

# Lakes Region Tourism Profile



**Lakes Region Planning Commission**

**January 2002**



Lakes Region Planning Commission

# **Lakes Region Tourism Profile**

Prepared by the

## **Lakes Region Planning Commission**

103 Main Street, Suite #3  
Meredith, New Hampshire 03253

This report was prepared under contract with  
New Hampshire Community Development Finance Authority  
and  
Belknap County Economic Development Council

Opinions in this report are not necessarily  
those of the grantor agencies

## THE LAKES REGION PLANNING COMMISSION



### LRPC COMMISSIONERS 2001-2002

<u>ALTON</u> Alan Sherwood James Washburn Thomas Hoopes, Alt.	<u>BRIDGEWATER</u> Vacant	<u>EFFINGHAM</u> William Stewart Janet Normandeau	<u>HEBRON</u> Vacant	<u>MOULTONBOROUGH</u> Terence Jatko Jeremiah V. Donovan	<u>SANDWICH</u> Toby Eaton
<u>ANDOVER</u> Eric A. Johnson Kevin S. Sleeper	<u>BRISTOL</u> David Sullivan Michael Soule	<u>FRANKLIN</u> Thomas Bugely Norma Schofield	<u>HILL</u> Vacant	<u>NEW HAMPTON</u> Dr. George Luciano Paul Tierney	<u>TAMWORTH</u> Herb Cooper Robert Freeto
<u>ASHLAND</u> Christopher Johnstone	<u>BROOKFIELD</u> Anne Martin	<u>FREEDOM</u> Robert Houle Ralph Kazanjian	<u>HOLDERNESS</u> Robert Snelling Adam Tatem	<u>NORTHFIELD</u> Francis LaBranche David Krause Douglas Read, Alt.	<u>TILTON</u> Katherine Dawson Robert Brown
<u>BARNSTEAD</u> William Evans	<u>CENTER HARBOR</u> Harold Tate Harold Bernt	<u>GILFORD</u> Richard Waitt	<u>LACONIA</u> Arthur Abelmann Peter Brunette David Stamps	<u>OSSIPEE</u> Dr. Patricia Jones Mark McConkey	<u>WOLFEBORO</u> Roger Murray, III William Wiebe
<u>BELMONT</u> Donald Pugh William Brunkhardt	<u>DANBURY</u> Phyllis J. Taylor	<u>GILMANTON</u> George Twigg, III Stanley O. Bean, Jr.	<u>MEREDITH</u> William Bayard Herbert Vadney	<u>SANBORNTON</u> Earl Leighton, Jr. Patricia Shattuck	

### LAKES REGION PLANNING COMMISSION STAFF

<i>Kimon G. Koulet</i>	Executive Director	<i>Kristen Michaelides</i>	Regional Planner
<i>Peer Kraft-Lund</i>	Senior Planner	<i>Nancy Johnson</i>	Project Planner
<i>Greg Tansley</i>	Principal Planner	<i>Thomas Smith</i>	General Program Assistant
<i>Michael Izard</i>	Regional Planner	<i>Barbara J. Perry</i>	Administrative Assistant
<i>S. Robin McCann</i>	Regional Planner	<i>Karen Peranelli</i>	Bookkeeper

## TABLE OF CONTENTS

	<u>page</u>
Executive Summary	i
I. Introduction	1
II. Background	1
A. Geography	2
B. Recreational Resources	4
C. Historic Resources	7
III. Vacation Travel Trends	10
IV. Demographic Trends	11
A. Population Trends in the Lakes Region	11
B. Population Trends in States That Visit New Hampshire	12
V. Purpose of Trips to New Hampshire	13
VI. Activities in New Hampshire	13
VII. Seasonal Spending Trends	14
VIII. International Tourism Trends	18
IX. Lakes Region Tourism-Related Employment	21
X. Lakes Region Accommodations	23
A. Lodging	24
B. Major Banquet and Exhibition Facilities	25
C. Seasonal Housing - Number of Units	26
D. Seasonal Housing - Per Cent Seasonal and 1990-2000 Changes	28
XI. Traffic Patterns	29
XII. Public Transportation	31
XIII. Airports	31
XIV. Planning For The Future	32
A. Tourism Promotion in the Lakes Region	32
B. Areas of Concern	33
C. Defining and Measuring Tourism in the Lakes Region	36



## **Executive Summary**

A number of substantial changes have occurred in the Lakes Region since the *1995 Lakes Region Tourism Profile* Lakes was published. The Lakes Region's population has increased to 107,032 in 2000 from 92,418 in 1990 or a gain of approximately 16%. In 1994, it was reported that over 15 million people came to visit New Hampshire. In 2000-2001 there were 26.9 million or an increase of almost 80% in less than 10 years. While this increasing tourism certainly represents increases in room and meal taxes to the state, it also has a cost and poses significant challenges and opportunities to maintain the natural and historic beauty of the area.

### **Vacation Travel Trends**

The state of New Hampshire hosted over 26 million visitor trips in 2000. The total spending by tourists is estimated at \$5.2 billion. The Institute for New Hampshire Studies at Plymouth State College estimates that for every dollar spent on tourism, there is a \$9.27 return. Visitors to the Lakes Region come from many states and countries. Most of the visitors arrive from Massachusetts, New Hampshire, New York, Connecticut, Rhode Island, and New Jersey.

The reasons tourists visit New Hampshire are primarily for pleasure and entertainment. Scenic drives, shopping, sightseeing and skiing during the winter months are among the most popular activities.

### **Lakes Region Tourism Employment**

A number of establishments depend on tourism. Specifically, eating and drinking places, apparel and accessory stores, hotels and other lodging places, museums, and amusement and recreation services are among the most affected by tourism trends. There has been a growing trend in hiring foreign-born individuals to meet seasonal employment needs.

The Lakes Region offers tourists a range of restaurants. While most of the dining is casual, there are restaurants that cater to every style and cuisine. In addition, the Lakes Region is home to many major banquet facilities for individuals and businesses. A new exposition center opened in Laconia in 1999. The Winnepesaukee Exposition Center can accommodate 600 people for dinner, hold meetings for 500 people, and has the ability to house 86 8x10 foot exhibition booths.

### **Lakes Region Transportation Accessibility**

The Lakes Region is accessible by good highways and by air. Four airports are located in the Lakes Region. Laconia Airport, the largest, is a general aviation facility which has two full-service FBOs, a global positioning system, and a state of the arts instrument landing system.

## **Planning for the Future**

Promoting tourism and the natural and historic features of the Lakes Region remain a high priority. Since the *1995 Lakes Region Tourism Profile* was published there have been many notable achievements that have enhanced the promotion of tourism.

Three areas of concern continue to be: seasonality, water quality, and public access to lakes, ponds, streams and mountains. As a result, specific and challenging opportunities exist now and in the future. Finding the appropriate balance between the conservation and preservation of the area's natural and historic resources, and the promotion of tourism and economic development, continues to be a dominant issue.

## **I. Introduction**

In 1995, Lakes Region Planning Commission (LRPC) produced its second report on tourism entitled *Lakes Region Tourism Profile*. At the request of the Belknap County Economic Development Council and others interested in tourism in the area and as part of a 2001 New Hampshire Community Development Finance Authority SEED Capacity Grant Program, LRPC has updated this report.

Many of the data reported in 1995 were not available or were not available in the same format. Every effort has been made to maintain the general purpose of the original report. In a number of instances, new data not reported previously are part of this report. With the guidance of the Belknap County Economic Development Council, the Lakes Region Association, and Wentworth Economic Development Council, data on hunting and fishing, skiing, rooms and meals tax distribution, major banquet and exposition facilities, and other new data were included to illustrate the extent and impact of and how the Lakes Region accommodates tourism.

## **II. Background**

New Hampshire has the highest standard of living in the United States, according to PSNH's *The New Hampshire Economic Review 2000*. New Hampshire has the lowest percent of population in poverty. New Hampshire has also been cited as the "most livable state", the safest state, and the healthiest state (Morgan Quitno Corporation, *2001 Most Livable State Study, 2001 Safest State Study and 2001 Healthiest State Study*). No wonder tourism is an important industry in New Hampshire.

The state of New Hampshire hosted 26.05 million visitor trips during 2000. It is reported that during 2000, the total spending by travelers and tourists reached \$5.2 billion. The Institute for New Hampshire Studies at Plymouth State College estimates that for every \$1.00 spent on tourism in the state there is a \$9.27 return on the investment.

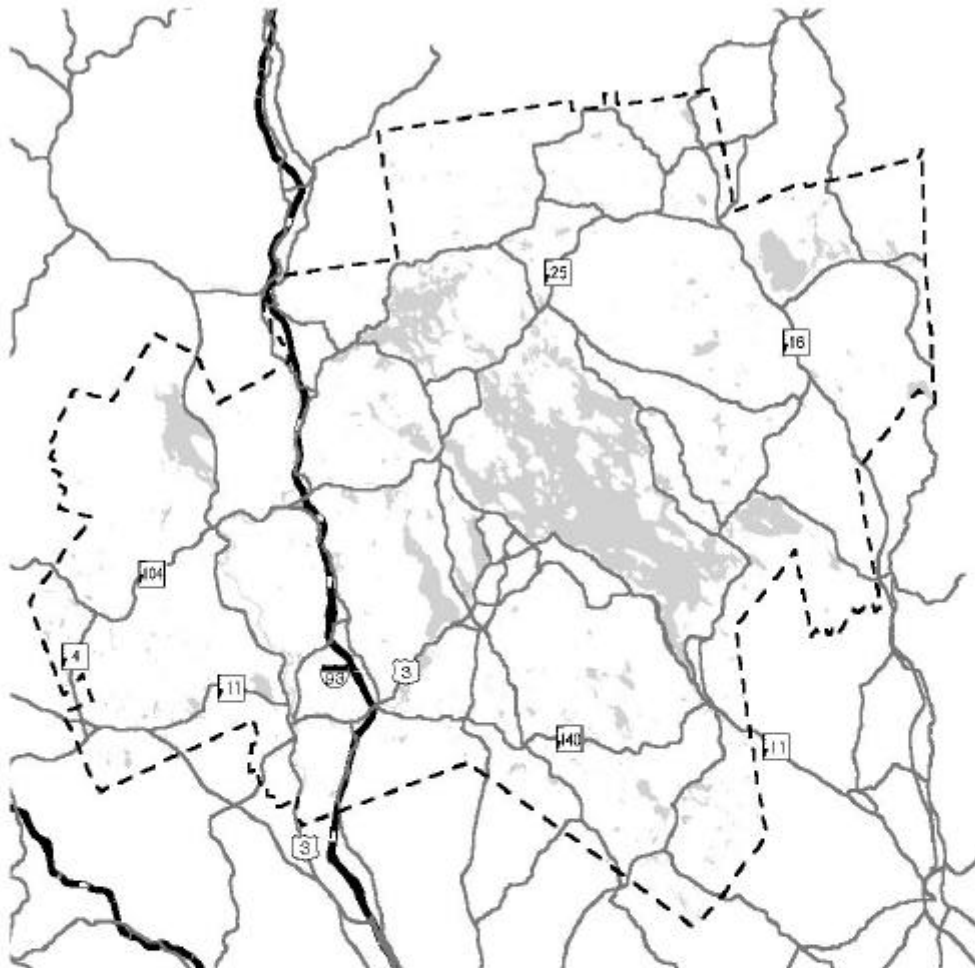
In the Lakes Region, tourism is a thriving business. The geography of the area, the natural and historic resources, and the recreational activities and events attract visitors. The capacity not only to cater to tourists, but also to accommodate business meetings from companies in New Hampshire and from other states and countries, highlights the importance of tourism for economic development.

The following report profiles the region's geography, recreation resources, historic resources, vacation travel trends, demographic trends, seasonal spending trends, international travelers, tourism-related employment, accommodations, major banquet and exhibition facilities, traffic patterns, and airports in the Lakes Region. It concludes with a brief discussion concerning the future of Lakes Region tourism.

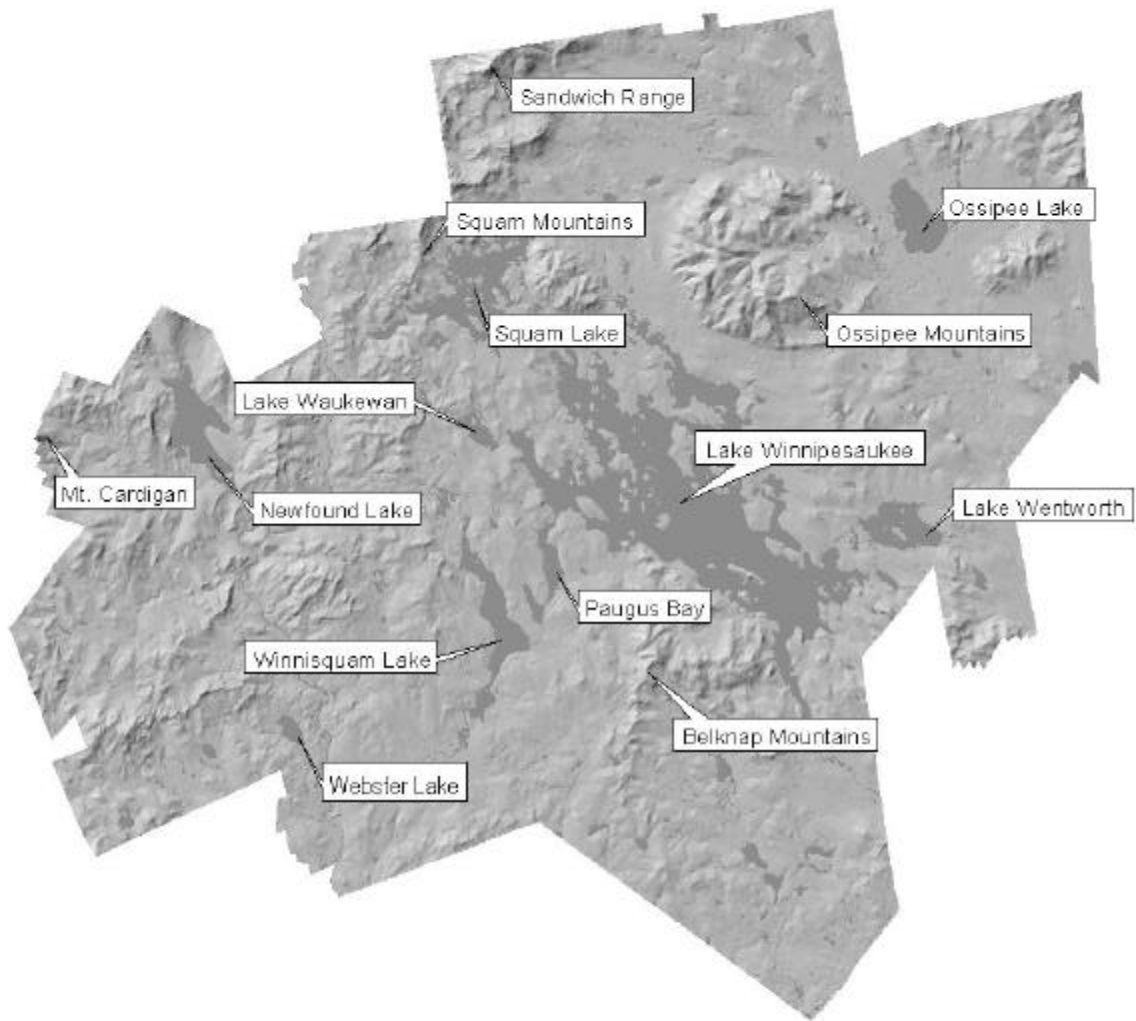
Tourism data for New Hampshire and the Lakes Region specifically were collected with the assistance of the Institute for New Hampshire Studies at Plymouth State College. In addition, the U.S. Census, the National Register of Historic Places, the National Leisure Travel Monitor, the Travel Association of America, the New Hampshire Department of Employment Security, and the NH Fish and Game were major sources of data. A number of web sites also yielded important data and are so noted in the report.

## A. Geography

The Lakes Region is located in central New Hampshire, between Concord, the state capital, to the south and the White Mountains to the north. Interstate 93 provides excellent access to and from major urban population concentrations along the eastern seaboard. The Spaulding Turnpike and NH16 also provide good north-south access from the New Hampshire seacoast. Access from the east and west is provided by NH25 and NH104 in the northern part of the region, and US3/NH11 and NH140 in the more southern section of the region. Travel times to Boston, MA and Portland, ME are both less than two hours.



The municipalities of the Lakes Region are very diverse, ranging from the urbanized centers of Laconia, Meredith, Ashland, Franklin, Tilton, Bristol, and Wolfeboro to the numerous small rural towns scattered throughout the area. The most striking features of the region are the many lakes and ponds, most notably, Lake Winnepesaukee, Winnisquam Lake, the Squams Lakes, Ossipee Lake, Lake Wentworth, Lake Waukewan, and Newfound Lake. These water resources are most evident in Belknap County. Belknap County contains a far greater portion (1/6, equaling 65.5 square miles) of inland water than any other county in New Hampshire. The region borders the White Mountain National Forest to the north, including the Squam Mountains and the Sandwich Range. Other mountains in the area include the Ossipee Range, the Belknap Mountain range and Mt. Cardigan.



Similar to national data that have recently reported the important attributes for vacation plans, the Lakes Region offers many scenic vistas as a result of its mountains and lakes.

“The preservation of scenic beauty continues to be an important attribute when it comes to vacation plans.”

Important Attributes for Vacation Plans:

	<u>2000</u>	<u>2001</u>
Beautiful scenery	83%	86%
Visiting arts/architectural/historic sites	57%	54%
Getting exercise	53%	53%
Hiking and outdoor adventures	39%	42%

Source: *National Leisure Travel Monitor, April, 2001, Yesawich, Peepardine & Brown, and Yankelovich Partners, Inc.* Survey based on a sample of 25,000 people 16 years and older.

## B. Recreation Resources

The Lakes Regions recreation industry offers a broad range of recreational opportunities. Recreational opportunities to tourists include hiking, boating, sailing, canoeing, skiing and snow boarding, golf, fishing (and ice fishing) and hunting, biking, and camping.

As the name evokes, the Lakes Region is dominated by many lakes and ponds. The dominant lake, Lake Winnepesaukee is the largest in the state. Lake Winnepesaukee is the sixth largest natural lake completely inside the U.S. borders. Eight towns border the lake: Alton, Center Harbor, Gilford, Laconia, Meredith, Moultonborough, Tuftonboro, and Wolfeboro. It covers 72 square miles, is 28 miles long and 13 miles wide, and is dotted with a reputed 365 islands. The largest of these islands are Long Island (1,186 acres), Bear Island (780 acres), Cow Island (522 acres) and Governor's Island (504 acres).

Lake cruises are available on the larger lakes during the summer and fall months. In addition there are numerous public beaches, public dock access and private boat rentals. Lake Winnepesaukee has the only floating seasonal U.S. Post Office that has been operating for over 100 years.

Hunting and fishing are traditions in New Hampshire. Lake Winnepesaukee is the premier salmon water. The large lakerainbow trout can be found in Lakes Winnepesaukee, Squam, Winnisquam, Newfound and Wentworth. The trout angler will find good stream fishing opportunities on the Smith, Newfound, Winnepesaukee, Pemigewasset, and Baker rivers. Pond fishing for brook trout is also available throughout the region. For the fly-fishing enthusiast, Highland Lake in Andover, Saltmarsh Pond in Gilford, Sky Pond in New Hampton, and Upper Hall Pond in Sandwich are examples of good destinations.

Ice fishing is also a popular winter sport. The Meredith Rotary Club features an Ice Fishing Derby and a spring Salmon Winni Derby attracts thousands of fishing enthusiasts to Lake Winnepesaukee.

For the hunter, white-tailed deer, black bears, moose and wild turkeys are abundant in New Hampshire and in the Lakes Region.

As evident by the number of licenses sold in New Hampshire, fishing and hunting are traditional sporting activities. Recent data, reported by county, indicate that 26,698 fishing and hunting licenses were sold in Belknap County in 2000, 23,777 were sold in Carroll County, 38,016 were sold in Grafton County, and 31,325 were sold in Merrimack County.

### Total Number of Fish and Game Licenses Sold In Selected Counties, 2000

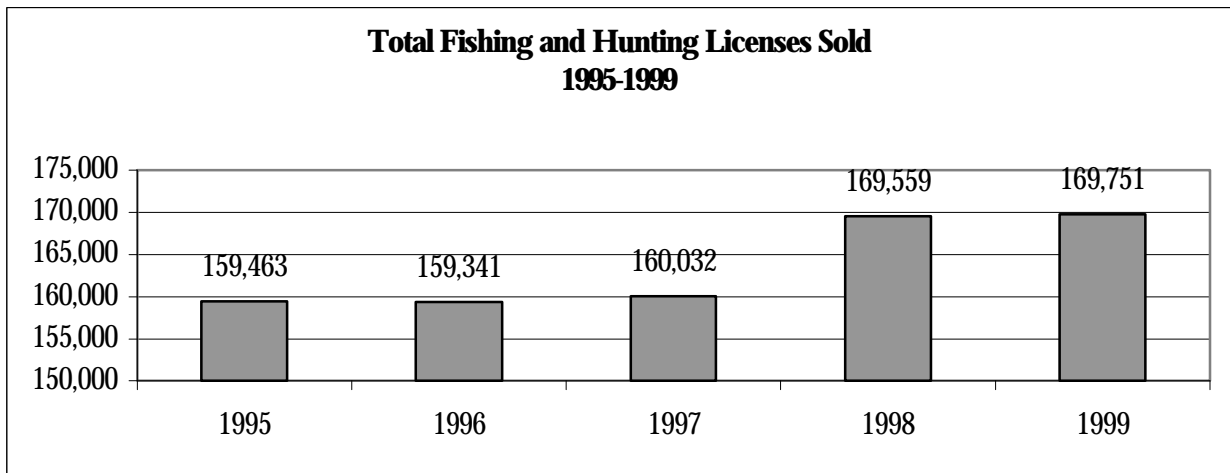
		Approximate % of State
Belknap	26,698	16%
Carroll	23,777	14%
Grafton	38,016	22%
Merrimack	31,325	18%

Source: *New Hampshire Fish and Game, 2000*

**Fishing And Hunting Licenses Sold to Residents and Nonresidents Statewide  
1995-1999**

Sold Licenses	1995	1996	1997	1998	1999
Resident Fishing	67,093	67,637	69,665	74,722	76,175
Non-Resident Fishing	20,314	19,342	19,756	23,708	23,571
Resident Hunting	25,095	25,298	24,053	24,163	23,416
Non-Resident Hunting	9,973	9,664	9,785	10,626	10,347
Resident Combo	36,957	36,362	35,503	34,921	34,694
Non-Resident Combo	31	1,038	1,270	1,419	1,548
<b>Total Fishing and Hunting Licenses</b>	<b>159,463</b>	<b>159,341</b>	<b>160,032</b>	<b>169,559</b>	<b>169,751</b>

Source: *New Hampshire Fish and Game, 2000*



Source: *New Hampshire Fish and Game, 2000*

Wolfeboro lays claim to being “the first summer resort in America,” where tourists enjoy many commercial and recreational activities. Beginning in the summer of 1768, the last provincial governor, John Wentworth, built his vision of the future center of New Hampshire at this spot where the lakes meet the mountains as his summer retreat. Visitors have returned to this picturesque New England village again and again. This "Oldest Summer Resort in America" features the best that this popular vacation area has to offer with quaint shops, superb restaurants, museums and many activities that will fit perfectly into a vacation schedule.

To get to know the Lakes Region, tourists may explore communities like Sandwich, where the state’s New Hampshire League of Crafts Organization was born, or Effingham, with an impressive historic district. In addition there are notable museums and science centers in the Lakes Region. Among them are: The NH Antique and Classic Boat Museum (Wolfeboro), the Wright Museum (Wolfeboro), the Remick Country Doctor Museum and Farm (Tamworth), the Libby Museum (Wolfeboro), Clark House Museum (Wolfeboro), Squam Lakes Natural Science Center (Holderness), the Loon Center (Moultonborough) and Belknap Mill (Laconia), considered to be the official meeting house and the oldest, unaltered, surviving American Industrial Revolution brick mill structure in New Hampshire.

Other recreational resources include the following sixteen public golf courses:

### Public Golf Courses in the Lakes Region

Municipality	Golf Course
Ashland	White Mountain Country Club
Belmont	Lake View Golf Club
Laconia	Bolduc Park Par Three
	Lake View Golf Club
	Pheasant Ridge
Effingham	Providence Lake
Franklin	Franklin Greens
Holderness	Highland Links
Ossipee	Indian Mound
Wolfeboro	Kingswood
Moultonborough	Kona Mansion Inn
	Ridgewood Country Club
Tilton	Lochmere Golf & Country Club
Sanbornton	Den Brae
Meredith	Oak Hill Golf Course
	Waukevan Golf Course

Alpine and cross-country skiing, snow boarding, snowmobiling, dogsledding, snowshoeing, snow tubing, ice sailing, and ice fishing are among the many winter activities in the Lakes Region that attract abundant visitors. Gunstock (Gilford) and Ragged Mountain (Danbury) offer some of the best known alpine skiing in the state. In addition, Gunstock has a notable Nordic ski jump and miles of cross-country trails.

### Alpine Skiing in the Lakes Region

Gunstock (Gilford)	Vertical drop: 1,400 feet Trail acreage: 220 acres Trails: 45 Lifts: 6 lifts; 2 tubing tows Night Skiing: 15 trails, 4 lifts
Ragged Mountain (Danbury)	Vertical drop: 1,250 Trail acreage: 220 Trails: 50 Lifts: 9 lifts

While the Lakes Region has events and attractions that cater to tourists, one notable attraction outside of the region heavily impacts the tourism business in the Lakes Region. In Loudon, New Hampshire, located east of Concord, the New Hampshire International Speedway (NHIS) offers NASCAR and other events that attract many racing fans. The NHIS seats 100,000 fans, and while many arrive in recreational vehicles, most who attend enjoy nearby restaurants and accommodations. During the racing season signs that welcome race fans are conspicuously posted by many local merchants in area towns.

Finally, the Lakes Region is especially known for the week-long Motorcycle Week held during the second week of June. According to the Laconia Rally and Race Week Association, in 2001, approximately 320,000 bikers rode to the Weirs Beach area in Laconia to buy and sell motorcycle accessories, participate in bike races and other bike trials, tour the area, and enjoy the restaurants, entertainment, and scenic beauty of the area.

### **C. Historic Resources**

Historic tourism also generates ways for communities to prosper economically while retaining the historical characteristics that make communities special. Historic tourism also promotes the concept that increased tourism should not destroy the qualities that attract tourists to the Lakes Region. Many of the villages and communities in the Lakes Region are reminiscent of the region in the nineteenth century. The many mountains and lakes provide scenic vistas that enhance the communities' settings and attract tourists.

The preservation of historical, architectural, and archeological resources in New Hampshire is under the jurisdiction of the New Hampshire Division of Historic Resources. This agency, also known as the State Historic Preservation Office, is supported by the state of New Hampshire, the federal Historic Preservation Fund allocated through the National Park Service of the U.S. Department of the Interior, and private donations.

Municipalities may also create local heritage commissions. An Heritage Commission may become involved in a range of activities aimed at protecting cultural and historical resources, and can be empowered to accept and expend funds through a non-lapsing heritage fund.

The Lakes Region's historic districts vary greatly in size, from the small downtown districts of the villages of Center Harbor, Alton, and Andover to the districts encompassing Center Sandwich village, downtown Tilton, and most of central Franklin. Walking tours of historic structures and sites are popular in Meredith, Ossipee, Tilton/Northfield, and Alton.

The following provides an overview of the historic qualities of the Lakes Region. Currently, there are twelve National Register Historic Districts and eighty-one individual National Register Historic Places in the Lakes Region.

### Lakes Region Municipalities with National Register Historic Districts

Alton	Hebron
Andover	Hill
Bristol	Laconia
Center Harbor	Sanbornton
Effingham	Sandwich
Franklin	Tilton

**Source: *National Register of Historic Places* [www.nr.nps.gov](http://www.nr.nps.gov)**

The following provides properties listed on the National Register of Historic Places in the Lakes Region by municipality.

### Lakes Region Municipalities with National Register Historic Properties

<b>Municipality</b>	<b>Property</b>	<b>Circa</b>
Alton	Alton Bay Railroad Station	1907
	First Free Will Baptist Church	1848
	First Congressional Church	1853-1854
	Second Free Baptist Church	1853-1854
Andover	Bog Bridge	1887
	Keniston Bridge	1882
	Potter Place Railroad Station	1874
	Durgin-Gersham House	1815
Ashland	Ashland Town Hall	1871
	Ashland Junior High School	1877
	St. Mark's Episcopal Church	1859
	First Free Will Baptist Church	1870
	Whipple House	1837
	Ashland Grist Mill and Dam	1903
	Ashland Railroad Station	1891
Barnstead	Oscar Foss Memorial Library	1916-1917
Belmont	Belmont Public Library	1927-28
Bristol	Minot-Sleeper Library	1884
Brookfield	Brookfield Town Hall	1822
Danbury	South Danbury Christian Church	1867
Franklin	Daniel Webster Family House	1800
	Sulphite Railroad Bridge	1896-97
Gilford	Kimball Castle	1894
	John J. Morrill Store	1857-58
Gilmanton	Gilmanton Academy	1894-95
	Centre Congressional Church	1826-27
	Smith Meeting House	1840
	Gilmanton Iron Work Library	1916-1917
	First Baptist Church of Gilmanton	1842
Hill	Hill Center Church	1847
Holderness	Holderness Free Library	1909-1910
	Trinity Church	1797

### Lakes Region Municipalities with National Register Historic Properties (cont'd)

<b>Municipality</b>	<b>Property</b>	<b>Circa</b>
Holderness	Webster Estate	1896
	North Holderness Free Will Baptist Church	1860
	Holderness Inn	1895-96
Laconia	Laconia District Court	1886-87
	Gale Memorial Library	1901-03
	Goss Reading Room	1904-06
	Evangelical Baptist Church	1871
	United Baptist Church of Lakeport	1891-92
	Belknap-Suloway Mill	1823
	Busiel-Seeburg Mill	1853 & 1878
	Laconia Passenger Station	1891-92
	John W. Busiel House	1865
	Endicott Rock	*
Meredith	US Post Office	1917
	Meredith Public Library	1900-01
	First Freewill Baptist Church (aka Oak Mill Meetinghouse)	1802 remodeled 1848
Moultonborough	Windermere	1891-1903
	Freese's Tavern	1780
	Swallow Boathouse	1908-10
	Moultonborough Town House	1834
New Hampton	Dana Meeting House	1800-02
	Gordon Nash Library	1895
	Washington Mooney House	1800
	New Hampton Community Church	1798, Rebuilt 1872
	New Hampton Town House	1872
Northfield	Hall Memorial Library	1885-86
	Northfield Union Church	1883
	Memorial Arch of Tilton	1882-83
Ossipee	Whittier Bridge	1870
	First Free Will Baptist Church	1856-1857
	Early Settlers Meetinghouse	1812, Rebuilt 1856
Sanbornton	Bay Meeting House and Vestry	1836
Sandwich	Sandwich Town Hall	1913
	North Sandwich Friends Meeting House	1881
	Bradbury Jewell House	1802
	Hansen's Annex	1820
Tamworth	Durgin Bridge	1869
	Cook Memorial Library	1895
	Capt. Enoch Remick House	1805, remodeled 1830 and 1850

### Lakes Region Municipalities with National Register Historic Properties (cont'd)

Municipality	Property	Circa
Tilton	House by the Side of the Road	1783
	Charles F. Tilton Mansion	1861
	Tilton Island Park Bridge	1881
Tuftonboro	Tuftonboro United Methodist Church	1853
Wolfeboro	Brewster Memorial Hall	1888-90
	Wolfeboro Centre Community Church	1841
	Union Church	1845
	Cotton Mountain Community Church	1852
	Libby Museum	1912
	Clark House	1778

\* Endicott Rock has probably been in place since the last Ice Age. It was inscribed in 1652, “rediscovered” in 1832 and enclosed by the existing granite structure in 1892.

In addition, three archeological sites exist in the Lakes Region: the Weirs Aquaduct Archeological Site and Endicott Rock in Laconia, and Lochmere Archeological District in Belmont and Tilton.

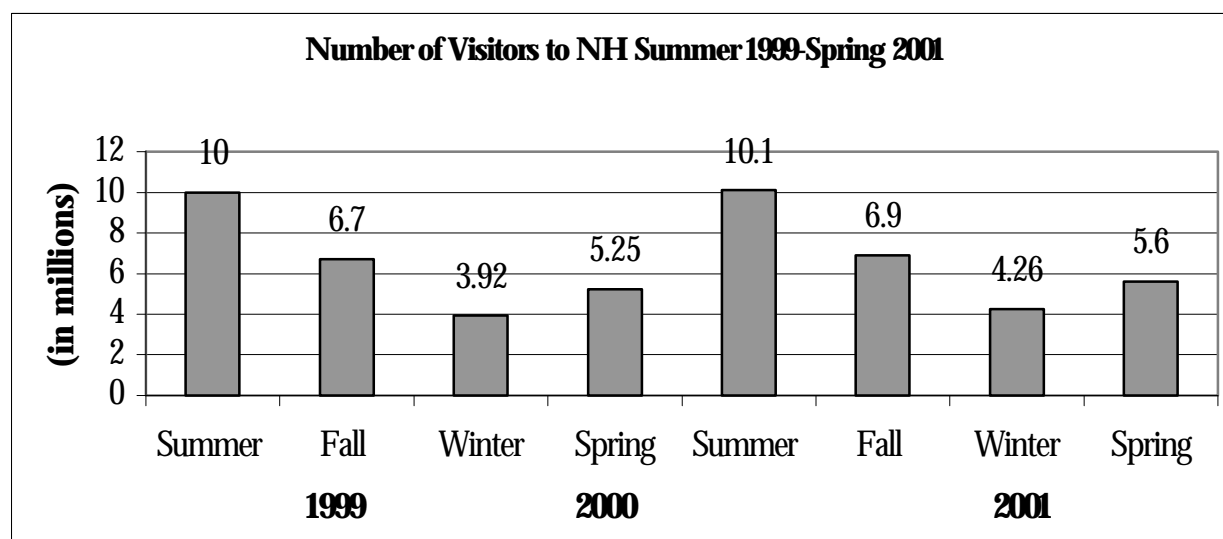
Source: *National Register of Historic Places* www.nr.nps.gov and *New Hampshire Division of Historical Resources*.

### III. Vacation Travel Trends

Tourism and travel data have been compiled at the regional, state and national levels. Unfortunately, this information is generally only available at the state level, making analysis difficult. In addition, data are not always collected consistently from one year to the next.

The following includes data from the U.S. Census, state agencies, the Travel Association of America, and various publications from the Institute for New Hampshire Studies.

In 1999-2000, there were over 25 million trips made to New Hampshire; between 2000-2001, there were over 26 million trips made.



Source: *Institute for New Hampshire Studies, 1999, 2000, 2001*

### Number of Visitors To New Hampshire by Season, 1999-2000

	Number of Trips (millions)	Annual Total
Summer 1999	10.0	
Fall 1999	6.70	
Winter 1999-2000	3.92	
Spring 2000	5.25	<b>25.87</b>
Summer 2000	10.1	
Fall 2000	6.90	
Winter 2000-2001	4.26	
Spring 2001	5.60	<b>26.86</b>

Source: *Institute for New Hampshire Studies, 1999, 2000, 2001*

Most visitors to New Hampshire reside in states with large populations in close proximity to New Hampshire. They include Massachusetts, New Hampshire, New York, Connecticut, Rhode Island, and New Jersey.

### Visitors to New Hampshire from State of Residence

State/Country	Summer 1999	Fall 1999	Winter 1999	Spring 2000
Massachusetts	31.6%	30.9%	44.0%	29.3%
New Hampshire	8.6%	9.1%	2.2%	6.0%
New York	7.8%	7.3%	5.2%	5.2%
Connecticut	9.8%	5.5%	6.0%	7.8%
Rhode Island	5.7%	5.5%	9.7%	7.8%
New Jersey	7.8%	4.5%	4.5%	1.7%
Maryland	N/A	4.5%	4.5%	5.2%
Pennsylvania	2.5%	3.6%	1.5%	0.0%
Europe/Overseas	.8%	3.6%	1.4%	1.7%
Florida	4.9%	2.7%	3.0%	3.4%
Canada	1.6%	2.7%	1.4%	3.4%
Other States	18.9%	17.4%	12.9%	13.0%
Other New England States	4.8%	1.8%	6.0%	12.9%
Total	100%	100%	100%	100%

Source: *Institute for New Hampshire Studies, 1999, 2000*

## IV. Demographic Trends

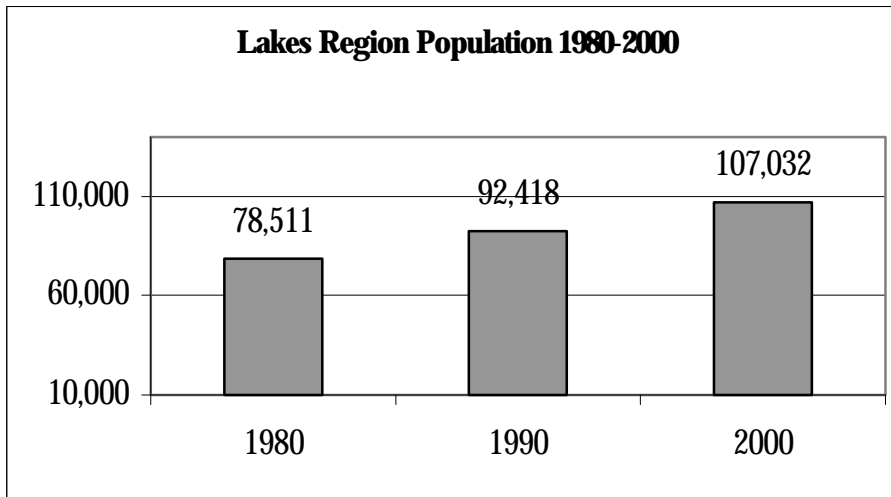
### A. Population Trends in the Lakes Region

The Lakes Region experienced a 15.8% increase in population between 1990 and 2000 and a 36.3% increase between 1980 and 2000.

#### Population Trends

	1980	1990	2000	Per Cent Change '90-'00
<b>Lakes Region</b>	78,511	92,418	107,032	15.8%
<b>New Hampshire</b>	920,475	1,109,252	1,235,785	11.4%

Source: *1980, 1990, and 2000 U.S. Census*



Source: 1980, 1990, and 2000 U.S. Census

### B. Population Trends in States That Visit New Hampshire

The primary market for the Lakes Region includes the New England states, New York, and New Jersey. There were approximately 39 million people living in this market in the year 2000. New York represents the largest market followed by New Jersey and Massachusetts.

Between 1990 and 2000, New Hampshire's population increased the most (11.4%) followed by New Jersey (8.8%).

The large population represented by New England, New York and New Jersey and their proximity to New Hampshire illustrates the opportunity for the Lakes Region to appeal to these markets for short-distance, day and weekend trips.

### Population Trends

State	1980	1990	2000	Per Cent Change '90-'00
Massachusetts	5,737,000	6,016,000	6,349,000	5.5%
New Hampshire	921,000	1,109,000	1,236,000	11.4%
New York	17,558,000	17,990,000	18,976,000	5.5%
Connecticut	3,108,000	3,287,000	3,406,000	3.6%
Rhode Island	947,000	1,003,000	1,048,000	4.5%
New Jersey	7,365,000	7,730,000	8,414,000	8.8%
<b>Total</b>	<b>35,636,000</b>	<b>37,135,000</b>	<b>39,429,000</b>	<b>6.2%</b>

Source: 1980, 1990, and 2000 U.S. Census

## V. Purpose of Trips to New Hampshire

Visitors come to New Hampshire primarily for pleasure and entertainment.

### Purpose of Trips to New Hampshire

	Summer 1999	Fall 1999	Winter 1999	Spring 2000
Pleasure/Entertainment	65.3%	61.9%	60.0%	52.5%
Visit Friends/Relatives	23.9%	20.4%	19.3%	25.8%
Business/Shopping	3.3%	3.7%	8.1%	10.0%
Other	7.5%	14.0%	12.6%	11.7%

Source: *Institute for New Hampshire Studies, 1999, 2000*

## VI. Activities in New Hampshire

Scenic drives, shopping, sightseeing and skiing in the winter are among the most popular activities enjoyed by visitors to New Hampshire. Unlike the other New England states, New Hampshire has no sales tax. The lack of a sales tax has been touted as an advantage for tourism and residents. Hiking and visiting New Hampshire's national and state forests are also popular activities. There are many hiking trails for beginners and expert hikers. In the Lakes Region, scenic vistas are interspersed among sparkling lakes and undulating, tree-covered mountains.

### Activities in New Hampshire

Activity	Summer 1999	Fall 1999	Winter 1999	Spring 2000
State Parks/National Forests	43.3%	45.9%	23.9%	29.8%
Scenic Drives	57.3%	70.6%	34.1%	48.8%
Shopping	56.7%	56.0%	43.5%	47.1%
Visit Friends/Relatives	39.7%	32.1%	34.1%	38.8%
Sightseeing	50.6%	59.6%	29.7%	42.5%
Hiking	31.6%	31.2%	13.0%	23.1%
Historic Sites/Museums	21.9%	27.5%	4.3%	9.9%
Skiing	0.0%	3.7%	44.2%	19.8%

Source: *Institute for New Hampshire Studies, 1999, 2000*

The New Hampshire Scenic Byway Program has a long history. Through the 1960's and 1970's, nine easements were purchased; in 1974 an extensive scenic road and parkway study was conducted by the New Hampshire Department of Transportation; and in 1976 a bicentennial Yankee Trail auto tour was researched and marketed to visitors. These tours have recently been evaluated and, as appropriate, designated part of the New Hampshire Scenic and Cultural Byway Program. In 1974, the state Scenic Byway system identified 67 miles of roadway in the Lakes Region as the Lakes Region Tour. One end of the Lakes Tour Scenic Byway begins at the traffic circle in the town of Alton on Route 28. From the circle, the Byway travels north along NH 28 to intersect

with NH 109 in the village of Wolfeboro. The Byway then follows NH 109 through Wolfeboro, Tuftonboro, and Moultonborough to NH 109's intersection with NH 25. At the intersection of Routes 109 and 25, the Byway forms a "T". The northeast arm follows NH 25 easterly to the Watson Corner intersection of Route 16 in West Ossipee. The northwest arm of the T continues through the towns of Moultonborough and Center Harbor to downtown Meredith. Here NH 25 joins US 3 and travels north. Leaving the downtown, the Byway route continues north until it reaches the intersection of NH 175 in Holderness. NH 175 leads the Byway to the northern boundary of Holderness and Plymouth, the northern terminus of the Lakes Tour.



Shopping in the Lakes Region offers a multiplicity of experiences. In Tilton, 53 retail stores are offered at the Lakes Region Factory Outlet. Other major retailers at this location include Staples, Wal-Mart, Home Depot, and B.J.'s. Small specialty stores are offered in many towns in the Lakes Region including Wolfeboro, Laconia, Meredith, and Center Harbor. Antique shops dot the region as do garden/farm stands and local crafts. In the winter, visits to sugar houses are also a popular activity.

Four popular state parks are located in the Lakes Region. They are Wellington State Park in Bristol, Wentworth State Park in Wolfeboro, Ellacoya State Park in Gilford and White Lake State Park in Tamworth. Ellacoya State Park is located on the southwest shore of Lake Winnepesaukee. The 600 foot sandy beach, with views across the lake to the Sandwich and Ossipee mountains, is a great place to spend time with the family. White Lake State Park offers some of the best swimming in the White Mountain region. The park lies along the shore of White Lake, which is an example of a typical glacial lake. Visitors are welcome to enjoy a leisurely walk around the lake on a well-maintained footpath while looking for loons or signs of beaver activity, or to try their hand at the good trout fishing the lake provides.

## VII. Seasonal Spending Trends

Visitors spend billions of dollars each year in New Hampshire. In 1998, visitors to New Hampshire spent over three billion dollars. The majority of the spending was on eating and drinking, followed by shopping and recreation.

**New Hampshire Traveler Spending, 1998  
(Millions of Dollars)**

Eating and drinking	\$782	25.2%
Retail stores	\$600	19.3%
Recreation	\$538	17.3%
Lodging accommodations	\$387	12.5%
Services	\$323	10.4%
Ground transportation	\$228	7.3%
Food stores	\$247	8.0%
<b>Total</b>	<b>\$3,105</b>	<b>100%</b>

Source: *Institute for New Hampshire Studies, 1998*

Seasonally, the average daily money spent per person per trip in New Hampshire varies slightly and has increased. In 1992, the average daily money spent per person was approximately \$33.13. In 1999-2000, the average was \$48.56 or a 47% increase. This comparison does not take into consideration inflation.

**Average Daily Money Spent Per Person Per Trip In New Hampshire**

Summer 1992	\$32.37
Fall 1992	\$36.00
Winter 1992	\$31.01
Summer 1999	\$45.42
Fall 1999	\$47.90
Winter 1999	\$55.13
Spring 2000	\$45.80

Source: *Institute for New Hampshire Studies, 1999, 2000*

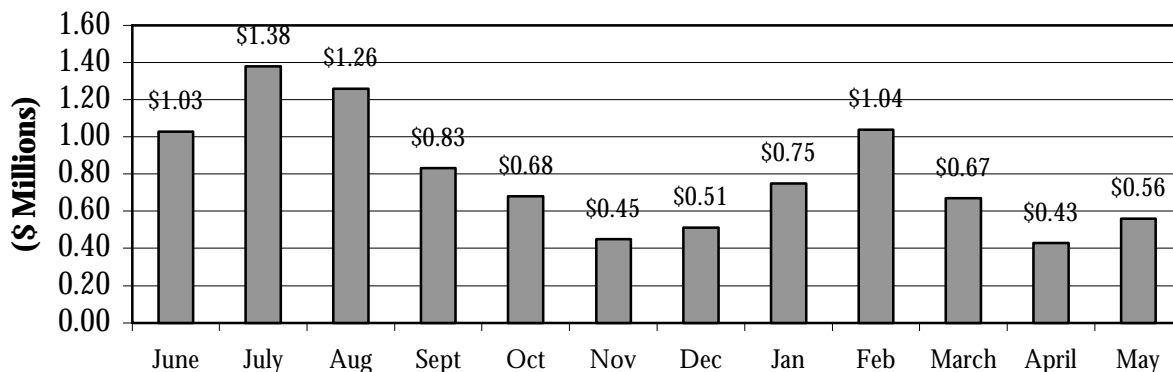
The amount of rooms and meals tax collected in New Hampshire, and specifically in the Lakes Region, also varies by month. As the following table illustrates for Belknap County, the summer months bring in the most rooms and meals tax. During January and February, when skiing is popular, there is also an increase in rooms and meals tax.

**Rooms and Meals Tax for Belknap County  
June 2000-May 2001**

	Belknap County
June 2000	\$1,032,830
July 2000	\$1,380,500
August 2000	\$1,260,133
September 2000	\$830,058
October 2000	\$683,119
November 2000	\$447,272
December 2000	\$510,724
January 2001	\$747,729
February 2001	\$1,038,265
March 2001	\$667,613
April 2001	\$427,410
May 2001	\$556,345
Total	\$9,581,998

Source: *Department of Revenue Administration, 2001*

### Belknap County Rooms and Meals Taxes 2000-2001



Source: *Department of Revenue Administration, 2001*

Based on a population-based formula, the state distributes a percentage of the rooms and meals tax back to municipalities. (See Box Below)

#### Rooms & Meals Tax Distribution Chapter 352, NH Laws of 1993 Fiscal Year 2001

A. Fiscal Year 2000 Rooms & Meals Tax Revenues	\$149,096,971
B. Cost of Administration	\$ 1,573,236
C. Net Rooms & Meals Tax Revenues	\$147,523,735
D. Fiscal Year 1999 Rooms & Meals Tax Revenues	\$137,258,084
E. Increase/(Decrease)	\$ 10,265,651
F. 75% of Increase in Revenues	\$ 7,699,238
G. Lesser of F. or \$5,000,000	\$ 5,000,000
H. Fiscal Year 1999 Distribution	\$ 22,427,183
I. Total Amount To Be Distributed	\$ 22,427,183

Example: The population of Alton was 3,534 or .2% of the state population of 1,202,088. .2% of \$22,427,183 = \$80,700.

In fiscal year 2001 (June 2000-May 2001) the state collected \$149,096,971 in rooms and meals tax and distributed \$22,427,183 or approximately 18% back to towns and cities. The rooms and meals tax data are not readily available by town, but are by county. Using Belknap County as an indicator for the Lakes Region, \$9,581,998 in rooms and meals tax were paid, and the county received \$1,204,744 in return.

In the Lakes Region, Laconia received the greatest rooms and meals tax (\$392,767) and Hebron received the smallest distribution (\$9,796).

The distribution of the rooms and meals tax for fiscal year 2001 by municipality, for the Lakes Region and by counties is presented in the following table:

### Rooms and Meals Tax Distribution, Fiscal Year 2001

County	Municipality	Total Distribution
Belknap	Alton	\$80,700
	Barnstead	\$75,174
	Belmont	\$144,159
	Center Harbor	\$24,068
	Gilford	\$137,514
	Gilmanton	\$63,345
	Laconia	\$392,767
	Meredith	\$117,419
	New Hampton	\$41,104
	Sanbornton	\$52,338
	Tilton	\$76,156
	<b>Total</b>	
Carroll	Brookfield	\$12,422
	Effingham	\$21,762
	Freedom	\$22,310
	Moultonborough	\$120,114
	Ossipee	\$77,708
	Sandwich	\$25,576
	Tamworth	\$51,379
	Tuftonboro	\$44,095
	Wolfeboro	<b>\$120,114</b>
	<b>Total*</b>	
Grafton	Alexandria	\$30,805
	Ashland	\$46,356
	Bridgewater	\$19,273
	Bristol	\$61,244
	Hebron	\$9,796
	Holderness	\$40,578
<b>Total*</b>		<b>\$208,052</b>
Merrimack	Andover	\$45,693
	Danbury	\$21,990
	Franklin	\$193,255
	Hill	\$20,049
	Northfield	\$103,855
<b>Total*</b>		<b>\$384,842</b>
<b>Lakes Region Total</b>		<b>\$2,248,750</b>

\* Total reflects Lakes Region portion of county

Source: *NH Department of the Treasury, Division of Distribution, 2001*

## VIII. International Tourism Trends

The close proximity of Canada and Mexico to the United States is evident in the number of visitors from these countries. In 1998, 13.4 million Canadians and 9.3 million Mexicans visited the United States. Japan and the United Kingdom ranked third and fourth respectively in visitors to the United States.

**International Visitors to the United States by Country of Origin, 1998  
(in millions)**

Canada	13.4
Mexico	9.3
Japan	4.9
United Kingdom	4.0
Germany	1.9
France	1.0

Source: 2000 *International Outlook for Travel and Tourism*, Travel Association of America,

Historically, the numbers of Canadian, Mexican and Japanese visitors have varied. In 1991, 19.1 million Canadians visited the United States. Since 1991, the numbers of Canadian visitors have tended to decline. In contrast, the number of Mexican and Japanese visitors to the United States have tended to increase.

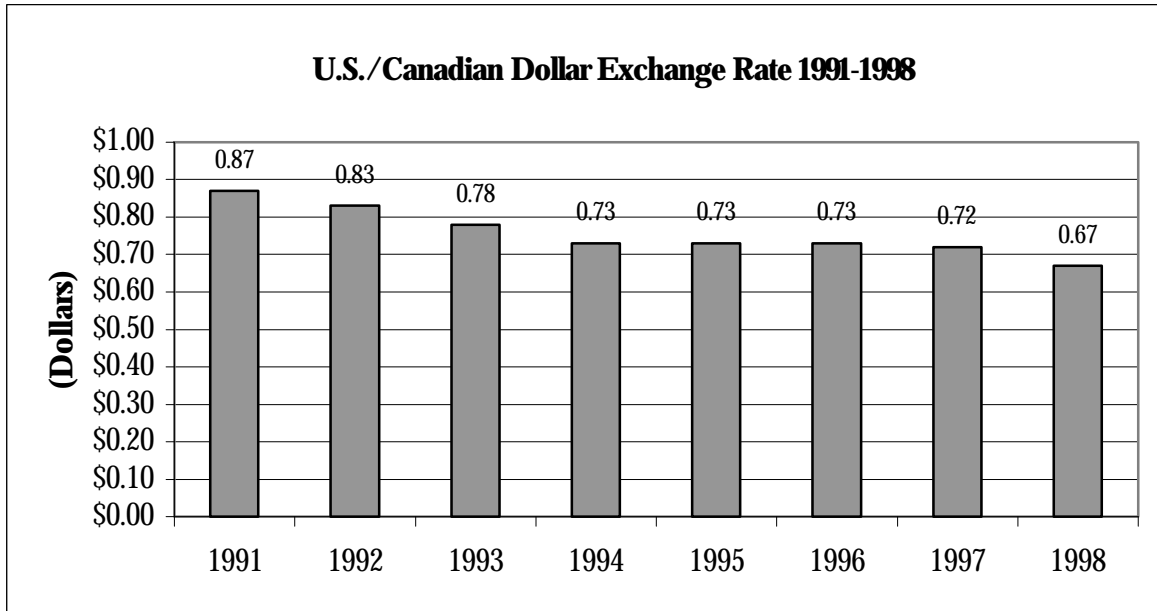
**Canadian, Mexican, and Japanese Visitors To the US  
1991-1998  
(in millions)**

	Canada	Mexico	Japan
<b>1991</b>	19.1	7.4	3.3
<b>1992</b>	18.6	10.9	3.6
<b>1993</b>	17.3	9.8	3.5
<b>1994</b>	15.0	11.3	3.8
<b>1995</b>	14.7	8.0	4.5
<b>1996</b>	15.3	8.5	5.1
<b>1997</b>	15.1	8.4	5.4
<b>1998</b>	13.4	9.3	4.9

Source: 2000 *International Outlook for Travel and Tourism*, Travel Association of America,

The relationship between the number of Canadian visitors and the exchange rate is a very strong positive correlation; as the exchange rate of the Canadian dollar decreases, the number of visitors decrease. Between 1991 and 1998, the exchange rate of the Canadian dollar and the U.S. dollar declined from a high of \$.87 in 1991 to a low of \$.67 in 1998.

The Canadian dollar remained at \$.67 U.S. in 1999 and 2000.



Source: 2000 International Outlook for Travel and Tourism, Travel Association of America, 1999.

Because of the close proximity to New England and New Hampshire, Canadians are among the most frequent visitors. In 1994, over 2.6 million Canadians visited New England and 345,000 visited New Hampshire. Since 1994, the number of Canadian visitors to New England and New Hampshire appears not to be directly affected by the exchange rate in the same way the exchange rate affects the total U.S. visits. Between 1994 and 2000, the exchange rate decreased. During that same period, the number of Canadian visitors to New England and to New Hampshire varied.

**Canadian Visits To New England and New Hampshire, 1994-2000  
(000's)**

	<b>New England</b>	<b>% Change</b>	<b>New Hampshire</b>	<b>% Change</b>
<b>1994</b>	<b>2,623</b>	-	<b>345</b>	-
<b>1995</b>	<b>2,679</b>	<b>2.1%</b>	<b>418</b>	<b>21.2%</b>
<b>1996</b>	<b>2,700</b>	<b>.8%</b>	<b>405</b>	<b>-3.1%</b>
<b>1997</b>	<b>2,659</b>	<b>-1.5%</b>	<b>313</b>	<b>-22.7%</b>
<b>1998</b>	<b>1,753</b>	<b>-34.1%</b>	<b>256</b>	<b>-18.2%</b>
<b>1999</b>	<b>2,136</b>	<b>21.8%</b>	<b>306</b>	<b>19.5%</b>
<b>2000</b>	<b>1,968</b>	<b>-7.9%</b>	<b>299</b>	<b>-2.3%</b>

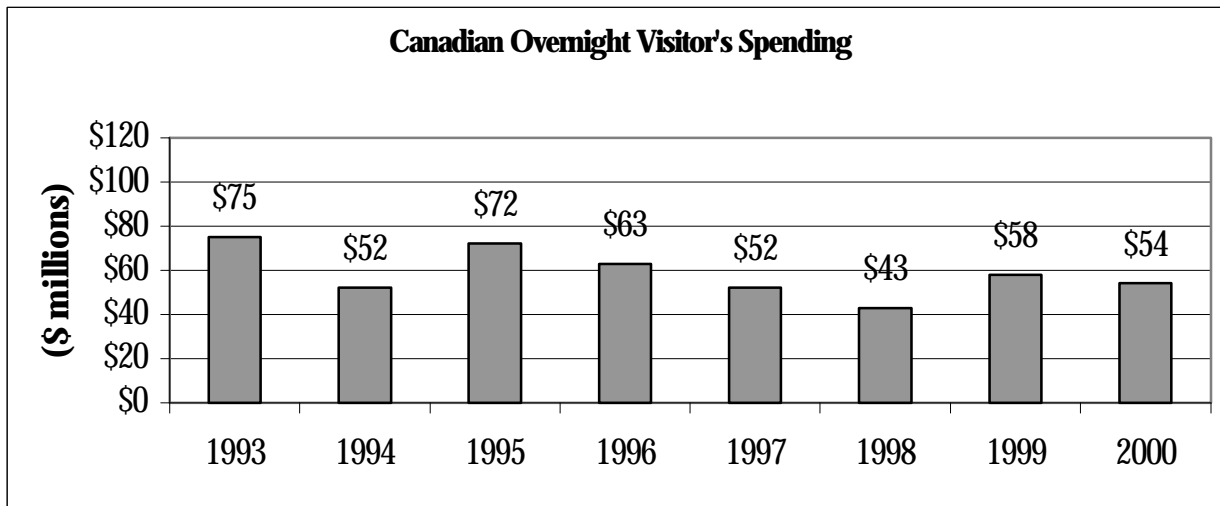
Source: Overseas and Canadian Visitors to New Hampshire 2000, The Institute for New Hampshire Studies, 2001

Spending by overnight Canadian visitors between 1993 and 2000 has varied, probably in part due to the exchange rate. In 1993, Canadian overnight visitors spent approximately \$75 million in New Hampshire; in 2000 they spent \$54 million. While the total expenditures have decreased between 1993 and 2000 by 28%, the average U.S. dollars spent per day has only decreased from \$126 in 1993 to \$123 in 2000. It appears that while the number of Canadian visitors has decreased, their average daily spending has not significantly decreased.

**Canadian Overnight Visitors to New Hampshire and Expenditures Made  
1993-2000**

	<b>\$ Expended (millions)</b>	<b>Average U.S. Dollars per day</b>
1993	\$75	\$126
1994	\$52	\$110
1995	\$72	\$128
1996	\$63	\$115
1997	\$52	\$119
1998	\$43	\$110
1999	\$58	\$128
2000	\$54	\$123

Source: *Overseas and Canadian Visitors to New Hampshire 2000, The Institute for New Hampshire Studies, 2001*



Source: *Overseas and Canadian Visitors to New Hampshire 2000, The Institute for New Hampshire Studies, 2001*

In recent years, there have been efforts to attract European visitors through trade missions. The Governor of New Hampshire has made a number of trips to Europe, including Germany, Denmark, the United Kingdom and Ireland. These efforts were designed to attract more visitors to New Hampshire from Europe.

## IX. Lakes Region Tourism-Related Employment

To discern the trends of tourism-related employment, data for the Laconia Labor Market were compiled. Since the Laconia Labor Market is not defined exactly as the same area as Lakes Region Planning Commission's market, the data are for illustrative purposes only. The Laconia Labor Market includes, but is not limited to, Alton, Belmont, Center Harbor, Gilford, Gilmanton, Laconia, Meredith, Moultonborough, Sanbornton, and Sandwich.

Between 1997 and 1999, there were increases in tourism-related employment. With the exception of apparel employment, which declined, the annual average employment per category in the Laconia Labor Market increased between 11-68 jobs.

### Tourism-Related Annual Average Employment Laconia Labor Market, 1997 and 1999

	1997	1999	Change
Eating and Drinking	1,983	2,013	+30
Apparel	164	148	-16
Hotels	643	654	+11
Amusement and Recreation	374	442	+68
Total	3,164	3,257	+93

Source: 1997 and 1999 Profile of New Hampshire and its Eighteen Labor Market Areas, New Hampshire Employment Security

Total tourism-related wages by quarter for the Laconia Labor Market Area in 1994 as compared to 1999 indicate some increases. Eating and Drinking establishment wages increased from \$16.6 million in 1994 to \$23.0 million in 1999. Apparel wages decreased from \$2.4 million in 1994 to \$1.8 million in 1999; hotel wages increased from \$6.3 million in 1994 to \$9.9 million in 1999 and Amusement and Recreation wages increased from \$4.7 million in 1994 to \$5.9 million in 1999.

Total tourism-related wages increased from \$30.0 million in 1994 to \$40.6 million in 1999 or an increase of over 35%.

### Tourism-Related Total Wages by Quarter, Laconia Labor Market Area 1994, 1997 and 1999 (millions of dollars)

1994	Eating and Drinking	Apparel	Hotels	Amusement and Recreation	Total
1 <sup>st</sup> Quarter	\$2.9	\$.5	\$1.1	\$.8	\$5.3
2 <sup>nd</sup> Quarter	\$3.9	\$.5	\$1.3	\$1.0	\$6.7
3 <sup>rd</sup> Quarter	\$6.1	\$.7	\$2.5	\$1.9	\$11.2
4 <sup>th</sup> Quarter	\$3.7	\$.7	\$1.4	\$1.0	\$6.8
Total	\$16.6	\$2.4	\$6.3	\$4.7	\$30.0

**Tourism-Related Total Wages by Quarter, Laconia Labor Market Area 1994, 1997 and 1999**  
**(millions of dollars)**  
**(continued)**

1997	Eating and Drinking	Apparel	Hotels	Amusement and Recreation	Total
1 <sup>st</sup> Quarter	\$3.5	\$.6	\$1.3	\$.8	\$6.2
2 <sup>nd</sup> Quarter	\$4.6	\$.7	\$1.7	\$1.0	\$8.0
3 <sup>rd</sup> Quarter	\$6.7	\$.6	\$3.1	\$1.9	\$12.3
4 <sup>th</sup> Quarter	\$4.7	\$.6	\$1.9	\$1.0	\$8.2
Total	\$19.5	\$2.5	\$8.0	\$4.7	\$34.7

1999	Eating and Drinking	Apparel	Hotels	Amusement and Recreation	Total
1 <sup>st</sup> Quarter	\$4.0	\$.4	\$1.7	\$1.1	\$7.2
2 <sup>nd</sup> Quarter	\$5.4	\$.5	\$2.2	\$1.3	\$9.4
3 <sup>rd</sup> Quarter	\$8.1	\$.5	\$3.7	\$2.2	\$14.5
4 <sup>th</sup> Quarter	\$5.5	\$.4	\$2.3	\$1.3	\$9.5
Total	\$23.0	\$1.8	\$9.9	\$5.9	\$40.6

*Source: 1997 and 1999 Profile of New Hampshire and its Eighteen Labor Market Areas, New Hampshire Employment Security*

The average weekly wages for tourism-related industries in the Laconia Labor Market and for New Hampshire are illustrated below.

**Average Weekly Wages for Tourism-Related Industries in the Laconia Labor Market and New Hampshire, 1999**

	Eating and Drinking	Apparel	Hotels	Amusement and Recreation
Laconia Labor Market	\$219.21	\$256.20	\$289.21	\$259.64
New Hampshire	\$228.66	\$260.10	\$297.20	\$270.89

*Source: 1999 Profile of New Hampshire and its Eighteen Labor Market Areas, New Hampshire Employment Security*

A number of establishments depend on tourism. Specifically, eating and drinking places, apparel and accessory stores, hotels and other lodging places, museums, and amusement and recreation services are among the most affected by tourism trends, and conversely, tourists depend on the availability and convenience of these establishments. Data, unfortunately, are not available by town or by the Lakes Region. However, the Lakes Region includes all of Belknap, and portions of Carroll, Grafton and Merrimack counties. For illustrative purposes, Belknap and Carroll counties are used as surrogates for the Lakes Region overall. The changes in the number of establishments catering to tourism, with one exception, has not been dramatic. In fact, very little has changed. The one exception is that between 1992 and 1999 there was a decrease of 32 apparel and accessory stores in Carroll County. The number of eating and drinking establishments in Belknap County increased from 131 to 146 between 1992 and 1999, or an increase of 15 places in seven years.

## Number of Establishments with Paid Employees, 1992 and 1999

<b>Eating and Drinking Places</b>			
	<b>1992</b>	<b>1999</b>	<b>Change '92-'99</b>
Belknap County	131	146	+15
Carroll County	141	136	-5
New Hampshire	2,114	2,229	+115
<b>Apparel and Accessory Stores</b>			
	<b>1992</b>	<b>1999</b>	<b>Change '92-'99</b>
Belknap County	46	44	-2
Carroll County	89	57	-32
New Hampshire	860	652	-208
<b>Hotels and Other Lodging Places</b>			
	<b>1992</b>	<b>1999</b>	<b>Change '92-'99</b>
Belknap County	56	59	+3
Carroll County	96	105	+9
New Hampshire	559	547	-12
<b>Amusement and Recreation Services</b>			
	<b>1992</b>	<b>1999</b>	<b>Change '92-'99</b>
Belknap County	33	35	+2
Carroll County	46	38	-8
New Hampshire	489	572	+83

*Source: U.S. Census, County Business Patterns, 1992; 1999 Profile of New Hampshire's Counties, Cities, Towns, and Unincorporated Places, New Hampshire Employment Security, April 2001.*

### **X. Lakes Region Accommodations**

Overnight accommodations for tourists are an integral component of the tourism economy in the Lakes Region. A wide variety of tourist accommodations are offered throughout the Lakes Region, from resorts to tent camping. According to LRPC's most recent telephone survey, 381 B&B/Inns rooms, over 5,500 camp sites, 810 cabins, and 1,778 rooms are available in the Lakes Region.

The following table illustrates the variety and location of the overnight accommodations for tourists. The "Other" classification is typically efficiency apartments and other similar accommodations.

## A. Lodging

The following table should be viewed as an indicator of lodging rather than an actual count. Several establishments were unavailable during the timeframe the survey was conducted.

### Lakes Region Accommodations, 2001

Municipality	B&B/Inns (Rooms)	Camp Sites	Cottages/ Cabins	Hotel/Motel (Rooms)	Other	Total
Alexandria	14					14
Alton	23	119	22	28	5	197
Andover	15					15
Ashland	12	50	20	59		141
Barnstead	4	101				105
Belmont		374				374
Bridgewater	24			30		54
Bristol	31			3	3	37
Brookfield						
Center Harbor			7	61		68
Ossipee	5	765	6	34		810
Danbury	13					13
Effingham	8	280		8		296
Franklin	28	179		20	4	231
Freedom	4	816				820
Gilford	18	315	42	359		734
Gilmanton						
Hebron						
Hill	3					3
Holderness	16	115	58	66	7	262
Laconia	12	517	452	705	12	1698
Meredith	21	427	45	91		584
Moultonborough		455	16	62	2	535
New Hampton		317	7	6		330
Northfield						
Sanbornton	7		6			13
Sandwich						
Tamworth	68	485		41		594
Tilton	13	80	58	95	15	261
Tuftonboro			29	6	20	55
Wolfeboro	44	140	42	164		390
<b>Total</b>	<b>381</b>	<b>5535</b>	<b>810</b>	<b>1778</b>	<b>68</b>	<b>8572</b>

Source: Verizon Yellow Pages and 2001 LRPC Telephone Survey

## B. Major Banquet and Exhibition Facilities

The Lakes Region offers tourists a range of restaurants. While most of the dining is casual, there are restaurants that cater to every style and cuisine. In addition, the Lakes Region is home to many major banquet facilities for individuals and businesses. Banquets and dinners can be arranged for 100 to over 1,200. During the summer and fall, the Mount Washington Cruises can arrange a day or an evening dinner on Lake Winnepesaukee for 1,250 people.

A new exposition center opened in Laconia in 1999. The Winnepesaukee Exposition Center can accommodate 600 people for dinner, hold meetings for 500 people, and has the ability to house 86 8x10 foot exhibition booths. In 1999 there were 4 events at the Center. In 2001, there were 38 events. The following illustrates some of the major facilities in the Lakes Region:

### Lakes Region Major Banquet and Exhibition Facilities

<b>Municipality</b>	<b>Facility</b>	<b>Capacity</b>
Gilford	Gunstock	500 for dinner
	Meadowbrook Farm Gunstock Inn	170 for dinner Outside tent holds 700 Theatre holds 3000
Laconia	Contigianti's (Pheasant Ridge) NASWA Resort	350-400 for dinner
	Laconia Country Club	270 for dinner
	Margate Resort	300 for dinner 180 for meeting 400 theatre style
	Mount Washington Cruises	555 for dinner 1,250 full capacity
	Winnepesaukee Exposition Center	600 for dinner 500 and 400 for meetings 86 (8x10) booths 1999 – 4 Events 2000 – 12 Events 2001 – 38 Events <i>proj. 2002 – 50-60 Events</i>
	Belknap Mill	150 for dinner
Meredith	Hart's Turkey Farm	160 for dinner
	Inns at Mill Falls	140 for dinner 150 for meeting (Flagship Room)
Moultonboro	Castle in the Clouds	175 for dinner
	Kona Masion Inn	150 for dinner
Ossipee	Lake Ossipee Conference Center	500 for dinner
Sanbornton	Steele Hill Resorts	250 for dinner 200 for meeting Break-out rooms available
Tilton	Lochmere Golf and Country Club	170 for dinner
Wolfboro	Lakeview Inn	250 for dinner
	Wolfboro Inn	165 for dinner

### C. Seasonal Housing – Number of Units

Between 1980 and 1990, the Lakes Region experienced a tremendous increase in the number of seasonal housing units. According to the *Lakes Region Demographic Study*, published in 1993 and based on the U.S. Census, the amount of seasonal housing increased 5.8% between 1980 and 1990, and accounted for nearly 35% of all housing units in the Region in 1990.

Between 1990 and 2000, the number of all housing units increased 3% from 60,864 to 62,690. During that same time, the number of seasonal housing units decreased 8.5% from 20,976 to 19,195. This decrease is probably the result of seasonal home conversions to year-round housing.

As reported in 1995, seasonal home conversion is an issue that is sure to continue to impact municipalities throughout the Lakes Region, especially those with lakefront areas, due to the overall aging of the U.S. population. As more seasonal residents approach retirement age, many homes that in the past have been used only during the summer months will likely be converted to year-round retirement homes.

County	Municipality	All Units			Seasonal Units		
		1980	1990	2000	1980	1990	2000
Belknap	Alton	2,570	3,267	3,522	1,560	1,834	1,610
	Barnstead	1,399	1,861	1,994	501	679	528
	Belmont	1,988	2,869	3,113	492	525	351
	Center Harbor	501	649	653	89	239	208
	Gilford	3,026	4,397	4,312	1,189	1,833	1,427
	Gilmanton	1,440	1,744	1,848	685	752	648
	Laconia	6,801	8,201	8,554	608	1,216	1,477
	Meredith	3,184	3,720	4,191	1,322	1,603	1,611
	New Hampton	622	855	944	146	182	180
	Sanbornton	997	1,131	1,359	285	311	343
Carroll	Tilton	1,476	1,612	1,631	129	145	186
	Brookfield	207	274	280	54	66	34
	Effingham	550	682	791	46	287	260
	Freedom	812	1,359	1,406	304	890	771
	Moultonborough	2,853	3,850	4,523	1,878	2,526	2,519
	Ossipee	1,826	2,617	2,742	531	1,069	920
	Sandwich	722	864	965	314	352	360
	Tamworth	1,136	1,523	1,662	379	524	526
	Tuftonboro	1,273	2,027	2,019	545	1,236	1,043
Wolfeboro	2,686	3,631	3,903	793	1,345	1,194	

County	Municipality	All Units			Seasonal Units		
		1980	1990	2000	1980	1990	2000
Grafton	Alexandria	427	721	783	146	245	260
	Ashland	908	1,162	1,149	94	292	249
	Bridgewater	594	839	850	323	472	420
	Bristol	1,747	2,250	2,073	721	1,086	772
	Hebron	415	452	517	228	267	294
	Holderness	968	1,136	1,208	263	417	404
Merrimack	Andover	771	855	1,038	154	123	176
	Danbury	439	541	596	146	166	121
	Franklin	3,255	3,744	3,676	181	191	215
	Hill	320	360	436	58	48	47
	Northfield	1,135	1,671	1,782	37	65	41
Lakes Region		47,048	60,864	62,690	14,201	20,976	19,195
Counties	Belknap	24,004	30,306	32,121	7,006	9,319	8,569
	Carroll*	12,065	16,827	18,291	4,844	8,295	7,627
	Grafton*	5,059	6,560	6,580	1,775	2,779	2,399
	Merrimack*	5,920	7,171	7,528	576	593	600
New Hampshire		386,381	503,904	547,024	37,166	57,135	56,413

\* Total reflects Lakes Region portion of county

Source: 1980, 1990, 2000 U.S. Census

### D. Seasonal Housing – Percent Seasonal and 1990-2000 Changes

County	Municipality	Percent Seasonal			Percent Change 1990-2000
		1980	1990	2000	
Belknap	Alton	60.7%	56.1%	45.7%	-12.2%
	Barnstead	35.8%	36.5%	26.5%	-22.2%
	Belmont	24.7%	18.3%	11.3%	-33.1%
	Center Harbor	17.8%	36.8%	31.9%	-13.0%
	Gilford	39.3%	41.7%	33.1%	-22.1%
	Gilmanton	47.6%	43.1%	35.1%	-13.8%
	Laconia	8.9%	14.8%	17.3%	21.5%
	Meredith	41.5%	43.1%	38.4%	0.5%
	New Hampton	23.5%	21.3%	19.1%	-1.1%
	Sanbornton	28.6%	27.5%	25.2%	10.3%
Carroll	Tilton	8.7%	9.0%	11.4%	28.3%
	Brookfield	26.1%	24.1%	12.1%	-48.5%
	Effingham	8.4%	42.1%	32.9%	-9.4%
	Freedom	37.4%	65.5%	54.8%	-13.4%
	Moultonborough	65.8%	65.6%	55.7%	-0.3%
	Ossipee	29.1%	40.8%	33.6%	-13.9%
	Sandwich	43.5%	40.7%	37.3%	2.3%
	Tamworth	33.4%	34.4%	31.6%	0.4%
	Tuftonboro	42.8%	61.0%	51.7%	-15.6%
	Wolfeboro	29.5%	37.0%	30.6%	-11.2%
Grafton	Alexandria	34.2%	34.0%	33.2%	6.1%
	Ashland	10.4%	25.1%	21.7%	-14.7%
	Bridgewater	54.4%	56.3%	49.4%	-11.0%
	Bristol	41.3%	48.3%	37.2%	-28.9%
	Hebron	54.9%	59.1%	56.9%	10.1%
	Holderness	27.2%	36.7%	33.4%	-3.1%
Merrimack	Andover	20.0%	14.4%	10.0%	43.1%
	Danbury	33.3%	30.7%	20.3%	-27.1%
	Franklin	5.6%	5.1%	5.8%	12.6%
	Hill	18.1%	13.3%	10.8%	-2.1%
	Northfield	3.3%	3.9%	2.3%	-36.9%
Lakes Region Counties		30.2%	34.5%	30.0%	-8.5%
New Hampshire	Belknap	29.2%	30.7%	26.7%	-8.0%
	Carroll*	40.1%	49.3%	41.7%	-8.1%
	Grafton*	35.1%	42.4%	36.5%	-13.7%
	Merrimack*	9.7%	8.1%	8.0%	2.9%
New Hampshire		9.6%	11.3%	10.3%	-1.3%

\* Total reflects Lakes Region portion of county

Source: 1980, 1990, 2000 U.S. Census

## **XI. Traffic Patterns**

Historically, tourist attractions have become significant only to the extent that they become accessible. The Lakes Region has an excellent and extensive highway network. Two major roads, I-93 and NH16, provide primary access to Boston, New York, and Montreal. Tourists can travel from Boston to the Lakes Region in two hours; from New York or Montreal in five hours. Access from Vermont is provided via NH11 and I-89. In addition, NH106 provides the most direct route into the central Lakes Region from Concord.

Average annual daily traffic varies from more than twenty thousand vehicles per day on Interstate 93 to below 100 vehicles per day on many local roads. Traffic levels are seasonal, with summer traffic on some routes being more than double the mid-winter traffic levels. Traffic levels are not only seasonal, but influenced by holidays and special events. For example, in 2001, the State of New Hampshire Department of Transportation reported that more motorists took to the highway on Thanksgiving Day than any previous year. The new Thanksgiving Day traffic record of 228,337 vehicles surpassed the year 2000 record of 211,294. The Winston Cup Race at the NH International Speedway on the day after Thanksgiving contributed to the increase in traffic on the highway system.

The average annual daily traffic data for selected routes in the Lakes Region indicate the variations that occur. With the exception of a slight decrease in 1991, these selected routes have experienced increased traffic volume every year.

**Selected Rural State Average Traffic Counts 1989-2000**

	<b>Alton</b>	<b>Andover</b>	<b>Belmont</b>	<b>Boscawen</b>	<b>Gilford</b>	<b>Meredith</b>	<b>Meredith</b>	<b>Ossipee</b>	<b>Tamworth</b>	<b>Tilton</b>	<b>Total</b>	<b>Percent Change</b>
	<b>NH 11</b>	<b>US 4 and NH 11</b>	<b>NH 106</b>	<b>US 3</b>	<b>US 3 and NH 11</b>	<b>I-93</b>	<b>NH 104</b>	<b>NH 16</b>	<b>NH 25 and NH 113</b>	<b>I-93</b>		
<b>1989</b>	4,503	4,152	9,628	4,358	7,225	16,645	9,233	9,749	4,598	18,621	88,712	
<b>1990</b>	4,412	4,336	9,436	4,188	7,418	16,223	9,147	9,881	4,465	19,383	88,889	.20%
<b>1991</b>	4,103	4,357	9,368	4,237	7,987	15,889	9,214	9,721	4,124	19,544	88,544	-.39%
<b>1992</b>	4,038	4,319	9,836	4,385	7,932	16,221	9,378	9,410	4,470	19,115	89,104	.63%
<b>1993</b>	4,470	4,651	9,941	4,385	7,800	16,687	9,580	9,904	4,436	19,273	91,127	2.27%
<b>1994</b>	4,433	4,618	10,254	4,415	8,304	18,401	9,980	10,016	4,615	20,606	95,642	4.95%
<b>1995</b>	4,949	4,765	10,762	4,722	8,417	15,762	10,327	10,168	4,707	21,606	96,185	.57%
<b>1996</b>	4,694	4,752	10,900	4,576	8,443	19,005	10,620	10,287	4,778	22,151	100,206	4.18%
<b>1997</b>	4,694	4,870	10,975	4,673	7,690	20,028	10,786	10,640	4,936	23,426	102,718	2.51%
<b>1998</b>	4,919	4,989	11,625	4,649	8,410	20,969	11,308	11,168	4,996	24,221	107,254	4.42%
<b>1999</b>	4,988	4,955	12,083	4,974	8,662	21,790	11,450	11,465	5,029	23,998	109,394	2.00%
<b>2000</b>	5,168	4,991	12,063	5,034	8,715	22,207	11,433	11,569	5,079	25,132	111,391	1.83%

**Total Percent Change 1989-2000 Selected Rural State Traffic Counts      23.16%**

Note: These traffic counts represent selected Rural State Averages and can be incomplete.

Source: New Hampshire Department of Transportation

## **XII. Public Transportation**

In addition to single vehicle traffic, some areas of the Lakes Region enjoy a public transit system. The Greater Laconia Transit Agency (GLTA) was incorporated in 1994 as part of the Lakes Region Community Services Council. GLTA serves over 30 towns and cities in Belknap, Southern Grafton and Merrimack counties. In 2000, GLTA provided over 125,000 rides, an increase of 25% over 1999. GLTA operates over 40 vehicles, including trolleys, small buses and a larger bus. Most of the vehicles are wheelchair lift equipped.

GLTA offers daily routes in downtown Laconia and connecting routes from Plymouth and Franklin as well as shuttle service to Manchester Airport, and a summer trolley route from Weirs Beach to Meredith.

In addition, Molly-the-Trolley offers seasonal public transportation around Wolfeboro, with special excursions around Lake Winnepesaukee in the summer.

## **XIII. Airports**

The Lakes Region is accessible by good highways, and also by air. The Lakes Region is home to four airports: Laconia Airport (Gilford), Lakes Region Airport (Wolfeboro), Newfound Valley Airport (Bristol) and Moultonborough Airport (Moultonborough). Laconia Airport, the largest of the region's airports, is a general aviation facility which has two full-service Fixed-Based Operators (FBOs), a global positioning system, and a state of the arts instrument landing system. There are plans to extend the Laconia Airport runway and add a second runway. Due to the proximity of Laconia Airport to the large seasonal homes on Lake Winnepesaukee, many corporate and business aircraft operators use the airport to shuttle clients and families into and out of the area. In addition, the racing teams for the New Hampshire International Speedway located in Loudon, New Hampshire often use the Laconia Airport. Moultonborough Airport is a small general aviation facility used primarily by recreational operators. Lakes Region Airport is a general aviation facility that offers a 2,500 asphalt runway. Newfound Valley Airport is a small seasonal airstrip with only three based aircraft.

### **Airport Facilities in the Lakes Region**

Name	Ownership	Location	Number of Runways	Surface Type	Runway Length (feet)
Laconia	Public	Gilford	1	Asphalt	5,286
Lakes Region	Private	Wolfeboro	2	Asphalt	2,540
Newfound Valley	Private	Bristol	1	Asphalt	1,800
Moultonborough	Private	Moultonborough	1	Asphalt	3,625

Source: *Federal Aviation Administration and RKG Associates, Inc., 2001*

## **XIV. Planning For The Future**

Many of the plans for the future of tourism, as reported in 1995, remain relevant in 2002. As stated in the 1994 *Overall Economic Development Program* (OEDP) for the Lakes Region, a major goal is to:

“Promote development of a balanced and diverse regional economy that wisely uses the region’s natural, man-made and human resources while respecting the limitations of the environment.”

One of the six OEDP objectives is to “Revitalize the region’s existing commercial recreation activities and encourage wise and effective promotion of the region as a year-round recreation spot.”

Today, the goal and the objective remain germane.

The following sections will briefly examine and update the promotion of the region, discuss areas of concern, and future strategies for improvement.

### **A. Tourism Promotion in the Lakes Region**

Major factors in Lakes Region tourism include the size and attractiveness of area water bodies, especially the larger lakes: Lake Winnepesaukee, Squam Lake, and Lake Winnisquam. Marinas, boating, fishing and excursion boat rides remain key tourists interests.

The natural and historic features have also continued to attract visitors from within New Hampshire and from out-of-state. Hiking, amusements, special events, winter sports, and shopping are also available. Promoting these factors remain a high priority.

Some of the notable achievements since the *1995 Lakes Region Tourism Profile* was published that have enhanced tourism promotion in the Lakes Region include the Governor’s trips to Europe, including Germany, Denmark, the United Kingdom and Ireland, the opening of the Winnepesaukee Exposition Center in Laconia that has attracted new events, and the Yuletide at the Lakes.

Yuletide at the Lakes was originated in 2000 by the Belknap County Economic Development Council. Today, it is a collaborative promotional program under the Lakes Region Association and sponsored by area media, businesses and attractions. They promote winter activities in the Lakes Region including lodgings, dining, and shopping with a calendar of seasonal/holiday events which include fairs, workshops, exhibits, concerts and sleigh rides. The calendar is distributed through the media and promoted through advertisements, out-of-state mailings and the Lakes Region Association’s website.

The natural and historic resources in the Lakes Region continue to be an attraction. In the recent years, a statewide program called Land and Community Heritage Investment Program (LCHIP), has been funded by the state to protect and preserve natural, cultural, and historic resources. Many Lakes Region communities have taken advantage of this program to restore and protect natural and historic resources that are valued by the tourism industry as attractions.

During the first year of LCHIP's grants, six of the Lakes Region's communities/organizations received monies including:

- Town of Andover
- Tri-County CAP (Ashland)
- The Nature Conservancy (Freedom)
- Belknap Mill Society (Laconia)
- Town of Tamworth
- Town of Tuftonboro

As in 1995, the Lakes Region's natural and historic resources need to be protected, restored, and promoted. The continued success of the Lakes Region as a popular vacation destination depends in large part on retaining features that have attracted people for generations.

Other notable achievements since the 1995 *Lakes Region Tourism Profile* include the Lakes Region Heritage Roundtable development of *The Lake Winnepesaukee Heritage Route: A Guide to exploring the history and heritage of Lake Winnepesaukee and surrounding towns*. In addition to this guide, a number of community groups have formed to promote local interests, for example, the Weirs Improvement Committee, the Trails Rails Action Committee (Wolfeboro), the Laconia River Walk, Meredith Main Street and Tilton Main Street.

Since 1995 a number of developments have also increased the tourism capacity in the Lakes Region. Meredith has opened two more inns with conference space as well as restaurants. The Winnepesaukee Exposition Center opened phase one which accommodates meetings up to 500, with a future capacity of 185,000 square feet for events. Gunstock Recreational area owned by Belknap County has continued to reinvest in its facility to enhance four seasons of activities. The Barnstormer Theatre in Tamworth has grown its summer theatre and the New Hampshire Music Festival recently purchased the Red Hill Inn in Center Harbor and is planning to construct a world-class concert hall. They will utilize the existing Inn to provide accommodations to visiting musicians. The New Hampshire International Speedway (NHIS) has also extended its season from May through September and can seat over 100,000 in the grandstand. In Tilton, there is an effort to develop 87 acres into a film studio.

In addition, the Lakes Region Association promotes tourism through its annual publications *Where To Guide* and *Lakes Region Mapping Guide*. The newest campaign includes a media kit on a CD-ROM that targets travel writers. Finally, the Chambers of Commerce in the Lakes Region produce their own annual and seasonal materials promoting specific areas.

The growing interest nationwide in outdoor activities is an additional opportunity for the Lakes Region to promote tourism. Rafting, kayaking, biking, wildlife observation, hiking, and camping are abundant in the Lakes Region.

## **B. Areas of Concern**

There were three areas of concern highlighted in the earlier *Lakes Region Tourism Profile*: seasonality, water quality, and public access to lakes, ponds, streams and mountains. Today, those concerns are still relevant. In addition, increased traffic in the Lakes Region may be an additional concern.

## 1. Seasonality

For most commercial recreation establishments the tourism season is from May through October.

As reported earlier, this short season generates another problem. Most establishments require continuing reinvestments. Given the limited season, the income base for many of the older facilities is inadequate to support reinvestment in accommodations or attractions. To understand the dilemma facing seasonal businesses, couple a limited earning season with the increased value of waterfront property assessments and local real estate to taxes. Establishments with waterfront access are always under pressure from developers of private homes and/or vacation properties.

The seasonality issue can be exacerbated by the economy, employment and housing issues. When the economy is on an upswing, it is difficult for local establishments to recruit and keep seasonal employees. For example, many establishments hire foreign employees that translate into transportation and housing issues. The lack of affordable housing also makes hiring difficult for employers that offer minimum wage.

To overcome seasonality and increase the income generated through tourism the following opportunities need to be collaboratively explored/addressed by the various stakeholders:

- A regional public/private partnership to promote four season tourism.
- The development of additional Heritage Tourism initiatives by coordinating local historic and community groups promoting historic buildings, tours, and Old Home Day activities.
- Encourage local and regional support for the Winnepesaukee Exposition Center and other smaller conference venues which provide complimentary events during peak season and create new activities which enhance the slower or off-season.
- Coordinate the training of front-line staff on customer service and what is available in the area.
- Establish ambassador- style training for tourism employees with incentives for participation.
- Develop employee-leasing cooperative for seasonal employees to enhance wages, benefits, career paths, and seasonal housing.
- Facilitate the promotion of NH's Scenic By-Ways Initiative.
- Develop new year-round eco-tourism opportunities by working with farmers, foresters, etc.
- Develop strategy to support tradition village stores as essential centers of villages.
- Explore traditional and nontraditional lenders for reinvestment into the tourism economy and facilities.
- Develop and promote more joint ventures such as Yuletide at the Lakes.
- Explore partnerships to improve housing for temporary seasonal workers.
- Educate municipalities on the use of Tax Increment Finance Districts for attracting investment to downtowns and tourism corridors.

## 2. Water Quality

New Hampshire's lakes, rivers and streams are important natural resources, vital to wildlife, fisheries, recreation and tourism. The care of the state's waters is a high state and regional priority.

Water quality as a tourism issue includes the shorelands around the water. With the exception of Big Squam Lake, much of the buildable lake frontage continues to be developed. Many houses that were summer camps have been converted to year-round housing. This kind of development can impact not only the quality of the water, but the access to the natural resources and open land around the lakes.

With funding support from the NH Department of Environmental Services, the Lakes Region Planning Commission initiated its Nonpoint Education for Municipal Officials (NEMO) training program. NEMO encourages local and regional collaboration to identify at what point local land use trends might overtake the land's natural ability to accommodate development, leading to increased levels of water pollution and environmental degradation due to such causes as increased stormwater runoff from impervious surfaces with inadequate stormwater management systems and sediment inputs from construction.

Communities are encouraged to learn more about innovative land use approaches and water quality enhancement options, which may include:

- Preserve natural shoreland buffers when developing waterfront parcels as a means to conserve water quality.
- Encourage the use of Best Management Practices (BMP's) for stormwater management, to control erosion at road construction sites, for site excavation and development, and other activities that can generate nonpoint source pollution and negatively impact water quality.
- Improve local land use regulations, including zoning ordinances, subdivision regulations, and site plan review regulations, to protect water quality and ecosystem integrity.

### 3. Public Access

As in 1995, public access to many lakes, ponds, streams, and mountains remains an issue for both residents and visitors. As reported earlier, in the past gaining access in the region posed relatively few problems to those interested in using these resources for recreational purposes. The land was held mostly in large parcels and there was often a tacit understanding that private property could be used by the public as long as the privilege was not abused.

The development of second homes, subdivisions, and commercial development have resulted in increased fragmentation of large tracts of land. Private property rights have sharply limited public access to many of the recreational resources.

To promote the need for public access to the Lakes Region's natural resources, the following are potential endeavors:

- Educate people on the value of open-space and the cost of stewardship
- Support the work of organizations such as Lakes Region Conservation Trust, Society for the Protection of NH Forests, NH Audubon Society, Loon Preservation Society.
- Promote the need to put land in conservation.
- Work with the Statewide Trails Advisory Committee to develop and better promote a regional trails network in partnership with private landowners and communities.

#### 4. Increased Traffic

Increased visitors means more traffic throughout the Lakes Region. Increased traffic generates pollution (air and noise) as well as congestion which decreases the attractiveness for both visitors and residents. While the Lakes Region has major roads and highways that move traffic relatively well, most of the roads used by tourists are two-lane local roads. Along with the need to develop passive tourism that is appealing to the visitor and minimizes environmental impacts, there is a growing need to develop pedestrian-friendly communities. Ways to develop such communities include:

- Support a collaborative partnership between DOT, OSP, and the municipalities for the development and improvement of bike routes along major and minor roads that offer a safe ride between points of interest.
- Encourage pedestrian-friendly communities, which promote walking tours in the Lakes Region.
- Support the initiatives of GLTA and other public transit providers in the provision of additional bus and trolley routes that accommodate both visitors and residents.
- Develop viable transportation options such as trolleys and trains.
- Promote the use of the Transportation Enhancements Program to help fund pedestrian and human-powered transportation.
- Continue to monitor traffic patterns and work with the NH Department of Transportation regarding the state's transportation plan.
- Assist leadership in local municipalities (select boards, planning boards, and public works/highway departments) to access new methodologies of road planning and traffic calming.

### **C. Defining and Measuring Tourism in the Lakes Region**

As in 1995, this profile attempted to focus on existing data sources that could be used to summarize tourism in the Lakes Region. The data are difficult to find and in many cases, data that existed in the past do not exist today. Comparisons have been difficult to make. We need more specific data that tell us: where tourists are coming from when they visit the Lakes Region, their demographic characteristics, and how they spend their money. We have made educated guesses and calculated reasonable estimates for this report.

As a final recommendation, a concerted effort should be made to develop a list of data needs to assess tourism in the state and in the Lakes Region. The development of surveys should be complete and on-going.

It is also recognized that data pertinent to the tourism and economic development community is not readily accessible. For example, occupancy rates and number of rooms by season, and rooms and meals taxes by towns are just examples of data needed in the future.

The development of a tourism research program in the Lakes Region, that would coordinate with Dr. Mark Okrant of the Institute for New Hampshire Studies, is an essential part of understanding and reporting tourism. Concerns for economic development and the tourism industry would benefit greatly by having access to complete, reliable data.