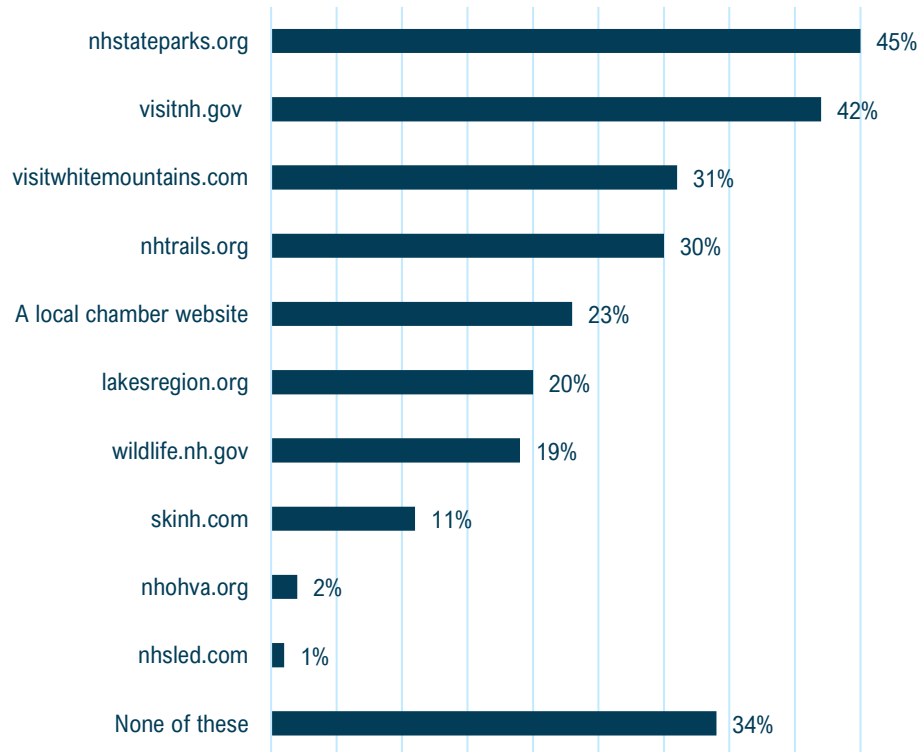
## Miscellany

# Residency Characteristics

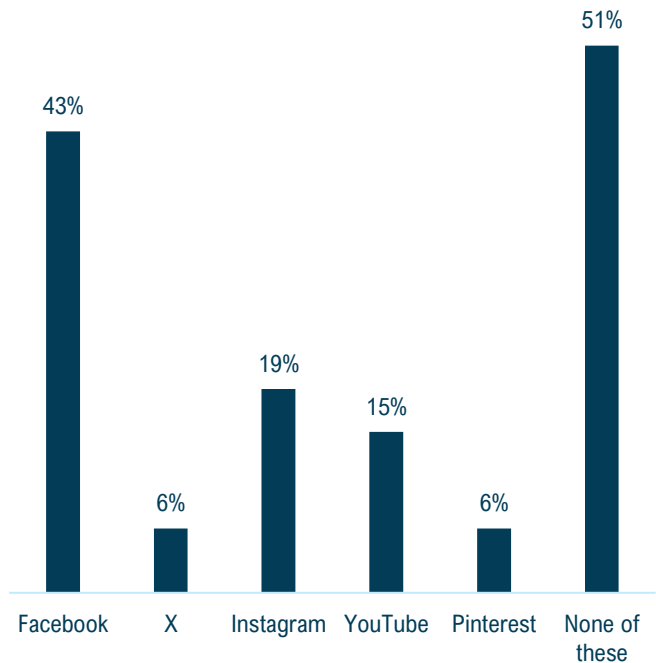
- None of the findings reviewed here have been considered in terms of unique residency characteristics like length of time in New Hampshire or home ownership. The reason for this is that the population is reasonably homogenous.
  - 96% year-round residents
  - 31 years average state residency
  - 71% primary residence homeownership
  - 5% own a second home
  - 24% renters
  - 77% not involved in tourism industry
  - 12% directly involved

# Website Behavior

## Use of State and Local Website Resources



## Social Networks used to Follow Visitnh



# Appendix

# Questionnaire

SMARInsights

New Hampshire  
2024 Resident Sentiment  
October 2024

The following survey is about New Hampshire. New Hampshire, in this survey, includes all cities, towns, and neighborhoods throughout the state.

S1. Do you live in New Hampshire at least part of the year?  
Yes  
No [→ TERMINATE]

S1a. What is your ZIP code in New Hampshire? \_\_\_\_\_

S2. How long have you been a resident of New Hampshire? \_\_\_\_\_ years

Please round to the nearest year. If you have lived here less than a year, please enter 1.

S3. Do you live here year-round?  
Yes  
No

S4. Do you...? Select all that apply  
Own your primary residence in New Hampshire  
Own a second/vacation property in New Hampshire  
Rent a property in New Hampshire  
Other, specify \_\_\_\_\_

S5. What is your age? \_\_\_\_\_ [IF UNDER 18 → TERMINATE]

## QUALITY OF LIFE

Q1. How much do you agree with this statement? I am proud of the state where I live.

Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree
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Q2. How much do you agree with this statement? I am proud of the city or town where I live.

Strongly disagree	Somewhat disagree	Neither agree nor disagree	Somewhat agree	Strongly agree
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Q3. How much do you agree that each of these statements describes New Hampshire? [ROTATE]

	Strongly disagree	2	3	4	Strongly agree
A good place to live					
A good place to start a career					
A good place to start a business					
A good place to retire					
A good place to raise a family					
A good place to attend college					

A good place to expand a business					
A good place to visit for a weekend getaway or vacation					
A good place to hold a meeting or convention					
A good place to live and work remotely					
A good place to work					
A good place to have a wedding					

Q4. Thinking about New Hampshire **as a place to live**, how much do you agree that New Hampshire has or is each of the following? [ROTATE]

[ROTATE]	Strongly disagree	2	3	4	Strongly agree
Fun					
Exciting					
Always has something new to discover					
Beautiful					
Rich in culture and the arts					
A good place for culinary activities					
A good place for agritourism such as U-pick farms, farm tours					
Has great state parks					
Offers lots of outdoor recreation					
Safe					
Is a kid-friendly vacation destination					
Is easy to get to					
Is unique because of the variety of destinations and activities it offers					
Has interesting historical sites and museums					
A great place for winter sports such as skiing and snowmobiling					
A good place for shopping					
A good place to vacation when traveling without children					
Affordable					
A good place for fairs and festivals					
A good place to go to the beach					
A good place for water activities					
Relaxing					
Romantic					
Excellent restaurants					
Natural beauty and scenic landscapes					
Offers a clean and healthy environment					
Charming					
Friendly people and welcoming atmosphere					
A good place for me to stroll around					

A good value for my money					
A good place for a road trip					
Has a variety of landscapes					

Q6. How much benefit does the state of New Hampshire receive from tourism? Would you say the state receives...?  
1. A great deal of benefit from visitors to the area?  
2. Some benefit from visitors to the area?  
3. No benefit from visitors to the area?

## TOURISM SENTIMENT

Q7. What is your overall perception of the travel and tourism industry within New Hampshire?

1	2	3	4	5	6	7	8	9	10
Negative									Positive

Q7a. What is your overall perception of the travel and tourism industry within your local area?

1	2	3	4	5	6	7	8	9	10
Negative									Positive

Q8. For each of the following statements concerning tourism and your community, please indicate whether you agree or disagree with the statement. [ROTATE POSITIVE AND NEGATIVE]

ROTATE	Strongly Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Strongly Agree
Tourism provides jobs in my community					
The tax revenue generated by tourism helps pay for services my community needs					
More tourism is generally a good thing					
Tourism helps the local businesses in my community					
I enjoy the attractions and businesses that are here because of tourism					
The money visitors spend in my community is important to the economy					
Tourism shows people that my community is a good place to relocate					
There is too much tourism in my community					
Tourism only helps the large businesses in my community					
There are too many tourists coming to my area					
Tourism is creating too much traffic					
Tourism is causing too many people to move here					
My family benefit personally from tourism spending					
Tourism enhances New Hampshire's identity					
Tourism places strain on local services/amenities such as roadways and emergency services					

# Questionnaire

Tax revenue from tourism helps to offset local property taxes						
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Q8a. How would you describe your experience with visitors to New Hampshire?

Positive  
Neutral  
Negative

8b. Why has your experience with visitors to New Hampshire been ANSWER FROM Q8A? \_\_\_\_\_

Q9. For each of the following statements concerning tourism promotion (marketing the area for tourism) in your community, please indicate whether you agree or disagree with the statement. [ROTATE POSITIVE AND NEGATIVE]

TOURISM PROMOTION	Strongly Disagree	Somewhat Disagree	Neither Agree nor Disagree	Somewhat Agree	Strongly Agree
Advertising to attract visitors generates a good return on investment					
Promoting my community as a place to visit attracts customers for local businesses					
The taxes generated when visitors spend money should be partially reinvested to pay for marketing the area for tourism					
Promoting New Hampshire as a place to visit makes people more aware of all that New Hampshire has to offer					
Advertising to bring visitors to my community is a waste of money					
Tourists will continue to come to my community even if we stopped all tourism advertising					
We shouldn't be trying to attract additional tourists to the community					
Tourism promotion has limited my access to certain amenities such as parks, public spaces, and recreation areas					
Tourism promotion has increased my pride in New Hampshire as a destination					

Q12. Do you ever use the website visitnh.gov as a resource for events and things to do?

1. Yes  
2. No

Q13. Do you ever use these websites for events, things to do and other travel information? ROTATE, ANCHOR "NONE"

visitwhitemountains.com

lakeregion.org  
nhstateparks.org  
nhtrails.org  
skinh.com  
nhstied.com  
visitnh.com  
nhchva.org  
A local chamber website  
None of these

Q14. Which of the following social networks do you follow visitnh on?

Facebook  
X (formerly Twitter)  
Instagram  
YouTube  
Pinterest  
None of these

## Demographics

Are you currently ...?

Married/Living as married  
Divorced/Separated  
Widowed  
Single/Never married

Including you, how many people are currently living in your household? \_\_\_\_\_ [If 1, SKIP TO D4]

How many living in your household are children under the age of 18? \_\_\_\_\_

Which of the following categories represents the last grade of school you completed?

High school or less  
Some college/technical school  
College graduate  
Post-graduate degree

How would you describe your gender?

Male  
Female  
Non-binary  
Prefer not to answer

Which of the following best describes your race or ethnicity? Are you ...?

Select all that apply.  
White  
Hispanic or Latino  
Black or African American  
Asian  
American Indian or Alaska Native  
Middle Eastern or North African  
Native Hawaiian or Other Pacific Islander

Which of the following categories best represents the total annual income for your household before taxes?

Less than \$50,000  
\$50,000 but less than \$75,000  
\$75,000 but less than \$100,000  
\$100,000 but less than \$150,000  
\$150,000 but less than \$250,000  
\$250,000 or more

Please describe your working status.

Work full-time  
Work part-time  
Self-employed  
Retired  
Not currently employed

Please indicate whether you are employed in any of the following industries. (Select all that apply)

Retail  
Restaurant/food service  
Lodging/rentals  
Transportation rental & gas  
Professional services  
Government  
Tourism  
Other, specify \_\_\_\_\_

What is your level of interaction with New Hampshire tourism?

My job or a close family member's job depends directly on tourism; I/they work at a restaurant, attraction, accommodation, etc.  
My job or a close family member's job is indirectly supported by tourism.  
My job or a close family member's job is not related to tourism

## CLOSING

This survey is being conducted by an independent research company on behalf of New Hampshire as one step in receiving input and feedback from residents. This survey, and other ways of listening, will help to create community-centered tourism and marketing efforts and provide information to improve New Hampshire.

Q16. Is there anything you would like to share with New Hampshire? [Text box entry]

END OF SURVEY