ECONOMIC PROFILE OF THE MAINE GUIDING INDUSTRY

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EXECUTIVE SUMMARY

This project was conceived as a means of addressing the knowledge gap about Maine's 'human-powered' recreation sector as a component of the state's economy. To that end, this report includes information on human-powered recreation nationally and in Maine, with a specific emphasis on the Maine Registered Guides Industry as a piece of the sector. The report presents an economic profile of the Maine Registered Guides Industry along with trends that emerge regarding the role of human-powered recreation in Maine. The analysis of the Maine Registered Guides Industry is based on primary data collected through a survey of establishments affiliated with the Maine guiding industry. The survey was conducted during the winter/spring and fall/summer seasons of 2007. Key results of the study are summarized below:

- In 2007, Maine's guiding industry directly generated an estimated $39.1 million in revenue, and included 4,740 Maine Guides.

- Sixty-five percent of establishments in Maine's guiding industry report revenue of less than $10,000 per year.

- The average guide leads twenty-five full–day trip equivalents per year, serving a median of two clients per trip.

- Fifty-percent of reported trips focused solely on a human-powered outdoor recreation activity.
    - → Of the Guiding establishments incorporated after the year 2000, 36% indicate that all of their trips are dedicated to non-motorized recreation.

- Youth camps offer approximately 1,454 full-day equivalent outdoor recreation trips per year and spend on average $5,000 for guiding services associated with these trips.

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1. INTRODUCTION

Outdoor recreation is an important component of Maine's identity, providing recreational opportunities for residents and attracting visiting outdoor enthusiasts alike. Recent Maine-based recreation studies have focused their investigations on the economic impact of motorized outdoor recreation activities, such as all terrain vehicles (ATV's) and snowmobiles (Morris et. al 2005; Reiling 1998); providing policymakers with information on the size, scope and impact of this industry. The current study adds to this collective knowledge by investigating aspects of non-motorized recreation, herein referred to as 'human-powered' recreation. This report presents information on the human-powered recreation industry, including previous work to capture the economic impact of this industry in the United States and in Maine, as a means of providing context for the current study. This report also presents an economic profile of the Maine Registered Guides "industry" as one component of Maine's human-powered recreation industry. The analysis is based on primary data collected through a survey of Registered Maine Guides conducted during January and July of 2007. The Wilderness Society, in partnership with the Maine Wilderness Guides Organization, commissioned the survey with support from the Jessie B. Cox Charitable Trust. The survey collected baseline economic information on the operations of Registered Maine Guides, including frequency and location of trips, clientele served and the types of activities currently being offered by Guides. This information allowed for an economic analysis of the Guiding industry.

2. HUMAN-POWERED RECREATION

Human-powered recreation is a growing industry in the United States. In 2004, 72 percent (141 million people[1]) of Americans participated in a human-powered recreation activity, an increase of six percent or 15 million people since 1998 (Outdoor Recreation 2005). Of particular interest, the outdoor recreation/adventure travel segment of the industry might exhibit growth potential, as 59.5 million U.S. residents (only 25 percent of the population) took a vacation where the primary purpose was to experience an outdoor adventure/recreation. If a larger portion of Americans, particularly those involved in human-powered activities, could be tapped as outdoor recreation tourists, it could lead to extensive growth in this industry.

Maine is in a unique position to respond to the potential demand for outdoor recreation/adventure travel given that 20 percent of Maine's visitors indicate that "enjoying the outdoors" was the most important reason for their visit, in comparison to 13 percent nationwide (Longwoods International 2004). Additionally, a number of the human-powered recreation activities that are projected to experience growth are those in which Maine has already established a strong presence. Activities such as canoeing, kayaking, biking, horseback riding and wildlife watching are expected to experience growth in participation, while participation in backpacking, cross-country skiing, fishing, hiking and hunting are projected to increase more slowly (Irland Group 2001; Outdoor Recreation 2005). To examine the state of Maine's potential to fulfill this increasing demand for outdoor activities, and garner perceptions on the popularity of outdoor

[1] Data is based on information collected by the Outdoor Recreation Foundation on 22 activities tracked by their annual nationwide survey.

recreation activities, this project included a survey effort that obtained information on the activities currently undertaken by Registered Maine Guides and their opinions about trends in recreation.

In addition to attracting tourists, human-powered recreation is enjoyed by Maine's own citizens. The seven most popular outdoor recreation activities indicated by respondents of a survey of Piscataquis County residents were all human-powered (Reilly and Morris 2004). The same residents felt more favorably towards efforts to promote outdoor recreation to draw visitors, if these efforts were focused on human-powered recreation: for example, 57 percent of respondents would support trail systems that were exclusively non-motorized (Reilly and Morris 2004). Visitation trends at Maine state parks, where 59 percent of the total 2.1 million visitors in 2005 were from the state, also suggest that Mainers enjoy human-powered outdoor recreation opportunities. When asked what attracted them to state parks, visitors assigned higher than average levels of importance to 5 of 14 recreational attributes: swimming areas, hiking trails, nature trails, picnic areas and sunbathing areas (Morris et. al. 2006).

Recent work by the Maine Office of Tourism and Longwoods International suggests that the economic impact of tourism to Maine is $13.9 billion per year. Of particular interest, this work estimates that 20 percent of Maine's visitors come to the state for an outdoor experience (Longwoods International 2004). Research by David Vail (2003), a professor at Bowdoin College, suggests that nature-based tourism is Maine's 'niche' in the tourism industry.

It is evident that visitors and Mainers alike value the opportunity to participate in outdoor recreation activities. Additionally, recent studies have suggested that the economic impact of human-powered recreationalists may be greater than currently perceived. Omohundro (2002) investigates what he refers to as the “granola myth” in a study about hikers in the Adirondack Park of New York. This myth indicates that human-powered recreationalists bring their own supplies and gear to a recreation area, thereby contributing little financially to the local economy. The concern surrounding this myth is that failure to invest in human-powered recreation facilities (e.g. hiking trails, canoe access points) may mean that states squander an opportunity to attract additional recreationalists. Omuhundro found that a ‘typical’ human-powered recreationalist was a multi-day, multi-purpose visitor who may spend less money per trip, but returned more frequently to an area. This is consistent with findings from Maine’s state park study, where 46 percent of visitors indicated they had visited Maine state parks four or more times in prior years; 96 percent had visited the parks at least once before (Morris 2006). Additionally, the Adirondack study found that hikers spent between $25 -$42 dollars per person per day, or $71-$111 per person over the length of the trip on restaurant meals, shopping, lodging and other local services. Combined, this study found that hikers spent $1.26 million - $1.96 million during the summer season in the six study sites (Omohundro 2002).

The above work is also consistent with an investigation of visitor spending habits in Rangely, Maine (Irland Group 2002). This study also indicated that hikers spent an average of $42 a day. Other estimated daily expenditures for outdoor recreationalists include cross-country skiers ($38/day), anglers ($112-$130/day), and hunters ($81/day). If we combine these daily estimates, with average annual visitations, a picture of the economic implications that human-powered recreation has on Maine emerges. It is estimated that 16 percent, or 5.6 million of Maine's annual visitors participate in hiking[2]. Applying the average spending of $42/day to these figures, we can estimate that visitors who participate in hiking spend $235 million dollars in Maine annually. In comparison, studies by Reiling (1998) and Morris et al. (2005) indicate that the economic impact of the snowmobiling industry in Maine is $176.3 million and the economic impact of ATV-related activities in Maine is $200 million.

Another study, which focuses on a non-motorized activity, sought to quantify the spending habits and the economic impact of canoe paddlers along the Northern Forest Canoe Trail. The author, Noah Pollock, found that the average paddler spent $343 dollars per trip or $39 per person per day with a total economic impact on local economies of $8.8 million. Local paddlers spent on average $5 per person per day, while non-locals spent $46 per person per day (Pollack 2007). Pollack compared his findings to a 2003 survey of Vermont Visitors in an effort to further investigate the 'granola myth'. The Vermont-wide study found that the average per visitor expenditure was $192, in comparison to $185 for paddlers. The author explains this relationship by commenting that the typically longer trip length of the paddlers compensated for the lower daily expenditures. His findings indicate that trip length, the size of the paddler group and the use of outfitters, along with other variables, were the primary drivers of the economic impacts associated with paddler expenditure. The study found that on average 12% of paddlers used guides during their trips at an average cost of $56.70 per group per trip across all regions of the Northern Forest Canoe Trail. Of interest, the highest guide use was in the Allagash area of Maine, where 38% of paddlers utilized guides at an average price of $266.69. Pollack indicated that Maine guides hold a particularly high reputation,

[2] Longwoods estimates that 35 million day trips are made to Maine annually.

in part, because of the Registered Maine Guide licensing process. His findings also indicated that those paddlers who did employ the services of a guide and who stayed in hotels or rented cabins had the highest expenditures amongst the paddlers. These types of paddlers were few in number but accounted for a significant portion of the economic impact found in the study. The next section seeks to further investigate the contribution that guides may have in the human-powered recreation economy.

3. MAINE GUIDES AS A COMPONENT OF HUMAN-POWERED RECREATION

One component of the nature-based, or outdoor recreation, tourism industry that often caters to individuals who seek human-powered recreation experiences includes people who work as Registered Maine Guides. A 1992 study found that, at that time, 4,452 Maine people had full-time jobs that catered solely to anglers, hunters, and wildlife watchers (Roper et. al.1992). The current study seeks to obtain additional information regarding the Guiding industry, with a particular focus on trips centered on human-powered activities. It should be stated that this does not presume to capture the full extent of the economic impact of the Guiding Industry as a whole. However, work to assess components of the human-powered recreation industry, with a particular focus on recreational experiences led by Maine Guides, is consistent with Maine's recent research focus on nature-based industries. This report presents results on the economic contribution of the Maine Guide industry, based on a yearlong survey initiative undertaken by the University of Maine's School of Economics. The economic contribution analysis strives to measure the impact of the Maine Guiding 'industry' (i.e., professional guides), and is not intended to comment on the impact of all guiding activities that occur in Maine.

3.1 Methodology

The office of Inland Fish and Wildlife for the State of Maine currently records 6,000 registered Maine Guides[3]. In an effort to obtain additional information on the activities undertaken by Guides, a survey was administered via the on-line survey tool Vovici© to 700 Guides belonging to six different guiding organizations between January 2007 and July 2007 (Table 2). To minimize recall bias, the survey was administered in two rounds. The first survey, which ran from January 3, 2007 to March 3, 2007, asked Guides to discuss their activities during the summer and fall months (Appendix A). Of the 700 Guides who were invited to participate, 188 responded, with 93 undeliverable surveys due to bad email addresses, resulting in a 31 percent response rate. The second round ran from May 30, 2007 to July 4, 2007 and asked Guides to discuss their activities during the winter and spring months (Appendix B). Of the 700 Guides who were invited to participate, 133 responded, with 107 undeliverable surveys due to bad email addresses, resulting in a 22 percent response rate. The lower response rate during the winter/spring survey may be due to the fact that many Guides indicated the summer and fall are typically the busiest season, and thus some guides may provide limited services in the winter and spring, per Table 1.

Table 1. Responses to: When is your busiest season?

Spring	9.1 %
Summer	46.8 %
Fall	41.1 %
Winter	3.0 %

[3] Number of guides confirmed on August 18, 2008.

While this study cannot be considered completely inclusive of all components of the Maine Guiding industry, an effort was made to contact Guides throughout the state from various sectors of the industry. To that end, the survey was sent to members of six different guiding organizations (Table 2).

Table 2. Survey Respondents, by Professional Association

Respondents by Professional Association	Maine Professional Guides Association	Maine Sporting Camps Association	Maine Wilderness Guides Organization	North Maine Woods	Raft Maine	Maine Outdoors	Total
Summer/Fall Participants	117	7	27	2	2	0	163
Winter/Spring Participants	81	5	15	1	2	0	133
Total Invited	537	62	77	10	9	5	700

Section 3.2 presents findings from the survey. Section 3.3 presents an economic profile of Maine's Registered Guiding industry based on the primary data collected through the survey initiative. We use the direct economic impacts of Registered Maine Guides, from the survey data, to examine the statewide multiplier (i.e., indirect and induced) effects associated with the industry. The multiplier effects, estimated using the IMPLAN input-output model, account for the additional economic activity supported by the spending of businesses (indirect effects) and workers (induced effects) involved with the guiding industry. The IMPLAN model tracks the flows of expenditures that occur among businesses in Maine, the purchases made by Maine workers, and the payments made to buy goods and services imported from out of state.

In connection with the Maine Registered Guides survey effort, Ann Ingerson of the Wilderness Society conducted a survey of Maine Youth Camps and Colleges using a modified version of the questionnaire sent to professional guides in order to obtain information on the human-powered recreation outings sponsored by these establishments (Appendix C). The results of this second survey effort will be discussed in Section 4.

3.2 Results

A key objective of our analysis was to provide benchmark economic data on the current state of this industry that may be used in comparison to future initiatives aimed at measuring the impact of this industry. The sections below presents baseline data on aspects of the Maine Guiding Industry.

3.2.1 Business Characteristics

The survey instrument consisted of twenty questions (Appendices A and B). Questions focused on business characteristics, trip activities, and perceptions regarding trends in outdoor recreation activities and use of motorized vehicles during guiding trips.
Table 3 shows a profile of the 'typical' Maine Guiding Business, based on survey responses. Results indicate that 24 percent of total respondents identified themselves as full-time guides and 92 percent indicated they were registered Maine Guides.

Survey respondents indicated that approximately 73 percent of their clients were from out of state, information that suggests guides are part of the nature-based tourism industry. Many of the Guides are well established as the average respondent had been guiding for 17 years.[4] However, many guides indicated, in comments throughout the survey, that the Guiding market is currently flooded with newcomers. Survey results do reveal a preponderance of new guiding establishments in the market, as 61 percent of the businesses were established in 1995 or after, and 36 percent were established after 2000. Given these interesting findings, additional analysis will be performed comparing the newer guiding businesses to older businesses.

Table 3. Profile of Guiding Establishments, 2007

Business Characteristics	Guiding Respondent Average
Percent Registered Maine Guides	92%
Percent Full Time Guides	24%
Percentage of Customers from out-of-state	73%
Percent of Half-Day trips	22%
Percent of Full-Day trips	47%
Percent of Multi-Day trips	31%
Percent of Establishments reporting less than $10,000 in revenue	65%
Employment (avg. per establishment)	2
Average Years in Operation	17
Percent of Establishments created since 2000	36%

3.2.2 Revenue, Employment and Expenditure

To better understand the financial picture of responding guiding establishments, we asked participants to provide information on their revenue, employment and expenditures. Additionally, our analysis examined whether these financial components differed across season. Of particular interest was whether the amount of revenue reported for the fall/summer seasons exceeded revenues for the winter/spring season. In the winter/spring season, 79 percent of respondents indicated that they generated revenue of less than

[4] This average of 17 years does not include three outliers in the sample, which indicated their operations began prior to 1900.

10,000 dollars, whereas 56 percent of fall/summer respondents indicated similar revenue numbers.

The establishments participating in the guiding industry are small operations. For example, 88 percent of respondents indicated that they employed two or fewer full-time workers, while 41 percent indicated they had no paid employees. On average, respondents employed 1.5 full-time workers and 2.0 part-time workers. Consistent with the employment figures, 42 percent of respondents indicated that they had no payroll expenditures and 90 percent of respondents reported a payroll of $20,000 or less.

Establishments also provided information on their non-payroll expenditures, such as spending on food or supplies for trips. Participants reported spending a median of $5,000 on non-payroll expenditures per year.

3.2.3 Guided Trips

<u>Trip Length and Clients Served</u>

As noted above, most guides indicated that fall or summer are the busiest seasons for their businesses. This trend is also evident when examining the number of trips they choose to lead and the number of clients served per trip. Statistical analysis confirms that the number of half-day, full-day and multi-day trips and the clients served on these trips is statistically different across the two seasons, where guiding activity is greater during the fall and summer seasons. Additionally, 45 percent of guides indicated that they served zero clients during the winter and spring; which corresponds with earlier information regarding busy seasons.

Survey respondents provided information on half-day, full day and multi-day trips. Below, we report the total number of trips indicated on the survey, including medians for each trip type. Across all respondents, information was provided on 1,494 half-day trips with a median of two clients served per trip. By comparison, participants reported 3,117 full-day trips with a median of two clients served per trip. Finally, 2,052 multi-day trips were reported with a median group size of five people per trip.

The typical guide leads a median of five half-day trips, ten full-day trips and five multi-day trips per year. We may also consider that half-day trips and multi-day trips can be converted into a full-day trip equivalent. Using a weight that treats a half-day trip as ½ of a full-day trip, and counts multi-day trips as 2 ½ full-day trips, we estimate that the average guide leads approximately 25 full-day equivalent trips per year.

Of interest, those respondents who indicated a majority of their trips were focused on human-powered recreation (80% of their trips or more) were statistically more likely to lead multi-day trips than establishments who were less focused on human-powered recreation (less than 80% of trips).

Trip Activities

An additional point of interest for this study was the popularity and prevalence of human-powered vs. motorized activities, as led by Guides. On each of the two surveys, a list of seasonally appropriate activities[5] was provided to participating guides, where they were asked to indicate if the activity had been the primary focus of one of their trips. Table 4 reflects the lists of activities, in alphabetical order, presented to survey participants. In addition to providing information on trip activities, guides were also

[5] Activity types included in the surveys were selected in consultation with members of the Maine Wilderness Guides Organization.

asked to provide the average price per person for a one-day trip of this activity type and the trends in participation in different activities (i.e. was this type of trip increasing, decreasing or experiencing no change in popularity in the past five years).

Table 4. Trip Activities

Activity	Season
ATV	Summer/Fall
Backpack	Summer/Fall; Winter/Spring
Boating	Summer/Fall
Bike	Summer/Fall; Winter/Spring
Canoe	Summer/Fall; Winter/Spring
Cross Country Skiing	Winter/Spring
Dogsled	Winter/Spring
Downhill Skiing	Winter/Spring
Hike	Summer/Fall; Winter/Spring
Hunt	Summer/Fall; Winter/Spring
Ice Climbing	Winter/Spring
Ice Fishing	Winter/Spring
Inland Fishing (not including ice fishing)	Summer/Fall; Winter/Spring
Kayak	Summer/Fall; Winter/Spring
Marine Fishing	Summer/Fall; Winter/Spring
Nature Photography	Summer/Fall; Winter/Spring
Sailing	Summer/Fall
Snow shoeing	Winter/Spring
Snowmobiling	Winter/Spring
Whitewater Rafting	Summer/Fall
Wildlife Watching	Summer/Fall
Winter Camping	Winter/Spring
Winter Mountainering	Winter/Spring

Participants were also asked to indicate which of the activities listed in Table 4 was the primary focus of a trip. The activities, which were the focus of the greatest number of trips according to respondents, are listed in Table 5, in alphabetical order. The price, or guiding fee, reported in Table 5 is a calculated average of a one-day trip for this activity type, and the percent indicates the number of participants who indicated they had led a trip where this activity was the primary focus of the trip.

Table 5. Trip Activities: Price and Popularity

Activity	Average Price ($)	% of respondents who led trip with activity as the primary focus
Canoe	168	33
Hiking	132	15
Hunting	275	37
Inland Fishing	202	33
Nature Photography	163	15
Snow shoeing	170	15
Snowmobiling	128	17
Wildlife Watching	136	20
Average All Activities	*$165 (weighted)*	

Additionally, in the Winter/Spring version of the survey we asked respondents to list the three most popular trip activities that they lead across all seasons. The results of this poll are consistent with the information provided in other portions of the survey. The top activities listed were: canoeing, hunting, fishing, snowmobiling, and wildlife watching / nature photography.

Trip Activity Trends

An additional point of interest in the study was not only the type of activities currently led, but also the trends that guides have noted in the popularity of trip activities that they guide. To begin to understand the changing popularity of outdoor recreational activities, we asked guides to comment on the growth trends of each activity listed in Table 4; whether they perceived the activity as experiencing increasing, decreasing or no change in popularity. Analysis revealed four trip-activities that guides perceive as experiencing significant increases in popularity over the past five years (Table 6). It should be noted that some activities may have started at a low popularity level, such that even rapid increase in popularity may not catapult this activity into one of the most frequently led trips.

Table 6. Trip Activity Trends

Activity	Percent of Respondents indicating Activity has Increased in Popularity in the Past 5 years
ATV	59%
Kayak	69%
Nature Photography	54%
Wildlife Watching	60%

Location of Trips

To better understand the guiding activities taking place, respondents were asked to comment on the areas (by county) where they typically guide trips. Five counties stood out as the most prominent trip destinations, where the percentages given indicate the percent of respondents who indicate that this is a county where they typically guide trips: Aroostook (31%), Penobscot (28%), Piscataquis (27%), Somerset (25%) and Franklin (15%). With respect to the most popular activities identified in Table 5, analysis also identified the counties where guides reported most frequently engaging in these trip activities. These results are reported in Table 7.

Table 7. Trip Locations

Activity	Most Popular Counties to pursue activity:
Canoe	Aroostook, Piscataquis, Penobscot
Hiking	Piscataquis, Somerset, Penobscot
Hunting	Aroostook, Penobscot, Piscataquis
Inland Fishing	Aroostook, Hancock, Penobscot/Kennebec
Nature Photography	Piscataquis/Penobscot, Aroostook, Somerset
Snow shoeing	Piscataquis/Oxford, Franklin, Somerset
Snowmobiling	Somerset, Aroostook, Penobscot/Piscataquis
Wildlife Watching	Aroostook, Penobscot, Piscataquis

3.2.4 Use of Motorized Vehicles

As previously mentioned, an area of particular interest to this study was the use of motorized vehicles in guided trips. To capture the use of motorized vehicles, either as a primary activity or as a means of accessing human-powered activities, we asked participants a series of questions designed to capture the focus of trips. Question 17 of the survey asked participants to indicate, "What percent of your trips focused on *human-powered* recreation?" while question 18 of the survey asked, " What percent of trips focused on *motorized* recreation?" Respondents reported that 50 percent of their trips were focused primarily on human-powered recreation and 28 percent of their trips were focused on motorized activities. In discussion with members of the guiding community, it was also revealed that many trips use motorized means of transportation to access remote areas for human-powered recreation opportunities (for example snowmobiling to a remote area in order to access a winter climbing site). To capture this aspect, we asked participants to indicate what percent of their trips used motorized transportation to access human-powered recreation opportunities; guides indicated in their responses that 35 percent of their trips met this circumstance. Forty-four percent of guides indicated that *none* of their trips fell into this category, while 19 percent indicated that *almost all* (99 percent or more) of their trips used motorized transportation to access human-powered recreation opportunities. Table 8 provides further information about the number of guides who focus on human-powered recreation opportunities or motorized recreation trips.

Table 8. Primary Trip Focus, by motorization

	Percent of Respondents
All (100%) of trips are human-powered	35%
None (0%) of trips are human-powered	26%
All (100%) of trips are motorized	10%
None (0%) of trips are motorized	51%

3.2.5 Year of establishment

In order to ensure that this report provided information that would be pertinent to the guiding community, the project investigators met with members of the Maine Wilderness Guides Organization to discuss opportunities that this project may inform. An area of repeated interest was perceived 'flooding' of the guiding market by new enterprises. To perform analysis based on the year that a guiding business began operations, five categories based on establishment age were designated per Table 9.

Table 9. Respondents by year business was established

Year Established	*Percent of respondents*[a]
Pre-1975	9%
1976-1985	11%
1986-1995	22%
1996 to 1999	22%
2000-2007	36%

[a] Sixty- five respondents did not provide year business was established

An analysis was requested that compared enterprises, by year they began operations, with respect to the motorized/human-powered trends in guided activities. Of respondents who indicated that *all* (100%) of their trips were human-powered, 36 percent were businesses that began operations after 2000. Of those respondents who indicated that *all* (100%) of their trips were motorized, 23 percent were entities established prior to 1975 (Table 10).

Table 10. Percent of trips led that were human-powered or motorized, by year of establishment.

Year Established	*100% of trips are human-powered (response to q17)*	*100% of trips are motorized (response to q18)*
Pre-1975	9%	23%
1976-1985	11%	14%
1986-1995	22%	5%
1996 to 1999	22%	14%
2000-2007	36%	5%

An additional point of interest was the relationship between revenue and year of establishment. Of those establishments that began operations between 2000 and 2007, 82 percent reported revenues of $5,000 or less; and no establishments in this age cohort reported revenues of greater than $150,000. By comparison, of those establishments that began operations between 1986 and 1995, 71 percent reported revenues of $5,000 or less; and 6 percent reported revenues of greater than $150,000. As expected, establishments that were created prior to 1975 reported higher revenues than new establishments. In this category of respondents, only 26 percent reported revenues of $5,000 or less while 31 percent reported revenues of greater than $150,000.

3.3 Economic Contribution

To estimate the economic impact of the Maine Registered Guides industry, average expenditure and employment information collected from the survey can be applied to the total number of active guides in Maine. The Maine Inland Fish and Wildlife Service maintains records on all Registered Maine guides; currently the state's list contains 6,000 names. Based on our survey findings, eight percent of the Registered Maine Guide respondents do not actively lead guided trips (despite their membership in one of the Guiding organizations). Additionally, approximately 13 percent of the contact names / email addresses provided for the survey were unreliable. In total, 21 percent of the prospective guides we attempted to contact do not appear to be currently involved in the guiding industry. The Maine Department of Inland Fish and Wildlife concedes that, while they try to maintain an accurate database, there are some erroneous entries because of the evolving nature of the industry. Therefore, when discussing the statewide contribution of the guiding industry, we assume that approximately 21 percent of guides on the list are inactive or out-of-date; thus, only 4,740 guides will be considered for the remainder of this analysis.

Survey information indicates that a typical guide leads a median of 25 full-day trip equivalents per year with two clients per trip. We estimate that the industry served approximately 237,000 clients in the previous year at an average of $165 per trip. This data yields estimation that the consumers of Registered Maine Guides spent approximately $39,105,000 on guiding serves. When discussing the contribution of the Guiding Services to Maine's economy, the employment, and revenue tracked during the survey effort, creates additional economic activity in Maine's economy. These additional economic activities include (but are not limited to) expenditures made by the guiding establishments on inputs required for trips (such as food provisions, equipment, vehicles, etc.) and money spent in the local economy due to the salaries of guide workers. These effects, known as multiplier effects, were estimated using the IMPLAN economic impact software, an input-output model that tracks the flow of expenditures made by households and businesses in the state. The model traces the effect of any one industry (in this case the guiding industry) on all other industries, and general economic activity, including how a change in one industry would impact the businesses that contribute to the industry as suppliers.

Including these multiplier effects, we estimate that the Maine guiding industry contributed $56,525,954 in revenue to Maine's economy. The industry also supported 6,968 jobs in many other sectors throughout the economy because of the multiplier effects, which provided an estimated $14, 924,993 in labor income. The contribution of guiding establishments, including multiplier effects, is reported in Table 11.

Table 11. Maine Registered Guides Contribution to the Maine Economy

	Revenue	Labor Income	Employment
Establishment Impact	$39,105,000	$9,041,710	4,740
Multiplier	$17,420,954	$5,883,283	2,228
Total	$56,525,954	$14,924,993	6,968

4. YOUTH CAMPS AND COLLEGES

In connection with the Maine Registered Guides survey effort, Ann Ingerson of the Wilderness Society conducted a survey of Maine Youth Camps and Colleges using a modified version of the questionnaire sent to professional guides in order to obtain information on the human-powered recreation outings sponsored by these establishments (Appendix C). Given that Maine Youth Camps and Colleges both provide their respective campers/students with outdoor activities, this project wanted to gauge the extent to which these entities utilized the services of Registered Maine Guides, the economic contribution of these entities towards the human-powered recreation industry and obtain any insight these entities may have into changing recreational habits of youths.

Work by Planning Decisions, Inc. for the Maine Youth Camps Association (2005) estimates that there are 190 youth camps in Maine. A total of 44 youth camps, and 8 colleges responded to the current project's request for information. Responding camps indicated that approximately 10 percent of them employed the services of a guide to assist in leading camp sponsored trips; while 38 percent of colleges utilized guides for their trips. Of those camps and colleges that employ guides, an average of $5,000 per camp or college was spent on guiding services. In total, responding camps indicated that 1,151-day trips and 121 multi-day trips were completed last year. On average, each camp made eight one-day trips, and 10 multi-day trips and an estimated 7,117 campers were served over the course of the year on these trips. Further, approximately 81 percent of the campers served by these trips came from out of state, information that is again consistent with perceiving guided trips as components of the outdoor recreation tourism industry.

Table 12. Profile of Trip Sponsoring Youth Camps, 2007

Characteristics	Responding Camps
Percent Employing Maine Guides	23%
Average spending (per camp) on Guides	$5,000
Percentage of Campers from out-of-state	81%
Total Number of One-Day trips	1,151
Total Number of Multi-Day trips	667
Total number of campers served	7,117
Average number of FTE workers (for trips)	4
Average Years in Operation	62
Percent of trips focused on human-powered recreation (average per camp)	98%

Trip fees are charged in many instances to partially, if not fully, cover the expense of these recreational activities provided at a camp. Of interest, 50 percent of responding camps indicated that the trip fees charged do not cover the full cost of the trip, while the other half of survey respondents indicated that trip fees did cover the entire cost of the trip at their camp. For those camps where the trip fee *did not* cover the entire cost, respondents estimated that only about 28 percent of the cost of the trip was covered by the fee. Per Table 13, Kayak trips were the most expensive trip offered to campers.

The most popular trips indicated by camps and colleges were backpacking, canoeing, hiking and whitewater rafting. Interestingly, both camps and colleges mentioned a perceived increase in popularity of rock climbing. Survey participants were also asked to discuss trends associated with the activities listed in Table 13. Respondents indicated that canoeing and kayaking were the two activities perceived as experiencing the greatest increase in popularity. A majority of respondents also indicated that backpacking, hiking, whitewater rafting and wildlife watching were experiencing no change in popularity. No activity was seen as experiencing a significant decrease in popularity.

Table 13. Average Daily Trip Fee

Activity	Fee ($)
ATV	N/A
Backpack	67
Bike	48
Canoe	82
Dogsled	N/A
Hike	70
Hunt	N/A
Fishing	N/A
Kayak	130
Marine Fishing	N/A
Boating	N/A
Nature Photography	N/A
Cross Country Skiing	N/A
Sailing	N/A
Snow shoeing	N/A
Snowmobiling	N/A
Whitewater Rafting	80
Wildlife Watching	80

Camps and colleges also reported spending money on contracts to organize and lead the trips (excluding guiding fees), and making non-payroll expenditures associated with these activities. Fifty percent of camp respondents indicated that they spent less than $10,000 on payroll or contracts (not including the guiding fee) for the trips; 23 percent reported spending between $11,000 and $30,000 and the remaining respondents reported spending more than $30,000. In total, camps reported a weighted total of approximately $1.1 million dollars in payroll or contract spending to run the outdoor recreation trips. Additionally, 57 percent of camps reported spending between $1 and 10,000 on non-payroll expenditures associated with the trips. An additional one-fifth reported spending

$11,000 to $30,000. In total, the reported weighted total on non-payroll expenditures was $889,000. Clearly, youth camp outdoor recreation trips contribute to Maine's outdoor guiding industry and may warrant further investigation.

5. SUMMARY AND CONCLUSIONS

The Maine Guiding industry generated an estimated $39.1 million in sales, supported 4,740 full- and part-time jobs, and provided $9 million in employee earnings. Counting multiplier effects, the guiding industry contributed $56.5 million in sales to the Maine economy, and supported 6,968 jobs that provided $14.9 million in earnings.

There are a number of factors present in the industry that could contribute to future growth or decline in the guiding industry that must be carefully monitored. First, a recent study by Pergams and Zaradic (2006) finds "a fundamental and pervasive decline in nature recreation" (pg. 3) with declines in participation ranging from –1.0% to 1.3% per year. Consistent with these findings, some of Maine's primary human-powered recreation sites, the North Maine Woods and Baxter State Park, have experienced declines in visitation. The declines have in part been explained by a decrease in demand for the longer trips often associated with these sites.

However, data available from the Outdoor Industry Foundation finds that participation in outdoor recreation grew nationally by six percent between 1998 and 2004 (Outdoor 2005). It will be important moving forward to understand the trends in activities that are experiencing either an increase or decrease in popularity so that Guides may be well positioned to meet demands. Some of the activities that have been show to experience the greatest increase in participation are canoeing, kayaking and snowshoeing; all activities that Maine Guides have experience guiding (per Table 5). Studies have recently shown that while other types of outdoor recreation have experienced decline (ex: car camping) human-powered recreation activities have not experienced such a decrease. Potential opportunities may exist for Maine guides given that increasingly guides are leading more and more human-powered trips (Table 10) and may have experience in some of the popular outdoor recreation activities. Trends may offer an opportunity for guides to adjust their current trip offerings by offering shorter experiences, changing activities or working with others in the tourism industry to offer ‘all-inclusive’ packages that include lodging and meals.

Directions for Future Research

This project was initiated as a means to not only understand the human-powered recreation industry in Maine, but also the specific role of Maine guides in this industry. The information included within this report serves as a benchmark for this industry, upon which future analysis can be used for comparison. With respect to future efforts, we respectfully submit recommendations based on lessons learned from this current effort. Future survey efforts may wish to gather information not only about the guiding businesses themselves, but also about the clients being served. In particular the socioeconomic status and demographics of the clients would provide the opportunity to present a ‘client profile’ for Maine guiding services. This would assist Maine guiding establishments in directing the type of services they offer towards the ‘typical’ Maine client. Additionally, this report was only able to capture the economic implications associated with the guiding services. Anecdotal evidence suggests that many clients arrive in Maine ahead of their guided trip, and may spend time in Maine after their trip.

Direct collection of information from clients on their pre/post trip habits would provide an excellent source of data on the full economic implications of their visit.

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Appendix A: Fall and Summer Version of Professional Guides Survey, adapted from Web

Maine Guiding and Recreation

Welcome to the Maine Guiding and Recreation Survey

We are asking for your help in gathering information on guiding and recreation activities in Maine by participating in this research study. This information will assist University of Maine researchers in determining the impact that guiding activities have on Maine's economy. The Maine Wilderness Guides Organization requested this study, which is being funded by the Jessie B. Cox Charitable Trust.

The survey will ask you questions about your guiding and recreation activities here in Maine. You have been asked to participate in this study because you or your establishment provides guiding or recreational trip services. Your participation is voluntary, however your input is very important to the success of the study. You do not have to complete the entire survey if you are uncomfortable with specific questions. The entire survey should take you 10 minutes. Except for your time and inconvenience, there are no foreseeable risks to you participating in this survey. Please note that the information you provide will be treated in professional confidence; your survey answers will be presented only in groups combined with information from other guides in Maine. Your responses will be stored in an electronic database for one year. Completion of the survey indicates that you have read and understood the information presented above. If you have any questions or comments about the study, please contact Caroline Noblet at (207) 581-3172.
PLEASE NOTE: In this survey we are interested in your guiding and recreation activities during the LAST TWO SEASONS (Summer and Fall). We will ask you to complete another voluntary survey in about six months detailing your winter and spring activities.

INSTRUCTIONS: Please click on 'NEXT PAGE' to get started. For each question, please select the answer most appropriate to you and then click 'Next Page' to move onto the next question.

If you have any questions about your rights as a research participant you may contact: Gayle Anderson, Special Assistant for Research Administration, at (207) 581-1498.

1) Please check the option that best describes you or your business:

❍ I am a full time guide
❍ I am a part time guide
❍ I am not a guide, but my organization does offer trips for a fee
❍ I do not provide guiding services

2) Are you a Registered Maine Guide?

❍ Yes
❍ No

3) In what year was your guiding business established in Maine?

____

4) What percent of your clients do you estimate live out of state?

____

5) Approximately how many trips, of each length, did your business guide during the summer and fall?
(if you do not lead trips of a particular length, please leave blank)

1/2 Day Trips ____________________________
Full Day Trips ____________________________
Multi-Day Trips ____________________________

6) On a typical trip, how many clients did you serve for each trip type?
(if you do not lead trips of a particular length, please leave blank)

1/2 Day Trips ____________________________
Full Day Trips ____________________________
Multi-Day Trips ____________________________

7) Which of the following types of activities have been the primary focus of a trip you offered during this past summer and fall?

❑ ATV
❑ Backpacking
❑ Biking
❑ Canoe
❑ Hunting
❑ Hiking
❑ Inland Fishing
❑ Kayak
❑ Marine Fishing
❑ Motor Boating
❑ Nature Photography
❑ Sailing
❑ Whitewater rafting
❑ Wildlife watching
❑ Other (please specify):

____

8) Please comment on growth trends for each of these activities over the past 5 years.

	Increasing	No Change	Decreasing
ATV	❍	❍	❍
Backpacking	❍	❍	❍
Biking	❍	❍	❍
Canoe	❍	❍	❍
Hunting	❍	❍	❍
Hiking	❍	❍	❍
Inland Fishing	❍	❍	❍
Kayak	❍	❍	❍
Marine Fishing	❍	❍	❍
Motor Boating	❍	❍	❍
Nature Photography	❍	❍	❍
Sailing	❍	❍	❍
Whitewater Rafting	❍	❍	❍
Wildlife watching	❍	❍	❍

9) Please indicate the average trip price, per client, for a full-day trip that featured each of the activities listed below.
(If you do not lead a particular trip type, please leave blank)

ATV ______________________
Backpacking ______________________
Biking ______________________
Canoe ______________________
Hunting ______________________
Hiking ______________________
Inland Fishing ______________________
Kayak ______________________
Marine Fishing ______________________
Motor Boating ______________________
Nature Photography ______________________
Sailing ______________________
Whitewater Rafting ______________________
Wildlife watching ______________________

10) How much revenue did your business take in <u>during the summer and fall seasons</u>?

- ❍ Zero
- ❍ Zero to $10K
- ❍ $11K to $30K
- ❍ $31K to $50K
- ❍ $51K to $75K
- ❍ $76K to $100K
- ❍ $101K to $200K
- ❍ $201K to $300K
- ❍ More than $300K

11) Approximately how many <u>total</u> <u>unpaid</u> hours a week did family members or unpaid apprentices assist you in preparing, organizing or otherwise engaging in guiding related activities during the summer and fall seasons?

____

12) How many <u>paid</u> workers or contractors did your establishment employ <u>during the summer and fall</u> (including yourself):

Full-time employees ____________________

Part-time employees ____________________

13) How much did your business spend on payroll (including benefits and your own salary) <u>during the summer and fall</u>?

- ❍ Zero
- ❍ Zero to $10K
- ❍ $11K to $30K
- ❍ $31K to $50K
- ❍ $51K to $75K
- ❍ $76K to $100K
- ❍ $101K to $200K
- ❍ $201K to $300K
- ❍ More than $300K

14) How much did your business spend on non-payroll expenditures (example: food for trips, supplies, etc.) <u>during the summer and fall</u>?

- ❍ Zero
- ❍ Zero to $10K
- ❍ $11K to $30K
- ❍ $31K to $50K
- ❍ $51K to $75K
- ❍ $76K to $100K
- ❍ $101K to $200K
- ❍ $201K to $300K
- ❍ More than $300K

15) When is your busiest season (please check one)?

- ❍ Spring
- ❍ Summer
- ❍ Fall
- ❍ Winter

16) What counties of Maine do you typically guide trips to (please check all that apply)?

- ❑ Aroostook
- ❑ Androscoggin
- ❑ Cumberland
- ❑ Franklin
- ❑ Hancock
- ❑ Kennebec
- ❑ Knox
- ❑ Lincoln
- ❑ Oxford
- ❑ Penobscot
- ❑ Piscataquis
- ❑ Sagadahoc
- ❑ Somerset
- ❑ Waldo
- ❑ Washington
- ❑ York

17) In what percent of your guided or recreation trips is people-powered recreation (i.e. non-motorized, for example hiking) the primary purpose of your trip?

____

18) In what percent of your guided or recreation trips is motorized recreation (ex: ATVs or motorboats) the primary purpose of your trip?

____

19) In what percent of your guided or recreation trips do you use motorized recreation vehicles in order <u>to access</u> areas in which to participate in non-motorized recreation as the primary purpose of the trip (ex: ATV to a remote area in order to wildlife watch)?

____

Thank you for your help.

Appendix B: Winter and Spring Version of Professional Guides Survey, adapted from Web

Maine Guiding and Recreation

Welcome to the Maine Guiding and Recreation Survey
WINTER AND SPRING VERSION

We are asking again for your help in gathering information on guiding and recreation activities in Maine by participating in this research study. This information will assist University of Maine researchers in determining the impact that guiding activities have on Maine's economy. The Maine Wilderness Guides Organization requested this study, which is being funded by the Jessie B. Cox Charitable Trust.

The survey will ask you questions about your guiding and recreation activities here in Maine. You have been asked to participate in this study because you or your establishment provides guiding or recreational trip services. Your participation is voluntary, however your input is very important to the success of the study. You do not have to complete the entire survey if you are uncomfortable with specific questions. The entire survey should take you 10 minutes. Except for your time and inconvenience, there are no foreseeable risks to you participating in this survey. Please note that the information you provide will be treated in professional confidence; your survey answers will be presented only in groups combined with information from other guides in Maine. Your responses will be stored in an electronic database for one year. Completion of the survey indicates that you have read and understood the information presented above. If you have any questions or comments about the study, please contact Caroline Noblet at (207) 581-3172.
PLEASE NOTE: **We thank you if you participated in the previous survey that looked at the summer and fall seasons**. In this survey we are interested in your guiding and recreation activities during the LAST TWO SEASONS (WINTER AND SPRING).

INSTRUCTIONS: Please click on 'NEXT PAGE' to get started. For each question, please select the answer most appropriate to you and then click 'Next Page' to move onto the next question.

If you have any questions about your rights as a research participant you may contact: Gayle Anderson, Special Assistant for Research Administration, at (207) 581-1498.

1) Please check the option that best describes you or your business:

- ❍ I am a full time guide
- ❍ I am a part time guide
- ❍ I am not a guide, but my organization does offer trips for a fee
- ❍ I do not provide guiding services

2) Are you a Registered Maine Guide?

- ❍ Yes
- ❍ No

3) In what year was your guiding business established in Maine?

____

4) What percent of your clients do you estimate live out of state?

____

5) Approximately how many trips, of each length, did your business guide during the WINTER AND SPRING?
(if you do not lead trips of a particular length, please leave blank)

1/2 Day Trips ____________________________
Full Day Trips ____________________________
Multi-Day Trips ____________________________

6) On a typical trip, how many clients did you serve for each trip type?
(if you do not lead trips of a particular length, please leave blank)

1/2 Day Trips ____________________________
Full Day Trips ____________________________
Multi-Day Trips ____________________________

7) Which of the following types of activities have been the primary focus of a trip you offered during this past WINTER AND SPRING?

- ❑ Backpacking
- ❑ Biking
- ❑ Canoe
- ❑ Dog Sledding
- ❑ Hiking
- ❑ Hunting
- ❑ Ice Climbing
- ❑ Ice Fishing
- ❑ Inland Fishing (not including ice fishing)
- ❑ Kayak
- ❑ Marine Fishing
- ❑ Nature Photography
- ❑ Skiing (Cross Country)
- ❑ Skiing (Downhill)
- ❑ Snow Shoeing
- ❑ Snowmobile
- ❑ Whitewater Rafting
- ❑ Wildlife watching (including bird watching)
- ❑ Winter Camping
- ❑ Winter Mountaineering

8) Please comment on growth trends for each of these activities over the past 5 years.

	Increasing	No Change	Decreasing
Backpacking	❍	❍	❍
Biking	❍	❍	❍
Canoe	❍	❍	❍
Dog sledding	❍	❍	❍
Hiking	❍	❍	❍
Hunting	❍	❍	❍
Ice climbing	❍	❍	❍
Ice Fishing	❍	❍	❍
Inland Fishing (not including ice fishing)	❍	❍	❍
Kayak	❍	❍	❍
Marine Fishing	❍	❍	❍
Nature Photography	❍	❍	❍
Skiing (cross country)	❍	❍	❍
Skiing (downhill)	❍	❍	❍
Snow Shoeing	❍	❍	❍
Snowmobile	❍	❍	❍
Whitewater Rafting	❍	❍	❍
Wildlife Watching (including bird watching)	❍	❍	❍
Winter Camping	❍	❍	❍
Winter Mountaineering	❍	❍	❍

9) Please indicate the average trip price, per client, for a full-day trip that featured each of the activities listed below.

(If you do not lead a particular trip type, please leave blank)

Backpacking ______________________
Biking ______________________
Canoe ______________________
Dog Sledding ______________________
Hiking ______________________
Hunting ______________________
Ice Climbing ______________________
Ice Fishing ______________________
Inland Fishing (not including ice fishing) ______________________

Kayak ______________________
Marine Fishing ______________________
Nature Photography ______________________
Skiing (Cross Country) ______________________
Skiing (Downhill) ______________________
Snowmobile ______________________
Snowshoeing ______________________
Whitewater Rafting ______________________
Wildlife Watching (including bird watching) ______________________
Winter Camping ______________________
Winter Mountaineering ______________________

10) How much revenue did your business take in <u>during the WINTER AND SPRING seasons</u>?

- ❍ Zero
- ❍ Zero to $10K
- ❍ $11K to $30K
- ❍ $31K to $50K
- ❍ $51K to $75K
- ❍ $76K to $100K
- ❍ $101K to $200K
- ❍ $201K to $300K
- ❍ More than $300K

11) Approximately how many <u>total</u> <u>unpaid</u> hours a week did family members or unpaid apprentices assist you in preparing, organizing or otherwise engaging in guiding related activities during the WINTER AND SPRING seasons?

____

12) How many <u>paid</u> workers or contractors did your establishment employ <u>during the WINTER AND SPRING</u> (including yourself):

Full-time employees ______________________
Part-time employees ______________________

13) How much did your business spend on payroll (including benefits and your own salary) <u>during the WINTER AND SPRING</u>?

- ❍ Zero
- ❍ Zero to $10K
- ❍ $11K to $30K
- ❍ $31K to $50K
- ❍ $51K to $75K
- ❍ $76K to $100K
- ❍ $101K to $200K
- ❍ $201K to $300K
- ❍ More than $300K

14) How much did your business spend on non-payroll expenditures (example: food for trips, supplies, etc.) <u>during the WINTER AND SPRING</u>?

❍ Zero
❍ Zero to $10K
❍ $11K to $30K
❍ $31K to $50K
❍ $51K to $75K
❍ $76K to $100K
❍ $101K to $200K
❍ $201K to $300K
❍ More than $300K

15) When is your busiest season (please check <u>one</u>)?

❍ Spring
❍ Summer
❍ Fall
❍ Winter

16) What counties of Maine do you typically guide trips to in the WINTER AND SPRING (please check all that apply)?

❑ Aroostook
❑ Androscoggin
❑ Cumberland
❑ Franklin
❑ Hancock
❑ Kennebec
❑ Knox
❑ Lincoln
❑ Oxford
❑ Penobscot
❑ Piscataquis
❑ Sagadahoc
❑ Somerset
❑ Waldo
❑ Washington
❑ York

17) In what percent of your guided or recreation trips in the <u>WINTER AND SPRING</u> is people-powered recreation (i.e. non-motorized, for example cross country skiiing) the primary purpose of your trip?

____

18) In what percent of your guided or recreation in the <u>WINTER AND SPRING</u> trips is motorized recreation (ex: snowmobiles) the primary purpose of your trip?

____

19) In what percent of your guided or recreation trips in the WINTER AND SPRING trips do you use motorized recreation vehicles in order <u>to access</u> areas in which to participate in non-motorized recreation as the primary purpose of the trip (ex: snowmobile to a remote area in order to access a winter climbing site)?

____

20) Of all the trips that you guide, please list the three most popular trip activities (include trip activities for ALL seasons).

Most Popular Trip Activity __________________________
2nd Most Popular Trip Activity __________________________
3rd Most Popular Trip Activity __________________________

Thank you for your help.

Appendix C: Youth Camps and Colleges Survey

Maine Guiding and Recreation Survey

Dear Camp Owner:

Welcome to the Maine Guiding and Recreation Survey –**Youth Camps Version.**

This survey is seeking information from **camps that offer remote trips**. If your camp does not offer such trips, please disregard the survey. All survey information will be confidential, and only summaries will be reported. This information will assist University of Maine researchers in determining the impact that guiding and trips have on Maine's economy. The Maine Wilderness Guides Organization requested this study, which is being funded by the Jessie B. Cox Charitable Trust.

Though your participation is completely voluntary, we urge you to contribute to help us develop accurate and complete information about trips in rural Maine. Many different groups program for wilderness trips, yet we have very incomplete information about the amount of backcountry use or the contribution these activities make to Maine's economy. This will be the first study to collect comprehensive trip data from guides, camps and colleges. This information will help state agencies plan for multiple uses of state lands and will support the Maine Wilderness Guides Organization (www.mainewildernessguides.org) mission "to provide a unified voice for the profession of wilderness guiding while maintaining the highest ethical, educational, environmental standards, and to advocate for the preservation of remote woods and waters."

Ann Ingerson, of The Wilderness Society, is collecting information from summer camps, colleges, and other entities who run trips similar to those offered by commercial guides, but where the back-country trip activity might be a small portion of the total operation. Using an on-line survey, University of Maine researchers are collecting similar information from professional guides. Please feel free to contact Ann with questions at (802) 586-9625 or ann_ingerson@tws.org.

INSTRUCTIONS: For each question, please check the answer(s) most appropriate or fill in the blank.

Please return the completed survey in the enclosed self-addressed stamped envelope by April 30, 2007.

Thank you for your help,

Ann Ingerson
The Wilderness Society

Maine Guiding and Recreation Survey

Please check the option that best describes your organization:

____ We are a youth camp
____ We are a college/university outing group
____ We are a college program that offers trips as part of our instructional curriculum

Does your organization offer trips in Maine for a fee or as part of your general activities (i.e. costs covered partly by general tuition)? *(If no, please discard this survey and thank you very much for your time.)*

____Yes
____No

Do you employ the services of a registered Maine Guide to lead any of your trips?

____Yes
____No
If Yes, approximately what percent of your trips are led by Registered Maine Guides that you have hired?
In what year did your recreation program or camp start offering trips in Maine?

______ (year)

What percent of your clients, students or campers, for Maine trips do you estimate come from out of state?

_______ %

Approximately how many single-day Maine outing trips, in total, did you offer during this past year?

_________________ (fill in number)

Approximately how many multi-day Maine outing trips, in total, did you offer during this past year?

_________________ (fill in number)

Approximately how many students or campers, in total, participated in your Maine outing trips during this past year?

_________________ **(fill in number)**

Which of the following types of activities have been the focus of at least one trip you offered during the past year? (check all that apply, including for trips that offer multiple activities)

____ATV
____Backpacking
____Biking
____Canoeing
____Cross-Country Skiing
____Dogsledding
____Hunting
____Hiking
____Inland Fishing
____Kayak
____Marine Fishing
____Motor Boating
____Nature Photography
____Sailing
____Snowshoeing
____Snowmobiling
____Whitewater rafting
____Wildlife watching
____Other (please specify)

If you selected other, please specify:
____

Please comment on the changing popularity of each of these activities over the past 5 years.

	Increasing	No Change	Decreasing	Don't Know/ No Opinion
ATV				
Backpacking				
Biking				
Canoeing				
Cross-Country Skiing				
Dogsledding				
Hunting				
Hiking				
Inland Fishing				
Kayak				
Marine Fishing				
Motor Boating				
Nature Photography				
Sailing				
Snowshoeing				
Snowmobiling				
Whitewater Rafting				
Wildlife watching				

Additional comments: ____

Do special trip fees charged to students or campers cover the full cost of each trip?
____ Yes
____ No

If not, approximately what percentage of trip costs are covered by special trip fees (as opposed to general tuition)?
____

Please indicate the average daily trip fees for a trip that primarily featured each of the activities listed below. *(If you do not offer a particular trip type, please leave blank)*

ATV ______
Backpacking ______
Biking ______
Canoe ______
Cross-Country Skiing ______
Dogsledding ______
Hunting ______
Hiking ______
Inland Fishing ______
Kayak ______
Marine Fishing ______
Motor Boating ______
Nature Photography ______
Sailing ______
Snowshoeing ______
Snowmobiling ______
Whitewater Rafting ______
Wildlife watching ______
Other (please specify)______

How much revenue did your program collect in fees for outdoor recreation *trips* during the past year?

____Zero
____Zero to $10K
____$11K to $30K
____$31K to $50K
____$51K to $75K
____$76K to $100K
____$101K to $200K
____$201K to $300K
____More than $300K

How many paid full-time equivalent workers or contractors did your program employ *to run trips* during the last year (including yourself):

_____ Full-time employees
_____ Part-time employees

How much did your program spend on payroll or contracts *to run trips* (not including contracted guides, but including benefits and your own salary) during the past year?

____Zero
____Zero to $10K
____$11K to $30K
____$31K to $50K
____$51K to $75K
____$76K to $100K
____$101K to $200K
____$201K to $300K
____More than $300K

How much did your program spend on non-staff guiding services for trips during the past year?

____Zero
____Zero to $10K
____$11K to $30K
____$31K to $50K
____$51K to $75K
____$76K to $100K
____$101K to $200K
____$201K to $300K
____More than $300K

How much did your program spend on non-payroll expenditures for trips (example: food for trips, supplies, etc.) during the past year?

____Zero
____Zero to $10K
____$11K to $30K
____$31K to $50K
____$51K to $75K
____$76K to $100K
____$101K to $200K
____$201K to $300K
____More than $300K

When is your busiest season for trips (please check one)?

____Spring
____Summer
____Fall
____Winter

What counties of Maine do you typically take trips to (please check all that apply)?

____Aroostook
____Androscoggin
____Cumberland
____Franklin
____Hancock
____Kennebec
____Knox
____Lincoln
____Oxford
____Penobscot
____Piscataquis
____Sagadahoc
____Somerset
____Waldo
____Washington
____York

In what percent of your guided or recreation trips is people-powered recreation (i.e. non-motorized, for example hiking) the primary purpose of your trip?
______ %

In what percent of your guided or recreation trips is motorized recreation (ex: ATVs or motorboats) the primary purpose of your trip?
______ %

In what percent of your guided or recreation trips do you use motorized recreation vehicles in order <u>to access</u> areas in which to participate in non-motorized recreation as the primary purpose of the trip (ex: ATV to a remote area in order to wildlife watch)?
______ %

Thank you for your help.