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# Nature-Based and Cultural-Heritage Tourism in Piscataquis County: Survey Analysis

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**NATURE-BASED AND  
CULTURAL-HERITAGE TOURISM  
IN PISCATAQUIS COUNTY**  
Survey Analysis

*Prepared by*

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Acknowledgements: This research was funded by the United States Department of Agriculture, Rural Development, Rural Business Opportunity Grants.

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## INTRODUCTION

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In the summer of 2003, researchers from The University of Maine and community leaders from Piscataquis County, Maine engaged in a series of discussions on the future course of tourism and economic development in Piscataquis County. Community leaders affirmed that the best way to ensure that development harmonizes with the visions and needs of residents is for those residents to play an active role in the development process. To that end, they assisted university researchers in designing a mechanism to assess local attitudes toward nature-based and cultural-heritage tourism and elicit feedback on alternative development scenarios.

One phase of that process was surveys of residents and businesses operators in Piscataquis County. The surveys, which were implemented from April to July, 2004, were conducted by the Margaret Chase Smith Center for Public Policy and the Department of Resource Economics and Policy at The University of Maine. This research was funded by the United States Department of Agriculture, Rural Development, Rural Business Opportunity Grants.

This report provides an overview of the survey responses. In addition, the report summarizes the methods used in conducting the surveys. The appendices to this report present the survey questionnaires and aggregate survey responses.

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## METHODOLOGY

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### **Resident Survey Sample**

The population of residents was defined as registered voters within the towns of Brownville, Dover-Foxcroft, Greenville, and Milo. Lists of registered voters were provided by those municipalities and random samples were taken from each town list. The number of voters selected from each town was proportionate to the size of each town's population relative to the total population of all four towns. Interval samples were drawn to generate a sample of at least 1,000. The original survey sample contained a total of 1,071 individuals.

During the course of the survey, a number of the mailings were returned by the postal service as undeliverable. Those returned with forwarding addresses were then mailed to the forwarding address. A total of 235 were returned with no forwarding address and were determined to be undeliverable. In addition, through phone, mail, and email, 18 members of the original survey population reported that they were either no longer residents of Piscataquis County area, were too ill to complete the questionnaire, or were deceased. Since those individuals did not have an opportunity to participate in the survey, they were removed from the original survey sample. The final survey sample contained a total of 818 individuals.

Table 1 presents the original survey sample, those removed, and the final survey sample for each town in each group.

**Table 1**  
**Resident Survey Sample**

Municipality	Original Sample	Removed	Final Sample
Brownville	138	51	87
Dover-Foxcroft	459	115	344
Greenville	214	41	173
Milo	260	46	214
TOTAL	1,071	253	818

### **Business Survey Sample**

The population of businesses in Piscataquis County was defined as those businesses included in a commercially available database of Piscataquis County businesses. From the list of 587 businesses, 35 records were removed because they were municipal, state, federal, or non-profit entities. The final business population contained 552 businesses in Piscataquis County.

A number of the mailings were returned by the postal service as undeliverable. Those returned with forwarding addresses were then mailed to the forwarding address. A total of 87 were returned with no forwarding address and were determined to be undeliverable. In addition, through phone, mail, and email, 10 members of the original survey population reported that they were no longer a business owner or had received duplicate questionnaires. Since those businesses were not contacted

and did not have an opportunity to participate in the survey, they were removed from the original survey sample. Table 2 presents the original survey population, those removed, and the final business survey sample.

**Table 2**  
**Business Survey Population**

Original Population	Municipal, State Federal, Non-Profit Removed	Original Sample	No Contact Removed	Final Survey Sample
587	35	552	97	455

### **Resident Survey Implementation**

The resident survey questionnaire was developed in cooperation with the project's community partners. A draft questionnaire was pre-tested by a group of Piscataquis County area residents representing a variety of demographic characteristics. The pre-test group met with project staff to discuss questionnaire wording, flow, and length. Results from the pre-test were incorporated into the final questionnaire.

The original resident survey mailing was conducted on April 13, 2004. The original mailing (see Appendix 1) included the questionnaire, a cover letter explaining the purpose of the survey, and a postage-paid return envelope. On May 5, 2004, a reminder postcard (see Appendix 1) was mailed to the 662 members of the survey sample who had not returned their questionnaire. On May 24, 2004, a replacement mailing including a cover letter (see Appendix 1), a replacement questionnaire, and a postage-paid return envelope was sent to the 585 members of the survey sample who had not returned the original questionnaire by that date. Completed questionnaires from the original and follow-up mailings were received through July 31, 2004.

Responses from returned, completed questionnaires were entered into a computer data file. The data file was cleaned to reconcile any values out of range. A total of 402 questionnaires were received representing 49.1% of the final survey sample. Table 3 displays the final survey sample and respondents by town.

**Table 3**  
**Resident Survey**  
**Final Sample and Respondents**

Municipality	Final Sample	% of Final Sample	Respondents	% of Respondents
Brownville	87	10.6%	47	11.7%
Dover-Foxcroft	344	42.1%	180	44.8%
Greenville	173	21.1%	75	18.6%
Milo	214	26.2%	100	24.9%
TOTAL	818	100.0%	402	100.0%

While the sample of individuals that returned a completed questionnaire appears to reasonably represent the survey population, respondents may or may not be representative of all people living in the designated Piscataquis County communities.

### **Business Survey Implementation**

The business survey questionnaire was developed in cooperation with the project's community partners. The business survey was similar to the resident survey and two members of the pre-test group also were Piscataquis County business owners. As mentioned above, results from the pre-test were incorporated into the final questionnaire.

The original business survey mailing was conducted on June 10, 2004. The original mailing (see Appendix 2) included the questionnaire, a cover letter explaining the purpose of the survey, and a postage-paid return envelope. On June 24, 2004, a reminder postcard (see Appendix 2) was mailed to the 385 members of the survey population who had not returned their questionnaire. On July 9, 2004, a replacement mailing including a cover letter (see Appendix 2), a replacement questionnaire, and a postage-paid return envelope was sent to the 347 members of the survey sample who had not returned the original questionnaire by that date. Completed questionnaires from the original and follow-up mailings were received through July 31, 2004.

Responses from returned, completed questionnaires were entered into a computer data file. The data file was cleaned to reconcile any values out of range. A total of 207 completed questionnaires were received representing 45.5% of the final survey sample.

While the sample of individuals that returned a completed questionnaire appears to reasonably represent the survey population, respondents may or may not be representative of all businesses in Piscataquis County.

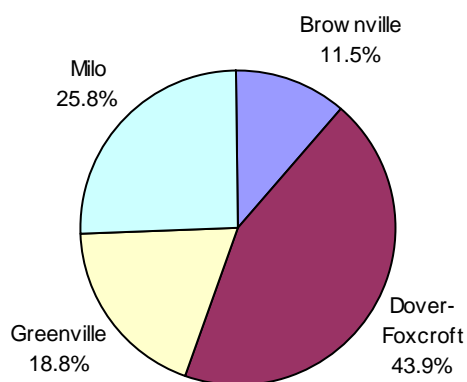
## RESIDENT SURVEY RESULTS

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### RESIDENT RESPONDENT CHARACTERISTICS

The resident survey sample is composed of members of four Piscataquis communities: Brownville, Dover-Foxcroft, Greenville, and Milo. A total of 399 surveys were used for this analysis. The proportion of surveys from each community is roughly representative of the relative size of that community's population. Figure 1 displays the percentage of survey respondents from each community.

**Figure 1**  
**Survey Respondents by Community**  
(n=399)



#### Sex, Age, and Residency

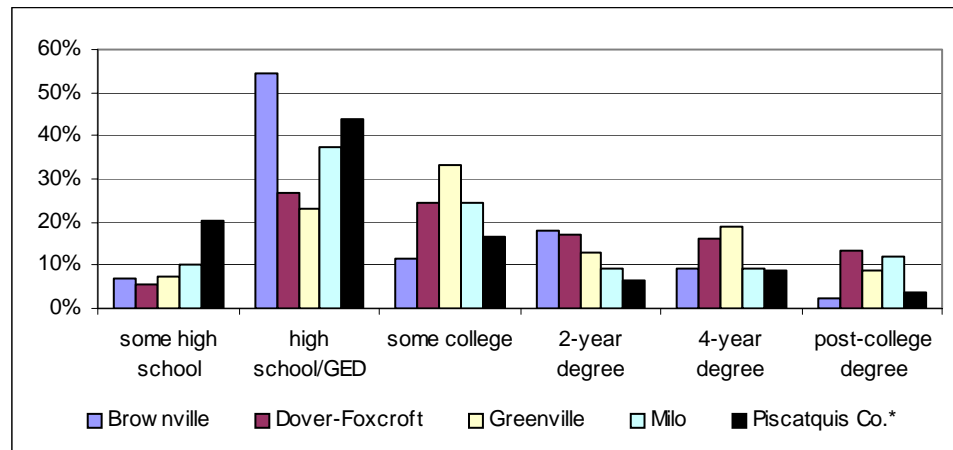
60.2% of survey respondents were female and 39.8% were male. The mean age of all respondents was about 56 years. By community, Brownville had the highest average age, 58.6 years, and Greenville had the lowest, 53.6 years. In addition to their age, respondents were asked to estimate the number of years they had lived in Piscataquis County and in Maine. On average, respondents had lived in Piscataquis for 37.4 years. 71.3% had lived there for at least 20 years, and only 15.9% had lived there for fewer than 10 years. On average, respondents had been in Maine for 45.1 years. 83.3% had been living here for at least 20 years and 8.1% for fewer than 10.

Comparing these data to information from the most recent U.S. Census gives an idea of how the respondents of our survey sample compare to the general population of Piscataquis County. In 1999, the average age of all Piscataquis residents was roughly 40, which suggests that older residents are over represented in our respondent sample (U.S. Census 2000). It is important to note that our survey was limited to four large towns in Piscataquis County whereas the census covered all households in all areas. It is possible that the Piscataquis residents living in these towns have different demographic characteristics than those who live outside of them. This technically limits our ability to compare demographic statistics. Nevertheless, census figures provide a useful point of reference.

## **Education**

Over one-quarter of respondents reported a 4-year college degree or post-college degree as their highest education attainment, 14.0% had a two-year degree, and 23.8% had some college experience but no degree. Compared to U.S. Census figures of the general population of Piscataquis County, more survey respondents had postsecondary degrees. Figure 2 displays the educational attainment of respondents by community.

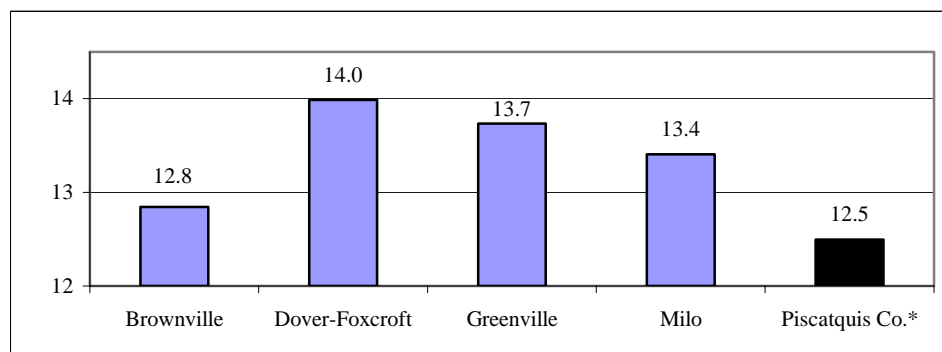
**Figure 2**  
**Educational Attainment by Community**  
(n=387)



\*U.S. Census Bureau 2000

Another way to present these data is to convert the categories of educational attainment in approximate years of schooling. For instance, one can estimate that someone with a high school degree has completed 12 years of schooling. Using this methodology, one can estimate the average years of schooling for respondents from each community. Figure 3 displays these averages.

**Figure 3**  
**Average Years of Education by Community**  
(n=387)

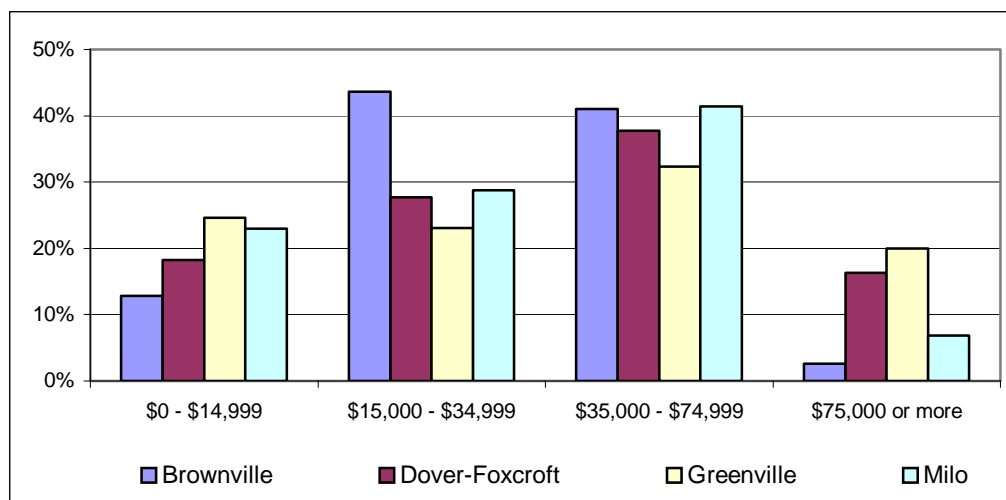


\*U.S. Census Bureau 2000

## Income

The questionnaire provided a series of income categories and asked respondents to indicate which best described their household income during the previous 12 months. Figure 4 displays the proportion of respondents by community who selected each category.

**Figure 4**  
**Respondent Income by Community**  
(n=350)



## Households

Average household size in all communities was 2.6 people, slightly larger than the county average of 2.3 people (U.S. Census 2000). The percentage of respondents living in single-person households varied from 14.3% in Dover-Foxcroft to 25.2% in Milo, compared to 27.7% of all Piscataquis households (U.S. Census 2000). Two-person households ranged from 45.6% in Milo to 54.4% in Brownville, compared to 38.9% for the county (U.S. Census 2000).

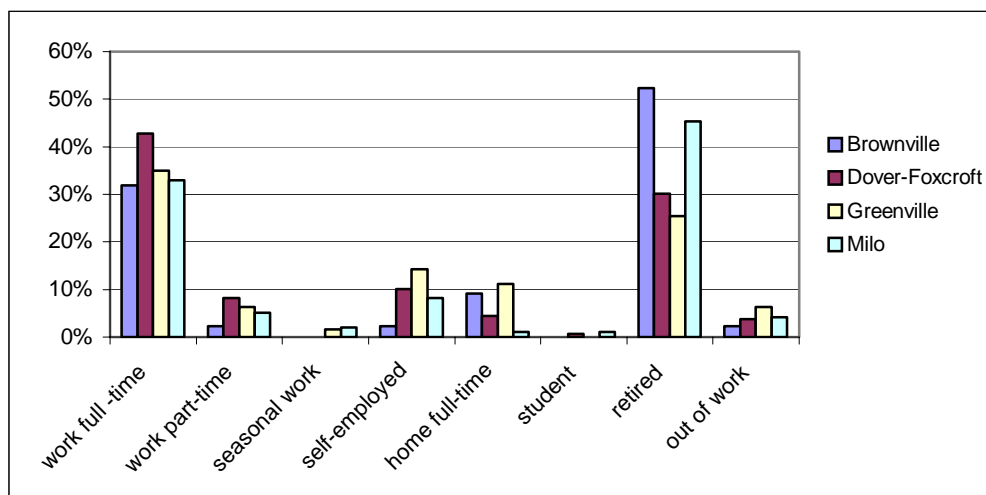
Almost one-quarter (24.1%) of respondents had children age 18 years or younger living in their household. Of those households, just over half (51.0%) had only one child living with them. These percentages are considerably lower than similar data for the general population. In 1999, 30.8% of all Piscataquis households contained a child under age 18 (U.S. Census 2000). This disparity may stem from the relatively higher age of survey respondents. Older individuals may be less likely to have children residing in their household.

## Employment

More than one-third (37.5%) of respondents had full-time employment at the time of the survey, which is comparable to the percentage of Piscataquis residents who reported working full-time in 1999 (U.S. Census 2000). 9.4% of respondents were self-employed and very few (0.8%) were working seasonal jobs. About one-third (36.1%) of survey respondents were retired. The exact number of retirees in Piscataquis is not available. According to census figures, only 17.7% of Piscataquis households reported receiving retirement income in 1999 (U.S. Census 2000). However, that figure does not reflect individuals who may consider themselves “retired” but never paid into a retirement plan, so it is unclear how survey respondents compare the general population.

Figure 5 displays the work status for respondents by community. At least 30% of respondents from all four communities worked full time. Dover-Foxcroft had the most full-time workers, 42.8%. At least 25% of respondents from all four communities were retired. Brownville and Milo had significantly larger retired populations. Over half (52.3%) of Brownville respondents were retired, as were 45.4% of respondents living in Milo.

**Figure 5**  
**Work Status by Community**  
(n=363)



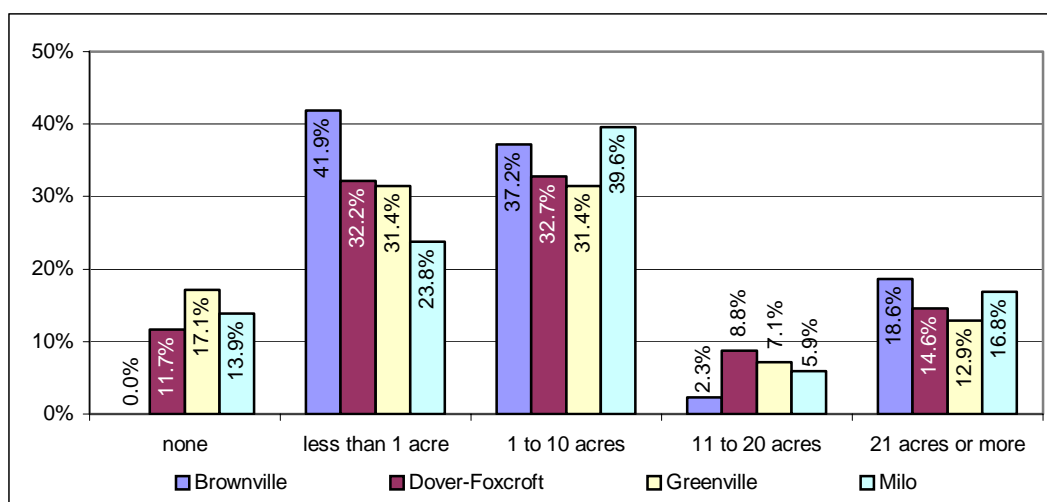
Of those respondents who were working, 79.3% worked in Piscataquis County and 20.7% worked outside the county. 15.0% of all respondents reported owning a business in the county. Business-ownership ranged from 4.4% in Brownville to 28.6% in Greenville.



## Property Ownership

Of 385 respondents, 88.0% reported owning land in Piscataquis County. About one-third (30.9%) owned less than 1 acre, one-third (34.8%) owned 1 to 10 acres and 22.3% owned more than ten acres. Figure 6 shows the distribution of property ownership by community.

**Figure 6**  
**Property Ownership**  
(n=385)



Over one-quarter (27.4%) of respondents reported owning a camp in addition to their primary residence. This percentage did not vary greatly across the four communities.

## Civic Activities

Respondents were asked what kinds of civic activities they had participated in during the previous 12 months. The reported voting rate of survey respondents, 77.7%, is significantly higher than the overall rate observed in elections held in the 12 months before survey distribution. In the November 4, 2003 referendum election (the largest election held in the 12 months prior to survey distribution), only 47.6% of registered voters in Brownville, Dover-Foxcroft, Greenville, and Milo cast a ballot (Maine Secretary of State). The second most frequently reported civic activity was membership in a church group (36.7%), followed by membership in a local civic/fraternal organization (21.4%). Very few respondents (5.2%) were members of an environmental club, 16.5% belonged to sporting/recreation clubs, and 11.8% of respondents participated in an unlisted activity, such as historical societies, volunteer activities, and senior citizens groups.

**Table 4**  
**Civic Activities**  
(n=346)

77.7% Voting
36.7% Member of a church group
21.4% Member of a local civic/fraternal organization
16.5% Member of a sporting/recreation club
10.1% Serve on a town committee
5.2% Member of an environmental club
11.8% Other

### **Outdoor Recreation**

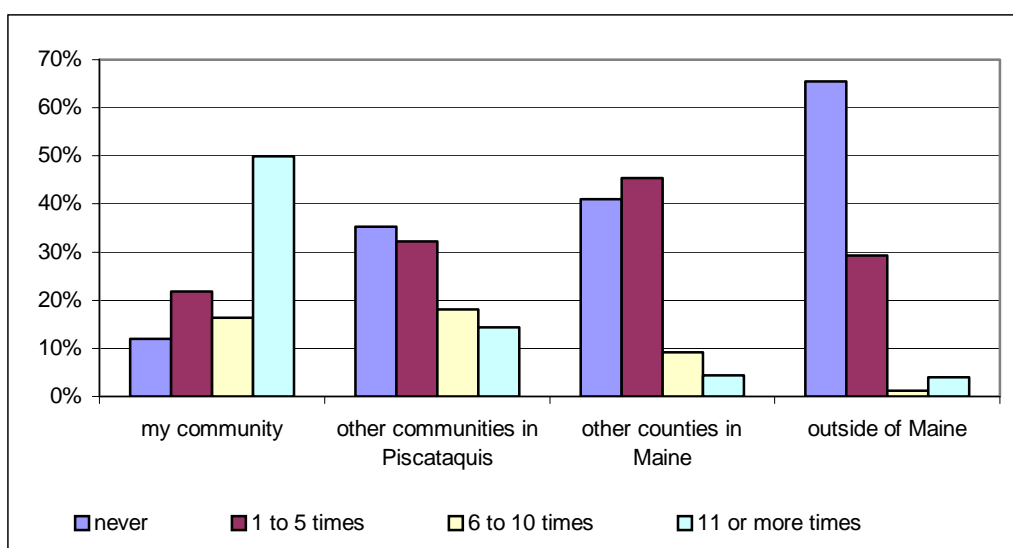
Respondents were asked whether or not they enjoy certain outdoor recreational activities common to that area. The most popular activity was walking (79.8%), followed by camping (52.2%) and fishing (51.3%). Table 5 displays the percentage of respondents who indicated that they enjoy each activity, beginning with the most popular activities.

**Table 5**  
**Outdoor Recreation Activities**  
(n=396)

79.8% Walking	34.8% Snowmobiling	10.9% Mountain biking
52.2% Camping	33.3% Motor boating	10.6% Backpacking
51.3% Fishing	30.1% Ice fishing	8.3% Horseback riding
40.9% Hiking	27.0% Snowshoeing	3.8% Rock climbing
40.2% Bird watching	23.2% Cross-country skiing	1.5% Dog sledding
37.4% Kayaking/canoeing	21.7% ATV riding	
36.9% Hunting	12.9% Downhill skiing	3.5% None of the above

Survey respondents go to a variety of locations to participate in these outdoor recreation activities. Figure 7 displays how often they went to various places during the previous 12 months. Overall, respondents recreated close to home most frequently. Fully 85.5% had recreated within their communities at least once and over half (56.6%) had recreated there 11 or more times. The next most common recreation destination was other communities within Piscataquis County. Over half (56.8%) had traveled to other Maine counties to recreate and 77.1% of them had done so 1-5 times. One-third of respondents had traveled to recreation destinations outside Maine and most of them had done so 1-5 times.

**Figure 7**  
**Outdoor Recreation Destinations**



### Cultural Heritage Activities

“Cultural heritage” is a broad term that refers to an area’s unique history and character, the skills and values of its residents, and venues for displaying those assets. The survey presented respondents with a list of cultural-heritage activities and asked them to indicate which they enjoy. Table 6 displays the percentage of respondents who indicated that they enjoy each activity, beginning with the most popular activities.

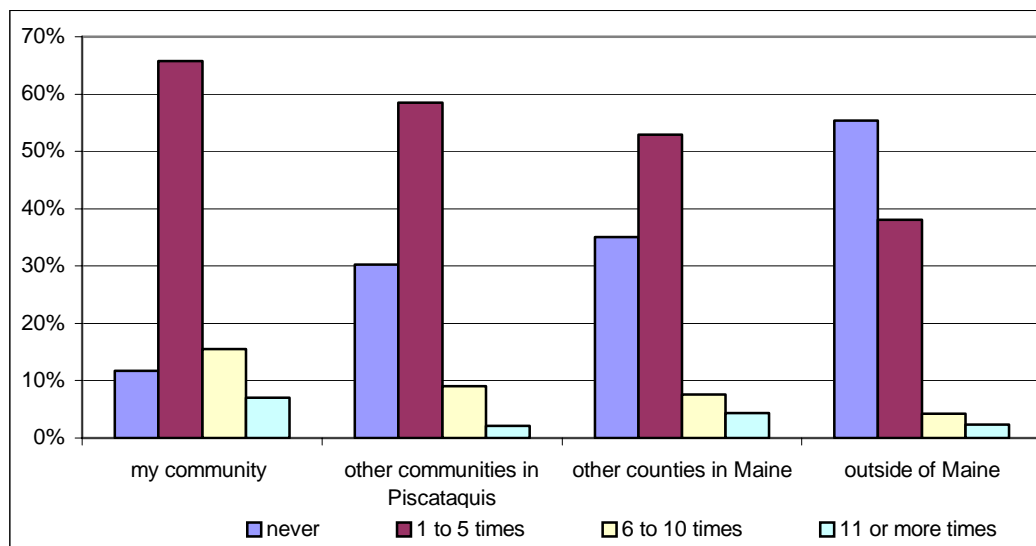
**Table 6**  
**Cultural-Heritage Activities**  
(n=394)

77.2%	Attending public parades, festivals, county fairs, or holiday celebrations
66.8%	Visiting historic sites
59.1%	Attending art or craft fairs
58.9%	Attending live musical performances
50.0%	Visiting museums or galleries
36.5%	Attending auctions
35.0%	Visiting artist or crafter studios
31.5%	Attending recreation or sporting events (fishing derbies, bike races, etc.)
3.8%	None of the above

As with recreation activities, Piscataquis residents could pursue cultural-heritage activities at a variety of locations. Figure 8 illustrates how often respondents pursued the above cultural activities at various locations. As with recreational activities, respondents engaged in these activities within their own communities more often than in other locations. However, compared to recreational activities, respondents pursued cultural activities fewer times in their home communities.

Whereas roughly half of respondents had participated in recreational activities in their home community more than ten times in the last year, less than 10% had done the same for cultural-heritage activities. Only about one-third of respondents had pursued recreational activities in their home community fewer than six times during the last year. More than twice as many (76.6%) had pursued cultural activities in their home community fewer than six times. In general, respondents seem to travel for cultural-heritage activities slightly more frequently than for outdoor recreation. During the previous year, 44.0 % of respondents engaged in a cultural activity outside of Maine at least once, compared to 33.9% for recreational pursuits.

**Figure 8**  
**Cultural-Heritage Activity Destinations**



### **Location Decisions**

People consider a variety of factors when choosing where to live. Respondents were presented with a list of community characteristics and asked to indicate how important each characteristic was to them in terms of where they chose to live. Table 7 displays responses for residents of all communities. Over 98% of respondents indicated that clean air and water were either important or very important to their location decision. 96.5% indicated the same for low crime rate and 92.1% valued the overall characteristic of being a “good place to raise a family.” Characteristics that respondents felt were less important include: good entertainment opportunities, strong cultural heritage, and access to adult education.

**Table 7**  
**Importance of Location Characteristics**

	Percentage of respondents who indicated “very important”				
	Entire Sample (n=399)	Brownville (n=46)	Dover-Foxcroft (n=175)	Greenville (n=75)	Milo (n=103)
Clean air and water	75.9%	87.0%	72.8%	78.7%	73.3%
Good place to raise a family	73.0%	69.6%	75.7%	65.8%	75.5%
Low crime rate	70.4%	67.4%	68.8%	71.2%	73.8%
Lots of open space	57.4%	65.1%	54.4%	69.0%	51.5%
Good local schools	57.0%	40.0%	62.6%	58.3%	54.0%
Pleasant natural setting	51.8%	58.7%	48.8%	58.1%	49.0%
Good local job opportunities	51.0%	45.7%	49.7%	51.4%	55.6%
Low cost of living	44.5%	56.5%	40.0%	39.7%	50.0%
Good outdoor recreation opportunities	44.4%	46.7%	41.1%	58.1%	38.8%
Lots of privacy from neighbors	36.5%	32.6%	32.4%	40.5%	42.6%
Strong sense of community	34.8%	37.8%	30.4%	40.3%	37.1%
Access to adult education	26.8%	26.1%	24.7%	32.9%	26.3%
Strong local cultural heritage	20.2%	17.9%	21.8%	18.3%	24.1%
Good entertainment opportunities	11.9%	11.1%	14.8%	4.3%	12.6%

Respondents from households with at least one resident under age 18 were more likely to name “good place to raise a family” and “good local schools” as very important factors, and less likely to choose “strong local cultural heritage” and “good entertainment opportunities” as very important.

## NATURE-BASED TOURISM

One goal of this survey was to ascertain how residents of Piscataquis County feel about the growth of tourism in their communities. Questions centered around two forms of tourism: nature-based tourism and cultural-heritage tourism. “Nature-based tourism” involves attracting visitors who seek to pursue outdoor recreation activities such as snowmobiling, skiing, hiking, fishing, etc. Nature-based tourism currently constitutes the bulk of Piscataquis County’s tourism economy.

### Nature-Based Tourism Development Strategies

Business and municipal leaders could pursue several strategies to increase the number of visitors seeking outdoor recreation experiences in Piscataquis County. The survey presented five prospective strategies and respondents ranked their level of support for each strategy.

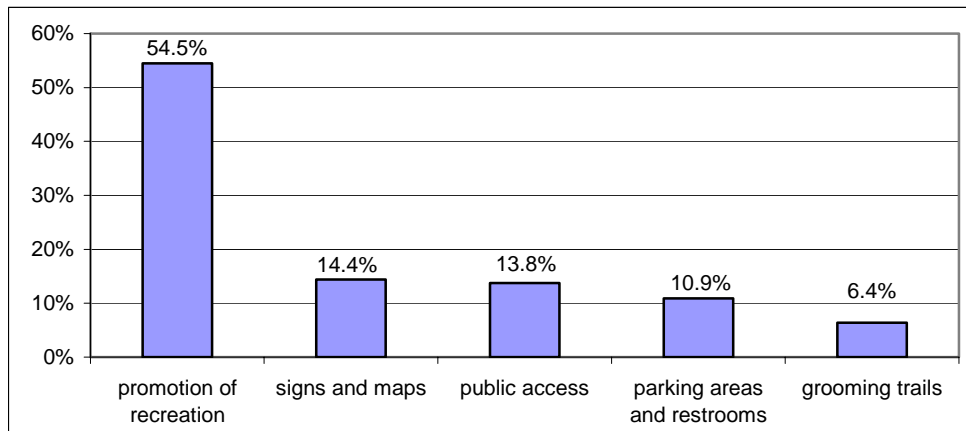
As shown in Table 8, respondents generally supported all five strategies. Over 75% of respondents either supported or strongly supported increasing promotion of outdoor recreation opportunities and increasing signs and maps to direct tourists to recreation sites. 70.4% supported securing public access to boat launches on local waterways. Over half supported increasing grooming of snowmobile trails through user fees (52.0%) and/or building parking areas and providing restrooms at recreation sites (66.2%). The grooming of snowmobile trails through user fees is the only strategy that over 10% of respondents opposed.

**Table 8**  
**Support for Nature-Based Tourism Development Strategies**

	strongly support	support	neutral	oppose	strongly oppose	don't know
Increase promotion of outdoor recreation opportunities (n=380)	39.2%	42.4%	10.5%	3.7%	2.1%	2.1%
Increase signs and maps to direct tourists to recreation sites (n=381)	31.8%	43.6%	15.5%	4.2%	2.6%	2.4%
Secure public access to boat launches on local waterways (n=381)	28.3%	42.1%	18.1%	5.0%	1.8%	4.5%
Build parking areas and provide restrooms at recreation sites (n=382)	26.7%	39.5%	21.5%	7.1%	2.6%	2.6%
Increase grooming of snowmobile trails through user fees (n=381)	23.1%	28.9%	29.6%	8.9%	4.2%	5.2%

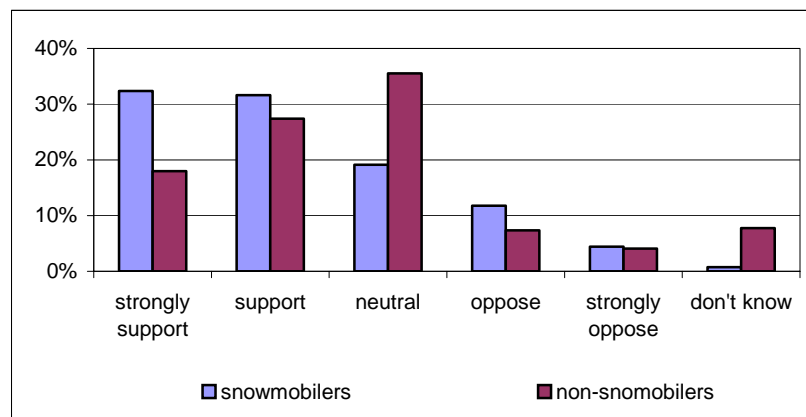
When asked which strategy is most important for Piscataquis County, over half of respondents chose the option of promoting outdoor recreation opportunities. Figure 9 displays the percentage of “most important” votes for each strategy.

**Figure 9**  
**Most Important Nature-Based Tourism Development Strategy**  
 (n=312)



Few respondents believed that increased grooming of snowmobile trails through the use of trail fees is an important economic development tool for the county. However, it is interesting to note that respondents who indicated that they enjoyed snowmobiling appeared more likely than non-snowmobilers to support or strongly support increased grooming of snowmobile trails through the use of trail fees (63.0% versus 43.0%).

**Figure 10**  
**Support for Increased Grooming of Snowmobile Trails Funded by User Fees**  
**by Snowmobile Use**  
 (n=381)



## **Growth of Nature-Based Activities**

As previously discussed, a majority of respondents feel that promotion of outdoor recreation opportunities is an important priority for Piscataquis County. Throughout its history, the county's natural setting has provided residents and visitors with a variety of outdoor activities. Today, the region is particularly popular destination for snowmobiling in winter, and is a gateway for campers and hikers drawn to Moosehead Lake and Baxter State Park in warmer months. Respondents indicated how they would like the current level of certain outdoor recreation activity to change in coming years. Table 9 shows their responses.

**Table 9**  
**Preferred Growth of Nature-Based Activities**

	increase	stay the same	decrease	don't know
Camping and hiking (n=375)	59.2%	32.5%	0.8%	7.5%
Cross-country skiing (n=379)	53.3%	30.1%	0.8%	15.8%
Kayaking and canoeing (n=371)	50.4%	36.1%	0.8%	12.7%
Snowshoeing and dog sledding (n=370)	42.4%	39.2%	2.2%	16.2%
Snowmobiling (n=375)	25.6%	49.3%	15.7%	9.3%
ATV riding (n=377)	18.0%	30.5%	39.3%	12.2%
Motor boating (n=375)	16.3%	53.1%	18.7%	12.0%

In general, respondents felt more favorably toward increases in non-motorized activities than motorized ones. Over half of respondents would like to see increases in current levels of camping and hiking (59.2%), cross-country skiing (53.3%), and kayaking and canoeing (50.4%). Of over 370 respondents, only 3 indicated that they would like to see less of those activities. Almost half of respondents (49.3%) want snowmobiling to remain at its current level, while 25.6% wanted it to increase, and 15.7% wanted it to decrease. ATV-riding is the only activity that a plurality of respondents (39.3%) would like to see decrease in coming years. Only 18.0% want ATV-riding to increase, and 30.5% prefer it to remain at the current level.

Support for the nature-based activities differs by community. For instance, residents of Brownville are slightly less supportive of increases in cross-country skiing than residents of Dover-Foxcroft, Greenville, and Milo (37.2% versus 58.7%, 58.9%, and 52.0% respectively). On the other hand, they are the most supportive of increases in snowmobiling (36.4% compared to 18.6%, 30.0%, and 29.0%) and ATV riding (29.5% compared to 14.7%, 16.9%, and 19.0%).

Only 9.4% of Dover-Foxcroft respondents would like to see increased motor boating in coming years. In fact, almost one in four want motor boating to decrease. Greenville residents are the most amenable to boating increases; 26.8% would like to see more boating and 11.3% would like less.

For all activities, respondents who indicated that they enjoy the activity in question were roughly twice as likely to support its increase and half as likely to support a decrease. The exception is ATV-riding; 51.2% of riders support an increase in ATV use, compared to only 8.8% of non-riders. Conversely, only 7.4% of riders want to see less riding in the future, compared to 48.0% of non-riders.



## CULTURAL-HERITAGE TOURISM

In addition to nature-based tourism, Piscataquis County could develop cultural-heritage tourism. “Cultural heritage” is a broad term that refers to an area’s unique history and character, the skills and values of its residents, and venues for displaying those assets. Cultural-heritage attractions include museums, theaters, galleries, historic sites, fairs, and festivals. They can also be less publicized assets such as the traditional skills of local crafters, artists, skilled-workers, and tradesmen. Promoting a community’s unique cultural-heritage can potentially attract visitors and new residents. It is important to note that survey respondents may have interpreted “cultural heritage” differently.

### Cultural-Heritage Tourism Development Strategies

As with nature-based tourism, promoters of cultural-heritage could pursue several different strategies of development. For instance, community leaders could work to bring more artists and crafters into the area on a temporary basis for festivals and fairs or they could help those people relocate to the area and establish permanent studios. Respondents indicated their support for several strategies that could be used to promote cultural-heritage opportunities and attractions in Piscataquis County. Table 10 displays their responses.

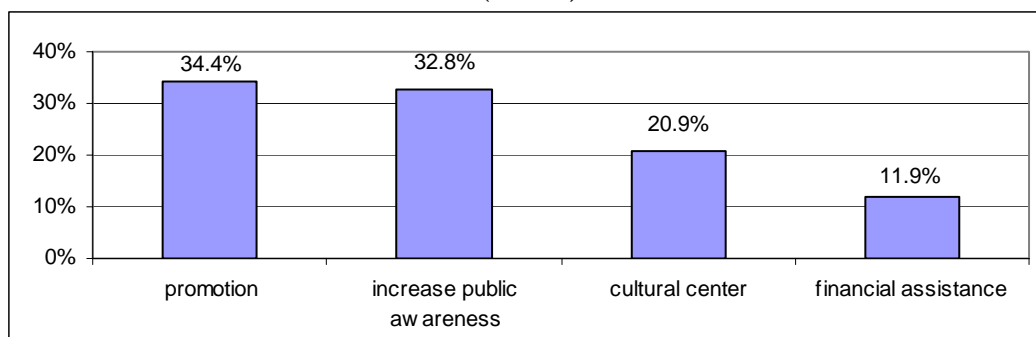
**Table 10**  
**Support for Cultural-Heritage Tourism Development Strategies**

	strongly support	support	neutral	oppose	strongly oppose	don't know
Promote the area's history and culture to attract more tourists (n=377)	31.6%	41.6%	16.4%	4.0%	1.6%	4.8%
Increase public awareness of the area's history, arts, and traditional crafts (n=370)	32.4%	45.7%	14.3%	2.2%	1.1%	4.3%
Open a regional cultural center such as a theater or museum (n=375)	24.0%	34.7%	27.2%	5.6%	2.4%	6.1%
Provide financial help to artists and crafters who want to start a business (n=367)	15.5%	28.6%	35.4%	10.6%	4.1%	5.7%

In general, respondents either supported or felt neutrally toward all of the proposed strategies. Increasing public awareness of the area’s history, arts, and traditional crafts received the most support as a strategy for attracting more visitors to the county. Over three-fourths of respondents supported or strongly supported that strategy. Nearly as many (73.2%) have similar support for promoting the area’s history and culture. Of the proposed strategies, respondents were least supportive of providing financial assistance to artists and crafters who want to start small businesses in the area. While 44.1% supported or strongly supported the idea, 14.7% opposed or strongly opposed it. That rate of opposition was the highest for any strategy.

Respondents were split when asked which of the proposed strategies is most important for Piscataquis County. As shown in Figure 11, roughly one-third (34.4%) chose promoting the area’s history and culture, and another one-third (32.8%) chose increasing public awareness of the area’s history and culture.

**Figure 11**  
**Most Important Cultural-Heritage Tourism Development Strategy**  
(n=302)



Support for the less popular choices varied considerably by community. In Brownville, only 2.78% (one respondent) chose a regional cultural center as most important, significantly fewer than respondents from Dover-Foxcroft (23.9%), Greenville (25.9%), and Milo (20.3%). On the other hand, financial help to local artisans was selected less often by Greenville residents (5.2%), than residents of Brownville (16.7%), Dover-Foxcroft (13.4%), and Milo (12.2%).

### **Growth of Cultural-Heritage Activities**

Each community's cultural heritage is unique and towns may choose to promote certain aspects of their heritage more than others. For instance, some communities market themselves around a certain craft, food, or historic site. Table 11 displays the degree to which respondents want the level of various cultural activities in their communities to change in coming years.

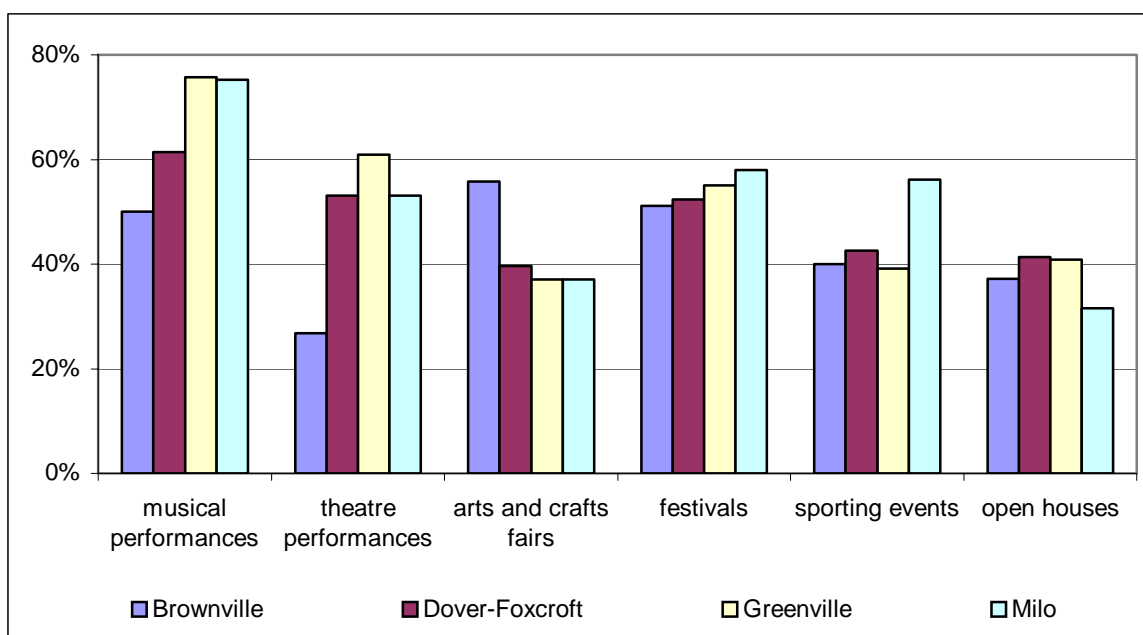
**Table 11**  
**Preferred Growth of Cultural-Heritage Activities**

	increase	stay the same	decrease	don't know
Live musical performances (n=381)	66.4%	21.0%	2.1%	10.5%
Local festivals (n=378)	54.2%	36.5%	2.1%	7.1%
Live theatre performances (n=368)	51.6%	29.6%	2.7%	16.0%
Local sporting events (n=374)	45.2%	42.0%	3.2%	9.6%
Arts and crafts fairs (n=374)	40.4%	50.0%	1.9%	7.8%
Open houses at art and craft studios (n=374)	38.2%	46.3%	2.4%	13.1%

Over half of respondents would like to see more festivals (54.2%) and live musical and theatre performances (66.4% and 51.6%) in coming years. Nearly as many (45.2%) would like more local sporting events. A majority of respondents (50.0%) want the number of arts and crafts fairs to remain the same, although 40.4% would like it to increase. Similarly, 46.3% of respondents would like to maintain the current level of open houses at art and craft studios while 38.2% would like it to increase.

Support for increases of some activities varied by community, as shown below in Figure 12. Respondents from Brownville were uniquely supportive of arts and crafts fairs, and uniquely less supportive of theatre performances. Greenville and Milo respondents strongly desired increases in live musical and theatre performances and did not desire more arts and crafts fairs. In general, no group of respondents displayed significant opposition to the growth of any cultural activity listed. The strongest desire for decreased levels of activity were reported by residents of Brownville for local festivals (4.4%) and Milo for local sporting events and open houses (6.1% and 7.1% respectively).

**Figure 12**  
**Support for Increases of Cultural-Heritage Activities**  
**by Community**



## EFFECTS OF TOURISM

Communities that attract tourists and seasonal residents experience both benefits and challenges from increased visitation. Tourism can benefit local businesses, increase employment opportunities, and raise property values. Simultaneously, certain aspects of tourism may have negative effects, such as reliance on seasonal business and employment, strain on local infrastructure, and threats to natural resources. The survey sought to learn how residents feel about tourism's potential to benefit themselves and their community, to what degree they would like the current level of tourism to increase or decrease, and what steps they would take to reach that desired level.

### Economic Effects of Tourism

Respondents were presented with several statements characterizing the economic aspects of tourism and were asked to indicate the extent to which they agree or disagree with the statements. Table 12 displays the frequency of responses.

**Table 12**  
**Perceptions of Economic Aspects of Tourism**

	strongly agree	agree	neutral	disagree	strongly disagree	don't know
Tourism provides mostly low-paying, seasonal jobs (n=381)	18.4%	45.7%	12.3%	14.2%	2.8%	6.6%
Most of the businesses involved in tourism are small (n=383)	17.0%	55.9%	7.6%	9.7%	2.1%	7.8%
Tourism does not provide the kinds of jobs our area needs (n=381)	16.5%	29.4%	16.0%	26.0%	7.3%	4.7%
Tourism contributes to local tax revenues, thus lowering local tax bills (n=385)	11.9%	34.0%	17.4%	16.4%	7.3%	13.0%
Tourism increases the local cost of living (n=382)	9.9%	19.9%	22.3%	30.1%	4.7%	13.1%
Tourism only helps businesses that sell directly to tourists (n=377)	5.6%	19.9%	11.9%	45.9%	10.6%	6.1%

A majority of respondents (72.9%) agreed or strongly agreed that businesses involved with tourism are small. Despite that perception, most respondents seemed to believe that tourism benefits the area's economy. 56.5% disagreed with the statement "tourism only helps businesses that sell directly to tourists." However, one in four (25.5%) respondents who owned a business agreed or strongly agreed with that statement.

Respondents indicated mixed perceptions of tourism's ability to produce desirable employment opportunities. Almost half agreed that "tourism does not provide the kinds of jobs our area needs." One-third of respondents disagreed with that statement. There is more consensus on the characteristics of the jobs that tourism creates. Roughly two-thirds of respondents view the jobs provided by tourism as being "mostly low-paying, seasonal jobs."

Respondents had mixed perceptions of the effect of tourism on their personal expenses. Almost half (45.9%) agreed that tourism “contributes to local tax revenues, thus lowering local tax bills,” while 23.7% disagreed. 29.8% felt that tourism increases the local cost of living, but a larger percentage, 34.8%, did not perceive such an increase.

Survey respondents who own businesses in Piscataquis County answered some of the above questions differently than those who do not own businesses. Note that these respondents are not the business operators to whom a similar survey was distributed; they are residents who happened to own businesses (although it is possible that a business operator living in one of the four communities could also have received a resident survey). The responses of business operators to the business survey can be found in the next section of this report.

As shown in Table 13, residents who own businesses were considerably more likely to strongly agree that tourism-related businesses are small and fail to provide the kinds of jobs that the area needs. On the other hand, residents who owned a business were less likely to strongly agree that “tourism provides mostly low-paying, seasonal jobs.” Residents who were business owners were almost twice as likely to strongly agree that tourism lowers local tax bills by contributing to local tax revenues. Slightly more resident businesses owners than non-business owners strongly agreed that tourism increases the local cost of living.

**Table 13**  
**Perceptions of Economic Aspects of Tourism**  
**by Business-Ownership Status\***

	Percentage of respondents who indicated “strongly agree”	
	Business Owners* (n=58)	Business Non-Owners* (n=329)
Tourism provides mostly low-paying, seasonal jobs	13.7%	19.4%
Most of the businesses involved in tourism are small	24.1%	15.1%
Tourism does not provide the kinds of jobs our area needs	23.2%	15.5%
Tourism contributes to local tax revenues, thus lowering local tax bills	19.0%	10.7%
Tourism increases the local cost of living	15.5%	9.2%
Tourism only helps businesses that sell directly to tourists	5.4%	5.7%

\* “Business Owners” refers to the resident survey respondents who happened to own a business, not the business operators who were surveyed separately from residents. Survey results for business operators are in the next section of this report.

## **Social and Environmental Effects of Tourism**

In addition to tourism's effect on a region's economy, large influxes of visitors and seasonal residents can affect an area's social and environmental character. Hence, a decision to promote tourism as an economic development tool can have far-reaching and sometimes unexpected consequences. The survey presented respondents with several statements regarding the social and environmental influences of tourism. Table 14 displays the extent to which respondents agreed or disagreed with the statements.

**Table 14**  
**Perceptions of Social and Environmental Aspects of Tourism**

	strongly agree	agree	neutral	disagree	strongly disagree	don't know
Tourism provides services/activities we wouldn't otherwise have (n=383)	14.1%	48.3%	16.4%	14.4%	1.0%	5.7%
Tourist attractions/facilities improve a community's appearance (n=378)	9.5%	53.2%	20.6%	9.8%	2.4%	4.5%
Tourism makes the area more crowded and threatens privacy (n=381)	8.1%	30.4%	23.4%	31.2%	3.1%	3.7%
Tourism reduces the quality of outdoor recreation opportunities due to overuse and crowding (n=382)	7.9%	23.3%	22.3%	37.7%	2.9%	6.0%
Tourists and local residents get along with each other (n=384)	7.3%	53.1%	27.1%	7.8%	0.5%	4.2%
Tourism facilities will restrict my access to area lakes, forests and open spaces (n=382)	7.1%	16.5%	21.2%	41.6%	4.7%	8.9%
Environmental impacts from tourism are relatively minor (n=382)	4.2%	34.8%	17.5%	30.1%	6.0%	7.3%
Tourism increases crime (n=383)	3.7%	19.6%	23.0%	40.2%	2.6%	11.0%

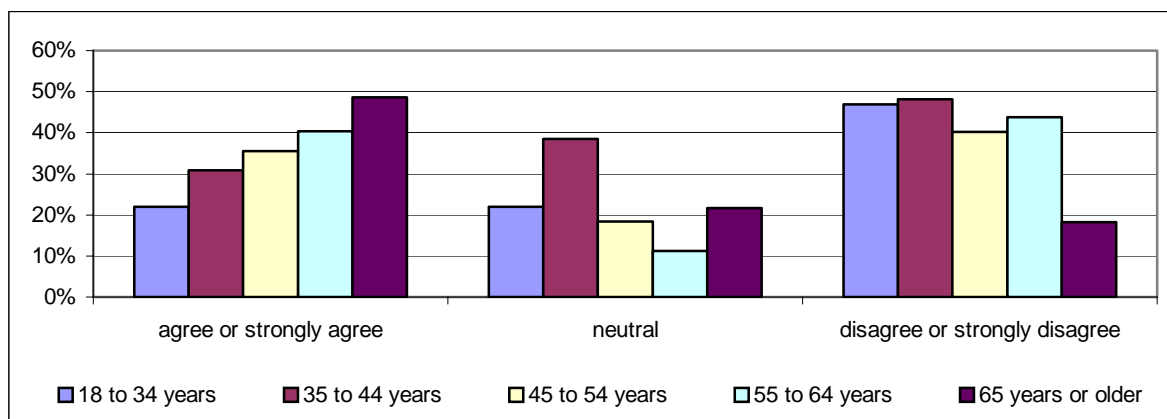
Well over half of respondents (62.4%) believe that tourism provides services and activities that the area wouldn't otherwise have. That perception seems to influence the degree to which they want their town to become a tourism destination. As displayed in Table 15, respondents who strongly agreed that tourism provides extra services/activities were twice as likely to want their town to become a primary tourist destination rather than a minor or non-destination. On the other hand, only 7.4% of respondents who did not see tourism as increasing services/activities wanted their town to become a primary destination; 18.6% preferred to be a minor destination and 28.3% preferred not to be a tourist destination.

**Table 15**  
**Desired Level of Tourism**  
**by Perceived Increase in Services/Activities**

Respondents who would like their town to be a...	Tourism provides services/activities we wouldn't otherwise have...					
	strongly agree	agree	neutral	disagree	strongly disagree	don't know
Primary tourist destination (n=149)	20.8%	55.0%	14.8%	6.7%	0.7%	2.0%
Minor tourist destination (n=172)	9.3%	50.6%	16.3%	18.6%	0.0%	5.2%
Not a tourist destination (n=53)	11.3%	26.4%	22.6%	22.6%	5.7%	11.3%

Respondents were split on their perception of the environmental impact of tourism. Roughly equal portions (39.0% and 36.1%) agreed and disagreed with the statement “environmental impacts from tourism are relatively minor.” Differences of opinion may reflect respondents’ ages. As displayed in Figure 13, younger respondents were considerably less likely than older residents to view environmental impacts as minor. Of respondents age 65 or older, only 18.3% disagreed with the statement, compared to 43.8% of respondents under age 65.

**Figure 13**  
**Perception of Environmental Impact of Tourism as Minor by Age**



The survey presented respondents with several specific statements about the potential effects of increased tourism on life within Piscataquis County. Table 16 lists these statements and respondents’ answers. Although agreement on the statements varied considerably, several points of consensus emerged. Over 90% of respondents either agreed or strongly agreed that tourism will increase sales to local businesses. Other points of consensus are the potentially opposing statements that tourism will increase in-migration by new residents (61.2% agreed) and will preserve local cultural and heritage (55.0% agreed).

A majority of respondents (56.3%) felt that increased tourism would improve job opportunities in Piscataquis County. This sentiment seems to contradict earlier responses in which 45.9% of respondents indicated that tourism “does not provide the kinds of jobs our area needs.” Respondents may feel that the creation of tourism-related job opportunities would improve current opportunities but still not provide the type of employment that the county needs.

**Table 16**  
**Projected Effects of Tourism in Piscataquis County**

Increased tourism in Piscataquis County will:	strongly agree	agree	neutral	disagree	strongly disagree	don't know
Increase sales to local businesses (n=384)	24.7%	65.6%	4.4%	2.1%	0.3%	2.9%
Preserve local culture and heritage (n=380)	10.8%	44.2%	20.5%	16.1%	1.3%	7.1%
Improve job opportunities (n=385)	10.1%	46.2%	16.9%	18.2%	3.6%	4.9%
Improve the overall quality of life of residents (n=374)	9.6%	32.4%	27.8%	18.7%	3.5%	8.0%
Preserve land and natural resources (n=374)	9.4%	31.8%	20.6%	25.7%	4.3%	8.3%
Result in over development of land (n=372)	9.1%	29.8%	24.5%	24.2%	2.4%	9.9%
Increase in-migration by new residents (n=381)	8.7%	52.5%	20.5%	6.3%	1.0%	11.0%
Improve local municipal services (n=383)	5.7%	30.8%	28.7%	19.8%	2.6%	12.3%

## **Land Use**

Increasing the level of tourism in Piscataquis County could affect the way that land and natural resources are used. In addition to the environmental impacts of increased human activity, communities may face important land-use decisions that influence their character as a tourist destination and affect their appeal to potential visitors. The development of new businesses or residences can change the character of a community and potentially diminish its appeal to tourists. Some communities take precautionary steps to protect undeveloped land and sites of natural or historic interest.

Table 17 displays residents’ support for four land management policies. In general, a majority of respondents from all four communities were supportive of policies to manage development near to snowmobile trails, lakes and waterways, historic sites, and hiking trails.

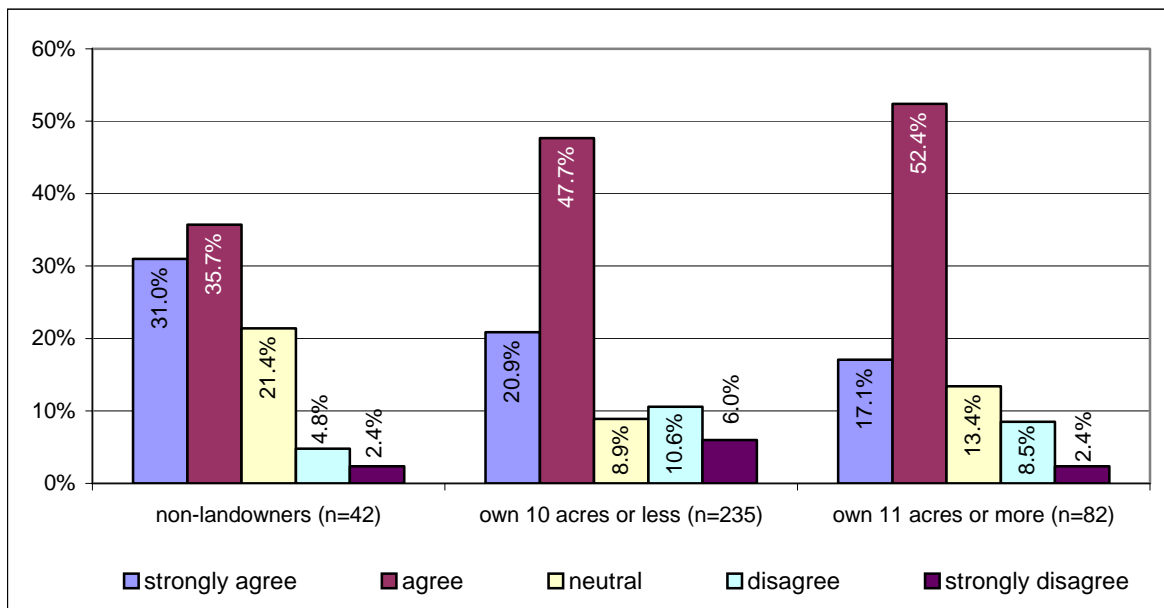


**Table 17**  
**Support for Managed Development**

	Percentage of respondents who “support” or “strongly support”				
	Entire Sample	Brownville	Dover-Foxcroft	Greenville	Milo
	(n=399)	(n=46)	(n=175)	(n=75)	(n=103)
Manage residential and commercial development on land near to....					
Historic sites	68.9%	70.0%	70.8%	70.1%	64.2%
Lakes and waterways	67.8%	65.9%	72.7%	68.6%	59.8%
Hiking trails	65.1%	70.0%	66.7%	68.7%	57.9%
Snowmobile trails	53.0%	61.9%	53.1%	55.7%	46.9%

Figure 14 shows the relationship between respondents’ landownership status and support for management of residential and commercial development near lakes and waterways. The percentage of respondents who strongly support management decreases as land holdings increase, from 31.0% for non-landowners to 17.1% for respondents who own 11 or more acres. However, the overall number who either supported or strongly supported management increases slightly with land holdings, from 66.7% for non-landowners to 69.5% for owners of 11 or more acres.

**Figure 14**  
**Support for Managed Development Near Lakes and Waterways**  
**by Property Ownership Status**



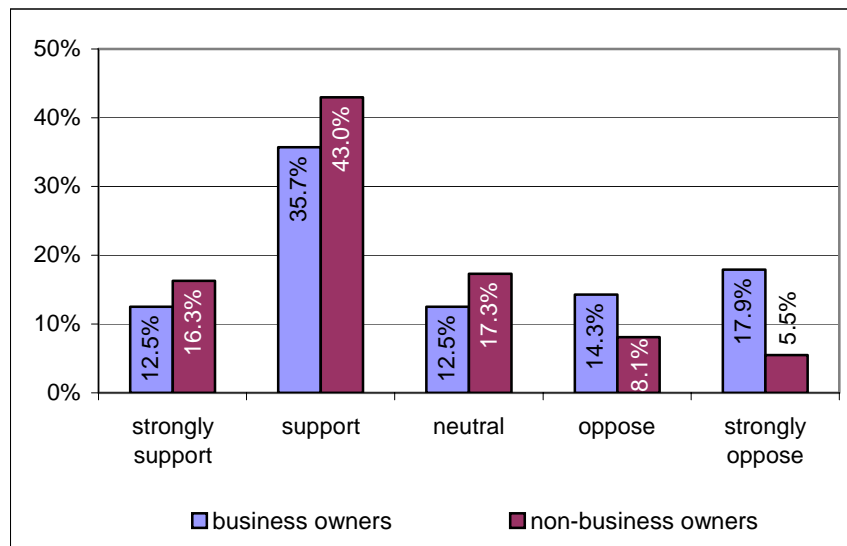
In addition to managing development near certain sites, trails, and natural resources, communities could choose to restrict development in order to preserve public access to certain valuable recreation areas. As shown in Table 18, at least 50.0% of respondents from each community supported the protection of land through local zoning. In Brownville, Dover-Foxcroft, and Milo, this policy was much more popular than outright land purchases or conservation easements. Greenville residents favored conservation easements over the other two policies.

**Table 18**  
**Support for Land Protection**

	Percentage of respondents who “support” or “strongly support”				
	Entire Sample	Brownville	Dover-Foxcroft	Greenville	Milo
Protect land for public recreation use through...	(n=399)	(n=46)	(n=175)	(n=75)	(n=103)
Local zoning	57.8%	59.5%	63.9%	51.5%	51.0%
Conservation easements	46.4%	46.3%	46.5%	60.3%	36.2%
Outright purchases	41.1%	43.9%	43.0%	51.5%	29.0%

Figure 15 displays the percentage of respondents, by business-ownership status, who support local zoning. Almost half of respondents who own businesses in Piscataquis County (48.2%) either supported or strongly supported zoning compared to 59.3% of non-business owners. A substantially larger proportion of residents who owned businesses were against zoning compared to those who did not own businesses. Nearly one-third either opposed or strongly opposed the idea, compared to just 13.6% of non-business owners.

**Figure 15**  
**Support for Land Protection through Local Zoning**  
**by Business Ownership Status\***



\* “Business Owners” refers to the resident survey respondents who happened to own a business, not the business operators who were surveyed separately from residents. Survey results for business operators are in the next section of this report.

Recreational trail systems are currently an important asset to the tourism industry in Piscataquis County. Issues regarding the use of these trails by motorized and non-motorized vehicles have arisen in many communities. Table 19 shows that roughly one-third to one-half of respondents from all communities supported trail systems exclusively for motorized use. At least half supported trail systems exclusively for non-motorized use. Roughly 40-50% of respondents indicated support for mixed-use trails.

**Table 19**  
**Support for Trail Systems by Community**

Support trail systems that are....	Percentage of respondents who "support" or "strongly support"				
	Entire Sample (n=399)	Brownville (n=46)	Dover-Foxcroft (n=175)	Greenville (n=75)	Milo (n=103)
Exclusively for non-motorized use	56.6%	50.0%	56.3%	56.3%	54.3%
Mixed non-motorized and motorized use	44.3%	42.5%	39.6%	47.9%	50.0%
Exclusively for motorized use	39.2%	48.8%	39.9%	36.4%	35.9%

Support for the three types of trail systems differed according to the recreational activities of the respondent. Individuals who enjoy snowmobiling and/or ATV riding generally supported all three types of trail systems. As shown in Table 20, non-snowmobilers and non-ATV riders were less likely to support trail systems exclusively for motorized use and trails for mixed non-motorized and motorized use.

**Table 20**  
**Support of Trail Systems by Snowmobile and ATV Use**

Support trail systems that are....	Percentage of respondents who "support" or "strongly support"			
	snowmobilers (n=138)	non-snowmobilers (n=258)	ATV riders (n=82)	non-ATV riders (n=314)
Exclusively for non-motorized use	50.0%	60.2%	50.7%	58.2%
Mixed non-motorized and motorized use	54.5%	38.3%	63.8%	38.8%
Exclusively for motorized use	54.0%	31.1%	61.0%	33.2%

In addition to managing and protecting natural resources and outdoor facilities such as trail systems, efforts to increase tourism could incorporate physical structures and historic building within a community. As shown in Table 21, survey respondents displayed strong support for the preservation of historic sites and buildings. Fully three-fourths (74.4%) of respondents supported or strongly supported the restoration of historic buildings, making it the most popular strategy of those presented in the questionnaire. A strong majority of respondents (59.7%) supported historic zoning. Standards for new buildings also received over 50% support. This is consistent with previous responses, such as 68.9% support for managed development near historic sites (slightly higher than for management near recreation resources).

**Table 21**  
**Support for Cultural-Heritage Resource Protection**

	Percentage of respondents who "support" or "strongly support"				
	Entire Sample	Brownville	Dover-Foxcroft	Greenville	Milo
Protect cultural-heritage resources through....	(n=399)	(n=46)	(n=175)	(n=75)	(n=103)
Restoration of historic buildings	74.4%	72.5%	76.4%	78.3%	69.1%
Historic zoning	59.7%	61.9%	62.1%	59.1%	53.8%
Standards for new buildings	54.9%	50.0%	57.4%	56.7%	51.6%

## FUTURE OF TOURISM IN PISCATAQUIS COUNTY

### Tourism-Based Economic Development Strategies

Respondents indicated their support for seven strategies of tourism-based economic development. Unlike strategies proposed in previous questions, these tactics do not favor nature-based or cultural-heritage tourism; they are general development strategies. Table 22 shows the degree to which respondents supported or opposed the strategies.

**Table 22**  
**Support for Tourism-Based Economic Development Strategies**

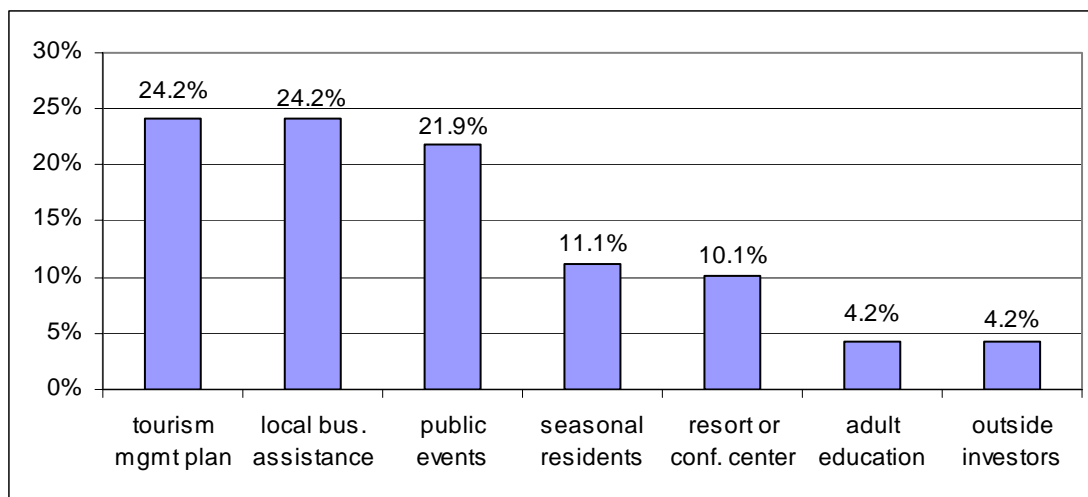
	strongly support	support	neutral	oppose	strongly oppose	don't know
Develop a county-wide tourism management plan (n=373)	18.8%	47.5%	13.9%	9.9%	4.0%	5.9%
Plan more public events to attract tourists to the area (n=381)	17.3%	52.5%	16.5%	8.1%	2.4%	3.1%
Provide assistance to local residents and businesses that sell goods and services to tourists (n=378)	16.4%	43.4%	21.4%	11.9%	3.7%	3.2%
Attract seasonal residents who purchase second homes in the area (n=380)	10.8%	38.7%	20.0%	16.6%	9.5%	4.5%
Offer adult education courses on hotel and restaurant management (n=375)	8.8%	42.6%	27.5%	10.9%	3.7%	6.4%
Attract outside investors to build a large resort and/or corporate conference center (n=380)	8.4%	19.2%	19.5%	28.4%	15.3%	9.2%
Recruit outside investors who have experience promoting tourism (n=377)	7.2%	34.5%	23.1%	22.3%	7.4%	5.6%

Of the seven strategies, respondents were most supportive of planning more public events to attract tourists to that area. Almost 70% either supported or strongly supported the idea and only 10.5% indicated some level of opposition, the lowest percentage of any strategy. The second most appealing strategy was developing a county-wide tourism management plan. Over two-thirds of respondents supported the idea while 13.9% opposed it.

The least favored strategy presented for tourism development was attracting outside investors to build a large resort and/or corporate conference center. Only 27.6% of respondents supported that strategy, compared to 43.7% in opposition. Some of this opposition may be directed toward the proposed facility and not the proposed investors. However, respondents were less averse to the more general notion of recruiting outside investors who have experience promoting tourism; 41.7% supported the idea and 29.7% opposed it.

When asked to identify the strategy that is most important for Piscataquis County, respondents' preferences shifted slightly. Figure 16 displays the percentage of respondents who chose each strategy as most important.

**Figure 16**  
**Most Important Tourism Development Strategy**  
 (n=306)



In general, the strategies that involve efforts for and by local residents were more popular than those involving the assistance or in-migration of people from outside the county. As shown in Table 23, developing a county-wide tourism management plan was the most popular strategy in Brownville, Dover-Foxcroft, and Greenville, and the third most popular in Milo. Providing assistance to local residents and businesses that sell goods and services to tourists was the most popular in Milo, and was chosen by at least 20% of respondents in the other three communities. Planning more public events to attract tourists received a similar level of support in Dover-Foxcroft, Greenville, and Milo, but roughly half as many Brownville residents (11.4%) chose that strategy.

None of the strategies involving outside investors or residents were highly favored as most important by respondents from any community. Only 4.2% of respondents felt that the county's most important strategy should be to recruit outside investors who have experience promoting tourism. Slightly more respondents (10.1%) favored attracting outside investors to build a large resort and/or corporate conference center in the area. Support for this strategy ranged from 8.6% in Brownville to 13.6% in Greenville. Respondents displayed similar low support for attracting seasonal residents who purchase second homes in the area. This strategy was most popular in Brownville, where 14.3% of respondents felt it is the most important strategy, and least popular in Greenville, where 6.8% identified it as most important.

**Table 23**  
**Most Important Development Strategy by Town**

	Brownville (n=35)	Dover-Foxcroft (n=133)	Greenville (n=59)	Milo (n=79)
Develop a county-wide tourism management plan	31.4%	25.6%	27.1%	16.5%
Plan more public events to attract tourists to the area	11.4%	22.6%	22.0%	25.3%
Provide assistance to local residents and businesses that sell goods and services to tourists	22.9%	21.1%	22.0%	31.6%
Attract seasonal residents who purchase second homes in the area	14.3%	11.3%	6.8%	12.7%
Offer adult education courses on hotel and restaurant management	5.7%	3.8%	6.8%	2.5%
Recruit outside investors who have experience promoting tourism	5.7%	6.0%	1.6%	2.5%
Attract outside investors to build a large resort and/or corporate conference center	8.6%	9.8%	13.6%	8.9%

Overall, respondents' preferences varied only slightly by their level of educational attainment. As shown in Table 24, respondents with at least 2-years of college experience were slightly more likely to select a county-wide tourism management plan (30.3% compared to 19.4%). They were slightly less likely to choose assisting local businesses, planning more public events, and attracting seasonal residents. However, these differences could also reflect variations in age and income. With the exception of the management plan, support for each strategy by educational attainment varied by less than six percentage points.

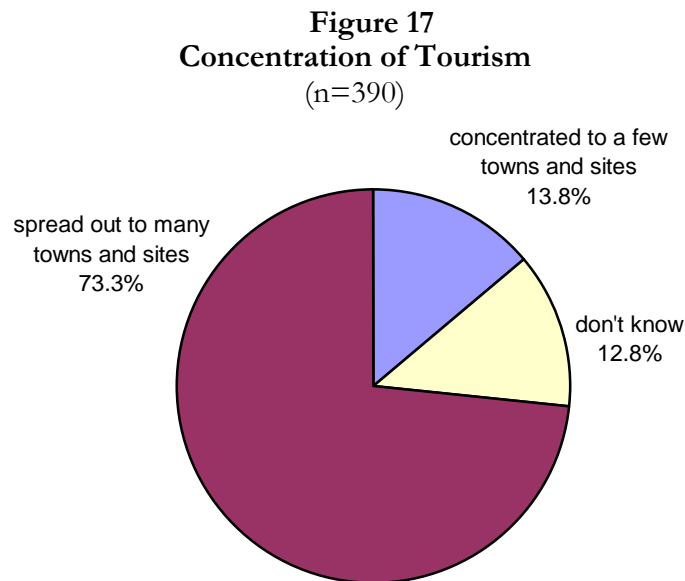
**Table 24**  
**Preferred Development Strategy by Educational Attainment**

	Less than 2 years of college (n=180)	At least 2-year college degree (n=122)
Develop a county-wide tourism management plan	19.4%	30.3%
Plan more public events to attract tourists to the area	23.3%	19.7%
Provide assistance to local residents and businesses that sell goods and services to tourists	26.1%	22.1%
Attract seasonal residents who purchase second homes in the area	13.3%	8.2%
Offer adult education courses on hotel and restaurant management	5.0%	2.5%
Recruit outside investors who have experience promoting tourism	3.3%	5.7%
Attract outside investors to build a large resort and/or corporate conference center	9.4%	11.5%

## **Location of Tourism**

Within Piscataquis County, some destinations currently attract more visitors than others. Some communities have long histories as tourist destinations for nature-based outdoor recreation and/or cultural-heritage. If the level of tourism within the region were to increase, business and community leaders could work to attract more tourists to established sites as well as less well-known sites.

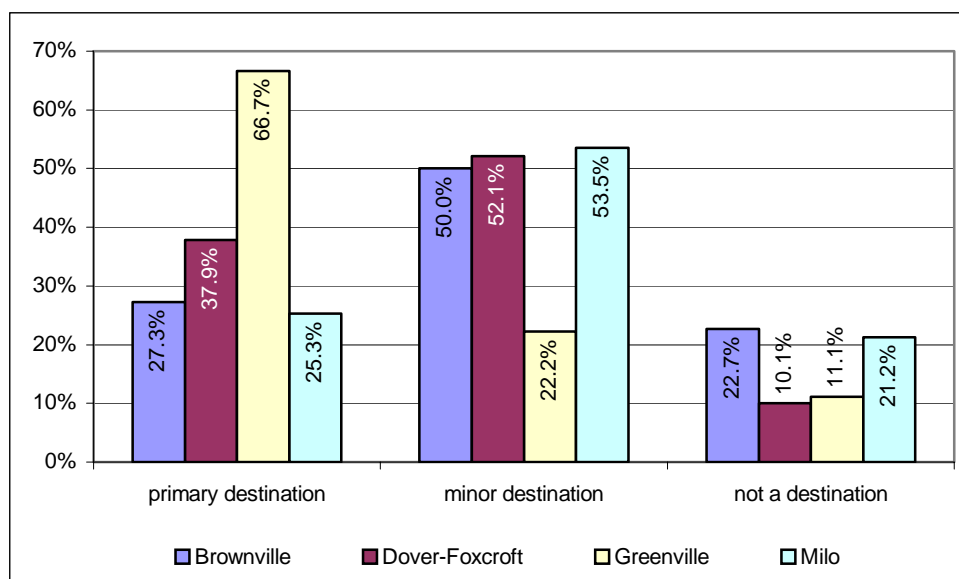
Residents of all four communities strongly felt that tourism in Piscataquis County should be spread out to many towns and sites. As shown in Figure 17, the vast majority of respondents (73.3%) preferred that tourism be spread to many communities. Relatively few (13.8%) would like tourism to be concentrated to a few sites. Responses to this question did not vary significantly across the four communities.



When considering how tourism should affect their home community, residents of the four communities felt quite differently. Figure 18 shows how respondents would like their town to fit into tourism in Piscataquis County. In only one community, Greenville, did a majority of respondents want to become a primary tourist destination. In Brownville, Dover-Foxcroft, and Milo, strong majorities favored becoming a minor tourist destination. In all four communities, at least 10% of residents preferred not to be a tourism destination at all. In Brownville and Milo, 22.7% and 21.2% of respondents opposed becoming a tourism destination respectively. Those figures are nearly double the percentage of Greenville and Dover-Foxcroft respondents who opposed becoming a tourism destination (10.1% and 11.1% respectively).



**Figure 18**  
**Vision for Tourism in Home Community**



As shown in Table 25, respondents' preferred vision for their home community varied according to whether or not they own a business in Piscataquis County. Respondents who were business owners were almost twice as likely to want their hometown to become a primary tourist destination and less than half as likely to prefer becoming a minor destination. Almost equal minorities of business owners and non-businesses owners would rather not become a tourist destination at all (15.5% and 14.6% respectively). It is important to note that the information provided by the business-owner respondents does not indicate whether their businesses are in their home communities.

**Table 25**  
**Vision for Tourism in Home Community**  
**by Business-Ownership Status\***

	business owners (n=58)	non-business owners (n=316)
Would like their town to become a...		
Primary tourist destination	60.3%	34.5%
Minor tourist destination	24.1%	50.9%
Not a tourist destination	15.5%	14.6%

\* "Business Owners" refers to the resident survey respondents who happened to own a business, not the business operators who were surveyed separately from residents. Survey results for business operators are in the next section of this report.

Table 26 displays the relationship between respondents' ages and their vision for tourism within their home communities. Respondents under age 65 were equally split between preferring their town to become a primary and a minor tourist destination (42.5% and 42.9% respectively). Of respondents age 65 or older, 30.0% wanted to become a primary destination and 55.6% preferred to become a minor tourist destination. These patterns help to explain some of the differences in responses among the four communities. Respondents from Brownville and Milo, 41.3% and 35.4%

of whom were 65 or older, were less interested in becoming a primary tourist destination than respondents from Dover-Foxcroft and Greenville, where 29.7% and 28.2% of respondents were 65 or older.

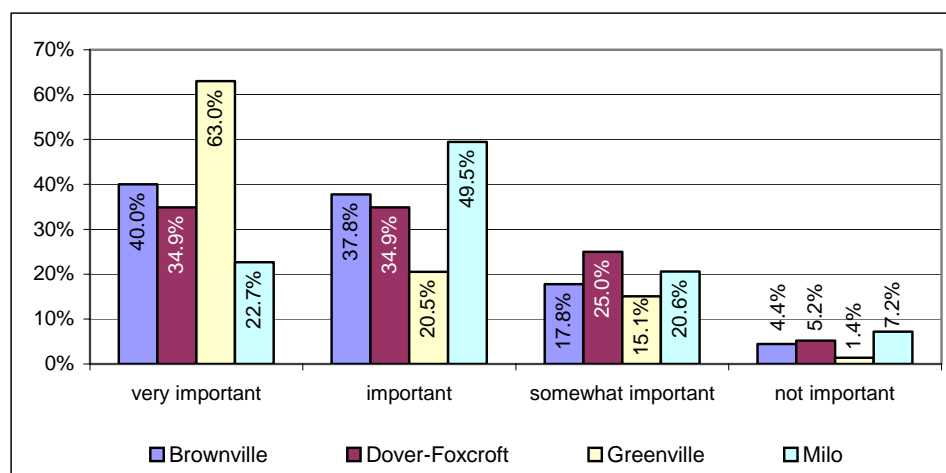
**Table 26**  
**Vision for Tourism in Home Community by Age**

	under age 65 (n=261)	age 65 or older (n=117)
Would like their town to become a...		
Primary tourist destination	42.5%	30.0%
Minor tourist destination	42.9%	55.6%
Not a tourist destination	14.6%	14.5%

### Importance of Tourism

Regardless of the role they would like their community to play in the tourism industry, most respondents felt that tourism should be important for the future of Piscataquis County. At least two-thirds of residents in all communities felt that tourism should play an important or very important role in the county's future. As displayed in Figure 19, Greenville residents were by far the most supportive of tourism becoming an important feature of the county's future. Perhaps reflecting their community's current and historical role as a tourism destination, nearly two-thirds (63.0%) of Greenville residents desired tourism to be very important to the county's future. This figure is nearly twice as high as Dover-Foxcroft residents (34.9%) and three times as many as Milo (22.7%). Similarly, many more Milo than Greenville residents felt that tourism should not be important for the future of Piscataquis County (7.2% and 1.4% respectively).

**Figure 19**  
**Tourism in Piscataquis County**



## BUSINESS SURVEY RESULTS

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### BUSINESS RESPONDENT CHARACTERISTICS

A separate survey of 455 business operators throughout Piscataquis County was conducted. Completed survey questionnaires were received from 208 business operators and were used for this analysis. The format of the business questionnaires varied only slightly from those distributed to residents. Demographic questions on the resident survey were replaced with questions about business characteristics. The majority of questions regarding nature-based and cultural-heritage tourism were the same as those in the resident survey.

#### Location

According to this sample of businesses, Dover-Foxcroft, Greenville, Guilford, and Milo are the primary business centers in Piscataquis County. As shown in Table 27, over 75% of the businesses represented by respondents are located within one of those communities.

**Table 27**  
**Business Respondents by Community**  
(n=208)

Abbot	5	(2.4%)	Milo	25	(12.0%)
Atkinson	2	(1.0%)	Monson	7	(3.4%)
Brownville	9	(4.3%)	Parkman	5	(2.4%)
Dover-Foxcroft	48	(23.1%)	Sangerville	11	(5.3%)
Greenville	53	(25.5%)	Sebec	7	(3.4%)
Guilford	31	(14.9%)	Shirley Mills	3	(1.4%)
Medford	1	(0.5%)	Williamsburg Twp	1	(0.5%)

#### Industry

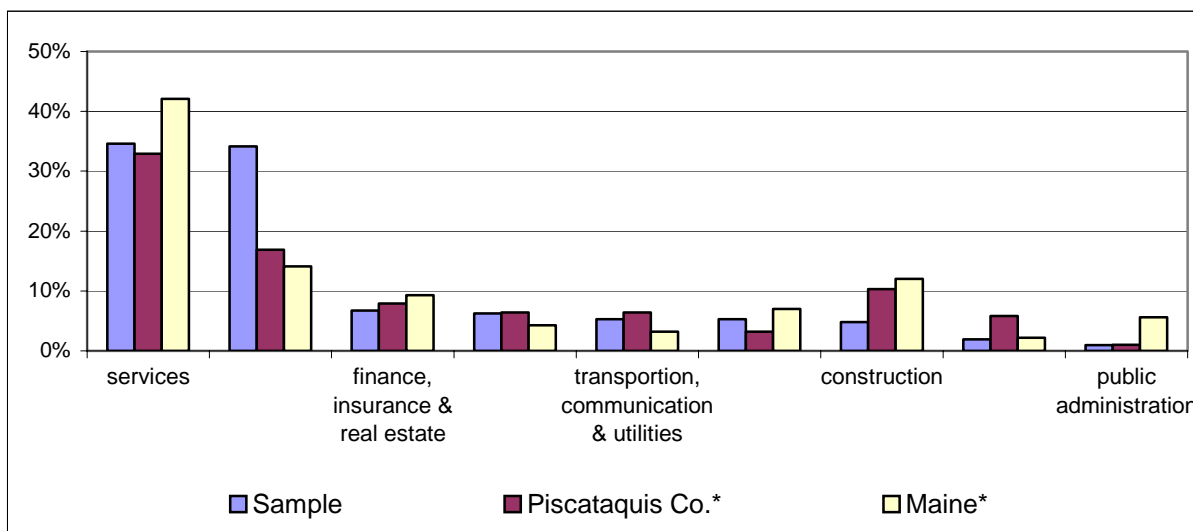
The list of establishments used to generate this sample included the Standard Industrial Classification (SIC) code of the primary industry in which each establishment operates. Table 28 displays the number of businesses in each industry. Almost two-thirds of businesses in this sample are involved in services or retail trade. Only about 2% (4 businesses) are in agriculture, forestry, and fisheries – industries that could be directly affected by tourism’s potential environmental effects. It should be noted that these four businesses fall into the agricultural component on the industry classification. Due to the small sample sizes for that industry and for public administration, industry-level statistics for those classifications are not reported in this analysis.

**Table 28**  
**Primary SIC Industry**  
(n=208)

Services	72	(34.6%)	Wholesale trade	11	(5.3%)
Retail trade	71	(34.1%)	Construction	10	(4.8%)
Finance, insurance, and real estate	14	(6.7%)	Agriculture, forestry, and fisheries	4	(1.9%)
Manufacturing	13	(6.3%)	Public administration	2	(1.0%)
Transportation, communication, and utilities	11	(5.3%)			

The mix of businesses used in this analysis differs from the actual mix of businesses in Piscataquis County. Compared to estimates from the Maine Department of Labor, our respondent sample contains more retail trade businesses and fewer businesses involved in construction, agriculture, forestry, and fisheries. Figure 20 displays the percentage of businesses by industry for the survey sample, Piscataquis County, and the state of Maine.

**Figure 20**  
**Percent of Businesses by Industry**

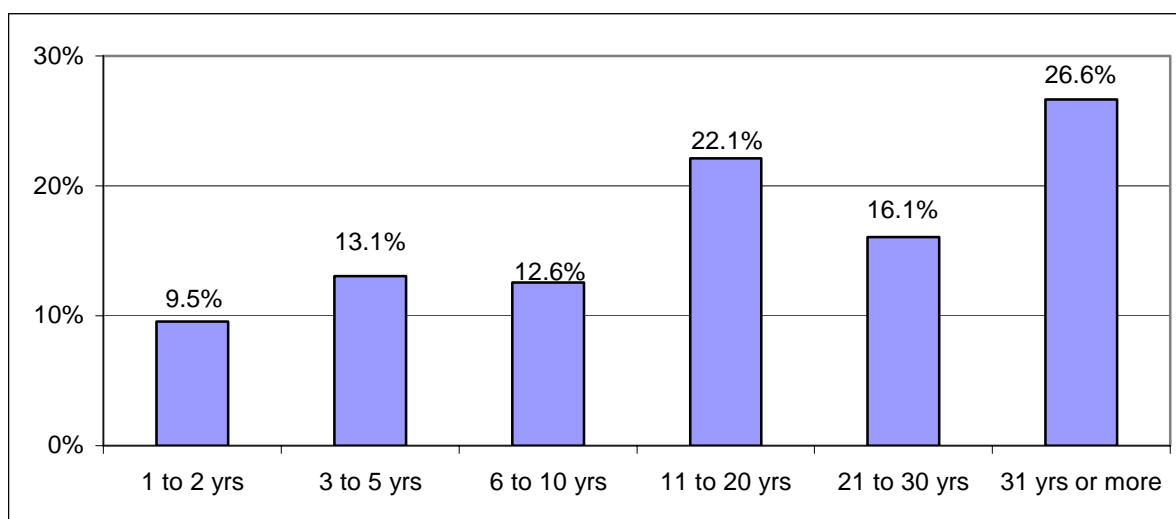


\*Source: Maine Department of Labor, Covered Employment and Wages By NAICS Sector, 2003

## Years of Operation

On average, responding businesses had operated in Piscataquis County for 26 years. Almost two-thirds (64.8%) had been there for over 10 years and over one-quarter (26.6%) had been there for over 30 years. Figure 21 displays the distribution of years in operation for all responding businesses. In our four focus communities, the average length of operation was 42.1 years in Brownville, 28.2 years in Dover-Foxcroft, 23.6 years in Greenville, and 19.5 years in Milo.

**Figure 21**  
**Years of Operation in Piscataquis County**  
(n=199)



## Business Structure

As shown in Table 29, a vast majority (85%) of businesses in our sample are proprietorships, partnerships, or privately-owned corporations. Another 7.7% are non-profit organizations and 1.4% are publicly-owned. Ownership structures listed under “other” included credit unions, mutual banks, and co-ops. Most businesses (82.7%) are single-establishment firms; only 16.3% are part of a multi-establishment operation.

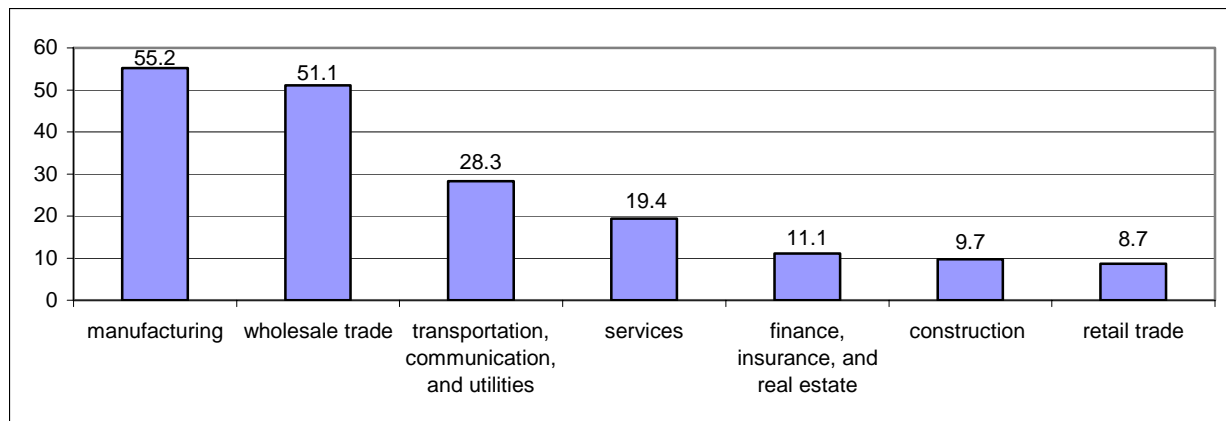
**Table 29**  
**Business Ownership Structure**  
(n=207)

Proprietorship or partnership	44.9%
Privately-owned corporation	40.1%
Non-profit organization	7.7%
Publicly-owned corporation	1.4%
Other	5.8%

## Employees

Most businesses responding are small businesses. In 2003, over half of them (52.7%) had 1 to 4 employees and the remainder (47.3%) had 5 or more. Figure 22 displays the average number of workers employed by businesses in each industry. Manufacturing and wholesale trade businesses had by far the highest numbers of employees. The average manufacturing operation employed 55.2 people and the average wholesale trade establishment employed 51.1. Retail trade and service businesses, which constitute over two-thirds of the businesses in the sample, employed on average 8.1 and 18.6 workers respectively.

**Figure 22**  
**Average Number of Employees in 2003 by Industry**  
(n=202)



For each industry, Figure 23 shows the total number of workers employed by the respondent businesses in that industry category. The service businesses represented in our sample employed 1,319 people in 2003, nearly twice as many as the businesses of any other industry. Despite the small average size of individual service establishments (as shown in Figure 21), they constitute over one-third of the businesses in the respondent sample and collectively employed more people than any other industry. The second largest industry is manufacturing, which employed 717 people. Manufacturing businesses tended to have the most employees, but since there are relatively few of them in the sample, the industry as a whole does not employ as many people as might be expected. Likewise, wholesale trade businesses tended to be nearly six times as large as retail trade establishments, but the two industries employed about the same number of people. They were the fourth and third largest employers in our respondent sample respectively.

**Figure 23**  
**Total Number of Employees in 2003 for each Industry**  
(n=202)



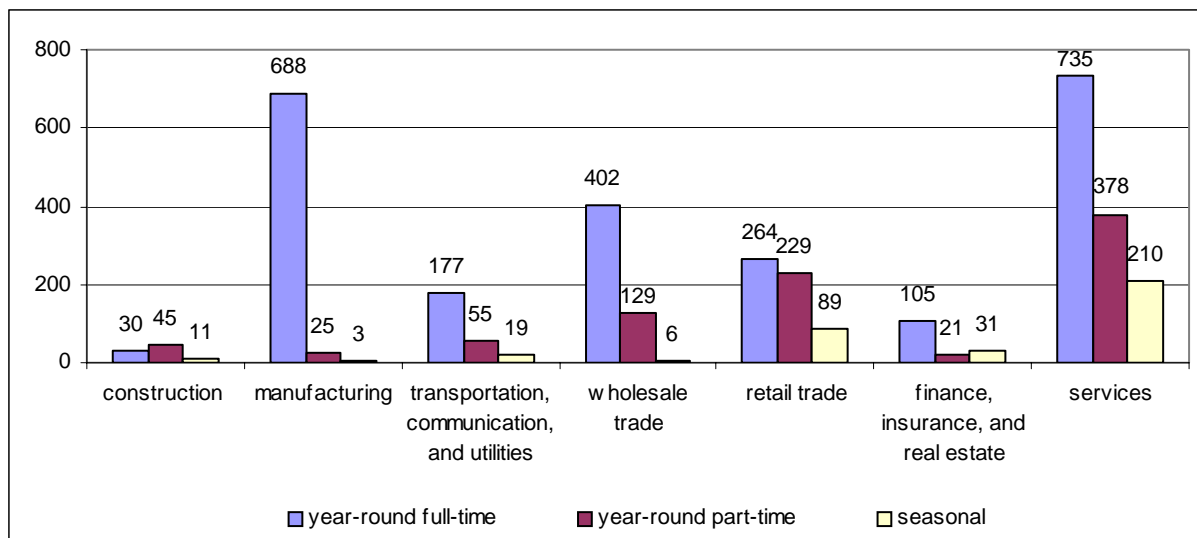
The survey asked business operators to indicate their 1998 employment levels. Of the 78 respondents who did so, 25.3% indicated an increase in employees between 1998 and 2003, 36.0% indicated a decrease, and 38.8% reported no change.

**Table 30**  
**Total Number of Employees, 1998 and 2003,**  
**for Businesses Operating in 1998**  
(n=178)

	1-2	3-5	6-10	11-20	21-50	50 or more
1998	26.2%	28.9%	22.8%	9.4%	5.4%	7.4%
2003	26.2%	26.8%	22.1%	10.1%	6.0%	8.7%

Business operators provided information on the types of employees they hired during 2003. Businesses in different industries displayed different hiring practices. Figure 24 shows the total number of year-round full-time, year-round part-time, and seasonal employees hired by each industry. Except for construction, all industries employed more year-round full-time employees than year-round part-time or seasonal employees. The degree to which full-time employees outnumber others varied considerably by industry. In manufacturing, 96.1% of all employees were year-round full-time, compared to 45.4% of employees in the retail trade industry.

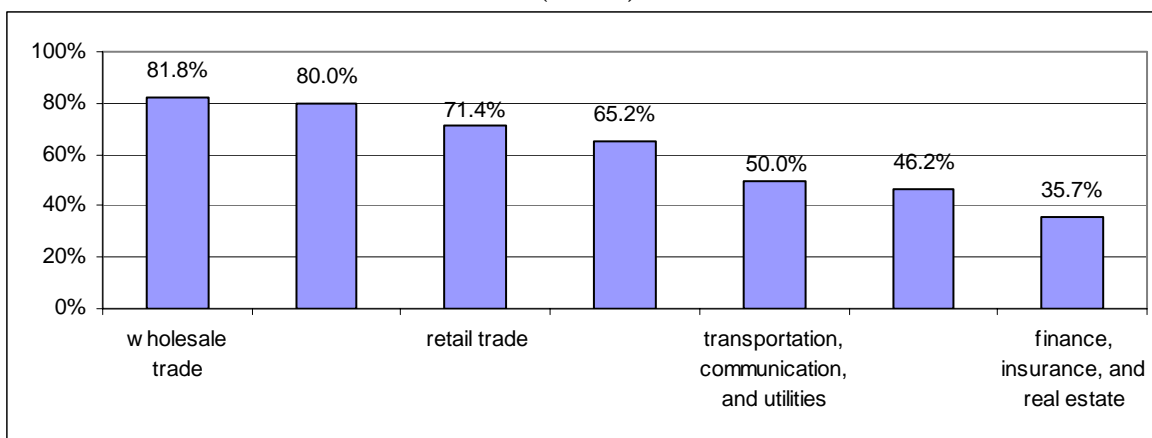
**Figure 24**  
**Total Number of Employees in 2003 for each Industry**  
**by Employee Type**



### Seasonality

Roughly two-thirds (64.5%) of responding businesses reported substantial seasonal fluctuations in business. As shown in Figure 25, some industries are more susceptible to fluctuations than others. 80% or more of businesses in the construction and wholesale trade industries experienced fluctuations compared to 35.7% in finance, insurance, and real estate, and 46.2% in manufacturing.

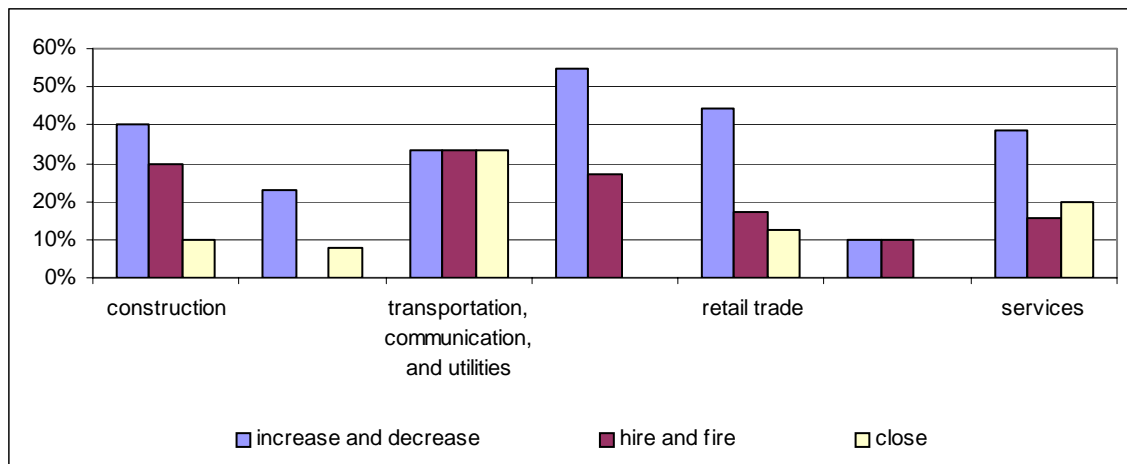
**Figure 25**  
**Percent of Businesses that Experience Seasonal Fluctuations**  
 (n=203)



Businesses that experience seasonal fluctuations employed a variety of strategies to cope with those changes. Over one-third (38.5%) of businesses increased or decreased employee hours, 16.7% hired and fired employees, and 14.6% closed during the off-season. 20.8% used another strategy, such as modifying hours of operation or inventory levels, preparing for the busy season, increasing advertising, or taking time off.

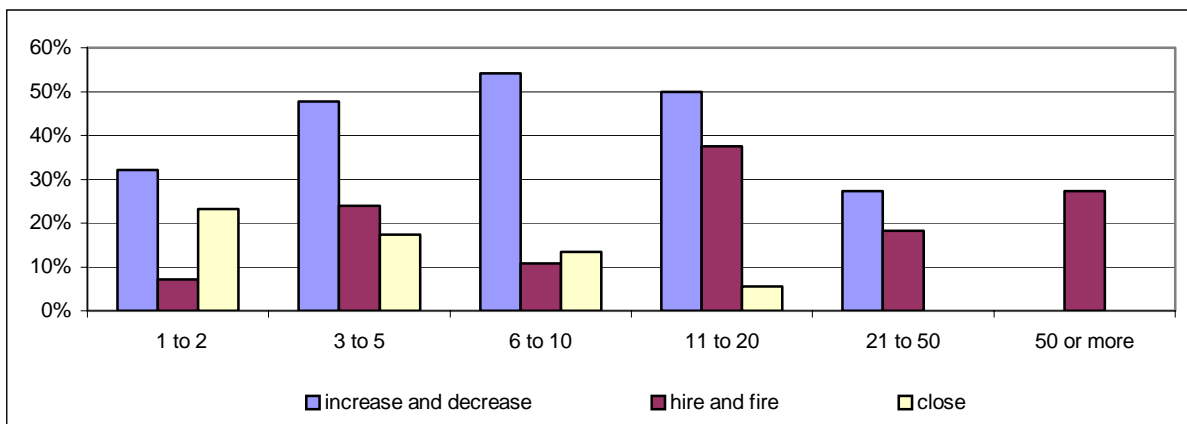


**Figure 26**  
**Responses to Seasonal Fluctuations by Industry**



Responses to seasonality varied by business size as well as by industry. As displayed in Figure 27, businesses with fewer employees were more inclined to increase and decrease employee hours or to close when faced with seasonal fluctuations in sales. No business with more than 20 employees reported closing, and no business with more than 50 employees reported increasing or decreasing employee hours. Instead, larger businesses were more likely than smaller businesses to hire and fire employees.

**Figure 27**  
**Responses to Seasonal Fluctuations by Number of Employees**



## BUSINESS DEVELOPMENT AND TOURISM

### Business Development Strategies

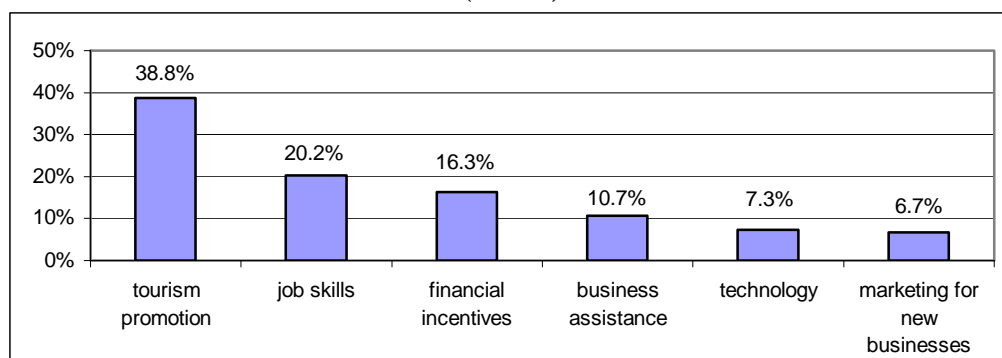
Respondents of all industries support a broad range of strategies for business development in Piscataquis County. Over 60% of respondents either supported or strongly supported all of the development strategies listed in Table 31. Respondents indicated strongest support for assisting local residents to develop and operate small businesses (74.5%), followed closely by expansion of tourism promotion (73.8%). Very few respondents opposed or strongly opposed any of the strategies. The most opposed strategy (7.6% opposition) is expansion of national marketing to attract new businesses.

**Table 31**  
**Support for Business-Development Strategies**

	strongly support	support	neutral	oppose	strongly oppose	don't know
Expand tourism promotion (n=199)	45.2%	28.6%	17.6%	2.0%	2.5%	4.0%
Offer financial incentives to attract and retain businesses (n=195)	43.6%	28.2%	15.9%	5.6%	1.5%	5.1%
Assist local residents to improve their job skills (n=197)	40.1%	32.5%	18.8%	3.0%	0.0%	5.6%
Strengthen technology and telecommunications countywide (n=192)	35.4%	37.0%	21.4%	1.0%	0.0%	5.2%
Expand national marketing to attract new businesses (n=198)	34.3%	31.3%	22.7%	6.1%	1.5%	4.0%
Assist local residents to develop and operate small businesses (n=198)	31.3%	43.4%	17.7%	2.0%	0.5%	5.1%

Respondents were asked which of the above strategies is the most important for their business. 38.8% chose expansion of tourism promotion, nearly twice as many as chose any other strategy. Assisting local residents to improve their job skills and offering financial incentives to attract and retain businesses followed with 20.2% and 16.2% respectively. The strategy selected least as most important was national marketing to attract new businesses (6.7%).

**Figure 28**  
**Most Important Business-Development Strategy**  
(n=178)

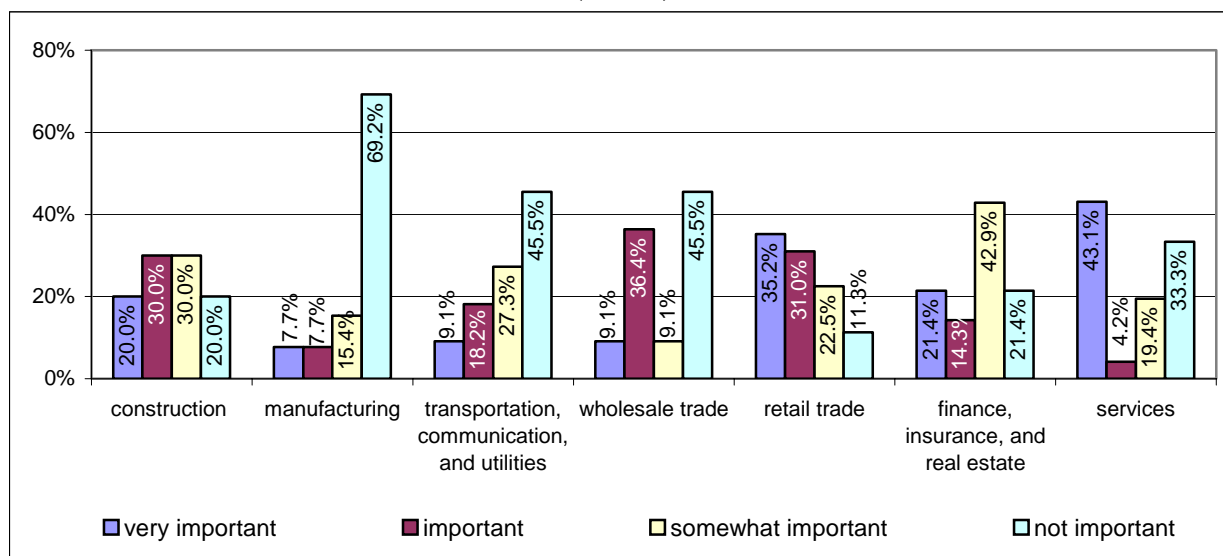


## Importance of Tourism

The support shown for tourism promotion suggests that tourism is important to the success of many local businesses. Indeed, business operators recognized tourism as being highly important to the overall business environment of Piscataquis County. 86.3% of respondents felt that tourism is either important or very important, while only 13.7% felt that it is somewhat important or not important.

Business operators were split on the importance of tourism to the success of their establishments. Nearly half (49.3%) felt that tourism is either important or very important. The other half (50.7%) felt that it is only somewhat important or not important. The distribution of these sentiments varied greatly by industry. Figure 29 shows the level of importance indicated by respondents from each industry.

**Figure 29**  
**Importance of Tourism to Business Success by Industry**  
(n=207)



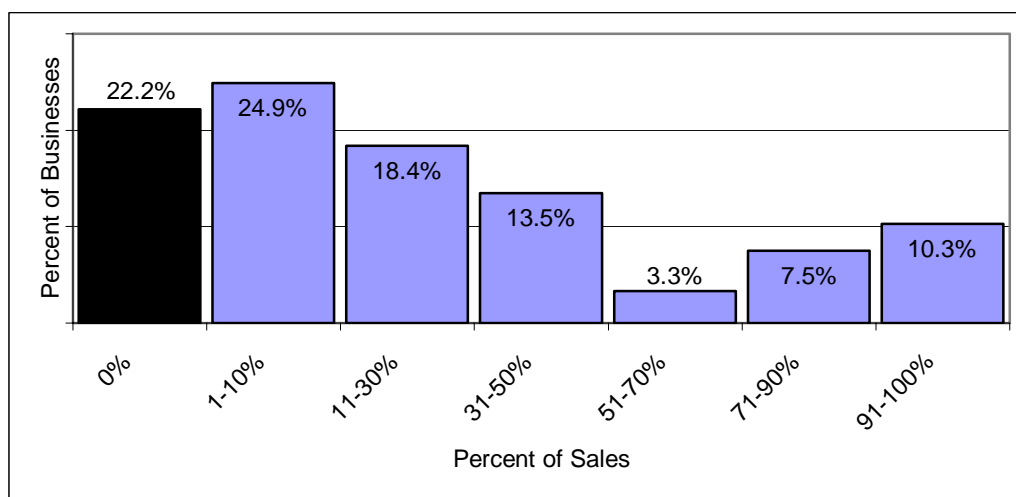
Not surprisingly, the importance of tourism to business success was positively associated with the percent of gross sales revenues related to tourism. On average, business operators who indicated that tourism is very important to their business success reported that 70.1% of their 2003 gross sales revenue related to tourism. On average, business owners who reported that tourism is not important to their business reported that 1.8% of their sales were related to tourism. Table 32 displays the average percentage of gross sales related to tourism by the reported importance of tourism business success.

**Table 32**  
**Average Percent of Gross Sales Revenues in 2003 Related to Tourism**  
**by Importance of Tourism to Business Success**  
(n=185)

	Importance of tourism to business success...			
	very important	important	somewhat important	not important
Average Percent of Gross Sales Revenues in 2003 Related to Tourism	70.1%	28.4%	9.9%	1.8%

The percentage of sales revenues related to tourism varied across businesses and industries. Figure 30 displays the percentage of revenues related to tourism for all responding businesses. More than one in five businesses (22.2%) reported that none of their revenues come from tourism. Manufacturing businesses were by far the most likely to be among that group; 69.2% of manufacturers reported no tourism-related revenue in 2003. On the other end, only 4.8% of retail trade businesses reported no tourism revenue. Roughly one-quarter (24.9%) of businesses attributed only 1-10% of sales to tourism, and 21.1% reported that over half of revenues are related to tourism. With just one exception, retail trade and service businesses were the only ones to report that more than 50% of their revenues stem from tourism. Retail and service establishments constitute the 10.3% of businesses that attributed 90-100% of their sales revenues to tourism.

**Figure 30**  
**Percent of Gross Sales Revenues in 2003 Related to Tourism**  
(n=185)



## NATURE-BASED TOURISM

### Nature-Based Tourism Development Strategies

As with the business development strategies, business operators generally supported a variety of potential mechanisms for attracting more visitors to Piscataquis County. Over 60% of respondents either supported or strongly supported all of the nature-based tourism development strategies listed in Table 33 except one – the implementation of user fees to support grooming of snowmobile trails. 19.5% opposed or strongly opposed that strategy making it the most opposed of all strategies presented. There is no apparent relationship between industry-type and support or opposition of that strategy.

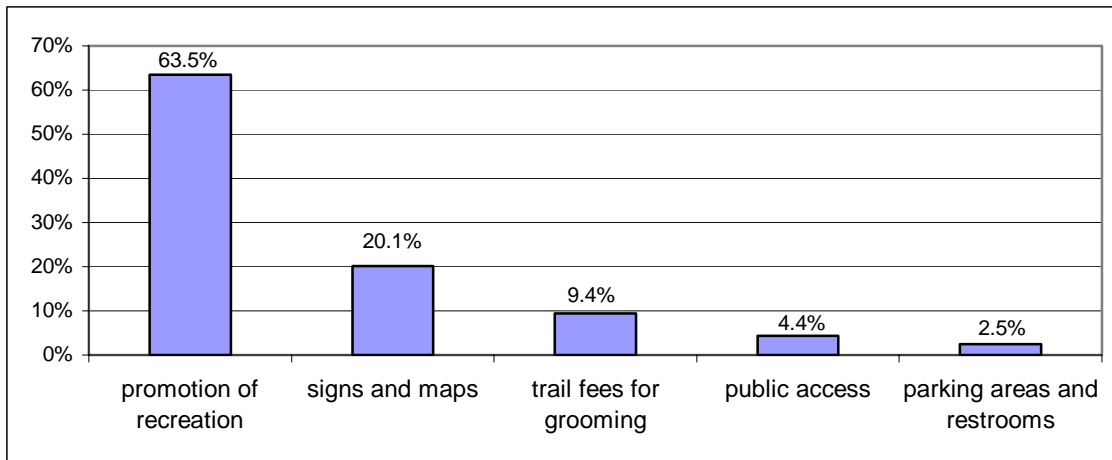
Over 80% of business operators supported or strongly supported increasing promotion of outdoor recreation opportunities and increasing signs and maps to direct tourists to recreation sites.

**Table 33**  
**Support for Nature-Based Tourism Development Strategies**

	strongly support	support	neutral	oppose	strongly oppose	don't know
Increase promotion of outdoor recreation opportunities (n=201)	51.2%	33.8%	10.0%	2.0%	1.5%	1.5%
Increase signs and maps to direct tourists to recreation sites (n=198)	37.4%	45.5%	13.1%	1.0%	1.5%	1.5%
Secure public access to boat launches on local waterways (n=200)	27.5%	43.5%	20.0%	2.0%	2.5%	4.5%
Build parking areas and provide restrooms at recreation sites (n=200)	21.5%	40.0%	28.0%	3.0%	3.0%	4.5%
Implement user fees to support grooming of snowmobile trails (n=195)	18.5%	32.3%	26.2%	14.4%	5.1%	3.6%

Business operators overwhelming chose the promotion of outdoor recreation opportunities as the most important strategy for Piscataquis County. That strategy was the most frequently selected by respondents from all but one industry (transportation, communication, and utilities). The second most popular (and first most for transportation, communication, and utilities) was increasing signs and maps to direct tourists to recreation sites. As shown in Figure 31, constructing parking areas and restrooms and securing public access to boat launches were chosen least often.

**Figure 31**  
**Most Important Nature-Based Tourism Development Strategy**  
(n=159)



### **Growth of Nature-Based Activities**

Business operators responded much like residents when asked how they would like the level of certain outdoor activities to change in coming years. Like residents, business respondents felt more favorably toward increases in non-motorized activities than motorized ones. However, for all activities except ATV riding, the proportion of business operators who desired increases surpasses the proportion of residents desiring increases by at least 20 percentage points (ATV riding is 8.9 percentage points higher).

The percentages of business operators desiring decreases in snowmobiling and motor boating were roughly half of the percentages of residents. Roughly equal portions of residents and businesses would like to see decreases in ATV riding (39.3% and 36.8% respectively). Another slight difference is that relatively more residents than business owners desired an increase of kayaking and canoeing than cross-country skiing.

**Table 34**  
**Preferred Growth of Nature-Based Activities**

	increase	stay the same	decrease	don't know
Camping and hiking (n=200)	82.0%	16.0%	0.0%	2.0%
Kayaking and canoeing (n=199)	77.9%	19.1%	0.0%	3.0%
Cross-country skiing (n=200)	77.0%	20.0%	0.0%	3.0%
Snowshoeing and dog sledding (n=200)	69.0%	26.5%	1.0%	3.5%
Snowmobiling (n=200)	49.0%	38.5%	9.5%	3.0%
Motor boating (n=200)	39.0%	48.0%	10.0%	3.0%
ATV riding (n=201)	26.9%	30.8%	36.8%	5.5%

## CULTURAL-HERITAGE TOURISM

### Cultural-Heritage Tourism Development Strategies

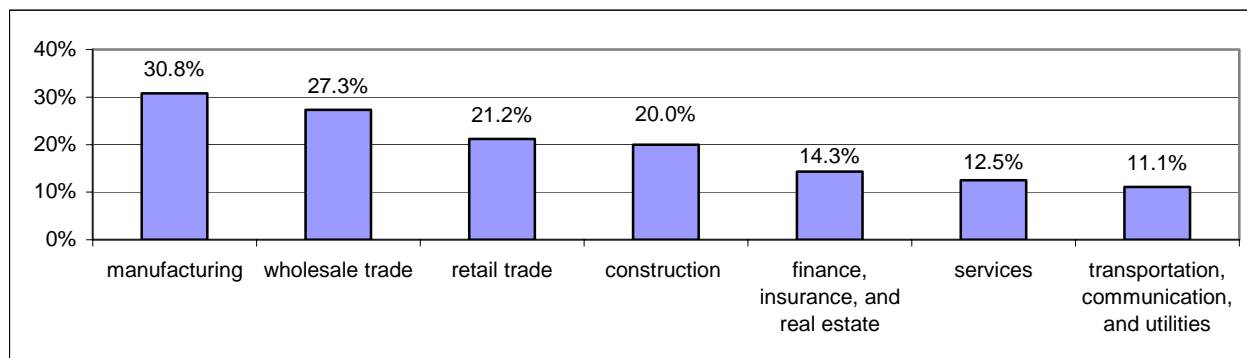
Business operators indicated their support for several cultural-heritage tourism development strategies, as shown in Table 35. Promoting the area's history and culture and increasing public awareness of the area's history, arts, and crafts received strong support. Over 75% of business respondents either supported or strongly supported those strategies.

**Table 35**  
**Support for Cultural-Heritage Tourism Development Strategies**

	strongly support	support	neutral	oppose	strongly oppose	don't know
Promote the area's history and culture to attract more tourists (n=202)	33.2%	44.1%	17.3%	2.5%	0.5%	2.5%
Increase public awareness of the area's history, arts, and crafts (n=201)	30.3%	45.8%	17.9%	1.5%	1.5%	3.0%
Open a regional cultural center such as a theater or museum (n=201)	25.4%	28.9%	30.8%	7.5%	4.0%	3.5%
Provide financial help to artists and crafters who want to start a business (n=200)	19.5%	27.5%	32.0%	11.0%	7.0%	3.0%

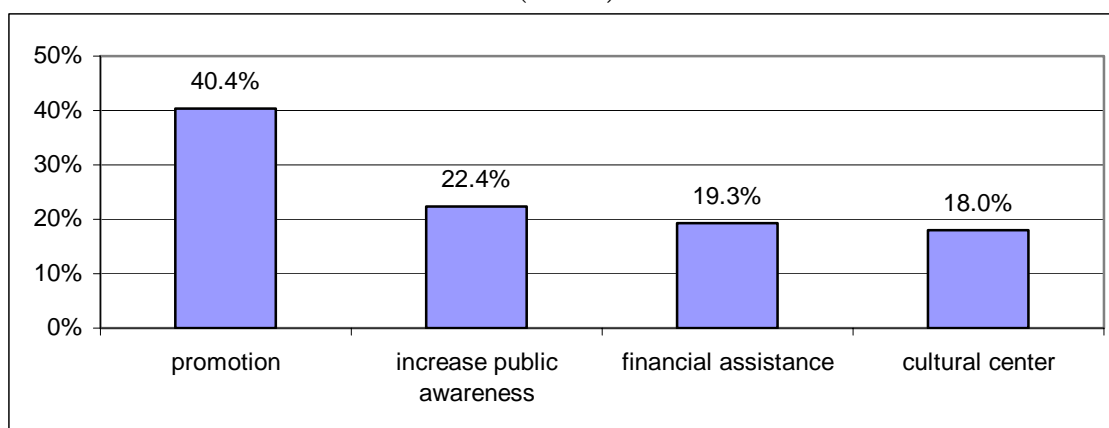
As with residents, the least favored strategy among business operators was providing financial help to artists and crafters who want to start a business. 47.0% of respondents supported the idea and 18.0% either opposed or strongly opposed it. As shown in Figure 32, opposition to the strategy varied across industries. 30.8% of manufacturing operators opposed the idea, as did 27.3% of those in wholesale trade. On the other hand, the idea was opposed by 11.1% of those in transportation, communications, and utilities and 12.5% in services. Support and opposition of this strategy did not vary significantly by business size.

**Figure 32**  
**Opposition to Financial Assistance to Artists and Crafters by Industry**



Business operators were divided on which of the above tourism development strategies is most important for Piscataquis County. As shown in Figure 33, just over 40% identified promotion of the area's history and culture and roughly half chose one of the other three strategies. However, since promoting history and culture and increasing public awareness of history, arts, and crafts are fairly similar, it seems safe to conclude that some kind of promotion or public awareness initiative would have broad support among the business community.

**Figure 33**  
**Most Important Cultural-Heritage Tourism Development Strategy**  
(n=201)



### **Growth of Cultural-Heritage Activities**

Business operators generally favored increases in a broad range of cultural-heritage activities. A majority of respondents would like increases in all of the activities listed in Table 36. Like resident respondents, businesses operators were most supportive of increases in live musical performances and local festivals (72.4% and 68.3% respectively). Also like residents, they gave less support to increases in arts and crafts fairs and open houses at art and craft studios. As with nature-based activities, the number of business operators who desired increases in each cultural-heritage activity was uniformly higher than it was for residents. The additional support of business operators ranged from 6.0 percentage points for musical performances to 15.8 percentage points for open houses.

**Table 36**  
**Preferred Growth of Cultural-Heritage Activities**

	increase	stay the same	decrease	don't know
Live musical performances (n=199)	72.4%	16.6%	2.0%	9.0%
Local festivals (n=199)	68.3%	23.6%	2.0%	6.0%
Live theatre performances (n=196)	62.8%	21.4%	1.5%	14.3%
Local sporting events (n=199)	59.8%	31.2%	1.5%	7.5%
Arts and crafts fairs (n=199)	54.8%	35.2%	4.0%	6.1%
Open houses at art and craft studios (n=198)	54.0%	32.3%	2.0%	11.6%



## EFFECTS OF TOURISM

### Economic Effects of Tourism

Tourism is already a significant component of Piscataquis County's economy and most business leaders have existing perceptions of its effects on local communities. Table 37 displays the degree to which business operators agreed or disagreed with several statements regarding the economic aspects of tourism. Over two-thirds (71.0%) of respondents believed that most businesses involved in tourism are small. Yet an even higher proportion (75.3%) disagreed that tourism only helps those businesses, and 57.6% disagreed that tourism does not provide the kinds of jobs the area needs. This implies that despite being small, tourism-related businesses are seen as positively contributing to the county's economy. These perceptions did not vary significantly by industry.

**Table 37**  
**Perceptions of Economic Aspects of Tourism**

	strongly agree	agree	neutral	disagree	strongly disagree	don't know
Most of the businesses involved in tourism are small (n=203)	22.7%	48.3%	4.9%	18.7%	2.5%	3.0%
Tourism contributes to local tax revenues (n=201)	12.9%	37.8%	10.9%	20.0%	10.0%	8.5%
Tourism does not provide the kinds of jobs our area needs (n=203)	9.9%	19.2%	11.8%	39.4%	18.2%	1.5%
Tourism provides mostly low-paying, seasonal jobs (n=202)	9.4%	39.1%	15.8%	24.3%	7.9%	3.5%
Tourism increases the local cost of living (n=202)	7.4%	25.2%	16.3%	33.7%	9.4%	7.9%
Tourism only helps businesses that sell directly to tourists (n=203)	2.5%	10.3%	10.3%	50.2%	25.1%	1.5%

In general, business owners had more favorable perceptions of the effects of tourism than residents. Almost half of business respondents (48.5%) either agreed or strongly agreed that tourism provides mostly low-paying, seasonal jobs. As shown in Table 38, this is considerably less than the 64.1% of residents who share that perception. Business owners were half as likely to agree that tourism only helps businesses that sell directly to tourists (12.8% versus 25.5%), one-third less likely than residents to believe that tourism does not provide the kinds of jobs the area needs (29.1% versus 45.9%), and slightly more likely to believe that tourism contributes to local tax revenues (50.7% versus 45.9%). However, slightly more business operators than residents believed that tourism increases the local cost of living (32.6% versus 29.8%).

**Table 38**  
**Perceptions of Economic Aspects of Tourism**  
**of Business Owners and Residents**

	Percent of respondents who “strongly agree” or “agree”	
	Business Owners	Residents
Most of the businesses involved in tourism are small	71.0%	72.9%
Tourism contributes to local tax revenues	50.7%	45.9%
Tourism does not provide the kinds of jobs our area needs	29.1%	45.9%
Tourism provides mostly low-paying, seasonal jobs	48.5%	64.1%
Tourism increases the local cost of living	32.6%	29.8%
Tourism only helps businesses that sell directly to tourists	12.8%	25.5%

### **Social and Environmental Effects of Tourism**

Tourism may have social and environmental impacts in addition to economic development effects. Business operators indicated the degree to which they agree or disagree with several statements regarding those impacts. As with economic effects, businesses operators had slightly more favorable perceptions than residents of the social and environment aspects of tourism. They were more likely to view the environmental impacts of tourism as minor (45.2% versus 39.0%), more likely to believe that tourist attractions/facilities improve a community’s appearance (69.4% versus 62.7%), and less likely to think that tourism reduces the quality of recreation opportunities (21.4% versus 31.2%). Again, these perceptions did not vary significantly by industry.

**Table 39**  
**Perceptions of Social and Environmental Aspects of Tourism**  
**of Business Owners and Residents**

	Percent of respondents who “strongly agree” or “agree”	
	Business Owners	Residents
Tourist attractions/facilities improve a community’s appearance	69.4%	62.7%
Tourism provides services/activities we wouldn’t otherwise have	64.6%	62.4%
Tourists and local residents get along with each other	56.3%	60.4%
Environmental impacts from tourism are relatively minor	45.2%	39.0%
Tourism makes the area more crowded and threatens privacy	32.1%	38.5%
Tourism reduces the quality of outdoor recreation opportunities due to overuse and crowding	21.4%	31.2%
Tourism facilities will restrict my access to area lakes, forests and open spaces	20.5%	23.6%
Tourism increases crime	17.7%	23.3%

## **Land Use**

Increasing the number of visitors and new residents in Piscataquis County could affect the way land and recreational assets are used. These changes could potentially affect some businesses. Some policies could protect the natural setting that draws many people to the area, thereby preserving the customer base of some businesses. Those policies could also limit the ability of some businesses to grow physically and perhaps limit their access to natural resources.

Business operators indicated their support for a number of policies that could be used to manage residential and commercial development in certain areas. As shown in Table 40, a majority of business operators supported managing growth near snowmobile trails, lakes and waterways, historic sites, and hiking trails. In general, the percentage of business operators who either supported or strongly supported each policy is a few percentage points lower than it is for residents. Business operators' responses did not vary greatly across industry.

**Table 40**  
**Support for Managed Development**

Manage residential and commercial development on land near to....	strongly support	support	neutral	oppose	strongly oppose	don't know
Lakes and waterways (n=197)	22.3%	41.6%	20.3%	6.1%	5.6%	4.1%
Historic sites (n=196)	19.9%	42.3%	23.0%	5.1%	5.6%	4.1%
Hiking trails (n=195)	18.5%	40.5%	26.2%	5.6%	5.6%	3.6%
Snowmobile trails (n=194)	17.0%	35.6%	27.3%	8.2%	7.2%	4.6%

Business operators showed slightly less support for the protection of land for public recreation. For these policies, their support levels closely mirror those of residents. Over half (51.8%) of business operators supported local zoning to some degree, although 22.6% either opposed or strongly opposed it. 41.4% supported the protection of land through outright purchases and 26.5% opposed it. That level of opposition was the highest for any of the proposed land-use policies. Business operators were less opposed to conservation easements; only 17.0% opposed them while 47.4% supported them.

**Table 41**  
**Support for Land Protection Policies**

Protect land for public recreation use through...	strongly support	support	neutral	oppose	strongly oppose	don't know
Conservation easements (n=194)	17.5%	29.9%	28.4%	11.3%	5.7%	7.2%
Local zoning (n=195)	17.4%	34.4%	21.5%	15.4%	7.2%	4.1%
Outright purchases (n=196)	12.8%	28.6%	27.0%	16.3%	10.2%	5.1%

Opposition to the proposed land protection strategies differed by industry. In general, business operators involved in manufacturing and services were least opposed to all three policies while those involved in retail and wholesale trade, and finance, insurance, and real estate were most opposed. Table 42 displays the percentage of respondents from each industry who either opposed or strongly opposed the proposed policies.

**Table 42**  
**Opposition to Land Protection Policies by Industry**

	Percentage of respondents who “strongly oppose” or “oppose”							
	entire sample (n=208)	construction (n=10)	manufacturing (n=13)	trans, comm., and utilities (n=11)	wholesale trade (n=11)	retail trade (n=71)	finance, ins, and real estate (n=14)	services (n=72)
Protect land for public recreation use through...								
Conservation easements	17.0%	30.0%	0.0%	12.5%	30.0%	25.4%	28.6%	5.9%
Local zoning	22.6%	20.0%	7.7%	12.5%	27.3%	33.3%	21.4%	16.2%
Outright purchases	26.5%	20.0%	15.4%	33.3%	36.4%	34.8%	50.0%	13.4%

Recreational trail systems draw many visitors to Piscataquis County and are an important asset for the area’s economy. Business operators indicated their support for three types of trail systems. Compared to residents, they showed relatively more favor for trails that provide for motorized use. More business operators than residents supported trail systems exclusively for motorized use (46.6% versus 39.2%). Business operators were also more supportive of trails for mixed use by non-motorized and motorized vehicles (52.6% compared to 44.3% of residents). Business respondents showed roughly equal support for trails exclusively for non-motorized use (55.3% compared to 56.6% of residents). It should be noted that more business owners opposed the options that include motorized use than opposed the non-motorized option. 25.9% and 19.6% opposed exclusively motorized and mixed-use trails respectively, compared to 18.4% who opposed non-motorized trails. Business operators’ responses did not vary greatly across industry.

**Table 43**  
**Support for Trail Systems**

Support trail systems that are....	strongly support	support	neutral	oppose	strongly oppose	don't know
Exclusively for non-motorized use (n=190)	23.7%	31.6%	23.7%	13.1%	5.3%	2.6%
Mixed non-motorized and motorized use (n=194)	17.5%	35.1%	25.3%	13.9%	5.7%	2.6%
Exclusively for motorized use (n=189)	16.4%	30.2%	23.8%	18.0%	7.9%	3.7%

In addition to natural resources and recreational assets, the cultural and historical character of an area can be an important draw for visitors. Business operators indicated their support of a number of policies aimed at protecting cultural-heritage resources in Piscataquis County. As shown in Table 44, a majority of respondents either supported or strongly supported historic zoning, restoration of historic buildings, and standards for new buildings.

**Table 44**  
**Support for Cultural-Heritage Resource Protection**

Protect cultural-heritage resources through....	strongly support	support	neutral	oppose	strongly oppose	don't know
Restoration of historic buildings (n=198)	23.2%	47.5%	19.7%	2.5%	4.0%	3.0%
Standards for new buildings (n=194)	17.5%	36.6%	29.9%	5.2%	5.7%	5.2%
Historic zoning (n=194)	13.4%	39.2%	26.3%	7.2%	8.2%	5.7%

As with policies to protect land, business operators' opposition to the proposed cultural-heritage resource protection policies varied by industry. Table 45 displays the percentage of respondents who either opposed or strongly opposed each policy. In general, those involved with services have little opposition to any of the three policies. Respondents from the transportation, communication, and utilities industry had no opposition to historic zoning or restoration of historic buildings but had slight opposition to standards for new buildings. On the other hand, wholesale traders opposed only historic zoning, but that opposition is significant (27.3%). In general, manufacturers and retailers showed the most opposition to the proposed resource protection policies.

**Table 45**  
**Opposition to Cultural-Heritage Resource Protection Policies**  
**by Industry**

Protect cultural-heritage resources through....	Percentage of respondents who "strongly oppose" or "oppose"							
	entire sample (n=208)	construction (n=10)	manufacturing (n=13)	trans, comm., and utilities (n=11)	wholesale trade (n=11)	retail trade (n=71)	finance, ins, and real estate (n=14)	services (n=72)
Restoration of historic buildings	6.5%	10.0%	7.7%	0.0%	0.0%	9.1%	14.3%	4.3%
Standards for new buildings	10.9%	10.0%	30.8%	11.1%	0.0%	15.2%	0.0%	6.1%
Historic zoning	15.4%	10.0%	15.4%	0.0%	27.3%	24.6%	21.4%	0.0%

## FUTURE OF TOURISM IN PISCATAQUIS COUNTY

### Tourism-Based Economic Development Strategies

Business operators were asked to speculate on the potential effects of increased tourism on Piscataquis County. Table 46 displays the degree to which they agreed or disagreed with several projections. Their answers closely mirror those given by residents and do not vary greatly by industry. Notably, 91.9% of business operators believed that increased tourism would increase sales to local businesses.

**Table 46**  
**Projected Effects of Tourism in Piscataquis County**

Increased tourism in Piscataquis County will:	strongly agree	agree	neutral	disagree	strongly disagree	don't know
Increase sales to local businesses (n=199)	28.1%	63.8%	6.0%	1.0%	0.0%	1.0%
Improve the overall quality of life of residents (n=197)	14.7%	38.1%	27.4%	12.2%	3.6%	4.1%
Increase in-migration by new residents (n=197)	13.2%	60.9%	12.7%	5.6%	0.5%	7.1%
Preserve local culture and heritage (n=198)	12.6%	45.5%	27.8%	9.6%	2.0%	2.5%
Improve job opportunities (n=199)	11.6%	59.3%	17.1%	8.0%	2.0%	2.0%
Result in over development of land (n=197)	11.2%	23.4%	26.4%	28.9%	4.6%	5.6%
Preserve land and natural resources (n=197)	8.1%	34.5%	29.4%	20.3%	3.0%	4.6%
Improve local municipal services (n=197)	7.6%	33.0%	29.9%	18.8%	2.0%	8.6%

Compared to residents, more business operators either agreed or strongly agreed that tourism would improve job opportunities in Piscataquis County (70.9% versus 56.3%), and more believe that tourism would increase in-migration of new residents (73.9% versus 61.2%).

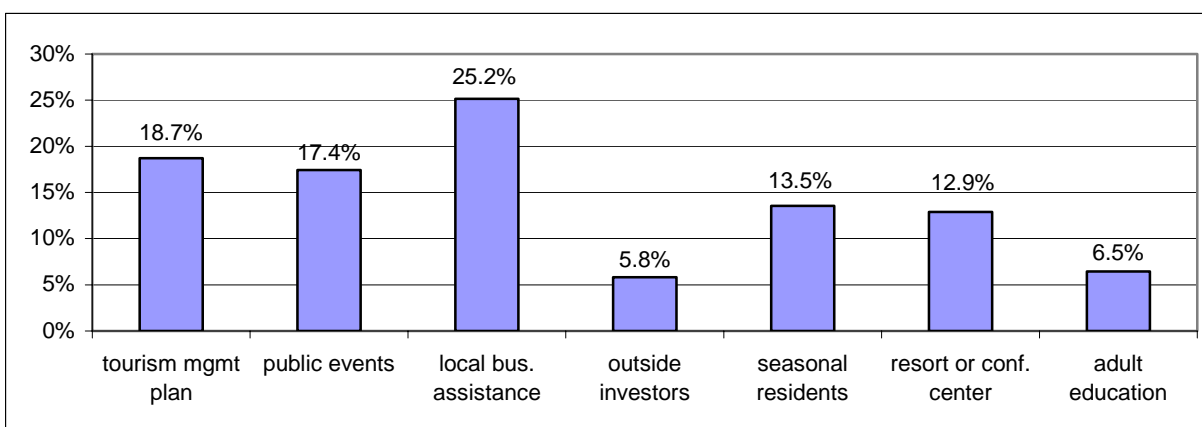
Several strategies could help to increase the number of visitors to Piscataquis County. Business operators were asked to indicate their support for or opposition to a number of potential strategies. Table 47 displays their responses. Planning more events to draw tourists to the area received the most favor; 77.0% of respondents either supported or strongly supported the strategy. Nearly as many (74.6%) supported the development of a county-wide tourism development plan. As with residents, the two strategies that involved outside investors received the lowest support among business operators. Over one-quarter (25.6%) opposed the recruitment of outside investors who have experience promoting tourism. Even more (36.7%) opposed attracting outside investors to build a large resort and/or corporate conference center.

**Table 47**  
**Support for Tourism-Based Economic Development Strategies**

	strongly support	support	neutral	oppose	strongly oppose	don't know
Develop a county-wide tourism management plan (n=197)	27.9%	46.7%	14.2%	6.6%	2.5%	2.0%
Plan more public events to attract tourists to the area (n=200)	25.5%	51.5%	16.0%	5.0%	1.0%	1.0%
Provide assistance to local residents and businesses that sell goods and services to tourists (n=198)	22.2%	38.4%	22.7%	13.1%	2.0%	1.5%
Recruit outside investors who have experience promoting tourism (n=199)	14.1%	28.6%	26.6%	21.6%	4.0%	5.0%
Attract seasonal residents who purchase second homes in the area (n=199)	13.6%	35.7%	29.1%	12.1%	7.0%	2.5%
Attract outside investors to build a large resort and/or corporate conference center (n=199)	12.6%	24.1%	23.6%	23.1%	13.6%	3.0%
Offer adult education courses on hotel and restaurant management (n=198)	11.1%	46.0%	27.3%	11.6%	1.5%	2.5%

Figure 34 displays the percentage of business respondents who chose each of the above strategies as the most important tourism-development strategy for Piscataquis County. Roughly one-quarter of respondents (25.2%) identified the provision of assistance to local residents and businesses that sell to tourists as most important. 18.7% chose a county-wide tourism management plan and 17.4% selected more public events. Very few business operators (5.8% and 6.5% respectively) chose recruiting outside investors and adult education as the most important strategy.

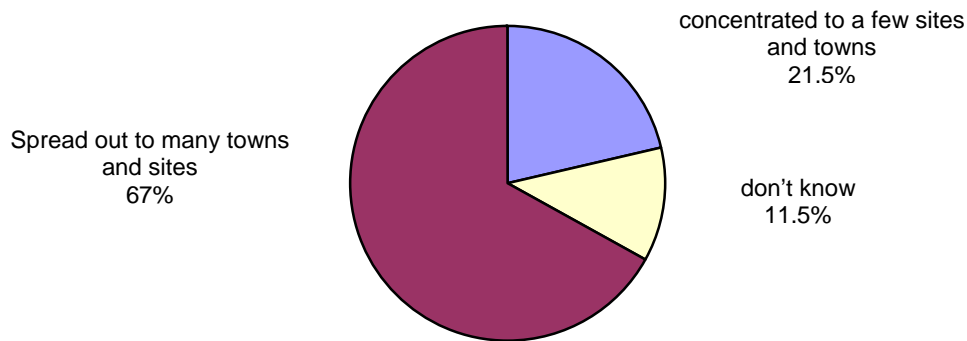
**Figure 34**  
**Most Important Tourism Development Strategy**  
(n=155)



## Location of Tourism

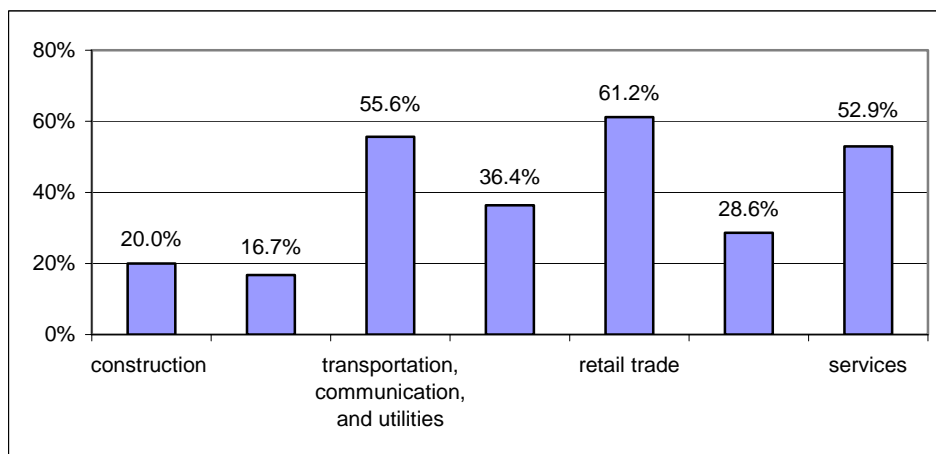
Over two-thirds of business operators (67.0%) would like to see tourism spread out to many towns and sites throughout Piscataquis County, and over one-fifth (21.5%) preferred it to be concentrated to a few sites and towns. This distribution closely matches residents' responses, although relatively more residents would like tourism to be spread out (73.3%) and fewer wanted it to be concentrated (13.8%).

**Figure 35**  
**Concentration of Tourism**  
(n=200)



Business owners had differing preferences for the future of tourism in the community in which their business is located. In total, roughly half (48.7%) would like their community to become a primary destination, while the other half would prefer it to be a minor destination (39.6%) or not a destination (11.7%). For each industry, Figure 36 displays the percentage of business owners who preferred their business's community to become a primary tourist destination.

**Figure 36**  
**Percentage Desiring to be Primary Destination by Industry**  
(n=197)





As shown previously in Figure 28, services and retail trade are the industries in which most business operators indicated that tourism is very important to the success of their establishments. Thus, it is not surprising that a majority of respondents from those industries would like their business's community to become a primary tourism destination. Most respondents from the transportation, communication, and utilities industry did not indicate that tourism is important; their desire for increased visitation may indicate their relationship to other businesses that cater to tourists.

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## SUMMARY FINDINGS

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### **Resident Survey**

#### **Respondent Characteristics**

The survey respondent group contains a disproportionate number of older residents; the average age of 55.9 years is substantially higher than the average age of Piscataquis County's population as a whole. Additionally, survey respondents generally had more years of formal education. Many respondents had lived in Piscataquis County for the majority of their lives; over 70% had lived there for over 20 years and only 15.9% had lived there for fewer than 10 years. An even higher proportion of respondents had lived in Maine for over 20 years.

#### **Nature-Based Tourism Development**

Residents generally support a variety of nature-based tourism development strategies. When asked to prioritize those strategies, they overwhelmingly chose increased promotion of outdoor recreation opportunities over more targeted strategies such as signs and maps to direct tourists to recreation sites, securing public access to boat launches on local waterways, building parking areas and restrooms at recreational sites, and increasing grooming of snowmobile trails through user fees. When asked which recreation activities they would like to see increase in coming years, residents were much more supportive of non-motorized activities rather than motorized ones.

#### **Cultural-Heritage Tourism Development**

In general, respondents either supported or felt neutrally toward a variety of strategies to attract more visitors to Piscataquis County. Increasing public awareness of the area's history, arts, and traditional crafts received the most support, followed closely by promoting the area's history and culture. About three-fourths of respondents supported each of those strategies. Residents were slightly less supportive of building a regional cultural center and providing financial help to artists and crafters who want to start a business.

#### **Effects of Tourism**

In answers to several questions, residents conveyed mixed perceptions of the economic effects of tourism on their communities. Over 90% agreed that increased tourism would increase sales to local businesses. However, one in four respondents believe that tourism only helps businesses that sell directly to tourists. Almost half strongly believe that tourism does not provide the kinds of jobs the area needs. However, a majority of respondents feel that increased tourism would improve job opportunities in Piscataquis County. Respondents may feel that more tourism-related jobs would improve current opportunities but still not provide the type of employment that the county needs.

Residents were evenly split on potential environmental impacts of tourism in Piscataquis County. For instance, roughly equal proportions of respondents believed that increased tourism would preserve land and natural resources as believed that increased tourism would result in over development of land. However, by a ratio of two to one, residents disagreed that tourism would restrict their ability to access area lakes, forests, and open spaces. Similarly, by a ratio of nearly ten to one, residents agreed that increased tourism would increase the in-migration of new residents.

Residents who own businesses in Piscataquis County answered some questions differently than those who do not own businesses. Resident business owners were considerably more likely to perceive tourism-related businesses as small and failing to provide the kinds of jobs the area needs.

On the other hand, business owners were less likely to view tourism jobs as low-paying and seasonal. Business owners were almost twice as likely to believe that tourism lowers local tax bills by contributing to local tax revenues.

### **Land-Use Policies**

In general, a majority of residents support a variety of policies to manage development near snowmobile trails, lakes, waterways, historic sites, and hiking trails. When asked about protecting land for public recreation, only local zoning received support from a majority of residents. Conservation easements and outright purchases were supported by 46.4% and 41.1% respectively. Survey respondents displayed strong support for the preservation of historic sites and buildings, and standards for new buildings.

A majority of residents supported or strongly supported recreational trail systems that are exclusively for non-motorized use, while slightly less than half supported trails for mixed motorized and non-motorized use and about 40% supported trails exclusively for motorized use. Support for the three types of trail systems differed according to the recreational activities of the respondent. Individuals who indicated that they enjoy snowmobiling and/or ATV riding generally supported all three types of trail systems; those who did not were less likely to support trail systems exclusively for motorized use and mixed-use trails for mixed.

### **Future of Tourism**

Resident survey respondents indicated mixed support for the tourism-based economic development strategies presented in the questionnaire. They were most supportive of broad strategies such as planning more public events to attract tourists to that area, developing a county-wide tourism management plan, and assisting local residents and businesses that sell goods and services to tourists. Two of the least supported strategies were attracting outside investors to build a large resort and/or corporate conference center and recruiting outside investors who have experience promoting tourism.

At least two-thirds of residents felt that tourism should play an important role in the future of Piscataquis County. Residents strongly felt that tourism in should be spread out to many towns and sites rather than concentrated to just a few areas. Except in Greenville, respondents generally preferred their town to become a minor tourism destination rather than a primary destination. Older residents were even more likely to desire their community to become a minor rather than primary destination. In all communities, 10-20% of residents preferred not to be a tourism destination.

### **Community Differences**

Respondents from the four focus communities, Brownville, Greenville, Dover-Foxcroft, and Milo, held differing views on the nature of tourism and its potential impact on Piscataquis County. Some of these differences may stem from demographic differences across communities, such as age, income, and education level, while others may be tied to the circumstances of individual communities.

***Brownville*** residents constitute 11.5% of the survey sample. As a whole, Brownville respondents were older than respondents from the other communities, more likely to be retired, and had slightly fewer years of formal education. In their survey responses, Brownville respondents were twice as likely as respondents from Greenville and Dover-Foxcroft to oppose their town becoming a tourism destination. When asked about the most important tourism development strategy for Piscataquis

County, Brownville residents were roughly half as likely as other respondents to choose planning more public events to attract tourists as respondents from other communities. They were relatively more likely to choose development of a county-wide tourism management plan. Brownville residents were relatively more receptive to increases in motorized recreation, specifically snowmobiling and ATV riding, than respondents from other communities. Brownville residents were also more supportive of motorized use trails and they were slightly more supportive of managing growth near snowmobile and hiking trails. Respondents from Brownville were uniquely supportive of future increases of arts and crafts fairs, and uniquely less supportive of increased theatre performances.

**Dover-Foxcroft** residents constitute 43.9% of the survey sample. On average, Dover-Foxcroft respondents have 14.0 years of formal education, the highest of the four communities. Dover-Foxcroft also had the most full-time workers, 42.8% of respondents. Over 30% of Dover-Foxcroft respondents desired tourism to be only somewhat important or not important to the county's future, the most of any community.

**Greenville** residents constitute 18.8% of the survey sample. As a group, Greenville respondents were the youngest of all the communities (although their average age is 53.6 years). Nearly two-thirds of Greenville residents desired tourism to be very important to the future of Piscataquis County, almost twice as many as in Dover-Foxcroft and three times as many as in Milo. Greenville was the only community in which a majority of respondents preferred their town to become a primary destination. Compared to other communities, Greenville residents were noticeably more supportive of conservation easements and outright purchases as strategies to protect land for public recreation use. They were less supportive of local zoning. Greenville residents were about half as likely as other respondents to choose attracting seasonal residents who purchase second homes in the area as the most important tourism development strategy for Piscataquis County. They were also less likely to choose recruiting outside investors who have experience promoting tourism. On the other hand, they were considerably more likely to choose attracting outside investors to build a large resort and/or corporate conference center.

**Milo** residents constitute 25.8% of the survey sample. Along with Brownville, Milo respondents were twice as likely as Greenville and Dover-Foxcroft respondents to oppose their town becoming a tourism destination. Milo residents were almost half as likely as other respondents to select development of a county-wide tourism management plan as the most important tourism development strategy for Piscataquis County. They were nearly 50% more likely to choose providing assistance to local residents and businesses that sell goods and services to tourists. Compared to other communities, Milo residents were noticeably less supportive of managing development near snowmobile trails, lakes and waterways, historic sites, and hiking trails, although a majority of Milo residents supported those policies. Milo respondents were significantly less likely than others to support local zoning, conservation easements, and outright purchases as strategies to protect land for public recreation use.

## **Business Survey**

### **Business Characteristics**

Most businesses represented in the survey respondent sample are located in Dover-Foxcroft, Greenville, Guilford, and Milo. These communities constitute the primary business and population centers of Piscataquis County. The vast majority of responding businesses are involved in the service and retail trade industries and have been in business for more than 5 years. Piscataquis County businesses are relatively small; over 75% of surveyed establishments have 1 to 10 employees. Roughly two-thirds of businesses reported seasonal fluctuations in sales. Construction and wholesale trade businesses were more likely to experience seasonal fluctuations while manufacturers and those involved in finance, insurance, and real estate were less likely to experience fluctuations.

### **Business Development and Tourism**

Business operators supported a broad range of business development strategies. When asked to prioritize those strategies, nearly two-fifths of respondents chose expansion of tourism promotion as most important for Piscataquis County, twice as many as chose one of the other strategies presented. Overall, business operators indicated that tourism is important to the business environment of Piscataquis County. This sentiment was shared by businesses that attributed a large percentage of their sales revenue to tourism and those that attributed only a small percentage or none of their sales to tourism.

### **Nature-Based Tourism Development**

Business operators generally supported a variety of potential mechanisms for attracting more visitors to Piscataquis County. They indicated strongest support for development strategies based around the promotion and marketing of outdoor recreation opportunities, rather than more targeted strategies such as securing public access to boat launches on local waterways and building parking areas and rest rooms at recreation sites. Promotion and marketing strategies may be perceived as offering broad benefits to all Piscataquis businesses, rather than targeted benefits to select groups of businesses. Compared to residents, business operators showed higher support for increases of every motorized and non-motorized outdoor recreation activity listed in the questionnaire and relatively less support for decreases in motorized activities.

### **Cultural-Heritage Tourism Development**

As with nature-based tourism development strategies, business operators were more favorable toward general promotion of cultural-heritage tourism rather than targeted strategies such as opening a regional cultural center or providing financial assistance to artists and crafters who want to start a business. Over half of business respondents indicated a desire for all forms of cultural activities to increase in coming years and no more than 4.0% wanted any of those activities to decrease.

### **Effects of Tourism**

Business operators generally had a positive perception of the effects of tourism on the business environment of Piscataquis County; less than 13% agreed that tourism helps only businesses that sell directly to tourists. Over 70% agreed that increased tourism would improve local job opportunities. By a ratio of more than three to one, business respondents agreed that increased tourism would improve the overall quality of life of Piscataquis County residents, stronger agreement than expressed by residents. A majority of business operators agreed that tourism improves a community's appearance and provides services/activities that it would not otherwise have. Only about one-fifth of business respondents thought that tourism reduces the quality of outdoor

recreation opportunities due to overuse and crowding or restricts access to area lakes, streams, and open spaces. Similarly, business respondents agreed that increased tourism would preserve land and natural resources by a ratio of nearly two to one.

### **Land-Use Policies**

A majority of business operators supported managing residential and commercial development near snowmobile trails, lakes, waterways, historic sites, and hiking trails. However, their support for all management policies is generally a few percentage points lower than is support by residents. Business operators showed slightly less support for the protection of land for public recreation through zoning, conservation easements, or outright purchases. Opposition for these protection policies ranged from 17.0% to 26.5%, nearly double the level of opposition for the management strategies. About half of business operators supported exclusive motorized use trails, non-motorized use trails, and mixed non-motorized and motorized use. Opposition for those trail systems varied from 18.4% opposed to exclusively non-motorized trails to 25.9% opposed to exclusively motorized trails.

### **Future of Tourism**

Planning more events to draw tourists to Piscataquis County and developing a county-wide tourism development plan received the most favor among business operators as tourism development strategies. As with residents, the two strategies that involved outside investors received the lowest support among business operators. Over two-thirds of business operators would like to see tourism spread out to many towns and sites throughout Piscataquis County. Over one-fifth would prefer it to be concentrated to a few sites and towns. Roughly half of business respondents would like the community in which their business is located to become a primary destination, while the other half would prefer it to be a minor destination (39.6%) or not a destination (11.7%).

**APPENDIX 1**  
**RESIDENT SURVEY MATERIALS**



April 13, 2004

Dear Piscataquis County Resident:

A variety of issues will affect the future of Piscataquis County as a place to live and work. The purpose of this survey is to learn what residents want for the future and to suggest strategies for reaching those goals. This survey is being conducted by University of Maine researchers and a group of local officials from Piscataquis County.

You are one of a small number of residents being asked to give your opinions on these issues. Your name was drawn as part of a sample of registered voters in Brownville, Dover-Foxcroft, Greenville, and Milo. In order for this survey to truly represent the thinking of area residents, it is important that each questionnaire be completed and returned.

Completing this survey should take about 20 minutes. Except for your time and inconvenience, there are no known risks in participating. Your participation is voluntary and you do not have to answer questions you don't want to. Returning the questionnaire will mean that you agree to participate. Your responses will remain confidential.

After you have completed the questionnaire, please mail it to us in the postage-paid envelope provided. Do not put your name on the questionnaire. The number stamped on the questionnaire allows us to know you returned it. Your name will not be connected with your answers.

The results of the survey will be publicly available and will be given to local town officials. They need your opinions to help them make decisions about the future of Piscataquis County.

Please complete and return the questionnaire by Monday, April 26, 2004. If you have any questions about the survey, please contact Eva McLaughlin at (207) 581-1646 or email [eva.mclaughlin@umit.maine.edu](mailto:eva.mclaughlin@umit.maine.edu). If you have any questions about your rights as a research participant, please contact Gayle Anderson, Assistant to the University of Maine's Protection of Human Subjects Review Board, at (207) 581-1498 or [gayle.anderson@umit.maine.edu](mailto:gayle.anderson@umit.maine.edu).

Thank you for your participation.

Sincerely,

Charles E. Morris  
Senior Research Associate



## Follow-up Postcard

A few weeks ago, a questionnaire seeking your opinions on tourism development in Piscataquis County was mailed to you. Your name was drawn in a sample of Piscataquis County registered voters.

Our records indicate that you have not yet returned the survey to us. Please do so today. Because it has been sent to only a small, but representative, sample of Piscataquis County voters, it is extremely important that your opinions are included in the study.

If by some chance you did not receive the questionnaire, or it got misplaced, please call me at 581-1646 and I will send you another one today.

Sincerely,

Eva McLaughlin  
Project Director



May 24, 2004

Dear Piscataquis County Resident:

About a month ago, I wrote to you seeking your opinions on tourism development in Piscataquis County. As of today, our records indicate that we have not yet received your completed questionnaire.

The University of Maine is working with a group of local officials to collect information on local attitudes toward tourism. The purpose of this survey is to learn what residents want for the future and to suggest strategies for reaching those goals.

I am writing to you again because of the importance that each questionnaire has to the future of Piscataquis County as a place to live and work. Your name was drawn as a part of a random sample of registered voters in Brownville, Dover-Foxcroft, Greenville, and Milo. In order for the results of our study to truly represent the opinions of these area residents, it is essential that each questionnaire be completed and returned.

In the event that your original questionnaire has been misplaced, I am enclosing a replacement questionnaire for you to complete and return in the enclosed postage-paid envelope.

Completing this questionnaire should take about 20 minutes of your time. Your participation is voluntary and you do not have to answer any questions you don't want to. Except for your time and inconvenience, there are no risks in participating. Returning the questionnaire means you agree to participate. Your responses will remain confidential.

Please complete and return the questionnaire as soon as possible. If you have any questions about the survey, please contact Eva McLaughlin at 581-1646, or email [eva.mclaughlin@umit.maine.edu](mailto:eva.mclaughlin@umit.maine.edu). If you have any questions about your rights as a research participant, please contact Gayle Anderson, Assistant to the University of Maine's Protection of Human Subjects Review Board, 581-1498, [gayle.anderson@umit.maine.edu](mailto:gayle.anderson@umit.maine.edu).

Thank you,

Charles E. Morris  
Project Director

# Piscataquis County Resident Survey

This survey is being conducted by the Margaret Chase Smith Center for Public Policy and the Department of Resource Economics and Policy at The University of Maine. It is being conducted in partnership with town managers and community and economic developers in Piscataquis County.

The survey is designed to find out how residents feel about tourism development in Piscataquis County. The information from this survey will be used to help identify what residents want for the future and to suggest plans and solutions to bring about sustainable economic growth for the area.

Completing the questionnaire should take about 20 minutes of your time. Your participation in this survey is voluntary and you do not have to answer any questions you don't want to. Do not put your name or other identifying marks on the questionnaire. The number stamped on the questionnaire allows us to know that you returned the questionnaire. Your name will not be connected to your answers.

Because this survey has been sent to only a small, but representative, sample of Piscataquis County registered voters, it is important that your opinions are included. After you have completed the questionnaire, please mail it to us in the postage-paid envelope provided.

Thank you for your help.

*First, we'd like to ask you some general questions about your background and interests.*

1. How many years have you lived in: *(write your answer in the spaces below)*

Piscataquis County? \_\_\_\_ years

Maine? \_\_\_\_ years

2. People choose to live where they do for a variety of reasons. Please indicate how important each of the following characteristics is to you in terms of where you choose to live.

<i>(rate each characteristic)</i>	very important	important	neutral	somewhat important	not important	don't know
A. Good place to raise a family	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Strong sense of community	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Strong local cultural heritage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Good entertainment opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E. Pleasant natural setting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
F. Good outdoor recreation opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
G. Clean air and water	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
H. Lots of open space	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I. Good local schools	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
J. Access to adult education	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
K. Good local job opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
L. Low cost of living	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
M. Lots of privacy from neighbors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
N. Low crime rate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

*The following questions are about outdoor recreation activities.*

**3. Which of the following outdoor recreation activities do you enjoy?** *(check all that apply)*

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> Snowmobiling     | <input type="checkbox"/> Hiking        | <input type="checkbox"/> Ice fishing          |
| <input type="checkbox"/> ATV riding       | <input type="checkbox"/> Bird watching | <input type="checkbox"/> Downhill skiing      |
| <input type="checkbox"/> Fishing          | <input type="checkbox"/> Walking       | <input type="checkbox"/> Kayaking/canoeing    |
| <input type="checkbox"/> Hunting          | <input type="checkbox"/> Motor boating | <input type="checkbox"/> Cross-country skiing |
| <input type="checkbox"/> Camping          | <input type="checkbox"/> Snowshoeing   | <input type="checkbox"/> Rock climbing        |
| <input type="checkbox"/> Horseback riding | <input type="checkbox"/> Backpacking   |   |
| <input type="checkbox"/> Mountain biking  | <input type="checkbox"/> Dog sledding  | <input type="checkbox"/> None of the above    |

**4. During the past twelve months, about how many times did you go to the following locations for the recreation activities you checked in question 3?**

<i>(check one for each location)</i>	0 times	1-5 times	6-10 times	11 or more times	don't know
A. My community	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Another community in Piscataquis County	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Other counties in Maine	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Outside of Maine	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**5. Please indicate your support for the following strategies to attract more visitors to Piscataquis County.**

<i>(check one for each strategy)</i>	strongly support	support	neutral	oppose	strongly oppose	don't know
A. Increase promotion of outdoor recreation opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Increase signs and maps to direct tourists to recreation sites	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Increase grooming of snowmobile trails through user fees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Build parking areas and provide restrooms at recreation sites	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E. Secure public access to boat launches on local waterways	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**6. Which of the strategies above (A – E) is most important for Piscataquis County?** *(write letter)* \_\_\_\_\_

**7. How would you like the current level of each recreation activity to change in coming years?**

<i>(check one for each activity)</i>	increase	stay the same	decrease	don't know
A. Cross-country skiing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Camping and hiking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Snowmobiling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Kayaking and canoeing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E. Motor boating	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
F. Snowshoeing and dog sledding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
G. ATV riding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Next, we'd like to ask you about other interests and activities.

8. Which of the following activities do you enjoy? (check all that apply)

- |  |  |
|--|--|
| <input type="checkbox"/> Visiting historic sites             | <input type="checkbox"/> Attending recreation or sporting events (fishing derbies, bike races, etc.) |
| <input type="checkbox"/> Visiting museums or galleries       |  |
| <input type="checkbox"/> Visiting artist or crafter studios  | <input type="checkbox"/> Attending public parades, festivals, county fairs, or holiday celebrations  |
| <input type="checkbox"/> Attending live musical performances |  |
| <input type="checkbox"/> Attending auctions                  | <input type="checkbox"/> None of the above   |
| <input type="checkbox"/> Attending art or craft fairs        |  |

9. During the past twelve months, about how many times did you go to the following locations for the activities you checked in question 8?

(check one for each location)	0 times	1-5 times	6-10 times	11 or more times	don't know
A. My community	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Another community in Piscataquis County	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Other counties in Maine	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Outside of Maine	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

10. Please indicate your support for the following strategies to attract more visitors to Piscataquis County.

(check one for each strategy)	strongly support	support	neutral	oppose	strongly oppose	don't know
A. Promote the area's history and culture to attract more tourists	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Open a regional cultural center such as a theater or museum	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Provide financial help to artists and crafters who want to start a business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Increase public awareness of the area's history, arts, and traditional crafts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

11. Which of the strategies above (A – D) is most important for Piscataquis County? (write letter) \_\_\_\_\_

12. How would you like the current level of local events to change in coming years?

(check one for each activity)	increase	stay the same	decrease	don't know
A. Live musical performances	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Live theatre performances	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Arts and crafts fairs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Local festivals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E. Local sporting events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
F. Open houses at art and craft studios	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

*Now, we'd like to ask your opinion about the effects of tourism. There are no right or wrong answers.*

13. Please indicate how much you agree or disagree with the following statements about the impacts of tourism on the local economy.

<i>(rate each statement)</i>	strongly agree	agree	neutral	disagree	strongly disagree	don't know
A. Most of the businesses involved in tourism are small	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Tourism only helps businesses that sell directly to tourists	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Tourism does not provide the kinds of jobs our area needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Tourism provides mostly low-paying, seasonal jobs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E. Tourism contributes to local tax revenues, thus lowering local tax bills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
F. Tourism increases the local cost of living	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

14. Please indicate how much you agree or disagree with the following statements about the impacts of tourism on local communities.

<i>(rate each statement)</i>	strongly agree	agree	neutral	disagree	strongly disagree	don't know
A. Tourism provides services/activities we wouldn't otherwise have	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Environmental impacts from tourism are relatively minor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Tourist attractions/facilities improve a community's appearance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Tourism reduces the quality of outdoor recreation opportunities due to overuse and crowding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E. Tourism increases crime	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
F. Tourism makes the area more crowded and threatens privacy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
G. Tourists and local residents get along well with each other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
H. Tourism facilities will restrict my access to area lakes, forests and open spaces	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

15. Please indicate how much you agree or disagree with the following statements about the potential impacts of tourism on Piscataquis County.

<i>Increased tourism in Piscataquis County will:</i> <i>(rate each statement)</i>	strongly agree	agree	neutral	disagree	strongly disagree	don't know
A. Preserve local culture and heritage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Preserve land and natural resources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Increase sales to local businesses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Improve the overall quality of life of residents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E. Increase in-migration by new residents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
F. Result in over development of land	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
G. Improve job opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
H. Improve local municipal services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

16. Please indicate your support for the following tourism based economic development strategies.

<i>(check one for each strategy)</i>	strongly support	support	neutral	oppose	strongly oppose	don't know
A. Provide assistance to local residents and businesses that sell goods and services to tourists	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Recruit outside investors who have experience promoting tourism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Attract outside investors to build a large resort and/or corporate conference center	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Offer adult education courses on hotel and restaurant management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E. Plan more public events to attract tourists to the area	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
F. Develop a county-wide tourism management plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
G. Attract seasonal residents who purchase second homes in the area	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

17. Which of the strategies above (A – G) is most important for Piscataquis County? *(write letter)* \_\_\_\_\_

*Attracting more tourists to the area could require changes in the way land is used. Some land could be developed to offer more recreation opportunities and some could be protected to preserve natural and historic areas.*

18. Please indicate your support for each land-use strategy.

<i>(check one for each strategy)</i>	strongly support	support	neutral	oppose	strongly oppose	don't know
A. Manage residential and commercial development on land near to....						
<i>Snowmobile trails</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Lakes and waterways</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Historic sites</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Hiking trails</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Protect land for public recreation use through....						
<i>Local zoning</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Outright purchases</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Conservation easements</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Support trail systems that are....						
<i>Exclusively for motorized use</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Exclusively for non-motorized use</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Mixed non-motorized and motorized use</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Protect cultural-heritage resources through....						
<i>Historic zoning</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Restoration of historic buildings</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Standards for new buildings</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

19. Would you prefer tourism in Piscataquis County to be concentrated to a few towns and sites or spread out to many towns and sites? *(check one)*

☐ Concentrated to a few towns and sites

☐ Spread out to many towns and sites

☐ Don't know

20. Among the towns in Piscataquis County, would you like the town in which you live to become a primary tourist destination, a minor tourist destination, or not a tourist destination? *(check one)*

☐ Become a primary tourist destination

☐ Become a minor tourist destination

☐ Not a tourist destination

21. Overall, how important should tourism be to the future of Piscataquis County? *(check one)*

☐ Very Important

☐ Important

☐ Somewhat Important

☐ Not Important

22. Are there any aspects of Piscataquis County (places, events, etc.) that you would not want to promote as tourist attractions? *(please list)*

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*Finally, we would like to ask a few questions about yourself.*

23. What is your sex? *(check one)*

☐ male

☐ female

24. In what year were you born: 19 \_\_\_\_

25. How many people currently live in your household? \_\_\_\_\_ people

26. How many of those people are under the age of 18? \_\_\_\_\_ people

27. Which of the following best describes your level of education so far? *(check one)*

☐ some high school, no diploma

☐ 2-year college/vocational graduate

☐ high school graduate/GED

☐ 4-year college graduate

☐ some college, no degree

☐ post-college graduate or professional degree



28. Which of the following best describes your current work status? *(check one)*

- |   |  |
|---|--|
| <input type="checkbox"/> work full-time     | <input type="checkbox"/> take care of home or family full-time |
| <input type="checkbox"/> work part-time     | <input type="checkbox"/> student                               |
| <input type="checkbox"/> work seasonal jobs | <input type="checkbox"/> retired                               |
| <input type="checkbox"/> self-employed      | <input type="checkbox"/> out of work                           |

29. Do you work in Piscataquis County or do you work outside the county? *(check one)*

- ☐ work in Piscataquis County    ☐ work outside the county    ☐ don't work

30. Do you own a business in Piscataquis County? *(check one)*

- ☐ yes    ☐ no

31. About how much land do you own in Piscataquis County? *(check one)*

- ☐ none    ☐ less than 1 acre    ☐ 1-10 acres    ☐ 11-20 acres    ☐ more than 20 acres

32. Do you own a camp in addition to your primary residence? *(check one)*

- ☐ yes    ☐ no

33. During the past 12 months, in which of the following civic activities have you participated?

*(check all that apply)*

- |   |  |
|---|--|
| <input type="checkbox"/> member of a local civic/fraternal organization | <input type="checkbox"/> serve on a town committee |
| <input type="checkbox"/> member of a sporting/recreation club           | <input type="checkbox"/> member of a church group  |
| <input type="checkbox"/> member of an environmental club                | <input type="checkbox"/> voting                    |
| <input type="checkbox"/> other: (please list) _____                     |  |

34. During the past 12 months, what was the combined income for the members of your household?

*(check one)*

- |  |  |  |  |
|--|--|--|--|
| <input type="checkbox"/> Less than \$10,000  | <input type="checkbox"/> \$15,000 - \$24,999 | <input type="checkbox"/> \$35,000 - \$49,999 | <input type="checkbox"/> \$75,000 - \$99,999 |
| <input type="checkbox"/> \$10,000 - \$14,999 | <input type="checkbox"/> \$25,000 - \$34,999 | <input type="checkbox"/> \$50,000 - \$74,999 | <input type="checkbox"/> \$100,000 or more   |

If you have any other comments you would like to make about tourism development in Piscataquis County, please write them on the space provided on the back page of the questionnaire.

Thank you for completing the questionnaire. Please mail the completed questionnaire in the enclosed postage-paid return envelope.

If you have further comments or opinions about tourism development in Piscataquis County that you would like to share with us, please write them below.

Thank you again for taking the time to complete this questionnaire.

## **APPENDIX 2**

### **BUSINESS SURVEY MATERIALS**



June 10, 2004

Dear Piscataquis County Business Owner:

A variety of issues will affect the future of Piscataquis County as a place to live and work. The purpose of this survey is to learn what the business community wants for the future and to suggest strategies for reaching those goals. This survey is being conducted by University of Maine researchers and a group of local officials from Piscataquis County.

You are one of a select group of business owners being asked to give your opinions on these issues. Your business was drawn from a list of businesses in Piscataquis County. In order for this survey to truly represent the Piscataquis County business community, it is important that each questionnaire be completed and returned.

Completing this survey should take about 15 minutes. Except for your time and inconvenience, there are no known risks in participating. Your participation is voluntary and you do not have to answer questions you don't want to. Returning the questionnaire will mean that you agree to participate. Your responses will remain confidential.

After you have completed the questionnaire, please mail it to us in the postage-paid envelope provided. Do not put your name on the questionnaire. The number stamped on the questionnaire allows us to know you returned it. Your name will not be connected with your answers.

The results of the survey will be publicly available and will be given to local town officials. They are interested in hearing your opinions in order to help make decisions.

Please complete and return the questionnaire by Monday, June 21, 2004. If you have any questions about the survey, please contact Eva McLaughlin at (207) 581-1646 or email [eva.mclaughlin@unit.maine.edu](mailto:eva.mclaughlin@unit.maine.edu). If you have any questions about your rights as a research participant, please contact Gayle Anderson, Assistant to the University of Maine's Protection of Human Subjects Review Board, at (207) 581-1498 or [gayle.anderson@umit.maine.edu](mailto:gayle.anderson@umit.maine.edu).

Thank you for your participation.

Charles E. Morris  
Senior Research Associate

## Follow-up Postcard

June, 2004

A few weeks ago, a questionnaire seeking your opinions on tourism development in Piscataquis County was mailed to you. Your name was drawn in a sample of Piscataquis County businesses.

Our records indicate that you have not yet returned the survey to us. Please do so today. Because it has been sent to a select group of businesses, it is extremely important that your opinions are included in the study.

If by some chance you did not receive the questionnaire, or it got misplaced, please call me at 581-1646 and I will send you another one today.

Sincerely,

Eva McLaughlin  
Project Director



July 9, 2004

Dear Piscataquis County Business Owner:

About a month ago, I wrote to you seeking your opinions on tourism development in Piscataquis County. As of today, our records indicate that we have not yet received your completed questionnaire.

The University of Maine is working with a group of local officials to collect information on local attitudes toward tourism. The purpose of this survey is to learn what the business community wants for the future and to suggest strategies for reaching those goals.

I am writing to you again because of the importance that each questionnaire has to the future of Piscataquis County as a place to live and work. You are one of a select group of business owners being asked to give your opinions on these issues. In order for the results of our study to truly represent the Piscataquis County business community, it is essential that each questionnaire be completed and returned.

In the event that your original questionnaire has been misplaced, I am enclosing a replacement questionnaire for you to complete and return in the enclosed postage-paid envelope.

Completing this questionnaire should take about 20 minutes of your time. Your participation is voluntary and you do not have to answer any questions you don't want to. Except for your time and inconvenience, there are no risks in participating. Returning the questionnaire means you agree to participate. Your responses will remain confidential.

Please complete and return the questionnaire as soon as possible. If you have any questions about the survey, please contact Eva McLaughlin at 581-1646, or email [eva.mclaughlin@umit.maine.edu](mailto:eva.mclaughlin@umit.maine.edu). If you have any questions about your rights as a research participant, please contact Gayle Anderson, Assistant to the University of Maine's Protection of Human Subjects Review Board, 581-1498, [gayle.anderson@umit.maine.edu](mailto:gayle.anderson@umit.maine.edu).

Thank you,

Charles E. Morris  
Senior Research Associate

# Piscataquis County Business Survey

This survey is being conducted by the Margaret Chase Smith Center for Public Policy and the Department of Resource Economics and Policy at The University of Maine. It is being conducted in partnership with town managers and community and economic developers in Piscataquis County.

The survey is designed to find out how the business community feels about tourism development in Piscataquis County. The information from this survey will be used to help identify what residents want for the future and to suggest plans and solutions to bring about sustainable economic growth for the area.

Completing the questionnaire should take about 20 minutes of your time. Your participation in this survey is voluntary and you do not have to answer any questions you don't want to. Do not put your name or other identifying marks on the questionnaire. The number stamped on the questionnaire allows us to know that you returned the questionnaire. Your name will not be connected to your answers.

This survey has been sent to most businesses in Piscataquis County. It is important that your opinions are included. After you have completed the questionnaire, please mail it to us in the postage-paid envelope provided.

Thank you for your help.

*First, we'd like to ask you some general questions about your business (organization).*

1. How many years has your business operated in Piscataquis County? \_\_\_\_\_ years
2. Which of the following best describes the *ownership structure* of your business: (check one)
  - ☐ Proprietorship or partnership (any form)
  - ☐ Non-profit organization
  - ☐ Privately-owned corporation
  - ☐ Other (please specify) \_\_\_\_\_
  - ☐ Publicly-owned corporation
3. Is your business a single establishment firm or part of a multi-establishment firm? (check one)
  - ☐ Single establishment firm
  - ☐ Multi-establishment firm
4. Including yourself, about how many people in total did your business employ in 2003 and in 1998?  
(write numbers in spaces below)  
\_\_\_\_\_ 2003 total employees                      \_\_\_\_\_ 1998 total employees
5. During 2003, about how many of your employees were: (write numbers in spaces below)  
\_\_\_\_\_ Year round full-time employees in 2003  
\_\_\_\_\_ Year round part-time employees in 2003  
\_\_\_\_\_ Seasonal employees in 2003
6. Does your business experience substantial seasonal fluctuations in sales? (check one)
  - ☐ Yes
  - ☐ No

7. In which of the following ways does your business respond to seasonal fluctuations? *(check all that apply)*

- ☐ Do not experience seasonal fluctuations
 ☐ Hire and fire/layoff employees  
☐ Increase and decrease employee hours
 ☐ Close during the off-season  
☐ Other: *(please list)* \_\_\_\_\_

*Local communities have considered many strategies, including tourism, for increasing business opportunities in Piscataquis County.*

8. Please indicate your support for each strategy.

*(check one for each strategy)*

	strongly support	support	neutral	oppose	strongly oppose	don't know
A. Assist local residents to improve their job skills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Assist local residents to develop and operate small businesses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Strengthen technology and telecommunications countywide	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Offer financial incentives to attract and retain businesses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E. Expand national marketing to attract new businesses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
F. Expand tourism promotion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

9. Which of the strategies above (A – F) is most important for your business? *(write letter)* \_\_\_\_\_

10. How important is tourism to the success of your business? *(check one)*

- ☐ Very Important
 ☐ Important
 ☐ Somewhat Important
 ☐ Not Important

11. About what percent of your gross sales revenues in 2003 is related to tourism?

\_\_\_\_\_ % Sales related to tourism

12. How important is tourism to the overall business environment in Piscataquis County? *(check one)*

- ☐ Very Important
 ☐ Important
 ☐ Somewhat Important
 ☐ Not Important

13. Please indicate your support for the following strategies to attract more visitors to Piscataquis County.

*(check one for each strategy)*

	strongly support	support	neutral	oppose	strongly oppose	don't know
A. Increase promotion of outdoor recreation opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Increase signs and maps to direct tourists to recreation sites	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Implement user fees to support grooming of snowmobile trails	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Build parking areas and provide restrooms at recreation sites	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E. Secure public access to boat launches on local waterways	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

14. Which of the strategies above (A – E) is most important for Piscataquis County? *(write letter)* \_\_\_\_\_



15. How would you like the current level of each recreation activity to change in coming years?

<i>(check one for each activity)</i>	increase	stay the same	decrease	don't know
A. Cross-country skiing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Camping and hiking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Snowmobiling	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Kayaking and canoeing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E. Motor boating	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
F. Snowshoeing and dog sledding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
H. ATV riding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

16. Please indicate your support for the following strategies to attract more visitors to Piscataquis County.

<i>(check one for each strategy)</i>	strongly support	support	neutral	oppose	strongly oppose	don't know
A. Promote the area's history and culture to attract more tourists	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Open a regional cultural center such as a theater or museum	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Provide financial help to artists and crafters who want to start a business	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Increase public awareness of the area's history, arts, and traditional crafts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

17. Which of the strategies above (A – D) is most important for Piscataquis County? *(write letter)* \_\_\_\_\_

18. How would you like the current level of local events to change in coming years?

<i>(check one for each activity)</i>	increase	stay the same	decrease	don't know
A. Live musical performances	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Live theatre performances	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Arts and crafts fairs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Local festivals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E. Local sporting events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
F. Open houses at art and craft studios	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

*Now, we'd like to ask your opinion about the effects of tourism. There are no right or wrong answers.*

19. Please indicate how much you agree or disagree with the following statements about the impacts of tourism on the local economy.

<i>(rate each statement)</i>	strongly agree	agree	neutral	disagree	strongly disagree	don't know
A. Most of the businesses involved in tourism are small	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Tourism only helps businesses that sell directly to tourists	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Tourism does not provide the kinds of jobs our area needs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Tourism provides mostly low-paying, seasonal jobs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E. Tourism contributes to local tax revenues, thus lowering local tax bills	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
F. Tourism increases the local cost of living	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

20. Please indicate how much you agree or disagree with the following statements about the impacts of tourism on local communities.

<i>(rate each statement)</i>	strongly agree	agree	neutral	disagree	strongly disagree	don't know
A. Tourism provides services/activities we wouldn't otherwise have	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Environmental impacts from tourism are relatively minor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Tourist attractions/facilities improve a community's appearance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Tourism reduces the quality of outdoor recreation opportunities due to overuse and crowding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E. Tourism increases crime	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
F. Tourism makes the area more crowded and threatens privacy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
G. Tourists and local residents get along well with each other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
H. Tourism facilities will restrict my access to area lakes, forests and open spaces	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

21. Please indicate how much you agree or disagree with the following statements about the potential impacts of tourism on Piscataquis County.

<i>Increased tourism in Piscataquis County will:</i> <i>(rate each statement)</i>	strongly agree	agree	neutral	disagree	strongly disagree	don't know
A. Preserve local culture and heritage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Preserve land and natural resources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Increase sales to local businesses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Improve the overall quality of life of residents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E. Increase in-migration by new residents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
F. Result in over development of land	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
G. Improve job opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
H. Improve local municipal services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

22. Please indicate your support for the following tourism based economic development strategies.

<i>(check one for each strategy)</i>	strongly support	support	neutral	oppose	strongly oppose	don't know
A. Provide assistance to local residents and businesses that sell goods and services to tourists	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Recruit outside investors who have experience promoting tourism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Attract outside investors to build a large resort and/or corporate conference center	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Offer adult education courses on hotel and restaurant management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E. Plan more public events to attract tourists to the area	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
F. Develop a county-wide tourism management plan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
G. Attract seasonal residents who purchase second homes in the area	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

23. Which of the strategies above (A – G) is most important for Piscataquis County? *(write letter)* \_\_\_\_\_

*Attracting more tourists to the area could require changes in how land is used. Some land could be developed to offer more recreation opportunities and some could be protected to preserve natural and historic areas.*

**24. Please indicate your support for each land-use strategy.**

*(check one for each strategy)*

	strongly support	support	neutral	oppose	strongly oppose	don't know
A. Manage residential and commercial development on land near to....						
<i>Snowmobile trails</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Lakes and waterways</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Historic sites</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Hiking trails</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
B. Protect land for public recreation use through....						
<i>Local zoning</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Outright purchases</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Conservation easements</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
C. Support trail systems that are....						
<i>Exclusively for motorized use</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Exclusively for non-motorized use</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Mixed non-motorized and motorized use</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
D. Protect cultural-heritage resources through....						
<i>Historic zoning</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Restoration of historic buildings</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<i>Standards for new buildings</i>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**25. Would you prefer tourism in Piscataquis County to be concentrated to a few towns and sites or spread out to many towns and sites? *(check one)***

- ☐ Concentrated to a few towns and sites      ☐ Spread out to many towns and sites      ☐ Don't know

**26. Among towns in Piscataquis County, would you like the town where your business is located to become a primary tourist destination, a minor tourist destination, or not a tourist destination? *(check one)***

- ☐ Become a primary tourist destination      ☐ Become a minor tourist destination      ☐ Not a tourist destination

**27. Are there any aspects of Piscataquis County (places, events, etc.) that you would not want to promote as tourist attractions? *(please list)***

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*If you have any other comments you would like to make about tourism in Piscataquis County, please write them on space provided on the back page of the questionnaire.*

**Thank you for completing the questionnaire. Please mail the completed questionnaire in the enclosed postage-paid return envelope.**

*If you have any further comments or opinions about tourism in Piscataquis County that you would like to share with us, please write them below.*

Thank you again for taking the time to complete this questionnaire.

### **APPENDIX 3**

#### **RESIDENT SURVEY OVERALL RESPONSES**

# Piscataquis County Resident Survey

## *Aggregate Survey Responses*

This survey is being conducted by the Margaret Chase Smith Center for Public Policy and the Department of Resource Economics and Policy at The University of Maine. It is being conducted in partnership with town managers and community and economic developers in Piscataquis County.

The survey is designed to find out how residents feel about tourism development in Piscataquis County. The information from this survey will be used to help identify what residents want for the future and to suggest plans and solutions to bring about sustainable economic growth for the area.

Completing the questionnaire should take about 20 minutes of your time. Your participation in this survey is voluntary and you do not have to answer any questions you don't want to. Do not put your name or other identifying marks on the questionnaire. The number stamped on the questionnaire allows us to know that you returned the questionnaire. Your name will not be connected to your answers.

Because this survey has been sent to only a small, but representative, sample of Piscataquis County registered voters, it is important that your opinions are included. After you have completed the questionnaire, please mail it to us in the postage-paid envelope provided.

Thank you for your help.

*First, we'd like to ask you some general questions about your background and interests.*

**1. How many years have you lived in:**

	Mean	Median	1-5 yrs	6-10 yrs	11-20 yrs	21 yrs or more
Piscataquis County? (n=390)	37.4 yrs	36.5 yrs	10.8%	6.4%	13.3%	69.5%
Maine? (n=373)	45.1 yrs	50 yrs	4.3%	4.8%	8.3%	82.6%

**2. People choose to live where they do for a variety of reasons. Please indicate how important each of the following characteristics is to you in terms of where you choose to live.**

	very important	important	neutral	somewhat important	not important	don't know
A. Good place to raise a family (n=393)	73.0%	19.1%	4.1%	1.3%	2.3%	0.3%
B. Strong sense of community (n=385)	34.8%	49.9%	8.8%	3.9%	1.8%	0.8%
C. Strong local cultural heritage (n=381)	20.2%	34.9%	27.0%	11.0%	5.5%	1.3%
D. Good entertainment opportunities (n=371)	11.9%	28.6%	26.1%	19.7%	12.4%	1.3%
E. Pleasant natural setting (n=390)	51.8%	40.5%	3.6%	3.3%	0.8%	0.0%
F. Good outdoor recreation opportunities (n=385)	44.4%	40.5%	5.7%	6.8%	2.3%	0.3%
G. Clean air and water (n=394)	75.9%	22.3%	1.3%	0.3%	0.3%	0.0%
H. Lots of open space (n=385)	57.4%	33.8%	4.7%	3.1%	1.0%	0.0%
I. Good local schools (n=388)	57.0%	27.1%	10.3%	1.8%	3.1%	0.8%
J. Access to adult education (n=385)	26.8%	39.5%	17.9%	7.5%	8.1%	0.3%
K. Good local job opportunities (n=388)	51.0%	28.6%	12.1%	3.6%	3.3%	1.3%
L. Low cost of living (n=391)	44.5%	37.9%	10.7%	4.9%	1.5%	0.5%
M. Lots of privacy from neighbors (n=394)	36.5%	37.3%	14.5%	8.9%	2.8%	0.0%
N. Low crime rate (n=395)	70.4%	26.1%	2.3%	1.0%	0.3%	0.0%

*The following questions are about outdoor recreation activities.*

**3. Which of the following outdoor recreation activities do you enjoy? (n=396)**

34.8% Snowmobiling	40.9% Hiking	30.1% Ice fishing
21.7% ATV riding	40.2% Bird watching	12.9% Downhill skiing
51.3% Fishing	79.8% Walking	37.4% Kayaking/canoeing
36.9% Hunting	33.3% Motor boating	23.2% Cross-country skiing
52.2% Camping	27.0% Snowshoeing	3.8% Rock climbing
8.3% Horseback riding	10.6% Backpacking	
10.9% Mountain biking	1.5% Dog sledding	3.5% None of the above

**4. During the past twelve months, about how many times did you go to the following locations for the recreation activities you checked in question 3?**

	0 times	1-5 times	6-10 times	11 or more times	don't know
A. My community (n=378)	11.6%	21.2%	15.9%	48.4%	2.9%
B. Another community in Piscataquis County (n=330)	34.2%	31.2%	17.6%	13.9%	3.0%
C. Other counties in Maine (n=329)	39.5%	43.8%	8.8%	4.3%	3.6%
D. Outside of Maine (n=396)	64.2%	28.7%	1.2%	4.0%	1.8%

**5. Please indicate your support for the following strategies to attract more visitors to Piscataquis County.**

	strongly support	support	neutral	oppose	strongly oppose	don't know
A. Increase promotion of outdoor recreation opportunities (n=380)	39.2%	42.4%	10.5%	3.7%	2.1%	2.1%
B. Increase signs and maps to direct tourists to recreation sites (n=381)	31.8%	43.6%	15.5%	4.2%	2.6%	2.4%
C. Increase grooming of snowmobile trails through user fees (n=381)	23.1%	28.9%	29.6%	8.9%	4.2%	5.2%
D. Build parking areas and provide restrooms at recreation sites (n=382)	26.7%	39.5%	21.5%	7.1%	2.6%	2.6%
E. Secure public access to boat launches on local waterways (n=381)	28.3%	42.1%	18.1%	5.0%	1.8%	4.5%

**6. Which of the strategies above (A – E) is most important for Piscataquis County? (n=312)**

A = 54.5%      B = 14.4%      C = 6.4%      D = 10.9%      E = 13.8%

7. How would you like the current level of each recreation activity to change in coming years?

	increase	stay the same	decrease	don't know
A. Cross-country skiing (n=379)	53.3%	30.1%	0.8%	15.8%
B. Camping and hiking (n=375)	59.2%	32.5%	0.8%	7.5%
C. Snowmobiling (n=375)	25.6%	49.3%	15.7%	9.3%
D. Kayaking and canoeing (n=371)	50.4%	36.1%	0.8%	12.7%
E. Motor boating (n=375)	16.3%	53.1%	18.7%	12.0%
F. Snowshoeing and dog sledding (n=370)	42.4%	39.2%	2.2%	16.2%
G. ATV riding (n=377)	18.0%	30.5%	39.3%	12.2%

Next, we'd like to ask you about other interests and activities.

8. Which of the following activities do you enjoy? (n=394)

66.8% Visiting historic sites	77.2% Attending recreation or sporting events (fishing derbies, bike races, etc.)
50.0% Visiting museums or galleries	
35.0% Visiting artist or crafter studios	31.5% Attending public parades, festivals, county fairs, or holiday celebrations
58.9% Attending live musical performances	
36.5% Attending auctions	
59.1% Attending art or craft fairs	3.8% None of the above

9. During the past twelve months, about how many times did you go to the following locations for the activities you checked in question 8?

	0 times	1-5 times	6-10 times	11 or more times	don't know
A. My community (n=372)	11.6%	65.1%	15.3%	7.0%	1.1%
B. Another community in Piscataquis County (n=338)	29.6%	57.1%	8.9%	2.1%	2.4%
C. Other counties in Maine (n=348)	34.5%	52.0%	7.5%	4.3%	1.7%
D. Outside of Maine (n=339)	54.6%	37.5%	4.1%	2.4%	1.5%

10. Please indicate your support for the following strategies to attract more visitors to Piscataquis County.

	strongly support	support	neutral	oppose	strongly oppose	don't know
A. Promote the area's history and culture to attract more tourists (n=377)	31.6%	41.6%	16.4%	4.0%	1.6%	4.8%
B. Open a regional cultural center such as a theater or museum (n=375)	24.0%	34.7%	27.2%	5.6%	2.4%	6.1%
C. Provide financial help to artists and crafters who want to start a business (n=367)	15.5%	28.6%	35.4%	10.6%	4.1%	5.7%
D. Increase public awareness of the area's history, arts, and traditional crafts (n=370)	32.4%	45.7%	14.3%	2.2%	1.1%	4.3%

11. Which of the strategies above (A – D) is most important for Piscataquis County? (n=302)

A = 34.4 %

B = 20.9%

C = 11.9%

D = 32.8%



**12. How would you like the current level of local events to change in coming years?**

	increase	stay the same	decrease	don't know
A. Live musical performances (n=381)	66.4%	21.0%	2.1%	10.5%
B. Live theatre performances (n=368)	51.6%	29.6%	2.7%	16.0%
C. Arts and crafts fairs (n=374)	40.4%	50.0%	1.9%	7.8%
D. Local festivals (n=378)	54.2%	36.5%	2.1%	7.1%
E. Local sporting events (n=374)	45.2%	42.0%	3.2%	9.6%
F. Open houses at art and craft studios (n=374)	38.2%	46.3%	2.4%	13.1%

*Now, we'd like to ask your opinion about the effects of tourism. There are no right or wrong answers.*

**13. Please indicate how much you agree or disagree with the following statements about the impacts of tourism on the local economy.**

	strongly agree	agree	neutral	disagree	strongly disagree	don't know
A. Most of the businesses involved in tourism are small (n=383)	17.0%	55.9%	7.6%	9.7%	2.1%	7.8%
B. Tourism only helps businesses that sell directly to tourists (n=377)	5.6%	19.9%	11.9%	45.9%	10.6%	6.1%
C. Tourism does not provide the kinds of jobs our area needs (n=381)	16.5%	29.4%	16.0%	26.0%	7.3%	4.7%
D. Tourism provides mostly low-paying, seasonal jobs (n=381)	18.4%	45.7%	12.3%	14.2%	2.8%	6.6%
E. Tourism contributes to local tax revenues, thus lowering local tax bills (n=385)	11.9%	34.0%	17.4%	16.4%	7.3%	13.0%
F. Tourism increases the local cost of living (n=382)	9.9%	19.9%	22.3%	30.1%	4.7%	13.1%

**14. Please indicate how much you agree or disagree with the following statements about the impacts of tourism on local communities.**

	strongly agree	agree	neutral	disagree	strongly disagree	don't know
A. Tourism provides services/activities we wouldn't otherwise have (n=383)	14.1%	48.3%	16.4%	14.4%	1.0%	5.7%
B. Environmental impacts from tourism are relatively minor (n=382)	4.2%	34.8%	17.5%	30.1%	6.0%	7.3%
C. Tourist attractions/facilities improve a community's appearance (n=378)	9.5%	53.2%	20.6%	9.8%	2.4%	4.5%
D. Tourism reduces the quality of outdoor recreation opportunities due to overuse and crowding (n=382)	7.9%	23.3%	22.3%	37.7%	2.9%	6.0%
E. Tourism increases crime (n=383)	3.7%	19.6%	23.0%	40.2%	2.6%	11.0%
F. Tourism makes the area more crowded and threatens privacy (n=381)	8.1%	30.4%	23.4%	31.2%	3.1%	3.7%
G. Tourists and local residents get along well with each other (n=384)	7.3%	53.1%	27.1%	7.8%	0.5%	4.2%
H. Tourism facilities will restrict my access to area lakes, forests and open spaces (n=382)	7.1%	16.5%	21.2%	41.6%	4.7%	8.9%

15. Please indicate how much you agree or disagree with the following statements about the potential impacts of tourism on Piscataquis County.

<i>Increased tourism in Piscataquis County will:</i>	strongly agree	agree	neutral	disagree	strongly disagree	don't know
A. Preserve local culture and heritage (n=380)	10.8%	44.2%	20.5%	16.1%	1.3%	7.1%
B. Preserve land and natural resources (n=374)	9.4%	31.8%	20.6%	25.7%	4.3%	8.3%
C. Increase sales to local businesses (n=384)	24.7%	65.6%	4.4%	2.1%	0.3%	2.9%
D. Improve the overall quality of life of residents (n=374)	9.6%	32.4%	27.8%	18.7%	3.5%	8.0%
E. Increase in-migration by new residents (n=381)	8.7%	52.5%	20.5%	6.3%	1.0%	11.0%
F. Result in over development of land (n=372)	9.1%	29.8%	24.5%	24.2%	2.4%	9.9%
G. Improve job opportunities (n=385)	10.1%	46.2%	16.9%	18.2%	3.6%	4.9%
H. Improve local municipal services (n=383)	5.7%	30.8%	28.7%	19.8%	2.6%	12.3%

16. Please indicate your support for the following tourism based economic development strategies.

	strongly support	support	neutral	oppose	strongly oppose	don't know
A. Provide assistance to local residents and businesses that sell goods and services to tourists (n=378)	16.4%	43.4%	21.4%	11.9%	3.7%	3.2%
B. Recruit outside investors who have experience promoting tourism (n=377)	7.2%	34.5%	23.1%	22.3%	7.4%	5.6%
C. Attract outside investors to build a large resort and/or corporate conference center (n=380)	8.4%	19.2%	19.5%	28.4%	15.3%	9.2%
D. Offer adult education courses on hotel and restaurant management (n=375)	8.8%	42.6%	27.5%	10.9%	3.7%	6.4%
E. Plan more public events to attract tourists to the area (n=381)	17.3%	52.5%	16.5%	8.1%	2.4%	3.1%
F. Develop a county-wide tourism management plan (n=373)	18.8%	47.5%	13.9%	9.9%	4.0%	5.9%
G. Attract seasonal residents who purchase second homes in the area (n=380)	10.8%	38.7%	20.0%	16.6%	9.5%	4.5%

17. Which of the strategies above (A – G) is most important for Piscataquis County? (n=306)

A = 24.4%      B = 4.2%      C = 10.1%      D = 4.2%      E = 21.9%      F = 24.2%      G = 11.1%

*Attracting more tourists to the area could require changes in the way land is used. Some land could be developed to offer more recreation opportunities and some could be protected to preserve natural and historic areas.*

18. Please indicate your support for each land-use strategy.	strongly support	support	neutral	oppose	strongly oppose	don't know
A. Manage residential and commercial development on land near to....						
<i>Snowmobile trails (n=368)</i>	13.9%	39.1%	21.5%	12.8%	5.4%	7.3%
<i>Lakes and waterways (n=369)</i>	20.6%	47.2%	11.7%	9.5%	4.6%	6.5%
<i>Historic sites (n=363)</i>	18.7%	50.1%	17.4%	5.0%	2.8%	6.1%
<i>Hiking trails (n=361)</i>	15.0%	50.1%	18.3%	6.6%	2.8%	7.2%
B. Protect land for public recreation use through....						
<i>Local zoning (n=372)</i>	15.6%	42.2%	16.4%	8.9%	7.3%	9.7%
<i>Outright purchases (n=360)</i>	11.3%	29.7%	23.9%	14.2%	9.4%	11.4%
<i>Conservation easements (n=362)</i>	12.2%	34.3%	23.5%	8.8%	7.5%	13.8%
C. Support trail systems that are....						
<i>Exclusively for motorized use (n=357)</i>	11.2%	28.0%	22.7%	20.2%	11.2%	6.7%
<i>Exclusively for non-motorized use (n=355)</i>	20.3%	36.3%	19.4%	13.2%	3.7%	7.0%
<i>Mixed non-motorized and motorized use (n=366)</i>	10.9%	33.3%	23.0%	14.8%	9.3%	8.7%
D. Protect cultural-heritage resources through....						
<i>Historic zoning (n=360)</i>	14.2%	45.6%	21.9%	7.8%	3.9%	6.7%
<i>Restoration of historic buildings (n=367)</i>	22.3%	52.0%	15.0%	4.9%	1.4%	4.4%
<i>Standards for new buildings (n=364)</i>	13.2%	41.8%	24.7%	8.2%	5.5%	6.6%

19. Would you prefer tourism in Piscataquis County to be concentrated to a few towns and sites or spread out to many towns and sites? (n=390)

13.8% Concentrated to a few towns and sites      73.3% Spread out to many towns and sites      12.8% Don't know

20. Among the towns in Piscataquis County, would you like the town in which you live to become a primary tourist destination, a minor tourist destination, or not a tourist destination? (n=384)

38.8% Become a primary tourist destination      46.6% Become a minor tourist destination      14.6% Not a tourist destination

21. Overall, how important should tourism be to the future of Piscataquis County? (n=387)

37.7% Very Important      36.2% Important      21.2% Somewhat Important      4.9% Not Important

22. Are there any aspects of Piscataquis County (places, events, etc.) that you would not want to promote as tourist attractions?

*Finally, we would like to ask a few questions about yourself.*

23. What is your sex? (*n*=392) 39.8% male 60.2% female
24. In what year were you born: (*n*=388) Mean=1948.1 Median=1947.0
25. How many people currently live in your household? (*n*=389) Mean=2.6 people Median=2.0 people
26. How many of those people are under the age of 18? (*n*=379) Mean=0.49 people Median=0.0 people
27. Which of the following best describes your level of education so far? (*n*=387)
- |                                   |  |
|-----------------------------------|--|
| 7.0% some high school, no diploma | 14.0% 2-year college/vocational graduate           |
| 31.3% high school graduate/GED    | 13.4% 4-year college graduate                      |
| 23.8% some college, no degree     | 10.6% post-college graduate or professional degree |
28. Which of the following best describes your current work status? (*n*=363)
- |                         |  |
|-------------------------|--|
| 37.5% work full-time    | 5.2% take care of home or family full-time |
| 6.3% work part-time     | 0.6% student                               |
| 0.8% work seasonal jobs | 36.1% retired                              |
| 9.4% self-employed      | 4.1% out of work                           |
29. Do you work in Piscataquis County or do you work outside the county? (*n*=375)
- |                                  |                               |                  |
|----------------------------------|-------------------------------|------------------|
| 79.3% work in Piscataquis County | 12.3% work outside the county | 40.8% don't work |
|----------------------------------|-------------------------------|------------------|
30. Do you own a business in Piscataquis County? (*n*=387)
- |           |          |
|-----------|----------|
| 15.0% yes | 85.0% no |
|-----------|----------|
31. About how much land do you own in Piscataquis County? (*n*=385)
- |            |                        |                  |                  |                        |
|------------|------------------------|------------------|------------------|------------------------|
| 11.9% none | 30.9% less than 1 acre | 34.8% 1-10 acres | 7.0% 11-20 acres | 15.3% 21 acres or more |
|------------|------------------------|------------------|------------------|------------------------|
32. Do you own a camp in addition to your primary residence? (*n*=387)
- |           |          |
|-----------|----------|
| 27.4% yes | 72.6% no |
|-----------|----------|
33. During the past 12 months, in which of the following civic activities have you participated? (*n*=346)
- |  |                                 |
|--|---------------------------------|
| 21.4% member of a local civic/fraternal organization | 10.1% serve on a town committee |
| 16.5% member of a sporting/recreation club           | 5.2% member of a church group   |
| 5.2% member of an environmental club                 | 77.7% voting                    |
| 11.8% other  |                                 |
34. During the past 12 months, what was the combined income for the members of your household? (*n*=350)
- |                           |                           |                           |                          |
|---------------------------|---------------------------|---------------------------|--------------------------|
| 8.6% Less than \$10,000   | 17.7% \$15,000 - \$24,999 | 18.9% \$35,000 - \$49,999 | 6.3% \$75,000 - \$99,999 |
| 11.4% \$10,000 - \$14,999 | 11.1% \$25,000 - \$34,999 | 19.1% \$50,000 - \$74,999 | 6.9% \$100,000 or more   |

## **APPENDIX 4**

### **BUSINESS SURVEY OVERALL RESPONSES**

# Piscataquis County Business Survey

## *Aggregate Survey Responses*

This survey is being conducted by the Margaret Chase Smith Center for Public Policy and the Department of Resource Economics and Policy at The University of Maine. It is being conducted in partnership with town managers and community and economic developers in Piscataquis County.

The survey is designed to find out how the business community feels about tourism development in Piscataquis County. The information from this survey will be used to help identify what residents want for the future and to suggest plans and solutions to bring about sustainable economic growth for the area.

Completing the questionnaire should take about 20 minutes of your time. Your participation in this survey is voluntary and you do not have to answer any questions you don't want to. Do not put your name or other identifying marks on the questionnaire. The number stamped on the questionnaire allows us to know that you returned the questionnaire. Your name will not be connected to your answers.

This survey has been sent to most businesses in Piscataquis County. It is important that your opinions are included. After you have completed the questionnaire, please mail it to us in the postage-paid envelope provided.

Thank you for your help.

### *First, we'd like to ask you some general questions about your business (organization).*

#### **1. How many years has your business operated in Piscataquis County? (n=199)**

*Mean = 26.0 years; Median = 20.0 years*

9.5% 1-2 yrs      13.1% 3-5 yrs      12.6% 6-10 yrs      22.1% 11-20 yrs      16.1% 21-30 yrs      26.6% 31 yrs & more

#### **2. Which of the following best describes the *ownership structure* of your business: (n=207)**

44.9% Proprietorship or partnership (any form)      7.7% Non-profit organization      5.8% Other  
40.1% Privately-owned corporation      1.4% Publicly-owned corporation

#### **3. Is your business a single establishment firm or part of a multi-establishment firm? (n=208)**

82.7% Single-establishment firm      16.3% Multi-establishment firm

#### **4. Including yourself, about how many people in total did your business employ in 2003 and in 1998?**

	Mean	Median	1-2 emp	3-5 emp	6-10 emp	11-20 emp	21-50 emp	50 or more
1998 employees (n=175)	19.8 emp	4.0 emp	26.2%	28.9%	22.8%	9.4%	5.4%	7.4%
2003 employees (n=205)	22.64 emp	4.0 emp	26.2%	26.8%	22.1%	10.1%	6.0%	8.7%

#### **5. During 2003, about how many of your employees were:**

	Mean	Median	0 emp	1-2 emp	3-5 emp	6-10 emp	11-20 emp	21-50 emp	50 or more
Yr-rnd ft (n=159)	21.5 emp	3.0 emp	7.5%	36.5%	28.9%	13.2%	4.4%	2.5%	6.9%
Yr-rnd pt (n=123)	7.2 emp	2.0 emp	17.9%	39.8%	24.4%	8.1%	2.4%	4.9%	2.4%
Seasonal (n=92)	4.0 emp	1.0 emp	35.9%	29.3%	17.4%	12.0%	2.2%	2.2%	1.1%

**6. Does your business experience substantial seasonal fluctuations in sales? (n=203)**

64.5% Yes

35.5% No

**7. In which of the following ways does your business respond to seasonal fluctuations? (n=192)**

71.4% Do not experience seasonal fluctuations

16.7% Hire and fire/layoff employees

38.5% Increase and decrease employee hours

14.6% Close during the off-season

20.8% Other

*Local communities have considered many strategies, including tourism, for increasing business opportunities in Piscataquis County.*

**8. Please indicate your support for each strategy.**

	strongly support	support	neutral	oppose	strongly oppose	don't know
A. Assist local residents to improve their job skills (n=197)	40.1%	32.5%	18.8%	3.0%	0.0%	5.6%
B. Assist local residents to develop and operate small businesses (n=198)	31.3%	43.4%	17.7%	2.0%	0.5%	5.1%
C. Strengthen technology and telecommunications countywide (n=192)	35.4%	37.0%	21.4%	1.0%	0.0%	5.2%
D. Offer financial incentives to attract and retain businesses (n=195)	43.6%	28.2%	15.9%	5.6%	1.5%	5.1%
E. Expand national marketing to attract new businesses (n=198)	34.3%	31.3%	22.7%	6.1%	1.5%	4.0%
F. Expand tourism promotion (n=199)	45.2%	28.6%	17.6%	2.0%	2.5%	4.0%

**9. Which of the strategies above (A – F) is most important for your business? (n=178)**

A = 20.2%

B = 10.7%

C = 7.3%

D = 16.3%

E = 6.7%

F = 38.8%

**10. How important is tourism to the success of your business? (n=207)**

30.9% Very Important

18.4% Important

22.2% Somewhat Important

28.5% Not Important

**11. About what percent of your gross sales revenues in 2003 is related to tourism? (n=185)**

Mean=30.4%sales; Median=20.0% sales

22.2%

24.9%

18.4%

13.5%

10.8%

10.3%

0% sales

1-10% sales

11-30% sales

31-50% sales

51-90% sales

91-100% sales

**12. How important is tourism to the overall business environment in Piscataquis County? (n=205)**

55.1% Very Important

31.2% Important

11.7% Somewhat Important

1.9% Not Important

**13. Please indicate your support for the following strategies to attract more visitors to Piscataquis County.**

	strongly support	support	neutral	oppose	strongly oppose	don't know
A. Increase promotion of outdoor recreation opportunities (n=201)	51.2%	33.8%	10.0%	2.0%	1.5%	1.5%
B. Increase signs and maps to direct tourists to recreation sites (n=198)	37.4%	45.5%	13.1%	1.0%	1.5%	1.5%
C. Implement user fees to support grooming of snowmobile trails (n=195)	18.5%	32.3%	26.2%	14.4%	5.1%	3.6%
D. Build parking areas and provide restrooms at recreation sites (n=200)	21.5%	40.0%	28.0%	3.0%	3.0%	4.5%
E. Secure public access to boat launches on local waterways (n=200)	27.5%	43.5%	20.0%	2.0%	2.5%	4.5%

**14. Which of the strategies above (A – E) is most important for Piscataquis County? (n=159)**

**A = 63.5%**

**B = 20.1%**

**C = 9.4%**

**D = 2.5%**

**E = 4.4%**

**15. How would you like the current level of each recreation activity to change in coming years?**

	increase	stay the same	decrease	don't know
A. Cross-country skiing (n=200)	77.0%	20.0%	0.0%	3.0%
B. Camping and hiking (n=200)	82.0%	16.0%	0.0%	2.0%
C. Snowmobiling (n=201)	49.0%	38.5%	9.5%	3.0%
D. Kayaking and canoeing (n=199)	77.9%	19.1%	0.0%	3.0%
E. Motor boating (n=200)	39.0%	48.0%	10.0%	3.0%
F. Snowshoeing and dog sledding (n=200)	69.0%	26.5%	1.0%	3.5%
H. ATV riding (n=201)	26.9%	30.8%	36.8%	5.5%

**16. Please indicate your support for the following strategies to attract more visitors to Piscataquis County.**

	strongly support	support	neutral	oppose	strongly oppose	don't know
A. Promote the area's history and culture to attract more tourists (n=202)	33.2%	44.1%	17.3%	2.5%	0.5%	2.5%
B. Open a regional cultural center such as a theater or museum (n=201)	25.4%	28.9%	30.8%	7.5%	4.0%	3.5%
C. Provide financial help to artists and crafters who want to start a business (n=200)	19.5%	27.5%	32.0%	11.0%	7.0%	3.0%
D. Increase public awareness of the area's history, arts, and traditional crafts (n=201)	30.3%	45.8%	17.9%	1.5%	1.5%	3.0%

**17. Which of the strategies above (A – D) is most important for Piscataquis County? (n=205)**

**A = 40.4%**

**B = 18.0%**

**C = 19.3%**

**D = 22.4%**



**18. How would you like the current level of local events to change in coming years?**

	increase	stay the same	decrease	don't know
A. Live musical performances (n=199)	72.4%	16.6%	2.0%	9.0%
B. Live theatre performances (n=196)	62.8%	21.4%	1.5%	14.3%
C. Arts and crafts fairs (n=199)	54.8%	35.2%	4.0%	6.1%
D. Local festivals (n=199)	68.3%	23.6%	2.0%	6.0%
E. Local sporting events (n=199)	59.8%	31.2%	1.5%	7.5%
F. Open houses at art and craft studios (n=198)	54.0%	32.3%	2.0%	11.6%

*Now, we'd like to ask your opinion about the effects of tourism. There are no right or wrong answers.*

**19. Please indicate how much you agree or disagree with the following statements about the impacts of tourism on the local economy.**

	strongly agree	agree	neutral	disagree	strongly disagree	don't know
A. Most of the businesses involved in tourism are small (n=203)	22.7%	48.3%	4.9%	18.7%	2.5%	3.0%
B. Tourism only helps businesses that sell directly to tourists (n=203)	2.5%	10.3%	10.3%	50.2%	25.1%	1.5%
C. Tourism does not provide the kinds of jobs our area needs (n=203)	9.9%	19.2%	11.8%	39.4%	18.2%	1.5%
D. Tourism provides mostly low-paying, seasonal jobs (n=202)	9.4%	39.1%	15.8%	24.3%	7.9%	3.5%
E. Tourism contributes to local tax revenues, thus lowering local tax bills (n=201)	12.9%	37.8%	10.9%	20.0%	10.0%	8.5%
F. Tourism increases the local cost of living (n=202)	7.4%	25.2%	16.3%	33.7%	9.4%	7.9%

**20. Please indicate how much you agree or disagree with the following statements about the impacts of tourism on local communities.**

	strongly agree	agree	neutral	disagree	strongly disagree	don't know
A. Tourism provides services/activities we wouldn't otherwise have (n=198)	14.1%	50.5%	16.1%	14.6%	1.5%	3.0%
B. Environmental impacts from tourism are relatively minor (n=199)	6.3%	39.2%	18.6%	27.6%	4.5%	4.0%
C. Tourist attractions/facilities improve a community's appearance (n=199)	16.6%	52.8%	23.6%	3.0%	2.5%	1.5%
D. Tourism reduces the quality of outdoor recreation opportunities due to overuse and crowding (n=197)	4.1%	17.3%	30.5%	39.1%	7.1%	2.0%
E. Tourism increases crime (n=198)	2.0%	15.7%	23.7%	46.5%	7.6%	4.5%
F. Tourism makes the area more crowded and threatens privacy (n=199)	4.5%	27.6%	25.1%	34.2%	7.5%	1.0%
G. Tourists and local residents get along well with each other (n=199)	5.0%	51.3%	30.2%	7.0%	3.5%	3.0%
H. Tourism facilities will restrict my access to area lakes, forests and open spaces (n=200)	4.5%	16.0%	21.0%	44.0%	10.0%	4.5%

21. Please indicate how much you agree or disagree with the following statements about the potential impacts of tourism on Piscataquis County.

<i>Increased tourism in Piscataquis County will:</i>	strongly agree	agree	neutral	disagree	strongly disagree	don't know
A. Preserve local culture and heritage (n=198)	12.6%	45.5%	27.8%	9.6%	2.0%	2.5%
B. Preserve land and natural resources (n=197)	8.1%	34.5%	29.4%	20.3%	3.0%	4.6%
C. Increase sales to local businesses (n=199)	28.1%	63.8%	6.0%	1.0%	0.0%	1.0%
D. Improve the overall quality of life of residents (n=197)	14.7%	38.1%	27.4%	12.2%	3.6%	4.1%
E. Increase in-migration by new residents (n=197)	13.2%	60.9%	12.7%	5.6%	0.5%	7.1%
F. Result in over development of land (n=197)	11.2%	23.4%	26.4%	28.9%	4.6%	5.6%
G. Improve job opportunities (n=199)	11.6%	59.3%	17.1%	8.0%	2.0%	2.0%
H. Improve local municipal services (n=197)	7.6%	33.0%	29.9%	18.8%	2.0%	8.6%

22. Please indicate your support for the following tourism based economic development strategies.

	strongly support	support	neutral	oppose	strongly oppose	don't know
A. Provide assistance to local residents and businesses that sell goods and services to tourists (n=198)	22.2%	38.4%	22.7%	13.1%	2.0%	1.5%
B. Recruit outside investors who have experience promoting tourism (n=199)	14.1%	28.6%	26.6%	21.6%	4.0%	5.0%
C. Attract outside investors to build a large resort and/or corporate conference center (n=199)	12.6%	24.1%	23.6%	23.1%	13.6%	3.0%
D. Offer adult education courses on hotel and restaurant management (n=198)	11.1%	46.0%	27.3%	11.6%	1.5%	2.5%
E. Plan more public events to attract tourists to the area (n=200)	25.5%	51.5%	16.0%	5.0%	1.0%	1.0%
F. Develop a county-wide tourism management plan (n=197)	27.9%	46.7%	14.2%	6.6%	2.5%	2.0%
G. Attract seasonal residents who purchase second homes in the area (n=199)	13.6%	35.7%	29.1%	12.1%	7.0%	2.5%

23. Which of the strategies above (A – G) is most important for Piscataquis County? (n=155)

A = 25.2%      B = 5.8%      C = 12.9%      D = 6.5%      E = 17.4%      F = 18.7%      G = 13.5%

*Attracting more tourists to the area could require changes in how land is used. Some land could be developed to offer more recreation opportunities and some could be protected to preserve natural and historic areas.*

24. Please indicate your support for each land-use strategy.

	strongly support	support	neutral	oppose	strongly oppose	don't know
A. Manage residential and commercial development on land near to....						
Snowmobile trails (n=194)	17.0%	35.6%	27.3%	8.2%	7.2%	4.6%
Lakes and waterways (n=197)	22.3%	41.6%	20.3%	6.1%	5.6%	4.1%
Historic sites (n=196)	19.9%	42.3%	23.0%	5.1%	5.6%	4.1%
Hiking trails (n=195)	18.5%	40.5%	26.2%	5.6%	5.6%	3.6%
B. Protect land for public recreation use through....						
Local zoning (n=195)	17.4%	34.4%	21.5%	15.4%	7.2%	4.1%
Outright purchases (n=196)	12.8%	28.6%	27.0%	16.3%	10.2%	5.1%
Conservation easements (n=194)	17.5%	29.9%	28.4%	11.3%	5.7%	7.2%
C. Support trail systems that are....						
Exclusively for motorized use (n=189)	16.4%	30.2%	23.8%	18.0%	7.9%	3.7%
Exclusively for non-motorized use (n=190)	23.7%	31.6%	23.7%	13.1%	5.3%	2.6%
Mixed non-motorized and motorized use (n=194)	17.5%	35.1%	25.3%	13.9%	5.7%	2.6%
D. Protect cultural-heritage resources through....						
Historic zoning (n=194)	13.4%	39.2%	26.3%	7.2%	8.2%	5.7%
Restoration of historic buildings (n=198)	23.2%	47.5%	19.7%	2.5%	4.0%	3.0%
Standards for new buildings (n=194)	17.5%	36.6%	29.9%	5.2%	5.7%	5.2%

25. Would you prefer tourism in Piscataquis County to be concentrated to a few towns and sites or spread out to many towns and sites? (n=200)

21.5% Concentrated to a few towns and sites      67.0% Spread out to many towns and sites      11.5% Don't know

26. Among towns in Piscataquis County, would you like the town where your business is located to become a primary tourist destination, a minor tourist destination, or not a tourist destination? (n=197)

48.7% Become a primary tourist destination      39.6% Become a minor tourist destination      11.7% Not a tourist destination

27. Are there any aspects of Piscataquis County (places, events, etc.) that you would not want to promote as tourist attractions?

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