

APPENDIX G

Existing Conditions: Economic Performance of Hospitality and Tourism in Freedom's Way National Heritage Area

G.1 Introduction

There are two ways to examine the economic performance of tourism in the Freedom's Way National Heritage Area using current, readily available data. First, we can look at what the states can tell us about tourism spending in the heritage area. And second, we can explore what we can know about business establishments engaged in the hospitality industry. This report is designed to offer what information is readily available at this time. First, however, let's examine the larger picture.

In both states, tourism is big business. Boston is a popular national and international market. New England is the nation's sixth most popular destination for international travelers, Massachusetts is the top state in that region, and Boston receives most of that visitation. New Hampshire prospers from its ski industry and summer visitors and is more reliant than most states on tourism revenues:

Travel and tourism spending in New Hampshire in comparison with traveler spending nationally is more than three times as large as the state's share of the national population. Travel and tourism was the second largest export sector in terms of employment size....Travel and tourism spending supports more employment per dollar of receipts than any other economic sector. It is also one of the largest sources of revenue to the state government. If second homes are included as tourism related, then travel and tourism related properties are one of the larger sources of property tax payments to local governments. (NHDTTD 2012 report, p. 3)

Massachusetts also relies on tourism as a significant part of its economy:

The most impressive contribution that travel and tourism makes to the Massachusetts economy is the number of businesses and jobs it supports. These jobs include a large number of executive and managerial positions as well as service-oriented occupations. Domestic and international traveler spending in Massachusetts directly generated 126,500 jobs, up 1.4 percent from 2011....These travel-generated jobs comprised 3.9 percent of total non-agricultural employment in Massachusetts during 2012. Without these jobs generated by travel, Massachusetts's 2012 unemployment rate of 6.7 percent would have been 3.6 percentage points higher, increasing it to 10.4 percent. (MOTT 2012 report, p. 18)

An indicator of tourism's importance to the state is tax receipts. Travel-generated tax revenue is a significant economic benefit, as governments use these funds for travel support programs and help support a variety of public programs. In 2012, domestic and international traveler spending in Massachusetts generated nearly \$2.6 billion in tax revenue for federal, state, and local governments, up 4.0 percent from 2011. The breakdown for Massachusetts is shown in Table G-1.

While New Hampshire's report is not directly comparable, it contains this statement as an indicator of why tourism is important to that state:

The largest single source of traveler spending which becomes State government revenues is the rooms and meals tax. It is estimated that \$150 million resulted from traveler spending, up from \$132 million in FY 2010. This is 62 percent of all rooms and meals tax revenues collected in FY 2012, with the other 38 percent from resident non-tourist spending on meals. Total State government revenues from fees and taxes paid by travelers are estimated at \$390 million for FY 2012 up from \$378 million in FY 2010. During the same period, the state's general and

educational funds (the state’s primary operating funds) declined by 2%. (NHDTTD 2012 report, p. 3)

Table G-1 Travel-Generated Tax Revenue in Massachusetts, 2012

Distribution	Overall Collections	Domestic	International
Traveler tax payments	\$2.6 billion	\$2.2 billion	\$347.5 million
Federal tax receipts	57.1% (almost \$1.5 billion)		
State tax receipts	26.3% (\$676.4 million)		
Local tax receipts	16.6% (\$428 million)		
Source: <i>The Economic Impact Of Travel on Massachusetts Counties 2012: A Study Prepared for the Massachusetts Office of Travel and Tourism by the Research Department of the U.S. Travel Association, Washington, DC, September 2013, p. 21; chart by Heritage Strategies, LLC, November 2014</i>			

G.2 Tourism Data Sources

There are two main sources of data about tourism in the Freedom’s Way National Heritage Area. First, both New Hampshire and Massachusetts issue periodic reports on the economic impact of travel. The Massachusetts Office of Travel and Tourism’s recent annual studies have been undertaken by the Research Department of the U.S. Travel Association, a nonprofit based in Washington, DC, which does many such studies for states around the nation. The most recent year for which Massachusetts data are available as this report was written, in November 2014, was 2012, and the data are available at the county level. (Freedom’s Way combines portions of three counties in two states.) (This report is referred to throughout as “MOTT 2012 report”; it is available at <http://www.massvacation.com/travel-trade/stats-facts/stats-reports/>.)

Studies for the New Hampshire Division of Travel and Tourism are undertaken by the Institute for New Hampshire Studies at Plymouth State University of the University System of New Hampshire. Compared to the Massachusetts information, the institute provides more detailed information, more frequently, and in more real-time measures, including visitor counts (not just spending; counts are more difficult data to derive or obtain). The economic impact study, however, is biennial, also available only up to 2012, and reports most data on a county level. It also reports some data on a regional basis – a good sign, as perhaps the institute would be willing to adapt its methodology to reporting the New Hampshire portion of the heritage area, and perhaps also the MA portion). (This report is referred to throughout as “NHDTTD 2012 report”; along with the quarterly barometer reports mentioned below it is available at <https://www.plymouth.edu/institute-for-new-hampshire-studies/nh-tourism-data/>.)

The second source of data is on tourism-based businesses, including the number and kind of establishments, payroll, and employment, collected by the U.S. Census. While most data are provided by county, the Census’s ZIP Code Business Pattern and County Business Pattern data enable us to examine patterns of basic hospitality infrastructure in the 45 cities and towns of Freedom’s Way.

The studies of tourism’s economic impacts sponsored by both states are more sophisticated than a simple look at business patterns, although the New Hampshire reports make interesting use of the Census’s business pattern data. The state’s tourism reports measure economic impacts that include (1) direct spending (what travelers spend, accounting for businesses that serve both visitors and residents); (2) the multiplication of that spending as it flows through local economies, indirect spending (what the businesses spend, again, accounting for proportions stimulated by visitors and residents); and (3) induced spending (what employees spend and stimulate, again, with the understanding that the proportion of pay to employees caused by visitor spending is what must be

measured). New Hampshire calculated that in 2012, for every dollar directly spent by a traveler, an additional \$2.13 circulated through the economy (NHDTTD report 2012, p. 11).

Business pattern data used in this analysis examined only the North American Industry Classification System for “Arts, entertainment, and recreation” (code 71) and “Accommodation and food services” (72), those businesses most directly involved in tourism (combined, they are called “Leisure and hospitality”). Where the two kinds of analyses overlap, in employment and payroll, there is a significant difference in the numbers reported. This is because of the calibration in the impact studies to account for the involvement of other businesses in tourism that are not primarily tourism businesses (such things as accountants and lumber supply, for example) and impacts of resident versus visitor spending.

G.3 What the Tourism Impact Reports Tell Us about the Potential for Cultural Heritage Tourism in Freedom’s Way

Because of tourism’s significant contribution to their economies, both states watch their tourism industries intently, promoting travel to their states in many ways.

The two states are markedly different in their scale of tourism. During 2012, domestic and international travelers in Massachusetts directly spent \$17.7 billion on transportation, lodging, food, entertainment and recreation, and retail shopping. New Hampshire saw \$4.42 billion in the same year.

The following two sections excerpts key information found in both states’ tourism impact summary reports available annually (Massachusetts) and biennially (New Hampshire). Most recent data available for both states are from 2012.

G.3.1 Position of Tourism in Middlesex and Worcester Counties in Massachusetts

As discussed above, the annual report by the Massachusetts Office of Travel and Tourism gives an overall picture of the travel and tourism industry in Massachusetts. Our interest here is to extract information about the position of the two Freedom’s Way counties to see how they are performing in relation to the rest of the state.

In Massachusetts, in terms of domestic travel spending, the six top-ranked Massachusetts counties in 2012 included the two Freedom’s Way counties, Middlesex and Worcester, ranked 2nd and 6th respectively. With Suffolk (Boston, 1st), Norfolk (3rd), Barnstable (Cape Cod, 4th), and Essex (a National Heritage Area, 5th), these six counties shared 85 percent of the state’s travel expenditures. Payroll, employment, and state and local taxes related to tourism were 85.4, 84.7, 81.4, and 81.5 percent respectively.

In 2012 Middlesex County received a 14.7 percent share of the state’s total travel expenditures of \$15.4 billion, nearly \$2.3 billion. Payroll income and jobs directly attributable to domestic travel spending in the county totaled \$579.5 million and 19,800 jobs. Similarly, Worcester County, which ranked sixth, had a 5 percent share of the state’s total, or more than \$771 million in domestic travel spending. Payroll income and jobs directly attributable to domestic travel spending totaled \$145 million and 5,300 jobs. Unfortunately, it is not possible with currently available data to split these numbers between FWNHA and non-FWNHA sections of the counties (also true of Hillsborough County, NH).

G.3.2 Position of Tourism in Hillsborough County in New Hampshire

In New Hampshire in 2012, Hillsborough County received a 23.9 percent share of rooms and meals sales to travelers, the only breakout of numbers associated with counties (the regional breakdown predominates), totaling \$1.66 billion across the state and \$397 million in Hillsborough County. The

county experienced the second highest sales, after Rockingham County, 26.2 percent, and before Grafton, 12 percent. (*Travel Barometer, Spring 2014*, Institute for New Hampshire Studies, Plymouth State University, p. 5; henceforth cited as “NHDTTD barometer Spring 2014.”)

As for that \$4.42 billion in tourism expenditures overall mentioned above, the top-ranked Merrimack Valley region, of which all but one of the Freedom’s Way towns are a part, receives 30 percent, \$1.32 billion. Closely following are the White Mountains (25.1) and the Seacoast (20.9). The Monadnock region (including one Freedom’s Way town, New Ipswich) receives 5.8 percent, or \$246 million. (NHDTTD report 2012, p. 4)

G.4 What Can We Know about the Extent of Tourism in Freedom’s Way Based on Industry Census Data?

While tourism spending data and analysis in the two states’ reports provide important numbers for those involved in tourism to publicize, where we are headed in this report is to gain an idea of the share of the local economy occupied by hospitality in the Freedom’s Way National Heritage Area. This is somewhat more difficult than consulting the two states’ annual tourism reports.

To the extent that these reports provide county-level data (and as we have seen, this is not done in New Hampshire to any appreciable degree), it might be possible to attempt to extrapolate on the basis of population. Since this is a good place to start, anyway, let’s look at possible implications of population distribution.

G.4.1 Population Distribution in the Three Freedom’s Way Counties

In all three counties, the regions served by the heritage area are, generally speaking, more rural than urban. The exceptions are the urban corridor in Middlesex County, MA, running west from Woburn to Lexington and from Malden through Medford and Arlington, again westward to Lexington; Nashua, NH; and the Fitchburg-Leominster area of Worcester County, MA (see demographics and land use/land cover maps in Appendix C).

Middlesex County’s share of the heritage area includes 44 percent of its municipalities (24 out of 54 cities and towns) and 46.2 percent of its land area but only 29.2 percent of its population. The thirty towns outside the heritage area possess the lion’s share of the population, nearly 71 percent. (For these numbers and others discussed in the following paragraphs, see Table G-2.) Since those areas are closer to Boston, such a denser population is expected. The population density of the heritage area is lower than the rest of the county, therefore – does it have a correspondingly lower portion of the economic activity?¹ That is, does the hospitality infrastructure divide this way as well?

Worcester is slightly differently situated with regard to population, local government, and land area: 22.5 percent of its population is found in the heritage area, 22 percent of local governments (13 of 60 cities and towns), and 24.2 percent of its land area. The Middlesex County portion of the heritage area is outside Boston; similarly, though at a different scale, the portion of Worcester County in the heritage area is outside its county seat, Worcester.

In New Hampshire, the section of Hillsborough County that is included in Freedom’s Way includes the state’s second largest city, Nashua (pop. 86,494, about 20,000 fewer than Manchester). Here, the

¹ Ignoring income patterns, which are distorted for our purposes by commuting patterns – high median incomes in the outer, low-population suburban communities, that is, are assumed to be derived at least in part from jobs held in Boston and inner-ring suburbs and most definitely can skew analysis of and actual economic activity in that part of Massachusetts. (See demographic maps in Appendix C.)

analysis might have reversed – is this part of the heritage area more urban than rural? – but again, the heritage area portion of Hillsborough is beyond an even larger city, Manchester, also in Hillsborough County. Only 33.5 percent of Hillsborough County’s population is in the heritage area, governed by 26 percent of the county’s local governments (8 of 31 cities and towns) covering 23.3 percent of its land area.

The density of the population in Hillsborough County’s portion of the heritage area is the only one of the three that exceeds the population density of the county as a whole – the effect of the large population of Nashua in such a small land (204 sq. mi. devoted to the heritage area). In the two Massachusetts counties, the urban populations of Fitchburg, Gardner, and Leominster (Worcester, 366 sq. mi.) and the eastern towns (Middlesex, 379 sq. mi.) have considerably more lightly populated land area and towns bringing their population densities down.

Table G-2 Freedom’s Way National Heritage Area’s Share of Population, Local Government, and Land Area in Three Counties

	TOTAL	Middlesex Co, MA	Worcester Co, MA	Hillsborough Co, NH
County Population	2,702,360	1,503,091	798,548	400,721
NHA Population	752,856	439,437	179,348	134,071
NHA Population as % of County’s	27.9%	29.2%	22.5%	33.5%
County Local Gov’ts	145	54	60	31
NHA Local Gov’ts	45	24	13	8
NHA Local Gov’ts as % of County’s	31%	44%	22%	26%
County Land Area (sq. mi.)	3,205	818	1,511	876
NHA Land Area (sq. mi.)	948	379	366	204
NHA Land Area as % of County’s	29.6%	46.3%	24.2%	23.3%
Persons per square mile, County, 2010	843	1838	529	457
Persons per square mile, NHA, 2010	794	1159	490	657

SOURCE: 2010 U.S. Census; 2014 U.S. Gazetteer Files, and Wikipedia; compiled by Heritage Strategies, LLC, November 2014

G.4.2 State Tourism Data for the Three Freedom’s Way Counties

While the population data covered in the preceding section is interesting in its own right, it does not get us very far for our purposes here. The next step is to apply our choice of these proportional figures to the data available from the states’ tourism offices, as seen in Table G-3. This might give us some idea of the possible magnitude of leisure and hospitality businesses, and therefore perhaps tourism, that we might find in the National Heritage Area, if only we were sure of the distribution of leisure and hospitality businesses. (Spoiler: the examination of the distribution of tourism-related businesses described further below tends to bear out the use of population data to estimate this split.)

Table G-3 shows partly reliable data drawn from or calculated from reports provided by reports by the New Hampshire Division of Travel and Tourism Development (NHDTTD) and the Massachusetts Office of Travel and Tourism (MOTT). While the data may not be exactly comparable, they are at least quite close in the way information is gathered and presented. It is only partly reliable because of this, and because the county data for Hillsborough was extrapolated from statewide numbers – similar to the method used to generate the heritage area portions of the data here, but we are unable to validate this by any other approach.

Table G-3 shows that Hillsborough County as a whole is a powerhouse in comparison to its counterparts in Massachusetts. It is the state's second-ranking county in the state's tourism calculations (just after Rockingham and not quite twice the size of the next county down, Grafton). More to the point, although Hillsborough is only a little more than one-quarter the population of Middlesex County, MA (a much larger tourism generator, ranked second after Boston in a much larger state tourism-wise, nearly four times that of New Hampshire), its travel expenditures approach three-quarters of those in Middlesex. By comparison, Worcester, with not quite half the population of Middlesex, sees only one-third the travel expenditures seen in Middlesex. Tourism-related jobs in Hillsborough are almost equivalent to Middlesex, but again, Worcester has only about one-third the jobs seen in Middlesex.

We are on safer ground looking at the counties, but in the effort to know as much as we can about the National Heritage Area, Table G-3 also includes results extrapolated, speculatively, by apportioning the county data by the amount of population found in the heritage area, by county. This tends to enhance the previously described differences between the counties, but does not change the fundamentals. Since Hillsborough has the highest proportion of its population in the heritage area, its position changes for the better, and since Worcester has the lowest proportion, its already low position is slightly lowered, most pronounced when it comes to jobs.

Table G-3 States' County-Level Tourism Data Broken Down by Proportion of Freedom's Way Population

	TOTAL	Middlesex Co, MA	Worcester Co, MA	Hillsborough Co, NH
Partly Reliable Data				
County share of state's direct traveler spending (County number supplied by NHDTTD; calculated for MA from MOTT report)		14.7%	5.0%	23.9%
NH Rooms and Meals Sales to Travelers, FY2012 (County number supplied by NHDTTD; in millions)				\$397
EXPENDITURES (in millions): Travel Spending, Employment and Related Impacts, FY2012 (NH, County share apportioned – not reliable); Travel Expenditures, 2012 (MA, County share reported by MOTT)		\$2,258	\$771	\$1,634
PAYROLL (in millions): Travel Spending, Employment and Related Impacts, Payroll, FY2012 (NH County share apportioned – not reliable); Travel Payroll, 2012 (MA, County share reported)		\$580	\$145	\$384
JOBS: Jobs from Direct Traveler Spending, FY2012 (NH County share apportioned – not reliable); Travel Employment, 2012 (MA, County share reported)	41,437	19,800	5,300	16,337
Speculative Data				
NHA Population as % of County's	27.9%	29.2%	22.5%	33.5%
NHA share of state's direct traveler spending (factored by percentage of county population in the NHA)		4.3%	1.1%	8.0%
NHA POSSIBLE EXPENDITURES (in millions; all travel expenditures)	\$6,306	\$659	\$174	\$547
NHA POSSIBLE PAYROLL (in millions; all travel expenditures)	\$331	\$169	\$33	\$129
NHA POSSIBLE JOBS (all travel expenditures)	12,450	5,785	1,193	5,473
SOURCE: NH Division of Travel and Tourism Development and MA Office of Travel and Tourism statewide tourism reports for 2012, compiled by Heritage Strategies, LLC, November 2014; population data drawn from Table G-2				

The problem, of course, is that we do not know how accurate these results for the heritage area may be. Hospitality businesses might be spread through the counties and their National Heritage Area portions the same way as the population – or they might not. We need a finer-grained way to understand the distribution of businesses that benefit from tourism. Fortunately, as explained in the next section, there is one readily available source of data, the U.S. Census.

There are some important major caveats to explain at this point, however. The actual economic impact of tourism, as the states know (and pay for the research in order to know), is best understood by measuring travelers' behavior and actual dollar results of that behavior – not the location of businesses. Leisure and hospitality businesses serve other markets in addition to travelers – residents and customers traveling less than fifty miles from home. (The usual definition of a tourist includes the criterion that he or she has made a trip of fifty miles or more. Lodging is therefore more important in the scheme of things than other kinds of businesses, for the economic impact of a traveling party that stays overnight is generally greater.) To the extent that these businesses (and their employment and payroll), however, are located in the National Heritage Area, we have an indicator that the infrastructure exists to host the market to be cultivated through actions explained in the management plan, Chapter 5.

One of those actions is to create a mid-term economic development plan for cultural heritage tourism five years hence. A part of that plan could include taking all such analysis described in this report to the logical next level, of predicting the future economic impact of such a plan if successfully executed, using methodologies similar to those employed for the states' tourism impact assessments. Another action is to encourage attractions to begin counting their visitors using a uniform approach that would help get at information even the states have trouble knowing for sure – the actual numbers of visitors.

G.5 Further Analysis

Given these basic facts and an understanding from the two states' tourism reports that Freedom's Way is situated in highly productive counties or regions of both states, as described above, we wanted to know: just how well situated IS Freedom's Way to grow its cultural heritage tourism? We believe that the answer is, very well indeed.

G.5.1 Existing Conditions

Chapter 2 describes a heritage area-wide presentation to be developed from existing attractions, community interpretive programs, and the heritage area's own work. This comprises the heart of the visitor experience to be produced by the heritage area. But tourism needs more than interpretation – there must be businesses offering hospitality and services to create a complete experience. Since two out of three counties are among the highest-producing tourism counties of both states, they are already well ahead of more remote rural places elsewhere without existing market and hospitality infrastructure nearby. If the heritage area is successful in building its audience of cultural heritage travelers, there is likely a warm, comfortable welcome nearby, at least in its three counties if not within bounds. The heritage area's localities may not benefit economically as greatly if visitors are not lodging and dining in its territory, but as explained elsewhere, tourism development from business investment within the heritage area follows from demand. If demand builds, sooner or later investors will develop (or could be induced to develop – a possibility for study in the aforementioned mid-term economic development plan).

We also know the region is already receiving much visitation based on recreation and "countryside" experiences – which cultural heritage travelers also seek along with museums, historic sites, historic

downtowns, and all the rest as described in Chapter 2. Anecdotally, those who are visiting Freedom's way to enjoy hiking, parks, bicycle riding, and visiting the region's many farm attractions is a large audience – further assessment requires further study to generate the necessary data. Such research should be undertaken in the mid-term economic development plan for cultural heritage tourism for Freedom's Way.

Changes in conditions supporting hiking, parks, and bicycling in recent years has been incremental. Major public investment is needed in land conservation, park facilities, trail building, and road and trail improvements for bicyclists and takes a great deal of time to program and accomplish. We do know that the region has more than [120] miles of hiking and off-road improved bicycling trails. Perhaps that much again is programmed for future investment, and there are many more locally conserved lands with local recreational trails.

We do have one indicator that the "countryside audience" is a growing one (what used to be called "driving for pleasure" – although not politically correct, perhaps, this has long been found by those measuring leisure-time preferences across the country to be a top preference). Four years ago, a "MassGrown" brochure and map put together by the Massachusetts Department of Agriculture identified just forty farm businesses for promotion in the region occupied by Freedom's Way (the map does not delineate the heritage area). Today, the MassGrown website allows a user to identify as many as 400 such businesses in the landscape defined as thirty miles from any direction from Devens (the Freedom's Way headquarters). Regardless of how accurate these numbers might be, such growth is highly suggestive that farm attractions, part of the private sector, have clearly responded to growing public interest in local foods and the experience of knowing who grows one's food. Enough visitors are making their way to the region because of its farms that the farms are responding with investment of their own to be able to serve this market. (Some, but probably not most, of these businesses probably are found in the data enabling us to analyze the economic weight of "leisure and hospitality" establishments. Parker's Maple Barn in Mason, NH, for example, a maple sugar operation, includes a full-service restaurant.)

G.5.2 Studying Hospitality Business Infrastructure

Returning to the question of how strong the hospitality business infrastructure might be in the heritage area, versus the counties as a whole, this section attempts to answer this question.

We asked (1) what is the hospitality business infrastructure existing in each town? This would help us answer (2) whether the heritage area's portion of the counties' reported shares of state tourism is higher or not, on a percentage basis, than the percentage of population found in each county's share of the National Heritage Area. We are exploring the data to help us with our hypothesis that if the level of leisure and hospitality businesses most interesting to heritage travelers in heritage-area portions of each county at least match the population divide described in Table G-2, the heritage area is well-positioned to encourage greater tourism.

The data we used to explore possible answers is drawn from the U.S. Census's ZIP Code Business Patterns and County Business Patterns, which report 2012 economic census information on business establishments (characteristics, employment, and payroll) based on the North American Industry Classification System (NAICS). We used selected data from "Arts, entertainment, and recreation" (NAICS Code 71) and "Accommodation and food services" (72) as indicators; together these are often linked in larger groups called "leisure and hospitality supersector."²

² <http://www.bls.gov/iag/tgs/iag70.htm>. Other NAICS codes are as follows: Agriculture, forestry, fishing and hunting (11), Mining, quarrying, and oil and gas extraction (21), Utilities (22), Construction (23), Manufacturing

These are not complete measures of tourism activity, however, as they only measure business activity – they do not characterize customers (residential vs. visiting), business receipts (volume/size – although the number of employees is a proxy for this), or economic impact. They also do not include some kinds of businesses that visitors enjoy, especially retail shops. The methodologies used by the two states for their statewide reports, selectively reported in Table G-3, are more accurate in these aspects, as they both separate out visiting versus resident customers; account for other businesses where visitors have an impact but which are not specifically part of the hospitality industry; and look at the overall impact of dollars circulating in the local economy.

The NAICS data also do not measure level of quality, an important factor in cultural heritage tourism, where visitors typically look for quality, authenticity, and unique experiences. To attempt to get at this issue, we went beyond the two-digit code to look at our choices of sub-codes. Some sub-codes imply business establishments that may not be conducive to stimulating or serving cultural heritage travelers, such as fast food establishments. We also eliminated recreational businesses, including skiing and golf; although outdoor recreation is high on lists of preferences of cultural heritage travelers, especially for multi-person parties where they seek varying activities during the day and come back together in the evening, we believed this might skew our results, since rural communities tend to have slightly more of these because of cheaper land and topography. We wanted to create comparable bodies of data for entire counties and the heritage area's portions of the counties. (See attachment for our choices.)

With all those caveats, looking at NAICS 71 and 72 does give us some indication of the level of business activity supporting current tourism and which would support an emphasis on cultural heritage tourism – what we call “hospitality infrastructure.”

Proportion of General Leisure and Hospitality Business Activity in the National Heritage Area

Taken together, as shown in Table G-4, the data show that the three counties that include the Freedom's Way National Heritage Area have a total of 70,800 business establishments of all kinds (line 2). The heritage area has 26.7 percent of these, 18,913. This seems at the largest scale to bear out our prediction that the level of business activity would correspond with population, for the heritage area has 27.9 percent of the three counties' population (line 1).

Moving to the next level, the 71 and 72 series of data on leisure and hospitality establishments, we can see that the counties have a total of 7,382 such businesses, and 24.3 percent of these are in Freedom's way, almost 1,800 (line 3). Again, this is close to the population divide – although we would have liked to see that number edge up above the population percentage. This might be an indicator for long-range monitoring – the “needle” the heritage area would try to move once it engages in the mid-term economic development plan.

There is little difference in the proportion of these businesses versus all other kinds of businesses inside the heritage area versus the entire county (lines 5 and 6). Only the Worcester portion of the heritage area exceeds its county proportion, and not to a degree of any significance. This might be another

(31-33), Wholesale trade (42), Retail trade (44-45), Transportation and warehousing (48-49), Information (51), Finance and insurance (52), Real estate and rental and leasing (53), Professional, scientific, and technical services (54), Management of companies and enterprises (55), Administrative and support and waste management and remediation services (56), Educational services (61), Health care and social assistance (62), Other services (except public administration) (81), and Industries not classified (99). NAICS does not measure governmental jobs or the self-employed.

indicator for long-range monitoring, since this provides a base and basis for comparison from which to measure growth that might appear in future economic census data.

Importance of These Establishments to the Regional Economy

Let us pause here to rank leisure and hospitality establishments among all sectors, by county. Table G-4 also offers the best analysis we are able to undertake of the importance of the heritage area's existing leisure and hospitality establishments to the regional economy. The number of leisure and hospitality establishments ranks 3rd of all industry sectors in Worcester County, 4th in Middlesex, and 5th in Hillsborough (line 4). Fully ten percent of the three counties' businesses are classified as leisure and hospitality establishments (line 5). This holds true within a few tenths of a percent individually in all counties, as well. Since the heritage area's population of leisure and hospitality business establishments comprises nearly one-quarter of this business, 24.3 percent (line 3), they are significant to the region's economic health in hospitality infrastructure as well.

Proportion of Selected Business Activity in the National Heritage Area

Regarding the categories selected for further investigation in search of an infrastructure for cultural heritage tourism, businesses in these categories are a little more than one-third the total leisure and hospitality establishments in the three counties (line 9 versus line 1). (Since this is pioneering research, we have no basis for comparison, but an easy one to create, perhaps in other heritage areas.) In the heritage area, that proportion is almost identical. Since this exceeds our "population divide," this finding may be significant according to our hypothesis that any distribution higher than the population divide suggests that **hospitality infrastructure can at least be considered healthy**, if not yet robust on a conceptual cultural heritage tourism spectrum of down-market to robust.

The National Heritage Area possesses a quarter of all those leisure and hospitality establishments found in the three counties, 659 heritage-area businesses out of 2,647 (line 9). (Remember that this number does not count retail or agricultural attractions. It should include nonprofit organizations related to leisure and hospitality but we believe there is an under-count of museums and historic sites.) Of these, more than half are found in Worcester County, and the remainder is divided roughly equally between Hillsborough County and Middlesex County, each with under a quarter of the selected businesses (line 9).

Table G-4 Leisure and Hospitality Business Activity in the Freedom's Way National Heritage Area

	TOTAL			Middlesex				Worcester				Hillsborough			
	Three Counties	Entire NHA	NHA Share	County	NHA Portion	NHA Share (%)	County NHA Share	County	NHA Portion	NHA Share (%)	County NHA Share	County	NHA Portion	NHA Share (%)	County NHA Share
1. NHA population as % of County (Table G-2)		27.9%			29.2%				22.5%				33.5%		
2. All establishments, all sectors	70,800	18,913	26.7%	42,453	11,261	26.5%		17,646	3,828	21.7%		10,701	3,824		
3. All leisure & hospitality estab's, 71+72	7,382	1,796	24.3%	4,344	991	22.8%	55.2%	1,987	423	21.3%	23.6%	1,051	382	36.3%	21.3%
4. County ranking – leisure & hospitality estab's vs. all sectors				4 th				3 rd				5 th			
5. All County leisure & hospitality estab's, % all County establishments	10.4%			10.2%				11.3%				9.8%			
6. NHA leisure & hospitality estab's, % all NHA establishments		9.5%			8.8%				11.1%				10.0%		
7. 71 - Arts, Entertainment, and Recreation - Total Selected Count	238	89	37.4%	165	53	32.1%		41	28	68.3%		32	8	25.0%	
8. 72 - Accommodation and Food Services - Total Selected Count	2,409	570	23.7%	1,387	304	21.9%		658	131	19.9%		364	135	37.1%	
9. Total selected leisure & hospitality establishments, 71+72	2,647	659	24.9%	1,552	357	23.0%	54.2%	699	159	22.7%	24.1%	396	143	36.1%	21.7%
10. Total selected establishments (line 9), % of all 71+72 (line 3)	35.9%	36.7%		35.7%	36.0%			35.2%	37.6%			37.7%	37.4%		

SOURCE: Heritage Strategies, LLC, November 2014 (except in the case of lodging) employing ZIP Code Business Patterns (ZBP) and County Business Patterns, 2012 series released on June 12, 2014 from the U.S. Census (<http://www.census.gov/econ/cbp/>), using the North American Industry Classification System (NAICS) to compare total business establishments to (%) total leisure and hospitality establishments, which are self-identified (NAICS – Arts, entertainment, and recreation (71); Accommodation and food services (72)). Restaurant numbers indicated are for establishments self-identifying in the ZBP as full service (NAICS 722511, where patrons order and are served while seated and pay after eating). Lodging numbers were generated by Heritage Strategies, LLC, from Google Earth, Google+, and (in one case) Expedia in November 2014; while accuracy cannot be certified, the total discovered generally validates the total reported in the ZBP (HSLLC=67; ZBP=57 “Hotels (except Casino Hotels) and Motels” (NAICS 721110); reasons for the variance could not be determined as ZBP entries cannot be mapped). The ZBP, however, significantly under-reported B&B lodging (3 self-reported vs. 28 as counted by HSLLC using qualitative judgment). (Possibly those filing their reports did not understand their opportunity to distinguish their lodging under NAICS as “Bed-and-Breakfast Inns” (721191) or it was advantageous to choose another category.) Establishments that include both lodging and a full-service restaurant are identified as single establishments – probably lodging, so the number of full-service restaurants in the region may be somewhat higher than indicated by the data. (For example, the Hilton Garden Inn in Devens with its Great American Grill® restaurant is probably one establishment, as only one full-service restaurant was reported for Devens, likely the Devens Grill, a free-standing restaurant near the Hilton Garden Inn.)

NOTE RE MAPPING: As data was collected by ZIP code, technically any map should show ZIP code boundaries for display of percentage of leisure and hospitality establishments as a percentage of establishments overall. While ZIP codes closely correspond to city and town boundaries in many cases in the Freedom’s Way NHA, they are not one and the same. Because they are so close, however, we chose to map this data using towns for convenience and correlation to other data displayed in maps.

G.5.3 Payrolls and Employment in the Hospitality Industry

For the sake of completeness, Table G-5 offers data collected but not analyzed at the granular level as we have demonstrated for leisure and hospitality establishments above. The large difference between leisure and hospitality paychecks versus all paychecks, which are significantly higher in all counties, is explained in great measure by the large number of seasonal and part-time employees in the leisure and hospitality industry. The benefits of business establishments and employment are explained further in Chapter 5.

Table G-5 Leisure & Hospitality Employment and Payroll in the Freedom’s Way National Heritage Area

	TOTAL	Hillsborough Co, NH	Middlesex Co, MA	Worcester Co, MA
Ranking - number of leisure & hospitality employees <u>county-wide</u> vs all other sectors		4th	5th	4th
Ranking - Size of leisure & hospitality payroll <u>county-wide</u> vs all other sectors		10th	12th	9th
Avg annual leisure & hospitality paycheck earned in counties ¹	\$18,804	\$17,507	\$20,462	\$15,660
Avg annual paycheck earned in counties	\$60,516	\$47,556	\$68,722	\$44,514
Number of leisure & hospitality employees, NHA area only ¹	28,551	6,520	15,823	6,208
All county leisure & hospitality jobs as pct of all county jobs	9.2%	10.5%	8.5%	10.4%
Footnote 1: Extrapolated estimate. Because zip code areas are small and thus the number of businesses can also be small, the U.S. Census does not provide this data for confidentiality reasons. Estimates were created by determining the percentage of business establishments devoted to tourism in the Counties that are in the heritage area, and multiplying that percentage by the County-level payroll (first reference) and by County-level number of employees (second reference) to determine NHA paycheck (total extrapolated tourism payroll divided by total extrapolated tourism employment).				
SOURCE: Heritage Strategies, LLC, November 2014, employing County Business Patterns and ZIP Code Business Patterns, 2012 series from the U.S. Census (http://www.census.gov/econ/cbp/), supplemented by the Census’s QuickFacts for the three counties (http://quickfacts.census.gov/qfd/index.html) and lists of municipalities available from Wikipedia (http://en.wikipedia.org/wiki/List_of_municipalities_in_Massachusetts#cite_note-MMA-1 and http://en.wikipedia.org/wiki/List_of_cities_and_towns_in_New_Hampshire#cite_note-2), used for NHA population calculations.				

G.6 Conclusion: Positioning Freedom’s Way to Participate in the Tourism Economy

The preceding analysis has demonstrated that the communities and businesses of Freedom’s Way National Heritage Area are well positioned to build cultural heritage tourism.

The National Heritage Area overlaps both states’ most important tourism regions. In New Hampshire, it is served by two tourism regions, Merrimack Valley (as discussed above, the state’s highest “producer” and covering Nashua and six towns due west) and Monadnock (New Ipswich, furthest west). The Massachusetts portion of the heritage area is served primarily by two as well, the Johnny Appleseed Trail Association (area 10 on the state’s tourism map, see Appendix C) and the Merrimack Valley Conference and Visitors Bureau (area 3). Six towns are served apart from these: the Metro West Visitors Bureau (area 9) serves Sudbury and Hudson in the southern portion of the heritage area and the Greater

Boston Convention and Visitors Bureau (area 1) serves Arlington, Malden, Medford, and Woburn in the heritage area's eastern, urban core. [Note: The GBCVB's website does not include a link to Woburn but we are assuming this is an oversight.]

All of these places, whether they are in the heritage area or not, offer considerable leisure and hospitality infrastructure. In general, it is clear that the National Heritage Area is well-positioned to grow its cultural heritage tourism. All three of its counties, Hillsborough in New Hampshire, and Middlesex and Worcester in Massachusetts, are among those already receiving highest tourism spending. Even if we do not know the distribution of that spending within counties, we know that if the heritage area itself does not possess the tourism infrastructure, it is next door – almost as good. It is possible to generate audiences for sites and programs within the heritage area, and feed and house them nearby. Although communities seeing increased audiences will not see direct economic benefits right away, long-term the attracting of audiences will build markets that attract investors. In the meanwhile communities nearby can be persuaded to help with promoting the National Heritage Area in order to benefit their own lodging and restaurants (and attractions) as much as possible.

Attachment: Explanation of NAICS Data Chosen for Analysis

For each zip code (more than the 45 cities and towns), we selected, from among the many six-digit codes offered, those that included the kinds of activities we deemed most likely to be attractive to a cultural heritage traveler. (It is not that heritage travelers might not enjoy other aspects of the leisure and hospitality establishments documented in this economic census. There were limits to how many data points we were willing to select, and we wanted the richest sampling.) These included (in the order found in the ZBP/CBP data):

- Theater Companies and Dinner Theaters; Dance Companies (711110, 711120)
- Musical Groups and Artists; Independent Artists, Writers, and Performers; (711130, 711510)
- Number of museums, historical sites (712110, 712120)
- Nature Parks and Other Similar Institutions (712190); Zoos and Botanical Gardens (712130)
- Hotels (except Casino Hotels) and Motels (721110)
- Bed-and-Breakfast Inns (721191); All Other Traveler Accommodation (721199)
- Full Service Restaurants (722511)

NAICS Detailed Data Used in Analysis – Code 71 – Arts, Entertainment, and Recreation (six-digit key indicators highlighted were used to generate data in Tables G-4, G-5, and, below, G-6)

711	Performing Arts, Spectator Sports, and Related Industries
7111	Performing Arts Companies
71111	Theater Companies and Dinner Theaters
711110	Theater Companies and Dinner Theaters
71113	Musical Groups and Artists
711130	Musical Groups and Artists
71119	Other Performing Arts Companies
711190	Other Performing Arts Companies
7112	Spectator Sports
71121	Spectator Sports
711211	Sports Teams and Clubs
711219	Other Spectator Sports
7113	Promoters of Performing Arts, Sports, and Similar Events
71131	Promoters of Performing Arts, Sports, and Similar Events with Facilities
711310	Promoters of Performing Arts, Sports, and Similar Events with Facilities
71132	Promoters of Performing Arts, Sports, and Similar Events without Facilities
711320	Promoters of Performing Arts, Sports, and Similar Events without Facilities
7114	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures
71141	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures
711410	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures
7115	Independent Artists, Writers, and Performers
71151	Independent Artists, Writers, and Performers
711510	Independent Artists, Writers, and Performers
712	Museums, Historical Sites, and Similar Institutions
7121	Museums, Historical Sites, and Similar Institutions
71211	Museums
712110	Museums
71212	Historical Sites
712120	Historical Sites
71213	Zoos and Botanical Gardens
712130	Zoos and Botanical Gardens
71219	Nature Parks and Other Similar Institutions

712190	Nature Parks and Other Similar Institutions
713	Amusement, Gambling, and Recreation Industries
7131	Amusement Parks and Arcades
71311	Amusement and Theme Parks
713110	Amusement and Theme Parks
71312	Amusement Arcades
713120	Amusement Arcades
7139	Other Amusement and Recreation Industries
71391	Golf Courses and Country Clubs
713910	Golf Courses and Country Clubs
71392	Skiing Facilities
713920	Skiing Facilities
71394	Fitness and Recreational Sports Centers
713940	Fitness and Recreational Sports Centers
71395	Bowling Centers
713950	Bowling Centers
71399	All Other Amusement and Recreation Industries
713990	All Other Amusement and Recreation Industries

Note: Six-digit data includes three-, four-, and five-digit data.

NAICS Detailed Data Used in Analysis – Code 72 – Accommodation and Food Services (six-digit key indicators used in the attached table are highlighted)

72----	Accommodation and Food Services
721	Accommodation
7211	Traveler Accommodation
72111	Hotels (except Casino Hotels) and Motels
721110	Hotels (except Casino Hotels) and Motels
72119	Other Traveler Accommodation
721191	Bed-and-Breakfast Inns
721199	All Other Traveler Accommodation
7212	RV (Recreational Vehicle) Parks and Recreational Camps
72121	RV (Recreational Vehicle) Parks and Recreational Camps
721211	RV (Recreational Vehicle) Parks and Campgrounds
721214	Recreational and Vacation Camps (except Campgrounds)
7213	Rooming and Boarding Houses
72131	Rooming and Boarding Houses
721310	Rooming and Boarding Houses
722	Food Services and Drinking Places
7223	Special Food Services
72231	Food Service Contractors
722310	Food Service Contractors
72232	Caterers
722320	Caterers
72233	Mobile Food Services
722330	Mobile Food Services
7224	Drinking Places (Alcoholic Beverages)
72241	Drinking Places (Alcoholic Beverages)
722410	Drinking Places (Alcoholic Beverages)
7225	Restaurants and Other Eating Places

[TEXT CONTINUES ON PAGE 345]

Table G-6 Leisure and Hospitality Business Activity in the Freedom's Way National Heritage Area, Detail (unresolved anomalies in data)

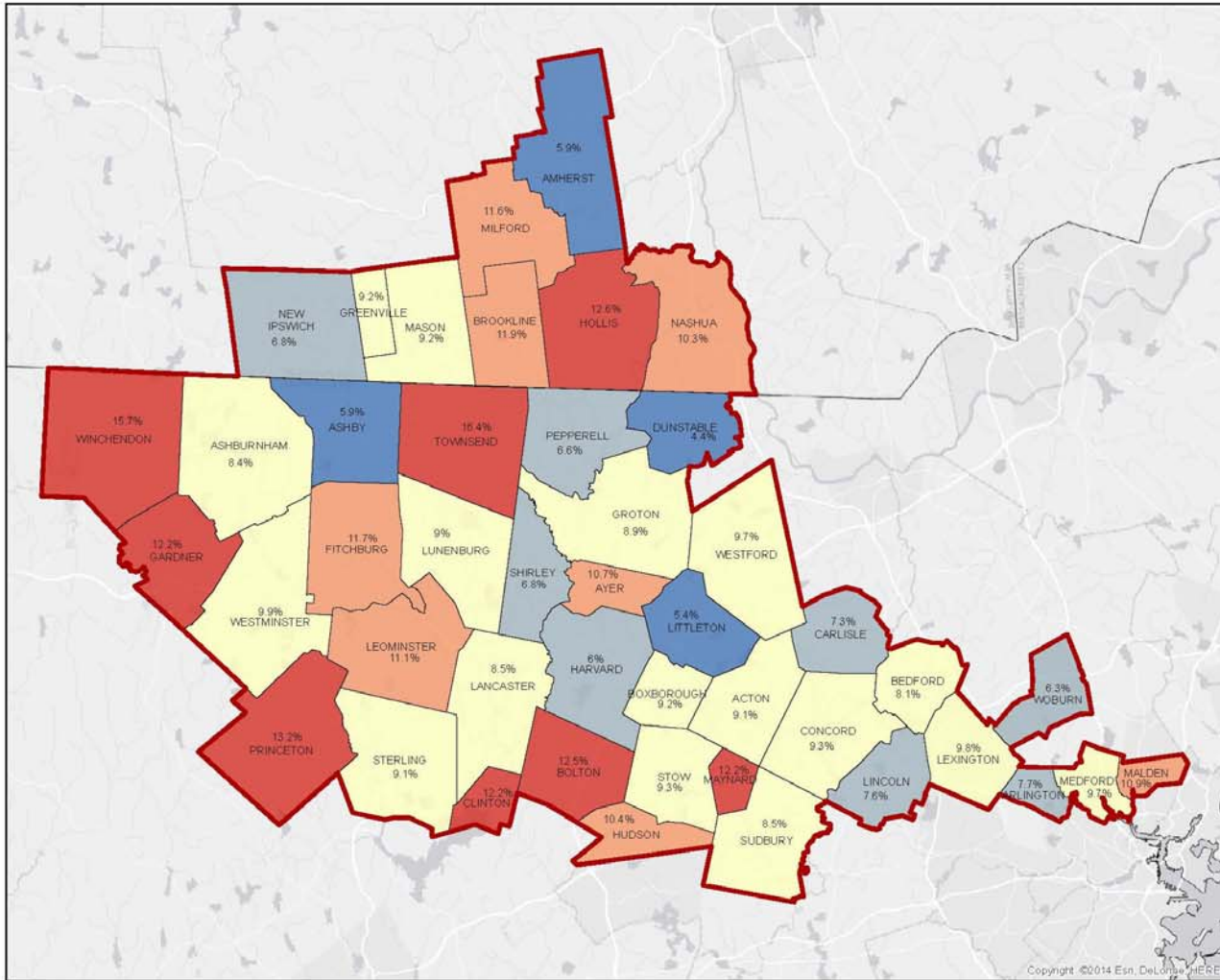
Col. A	B	TOTAL			Middlesex			Worcester			Hillsborough		
		C	D	E	F	G	H	I	J	K	L	M	N
		Three Counties	NHA portion	NHA share (%)	County	NHA portion	NHA share (%)	County	NHA portion	NHA share (%)	County	NHA portion	NHA share (%)
	1. Number of establishments overall, all sectors	70,800	18,913	26.7%	42,453	11,261	26.5%	17,646	3,828	21.7%	10,701	3,824	35.7%
71+72	2. Number of hospitality & leisure establishments	2,875	718	25.0%	1,687	389	23.1%	757	176	23.2%	431	153	35.5%
71	3. Arts, Entertainment, and Recreation - Total <i>Unselected</i> Count	1,125	340	30.2%	710	218	30.7%	255	69	27.1%	160	53	33.1%
71	4. Arts, Entertainment, and Recreation - Total <i>Selected</i> Count	460	145	31.5%	300	83	27.7%	95	44	46.3%	65	18	27.7%
71	5. % selected	40.9%	42.6%		42.3%			37.3%			40.6%		
72	6. Accommodation and Food Services - Total <i>Unselected</i> Count	6,257	1,456	23.3%	3,634	773	21.3%	1,732	354	20.4%	891	329	36.9%
72	7. Accommodation and Food Services - Total <i>Selected</i> Count	2,415	573	23.7%	1,387	306	22.1%	662	132	19.9%	366	135	36.9%
72	8. % selected	38.6%	39.4%		38.2%			38.2%			41.1%		
	DETAIL:												
Industry code	Industry code description												
711110; 711120	9. Theater Companies and Dinner Theaters; Dance Companies	31	4	12.9%	23	3	13.0%	3	0	0.0%	5	1	20.0%
711130; 711510	10. Musical Groups and Artists; Independent Artists, Writers, and Performers	123	36	29.3%	91	27	anomaly	20	5	25.0%	17	4	23.5%
712110; 712120	11. Museums; Historical Sites	78	47	60.3%	70	20	28.6%	15	23	anomaly	6	4	66.7%
712130; 712190	12. Zoos and Botanical Gardens; Nature Parks and Other Similar Institutions	9	4	44.4%	4	3	75.0%	3	0	0.0%	4	1	25.0%

Col. A	B	TOTAL			Middlesex			Worcester			Hillsborough		
		C	D	E	F	G	H	I	J	K	L	M	N
		Three Counties	NHA portion	NHA share (%)	County	NHA portion	NHA share (%)	County	NHA portion	NHA share (%)	County	NHA portion	NHA share (%)
721110	13. Hotels (except Casino Hotels) and Motels	148	54	36.5%	112	30	26.8%	54	16	29.6%	33	8	24.2%
721191; 721199	14. Bed-and-Breakfast Inns; All Other Traveler Accommodation	15	3	20.0%	9	2	22.2%	4	1	25.0%	2	0	0%
722511	15. Full-Service Restaurants	2,195	513	23.4%	1,266	272	21.5%	600	114	19.0%	329	127	38.6%

SOURCE: Heritage Strategies, LLC, November 2014 (except in the case of lodging) employing ZIP Code Business Patterns (ZBP) and County Business Patterns, 2012 series released on June 12, 2014 from the U.S. Census (<http://www.census.gov/econ/cbp/>), using the North American Industry Classification System (NAICS) to compare total business establishments to (%) total leisure and hospitality establishments, which are self-identified (NAICS – Arts, entertainment, and recreation (71); Accommodation and food services (72)). Restaurant numbers indicated are for establishments self-identifying in the ZBP as full service (NAICS 722511, where patrons order and are served while seated and pay after eating). Lodging numbers were generated by Heritage Strategies, LLC, from Google Earth, Google+, and (in one case) Expedia in November 2014; while accuracy cannot be certified, the total discovered generally validates the total reported in the ZBP (HSLLC=67; ZBP=57 “Hotels (except Casino Hotels) and Motels” (NAICS 721110); reasons for the variance could not be determined as ZBP entries cannot be mapped). The ZBP, however, significantly under-reported B&B lodging (3 self-reported vs. 28 as counted by HSLLC using qualitative judgment). (Possibly those filing their reports did not understand their opportunity to distinguish their lodging under NAICS as “Bed-and-Breakfast Inns” (721191).) Establishments that include both lodging and a full-service restaurant are identified as single establishments – probably lodging, so the number of full-service restaurants in the region may be somewhat higher than indicated by the data. (For example, the Hilton Garden Inn in Devens with its Great American Grill® restaurant is probably one establishment, as only one full-service restaurant was reported for Devens, likely the Devens Grill, a free-standing restaurant near the Hilton Garden Inn.)

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NOTE: Two maps are to be attached in the final plan – see attached drafts. Map A, “Towns’ Economic Reliance on Leisure and Hospitality” endeavors to show the proportion of selected businesses found in the heritage area’s forty-five towns, ranging from 4-5 percent (yellow) to 12.2-16.4 percent (green). As might be expected, since rural business populations are smaller and often more reliant on leisure and hospitality businesses (when close enough to major population centers), none of the “green” cities and towns are major population centers (see draft Demographic Map in Appendix C – 2010 Population). Map B, “Numbers of Reported Leisure and Hospitality Establishments” confirms that the larger populations in absolute numbers are found in major population centers.



Freedom's Way National Heritage Area Management Plan

Percentage of Hospitality and Leisure Business Est.

Data Sources: Esri

- Project Study Area
- Town Boundaries

Percentage of Hospitality Establishments

- 4.0% - 5.9%
- 6.0% - 7.9%
- 8.0% - 9.9%
- 10.0% - 11.9%
- >12%

Map prepared for the Freedom's Way Heritage Association, Inc.

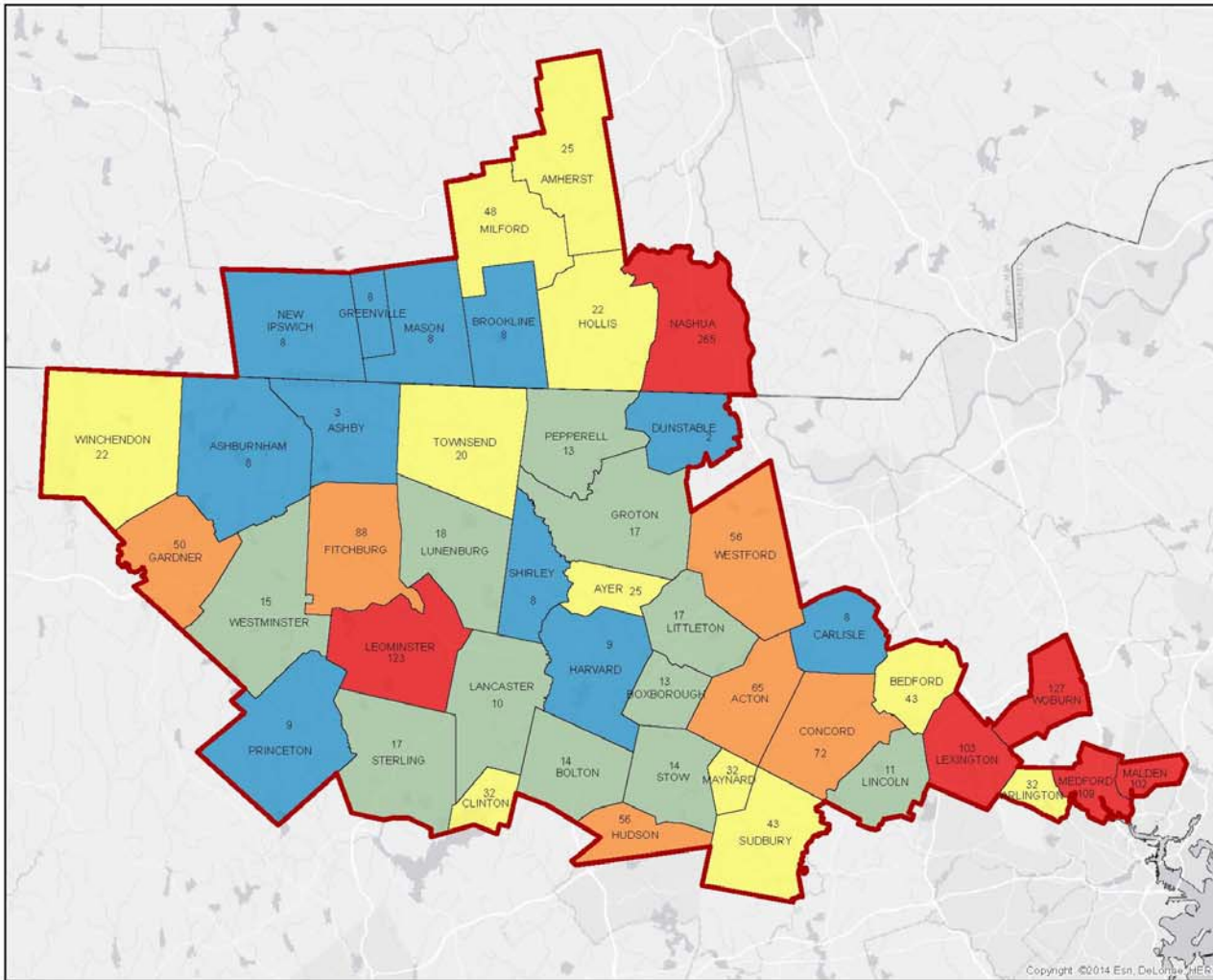
Map prepared by Heritage Strategies, LLC and Washington College Center for Environment and Society

0 2.5 5 10 Miles

Washington College
WASHINGTON COLLEGE
GEOGRAPHIC INFORMATION SYSTEMS

HERITAGE strategies

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Freedom's Way National Heritage Area Management Plan

Number of Hospitality and Leisure Business Est.

Data Sources: Esri

- Project Study Area
- Town Boundaries

Number of Hospitality Establishments

- 2-9
- 10-19
- 20-49
- 50-99
- 100-265

Map prepared for the Freedom's Way Heritage Association, Inc.

Map prepared by Heritage Strategies, LLC and Washington College Center for Environment and Society

0 2.5 5 10 Miles

Washington College
WASHINGTON COLLEGE
GEOGRAPHIC INFORMATION SYSTEMS

HERITAGE strategies

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72251	Restaurants and Other Eating Places
722511	Full-Service Restaurants
722513	Limited-Service Restaurants
722514	Cafeterias, Grill Buffets, and Buffets
722515	Snack and Nonalcoholic Beverage Bars

The following tables are offered with the cautionary note that we uncovered some anomalous data in a key indicator, museums and historic sites, and also in a couple of other places. We were unable to resolve these anomalies in the time available for this report. The anomaly appears to stem from data reported differently in the ZIP Code Business Patterns data (used to generate the heritage-area level data) than the County Business Patterns (used to generate the county-level data). For example, we noted that 711120, Dance Companies, appear not to have been collected in the county lists used to generate this explanation; similarly, 711190, Other Performing Arts Companies, was not collected in the zip code lists used to generate the city-town data.

That said, we believe the following data in Table G-6 are of interest and may provide direction for future refinement, research, and assessment. These data indicate that the heritage area exceeds to a significant degree the “population divide” criterion discussed in the main body of this report in Arts, Entertainment, and Recreation (both unselected and selected). See Table G-6, below, column E. (Lines 5 and 8, although at first seeming significant, simply demonstrate that the NHA mirrors the three counties in proportion of selected vs. unselected.) Column E in particular bears out the planning team’s impression that the region is rich in attractions and sites (Arts, Entertainment, and Recreation, lines 3 and 4, column E) but under-supplied with businesses at the cultural heritage traveler end of the spectrum of hospitality businesses (Accommodation and Food Services, lines 6 and 7, column E). This is a preliminary conclusion that requires a thorough re-running of the numbers (we double-checked what we have but we ran out of time on the re-extraction from U.S. Census data required for this) plus qualitative inventorying on the ground. Interesting variations from this pattern requiring further investigation are Worcester’s NHA share of selected Arts, Entertainment, and Recreation businesses (46.3%, line 4, column K) and Hillsborough’s NHA share of selected Full-Service Restaurants (38.6%, line 15, column N), although the latter is probably explained by Nashua’s dominance (as described in the main report). Worcester’s result reflects the anomaly we were unable to resolve (line 11, column K).

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