Residents' Perceptions of and Attitudes towards Tourism in the Upper Valley Region of New Hampshire and Vermont

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Executive Summary

This document presents survey responses provided by residents from New Hampshire and Vermont's Upper Valley Region. The results presented here provide general indications of community residents' perceptions and participation in tourism and recreation activities, to be used in discussions with local tourism organizations and community leadership.

Local residents who had visited one or more of the other counties in the Upper Valley Region for recreational purposes mentioned Windsor County most frequently (53.7%), followed by Grafton County (48.7%), and Merrimack County (38.3%). Orange County (34%) and Sullivan County (29.1%) were also commonly visited, and 8.3% of respondents indicated that they had not traveled to other counties for leisure. These responses are confirmed in the county visitation statistics.

King Arthur Baking Café/Store/School, Lebanon Opera House, and Northern Stage Theater were the most visited specific attractions within the region, followed by the Vermont Institute of Natural Science and Billings Farm & Museum. Outdoor recreational sites like Gile Mountain hiking trails, Upper Valley recreational trails, and the Connecticut River (for boating) were also frequently visited. Among festivals and events, the Quechee Balloon Festival (13.2%) and Montshire Museum of Science (32.3%) were commonly mentioned.

Most residents who visited other areas from within the region for leisure (79.4%) spent $200 or less during their most recent trip. A small percentage (6.3%) stayed overnight, with one night being the most common (50.0%). Overnight stays were most frequently in a hotel, motel, or inn (50.0% of cases), followed by Airbnb and staying with friends and/or relatives (both 16.7%). RVs and camping/tents both accounted for 11.1% of cases, while second homes, bed & breakfasts, and rented houses/apartments/VRBO each accounted for 5.6% of cases.

"Environmental quality" (air, water, other resources), "protection of the natural environment," "management of waste," and "control of negative impacts through long-term planning" ranked as the most important indicators of tourism sustainability in the Upper Valley Region. "Improvement of the well-being of rural communities from tourism development" and "economic opportunities from tourism development" were also highly ranked. Two other important indicators were "celebration and protection of intangible cultural heritage, including local traditions, arts, music, language, food and other aspects of local identity and distinctiveness" and "management of overcrowding."

A gap analysis of residents' perceptions of the importance of indicators compared to how well these indicators are currently perceived to perform within the Upper Valley Region reveals where the communities need to "keep up the good work" or "concentrate efforts." Residents felt best about "environmental quality," in that this was important to them, and the community was also performing well on this indicator. "Protection of the natural environment," "rural authenticity," "management of waste," and "celebration and protection of intangible cultural heritage, including local traditions, arts, music, language, food and other aspects of local identity and distinctiveness" were also areas in which the region could be encouraged to keep up the good work.

Residents evaluated the region's "environmental quality," "protection of the natural environment," "management of waste," and "rural authenticity" highest regarding both their importance and performance, indicating these as areas to "keep up the good work." In contrast, residents perceived the most need for improvement in "control of negative impacts through long-term planning," "improvement of the well-being of rural communities," and "local leaders' support for tourism development."

Local resident attitudes towards recreation and tourism development were generally positive. They strongly agreed that "tourism development will provide economic opportunities for the area." Meanwhile, they disagreed that "tourism will only produce low-paying jobs" or that it "will increase traffic, crime, or pollution,", while agreeing that "long-term planning and managed growth are important."

In terms of competitiveness, residents viewed "level of crowding," "rural tranquility and authenticity," and "prices" as areas where the Upper Valley Region outperforms comparable destinations. However, they felt that "infrastructure," "accessibility," and "resource conservation" lag behind other places.

While some respondents expressed concerns about tourism growth, many recognized the potential for economic benefits and the need for strategic development. Residents emphasized the importance of community involvement and effective destination management to ensure that tourism benefits are widely shared while negative impacts are minimized. There is clear recognition among those responding that investments in tourism and recreation are needed, but also that safeguards need to be in place to avoid the problems and negative side effects associated with "overtourism." Respondents also indicated that there is a lack of current leadership capacity and funding in this regard, and that a strategic and coordinated approach to destination management is important to ensure a stable and sustainable form of tourism development with benefits accruing to a broad segment of the local population.

Preliminary Survey Results

1. Introduction

This report presents the results of a survey of residents in the Upper Valley Region conducted by West Virginia University and Penn State University faculty and staff, in collaboration with the Northeast Regional Center for Rural Development. The report accompanies a similar document summarizing the results of a survey of visitors to the Upper Valley area (Deng, Arbogast, Zhuang and Goetz, 2024), which provides more context for the study. Like the visitor survey, this survey of local residents in the five-county region was administered by our collaborators with the Upper Valley Business Alliance, UNH Extension and Vermont Extension starting in the Spring of 2024. With retrospective questions, it allows for comparisons to be made to the periods pre, during and post the Covid-19 pandemic. As elaborated below, the survey was designed to elicit sociodemographic background information on respondents, current tourism and recreation-related activities pursued, residents' perceptions of and attitudes towards such activities, and basic information about other tourism destinations these residents have visited, as well as their sense of how "competitive" the Upper Valley Region area is compared to those other destinations. The report is organized as follows: the first section describes the methods, followed by the detailed results, including an assessment of various tourism sustainability performance indicators and the final section presents a conclusion resulting from the findings of the survey instruments.

2. Methods

2.1 Questionnaire

A questionnaire was designed and administered to elicit the opinions and attitudes of residents in the Upper Valley area about tourism and recreational activities in the region, following a thorough review of the relevant literature and with input from the research team.

External reviewers, including tourism leaders in the targeted destinations, were then invited to comment on the survey. The resulting questionnaire consisted of eight sections: 1) background information, 2) leisure, vacation, and recreation activities, 3) perceptions of tourism sustainability indicators, including their importance and performance, 4) attitudes toward recreation/tourism, 5) perceptions of relative competitiveness of the Upper Valley area relative to other destinations, and 6) socio-demographic variables. The questionnaire was reviewed and approved by the West Virginia University Institutional Review Board (2211673418).

2.2 Data Collection and Analysis

The questionnaire for this study was built in Qualtrics, an online survey platform. The target study area was predetermined to include populations in the five counties' geographic boundaries that contain portions of, or surround, the area of the Upper Valley in New Hampshire and Vermont. The survey was distributed to prospective participants through stakeholders and community channels (e.g., social media groups, flyers, newsletters), whereby initial screening questions filtered in only participants who resided within these identified counties.

The survey opened and began accepting responses on May 2, 2024, and was closed to new response collection on February 4, 2025. This report includes responses from 483 prospective participants; of this number, 42 had to be removed due to systematically incomplete responses filtered by early prescreening questions, resulting in 441 valid responses (91.3%) for further analysis. This report presents descriptive findings; a future study will include regression analysis of the data to generate additional insights.

It should be noted with these results that the percentages from each county should not be used as representative of the entire county populations, as they do not necessarily reflect the actual distributions of county populations.

3. Results

3.1 Demographics of Resident Respondents

Of the 441 valid responses, the majority of respondents identified as female (63.16%), while 28.42% identified as male. A smaller proportion of respondents identified as non-binary (2.63%), while 5.79% either selected "other" or "prefer not to say" (Figure 1).

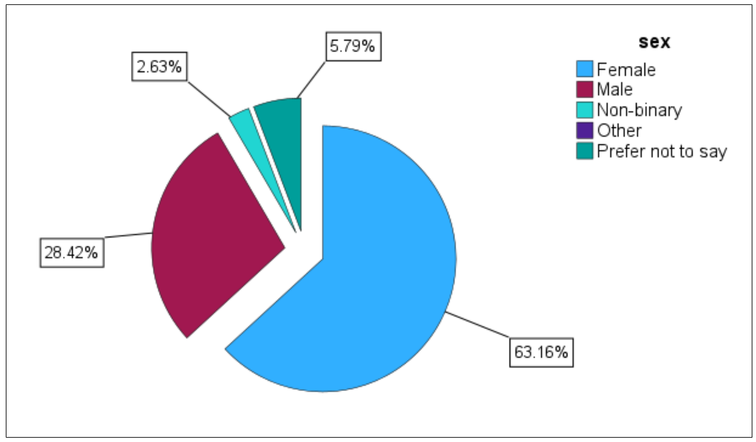

Figure 1. Respondents by sex

Most respondents were between 25 and 64 years old, accounting for over 75% of the total. Specifically, 9.47% of respondents were aged 25-34, 18.95% were 35-44, 15.79% were 45-54, and 18.95% were 55-64. The largest proportion of respondents fell in the 65+ category (32.63%), while a small percentage (1.58%) were between 18-24 years old. Additionally, 2.63% of respondents preferred not to disclose their age (Figure 2).

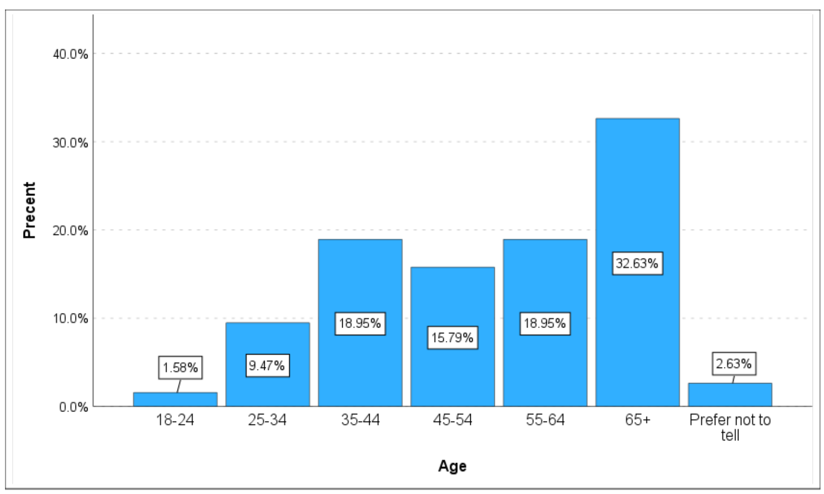

Figure 2. Respondents by age

Figures 3 and 4 show respondents' characteristics in terms of education and household income, respectively. Most respondents were well-educated, with over 91% having some level of college education. Specifically, 6.84% had attended some college, 41.05% held an undergraduate or post-secondary degree, and 50.00% had a graduate school degree. A small proportion (2.11%) of respondents had a high school degree or equivalent, while no one had less than a high school degree (Figure 3).

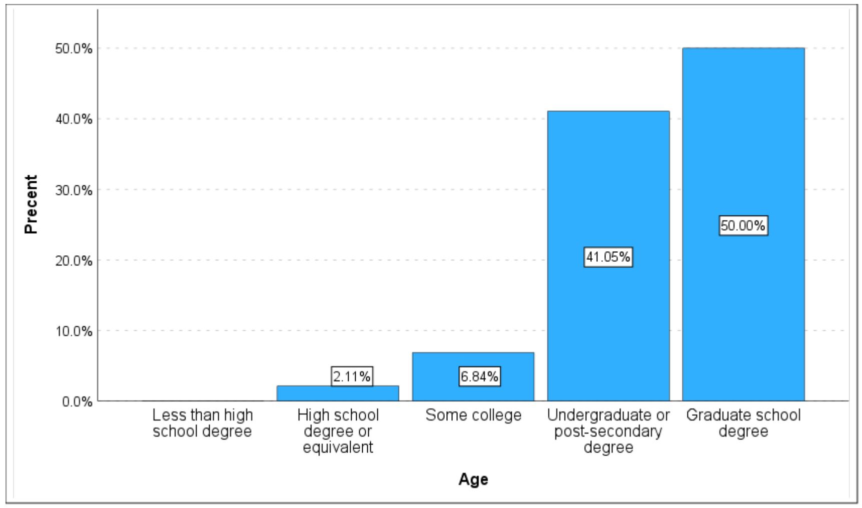

Figure 3. Respondents by education

In terms of pre-tax household income, approximately 30.32% of respondents reported earning less than $80,000. The remaining 69.68% of respondents reported an income of $80,001 or more. This includes 9.04% earning between $80,001 and $100,000, 25.53% between $100,001 and $150,000, 16.49% between $150,001 and $200,000, 7.98% between $200,001 and $250,000, 6.38% between $250,001 and $300,000, and 4.26% earning more than $300,000. And 2.13% earned less than $20,000, 6.91% earned between $20,001 and $40,000, 8.51% earned between $40,001 and $60,000, and 12.77% earned between $60,001 and $80,000 (Figure 4).

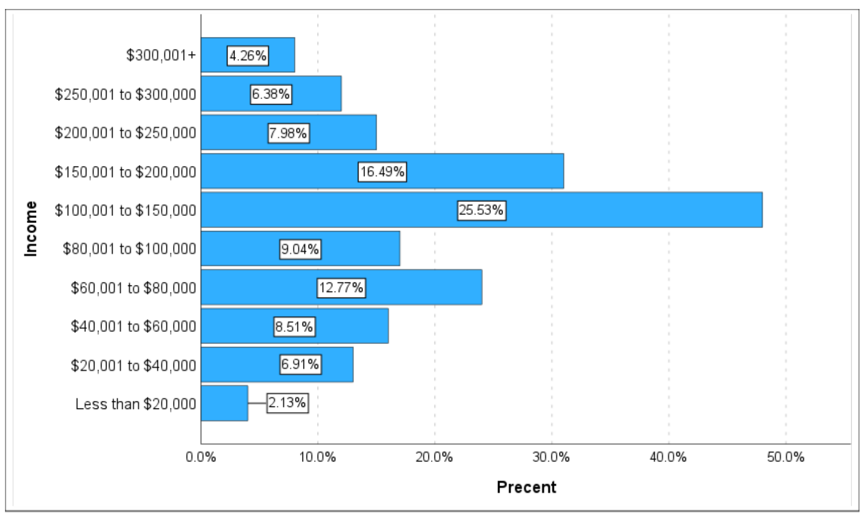

Figure 4. Respondents by income

3.2 Other Respondent Characteristics

3.2.1. Respondents' Counties

Figure 5 illustrates the distribution of respondents across different counties in the Upper Valley Region. Two of the counties, Grafton (30.98%) and Sullivan (36.67%), accounted for the majority of responses, representing over 67% of the total. Other notable counties include Windsor (20.27%), Orange (7.74%), and Merrimack (2.05%). A small proportion (2.28%) indicated that they do not live in one of the listed counties (Figure 5), and were excluded from further analysis.

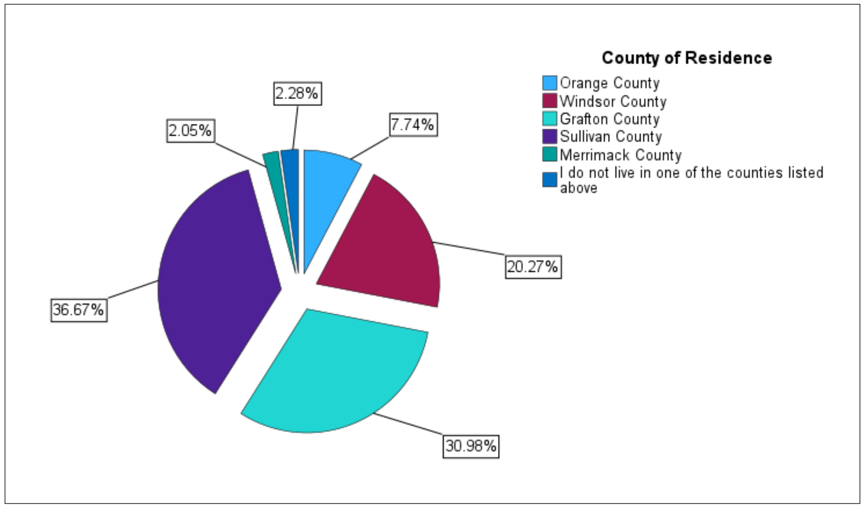

Figure 5. Respondents by County of Residence

3.2.2. Community Role

Table 1 presents the roles that respondents perform and/or identify with within their communities. Respondents were asked to select all that apply, which is reflected in the percentage of cases reporting. Among the reported community roles, the vast majority (87.2%) of respondents identified themselves as "residents" of the region. This was followed by "non-recreation/tourism related employment" (21.8%), "non-recreation/tourism related local or county board" (15.4%), and "recreation/tourism related local or county board" (12.2%). Additionally, 9.6% of respondents indicated that they were "government officials," while 8.0% reported being "non-recreation/tourism related business owners," and 4.8% identified as "recreation/tourism-related business owners." A small percentage (3.7%) reported that they were a "second homeowner," and 9.0% reported their role as "other."

Table 1. Role in Community (Multiple Responses Allowed)

	Responses		Percent of
	N	%	Cases
Resident	164	50.0	87.2
Non-recreation/tourism related employment	41	12.5	21.8
Non-recreation/tourism related local or county board	29	8.8	15.4
Recreation/tourism related local or county board	23	7.0	12.2
Government official	18	5.5	9.6
Other (please specify)	17	5.2	9.0
Non-recreation/tourism related business owner	15	4.6	8.0
Recreation/Tourism-related business owner	9	2.7	4.8
Second home owner	7	2.1	3.7
Employed by recreation/tourism	5	1.5	2.7
Total	328	100.0	174.5

Note: The 188 respondents on average listed 1.74 roles in the community (174.5/100)."Percent of responses" is calculated by dividing the number of times an answer option was selected by the total number of responses to that question across all participants, regardless of whether they selected other options as well. This metric indicates which answer option was most frequently chosen overall, especially for multiple-response questions where individuals could select more than one answer. "Percent of cases" reflects the proportion of participants in the dataset who chose a particular answer option, considering each participant only once.

Respondents were further asked to report which of the community roles they identified with they considered to be their primary role within the community, results of which are shown in Figure 6. In alignment with the results in Table 1, "resident" was the most commonly reported primary community role (74.14%). The next highest primary community role was

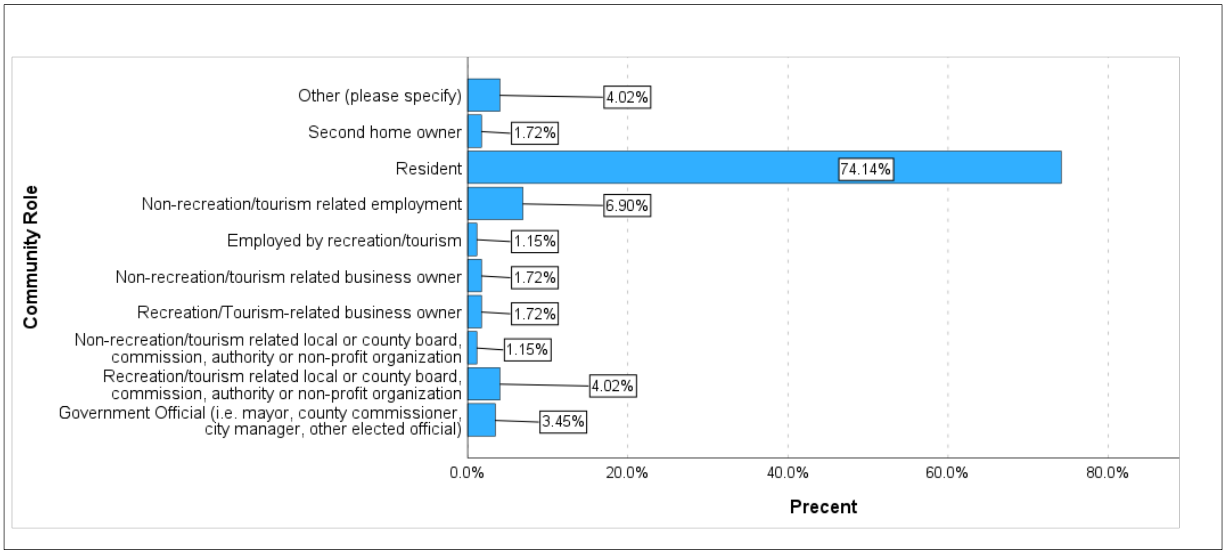

Figure 6. Respondents' Community Role

"non-recreation/tourism related employment" (6.90%), followed by "recreation/tourism related business owner" (1.72%), "non-recreation/tourism related business owner" (1.72%), and "government official" (3.45%). A small percentage of respondents identified their primary role as "recreation/tourism related local or county board, commission, authority or non-profit organization" (4.02%), or "non-recreation/tourism related local or county board, commission, authority or non-profit organization" (1.15%). "Second home owner" and "employed by recreation/tourism" were the least reported primary roles (1.72% and 1.15%, respectively). Additionally, 4.02% of respondents reported their primary community role as "other".

3.2.3. Places Visited

Table 2 presents the counties that respondents visited for leisure during their most recent trips to or within the Upper Valley area, outside of their county of residence. Windsor County, VT was the most frequently visited for leisure (53.7%), followed closely by Grafton County, NH (48.7%) and Merrimack County, NH (38.3%). Sullivan County, NH and Orange County, VT were also commonly mentioned, with 29.1% and 34.0% of respondents reporting visits, respectively. Additionally, 8.3% of respondents indicated that they had not traveled to any county outside of their own for leisure, vacation, or other recreation activities within the last 12 months.

Table 2. Other Counties Visited for Leisure Outside of Resident County

Places visited	Responses N	Responses %	Percent of Cases
Windsor County, VT	227	24.1	53.7
Grafton County, NH	206	21.9	48.7
Merrimack County, NH	162	17.2	38.3
Orange County, VT	144	15.3	34.0
Sullivan County, NH	123	13.1	29.1
I have not visited other counties for leisure, vacation, or other recreation activities	78	8.3	18.4
Total	940	100.0	222.2

Figure 7 illustrates the frequency of visits to other counties for leisure (within the past 12 months) for those respondents who reported leisure trips to other counties (Table 2). Half (50.15%) of the respondents reported taking leisure trips to other counties 10 or more times in the last year. A considerable portion (approximately 40%) reported taking leisure trips 2 to 6 times within the past 12 months, with 3, 4, 5, and 6 times being the most frequently mentioned (7.37%, 9.44%, 9.44%, and 9.73%, respectively). A small percentage of respondents took only 1 trip (2.06%), and even fewer reported traveling 9 times (1.18%) in the past year.

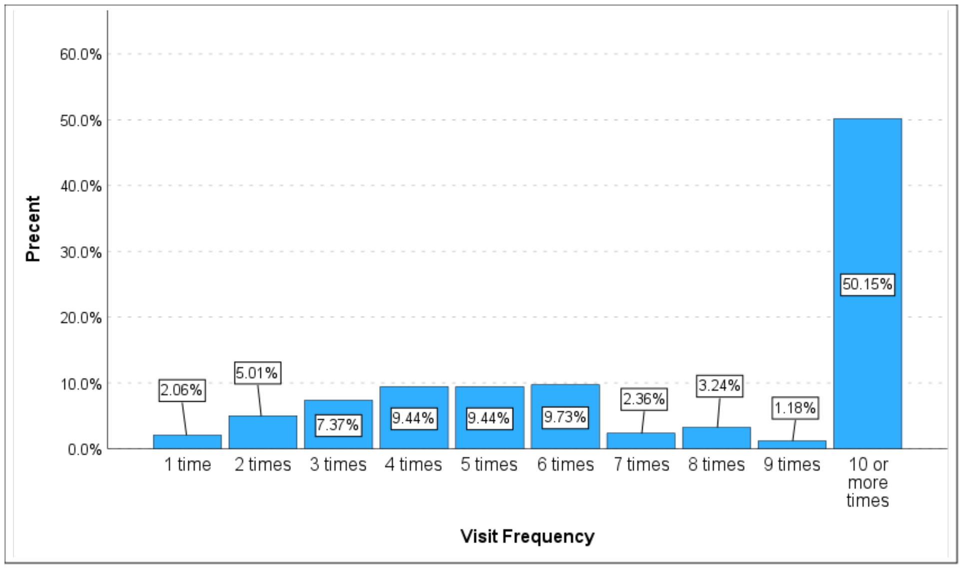

Figure 7. Frequency of Visits to Other Counties

Respondents were asked to report whether they had visited certain attractions within the Upper Valley Region, with the results presented in Table 3. The most visited locations included King Arthur Baking Cafe/Store (71.5%), Lebanon Opera House (45.5%), Northern Stage Theater (39.5%), and the Vermont Institute of Natural Science (35.7%). Other frequently visited attractions included Billings Farm & Museum (27.6%) and Mascoma Lake (26.3%). In addition to these venues, outdoor recreation was well-represented among commonly visited sites. Notable destinations included hiking at Gile Mountain and Upper Valley trails (37.0%), Mascoma Lake (26.3%), and boating on the Connecticut River (23.8%). Boston Lot Conservation Land for mountain biking (21.9%) and Cardigan Mountain (22.6%) were also popular. Science and cultural attractions such as the Montshire Museum of Science (32.3%) and The Hopkins Center for the Arts (31.7%) received relatively high visitation. The visitation rates for other notable sites in the region were: Whaleback Mountain Ski Area (16.3%), Grafton Pond - kayaking (15.7%), Quechee Balloon Festival (13.2%), and Storrs Hill Skiway (6.3%).

Table 3. Places visited for leisure in the Upper Valley Region

	Responses		Percent of
	N	%	Cases
King Arthur Baking Cafe/Store - Norwich VT	228	11.3	71.5
Lebanon Opera House (live shows/performances) - Lebanon NH	145	7.2	45.5
Northern Stage Theater - White River Junction VT	126	6.3	39.5
Selected Choice Others (please specify)	121	6.0	37.9
Hiking - Gile Mountain, trails of Upper Valley trails Alliance/ Hanover Conservancy lands - VT/NH	118	5.9	37.0
Vermont Institute of Natural Science - Quechee VT	114	5.7	35.7
Montshire Museum of Science - Norwich VT	103	5.1	32.3
The Hopkins Center - theater at Dartmouth College - Hanover NH	101	5.0	31.7
Simon Pearce Glassblowing/Store/Restaurant - Quechee VT	101	5.0	31.7
Billings Farm & Museum - Woodstock VT	88	4.4	27.6
Mascoma Lake - boating, swimming - Enfield NH	84	4.2	26.3
Boating on Connecticut River (kayaking/rowing) VT/NH	76	3.8	23.8
Storr's Pond Recreation Area - hiking, swimming, summer camps - Hanover NH	75	3.7	23.5
Cardigan Mountain - hiking - Orange NH	72	3.6	22.6
Boston Lot conservation land - mountain biking trails - Lebanon NH	70	3.5	21.9
Appalachian Trail - NH/VT	69	3.4	21.6
AVA Gallery - art galleries/studios/classes - Lebanon NH	67	3.3	21.0
First Friday in White River Junction - VT	54	2.7	16.9
Whaleback Mountain Ski Area - Enfield NH	52	2.6	16.3
Grafton Pond - kayaking - Grafton NH	50	2.5	15.7
Quechee Balloon Festival - Quechee VT	42	2.1	13.2
Opera North at Blow Me Down Farm in Cornish (outdoor venue for Opera North performances under a big top tent) - Cornish NH	40	2.0	12.5
Storrs Hill Skiway - ski jumping/lessons - Lebanon NH	20	1.0	6.3
Total	2016	100.0	632.0

Respondents were provided with an interactive digital map of the Upper Valley Region and asked to click on the approximate locations of the places they had visited during their most recent trip to the area (with a maximum 10 clicks each). Figure 8 shows a heat map of the most popular subregions as determined by the frequency of clicks (red representing the most clicked areas).

Table 4. Heat Map Region (Town) Selection Frequency

	Responses		
	N	%	Percent of Cases
Lebanon	188	10.0	66.9
Hanover	179	9.5	63.7
Hartford	159	8.5	56.6
Norwich	145	7.7	51.6
Woodstock	133	7.1	47.3
Enfield	109	5.8	38.8
Plainfield	91	4.8	32.4
Lyme	89	4.7	31.7
Cornish	83	4.4	29.5
Windsor	82	4.4	29.2
Fairlee	68	3.6	24.2
Thetford	66	3.5	23.5
Grantham	61	3.2	21.7
Hartland	58	3.1	20.6
Canaan	48	2.6	17.1
Pomfret	42	2.2	14.9
Orford	34	1.8	12.1
Springfield, VT	31	1.7	11.0
Grafton	30	1.6	10.7
Royalton	29	1.5	10.3
Orange	26	1.4	9.3
Sharon	26	1.4	9.3
Other	26	1.4	9.3
Strafford	25	1.3	8.9
West Fairlee	24	1.3	8.5
Piermont	15	0.8	5.3
Vershire	10	0.5	3.6
Total	1877	100.0	668.0

Table 4 summarizes the distribution of heat map clicks across town-defined regions. The most frequently selected cities/towns were Lebanon (66.9%), Hanover (63.7%), and Hartford (56.6%), indicating that these areas were among the most popular destinations within the Upper Valley Region. Other highly selected areas included Norwich (51.6%) and Woodstock (47.3%). Areas with moderate levels of engagement (between 20% and 40% of cases) included Enfield (38.8%), Plainfield (32.4%), Lyme (31.7%), Cornish (29.5%), Windsor (29.2%), Fairlee (24.2%), and Thetford (23.5%). Additional areas in this range were Grantham (21.7%) and Hartland (20.6%).

In contrast, less frequently selected towns (under 20% of cases) included Canaan (17.1%), Pomfret (14.9%), Orford (12.1%), Springfield, VT (11.0%), Grafton (10.7%), Royalton (10.3%), Orange (9.3%), Sharon (9.3%), Strafford (8.9%), West Fairlee (8.5%), Piermont (5.3%), and Vershire (3.6%).

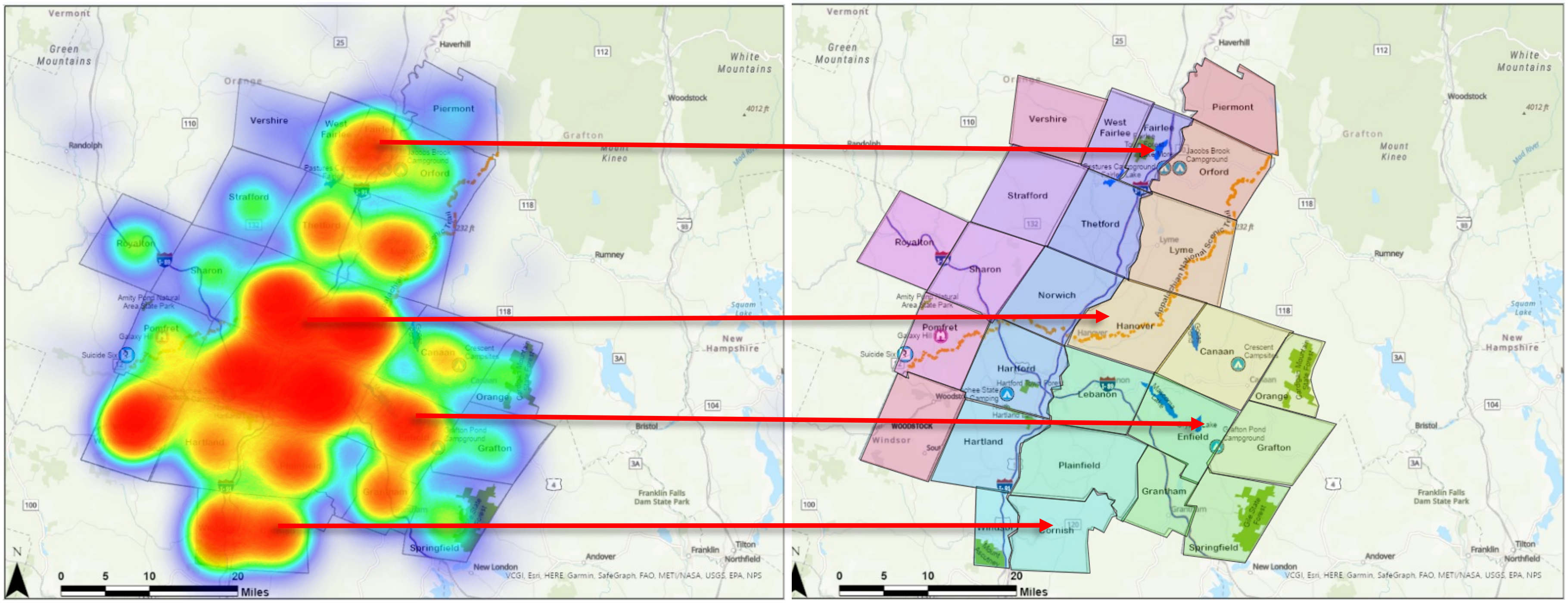

Figure 8. Heat Map of Areas Visited for Leisure

3.2.4. Activity Participation

Table 5 presents activities that respondents participated in during their most recent trip to the region. The most frequently reported activities were food and drink experiences (75.1%), visiting farms/farmers markets (74.1%), fairs & events (66.3%), and shopping (67.3%). Additionally, hiking (62.0%), swimming (40.1%), rail-trail/road biking (39.1%), viewing wildlife (39.7%), and sightseeing (36.4%) were also common activities among respondents.

Table 5. Activity Participation

	Responses		Percent of Cases
	N	%	
Food & drink experiences	223	9.1	75.1
Farms/farmers markets	220	9.0	74.1
Shopping	200	8.2	67.3
Fairs & events	197	8.1	66.3
Performing arts	188	7.7	63.3
Hiking	184	7.5	62.0
Swimming	119	4.9	40.1
Viewing wildlife	118	4.8	39.7
Rail-trail/road biking	116	4.7	39.1
Canoeing/kayaking	110	4.5	37.0
Sightseeing	108	4.4	36.4
Leaf peeping	107	4.4	36.0
Downhill skiing/snowboarding	83	3.4	27.9
XC skiing	77	3.2	25.9
Picnicking	74	3.0	24.9
Nightlife	55	2.3	18.5
Other (please specify)	52	2.1	17.5
Backpacking	40	1.6	13.5
Mountain biking	38	1.6	12.8
Fishing	35	1.4	11.8
Civil war sites/historic sites	34	1.4	11.4
Factory tours	28	1.1	9.4
Hunting	12	0.5	4.0
Snowmobiling/ATV/UTV riding	10	0.4	3.4
Geocaching	9	0.4	3.0
Rock climbing/bouldering	6	0.2	2.0
Whitewater rafting	1	0.0	0.3
Total	2444	100.0	822.9

In contrast, activities such as whitewater rafting (0.3%), geocaching (3.0%), and rock climbing/bouldering (2.0%) were engaged in much less frequently. These lower participation rates suggest that while outdoor recreation is popular, certain specialized activities have a more limited appeal among respondents or are not readily available within the region.

Table 6. Favorite Activities Participated in by Respondents

	Frequency	Percent
Hiking	54	18.3
Food & drink experiences	47	15.9
Performing arts	41	13.9
Farms/farmers markets	28	9.5
Fairs & events	18	6.1
Other	17	5.8
Canoeing/kayaking	14	4.7
Rail-trail/road biking	13	4.4
Shopping	13	4.4
Mountain biking	8	2.7
Downhill skiing/snowboarding	7	2.4
XC skiing	7	2.4
Viewing wildlife	6	2.0
Fishing	5	1.7
Sightseeing	5	1.7
Swimming	5	1.7
Civil War sites/historic sites	2	0.7
Hunting	2	0.7
Nightlife	1	0.3
Rock climbing/bouldering	1	0.3
Snowmobiling/ATV/UTV riding	1	0.3
Total	295	100.0

Of these top six activities, hiking, food and drink experiences, performing arts, and fairs & events were also reported as being among the most favorite or primary activities engaged in by respondents (Table 6). Other popular activities included canoeing/kayaking, rail-trail/road biking, and shopping. In contrast, activities such as Snowmobiling/ATV/UTV riding, hunting, and rock climbing/bouldering were not only engaged in less frequently but also not listed as one of the favorite activities.

3.2.5. Spending

Figure 9 presents the distribution of group spending per trip as reported by respondents. The majority (79.44%) of respondents reported group spending between zero to $200 per trip, with the largest share in the $101 to $200 range (28.22%), followed by less than $50 (26.13%) and $50 to $100 (25.09%). A smaller proportion reported spending $201 to $300 (8.36%), while spending above $300 was relatively less common. Notably, spending in higher categories, such as $801 to $900 and above, accounted for less than 1% of responses, indicating that most resident-tourists tend to have relatively modest expenses during their leisure trips.

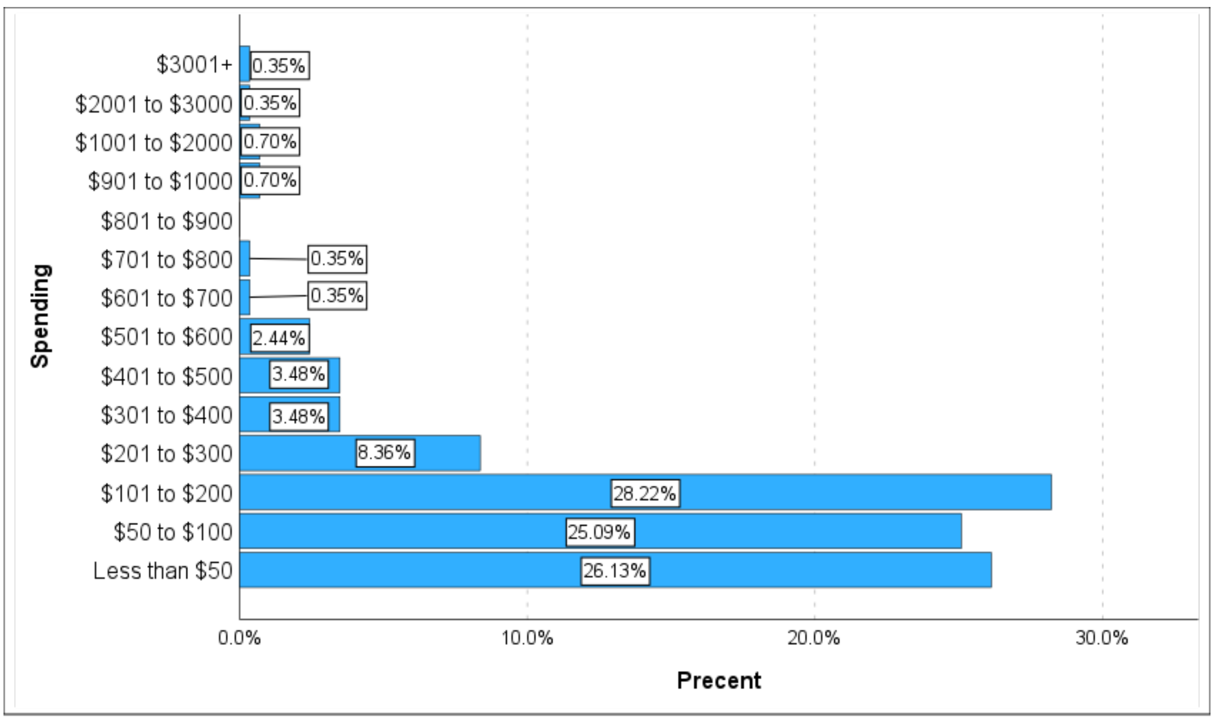

Figure 9. Group Spending on the Most Recent Trip for Leisure

3.2.6. Overnight Stays

The spending patterns shown in Figure 9 align with most respondents visiting other areas in the region only for day trips (93.66%) versus a small percentage (6.34%) staying overnight (Figure 10). Those who stayed overnight were then asked about the number of nights they spent away from home. Figure 11 shows that the majority of respondents stayed for 1 to 3 nights (88.89%), likely due to the availability of short getaways. Fewer respondents stayed for 5 or 7 nights (5.56% each), while no respondents reported staying for 4, 6, 8, 9, or more than 10 nights.

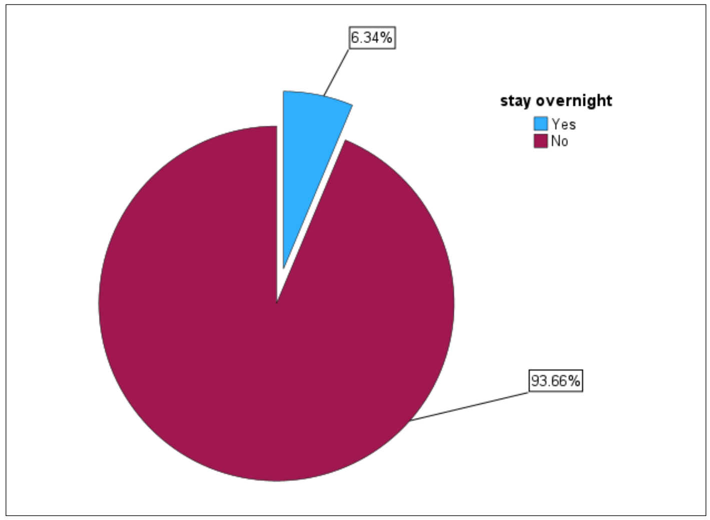

Figure 10. Respondents that Stayed Overnight

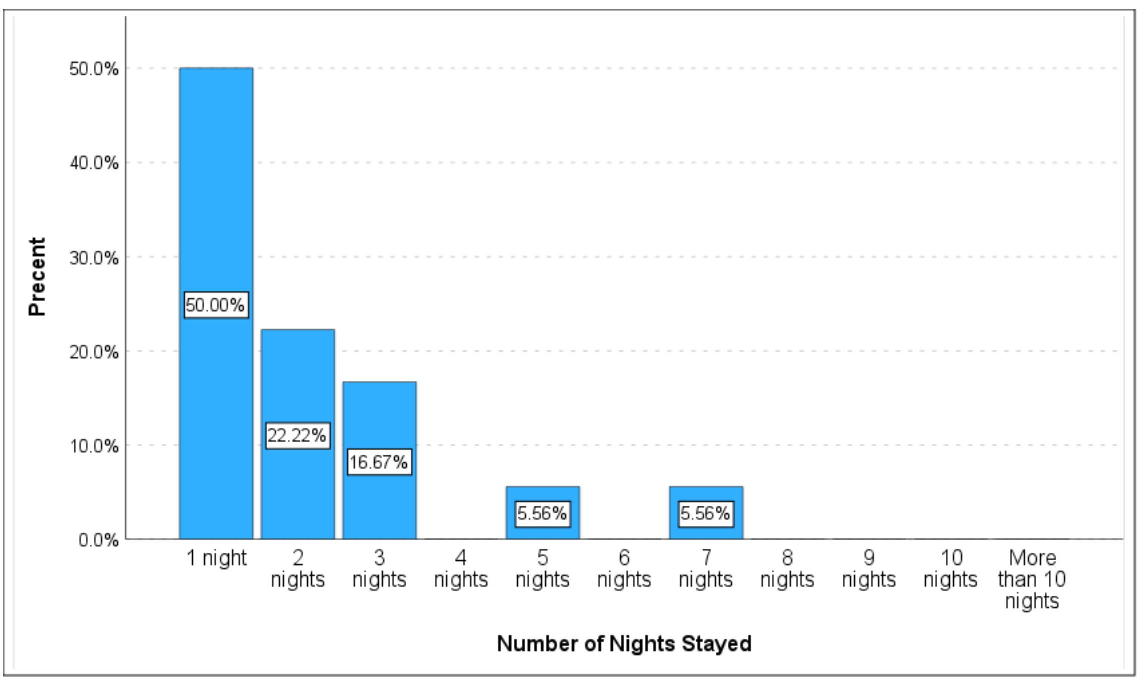

Figure 11. Respondents by Number of Nights Stayed

Table 7 presents respondents' overnight accommodations (outside of their personal home) during their most recent trip, allowing for multiple choices. Half of the cases reported staying in a hotel/motel/inn (50%), followed by Airbnb and friends and/or relatives (both at 16.7%). RVs, camping/tents, and rented houses/apartments/VRBO each accounted for 11.1% of cases. Smaller proportions of respondents reported staying in a second home, a bed & breakfast, or another type of accommodation (each at 5.6%).

Table 7. Types of Overnight Accommodations

	Responses		Percent of Cases
	N	%	
Hotel/motel/inn	9	37.5	50.0
Friends and/or relatives	3	12.5	16.7
Airbnb	3	12.5	16.7
RV	2	8.3	11.1
Camping/tent	2	8.3	11.1
Other (please specify)	2	8.3	11.1
Second home	1	4.2	5.6
Bed & breakfast	1	4.2	5.6
Rented house/apartment/VRBO	1	4.2	5.6
Total	24	100.0	133.3

3.3 Perceptions of Tourism Sustainability Indicators

3.3.1. Importance

Table 8 presents respondents' assessments of 32 sustainable tourism indicators in terms of their importance in the Upper Valley Region, using a Likert scale from 1 (Least Important) to 5 (Most Important). These indicators are categorized into four groups: environmental, socio-economic, cultural, and institutional—each containing multiple items reflecting key aspects of sustainable tourism management. Two key summary statistics are included: the mean (M) of responses and the percentage of respondents who rated the indicator as "important" or "most important" (MI+I). The mean represents the overall sentiment, while the MI+I value highlights the strength of preference among respondents.

Among the highest-rated indicators, "environmental quality" (item 3) received the strongest importance rating, with 92.9% of respondents considering it important or most important (M = 4.59). This was followed by "protection of the natural environment" (item 1; 88.9%, M = 4.57) and "management of waste" (item 6; 82.2%, M = 4.31). Notably, the top-ranked indicators were primarily environmental, underscoring respondents' strong emphasis on environmental sustainability in tourism planning. Among socio-economic indicators, "improvement of the well-being of rural communities from tourism development" (item 11) ranked the highest (76.5%, M = 4.08), while in the cultural category, "rural authenticity" (item 2) was most valued (73.3%, M = 3.94). Conversely, some indicators were rated as less critical. The lowest-rated indicator was "opportunities for visitors to reflect on religious or other spiritual values" (Item 22; 25.1%, M = 2.72), followed by "evidence of links and engagement with other

Table 8. Perceptions of Tourism Sustainability Indicators: Importance

Items	Least Important (%)	Less Important (%)	Neutral (%)	Important (I) (%)	Most Important (MI) (%)	MI +I	Mean (M)	Std. Dev
3. Environmental quality (water, air, resource quality, etc.)	3.7	0.7	2.7	18.9	74.1	92.9	4.59	0.89
1. Protection of the natural environment	4.0	1.3	5.7	11.1	77.8	88.9	4.57	0.96
5. Control of negative impacts through long-term planning	4.1	2.4	9.8	24.1	59.7	83.7	4.33	1.03
6. Management of waste	3.4	2.4	12.1	24.6	57.6	82.2	4.31	1.00
11. Improvement of the well-being of rural communities from tourism development	3.0	6.4	14.1	32.2	44.3	76.5	4.08	1.05
8. Management of overcrowding	2.0	6.8	20.0	27.1	44.1	71.2	4.04	1.05
2. Rural authenticity	3.0	4.7	18.9	35.1	38.2	73.3	4.01	1.02
17. A policy and system to evaluate, rehabilitate, and conserve cultural assets, including built heritage and cultural landscapes	3.8	4.1	21.5	30.0	40.6	70.6	4.00	1.06
18. Celebration and protection of intangible cultural heritage, including local traditions, arts, music, language, food and other aspects of local identity and distinctiveness	3.7	4.7	21.0	30.5	40.0	70.5	3.98	1.07
21. Optimize visitor flow and minimize adverse impacts in cultural sites	2.7	7.5	17.8	32.5	39.4	71.9	3.98	1.06
20. Guidelines for visitor behavior at sensitive sites and cultural events being made available to visitors	6.1	5.1	17.3	28.5	43.1	71.5	3.97	1.17
14. Contribution to community and sustainability initiatives in a responsible manner from enterprises, visitors, and the public	4.7	5.7	21.9	26.3	41.4	67.7	3.94	1.13
24. Safeguarding cultural identify of local community	4.1	7.6	19.6	33.7	35.1	68.7	3.88	1.10

23. Cultural/heritages sites accessible to physically disabled tourists	5.8	7.1	21.0	27.8	38.3	66.1	3.86	1.18
19. Accurate interpretative material that informs visitors of the significance of the cultural and natural aspects of the sites they visit	5.4	6.1	22.7	32.9	32.9	65.8	3.82	1.12
4. Reduction of energy consumption and improvement of efficiency in its use	7.1	7.1	20.7	27.6	37.4	65.0	3.81	1.22
7. Reduction of greenhouse gas emissions	8.5	7.8	18.6	25.1	40.0	65.1	3.80	1.28
30. A system to monitor and respond to socio-economic, cultural and environmental issues and impacts arising from tourism	5.1	8.1	21.4	34.9	30.5	65.4	3.78	1.12
31. Public participation in sustainable destination planning and management	5.1	9.2	23.7	30.8	31.2	62.0	3.74	1.14
29. A risk reduction, crisis management and emergency response plan	7.2	8.6	24.3	23.3	36.6	59.9	3.74	1.24
9. Economic opportunities from tourism development.	5.7	9.1	22.5	34.2	28.5	62.8	3.71	1.14
16. A system to monitor, prevent, publicly report, and respond to crime, safety, and health hazards that addresses the needs of both visitors and residents	4.5	12.7	26.0	25.3	31.5	56.8	3.67	1.17
32. The destination management strategy/plan clearly visible and available online	7.9	10.6	25.7	26.7	29.1	55.8	3.59	1.23
27. Local leaders' support for tourism development	8.9	8.6	26.4	32.5	23.6	56.2	3.53	1.20
10. High-paying jobs from tourism development	6.1	10.4	29.3	33.7	20.5	54.2	3.52	1.11
28. Quality of public-private partnership in tourism	7.5	10.5	31.6	31.0	19.4	50.3	3.44	1.14
15. Career opportunities and training in tourism	7.2	9.9	35.8	32.4	14.7	47.1	3.38	1.08
12. Marketing and promotion of tourism assets to visitors	10.4	15.4	33.2	21.8	19.1	40.9	3.24	1.23
13. More investment in tourism development	11.4	16.8	33.2	20.8	17.8	38.6	3.17	1.23
26. Existence of a regional collaboration and marketing organization	12.8	18.0	31.5	23.2	14.5	37.7	3.09	1.23
25. Evidence of links and engagement with other bodies	13.4	17.7	39.0	20.1	9.8	29.9	2.95	1.14
22. Opportunities for visitors to reflect on religious or other spiritual values	20.9	20.2	33.8	15.7	9.4	25.1	2.72	1.23

Note. Items 1-8: environmental; items 9-16: socio-economical; items 17-24: cultural; items 25-32: institutional

bodies" (item 25; 29.5%, M = 2.95). These results suggest that while environmental sustainability remains a priority, certain institutional and cultural indicators are perceived as less essential for sustainable tourism in the region, or that respondents in general associate “sustainability” more with “environmental sustainability”.

Overall, respondents rated environmental indicators the highest (M = 4.18), followed by socio-economic (M = 4.04) and cultural indicators (M = 4.01). In contrast, institutional indicators received the lowest average importance rating (M = 3.78), suggesting that while governance and policy-related factors are recognized, they are not as immediately prioritized as environmental and socio-economic aspects of tourism sustainability.

3.3.2. Performance

After asking respondents to rank those various indicators in terms of their importance for measuring sustainable tourism, they were asked how well they thought the region performed on the indicators. As discussed further below, when an indicator is considered important but its performance is assessed to be low or poor, this represents an opportunity where the community may seek to change the underlying conditions that are causing the perceived low performance.

Table 9 presents the respondents' assessment of the performance of 32 sustainable tourism indicators in the Upper Valley Region. The highest performance rating was given to "environmental quality (water, air, resource quality)" (Item 3), with 69.0% of respondents rating it as "mildly agree" or "strongly agree" regarding its performance (M = 3.84). This was followed by "protection of the natural environment" (Item 1), with a satisfaction share of 66.0% and a mean score of 3.78. "Rural authenticity" (Item 2) ranked third, with 59.2% of respondents expressing satisfaction and a mean score of 3.65. The top three indicators with the highest perceived performance all belong to the environmental category.

Interestingly, the highest-rated institutional indicator was "local leaders' support for tourism development" (Item 27), with a mean score of 3.28, though only 43.0% of respondents agreed or strongly agreed with its performance. Among the cultural indicators, "celebration and protection of intangible cultural heritage" (Item 18) received a mean score of 3.29, with 44.0% of respondents rating it positively.

Table 9. Perceptions of Tourism Sustainability Indicators: Performance

Items	Strongly disagree (SD) (%)	Mildly disagree (MD) (%)	Neutral (N) (%)	Mildly agree (MA) (%)	Strongly agree (SA) (%)	MA+ SA	Mean	Std. Dev
3. Environmental quality (water, air, resource quality, etc.)	3.9	4.9	22.2	40.9	28.1	69	3.84	1.02
1. Protection of the natural environment	3.9	5.3	24.8	40.8	25.2	66	3.78	1.01
2. Rural authenticity	4.1	5.1	31.6	40.3	18.9	59.2	3.65	0.98
6. Management of waste	3.6	19.3	32.8	23.4	20.8	44.3	3.39	1.12
4. Reduction of energy consumption and improvement of efficiency in its use	4.7	14.1	40.3	24.6	16.2	40.8	3.34	1.06
18. Celebration and protection of intangible cultural heritage, including local traditions, arts, music, language, food and other aspects of local identity and distinctiveness	7.4	14.9	33.7	29.7	14.3	44	3.29	1.11
27. Local leaders' support for tourism development	8.7	11.6	36.6	29.1	14	43	3.28	1.12
23. Cultural/heritages sites accessible to physically disabled tourists	7.9	15.9	39	18.3	18.9	37.2	3.24	1.17
8. Management of overcrowding	8.3	16.7	34.4	24.5	16.1	40.6	3.23	1.16
9. Economic opportunities from tourism development.	6.2	15.2	38.2	30.3	10.1	40.4	3.23	1.03
16. A system to monitor, prevent, publicly report, and respond to crime, safety, and health hazards that addresses the needs of both visitors and residents	10.6	16.8	31.1	24.2	17.4	41.6	3.21	1.22
24. Safeguarding cultural identity of local community	9.4	14	36.8	25.7	14	39.8	3.21	1.14
5. Control of negative impacts through long-term planning	9.3	20.3	30.8	23.1	16.5	39.6	3.17	1.2
17. A policy and system to evaluate, rehabilitate, and conserve cultural assets, including built heritage and cultural landscapes	9.2	19.6	33.3	21.6	16.3	37.9	3.16	1.19
19. Accurate interpretative material that informs visitors of the significance of the cultural and natural aspects of the sites they visit	6.8	18.8	38.6	25	10.8	35.8	3.14	1.06
26. Existence of a regional collaboration and marketing organization	10.9	16.4	35.8	23.6	13.3	37	3.12	1.17
20. Guidelines for visitor behavior at sensitive sites and cultural events being made available to visitors	7.2	26.3	30.5	19.8	16.2	35.9	3.11	1.18
12. Marketing and promotion of tourism assets to visitors	7.1	19.2	39.6	24.7	9.3	34.1	3.1	1.05
28. Quality of public-private partnership in tourism	9.5	15.8	43	18.4	13.3	31.6	3.1	1.12
31. Public participation in sustainable destination planning and management	8.9	25.4	27.8	23.7	14.2	37.9	3.09	1.19
13. More investment in tourism development	9.3	16.3	43.6	18.6	12.2	30.8	3.08	1.1
25. Evidence of links and engagement with other bodies	7.6	16.8	43.5	23.7	8.4	32.1	3.08	1.02
29. A risk reduction, crisis management and emergency response plan	12.8	17.6	31.8	24.3	13.5	37.8	3.08	1.22
14. Contribution to community and sustainability initiatives in a responsible manner from enterprises, visitors, and the public	9	24.3	29.4	25.4	11.9	37.3	3.07	1.16
21. Optimize visitor flow and minimize adverse impacts in cultural sites	9.9	19.9	35.4	23	11.8	34.8	3.07	1.14
7. Reduction of greenhouse gas emissions	9.7	24.4	34.1	17.6	14.2	31.8	3.02	1.18
11. Improvement of the well-being of rural communities from tourism development	11	23.2	33.7	18.8	13.3	32	3	1.18
22. Opportunities for visitors to reflect on religious or other spiritual values	12.9	18	38.1	20.1	10.8	30.9	2.98	1.16
32. The destination management strategy/plan clearly visible and available online	16.9	20.4	30.3	15.5	16.9	32.4	2.95	1.31
15. Career opportunities and training in tourism	11.6	24.5	34.2	21.3	8.4	29.7	2.9	1.12
30. A system to monitor and respond to socio-economic, cultural and environmental issues and impacts arising from tourism	12.8	25	32.4	19.6	10.1	29.7	2.89	1.17
10. High-paying jobs from tourism development	13.7	26.8	34.5	17.9	7.1	25	2.78	1.11

Note. Items 1-8: environmental; items 9-16: socio-economical; items 17-24: cultural; items 25-32: institutional

On the other end of the spectrum, "High-paying jobs from tourism development" (Item 10) was rated the lowest (M = 2.78, 25%), followed closely by "A system to monitor and respond to socio-economic, cultural and environmental issues and impacts arising from tourism" (Item 30; M = 2.89, 29.7%). Overall, institutional and cultural indicators received lower performance ratings than environmental and socio-economic dimensions.

As a next step, Figure 12 presents a gap analysis comparing the relative importance and perceived performance of each indicator. Importantly, this analysis does not use raw scores on the axes, but instead plots the difference between each indicator's score and the average (grand mean) of all importance and performance means. The crosshairs represent the overall meaning of both scales. This method allows for visualization of which indicators are performing above or below average relative to their importance. Also known as a Gap Analysis, this shows where efforts for improvement in the community would have the highest impact, the "concentrate here" quadrant (high importance but low performance), and where residents are satisfied in terms of how the important indicators are performing (i.e., "keep up the good work"). Other quadrants are areas of "possible overkill" in that performance is high, but importance is not, and areas of "low priority" in that performance is low, but importance is also low (Figure 12).

The analysis shows that environmental quality (Item 3), protection of the natural environment (Item 1), and rural authenticity (Item 2) are all located in the "keep up the good work" quadrant—residents rated them as highly important, and they also showed relatively high performance. Other indicators in this category include management of waste (Item 6), celebration and protection of intangible cultural heritage (Item 18), management of overcrowding (Item 18), and safeguarding cultural identity of local community (Item 24). In contrast, several indicators fall in the "concentrate here" quadrant. These include control of negative impacts

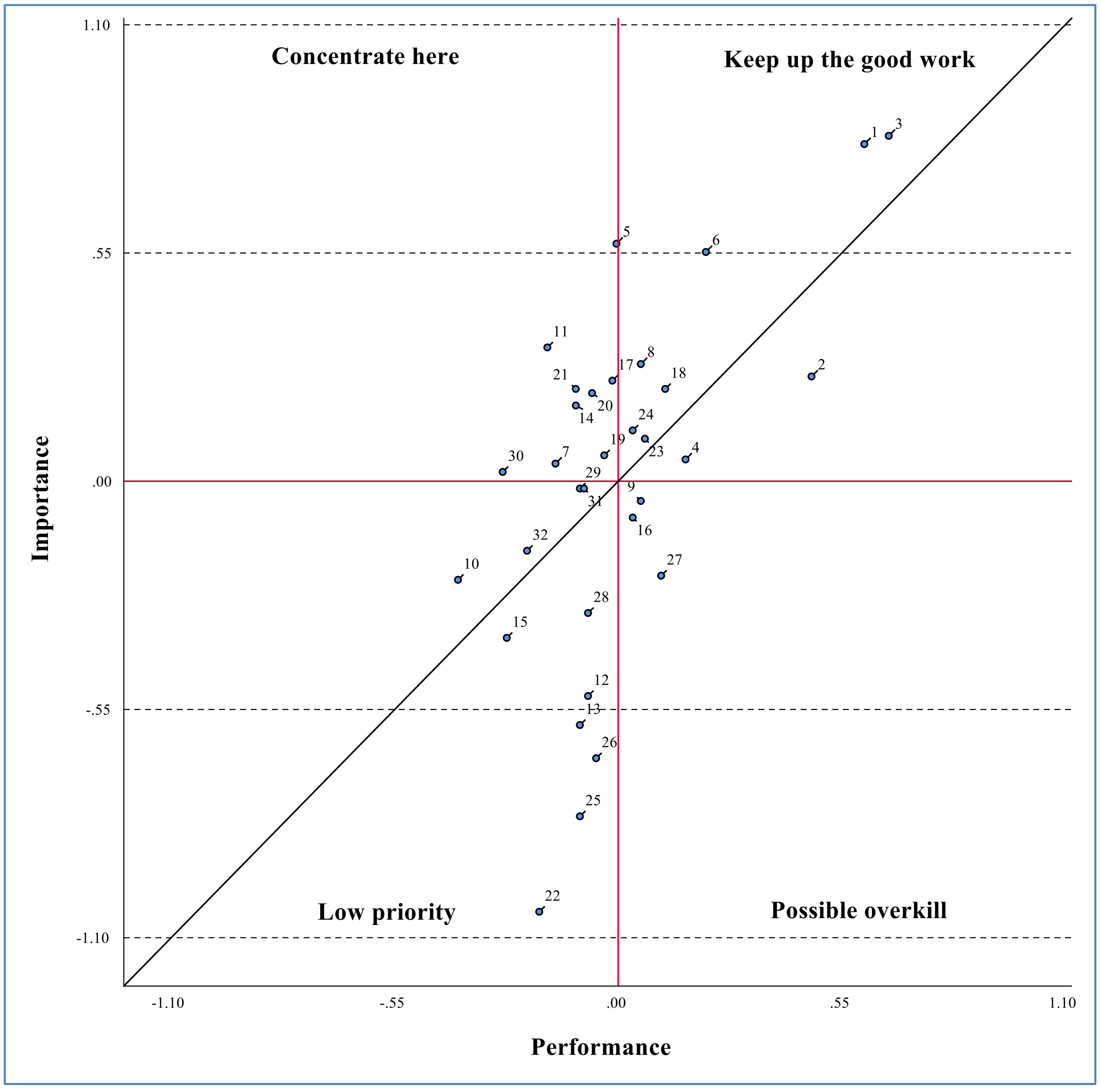

Figure 12. Performance-Importance (Gap) Analysis

through long-term planning (Item 5), improvement of the well-being of rural communities from tourism development (Item 11), guidelines for visitor behavior at sensitive sites and cultural events (Item 20), and contribution to community and sustainability initiatives (Item 14). These areas are considered highly important by residents but were assessed as underperforming, suggesting the most urgent opportunities for improvement. Other indicators such as opportunities for visitors to reflect on religious or other spiritual values (Item 22), and evidence of links and engagement with other bodies (Item 25), appeared in the "possible overkill" quadrant, where performance is relatively strong, but the importance is low. These areas may warrant less emphasis in future strategic efforts. The "low priority" quadrant includes indicators such as high-paying jobs from tourism development (Item 10), more investment in tourism development (Item 13), and career opportunities and training in tourism (Item 15), which received below-average ratings on both importance and performance.

Figure 12 offers a strategic lens through which to interpret the alignment (or misalignment) between what the community values and how well those values are being met. Prioritizing resources toward the "concentrate here" indicators is likely to have the greatest positive impact on sustainable tourism development in the Upper Valley region.

3.4 Attitudes Toward Recreation and Tourism

Table 10 presents respondents' attitudes toward recreation and tourism development in the Upper Valley Region. Respondents were asked to indicate their level of agreement with a series of statements. The highest levels of agreement were seen for Item 9, "long-term planning and managed growth are important to control any negative impacts of tourism" (93.4%, M = 4.57), showing widespread recognition of the importance of proactive planning. This was followed by Item 2, "tourism development will provide more economic opportunities for the area" (77.1%, M = 3.85), and Item 8, which acknowledged that increased tourism may lead to crowding of outdoor and cultural sites (62.1%, M = 3.63). Other statements that received relatively strong agreement included Item 7, "the area should invest in tourism development" (55.9%, M = 3.36), and Item 6, "tourism will improve the wellbeing of communities in the area" (52.0%, M = 3.31).

In contrast, items reflecting concern or opposition to tourism development received less agreement. For example, only 33.9% agreed with Item 4, "I support taxes for tourism development in the area" (M = 2.81), and similarly low levels of agreement were seen for Item 12, which suggested tourism may cause unacceptable levels of traffic, crime, and pollution (33.0%, M = 2.84), and Item 11, which called for discouraging more intensive development (31.7%, M = 2.91). These results suggest that while residents generally support tourism and see its potential benefits, they are less supportive of tax-based funding and express limited concern about its negative impacts.

Table 10. Attitudes Toward Recreation/Tourism Development

Items	Strongly disagree (SD) (%)	Mildly disagree (MD) (%)	Neutral (N) (%)	Mildly agree (MA) (%)	Strongly agree (SA) (%)	MA+ SA	Mean (M)	Std. Dev
9. Long-term planning and managed growth are important to control any negative impacts of tourism	0.4	0.9	5.3	27.8	65.6	93.4	4.57	0.68
2. Tourism development will provide more economic opportunities for the area	4.4	7.0	11.5	52.9	24.2	77.1	3.85	1.01
8. An increase in tourism will lead to crowding of outdoor recreation, historic, and cultural sites/attractions	3.1	14.5	20.3	40.5	21.6	62.1	3.63	1.07
10. The area should do more to promote its tourism assets to visitors	7.5	12.3	27.3	31.7	21.1	52.9	3.47	1.17
7. The area should invest in tourism development	10.6	11.0	22.5	43.6	12.3	55.9	3.36	1.16
6. Tourism will improve the wellbeing of communities in the area	6.6	15.4	26.0	44.5	7.5	52.0	3.31	1.04
1. An increase in tourism will increase the cost of living in the Upper Valley Region	7.9	19.4	22.9	35.2	14.5	49.8	3.29	1.17
3. Tourism development will only produce low-paying service jobs	8.4	24.7	23.8	34.8	8.4	43.2	3.10	1.12
5. Tourism development will help to protect natural/heritage resources in the area	11.5	24.7	26.9	33.5	3.5	37.0	2.93	1.09
11. The area should discourage more intensive development of facilities, services, and attractions for tourists	11.9	29.1	27.3	19.8	11.9	31.7	2.91	1.20
12. An increase in tourism will lead to unacceptable amounts of traffic, crime, and pollution	17.2	25.6	24.2	22.0	11.0	33.0	2.84	1.26
4. I support taxes for tourism development in the area	22.5	15.9	27.8	26.0	7.9	33.9	2.81	1.27

3.5 Perceptions of Relative Competitiveness

Respondents were asked if they had visited other rural destinations that were similar to the Upper Valley Region (Figure 13), and if so, how they would compare the region to those comparable other areas. Figure 13 shows that 73.78% of respondents had visited similar destinations elsewhere, while 26.22% did not.

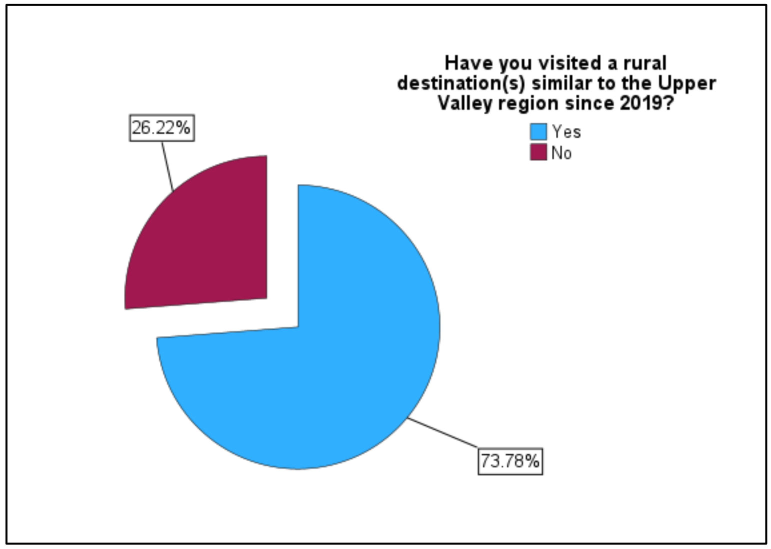

Figure 13. Visitation of Similar Destinations

Table 11 presents respondents' perceptions of the competitiveness of the Upper Valley Region in comparison to other similar destinations. Respondents were asked to rate how various attributes of the region compared, from much worse to much better. The highest ratings were given to Item 15, "level of crowding," where 47.1% of respondents indicated the region was somewhat or much better than others (M = 3.42). This was followed by Item 7, "security and safety" (30.7%, M = 3.33), and Item 3, "rural tranquility and authenticity" (36.6%, M = 3.31), suggesting that respondents viewed the region's peaceful and safe environment as relatively strong competitive assets. Item 13, "outdoor recreation opportunities," also received favorable responses, with 30.1% indicating it as better or much better (M = 3.18).

Table 11. Perceptions of Competitiveness

Items	Much Worse (%)	Somewhat Worse (%)	About the Same (%)	Somewhat Better (%)	Much Better (%)	Somewhat Better+Much Better	Mean (M)	Std. Dev
15. Level of crowding	0.7	14.4	37.9	35.9	11.1	47.1	3.42	0.89
7. Security and safety	2.0	3.3	64.1	20.9	9.8	30.7	3.33	0.78
3. Rural tranquility and authenticity	1.3	11.1	51.0	28.8	7.8	36.6	3.31	0.82
13. Outdoor recreation opportunities	2.0	13.1	54.9	24.8	5.2	30.1	3.18	0.80
9. Resource conservation	1.3	17.0	55.6	19.6	6.5	26.1	3.13	0.82
4. Hospitability and friendliness of local residents	3.9	15.7	55.6	16.3	8.5	24.8	3.10	0.90
1. Natural attraction	2.6	17.6	53.6	20.3	5.9	26.1	3.09	0.85
5. Diversity and uniqueness of local products	4.6	19.6	46.4	22.2	7.2	29.4	3.08	0.94
6. Accessibility	3.3	9.8	70.6	15.0	1.3	16.3	3.01	0.66
10. Festivals and events	3.9	22.9	49.0	19.6	4.6	24.2	2.98	0.88
8. Infrastructure	4.6	22.2	51.0	16.3	5.9	22.2	2.97	0.90
11. Local food/eatery	9.8	25.5	38.6	20.3	5.9	26.1	2.87	1.04
2. Heritage and cultural assets	3.9	28.1	51.0	13.7	3.3	17.0	2.84	0.83
16. Shopping	7.8	31.4	34.6	21.6	4.6	26.1	2.84	1.00
18. Overall competitiveness	2.6	27.5	56.2	11.8	2.0	13.7	2.83	0.74
12. Prices	7.8	22.9	52.3	14.4	2.6	17.0	2.81	0.87
14. Entertainment and night life	13.1	27.5	37.3	19.6	2.6	22.2	2.71	1.01
17. Lodging	11.8	25.5	50.3	9.8	2.6	12.4	2.66	0.90

In contrast, the lowest ratings were given to "lodging" (Item 17), where only 12.4% rated the region as somewhat or much better (M = 2.66), followed by "entertainment and night life" (Item 14, 22.2%, M = 2.71), and "prices" (Item 12, 17.0%, M = 2.81). These attributes appear to be areas where respondents saw the region as less competitive compared to other destinations. The average mean across all 18 items was 3.05, suggesting that while residents perceive the region as having some competitive strengths, there remain notable opportunities for improvement in areas such as tourism infrastructure, pricing, and visitor amenities.

Community residents were asked to list up to three rural destinations they have visited since 2019 that they felt were like the Upper Valley Region. Out of 403 total responses, the Adirondacks (NY) was the most frequently mentioned location (5 or more mentions) (Table 12).

Table 12. Rural destinations similar to the Upper Valley region

Name	Total	Percentage (%)
Adirondacks (NY)	11	16.4
Berkshires (MA)	9	13.4
White Mountains (NH)	8	11.9
Acadia National Park/Bar Harbor(ME)	7	10.4
Maine	7	10.4
Coastal Maine	5	7.5
Finger Lakes (NY)	5	7.5
Littleton (NH)	5	7.5
North Conway (NH)	5	7.5
Northampton/Pioneer Valley (MA)	5	7.5
Total	67	100.0

3.6 Perceived Strengths for Developing Tourism and Recreation

Survey respondents were asked to identify what they consider the current strengths for tourism development in the Upper Valley Region. The resulting word cloud highlights the terms most frequently mentioned by participants. Leading responses included "natural," "beauty," "outdoor," "recreation," and "opportunities," indicating that residents

Figure 14. Respondent Identified Strengths for Tourism Development

view the region's scenic landscapes and recreational offerings as key assets. Additional frequent terms such as "resources," "activities," "trails," "access," and "local" suggest strong support for nature-based tourism, easily accessible outdoor infrastructure, and the role of community-level involvement. These responses point to a shared appreciation of the Upper Valley's environmental and recreational appeal (Figure 14).

Table 13 summarizes survey responses identifying key strengths that support recreation and tourism development in the area. Consistent with the word cloud analysis shown in Figure 14, natural resources were identified as the region's greatest strength (19.4%), followed by business/economic/community development (13.1%), which was tied with recreational activities (13.1%). In contrast, infrastructure was considered the region's weakest strength, with only 1.9% identifying it as such.

Table 13. Current strengths for developing recreation and tourism

Name	Total	Percentage (%)
Natural Resources	40	19.4
Business/Economic/Community Development	27	13.1
Recreational Activities	27	13.1
Location/Proximity to Tourists	23	11.2
Many Attractions/Events/Culture Activities	23	11.2
None	23	11.2
N/A	22	10.7
People/Community Support	9	4.4
Rural Environment (Attracts Tourists)	8	3.9
Infrastructure	4	1.9
Total	206	100.0

3.7 Perceived Weaknesses for Developing Tourism and Recreation

Respondents were also asked to identify what they see as weaknesses or barriers to tourism development in the Upper Valley Region. The word "lack" emerged as the most dominant response, followed closely by "housing," "public," "local," and "parking." These frequently mentioned terms reflect a perceived shortage of essential infrastructure and community services. Other responses such as "access," "transportation," and "development" further point to concerns about planning, mobility, and readiness to support increased visitation. Collectively, these insights highlight the structural challenges that may inhibit tourism growth unless addressed (Figure 15).

Figure 15. Respondent-Identified Weaknesses for Tourism Development

Table 14 summarizes participants' responses by category. Of the 237 total responses, 41 (17.3%) relate to a lack of infrastructure. As shown in Figure 15, the word "lack" is the most frequently mentioned term, which aligns with five categories in Table 14 that specifically reference the word "lack": Lack of Infrastructure (Transportation), Lack of Affordable Housing, Lack of Hotels/Hospitality/Restaurants, Lack of Recreational Activities, and Lack of Events.

Table 14. Current weaknesses for developing recreation and tourism

Name	Total	Percentage (%)
Lack of Infrastructure (Transportation)	41	17.3
Organizational and Community Leadership	25	10.6
Lack of Affordable Housing	25	10.6
Overtourism Concerns	24	10.1
Lack of Hotels/Hospitality/Restaurants	23	9.7
None	19	8.0
Lack of Recreational Activities	18	7.6
Marketing	15	6.3
High Costs of Tourism	13	5.5
Workforce Needs	13	5.5
Overdevelopment Concerns	8	3.38
Loss of Local Character	5	2.1
Perception of Area/Lack of Diversity	5	2.1
Safety Concerns	2	0.8
Lack of Events	1	0.4
Total	237	100.0

3.8 Suggestions for Improving the Region's Competitiveness

To identify strategies for enhancing the region's competitiveness as a tourism destination, survey respondents were asked to provide specific suggestions. Words such as "local," "trails," "towns," and "restaurants" appeared prominently, indicating an interest in community-based

Figure 16. Respondent Identified Methods to Improve Competitiveness

improvements. Other commonly cited words included "housing," "promote," "develop," "marketing," "affordable," and "accessible." The emphasis on both development and promotion reflects residents' desire for balanced strategies that improve infrastructure and raise awareness of what the region offers. Ideas around "events," "biking," and "lodging" point toward diversifying tourism experiences and accommodation (Figure 16).

Suggestions for improving the region's competitiveness is also summarized by category (Table 15). Most respondents suggested that the region needs to improve marketing (17.3%), increase hospitality (hotels/restaurants) (12.4%), improve infrastructure (11.5%), and increase activities for visitors (8.8%). Other strategies include more collaboration between organizations and better planning (8.4%), more events (7.5%), improving housing affordability (6.6%), and do not want to increase tourism (5.8%), among others.

Table 15. Strategies for enhancing the region's competitiveness

Name	Total	Percentage (%)
Improve Marketing	39	17.3
Increase Hospitality (Hotels/Restaurants)	28	12.4
Improve Infrastructure	26	11.5
Increase Activities for Visitors	20	8.8
More Collaboration Between Organizations and Better Planning	19	8.4
More Events	17	7.5
Nothing	17	7.5
Improve Housing Affordability	15	6.6
Don't Want to Increase Tourism	13	5.8
Protect the Environment	9	4.0
Embrace Tourism	7	3.1
Increase Funding/Funding Sources for Tourism	7	3.1
Unsure	5	2.2
Other	4	1.8
Total	237	100.0

3.9 Key Characteristics, Attractions, and Events that Represent the Region

Respondents were asked to describe the Upper Valley using images or characteristics that come to mind when they think of it as a tourism destination. The word cloud in Figure 17 shows that "natural," "mountains," "lakes," "beauty," and "river" were among the most commonly mentioned, emphasizing the scenic and environmental qualities of the region. Terms like "hiking," "outdoor," "trails," "rural," and "Dartmouth" also appeared frequently, reflecting strong associations with both recreational opportunities and the cultural-educational significance of the area. These findings suggest that nature, tranquility, and identity-defining institutions shape how the region is perceived (Figure 17).

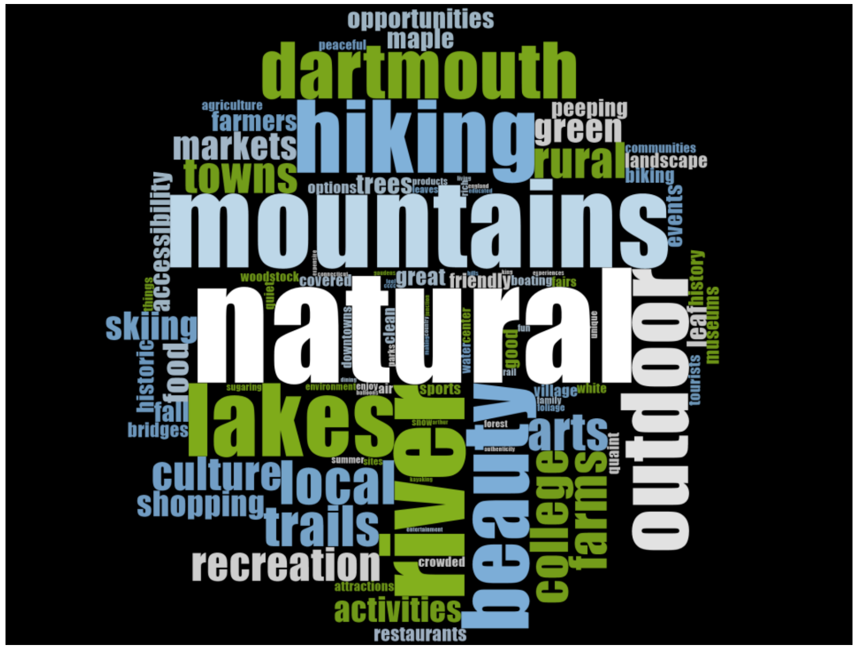

Figure 17. Respondent Identified Images or Characteristics

Table 16 presents key images or characteristics that represent the region from the perspective of residents. The most frequently mentioned category is "Towns/Destinations/Amenities/Events," accounting for 196 responses or 34.1% of the total. This is followed by "Scenic Beauty" (11.7%), "Water/Water Recreation" and "Nature" (both at 9.9%). Other notable categories include "Activities/Outdoor Recreation" (8.7%), "Rural/Farmland" (7.0%), and "Overcrowded/Expensive" (6.3%). Less frequently mentioned were "Trails/Hiking," "Peacefulness," "Other," and "Accessibility," each comprising between 5.0% and 0.9% of responses.

Table 16. Key images for the Upper Valley region as a tourism destination

Name	Total	Percentage (%)
Towns/Destinations/Amenities/Events	196	34.1
Scenic Beauty	67	11.7
Water/Water Recreation	57	9.9
Nature	57	9.9
Activities/Outdoor Recreation	50	8.7
Rural/Farmland	40	7.0
Overcrowded/Expensive	36	6.3
Trails/Hiking	29	5.0
Peacefulness	20	3.5
Other	12	2.1
Nothing	6	1.0
Accessibility	5	0.9
Total	575	100.0

Survey participants were invited to list up to three specific distinctive or unique attractions or events that they believe represent the Upper Valley Region in terms of tourism and recreation (Figure 18). In rough order of frequency, the most cited responses included "farmers" and "markets," followed by "festival," "museum," and "Dartmouth." Other common entries included "lake," "balloon," "Woodstock," and "art." These results indicate a strong connection between local agriculture, cultural events, and prominent institutions or towns as key components of the tourism experience. Events such as markets and festivals appear to serve as anchors for both residents and visitors in defining the region's character.

Figure 18. Distinctive Attractions or Events Representing

3.10 Words Used to Describe the Upper Valley Region

When asked to list the first three words or phrases they would use to describe the Upper Valley Region to someone who has never been there, respondents provided a wide range of descriptors (Figure 19).

The most common terms, as illustrated in the word cloud, were "beautiful," "natural," and "rural." Other frequently used words included "peaceful," "quiet," "friendly," "historic," and "cultural." These descriptors reflect the region's scenic beauty, emotional resonance, and tranquil character. Collectively, they suggest that residents associate the Upper Valley with a high quality of life, visual appeal, and a calm, welcoming atmosphere.

Figure 19. Respondent Identified Phrases of the Upper Valley Region

Table 17 presents categorized words/phrases that could best describe the region. Most mentioned "Festivals/Fairs/Events" (18.9%), closely followed by "Agritourism" (18.6%), "Dartmouth College" (10.1%), "Lakes/Rivers" (8.9%) and "Balloon Festivals" (8.6%). Other notable mentions include "Towns" (6.2%), "Attractions," "Hiking," and "Sightseeing" (each at 5.9%), with "Montshire Museum" and "Arts/Culture/Education" accounting for 5.6% and 5.3%, respectively. The information reflects a diverse range of interests, with a strong emphasis on community events, learning opportunities, and natural or rural experiences.

Table 17. Words that can best represent the Upper Valley region

Name	Total	Percentage (%)
Festivals/Fairs/Events	64	18.9
Agritourism	63	18.6
Dartmouth College	34	10.1
Lakes/Rivers	30	8.9
Balloon Festivals	29	8.6
Towns	21	6.2
Attractions	20	5.9
Hiking	20	5.9
Sightseeing	20	5.9
Montshire Museum	19	5.6
Arts/Culture/Education	18	5.3
Total	338	100.0

3.11 How Residents Refer to Their Place of Residence

In a separate question, respondents were asked how they typically refer to their place of residence when speaking with people outside of the region. The most frequently used terms included "New Hampshire," "Vermont," with additional mentions of "Dartmouth," "college," "Hanover," and "Lebanon." The word cloud indicates that respondents commonly describe their location using broader geographic and institutional references. This suggests that well-known state identifiers and prominent landmarks such as Dartmouth College play a central role in how residents situate themselves when talking to outsiders (Figure 20).

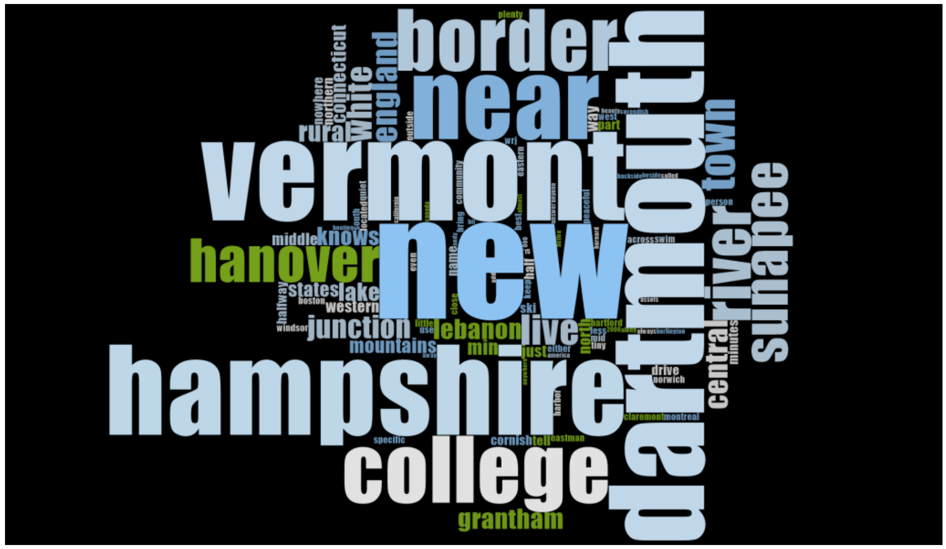

Figure 20. Respondent Reference of Where They Live

Table 18 summarizes responses to the question about how they identify their location to outsiders who are not familiar with the region. The largest group (13.0%) described their location as the "Upper Valley," followed closely by "Near Dartmouth" (12.4%) and "NH" (11.4%). "Vermont" was also a popular identification at 10.9%, with "NH/VT Border" and "Sunapee Region" comprising 7.8% and 6.7%, respectively. Other responses, such as "Hanover" (5.2%), "Country/Rural" and "Grantham" (both 3.6%), and "New England" and "White River Junction" (both 3.1%) reflect a mix of broader regional and more specific geographic identifiers. A smaller portion of respondents used highly specific or unique descriptors like “Best Town in the US,” or identified with small towns like "Enfield" or "Charlestown," each making up 0.5% of responses. The variety of responses illustrates a diverse range of local and regional attachments among participants.

Table 18. Self-description of respondents' places of residence

Name	Total	Percentage (%)
Upper Valley	25	13.0
Near Dartmouth	24	12.4
NH	22	11.4
Vermont	21	10.9
NH/VT Border	15	7.8
Sunapee Region	13	6.7
Other	12	6.2
Hanover	10	5.2
Country/Rural	7	3.6
Grantham	7	3.6
New England	6	3.1
White River Junction	6	3.1
Best Town in the US	5	2.6
Central VT	4	2.1
Lebanon	3	1.6
SW NH	2	1.0
Central NH	2	1.0
Cornish	2	1.0
Merrimack County	1	0.5
SE VT	1	0.5
Barnard VT	1	0.5
Charlestown	1	0.5
Norwich	1	0.5
CT River Valley	1	0.5
Enfield	1	0.5
Total	338	100.0

3.12 Additional comments about tourism

The final question of the survey asked respondents to share any additional comments about tourism in the region. A total of 81 responses were received and categorized into 12 themes, (Table 19). The most frequently mentioned concern was "overtourism and overdevelopment," accounting for 33.3% of responses. This was followed by "economic opportunities from tourism (16.0%), while both "regional and community collaboration" and "environmental protection" were each noted in 11.1% of the responses. Other notable themes included the "need for affordable housing" (4.9%), the desire for "more activities and attractions for tourists" (4.9%), and expressions of appreciation for the focus of the study itself (e.g., "appreciate studying this topic," 4.9%). The remaining responses were spread across various other categories, each representing a smaller proportion of the overall feedback. These insights provide a nuanced understanding of the community's perspectives on tourism, highlighting both its potential benefits and key areas for improvement. The feedback emphasizes the importance of balancing tourism development with community needs, environmental sustainability, and long-term regional planning.

Table 19. Summary of comments by category

Name	Total	Percentage (%)
Overtourism and Overdevelopment Concerns	27	33.3
Economic Opportunities from Tourism	13	16.0
Regional and Community Collaboration is Needed	9	11.1
Environment Protection	9	11.1
Affordable Housing is Needed	4	4.9
More Activities/Attractions for Tourists	4	4.9
Appreciate Studying this Topic	4	4.9
Increase Diversity	3	3.7
Improved Transportation Infrastructure	3	3.7
Support the Workforce	3	3.7
Invest in Education	1	1.2
Rural Community	1	1.2
Total	81	100.0

Note. Those of respondents who provided no comments were excluded.

4. Conclusion

The information generated in this study and presented in this report can help destination management organizations, local leadership, and other local businesses and non-profits better understand local residents' perceptions, priorities, and engagement in tourism-related and recreational activities in the Upper Valley Region. Knowing residents' perceptions and opinions of key tourism sustainability indicators related to environmental, socio-economic, cultural and institutional factors can help ensure that future developments are consistent with local values and preferences. For residents in the Upper Valley area, environmental quality (in terms of water, air and other resources), rural authenticity of the region, and protection of this natural environment were all important and ranked highly with mean scores above 4.0 out of 5. Planning pertaining to risk reduction and mitigation, waste management and emergency response was also considered important, as was safeguarding the cultural identity of the local community. Comparing and contrasting this information with the data collected in the corresponding visitor surveys can be valuable for identifying areas of conflict and synergy, as well as areas where future investments can help make the region more attractive to all types of tourists and leisure visitors, whether local or visiting from afar.

Limitations of this study should be noted. For instance, certain activities such as snowmobiling and horseback riding did not emerge in this data as being very popular in the region. This is a reflection of the particular sample reached, but may not fully reflect the actual population's participation. With this in mind, it should not be assumed that such activities are not available in the region or are not potentially economically impactful, but rather that in this limited sample there were other activities that had broader participation rates. Activities that did not show strong participation rates in this study but which *are* available in the region should be acknowledged as potential activities for local stakeholders to expand tourism promotion, education, and awareness. Results pertaining to key sites visited and activity choice could also correlate with gender, age, and other demographic variables. In this sample, respondents skewed female (63.16%) and nearly a third were over the age of 65 (32.63%). Future research could continue to investigate activity, amenity, and location preferences by demographic groups or traveler types (e.g., solo travelers, families with young children, retirees).

Together with the companion report on visitors' travel behaviors and perceptions of tourism sustainability in the Upper Valley Region, this report can serve as a potential blueprint for developing the local tourism and recreation economy sectors. Ensuring that such developments benefit the community more broadly requires extensive community discussion, deliberation, and planning.

5. References

Deng, J., D. Arbogast, Y. Zhuang and S.J. Goetz (2024), "Visitors' Travel Behavior and Perceptions of the Monongahela National Forest Region," unpubl. Report available at: https://nercrd.psu.edu/wp-content/uploads/2024/12/USDA_NIFA-WV-Visitor-Survey-Report_12-20-2024.pdf