

STATE OF MAINE  
LAND USE REGULATION COMMISSION

IN THE MATTER OF DEVELOPMENT	)	Rebuttal Testimony of
APPLICATION DP 4889	)	Bruce M. Lockwood
CHAMPLAIN WIND, LLC	)	on behalf of Champlain Wind, LLC
BOWERS WIND PROJECT	)	

On behalf of Champlain Wind, LLC (“Champlain”), Bruce Lockwood is submitting this rebuttal testimony in support of DP 4889 for the Bowers Wind Project (“Project” or “Bowers Wind Project”).

**I. QUALIFICATIONS AND BACKGROUND**

**A. Bruce Lockwood**

My name is Bruce Lockwood, President, Owner and Founder of Portland Research Group, Inc. I have worked as a market researcher throughout my nearly 27-year professional career. Positions I have held have touched each of the major perspectives of market research: Consultant/Vendor, Advertising, and End-User. During my tenure I have developed a hybrid research method to test direct marketing campaigns for an advertising agency, worked at Marks & Spencer in England to help bridge the advantages of database marketing with primary market research, conceived, managed and conducted the study, “Futures at Risk”, for the Finance Authority of Maine (FAME), which created the foundation for the development of the NextGen College Savings program, established the formal market research department and function at IDEXX Laboratories, the world leader in animal health diagnostics, and designed a program for auditing and measuring the performance of events worldwide for IBM Corporation.

My expertise covers a broad range of data collection methodologies including telephone interviews, mail surveys, web surveys, focus groups (I have moderated several hundred groups), and in-depth interviews (in-person, telephone). The methods have been applied to both

consumer and business-to-business market research. I have been a member in good standing of the Market Research Association (MRA) for over 20 years.

In addition, I was a continuous end-to-end A.T. Thru-Hiker in 1983 (“Gashly Crumb Hikers”) – my group was in the range of around the 1,225<sup>th</sup> hikers ever to complete the entire National Scenic Trail, which is now traversed by 1,200 hikers each year. For over 25 years I have been a member of the Appalachian Mountain Club and Appalachian Trail Conservancy (previously Appalachian Trail Conference). Current Memberships in outdoor organizations also include Portland Trails and the Cape Elizabeth Land Trust.

In 1983, I received a B.S. in Operations Research from the Carroll School of Management at Boston College and was awarded a Dean’s Letter of Commendation. In 1992, I received a M.B.A. from the Babson College Graduate School of Business, where I was the first American intern hired by Marks & Spencer, a major retailer in the United Kingdom. A copy of my resume is attached as Exhibit A.

The purpose of this testimony is to briefly describe the methods used to collect and evaluate information related to the typical use of lakes within the study area, and to respond to specific points raised by LURC’s third-party scenic reviewer, Dr. James Palmer in his June 3, 2011 VIA review as well as comments submitted by Intervenor Gary Campbell.

## **B. Company Qualifications and Background**

Portland Research Group is a full-service, independent market research consulting company, which has been in business for over 11 years. Located in Portland, Maine, it offers a full breadth of market research services for consumer and business-to-business research. Clients include organizations from both the public and private sectors with local, national and/or international presence.

Related work includes research on seasonal outdoor activities for the Vermont Department of Tourism Marketing, community needs assessments for Maine Medical Center, Mercy Hospital, Maine Conference United Church of Christ, VNA Home Health & Hospice and Portland Public Library. Recently, Portland Research Group conducted two studies for another Wind Energy Development: Trail intercepts at the summit of the East Peak of Little Bigelow to measure the impact of a wind farm on the expectations, enjoyment and likelihood to return of hikers using the Bigelow Preserve and a web survey among outdoor activity enthusiasts, particularly hikers in the Western Maine Mountains, to measure the impact of a wind energy facility on expectations, enjoyment and likelihood to return to regions in Maine to participate in their favorite outdoor activities. Portland Research Group is known for bringing high integrity market research methods to studies in a variety of industries involving various types of consumer and business participants.

## **II. OUTDOOR ACTIVITIES USERS RESEARCH**

Portland Research Group conducted market research consisting of two surveys, a telephone survey and a snowmobiler survey, among people who participate in outdoor activities that could take place within the identified region where the proposed Bowers Wind Project would be developed (“Study Area”). The purpose of the research was to: 1) assess the typical awareness and usage of the Study Area among likely users and measure the expectations of those users for seeing “human-made” structures, including commercial wind power projects; 2) assess the perceived impact of such structures on users’ enjoyment of outdoor activities; and 3) understand the likelihood that users would return to the Study Area if structures such as wind turbines were constructed. As part of the assessment, the research measured respondents’ knowledge of and commitment toward wind energy projects.

## **A. Telephone Survey**

The study area for the telephone survey focused on potential users of the region within 8 miles of the proposed Bowers Wind Project and included areas proximate to scenic lakes of state or national significance. Potential users were comprised of people from Maine and New England who have participated in one of an identified list of outdoor activities within Maine in the last three years.

### *Methodology*

Potential study participants were identified from a listed number database managed by a well-known and respected vendor in the market research industry, InfoUSA. Potential participants were defined as those residing within the six New England States who identified boating and sailing, camping and hiking, fishing, hunting, and/or other general outdoor sports as a hobby and/or interest. Essentially, a stratified random sample was pulled, inclusive of 800 records from each New England State, excluding Maine, from which 1,000 records were randomly selected. A supplemental sample was developed of Maine residents who live within 50 miles of the Study Area to ensure that people familiar with the region were included in the research. No outdoor activity requirements were used to pull the supplemental sample.

All potential participants were screened using the same criteria for qualification in the study and consisted of adults who were eighteen years of age or older and had, within the last three years, personally participated in at least one of the following outdoor activities in Maine: ATV Riding, Birding, Boating (motor), Camping, Canoeing or Kayaking, Fishing, Foraging for wild plants or mushrooms, Hiking or Walking, Hunting, Skiing (Cross Country or Nordic), Snowmobiling, and/or Snowshoeing.

A total of 191 telephone interviews were conducted between January 10, 2011 and January 18, 2011 using a structured questionnaire consisting of 35 questions. The New England sample produced 169 completed interviews and 22 came from the supplemental Maine sample. All responses were entered directly onto our CATI (Computer Aided Telephone Interviewing) System during interviewing. Portland Research Group employees edited responses, coded open-ended and other specific questions that allow for non-listed responses to be recorded, produced crosstabulations, and analyzed results. A report was submitted to Stantec Consulting on behalf of Champlain Wind, LLC. A copy of the Telephone Research Report is attached as Exhibit B.

### *Key Findings*

A summary of the Report's key findings is provided below.

- Of the “qualifying outdoor activities,” hiking (52%), fishing (33%), and canoeing or kayaking (26%) are the three activities respondents most commonly participate in.
- More than one-half (54%) of respondents spend on average, more than 100 days or more in Maine each year. One-third (31%) on average, spend fewer than 20 days in Maine each year.
- Two-fifths of respondents (42%) spend fewer than 20 days on average each year participating in “qualifying” outdoor activities in Maine.
- More than one-third (37%) of respondents are not aware of any of the eight lakes located in the Study Area that were included in the research. Out of all individuals asked as part of the study, just 5% (31 of 580 – entire contact total that were asked) use at least one of the eight lakes in the Study Area more than just rarely.
- One-tenth (10%; 3 of 31) who use one of the eight lakes in the Study Area consider it likely to see energy facilities such as wind farms in the Study Area. Three-fifths (61%; 19 of 31) consider it unlikely to see wind farms in the Study Area.
- Just over one-half of those who use one of the eight lakes in the Study Area reported that seeing energy facilities such as wind farms in the Study Area would have a positive (16%; 5 of 31) or neutral/no impact (36%; 11 of 31) affect on their

overall enjoyment of the region. Almost one-half (48%; 15 of 31) indicated seeing such structures would have a negative impact on their enjoyment.

- Over one-half of those who use the Study Area reported seeing wind turbines would make them either more likely (23%; 7 of 31) or not change their likelihood (32%; 10 of 31) of returning to the Study Area. Less than one-half (45%; 14 of 31) said they would be less likely to return to the Study Area.
- One-half of all respondents (52%) support the development of commercial-scale wind energy development in Maine. One-eighth of respondents (13%) do not support such developments.
- Over two-thirds (70%) of all respondents have seen wind turbines outside the State of Maine and almost one-half (48%) have seen wind turbines within the State of Maine.

## **B. Snowmobiler Survey**

This study was designed to target a specific user group, snowmobilers, who frequent a region located near the proposed Bowers Wind Project. This survey was designed for administration to users located directly under existing wind turbines so that participants could respond to the questions while “experiencing” a commercial wind energy facility in operation.

### *Methodology*

Portland Research Group attended the Second Annual Stetson Wind Snowmobile Ride at First Wind’s Stetson Mountain facility located about five miles (by air) north of the site of the proposed Bowers Wind Project. Employees of Portland Research Group intercepted snowmobilers who attended the event and facilitated a self-administered questionnaire with participants. Adults, eighteen years of age and older, qualified to participate. All of the interviews were conducted the day of the event, Saturday, February 19, 2011, at the operation and maintenance building located at the Stetson Mountain facility.

Almost half (46%) of the estimated number of attendees (69 of approximately 150 attendees) completed a survey. The interviews followed a structured questionnaire consisting of

21 questions. A copy of our Snowmobiler Report detailing this survey is attached as Exhibit C.

### *Key Findings*

A summary of the Report's key findings is provided below.

- Respondents participate in a variety of outdoor activities in the Study Area, the top three being, Snowmobiling (84%; some riders did not classify themselves as snowmobilers), Fishing (81%), and Motor Boating (68%).
- Of the eight lakes included in the research, Lower Sysladobsis (92%), Bottle Lake (92%), and Duck Lake (92%) garnered the highest levels of awareness.
- Over one-half (56%) of respondents reported that they participate in outdoor activities either on or beside Lake Sysladobsis at least sometimes or more often, the highest of the eight lakes from the Study Area included in the research. Bottle Lake (55%), Junior Lake (54%) and Duck Lake (52%) are the only other lakes reportedly used at least sometimes by at least one-half of the respondents.
- Almost two-fifths (38%; 15 of 39) of respondents who use at least one of the eight lakes in the Study Area consider it likely to see energy facilities such as wind farms in the Study Area. Just a small percentage (13%; 5 of 39) considers it unlikely.
- One-half of the respondents (50%; 20 of 40) indicated that seeing energy facilities such as wind farms while participating in their most frequent outdoor activity in the Study Area would have a positive impact on their overall enjoyment. Just 5% (2 of 40) mentioned that seeing such facilities would have a negative impact on their enjoyment. Only seeing Snowmobile/ATV Trails would have a positive impact on overall enjoyment for a larger percentage of these respondents (72%; 30 of 42).
- One-half of the respondents (50%; 20 of 40) indicated that seeing energy facilities such as wind farms would make them more likely to return to the Study Area to participate in their outdoor activity of choice. Less than one in ten (8%; 3 of 40) would decrease their likelihood of returning.
- Almost three-quarters of all respondents (72%) support the development of commercial-scale wind energy in Maine.

### **III. RESPONSE TO DR. PALMER'S REVIEW**

Portland Research Group reviewed the document "Review of the Bowers Wind Project Visual Impact Assessment by James F. Palmer, dated April 28, 2011 and provided comments to

address specific points and questions raised by Dr. Palmer. These comments were included in the May 27, 2011 response from LandWorks and are summarized below. A copy of Portland Research Group's complete response to Dr. Palmer's comments is attached as Exhibit D. Although Dr. Palmer issued a revision dated June 3, 2011, it does not address the specifics of our May 2011 comments.

**A. Telephone Survey**

**1. Targeted to identify individuals who participate in type of outdoor activities typical for Study Area**

Dr. Palmer criticized the sample group as not being random and concluded that the survey could not be used to estimate the "extent, nature and duration of potential affected public uses of the area. As noted in our response to comments, the sample frame was constructed intentionally due to our hypothesis that only a very small portion of the general population would be aware of and regularly use the Study Area. As such, we targeted individuals who participate in the kinds of outdoor activities that are available in the Study Area. Since many of the users of the outdoor resources in Maine come from outside the State, primarily from other New England States, we felt it prudent to draw a sample from each New England State. In order to capture the opinions of those who live in fairly close proximity to the Study Area, we also garnered a "booster sample" (primary residence located within 50 miles of Study Area) from which we hoped to complete 50 interviews. We felt the combination of the two samples would increase our number of observations and our confidence in the results. Details of the research objectives, sampling plan and screening criteria are discussed in the response to comments.

Portland Research Group's hypothesis proved to be correct as only 3.06% of those contacted were aware of and participated in an outdoor activity on or beside one of the eight



lakes located within the Study Area within the last three years. Had we conducted a purely random sample using a Random Digit Dial (RDD) sample and achieved the same incidence of 3.06%, we would have interviewed just 12 people from a sample of 400 and 18 from a sample of 600 who use the area. Instead, we were able to interview 31 people who were aware of and had used the Study Area. This is more than double the number of a random sample of 400 and almost twice as many as we would have interviewed as part of a random sample of 600. The effect of our approach was to increase information from people who are aware of and actually use the area, which was an important part of the survey's purpose.

Our specific objective was to complete 50 interviews with people who are aware of and at least sometimes (rating of 4 to 10 on a scale where 1 means, "Never participate in the outdoor activity on or around the lake", and 10 means, "Regularly participate in the outdoor activity on or around the lake") use at least one of eight lakes located within the Study Area: Bottle, Duck, Lower Sysladobsis, Keg, Junior, Scraggly, Shaw, and Pleasant (locations defined in survey). We completed 31 of our target of 50 interviews.

Had we conducted a purely random sample of Mainers (using a RDD – Random Digit Dial and a cell phone number overlay sample), awareness and usage of the Study Area would have been a very small percentage of the total sample and would not have given us enough of the target segment to ask about expectations, impact on enjoyment and impact on likelihood to return. Even with the targeted sample, the percentage of those who participate in outdoor activities on or beside the lakes in the Study Area is small.

While the outdoor activity usage levels by age do not line-up with SCORP data in terms of Fishing and Hiking or Walking, the statement can be made based on the research that the Study Area garners very low awareness and usage.

## **2. Age Ranges**

Dr. Palmer commented on the age range of telephone survey participants as that range compares to Maine's SCORP for fishing, hiking and walking activities. As noted in our response to comments, the comparison correctly demonstrates that the survey is comprised of older respondents than those included in the Maine SCORP data. The data presented in the 2009 SCORP was analyzed based on a national survey of recreational activity conducted between 2002 and 2009. However, as shown in the table included in our response to comments, and attached hereto in Exhibit E, the opinions shared regarding expectations, enjoyment, likelihood to return and disposition on wind power are very consistent with those shared by respondents from other studies independent of this work. Such consistency between independent studies enhances the reliability of the work.

## **3. Effect on Enjoyment**

Dr. Palmer commented on the percentage of telephone interviewees (48%) who indicated that the presence of wind turbines would negatively affect their enjoyment of the area. As noted on page 18 of the Telephone Research report, 36% gave neutral ratings (4-7) indicating that seeing wind farms would have no effect on their enjoyment. Another way to express the findings to this question is 52% (just over half) indicated that seeing wind farms would have a positive impact or no impact on their enjoyment.

Dr. Palmer also commented on the number of interviewees that indicated the presence of turbines would affect their likelihood of returning to the area. These facts are correct that 32% of interviewees indicated the effect of seeing wind turbines on likelihood of returning would have a negative impact and 23% would have a positive impact. However, referencing page 19 of the Telephone Research Report, 45% indicated seeing wind farms would have no impact (rating of

4-7) on their likelihood of returning. In other words, two-thirds (68%) said seeing wind farms would have either no impact (45%) or a positive impact (23%) on their likelihood of returning to the Study Area for outdoor activities.

Finally, with respect to the telephone survey, Dr. Palmer commented on the absence of photosimulations as a component of the survey. While it is true that respondents did not see photo simulations from the numerous vantage points to specifically assess the visual impact of the Bowers project, 97% (30 of 31) who are aware and use the Study Area have seen wind turbines in Maine (94%; 29 of 31) and/or outside of Maine (58%; 18 of 31). Therefore, while those surveyed did not have a simulation of this Project, one can say that respondents familiar with the Study Area have a general understanding of the visual scope of commercial wind energy facilities. It would be a much different conclusion if just a small percentage of these respondents had previously seen wind turbines.

As stated previously, when compared to the results of several other independent research studies, the results of this survey are very consistent. While each Study Area for wind turbines is unique, the results from these other studies show remarkable consistency toward the disposition of commercial wind farm development. Please refer to Table 1, attached as Exhibit E for a summary of these results.

## **B. Snowmobiler Survey**

Dr. Palmer commented that the respondents to the snowmobile survey were a self-selecting group who were more willing to tolerate grid scale turbines and asked how the typical user would experience turbines. As noted in our response to comments, while this may be a true statement, one can also make the point that the snowmobilers are more representative of the

snowmobiler segment than the paragraph implies. Further, it is likely that curiosity influenced many snowmobilers to attend the gathering – curiosity rather than tolerance.

On pages 32 and 33 of Dr. Palmer’s April 28, 2011 Bowers VIA Review, an Associated Press (2011) news release about the gathering has been reprinted. The news release clearly states that there will be a barbecue lunch, which is an incentive to attend. In market research, we offer incentives for two reasons: improve cooperation to broaden the representation of a sample and to increase the speed of receiving results. The offer of a “barbecue lunch reception” likely acted like an incentive to broaden the “types” of snowmobilers who attended.

Several factors point to the fact that the snowmobiler respondents could in fact represent typical users of the Study Area.

- Snowmobilers from the research (see page 13 of the Snowmobiler Research Report) reported spending an average of 62 days (median of 30 days) participating in outdoor activities in the Study Area. As a result, they probably know the area well.
- Fishing (81%) in Maine within the past three years is almost as prevalent among these respondents as snowmobiling (84%). (See page 19 of the Snowmobiler Research Report)
- The majority of these respondents engage in outdoor activities in the Study Area throughout the year (See page 12 of the Snowmobiler Research Report): Winter (80%), Spring (55%), Summer (91%), and Fall (64%).
- The demographic profile of respondents shown on page 25 of the Snowmobiler Research Report reveals a group of respondents with a good spread of years living in Maine. In addition, there is good representation of second home ownership in Maine, all age groups except 18 to 24, and gender. Not surprisingly, the sample is skewed towards membership in the Maine Snowmobile Association (66%) and people with their primary residence located in Maine (88%). Both of these facts are not surprising and do not undermine the sample as being comprised of people willing to tolerate wind turbines.

Dr. Palmer questioned the utility of the snowmobile survey as a tool to assess user expectations relevant to the decision making process. As described in our response, the Stetson Snowmobiler Survey produced results consistent with other studies related to wind power development and offers another data point for purposes of comparison, as snowmobiling is a type of recreation use that has not been included in previous user intercept surveys that have focused primarily on hiking or shore-based water activities. When independent surveys show consistency, one can typically place greater confidence in the reliability of the results. Please see the table at the end of this document.

### **C. Comparison of Results from Several Independent Studies in Maine**

As noted in our response to comments, in an effort to further corroborate the Bowers Wind Project survey results, Portland Research Group reviewed the results of seven wind development-related public opinion projects conducted independently of each other in 2010 and 2011. The results documented consistency across three important metrics: impact of wind energy facilities on enjoyment, likelihood of returning to area if a wind facility is seen, and disposition toward commercial-scale wind energy development in Maine.

Across each of the studies, the majority of respondents was either, in the positive/support or neutral/no change ranges. A higher percentage of respondents from the Stetson Snowmobiler Study than the Bowers Outdoor Users Activities Study and Highland Hikers Study indicated an expectation of seeing wind farm facilities within the region addressed in the survey. This is not surprising since the snowmobilers were surveyed at the Stetson wind facility. (Please refer to Table 1 at the end of this document).

Since the results from the two studies referenced in the Bowers Wind Project Visual Assessment corroborate with results from other independent studies, one can feel much more confident that the views shared are representative.

Date: June 17, 2011

Bruce M. Lockwood  
Bruce M. Lockwood

STATE OF Maine  
County of Cumberland

Date: June 17, 2011

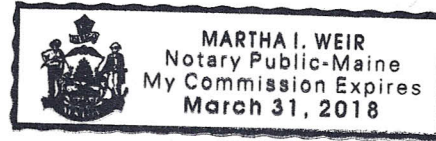
Personally appeared before me the above named Bruce M. Lockwood, who, being duly sworn, did testify that the foregoing testimony was true and correct to the best of his knowledge and belief.

Before me,

Martha J. Weir

Notary Public

My commission expires: \_\_\_\_\_



Lockwood Pre-Filed Rebuttal Testimony Exhibits

- Exhibit A: Lockwood Resume
- Exhibit B: Telephone Research Report
- Exhibit C: Snowmobiler Report
- Exhibit D: May, 2011 Response to Palmer Review Comments
- Exhibit E: Comparison Chart of Independent User Survey Results





**Bruce M. Lockwood**

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### **Portland Research Group, Inc.**

***President, Owner, Founder (2000-present)***

Celebrating its tenth anniversary, Portland Research Group is one of Northern New England's leading full-service Market Research Consulting Firms. The company conducts local, national and international studies. Current clients include, among others, IBM Corporation (approved vendor), L.L. Bean, Philips Lifeline, Wright Express, Mercy Hospital, Unum, Vermont Department of Tourism Marketing, along with numerous local and national for profit and non-profit private and public organizations.

Portland Research Group is a Corporate Partner of the Portland Symphony Orchestra (PSO) and Friends of the Kotschmar Organ (FOKO). Portland Research Group was awarded the first annual PSO Corporate Partnership Award.

Member of Portland Regional Chamber of Commerce, Androscoggin County Chamber of Commerce, and the Market Research Association (MRA).

### **IDEXX Laboratories, Inc.**

***Market Research Manager (1997-2000)***

Located in Westbrook, Maine, IDEXX is the world's largest animal health diagnostic corporation. Refined and formalized market research into a critical strategic decision making tool. Introduced and built the foundation for developing a Customer Relationship Management system to integrate with market research and create powerful customer insight and knowledge. Conducted qualitative and quantitative research worldwide.

### **Market Decisions, Inc.**

***Director of Market Research, Partner (1994-1997)***

At the time, Maine's leading full service market research firm. Managed a broad range of qualitative and quantitative market research studies. Clients included: People's Heritage Bank, Central Maine Power, Bose Corporation, Microsoft, DECD, and FAME, among others. Conducted preliminary research for the NextGen College Investment Program.

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**Bronner Slosberg Humphrey (now Digitas)**

***Market Research Manager (1993-1994)***

***Senior Market Research Analyst (1992-1993)***

Conceptualized, designed and managed market research solutions (qualitative and quantitative) for one of the world's largest direct marketing advertising agencies with over \$400 million in billings at the time. Raised agency awareness and usage of state of the art market research techniques. Clients included: AT&T, American Express, L.L. Bean and Quaker Oats.

**BayBank, Inc. (now Bank of America)**

***Market Research Officer (1989-1992)***

Leading regional retail bank in the Boston area with a 45% primary household bank share. One of the premier financial services marketing firms and the first bank in New England to commit fully to ATMs. Designed and managed consumer research projects including Customer Satisfaction, Market Segmentation, and New Product Development. Member of task force challenged to develop BayBank's marketing database.

**Abt Associates, Inc.**

***Market Research Analyst (1988-1989)***

***Survey Director (1987-1988)***

Very well respected social policy research firm and think tank located in Cambridge, Massachusetts. Managed data collection efforts for market research projects. Primary clients included: BayBank, Blue Cross and Blue Shield plans, John Hancock Insurance, State Street Bank & Trust, and Digital Equipment Corporation.

**Temple, Barker & Sloane, Inc. (now Mercer Management)**

***Market Research Assistant (1986-1987)***

***Programmer/Analyst (1984-1986)***

Managed quantitative market research projects such as Product Development, Market Segmentation, Awareness Testing, and Image. Programmed specialized computer applications. Major clients included: BayBank, Digital Equipment Corporation, Texas Instruments, and Maryland National Bank.

## **Education**

### ***Babson College, Olin Graduate School of Business***

Masters of Business Administration with a concentration in Market Research and Statistical Analysis (1992). Worked for Marks & Spencer as part of the International Management Internship Program.

### ***Boston College, Carroll School of Management***

Bachelor of Science with a concentration in Operations Research (1983)  
Received Dean's Letter of Commendation.

## **Community Involvement**

- Friends of the Kotschmar Organ (FOKO) – President of the Board
- Portland Symphony Orchestra – Member of the Marketing Committee
- Babson College – President's Society, Alumni Evaluator for the Douglas Foundation Business Plan Competition
- Appalachian Trail Conservancy (1983 Appalachian Trail Thru-Hiker – end-to-end)
- Appalachian Mountain Club
- Portland Trails
- Cape Elizabeth Land Trust
- Portland Museum of Art
- Maine Historical Society
- Cape Elizabeth School Volunteer
- First Congregational Church, U.C.C., South Portland – Member Meetinghouse Choir, Hymnal Selection Committee



# Bowers Mountain Wind Project Outdoor Activities Users Research *Telephone Survey*



Portland  
Research  
Group

Portland Research Group  
Portland, Maine  
January 2011

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Appendix A: Additional Data

Appendix B: Questionnaire

# Objectives

This study focuses on the region encompassing and including scenic lakes with visibility within 8 miles of the Bowers Wind Project. Throughout this report, this region is referred to as the “Study Area.”

The primary objectives of this study are to:

- Determine how the lakes and land within the Study Area, and elsewhere in Maine are used.
  - Measure awareness of the Study Area..
  - Frequency of usage.
- Understand expectations for views in the Study Area.
  - Explore the extent to which people expect to see “human-made” structures when using the Study Area.
  - Determine the impact of such structures on people’s enjoyment and likelihood of returning to the Study Area.
- Assess whether and how commercial wind power projects fit within expectations of viewers using the Study Area and other parts of Maine for outdoor activities.
  - Measure respondents’ knowledge and commitment toward wind energy projects.

# Methodology

<p><b>Respondent Criteria</b></p>	<ul style="list-style-type: none"> <li>• Respondents are from New England (22 of 191 respondents live within 50 miles of the study area) and have participated in ATV riding, birding, boating (motor), camping, canoeing or kayaking, fishing, foraging for wild plants or mushrooms, hiking or walking, hunting, cross-country skiing, snowmobiling or snowshoeing in Maine during the last three years.</li> </ul>
<p><b>Respondent Counts</b></p>	<ul style="list-style-type: none"> <li>• n=160 Unaware/ rarely use the Study Area.</li> <li>• n=31 Use the Study Area at least somewhat frequently.</li> </ul>
<p><b>Data Collection</b></p>	<ul style="list-style-type: none"> <li>• January 10 - 18, 2011             <ul style="list-style-type: none"> <li>– Telephone Survey – random sample of New England and then booster sample of households within 50 miles of Study Area.</li> </ul> </li> </ul>
<p><b>Research Caveat</b></p>	<ul style="list-style-type: none"> <li>• This report provides many useful insights with reasonable sample sizes. However, some results should be used directionally due to sample sizes less than 50.</li> </ul>
<p><b>Questionnaire</b></p>	<ul style="list-style-type: none"> <li>• Structured telephone survey instrument containing 35 questions (97 variables).</li> <li>• Questions addressed frequency and location of outdoor activities; logistics of and reasons for using the Study Area for outdoor activities; expectations for views and effects of specific human-made developments/ alterations on overall enjoyment and likelihood of returning to the Study Area; wind turbine sightings within Maine and elsewhere; and position on commercial-scale wind energy developments in Maine. (The full questionnaire can be found in Appendix B to this report.)</li> </ul>

# Methodology: Sample Segments

- A random sample size of n=191 yields a maximum sampling error of +/- 7.1 percentage points at the 95% level of confidence. That is, if the reported percentage is 50%, one can be 95% confident that the percentage for the entire population would be within the range of 42.9% and 57.1%. The sample tolerances for smaller subgroups are broader: n=31, +/- 17.6 percentage points.

	<u>Sample Size</u>
<b>Total</b>	n=191
<b>Use the Study Area**</b>	
Yes	n=31*
No	n=160
<b>Net Residence</b>	
Maine	n=124
Not Maine	n=67
<b>Days Participating in Outdoor Activities</b>	
Less than 40	n=93
40 or more	n=92
<b>Disposition to Wind Energy</b>	
Support (8-10)	n=99
Neutral (4-7)	n=55
Do not support (1-3)	n=25*
<b>Age</b>	
18-54	n=67
55 or older	n=124

	<u>Sample Size</u>
<b>Gender</b>	
Male	n=110
Female	n=81
<b>Seen Wind Turbines</b>	
Have seen	n=168
Have not seen	n=20*
<b>Outdoor Organization Membership</b>	
One or more	n=69
None	n=122

\*Caution, small base (n<50); use for directional purposes only

\*\*On a ten-point scale where 1 means, "Never" and 10 means "Regularly," respondents who use the Study Area gave a rating of 4-10 for at least one of eight lakes included in the research.



# Key Findings

- Respondents participate in a variety of outdoor activities, with hiking (52%), fishing (33%) and canoeing or kayaking (26%) as the top three.
- More than one-half (54%) of respondents report spending 100 days or more in Maine, while one-third (31%) spend fewer than 20 days in the state.
- Two-fifths of respondents (42%) spend between 0 and 19 days of the year participating in outdoor activities in Maine.
  - A significantly higher percentage of those who use the Study Area (39%; 12 of 31\*) than those who do not (19%) reported spending 100 days or more participating in outdoor activities in the state.
- More than one-third of respondents (37%) are not aware of the Study Area.
  - Out of all the individuals asked, only five percent (31 of 580†) use at least one of the eight lakes mentioned from the Study Area more than just rarely.
- One-tenth (10%; 3 of 31\*) consider it likely to see energy facilities such as wind farms in the Study Area. Three-fifths (61%; 19 of 31\*) considered this unlikely.
- One-sixth (16%; 5 of 31\*) indicated that seeing a wind farm would have a positive effect on their overall enjoyment of the region. One-half (48%; 15 of 31\*) reported that this would have a negative effect on their overall enjoyment.

\*Caution, small base (n<50); use for directional purposes only

† This includes 191 individuals who completed the survey, as well as 360 who exceeded the quota for those who do not use the Study Area and 29 who terminated the interview after Q7.

## Key Findings (cont'd.)

- One-quarter (23%; 7 of 31\*) indicated that seeing a wind farm would make them more likely to return to the region for outdoor activities in the future. One-third (32%; 10 of 31\*) reported that this would make them less likely to return to the region.
- Respondents who have seen wind turbines in Maine (48%) and those who have not (48%) are evenly divided. However, two-thirds (70%) of respondents have seen wind turbines outside of the state.
  - Those who use the Study Area (94%; 29 of 31\*) are significantly more likely than those who do not (39%) to have seen wind turbines in Maine.
- Respondents cited a variety of locations within Maine where wind turbines had been seen. However, some of these locations have no operational or proposed wind projects.
  - Those who use the Study Area were significantly more likely than those who do not to have seen wind turbines in Mars Hill, ME (23%; 7 of 30\* vs. 9%) and Lincoln, ME (13%; 4 of 30\* vs. 0%).
  - A significantly higher percentage of those who do not support wind energy development in Maine (5%; 1 of 21\*) and those who are neutral (6%) compared to those who support it (0%) mentioned seeing wind turbines in Lincoln, ME.

\*Caution, small base (n<50); use for directional purposes only

# Detailed Findings

# Overall Awareness and Usage of the Study Area

- More than one-third of respondents (37%) are *not aware* of any of the lakes mentioned located in the Study Area.
  - More than one-quarter (30%) of Maine residents and one-half (51%) of non-residents are *not aware* of any of the lakes.
- Out of all the individuals contacted, only five percent (31 of 580†) use any of the lakes mentioned from the Study Area more than rarely.
  - One-quarter (23%) of Maine residents use the Study Area, compared to three percent of non-residents.
  - Most respondents use the Study Area (90%; 28 of 31\*) are Maine residents.

\*Caution, small base (n<50); use for directional purposes only

† This includes 191 individuals who completed the survey, as well as 360 who exceeded the quota for those who do not use the Study Area and 29 who terminated the interview after Q7.

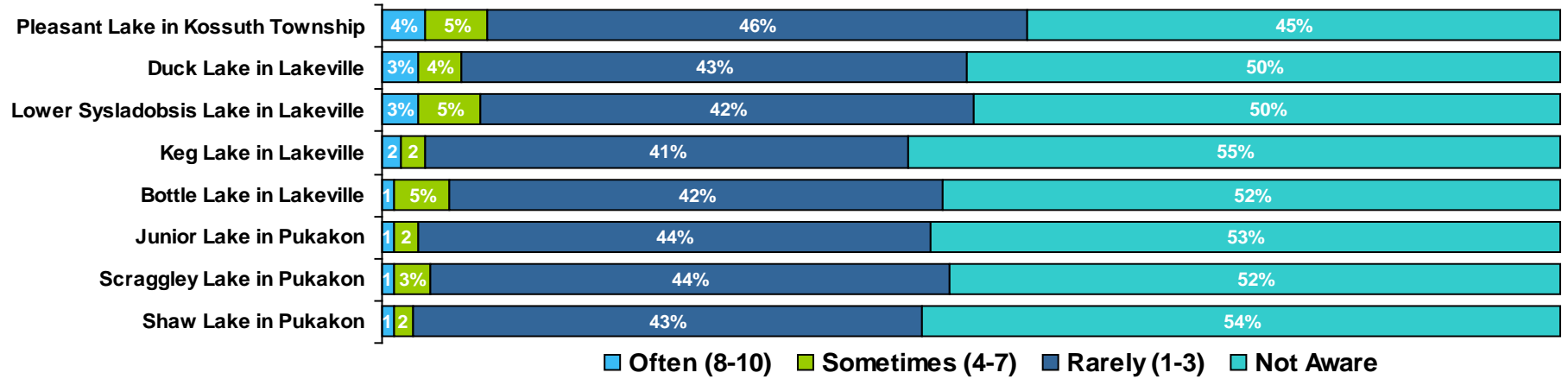
➤ Q7. I am going to read you a list of lakes located in Maine approximately 75 miles northeast of Bangor, Maine just south of the Springfield area off Route 6. You may have heard of lakes with the same or similar names in other parts of Maine. All of the lakes I am going to mention are located in either Washington or Penobscot counties. For each lake please indicate how often you participate in the outdoor activities you mentioned earlier, <<QUALIFYING ACTIVITIES IN QD>>, either on or beside the lake. Please use a ten-point scale where 1 means, "Never" and 10 means "Regularly" to indicate your response. If you are not aware of the lake I mention, please say so.

# Frequency of Outdoor Activity Participation in the Study Area

- Fewer than ten percent of respondents indicated they participated in outdoor activities often (8-10) or sometimes (4-7) either on or beside any one of the lakes in the Study Area.

Frequency of Outdoor Activity Participation in the Study Area

Base: All Respondents (n=191)



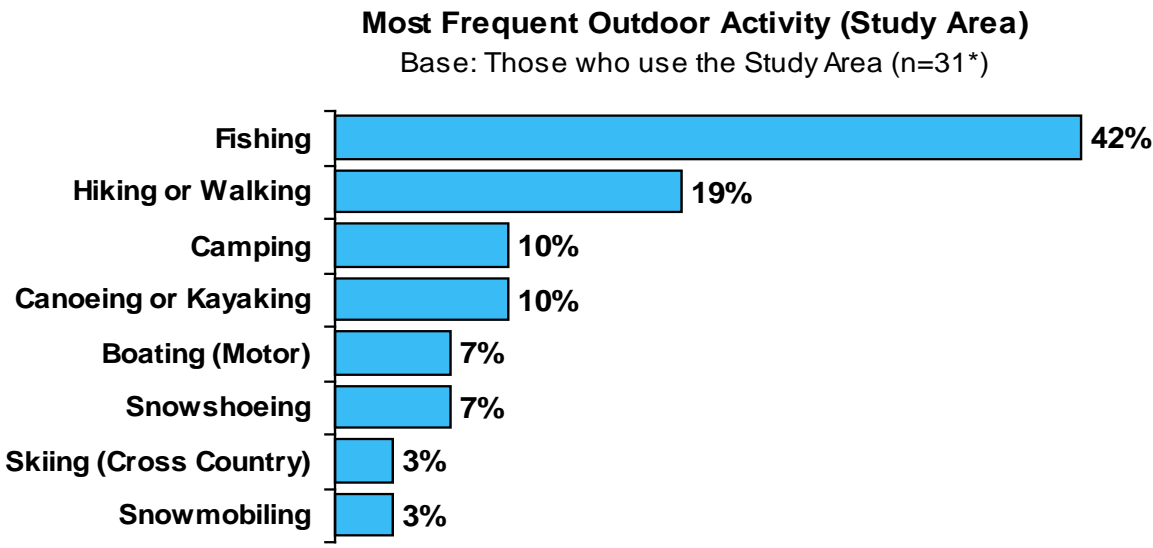
\*Caution, small base (n<50); use for directional purposes only

➤ Q7. I am going to read you a list of lakes located in Maine approximately 75 miles northeast of Bangor, Maine just south of the Springfield area off Route 6. You may have heard of lakes with the same or similar names in other parts of Maine. All of the lakes I am going to mention are located in either Washington or Penobscot counties. For each lake please indicate how often you participate in the outdoor activities you mentioned earlier, <<QUALIFYING ACTIVITIES IN QD>>, either on or beside the lake. Please use a ten-point scale where 1 means, "Never" and 10 means "Regularly" to indicate your response. If you are not aware of the lake I mention, please say so.



# Most Common Outdoor Activities in the Study Area

- Two-fifths (42%; 13 of 31\*) of those who use the Study Area reported fishing as the outdoor activity they most frequently participate in the region, followed distantly by hiking (19%; 6 of 31\*), camping (10%; 3 of 31\*) and canoeing or kayaking (10%; 3 of 31\*).

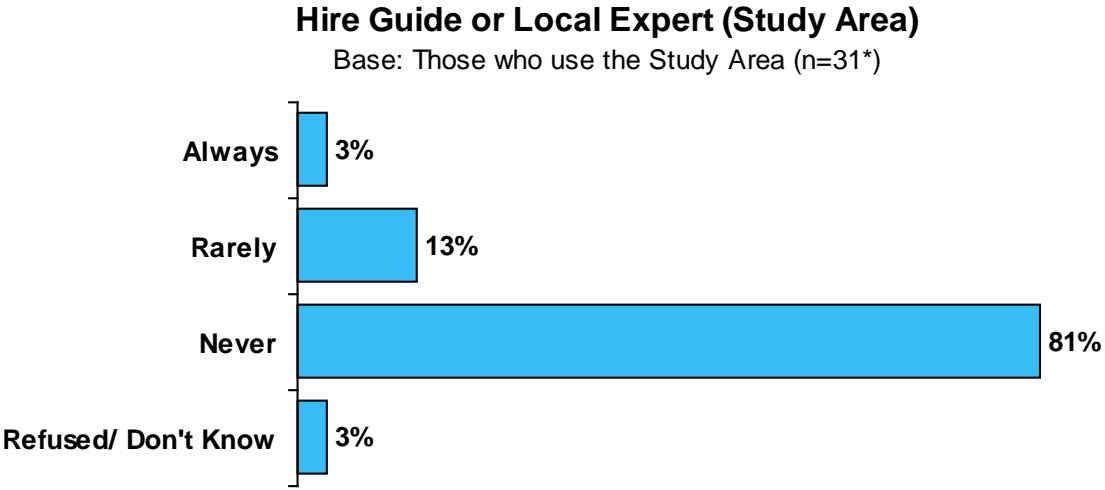


\*Caution, small base (n<50); use for directional purposes only

> Q8. Which of the outdoor activities you mentioned earlier, <<QUALIFYING ACTIVITIES IN QD>>, do you participate in most frequently on or beside one of the lakes I just mentioned? (Unaided, multiple response)

# Hire Guide or Local Expert

- Four-fifths (81%; 25 of 31\*) of those who use the Study Area never hire a guide or local expert.
- One-eighth of respondents (13%; 4 of 31\*) indicated that they rarely hire a guide or local expert. One respondent (3%; 1 of 31\*) always hires a guide.

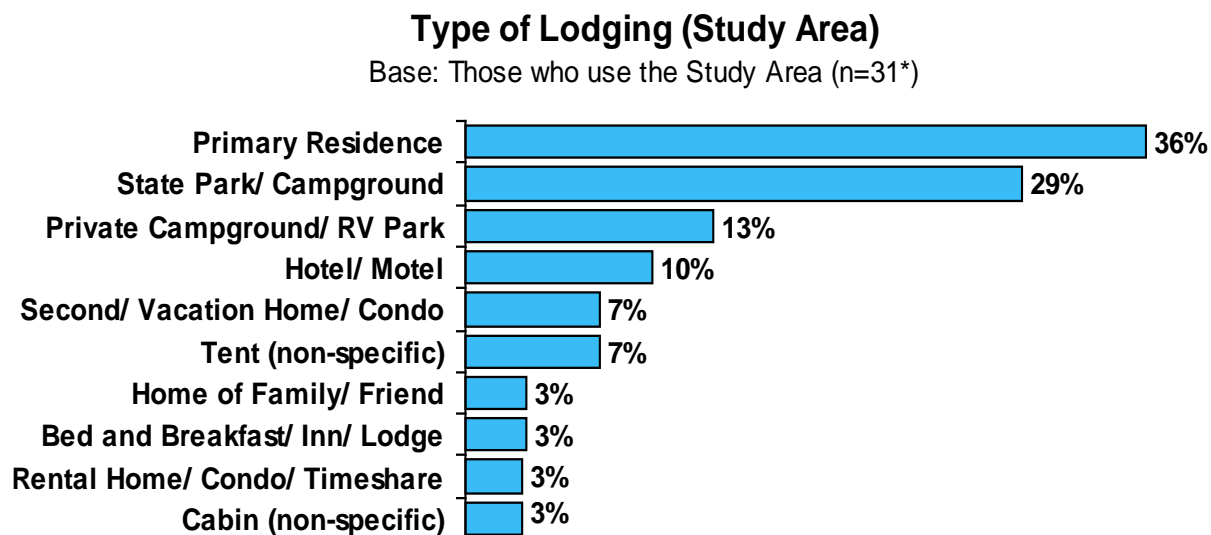


\*Caution, small base (n<50); use for directional purposes only

> Q9. The next group of questions will refer to your experiences <<RESPONSE IN Q8>> on or beside one of the lakes I just mentioned. When you participate in this outdoor activity on or beside those lakes, how often do you use guides or hire local experts? Would you say... (Aided, single response)

# Type of Lodging

- More than one-third (36%; 11 of 31\*) of those who use the Study Area stay the night at their primary residence when they participate in outdoor activities in the region.
- Less than one-third (29%; 9 of 31\*) stay the night at a state park or campground when participating in outdoor activities in the Study Area.



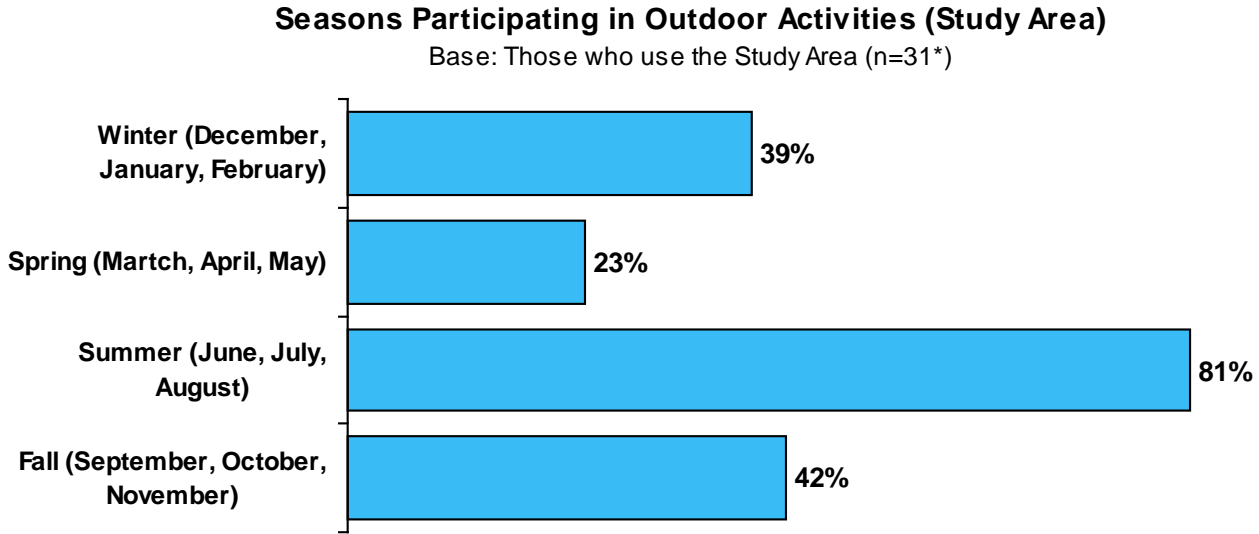
\*Caution, small base (n<50); use for directional purposes only

> Q10. At what types of lodging do you typically spend the night when <<RESPONSE IN Q8>> on or beside one of the lakes I just mentioned? (Unaided, multiple response)



# Seasons Participating in Outdoor Activities

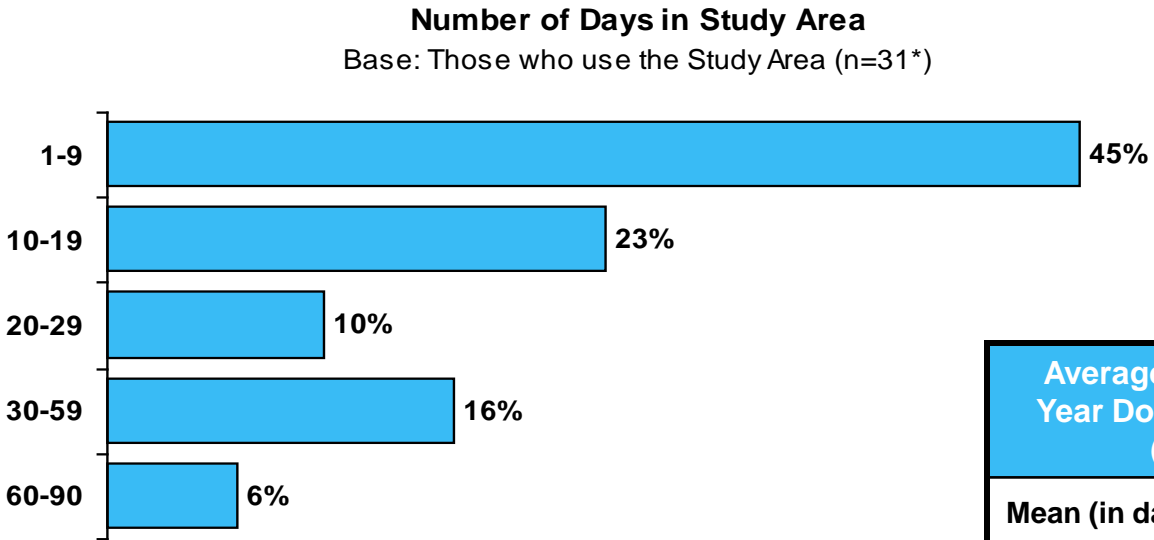
- Four-fifths (81%; 25 of 31\*) of those who use the Study Area do so during the summer.
- Two-fifths each reported using the Study Area in the fall (42%; 13 of 31\*) and winter (39%; 12 of 31\*).
- One-quarter use the area in the spring (23%; 7 of 31\*).



\*Caution, small base (n<50); use for directional purposes only  
> Q11. In what seasons are you typically <<RESPONSE IN Q8>> on or beside one of these lakes? (Aided, multiple response)

# Number of Days in the Study Area

- More than two-fifths who use the Study Area (45%; 14 of 31\*) report spending on average 1 to 9 days of the year participating in outdoor activities in the area.
- One-quarter (23%; 2 of 31\*) report spending an average of 10 to 19 days participating in outdoor activities in the region.
- Overall, users as a group spend an average of 18.7 days per year participating in outdoor activities in the Study Area, although the median is just 10 days.



Average Number of Days per Year Doing Outdoor Activities (All Locations)	
Mean (in days)	18.7
Median (in days)	10

\*Caution, small base (n<50); use for directional purposes only

> Q12. On average, about how many days a year do you spend <<RESPONSE IN Q8>>, on or beside one of these lakes? (Unaided, single response)

# Reasons for Outdoor Activity in the Study Area

- Respondents use the Study Area for a variety of reasons, which include fishing (45%; 14 of 31\*), the beautiful scenery and views (36%; 11 of 31\*), and enjoyment (26%; 8 of 31\*).
- One-fifth of respondents identified “fishing” (19%; 6 of 31\*) as the primary reason for using the area, followed closely by “enjoyment” (16%; 5 of 31\*).

Top Three Reasons – Study Area** Base: Those who use the Study Area (n=31*)		Number One Reason – Study Area** Base: Those who use the Study Area (n=31*)	
Fishing	45%	Fishing	19%
Beautiful scenery/ View	36%	Enjoyment	16%
Enjoyment	26%	Socialization/ Friends/ Family	10%
Not crowded/ Remote	19%	Exercise	10%
Socialization/ Friends/ Family	16%	Beautiful scenery/ View	10%
Exercise	13%	Familiarity	7%
Water	10%	Not crowded/ Remote	7%
Close proximity	10%	Water	3%
Camp	10%	Close proximity	3%

\*Caution, small base (n<50); use for directional purposes only

\*\*Please see Appendix A for additional detail.

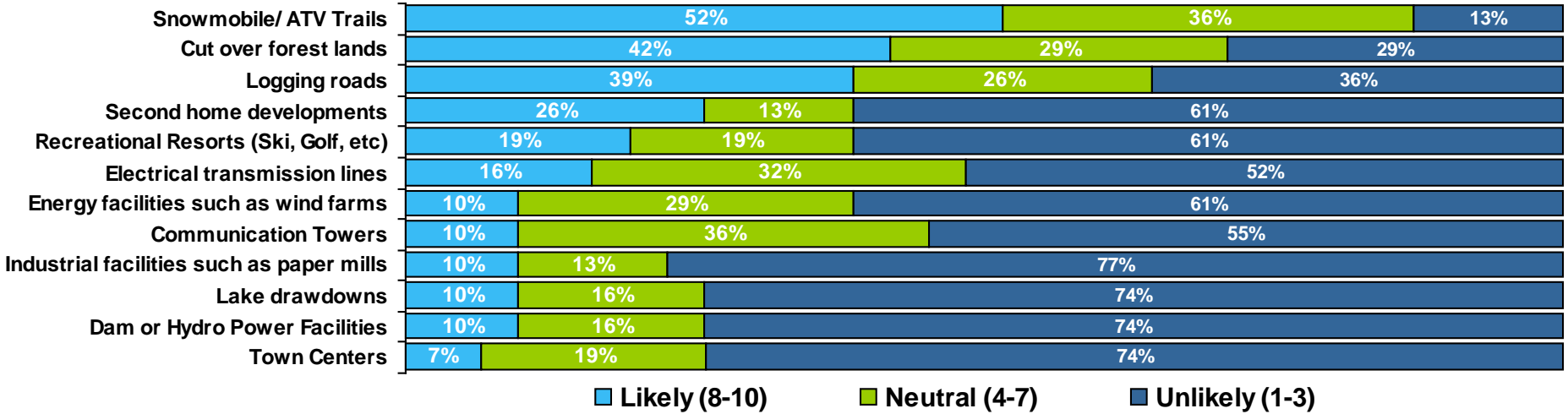
➤ Q13. What would you say are the top three reasons for <<RESPONSE IN Q8>>, specifically on or beside one of these lakes? (Unaided, multiple response)

➤ Q14. What one of those reasons would you say is your primary reason for <<RESPONSE IN Q8>>, specifically on or beside one of these lakes? (Unaided, single response)

# Expectations During Outdoor Activity

- One-half of respondents (52%; 16 of 31\*) consider it likely to see snowmobile or ATV trails, followed by cut over forest lands (42%; 13 of 31\*) and logging roads (39%; 12 of 31\*) on or near one of the lakes in the region.
- Three-quarters (77%; 24 of 31\*) consider it unlikely to see industrial facilities such as paper mills.
- One-tenth (10%; 3 of 31\*) of respondents consider the possibility of seeing energy facilities such as wind farms likely; more than one-half (61%; 19 of 31\*) believe it is unlikely.

**Likelihood of Seeing Visible Development in the Study Area**  
 Base: Those who use the Study Area (n=31\*)



\*Caution, small base (n<50); use for directional purposes only

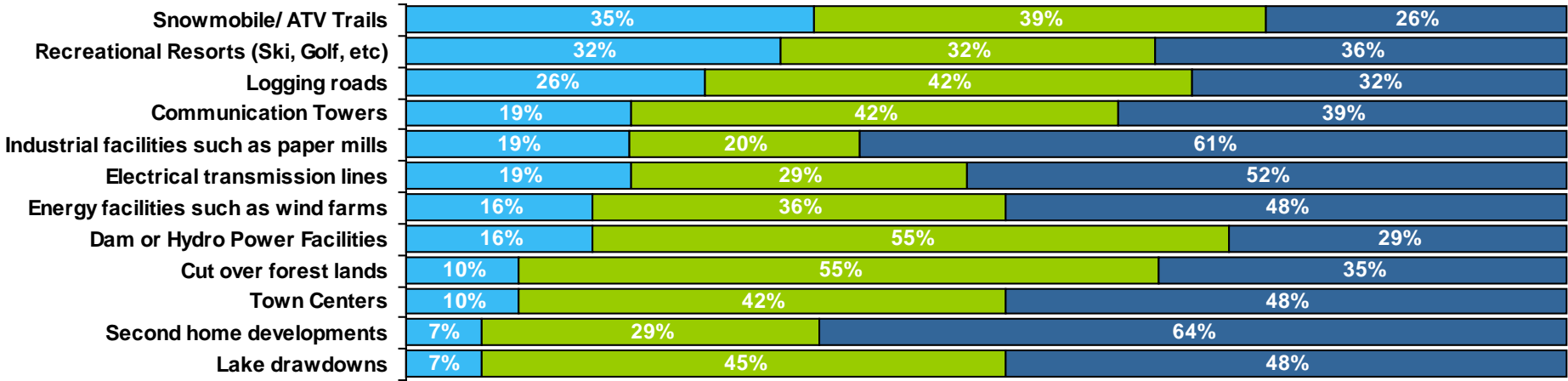
> Q15. How unlikely or likely do you expect to see the following while <<RESPONSE IN Q8>> specifically on or beside one of these lakes? Please use a ten-point scale where 1 means, "Very Unlikely" and 10 means "Very Likely" to indicate your response.

# Effect of Visible Development on Enjoyment

- One-third of respondents (35%; 11 of 31\*) feel that seeing snowmobile or ATV trails would positively affect their enjoyment of the region, followed by recreational resorts (32%; 10 of 31\*) and logging roads (26%; 8 of 31\*).
- Three-fifths feel that seeing second home developments (64%; 20 of 31\*) or industrial facilities such as paper mills (61%; 19 of 31\*) would negatively affect their enjoyment of the region.
- One-sixth (16%; 5 of 31\*) expect that seeing wind farms would positively affect their overall enjoyment of the region; another 36% (11 of 31\*) are neutral and almost one-half (48%; 15 of 31\*) believe this would have a negative impact.

## Impact on Enjoyment

Base: Those who use the Study Area (n=31\*)



■ Positive Effect (8-10)    ■ Neutral (4-7)    ■ Negative Effect (1-3)

\*Caution, small base (n<50); use for directional purposes only

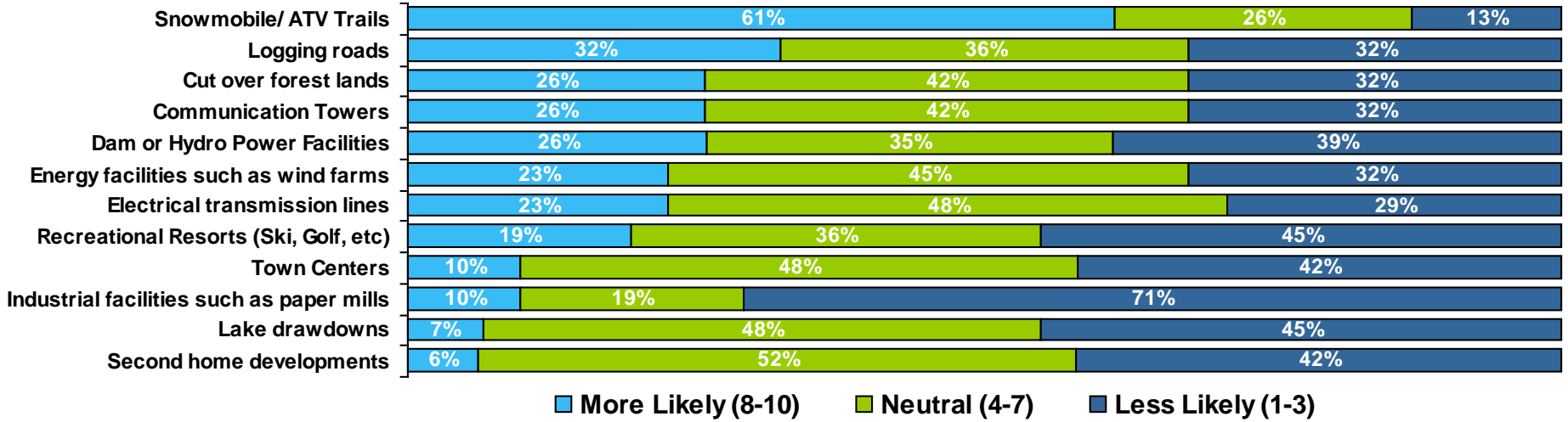
> Q16. Please rate how your overall enjoyment would be affected, if at all, if you saw the following while <<RESPONSE IN Q8>>, specifically on or beside one of these lakes? Please use a ten-point scale where 1 means, "Very Negative Effect" and 10 means "Very Positive Effect" to indicate your response.

# Effect of Visible Development on Likelihood of Returning

- Three-fifths of respondents (61%; 19 of 31\*) indicated that seeing snowmobile or ATV trails would make them more likely to return to the Study Area for their outdoor activities of choice.
- Over two-thirds (71%; 22 of 31\*) indicated that seeing industrial facilities such as paper mills would make them less likely to return to the region.
- One-quarter (23%; 7 of 31\*) reported that seeing wind farms would increase their likelihood of returning to the Study Area; almost one-half (45%; 14 of 31\*) are neutral and one-third (32%; 10 of 31\*) indicated they would be less likely to return.

**Likelihood of Returning to the Study Area for Outdoor Activities**

Base: Those who use the Study Area (n=31\*)



\*Caution, small base (n<50); use for directional purposes only

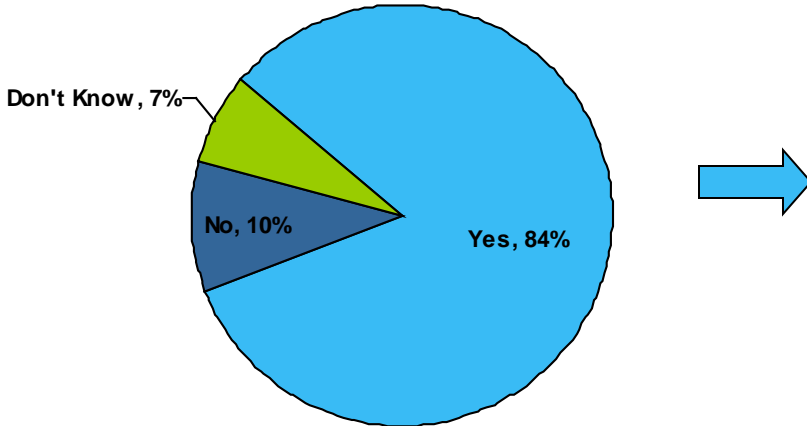
> Q17. Using a ten-point scale where 1 means you are "Much Less Likely" and 10 means you are "Much More Likely", please rate your likelihood of personally returning to these lakes for <<RESPONSE IN Q8>> if you saw the following while <<RESPONSE IN Q8>>, either on or beside one of these lakes.

# Go to Another Maine Location

- Most respondents (84%; 26 of 31\*) indicated that they could go elsewhere in Maine to participate in their outdoor activity of choice.
  - Three-quarters (73%; 11 of 15\*) of respondents for whom seeing wind farms would have a negative impact indicated that they could go elsewhere.
- One-fifths (19%; 5 of 26\*) indicated that they would go somewhere within Penobscot County.
  - Among those for whom seeing wind farms would have a negative impact, one-fifth (18%; 2 of 11\*) each would go to the Western Maine Mountains, elsewhere in Penobscot County or Washington County instead.

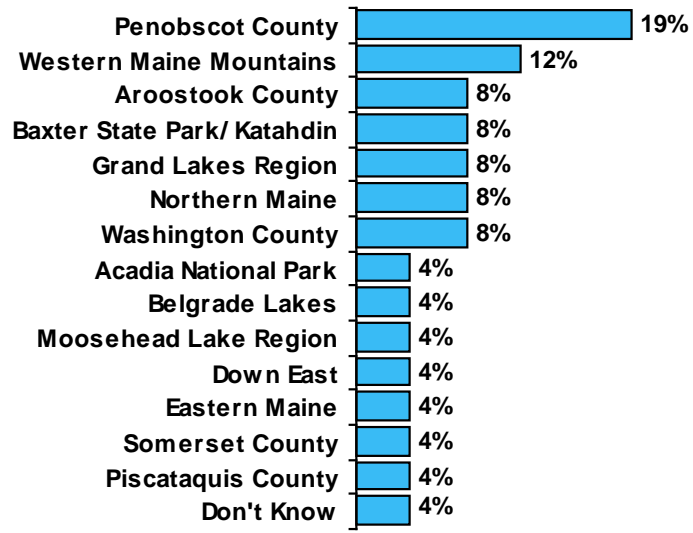
### Go Elsewhere in Maine if Wind Farms Sighted

Base: Those who use the Study Area (n=31\*)



### Alternate Maine Location

Base: Those who use the Study Area and have another Maine location to go to (n=26\*)

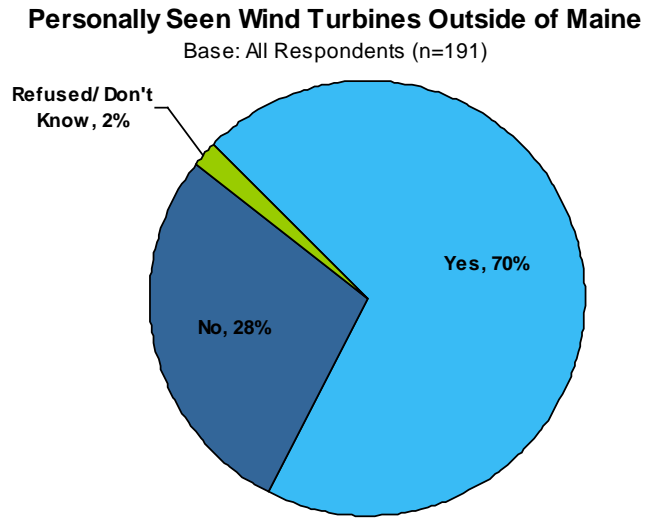
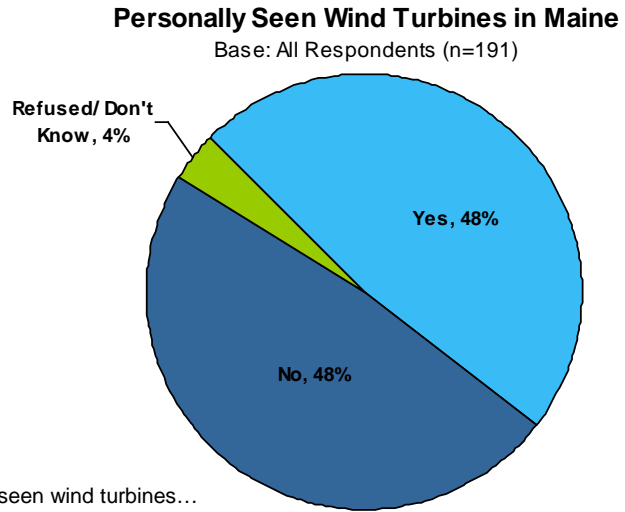


\*Caution, small base (n<50); use for directional purposes only  
 † Chart does not total 100 percent due to rounding.

> Q18. If you went to these lakes for <<RESPONSE IN Q8>> and saw evidence of a project or something else that caused you not to want to return, is there another lake, region or location in Maine you could go to and enjoy the same outdoor activity equally as much or more?  
 > Q19. What region or location in Maine would you go to instead? (Unaided, multiple response)

# Seen Wind Turbines

- Respondents are equally divided between those who have seen wind turbines in Maine (48%) and those who have not (48%).
  - Similar levels of support for wind energy development in Maine among those who have seen wind turbines in the state (46%) and those who have not (52%) suggest that seeing wind turbines in Maine has little influence on disposition toward wind energy development in the state.
  - Those who use the Study Area (94%; 29 of 31\*) are significantly more likely to have seen wind turbines in Maine than those who do not use the area (39%).
- Over two-thirds of respondents (70%) have seen wind turbines outside of Maine.
  - A significantly higher percentage of respondents who belong to one or more outdoor organizations (81%) than those who do not belong to any report having seen turbines outside of Maine (63%).



➤ Q20. Have you personally seen wind turbines...  
a. In Maine  
b. Outside of Maine



# Seen Wind Turbines (cont'd.)

- One-fifth of respondents (20%) mentioned seeing wind turbines in Massachusetts.
- Respondents mentioned seeing turbines in a variety of locations within the state, some of which have no extant or planned wind projects.
- The most commonly mentioned locations within the state were Mars Hill (11%), Vinalhaven (5%) and Lincoln (2%).
  - Study Area users were significantly more likely to mention seeing turbines in Mars Hill (23%; 7 of 30\*) and Lincoln, ME (13%; 4 of 30\*) than those who do not use the region (9% and 0%, respectively). These sites were the most commonly mentioned by those who use the area.
  - A significantly higher percentage of those who do not support wind energy development in Maine (5%; 1 of 21\*) and those who are neutral (6%) compared to those who support it (0%) mentioned seeing wind turbines in Lincoln, ME.

<b>Turbine Location**</b>	
Base: Those who have seen wind turbines (net) (n=168)	
<b>Massachusetts</b>	<b>20%</b>
<b>California</b>	<b>14%</b>
<b>Vermont</b>	<b>13%</b>
<b>New York</b>	<b>11%</b>
<b>Mars Hill, ME</b>	<b>11%</b>
<b>New Hampshire</b>	<b>10%</b>
<b>Pennsylvania</b>	<b>6%</b>
<b>Rhode Island</b>	<b>5%</b>
<b>Vinalhaven, ME</b>	<b>5%</b>
<b>Maine (non-specific)</b>	<b>4%</b>
<b>New Jersey</b>	<b>4%</b>
<b>Connecticut</b>	<b>2%</b>
<b>Hawaii</b>	<b>2%</b>
<b>Lincoln, ME</b>	<b>2%</b>

\*Caution, small base (n<50); use for directional purposes only

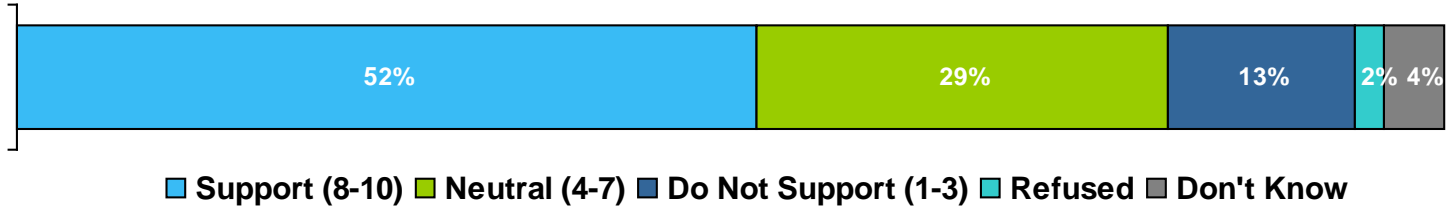
\*\*Please see Appendix A for additional detail.

>Q21. Where have you seen wind turbines? (PROBE ON CITY/TOWN, STATE/PROVINCE, COUNTRY) (Unaided, multiple response)

# Support Wind Energy Development in Maine

- One-half of respondents (52%) support the development of wind energy in Maine.
  - A significantly higher percentage of those who do not use the Study Area (55%) than those who do (36%; 11 of 31\*) support the development of wind energy in Maine.
- One-eighth (13%) of respondents do not support wind energy development in Maine.
- More than a quarter (29%) have a neutral disposition toward wind energy, while four percent do not know if they support wind energy development in Maine.

**Support Wind Energy Development in Maine**  
Base: All Respondents (n=191)

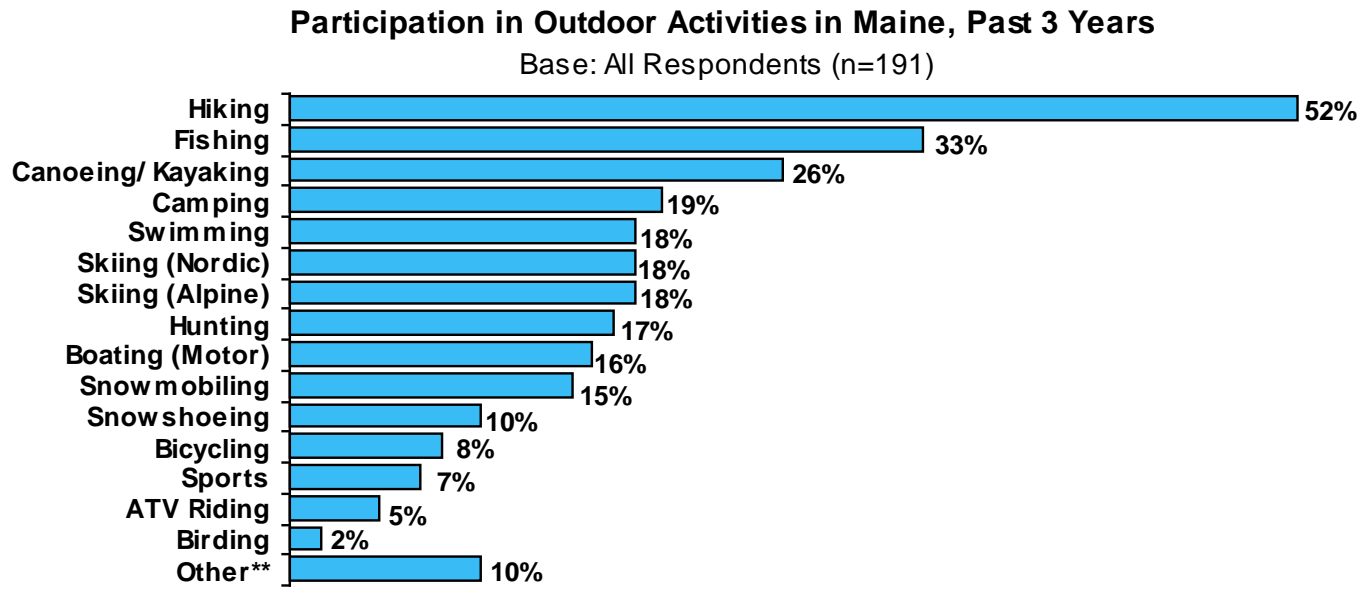


\*Caution, small base (n<50); use for directional purposes only

> Q22. Using a ten-point scale where 1 means "Do Not Support At All" and 10 means "Completely Support", to what extent do you not support or support commercial-scale wind energy development in Maine?

# Outdoor Activities in Maine

- One-half of respondents (52%) hiked in Maine during the last three years, followed by one-third (33%) who fished and one-quarter (26%) who went canoeing or kayaking.
  - A significantly higher percentage of those who use the Study Area (48%; 15 of 31\*) than those who do not (30%) report having fished in Maine during the last three years.
  - Maine residents are significantly more likely than non-residents to fish (43% vs. 15%), cross country ski (24% vs. 6%) and hunt (23% vs. 6%) in Maine.



\*Caution, small base (n<50); use for directional purposes only

\*\*Please see Appendix A for additional detail.

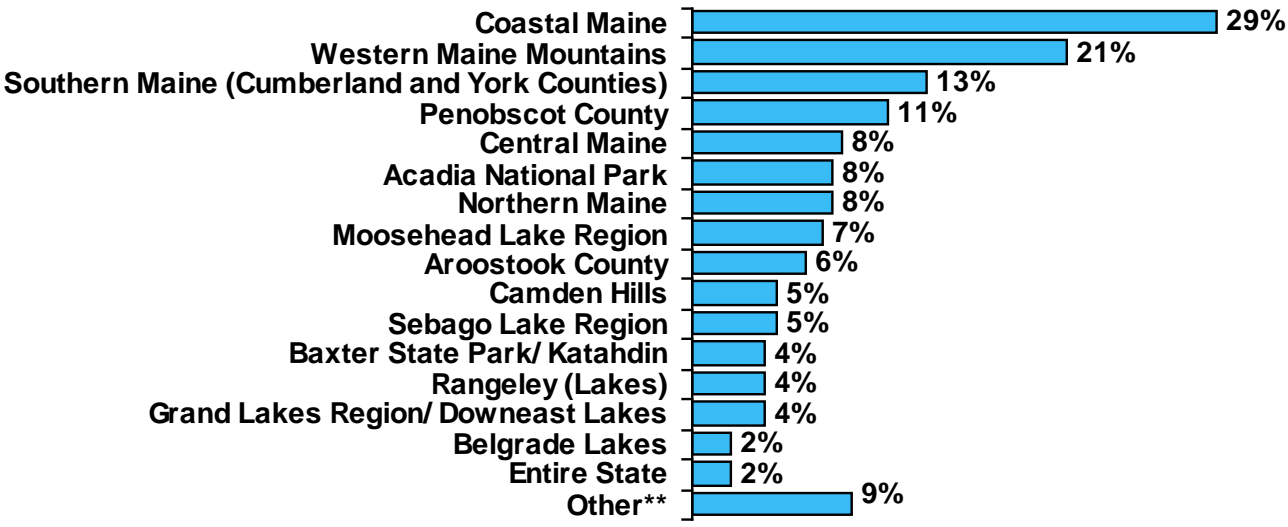
➤ QD. What outdoor activities, if any, have you participated in within the State of Maine during the last three years? (Unaided, multiple response)

# Maine Regions for Outdoor Activities

- More than one-quarter (29%) of respondents have participated in outdoor activities in the coastal Maine area, followed by the Western Maine mountains (21%) and Southern Maine (13%).
  - Non-residents (52%) are significantly more likely to use the Maine coast for outdoor activities than Maine residents (17%), as are those who participate in outdoor activities less than 40 days per year (36%) rather than 40 or more days (22%).

**Regions for Activities in Maine, Past 3 Years**

Base: All Respondents (n=191)

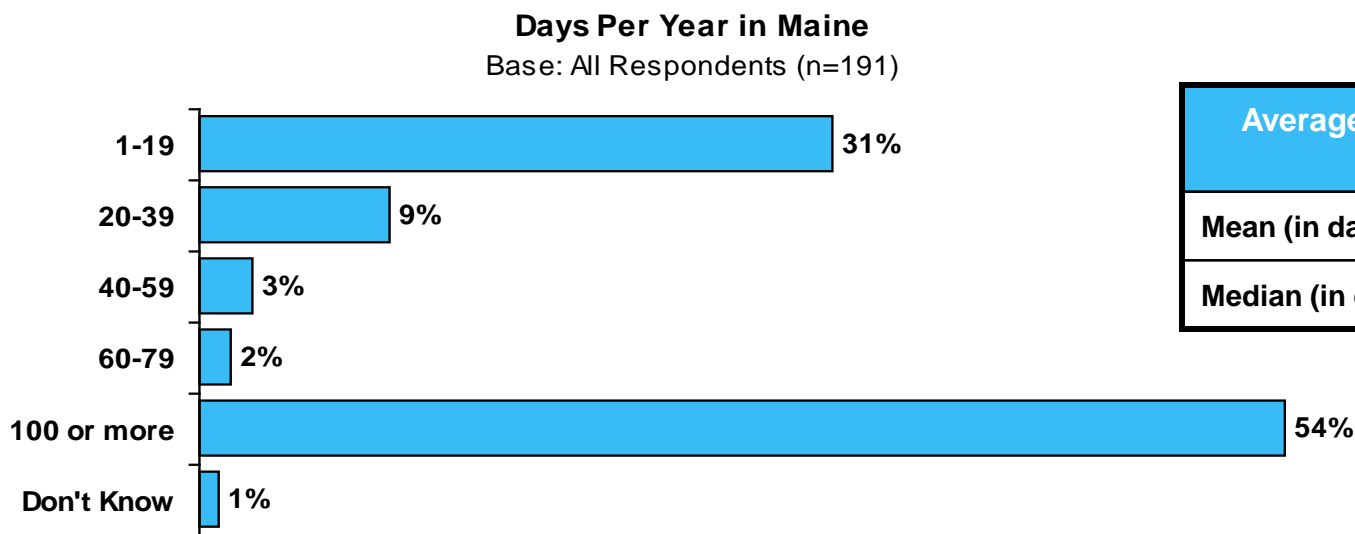


\*\*Please see Appendix A for additional detail.

> QE. In what regions of Maine have you participated in <<QUALIFYING ACTIVITIES IN QD>> during the last three years? (Unaided, multiple response)

# Number of Days Spent in Maine

- With three of five respondents reporting primary residence in Maine, it is not surprising that more than one-half of respondents (54%) spend an average of 100 days or more in Maine each year.
  - Those who use the Study Area are significantly more likely to be residents of Maine than not (90%; 25 of 31\* vs. 52%) and spend 100 days or more on average in the state each year than those who do not (87%; 27 of 31\* vs. 48%).
- One-third (31%) spend between 1 and 19 days on average in the state each year.



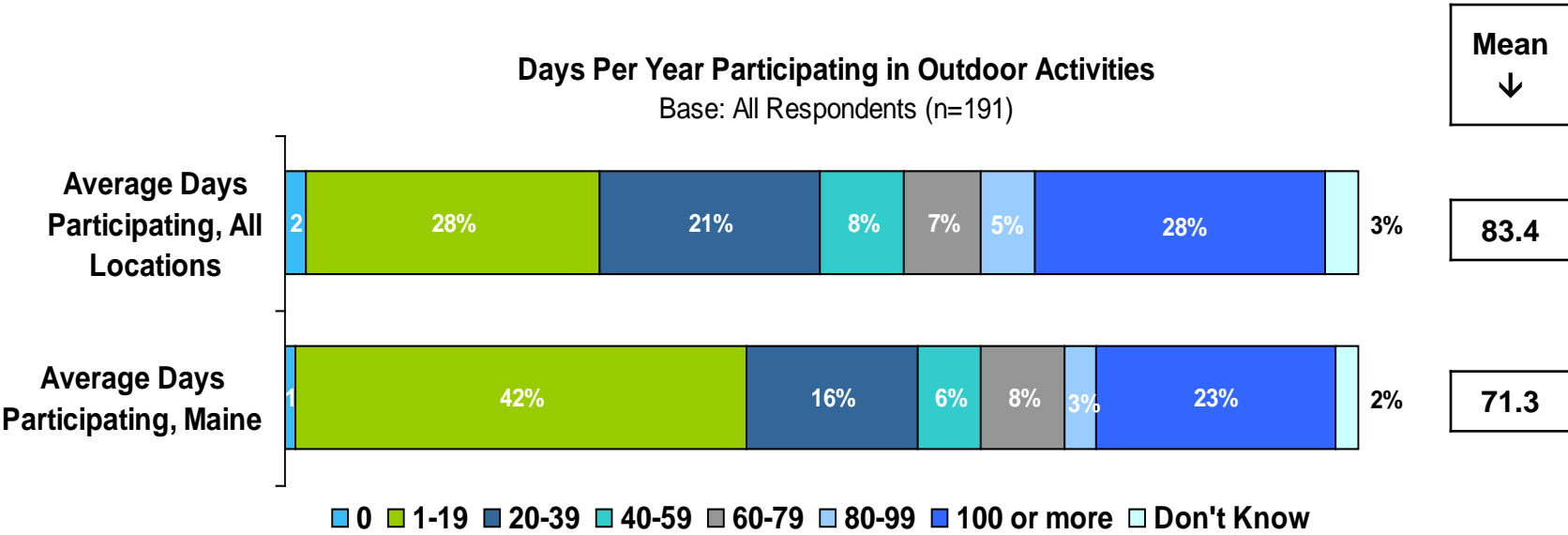
Average Number Days per Year Spent in Maine	
Mean (in days)	196.9
Median (in days)	320

\*Caution, small base (n<50); use for directional purposes only

> Q1. On average, how many days each year do you spend in Maine for any reason? (IF RESPONDENT SAYS, "I live in Maine," TRY TO OBTAIN BEST ESTIMATE BY GETTING RESPONDENT TO THINK ABOUT TRIPS OUTSIDE OF MAINE SUCH AS VACATIONS, BUSINESS TRIPS, DAY TRIPS, ETC.) (Unaided, single response)

# Outdoor Activity Frequency

- More than one-quarter of respondents (28%) reported spending an average of 0-19 days per year participating in outdoor activities, while the same percentage reported spending 100 or more days.
- Two-fifths of respondents (42%) reported spending an average of 0-19 days engaging in outdoor activities in the state of Maine, while just under one-quarter (23%) reported spending 100 or more days in Maine.
  - A significantly higher percentage of those who use the Study Area (39%; 12 of 31\*) reported spending 100 or more days participating in outdoor activities in Maine, compared to those who do not use the area (19%).

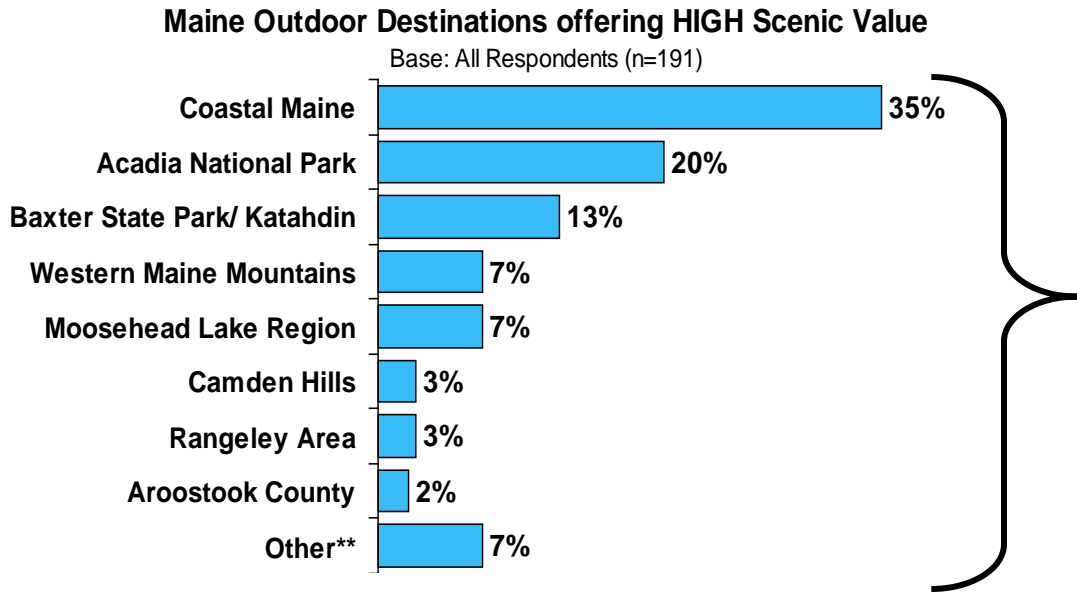


\*Caution, small base (n<50); use for directional purposes only

➤ Q2. On average, about how many days a year do you participate in the following outdoor activities in total at all locations: <<QUALIFYING ACTIVITIES IN QD>>?  
 ➤ Q3. On average, about how many days a year do you participate in the following outdoor activities in total in Maine: <<QUALIFYING ACTIVITIES IN QD>>?

# Scenic Outdoor Destinations in Maine

- One-third of respondents (35%) identified Coastal Maine as an area with high scenic value, followed by Acadia National Park (20%) and Baxter State Park or Katahdin (13%).
  - Baxter State Park or Katahdin was identified by a significantly higher percentage of those who use the Study Area (26%; 8 of 31\*) than those who do not (10%), as well as by Maine residents (16%), as opposed to non-residents (6%).



**Reasons for Selection\*\***  
Base: All Respondents (n=191)

Ocean/ Coast	23%
Mountain(s)	17%
Activities	16%
Vistas/ View	14%
Beautiful	14%
Familiarity	11%
Lake(s)/ Pond(s)	7%
Relaxing/ Peaceful	6%
Nearness of varied surroundings	6%

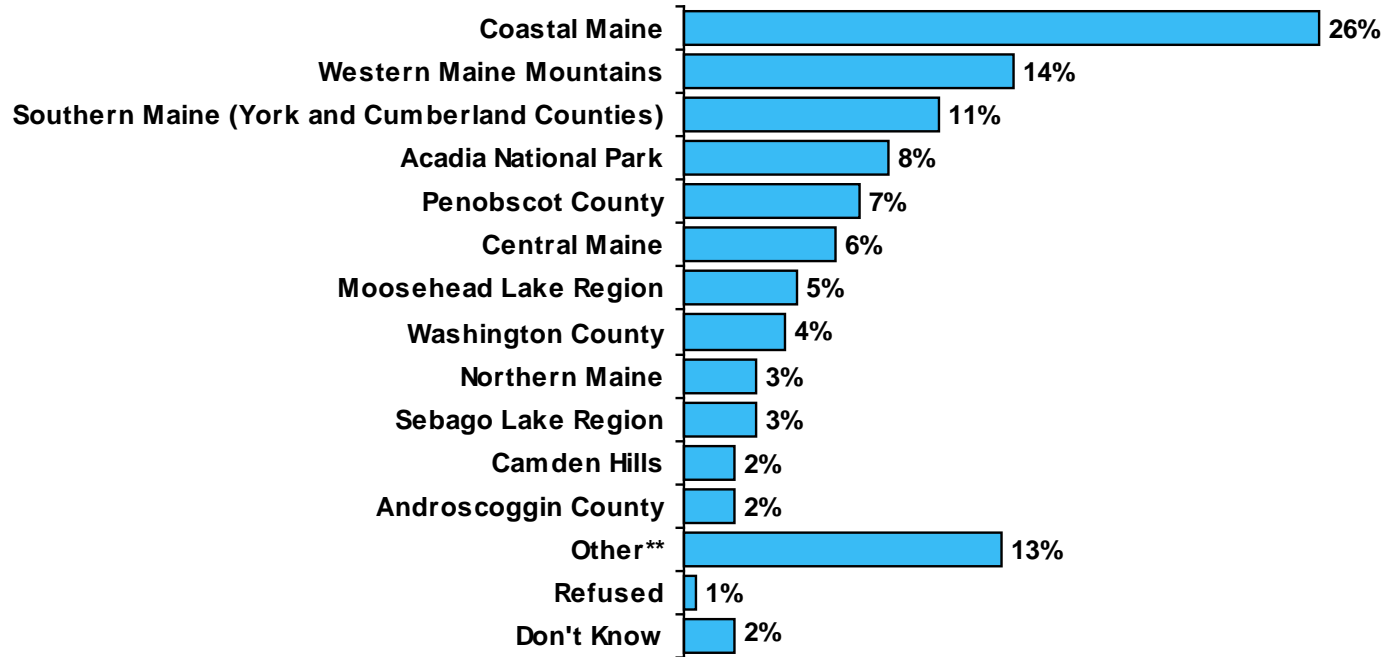
\*\*Please see Appendix A for additional detail.  
 ➤ Q4. Think of a ten-point scale where 1 means "Very Low Scenic Value" and 10 means "Very High Scenic Value". What one outdoor destination in Maine have you visited that you would rate "8 - 10" as having high to very high scenic value? (Unaided, single response)  
 ➤ Q5. Please explain briefly the reasons why you selected the outdoor destination you identified as having very high scenic value. (Unaided, multiple response)

# Maine Region Most Often Visited for Outdoor Activities

- One-quarter (26%) of respondents have most often visited coastal Maine to participate in outdoor activities during the past three years, followed by the Western Maine mountains (14%) and Southern Maine (11%).

**Maine Region Most Often Visited for Outdoor Activities (Past 3 Years)**

Base: All Respondents (n=191)



\*\*Please see Appendix A for additional detail.

> Q6. In what region of Maine would you say you have gone to most often in the last three years to participate in the outdoor activities you mentioned earlier:  
 <<QUALIFYING ACTIVITIES IN QD>>? (Unaided, single response)





# Conclusions

# Conclusions

- Only five percent of all individuals contacted (31 of 580) use at least one of the eight lakes in the Study Area more than just rarely.
  - More than one-third of all respondents (37%) are not aware of the Study Area.
  - Most (82%) individuals contacted whose primary residence is within 50 miles of the Project indicated they were either unfamiliar with, or did not regularly use, lakes in the Study Area.
- Those who use the Study Area, participate in a variety of outdoor activities, including fishing (42%; 13 of 31\*), hiking (19%; 6 of 31\*), canoeing (10%; 3 of 31\*), and camping (10%; 3 of 31\*).
- Four-fifths (81%; 25 of 31\*) of those who use the Study Area never hire a guide or local expert.
- Those who use the Study area have mixed expectations for seeing a wind facility.
  - A negative effect on enjoyment is more likely from second-home developments (64%; 20 of 31\*) or paper mills (61%; 29 of 31\*) than from wind farms (48%; 15 of 31\*).
  - One-quarter (23%; 7 of 31\*) indicated that seeing a wind farm would make them more likely to return to the region for outdoor activities in the future. One-third (32%; 10 of 31\*) reported that this would make them less likely to return to the region.
- One-half of respondents (52%) support wind energy development in Maine.

\*Caution, small base (n<50); use for directional purposes only

# Respondent Profile

# Respondent Profile

- Three-fifths (60%) of respondents do not belong to any outdoor organizations. Respondents are members of a variety of groups, including local conservation organizations, wildlife preservation organizations and local land trusts (6% each).
- Most respondents (90%) are 45 years of age or older, with few people under the age of 35 (1%).
- Three-fifths (58%) of respondents are Maine residents and the average length of residency is 38.9 years.
- One-fifth (20%) of respondents own a second home in Maine. While about one-third of these respondents (34%; 13 of 38\*) gave a zip code more than fifty miles from their primary residence, three-fifths (60%; 23 of 38\*) did not know the zip code for their second home top of mind.
- Among those who do not own a primary or secondary residence in Maine, the average number of years visiting the state is 28.4.

# Demographics

	<b>Total</b>
<b>Outdoor/ Conservation Organizations</b>	<b>(n=191)</b>
Local conservation organizations	6%
Wildlife preservation organizations	6%
Local land trusts	6%
Maine Audubon Society	4%
Sportsman's Alliance of Maine	3%
Appalachian Mountain Club	2%
Trails preservation organizations	2%
Hunting/ Fishing organizations	2%
National Parks Association	2%
Sierra Club	2%
The Nature Conservancy	2%
Other snowmobile associations	2%
NRA	2%
Natural Resources Council of Maine	1%
National conservation organizations	1%
Appalachian Trail Conservancy	<1%
Maine Snowmobile Association	<1%

	<b>Total</b>
<b>Outdoor/ Conservation Organizations (cont'd)</b>	<b>(n=191)</b>
Ski club	<1%
Municipal board	<1%
MOFGA	<1%
Maine Professional Guides Association	<1%
Girl Scouts	<1%
National Public Radio	<1%
None	60%
Refused/ Don't Know	5%
<b>Age</b>	<b>(n=191)</b>
18 to 24	<1%
25 to 34	<1%
35 to 44	9%
45 to 54	25%
55 to 64	35%
65 to 74	18%
75 or older	12%

	<b>Total</b>
<b>Gender</b>	<b>(n=191)</b>
Male	58%
Female	42%
<b>Children Under 18 in Household</b>	<b>(n=191)</b>
Yes	20%
No	80%
<b>Primary Residence Location</b>	<b>(n=191)</b>
In Maine	58%
Outside of Maine	40%
Refused/ Don't Know	2%
<b>Length of Maine Residency (years)</b>	<b>(n=111)</b>
1-12	13%
13-24	15%
25-36	18%
37-49	19%
50-97	35%

# Demographics

	<b>Total</b>
<b>Own Second Home/ Camp in Maine</b>	<b>(n=191)</b>
Yes	20%
No	79%
Refused/ Don't Know	1%
<b>Location of Second Home/ Camp</b>	<b>(n=38*)</b>
Local Maine (less than 50 mi.)	3%
Non-Local Maine (more than 50 mi.)	34%
Refused	3%
Don't Know	60%
<b>Length of Time Owning Second Home in Maine (years)</b>	<b>(n=13*)</b>
1-12	31%
13-24	23%
25-36	16%
37-49	15%
50-97	15%

	<b>Total</b>
<b>Years Visiting Maine (if no primary or secondary home in Maine)</b>	<b>(n=67)</b>
1-12	23%
13-24	13%
25-36	30%
37-49	21%
50-97	13%
<b>Income</b>	<b>(n=191)</b>
Less than \$35,000	13%
\$35,000 to less than \$50,000	11%
\$50,000 to less than \$75,000	17%
\$75,000 to less than \$100,000	13%
\$100,000 to less than \$150,000	15%
\$150,000 to less than \$200,000	7%
\$200,000 or more	2%
Refused/ Don't Know	22%

\*Caution, small base (n<50); use for directional purposes only

# Appendix A: Additional Data

# Appendix A: Additional Data

**QD. What outdoor activities, if any, have you participated in within the State of Maine during the last three years?**

<b>Participation in Outdoor Activities in Maine, Past 3 Years</b>	
<b>Base: All Respondents (n=191)</b>	
<b>Cutting Wood</b>	<b>1%</b>
<b>Gardening</b>	<b>1%</b>
<b>Sailing</b>	<b>1%</b>
<b>Sight-seeing</b>	<b>1%</b>
<b>Geo-caching</b>	<b>1%</b>
<b>Art/ Photography</b>	<b>1%</b>
<b>Motorcycling</b>	<b>&lt;1%</b>
<b>Climbing</b>	<b>&lt;1%</b>
<b>Target shooting</b>	<b>&lt;1%</b>
<b>Volleyball</b>	<b>&lt;1%</b>
<b>Whale watching</b>	<b>&lt;1%</b>
<b>Snow shoveling</b>	<b>&lt;1%</b>
<b>Fair</b>	<b>&lt;1%</b>



# Appendix A: Additional Data

**QE. In what regions of Maine have you participated in outdoor activities during the last three years?**

Regions for Activities in Maine, Past 3 Years Base: All Respondents (n=191)	
Hancock County	2%
Somerset County	2%
Washington County	2%
Androscoggin County (including Lewiston-Auburn)	2%
Piscataquis County	1%
Allagash Wilderness Waterway	1%
Waldo County	<1%

# Appendix A: Additional Data

**Q4. Think of a ten-point scale where 1 means “Very Low Scenic Value” and 10 means “Very High Scenic Value.” What one outdoor destination in Maine have you visited that you would rate “8-10” as having high to very high scenic value?**

<b>Maine Outdoor Destinations offering HIGH Scenic Value</b>	
<b>Base: All Respondents (n=191)</b>	
<b>Piscataquis</b>	<b>2%</b>
<b>Marginal Way</b>	<b>1%</b>
<b>Northern Maine</b>	<b>&lt;1%</b>
<b>Central Maine</b>	<b>&lt;1%</b>
<b>Bald Mountain</b>	<b>&lt;1%</b>
<b>Mountains (non-specific)</b>	<b>&lt;1%</b>
<b>Allagash Waterway</b>	<b>&lt;1%</b>
<b>Sebago Lake Region</b>	<b>&lt;1%</b>
<b>Silver Lake</b>	<b>&lt;1%</b>
<b>Hancock County</b>	<b>&lt;1%</b>
<b>Grand Lakes Region</b>	<b>&lt;1%</b>

# Appendix A: Additional Data

**Q5. Please explain briefly why you selected the outdoor destination you identified as having very high scenic value.**

Reasons for Selection					
Base: All Respondents (n=191)					
Ocean/ Coast	23%	Seasons	2%	Open space	<1%
Mountain(s)	17%	Lighthouse(s)	2%	Island(s)	<1%
Activities	16%	Trail(s)/ Path(s)	2%	It's like being out West	<1%
Vistas/ View	14%	Boats/ Ships	2%		
Beautiful	14%	Town(s)	2%		
Familiarity	11%	Historic value	2%		
Lake(s)/ Pond(s)	7%	Architecture	1%		
Relaxing/ Peaceful	6%	Appalachian Trail	1%		
Nearness of varied surroundings	6%	Atmosphere	1%		
Pristine/ Undeveloped	6%	Forest(s)	1%		
Unpopulated/ Not crowded	5%	River(s)	1%		
Water (non-specific)	5%	Remote	1%		
Park	5%	Road(s)	1%		
Wildlife	4%	Waterfall(s)	1%		
People	4%	Value/ Affordability	1%		
Unique	3%	No valid response	1%		
Weather	3%	First place sun rises in US	<1%		
Enjoyment	3%	Highest point on East Coast	<1%		

# Appendix A: Additional Data

**Q6. In what region of Maine would you say you have gone to most often in the last three years to participate in the outdoor activities you mentioned earlier?**

<b>Maine Region Most Often Visited for Outdoor Activities (Past 3 Years)</b> <b>Base: All Respondents (n=191)</b>	
<b>Somerset County</b>	<b>2%</b>
<b>Piscataquis County</b>	<b>2%</b>
<b>Hancock County</b>	<b>2%</b>
<b>Rangeley Region</b>	<b>2%</b>
<b>Aroostook County</b>	<b>2%</b>
<b>Grand Lakes Region/ Down East Lakes</b>	<b>2%</b>
<b>Waldo County</b>	<b>1%</b>
<b>Baxter State Park/ Katahdin</b>	<b>1%</b>
<b>Wood Lot</b>	<b>&lt;1%</b>
<b>Grand Lakes Region—Duck Lake</b>	<b>&lt;1%</b>
<b>Allagash Wilderness Waterway</b>	<b>&lt;1%</b>
<b>Belgrade Lakes</b>	<b>&lt;1%</b>

# Appendix A: Additional Data

**Q13. What would you say are the top three reasons for <<RESPONSE IN Q8>>, specifically on or beside one of these lakes?**

Top Three Reasons – Study Area Base: Those who use the Study Area (n=31*)	
<b>Fishing</b>	<b>45%</b>
<b>Beautiful scenery/ View</b>	<b>36%</b>
<b>Enjoyment</b>	<b>26%</b>
<b>Not crowded/ Remote</b>	<b>19%</b>
<b>Socialization/ Friends/ Family</b>	<b>16%</b>
<b>Exercise</b>	<b>13%</b>
<b>Water</b>	<b>10%</b>
<b>Close proximity</b>	<b>10%</b>
<b>Camp</b>	<b>10%</b>
<b>Trails</b>	<b>7%</b>
<b>Familiarity</b>	<b>7%</b>
<b>Kayaking</b>	<b>3%</b>
<b>Within budget</b>	<b>3%</b>
<b>Relaxing</b>	<b>3%</b>
<b>Exploration</b>	<b>3%</b>
<b>Trees</b>	<b>3%</b>
<b>Don't Know</b>	<b>3%</b>

# Appendix A: Additional Data

**Q14. What one of those reasons would you say is your primary reason for <<RESPONSE IN Q8>>, specifically on or beside one of these lakes?**

Primary Reasons – Study Area Base: Those who use the Study Area (n=31*)	
Fishing	19%
Enjoyment	16%
Socialization/ Friends/ Family	10%
Exercise	10%
Beautiful scenery/ View	10%
Familiarity	7%
Not crowded/ Remote	7%
Water	3%
Close proximity	3%
Trails	3%
Camp	3%
Exploration	3%
Trees	3%
Don't Know	3%

# Appendix A: Additional Data

Q21. Where have you seen wind turbines? (PROBE ON CITY/TOWN, STATE/PROVINCE, COUNTRY)

Turbine Location					
Base: Those who have seen wind turbines (net) (n=168)					
Massachusetts	20%	Danforth, ME	2%	Orland, ME	1%
California	14%	Freedom, ME	2%	Western Maine (non-specific)	1%
Vermont	13%	Northern Maine (non-specific)	2%	Indiana	<1%
New York	11%	Kibby Mountain	2%	North Dakota	<1%
Mars Hill, ME	11%	Local (unspecified)	2%	Ohio	<1%
New Hampshire	10%	Iowa	1%	Oklahoma	<1%
Pennsylvania	6%	Minnesota	1%	Oregon	<1%
Rhode Island	5%	Texas	1%	South Dakota	<1%
Vinalhaven, ME	5%	Virginia	1%	Washington	<1%
Maine (non-specific)	4%	Quebec	1%	Wyoming	<1%
New Jersey	4%	Midwest (non-specific)	1%	China	<1%
Connecticut	2%	Germany	1%	Aruba	<1%
Hawaii	2%	Cape Elizabeth	1%	Prince Edward Island	<1%
Lincoln, ME	2%	Saco, ME	1%	Kentucky	<1%
Arizona	2%	Sugarloaf	1%	Tennessee	<1%
Colorado	2%	Aroostook County, ME	1%	Florida	<1%
Europe (non-specific)	2%	Rangeley, ME	1%	Michigan	<1%
Alaska	2%	Camden, ME	1%	Denmark	<1%

# Appendix A: Additional Data

Q21. Where have you seen wind turbines? (PROBE ON CITY/TOWN, STATE/PROVINCE, COUNTRY)

Turbine Location (cont'd.)			
Base: Those who have seen wind turbines (net) (n=168)			
Scotland	<1%	North Haven, ME	<1%
Netherlands	<1%	Carroll, ME	<1%
Missouri	<1%	Coastal Maine (non-specific)	<1%
Moosehead Lake, ME	<1%	Springfield, ME	<1%
Madawaska, ME	<1%	Press Island	<1%
Biddeford, ME	<1%	Palermo, ME	<1%
Stetson, ME	<1%	Plains states (non-specific)	<1%
Brownville, ME	<1%	Washington County, ME	<1%
Belgrade, ME	<1%	Kossuth Township, ME	<1%
Dexter, ME	<1%	Off Route 6 in Maine	<1%
Eustis and Straton, ME	<1%	Do not remember	<1%



# Appendix B: Questionnaire



Project#10.018

**First Wind Bowers Users Questionnaire**  
(January 6, 2011)

- Quotas:
- |                                   |                    |
|-----------------------------------|--------------------|
| 1. Use Study Area                 | Need at least n=50 |
| 2. Do not use/Aware of Study Area | No more than n=150 |

**Introduction**

Hello, my name is \_\_\_\_\_. I'm calling from Portland Research Group, an independent market research firm. We are conducting a research project about the outdoor activities people enjoy in the State of Maine. Please be assured that your responses will be kept strictly confidential and that we will not try to sell you anything.

**Screeners**

A. Are you an adult, eighteen years of age or older?

- |              |   |                       |
|--------------|---|-----------------------|
| YES          | 1 | (CONTINUE)            |
| NO           | 2 | (THANK AND TERMINATE) |
| REFUSED      | 8 | (THANK AND TERMINATE) |
| D.Q.N'T KNOW | 9 | (THANK AND TERMINATE) |

B. Have you personally participated in any outdoor activities in Maine within the last three years?

- |              |   |                       |
|--------------|---|-----------------------|
| YES          | 1 | (CONTINUE)            |
| NO           | 2 | (THANK AND TERMINATE) |
| REFUSED      | 8 | (THANK AND TERMINATE) |
| D.Q.N'T KNOW | 9 | (THANK AND TERMINATE) |

C. GENDER BY OBSERVATION (ASK IF NECESSARY) (NO MORE THAN A 45%/55% SPLIT BETWEEN GENDERS)

- |        |   |
|--------|---|
| MALE   | 1 |
| FEMALE | 2 |

One Union Wharf  
Portland, ME 04101-4777  
phone 207.874.2077  
fax 207.874.2076  
portlandresearch.com

D. What outdoor activities, if any, have you participated in within the State of Maine during the last three years? (DO NOT READ LIST. ACCEPT MULTIPLE RESPONSES. CLARIFY RESPONSES)

- |                                       |    |            |
|---------------------------------------|----|------------|
| ATV RIDING                            | 01 | (CONTINUE) |
| BICYCLING                             | 02 |            |
| BIRDING                               | 03 | (CONTINUE) |
| BOATING (MOTOR)                       | 04 | (CONTINUE) |
| CAMPING                               | 05 | (CONTINUE) |
| CANOEING OR KAYAKING                  | 06 | (CONTINUE) |
| FISHING                               | 07 | (CONTINUE) |
| FORAGING FOR WILD PLANTS OR MUSHROOMS | 08 | (CONTINUE) |
| HIKING OR WALKING                     | 09 | (CONTINUE) |
| HUNTING                               | 10 | (CONTINUE) |
| SKIING – CROSS COUNTRY/NORDIC         | 11 | (CONTINUE) |
| SKIING – DOWNHILL/ALPINE              | 12 |            |
| SNOWMOBILING                          | 13 | (CONTINUE) |
| SWIMMING                              | 14 |            |
| SPORTS (TEAM, TENNIS, GOLF, ETC.)     | 15 |            |
| SNOWSHOING                            | 16 | (CONTINUE) |

OTHER (Please Specify): \_\_\_\_\_

- |              |    |                       |
|--------------|----|-----------------------|
| REFUSED      | 98 | (THANK AND TERMINATE) |
| D.Q.N'T KNOW | 99 | (THANK AND TERMINATE) |

**MUST MENTION 01, 03-11, 13, OR 16 TO CONTINUE ELSE,  
THANK AND TERMINATE**

E. In what regions of Maine have you participated in <<QUALIFYING ACTIVITIES IN QD>> during the last three years? (DO NOT READ LIST. ACCEPT MULTIPLES.) (IF LAKE, ASK FOR SPECIFIC LOCATION)

- |                                   |    |
|-----------------------------------|----|
| ACADIA NATIONAL PARK              | 01 |
| ALLAGASH WILDERNESS WATERWAY      | 02 |
| AROOSTOOK COUNTY                  | 03 |
| BAXTER STATE PARK/KATAHDIN        | 04 |
| BELGRADE LAKES                    | 05 |
| CAMDEN HILLS                      | 06 |
| GRAND LAKES REGION/DOWNEAST LAKES | 07 |
| MOOSEHEAD LAKE REGION             | 08 |
| SEBAGO LAKE REGION                | 09 |
| WESTERN MAINE MOUNTAINS           | 10 |

OTHER (Please Specify): \_\_\_\_\_

- |              |    |                       |
|--------------|----|-----------------------|
| REFUSED      | 98 | (THANK AND TERMINATE) |
| D.Q.N'T KNOW | 99 | (THANK AND TERMINATE) |

Portland Research Group 2



**MAIN QUESTIONNAIRE**

1. On average, how many days each year do you spend in Maine for any reason? (IF RESPONDENT SAYS, "I live in Maine," TRY TO OBTAIN BEST ESTIMATE BY GETTING RESPONDENT TO THINK ABOUT TRIPS OUTSIDE OF MAINE SUCH AS VACATIONS, BUSINESS TRIPS, DAY TRIPS, ETC.)

Days per year IN MAINE FOR ANY REASON: \_\_\_\_\_  
 REFUSED 998  
 DON'T KNOW 999 (TRY TO OBTAIN BEST ESTIMATE)

2. On average, about how many days a year do you participate in the following outdoor activities in total at all locations: <<QUALIFYING ACTIVITIES IN QD>>?

Average Number of Days per year ALL LOCATIONS: \_\_\_\_\_  
 REFUSED 998  
 DON'T KNOW 999 (TRY TO OBTAIN BEST ESTIMATE)

3. On average, about how many days a year do you participate in the following outdoor activities in total in Maine: <<QUALIFYING ACTIVITIES IN QD>>?

Average Number of Days per year IN MAINE: \_\_\_\_\_  
 REFUSED 998  
 DON'T KNOW 999 (TRY TO OBTAIN BEST ESTIMATE)

4. Think of a ten-point scale where 1 means "Very Low Scenic Value" and 10 means "Very High Scenic Value". What one outdoor destination in Maine have you visited that you would rate "8 - 10" as having high to very high scenic value? (ACCEPT ONE RESPONSE)

\_\_\_\_\_

5. Please explain briefly the reasons why you selected the outdoor destination you identified as having very high scenic value.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

6. In what region of Maine would you say you have gone to most often in the last three years to participate in the outdoor activities you mentioned earlier: <<QUALIFYING ACTIVITIES IN QD>>? (DO NOT READ LIST. ACCEPT ONE RESPONSE) (IF LAKE, ASK FOR SPECIFIC LOCATION)

- ACADIA NATIONAL PARK 01
- ALLAGASH WILDERNESS WATERWAY 02
- AROOSTOOK COUNTY 03
- BAXTER STATE PARK/KATAHDIN 04
- BELGRADE LAKES 05
- CAMDEN HILLS 06
- GRAND LAKES REGION/DOWNEAST LAKES 07
- MOOSEHEAD LAKE REGION 08
- SEBAGO LAKE REGION 09
- WESTERN MAINE MOUNTAINS 10

OTHER (Please Specify): \_\_\_\_\_  
 REFUSED 98 (ASK TO IDENTIFY A DESTINATION)  
 DON'T KNOW 99 (ASK TO IDENTIFY A DESTINATION)

7. I am going to read you a list of lakes located in Maine approximately 75 miles northeast of Bangor, Maine just south of the Springfield area off Route 6. You may have heard of lakes with the same or similar names in other parts of Maine. All of the lakes I am going to mention are located in either Washington or Penobscot counties. For each lake please indicate how often you participate in the outdoor activities you mentioned earlier, <<QUALIFYING ACTIVITIES IN QD>>, either on or beside the lake. Please use a ten-point scale where 1 means, "Never" and 10 means "Regularly" to indicate your response. If you are not aware of the lake I mention, please say so. (RANDOMIZE LIST)

Lakes	Never									Regularly	Not Aware
a. Bottle Lake in Lakeville	1	2	3	4	5	6	7	8	9	10	90
b. Duck Lake in Lakeville	1	2	3	4	5	6	7	8	9	10	90
c. Lower Sysladobsis (Sys-la-DOB-sis) Lake in Lakeville	1	2	3	4	5	6	7	8	9	10	90
d. Keg Lake in Lakeville	1	2	3	4	5	6	7	8	9	10	90
e. Junior Lake in Pukakon (PUCK-a-kon)	1	2	3	4	5	6	7	8	9	10	90
f. Scraggley Lake near Junior Lake in Pukakon (PUCK-a-kon)	1	2	3	4	5	6	7	8	9	10	90
g. Shaw Lake, between Pleasant and Scraggley Lakes, in Pukakon (PUCK-a-kon)	1	2	3	4	5	6	7	8	9	10	90
h. Pleasant Lake in Kossuth Township	1	2	3	4	5	6	7	8	9	10	90

IF RATING OF 4 – 10 FOR AT LEAST ONE LAKE RECORD AS QUOTA 1 AND CONTINUE ELSE, RECORD AS QUOTA 2 AND SKIP TO Q20

8. (IF MORE THAN ONE QUALIFYING ACTIVITY MENTIONED IN QD, ASK Q8, ELSE USE ACTIVITY FROM QD AS RESPONSE TO Q8 AND SKIP TO Q9) Which of the outdoor activities you mentioned earlier, <<QUALIFYING ACTIVITIES IN QD>>, do you participate in most frequently on or beside one of the lakes I just mentioned? (ACCEPT ONE RESPONSE)

<<INSERT LIST OF QUALIFIED ACTIVITIES MENTIONED IN QD>>

9. The next group of questions will refer to your experiences <<RESPONSE IN Q8>> on or beside one of the lakes I just mentioned. When you participate in this outdoor activity on or beside those lakes, how often do you use guides or hire local experts? Would you say... (READ LIST)?

Always,	5
Most of the time,	4
Some of the time,	3
Rarely, or	2
Never	1
REFUSED	8
DON'T KNOW	9

10. At what types of lodging do you typically spend the night when <<RESPONSE IN Q8>> on or beside one of the lakes I just mentioned? (DO NOT READ LIST. ACCEPT MULTIPLE RESPONSES.)

RESPONDENT'S PRIMARY RESIDENCE	01
RESPONDENT'S SECOND/VACATION HOME/CONDO	02
HOME OF FAMILY/RELATIVE/FRIEND	03
BED & BREAKFAST/INN/SPORTING LODGE/HUNTING LODGE	04
HOTEL OR MOTEL	05
RENTAL HOME/CONDO/TIMESHARE	06
STATE PARK/CAMPGROUND	07
PRIVATE CAMPGROUND OR RV PARK	08
OTHER (Please Specify): _____	
REFUSED	98
DON'T KNOW	99

11. In what seasons are you typically <<RESPONSE IN Q8>> on or beside one of these lakes? (READ LIST TO DEFINE SEASONS. ACCEPT MULTIPLE RESPONSES)

Winter, consisting of December, January, and February	1
Spring, consisting of March, April and May	2
Summer, consisting of June, July and August	3
Fall, consisting of September, October and November	4
REFUSED	8
DON'T KNOW	9

12. On average, about how many days a year do you spend <<RESPONSE IN Q8>>, on or beside one of these lakes?

AVERAGE NUMBER OF DAYS PER YEAR AT ONE OF THESE LAKES: _____	
REFUSED	998
DON'T KNOW (TRY TO OBTAIN BEST ESTIMATE)	999

13. What would you say are the top three reasons for <<RESPONSE IN Q8>>, specifically on or beside one of these lakes? (PROBE FOR SPECIFICS)

- a. \_\_\_\_\_
- b. \_\_\_\_\_
- c. \_\_\_\_\_

14. What one of those reasons would you say is your primary reason for <<RESPONSE IN Q8>>, specifically on or beside one of these lakes? (MUST SELECT ONE RESPONSE)

REASON A	1
REASON B	2
REASON C	3

15. How unlikely or likely do you expect to see the following while <<RESPONSE IN Q8>> specifically on or beside one of these lakes? Please use a ten-point scale where 1 means, "Very Unlikely" and 10 means "Very Likely" to indicate your response. (RANDOMIZE LIST)

	Very Unlikely					Very Likely				
a. Recreational Resorts (Ski, Golf, etc.)	1	2	3	4	5	6	7	8	9	10
b. Snowmobile/ATV Trails	1	2	3	4	5	6	7	8	9	10
c. Energy facilities such as wind farms	1	2	3	4	5	6	7	8	9	10
d. Cut over forest lands	1	2	3	4	5	6	7	8	9	10
e. Electrical transmission lines	1	2	3	4	5	6	7	8	9	10
f. Second home developments	1	2	3	4	5	6	7	8	9	10
g. Town Centers	1	2	3	4	5	6	7	8	9	10
h. Communications Towers	1	2	3	4	5	6	7	8	9	10
i. Industrial facilities such as paper mills	1	2	3	4	5	6	7	8	9	10
j. Logging roads	1	2	3	4	5	6	7	8	9	10
k. Lake drawdowns	1	2	3	4	5	6	7	8	9	10
l. Dam or Hydro Power Facility	1	2	3	4	5	6	7	8	9	10

16. Please rate how your overall enjoyment would be affected, if at all, if you saw the following while <<RESPONSE IN Q8>>, specifically on or beside one of these lakes? Please use a ten-point scale where 1 means, "Very Negative Effect" and 10 means "Very Positive Effect" to indicate your response. (RANDOMIZE LIST)

	Very Negative Effect					Very Positive Effect				
a. Recreational Resorts (Ski, Golf, etc.)	1	2	3	4	5	6	7	8	9	10
b. Snowmobile/ATV Trails	1	2	3	4	5	6	7	8	9	10
c. Energy facilities such as wind farms	1	2	3	4	5	6	7	8	9	10
d. Cut over forest lands	1	2	3	4	5	6	7	8	9	10
e. Electrical transmission lines	1	2	3	4	5	6	7	8	9	10
f. Second home developments	1	2	3	4	5	6	7	8	9	10
g. Town Centers	1	2	3	4	5	6	7	8	9	10
h. Communications Towers	1	2	3	4	5	6	7	8	9	10
i. Industrial facilities such as paper mills	1	2	3	4	5	6	7	8	9	10
j. Logging roads	1	2	3	4	5	6	7	8	9	10
k. Lake drawdowns	1	2	3	4	5	6	7	8	9	10
l. Dam or Hydro Power Facility	1	2	3	4	5	6	7	8	9	10

17. Using a ten-point scale where 1 means you are "Much Less likely" and 10 means you are "Much More Likely", please rate your likelihood of personally returning to these lakes for <<RESPONSE IN Q8>> if you saw the following while <<RESPONSE IN Q8>>, either on or beside one of these lakes. (RANDOMIZE LIST)

	Much Less Likely					Much More Likely				
a. Recreational Resorts (Ski, Golf, etc.)	1	2	3	4	5	6	7	8	9	10
b. Snowmobile/ATV Trails	1	2	3	4	5	6	7	8	9	10
c. Energy facilities such as wind farms	1	2	3	4	5	6	7	8	9	10
d. Cut over forest lands	1	2	3	4	5	6	7	8	9	10
e. Electrical transmission lines	1	2	3	4	5	6	7	8	9	10
f. Second home developments	1	2	3	4	5	6	7	8	9	10
g. Town Centers	1	2	3	4	5	6	7	8	9	10
h. Communications Towers	1	2	3	4	5	6	7	8	9	10
i. Industrial facilities such as paper mills	1	2	3	4	5	6	7	8	9	10
j. Logging roads	1	2	3	4	5	6	7	8	9	10
k. Lake drawdowns	1	2	3	4	5	6	7	8	9	10
l. Dam or Hydro Power Facility	1	2	3	4	5	6	7	8	9	10

18. If you went to these lakes for <<RESPONSE IN Q8>> and saw evidence of a project or something else that caused you not to want to return, is there another lake, region or location in Maine you could go to and enjoy the same outdoor activity equally as much or more?

YES	1	(CONTINUE)
NO	2	(SKIP TO Q20)
REFUSED	8	(SKIP TO Q20)
DON'T KNOW	9	(SKIP TO Q20)

19. What region or location in Maine would you go to instead? (DO NOT READ LIST. ACCEPT ONE RESPONSE)

ACADIA NATIONAL PARK	01
ALLAGASH WILDERNESS WATERWAY	02
AROOSTOOK COUNTY	03
BAXTER STATE PARK/KATAHDIN	04
BELGRADE LAKES	05
CAMDEN HILLS	06
MOOSEHEAD LAKE REGION	07
SEBAGO LAKE REGION	08
WESTERN MAINE MOUNTAINS	09

OTHER (Please Specify): _____	
REFUSED	98 (ASK TO IDENTIFY A DESTINATION)
DON'T KNOW	99 (ASK TO IDENTIFY A DESTINATION)

**ASK EVERYONE**

20. Have you personally seen wind turbines... READ LIST?

	YES	NO	REFUSED	DON'T KNOW
a. In Maine	1	2	8	9
b. Outside of Maine	1	2	8	9

IF "YES" TO Q20A OR Q20B CONTINUE, ELSE SKIP TO Q22

21. Where have you seen wind turbines? (PROBE ON CITY/TOWN, STATE/PROVINCE, COUNTRY)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

22. Using a ten-point scale where 1 means "Do Not Support At All" and 10 means "Completely Support", to what extent do you not support or support commercial-scale wind energy development in Maine?

Do Not Support at All					Completely Support					Refused	Don't Know
01	02	03	04	05	06	07	08	09	10	98	99

23. The remaining classification questions help us to develop an overall respondent profile, but will not identify you in any way. What, if any, outdoor or conservation organizations do you belong to? (DO NOT READ LIST. ACCEPT MULTIPLE RESPONSES.)

ALLIANCE OF TRAIL VEHICLES OF MAINE	01
APPALACHIAN MOUNTAIN CLUB (A.M.C.)	02
APPALACHIAN TRAIL CONSERVANCY (A.T.C.)	03
MAINE AUDUBON SOCIETY	04
MAINE SNOWMOBILE ASSOCIATION	05
NATURAL RESOURCES COUNCIL OF MAINE	06
SPORTSMAN'S ALLIANCE OF MAINE	07
THE NATURE CONSERVANCY	08
OTHER (Please specify): _____	
REFUSED	98
DON'T KNOW	99

24. Into which of the following ranges does your age fall? (READ LIST)

18 to 24,	1
25 to 34,	2
35 to 44,	3
45 to 54,	4
55 to 64,	5
65 to 74, or	6
75 or older	7
REFUSED	8

25. Do you have any children less than 18 years old living in your household?

YES	1
NO	2
REFUSED	8
DON'T KNOW	9

26. What is the 5-DIGIT zip code where your primary residence is located?

REFUSED	99998
DON'T KNOW	99999

27. (IF PRIMARY RESIDENCE IN MAINE FROM Q26) For how many years has your primary residence been located in Maine?

YEARS: _____	MONTHS: _____
REFUSED	98
DON'T KNOW	99

28. Do you own a second or vacation home or camp in Maine? (INCLUDE FOUR SEASON HOMES OR CONDOS, SEASONAL FISHING/HUNTING/RECREATIONAL CAMPS, AND LAKESHORE CAMPS)

YES	1	(CONTINUE)
NO	2	(SKIP TO Q31)
REFUSED	8	(SKIP TO Q31)
DON'T KNOW	9	(SKIP TO Q31)

29. What is the 5-DIGIT zip code where your second home in Maine is located?

REFUSED 99998  
DONT KNOW 99999

30. (IF SECOND HOME IN MAINE FROM Q29) For how many years have you owned a second home in Maine?

YEARS: \_\_\_\_\_ MONTHS: \_\_\_\_\_

REFUSED 98  
DONT KNOW 99

31. (IF NO PRIMARY RESIDENCE NOR SECOND HOME IN MAINE) For how many years have you been visiting Maine to participate in the outdoor activities we have been discussing?

YEARS: \_\_\_\_\_ MONTHS: \_\_\_\_\_

REFUSED 98  
DONT KNOW 99

32. Which of the following broad ranges best describes your 2010 annual household pre-tax income from all sources? (READ LIST)

Less than \$35,000	1
\$35,000 to less than \$50,000	2
\$50,000 to less than \$75,000	3
\$75,000 to less than \$100,000	4
\$100,000 to less than \$150,000	5
\$150,000 to less than \$200,000, or	6
\$200,000 or more	7
REFUSED	8
DONT KNOW	9

(PLEASE VERIFY)

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

Telephone Number with Area Code: \_\_\_\_\_

**THANK YOU VERY MUCH FOR YOUR TIME!**

*Portland Research Group 11*

# For More Information

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# Bowers Mountain Wind Project Outdoor Activities Users Research *Snowmobiler Survey*



Portland  
Research  
Group

Portland Research Group  
Portland, Maine  
February 2011

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Appendix A: Additional Data

Appendix B: Questionnaire

# Objectives

This study focuses on the region encompassing and including scenic lakes with visibility within 8 miles of the Bowers Wind Project. Throughout this report, this region is referred to as the “Study Area.”

The primary objectives of this study are to:

- Determine how the lakes and land within the Study Area, and elsewhere in Maine, are used.
  - Measure awareness of the Study Area.
  - Frequency of usage.
- Understand expectations for views in the Study Area.
  - Explore the extent to which people expect to see “human-made” structures when using the Study Area.
  - Determine the impact of such structures on people’s enjoyment and likelihood of returning to the Study Area.
- Assess whether and how commercial wind power projects fit within expectations of viewers using the Study Area and other parts of Maine for outdoor activities.
  - Measure respondents’ support for wind energy projects.

# Methodology

<b>Respondent Criteria</b>	<ul style="list-style-type: none"> <li>Adults, 18 years or older, who participated in the Second Annual Stetson Wind Snowmobile Ride-In at First Wind’s Stetson Mountain facility.</li> </ul>
<b>Respondent Counts</b>	<ul style="list-style-type: none"> <li>n=69</li> </ul>
<b>Response Rate</b>	<ul style="list-style-type: none"> <li>46% (69 of approximately 150 attendees) The number of attendees is based on number of riders who checked-in at the O&amp;M Building. Some of the attendees were children who were not qualified to take the survey. If anything the response rate is likely to be higher.</li> </ul>
<b>Data Collection</b>	<ul style="list-style-type: none"> <li>In-person Intercepts on Saturday, February 19 at Stetson Mountain facility.</li> </ul>
<b>Research Caveat</b>	<ul style="list-style-type: none"> <li>This report provides many useful insights with reasonable sample sizes. However, some results should be used directionally due to sample sizes less than 50.</li> </ul>
<b>Questionnaire</b>	<ul style="list-style-type: none"> <li>Structured questionnaire containing 21 questions (69 variables), self-administered by respondent or administered by a Portland Research Group employee.</li> <li>Questions addressed frequency and location of outdoor activities; logistics of and reasons for using the Study Area for outdoor activities; expectations for views and effects of specific human-made developments/ alterations on overall enjoyment and likelihood of returning to the Study Area; and position on commercial-scale wind energy developments in Maine. (The full questionnaire can be found in Appendix B of this report.)</li> </ul>

# Methodology: Sample Segments

- A random sample size of n=69 yields a maximum sampling error of +/- 11.8 percentage points at the 95% level of confidence. That is, if the reported percentage is 50%, one can be 95% confident that the percentage for the entire population would be within the range of 38.2% and 61.8%. The sample tolerances for smaller subgroups are broader: n=16, +/- 24.5 percentage points.

	<u>Sample Size</u>
<b>Total†</b>	n=69
<b>Use Study Area</b>	
Yes	n=44*
No	n=20*
<b>Disposition to Wind Energy</b>	
Support (8-10)	n=46*
Less than support (1-7)	n=16*
<b>Age</b>	
18-54	n=37*
55 or older	n=28*
<b>Gender</b>	
Male	n=41*
Female	n=23*

† Base sizes reflect the number of respondents who answered a given question. As this survey was primarily self-administered, bases sizes do not always reflect the logical progression of the questionnaire.

\*Caution, small base (n<50); use for directional purposes only



# Key Findings

- Respondents participate in a variety of outdoor activities in the Study Area, with snowmobiling (84%†), fishing (81%) and motor boating (68%) as the top three.
- Of the eight lakes tested, Lower Sysladobsis Lake (92%), Bottle Lake (92%) and Duck Lake (92%) received the highest levels of awareness.
- With over half of the respondents (56%) reporting that they use it sometimes or more often, Lower Sysladobsis Lake has the highest usage rate of the eight lakes tested.
- Half of the respondents (50%; 20 of 40\*) indicated that seeing energy facilities such as wind farms while participating in their most frequent outdoor activity in the study area would have a positive impact on their overall enjoyment.
  - Wind farms were second only to snowmobile/ ATV trails in terms of having a positive effect on enjoyment.
- Half of the respondents (50%; 20 of 40\*) indicated that seeing energy facilities such as wind farms would make them more likely to return to an area for their outdoor activity of choice.
- Almost three-quarters of respondents (72%) support the development of commercial-scale wind energy in Maine. One-quarter (25%) is neutrally disposed to it; none of those interviewed indicated a negative disposition.

†Evidence that not all respondents surveyed at this snowmobile themed event may be due to the self-administration of the surveys. Another possible explanation is that respondents who rode to the event as passengers on a snowmobile driven by someone else may not consider that activity as constituting snowmobiling.

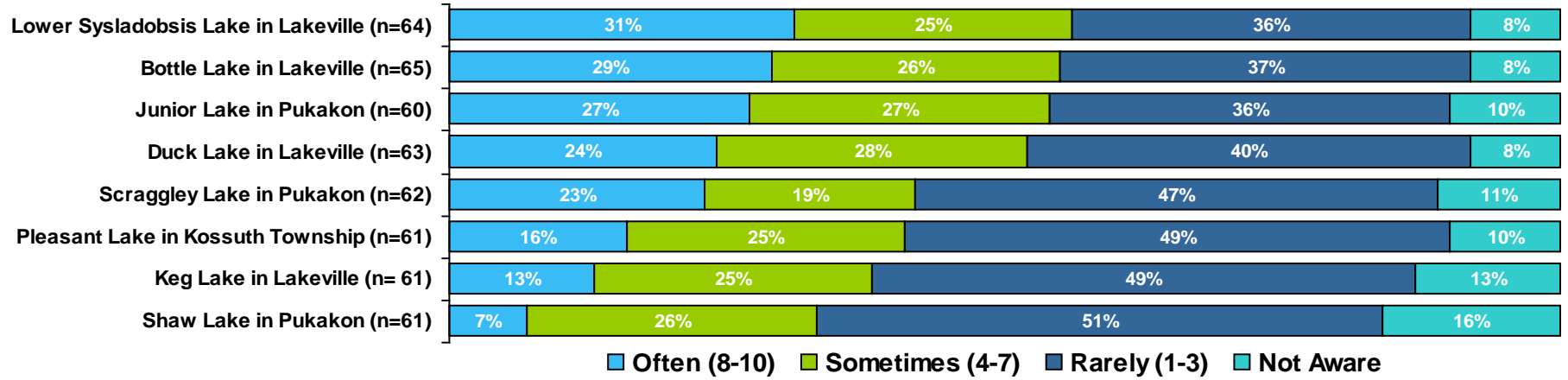
\*Caution, small base (n<50); use for directional purposes only

# Detailed Findings

# Frequency of Outdoor Activity Participation in the Study Area

- One-third of respondents often use Lower Sysladobsis Lake (31%) for their outdoor activities, followed by Bottle Lake (29%) and Junior Lake (27%).
  - Those who use Bottle Lake (44%; 16 of 36\* vs. 11%; 3 of 27\*), Duck Lake (40%; 14 of 35\* vs. 4%; 1 of 27\*), Junior Lake (40%; 14 of 35\* vs. 8%; 2 of 24\*), and Scraggley Lake (33%; 12 of 36\* vs. 8%; 2 of 25\*) are significantly more likely to be under 55 years of age than they are to be 55 or older.
- One-sixth of respondents were not aware of Shaw Lake (16%), followed by Keg Lake (13%), and Scraggley Lake (11%).

**Frequency of Outdoor Activity Participation in the Study Area**  
Base: Those Providing a Response



\*Caution, small base (n<50); use for directional purposes only

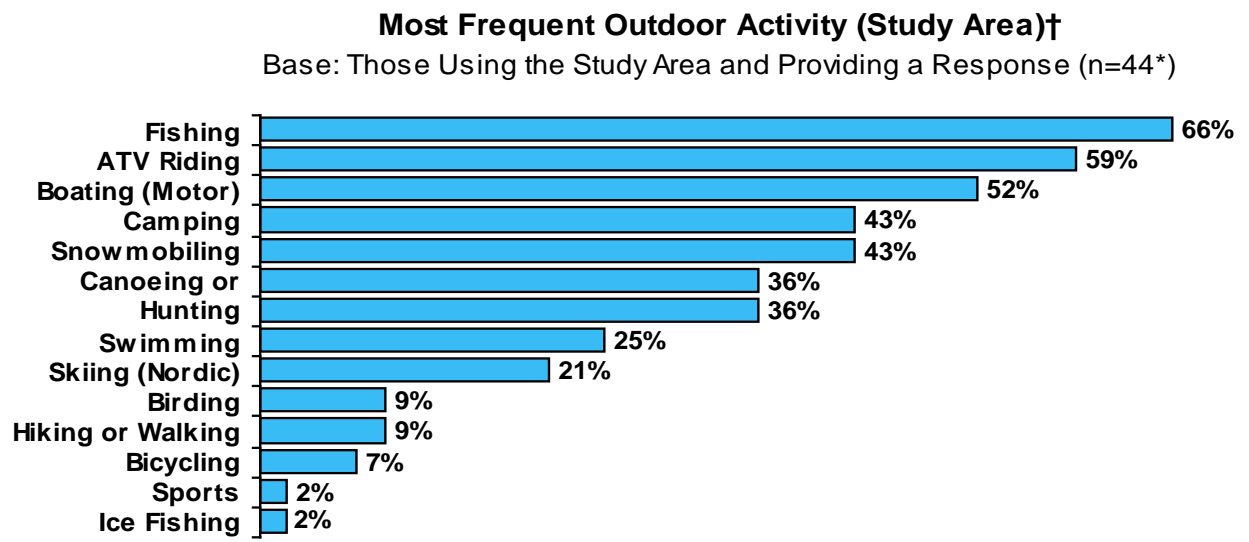
➤ Q3. Please read the list of lakes located near here, just south of the Springfield area off Route 6. You may have heard of lakes with the same or similar names in other parts of Maine. All of the lakes I am going to mention are located in either Washington or Penobscot counties. For each lake please indicate how often you participate in the outdoor activities you mentioned earlier, either on or beside the lake. For each lake, please use a ten-point scale where 1 means, "Never" and 10 means "Regularly" to indicate your response. Please circle "90" if you are not aware of the lake mentioned.





# Most Common Outdoor Activities in the Study Area

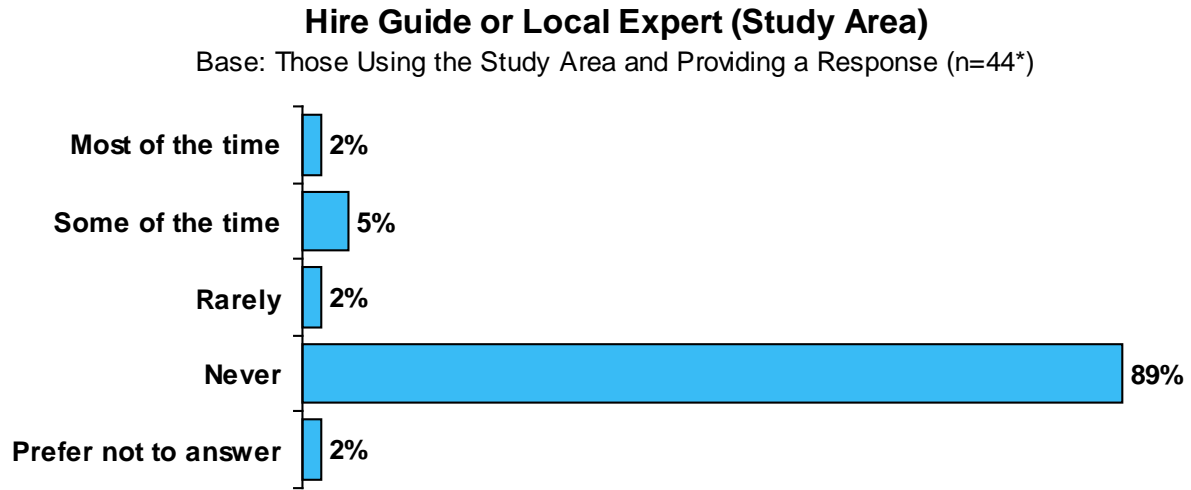
- Two-thirds of respondents who use the Study Area (66%; 29 of 44\*) indicated that fishing is their most frequent outdoor activity in the Study Area, followed by ATV riding (59%; 26 of 44\*), and motor boating (52%; 23 of 44\*).



†Responses do not total to 100%. In spite of instructions to select only one response, many of the self-administered respondents provided multiple responses.  
 \*Caution, small base (n<50); use for directional purposes only  
 > Q4. What outdoor activity have you participated in most frequently on or beside one of the lakes listed in question 3? (Aided, single response)

# Hire Guide or Local Expert

- Most respondents who use the Study Area (89%; 39 of 44\*) never hire a guide or local expert when participating in outdoor activities in the Study Area.

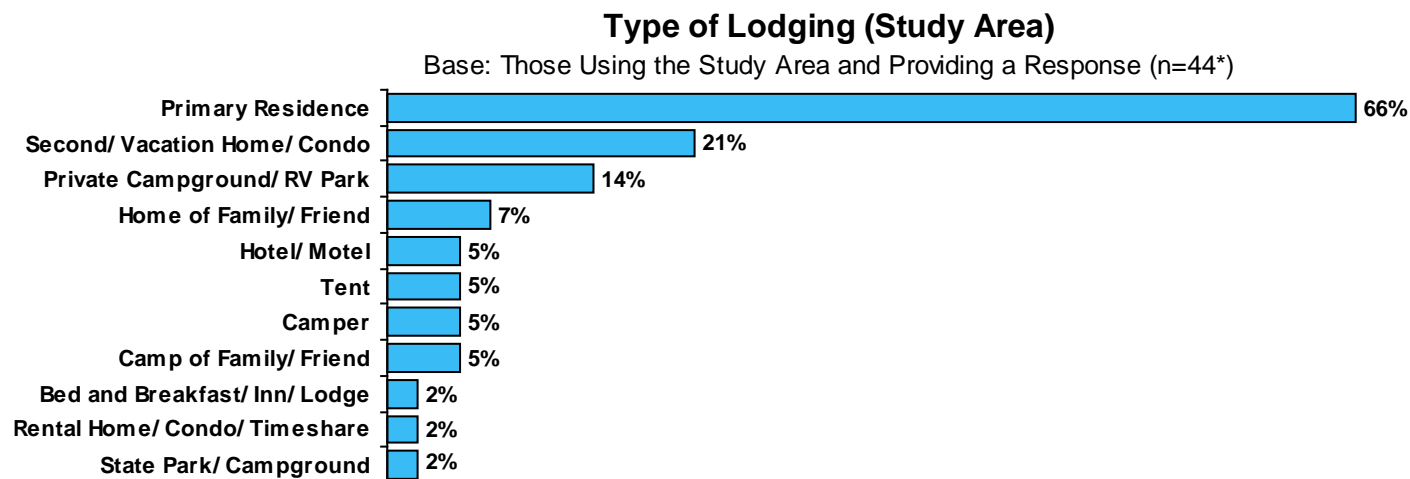


\*Caution, small base (n<50); use for directional purposes only

> Q5. The next group of questions will refer to your experiences on or beside one of the lakes mentioned in question 3. When you participate in the outdoor activity you identified in question 4 on or beside those lakes, how often do you use guides or hire local experts? Would you say... (Aided, single response)

# Type of Lodging

- Two-thirds of respondents who use the Study Area (66%; 29 of 44\*) spend the night at their primary residence when participating in outdoor activities in the Study Area, followed distantly by a second/ vacation home/ condo (21%; 9 of 44\*) and private campgrounds/ RV parks (14%; 6 of 44\*).



\*Caution, small base (n<50); use for directional purposes only

> Q6. At what types of lodging do you typically spend the night when you participate in your most frequent activity on or beside one of the lakes listed previously?  
(Aided, multiple response)

# Seasons Participating in Outdoor Activities

- Respondents who use the Study Area reported a high level of participation in outdoor activities in the Study Area throughout the year.
  - Virtually all respondents (91%; 40 of 44\*) participate in outdoor activities in the Study Area during the summer, followed by those who do so in winter (80%; 35 of 44\*), fall (64%; 28 of 44\*) and spring (55%;24 of 44\*).

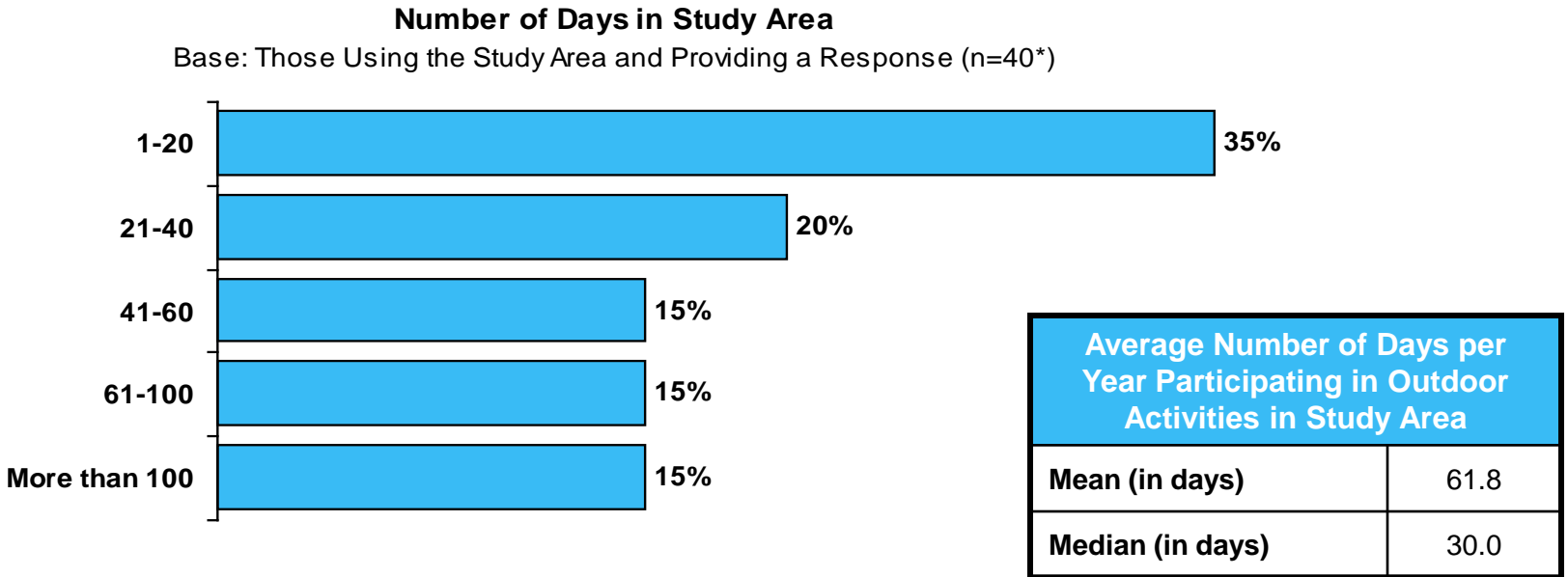
**Seasons Participating in Outdoor Activities (Study Area)**  
Base: Those Using the Study Area and Providing a Response (n=44\*)



\*Caution, small base (n<50); use for directional purposes only  
> Q7. In what seasons are you typically participating in your most frequent outdoor activity on or beside one of the lakes listed previously? (Aided, multiple response)

# Number of Days in the Study Area

- One-third of respondents who use the Study Area (35%; 14 of 40\*) spend on average 1-20 days of the year participating in outdoor activities in the Study Area.
- Overall users spend an average of 61.8 days per year participating in outdoor activities in the Study Area, with a median of 30 days.



\*Caution, small base (n<50); use for directional purposes only

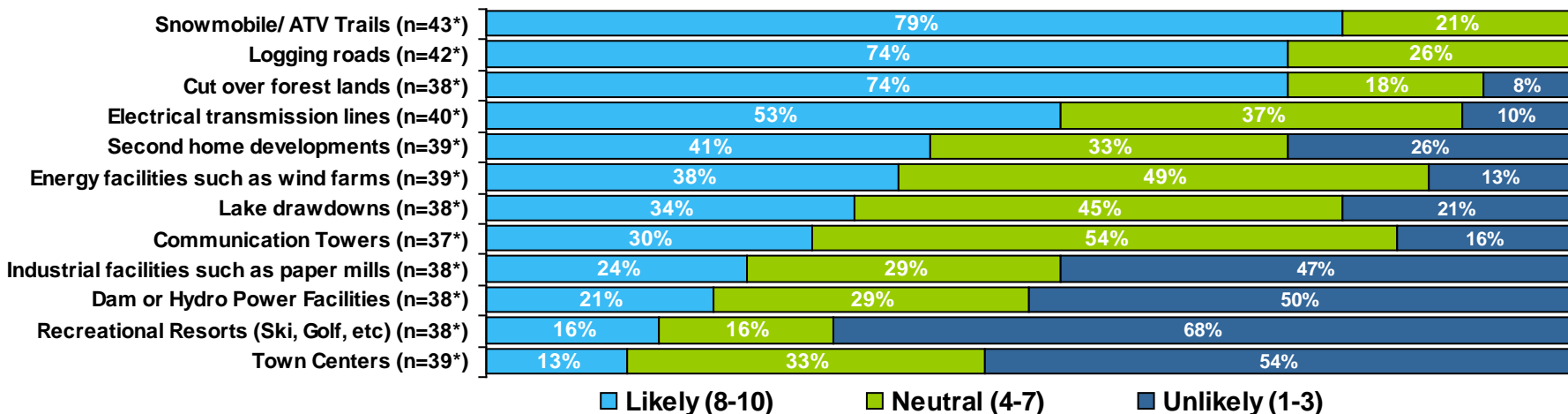
> Q8. On average, about how many days a year do you spend participating in your most frequent outdoor activity on or beside one of these lakes? (Aided, single response)

# Expectations During Outdoor Activity

- Four-fifths (79%; 34 of 43\*) of Study Area users considered it likely to see snowmobile or ATV trails, followed by logging roads (74%; 31 of 42\*), and cut over forest lands (74%; 28 of 38\*) near one of the lakes in the Study Area.
- Two-thirds (68%; 26 of 38\*) considered it unlikely to see recreational resorts.
- Two-fifths (38%; 15 of 39\*) considered it likely to see energy facilities such as wind farms, while only one-eighth (13%; 5 of 39\*) consider this an unlikely sight.

**Likelihood of Seeing Visible Development in the Study Area**

Base: Those Using the Study Area and Providing a Response



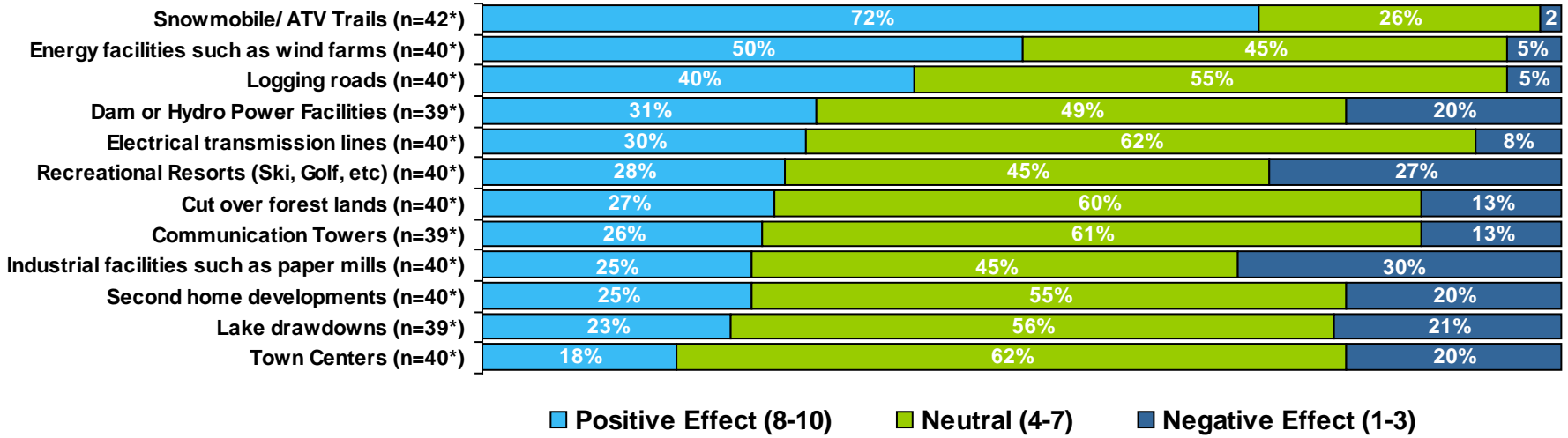
\*Caution, small base (n<50); use for directional purposes only

> Q9. How unlikely or likely do you expect to see the following while participating in your most frequent outdoor activity specifically on or beside one of these lakes? For each item, please circle on number, using a ten-point scale where 1 means, "Very Unlikely" and 10 means "Very Likely" to indicate your response.

# Effect of Visible Development on Enjoyment

- Over two-thirds (72%; 30 of 42\*) of Study Area users reported that seeing snowmobile or ATV trails would have a positive impact on their enjoyment, followed by energy facilities such as wind farms (50%; 20 of 40\*) and logging roads (40%; 16 of 40\*).
  - Few respondents (5%) indicated that seeing wind farms would have a negative impact.

**Impact on Enjoyment**  
Base: Those Using the Study Area and Providing a Response



\*Caution, small base (n<50); use for directional purposes only

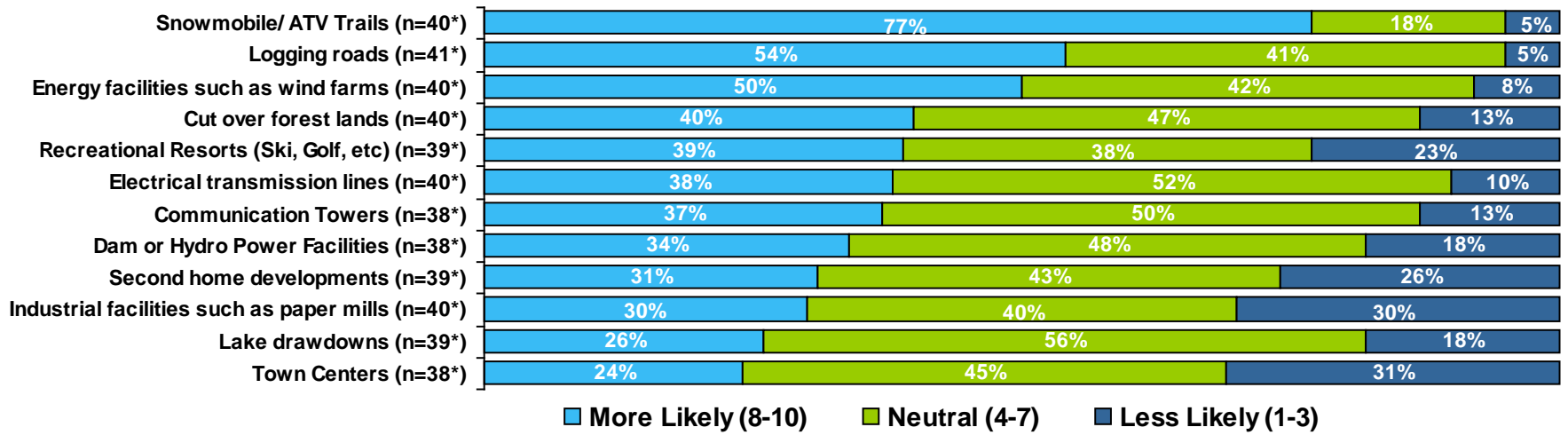
> Q10. Please rate how your overall enjoyment would be affected, if at all, if you saw the following while participating in your most frequent outdoor activity specifically on or beside one of these lakes? For each item, please circle one number, using a ten-point scale where 1 means, "Very Negative Effect" and 10 means "Very Positive Effect" to indicate your response.

# Effect of Visible Development on Likelihood of Returning

- Three-quarters of respondents who use the Study Area (77%; 31 of 40\*) indicated that seeing snowmobile or ATV trails would increase their likelihood of returning to the Study Area, followed by logging roads (54%; 22 of 41\*) and energy facilities such as wind farms (50%; 20 of 40\*)
  - Less than one-tenth (8%; 3 of 40\*) reported that seeing wind farms would decrease their likelihood of returning.

**Likelihood of Returning to the Study Area for Outdoor Activities**

Base: Those Using the Study Area and Providing a Response



\*Caution, small base (n<50); use for directional purposes only

> Q11. What is the likelihood of your personally returning to these lakes to participate in your most frequent outdoor activity if you saw the following while participating in that activity, either on or beside one of these lakes? For each item please circle one number, using a ten-point scale where 1 means you are "Much Less Likely" and 10 means you are "Much More Likely."

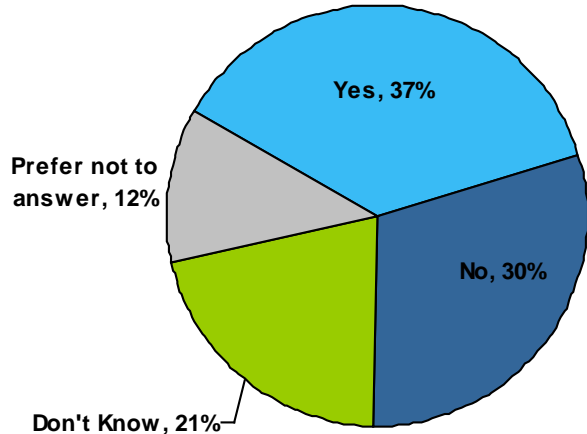


# Go to Another Maine Location

- More than one-third of respondents who use the Study Area (37%; 16 of 43\*) indicated that there are alternative locations in Maine where they could enjoy their most frequent outdoor activities an equal or greater amount if developments in the Study Area made them not want to return.
- Less than one-third (30%; 13 of 43\*) indicated that there was no such place.

### Go Elsewhere in Maine if Negative Developments Sighted

Base: Those Using the Study Area and Providing a Response (n=43\*)

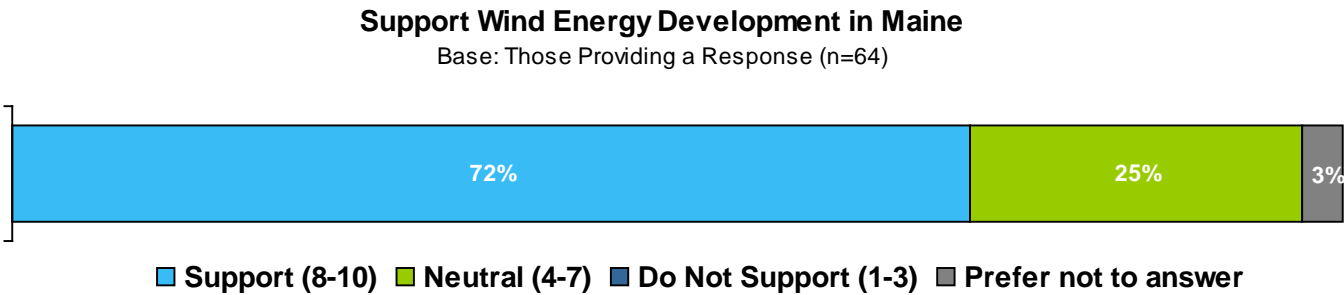


\*Caution, small base (n<50); use for directional purposes only

➤ Q12. If you went to these lakes to participate in your most frequent outdoor activity and saw evidence of a project or something else that caused you not to want to return, is there another lake, region or location in Maine you could go to and enjoy the same outdoor activity equally as much or more? (Aided, single response)

# Support Wind Energy Development in Maine

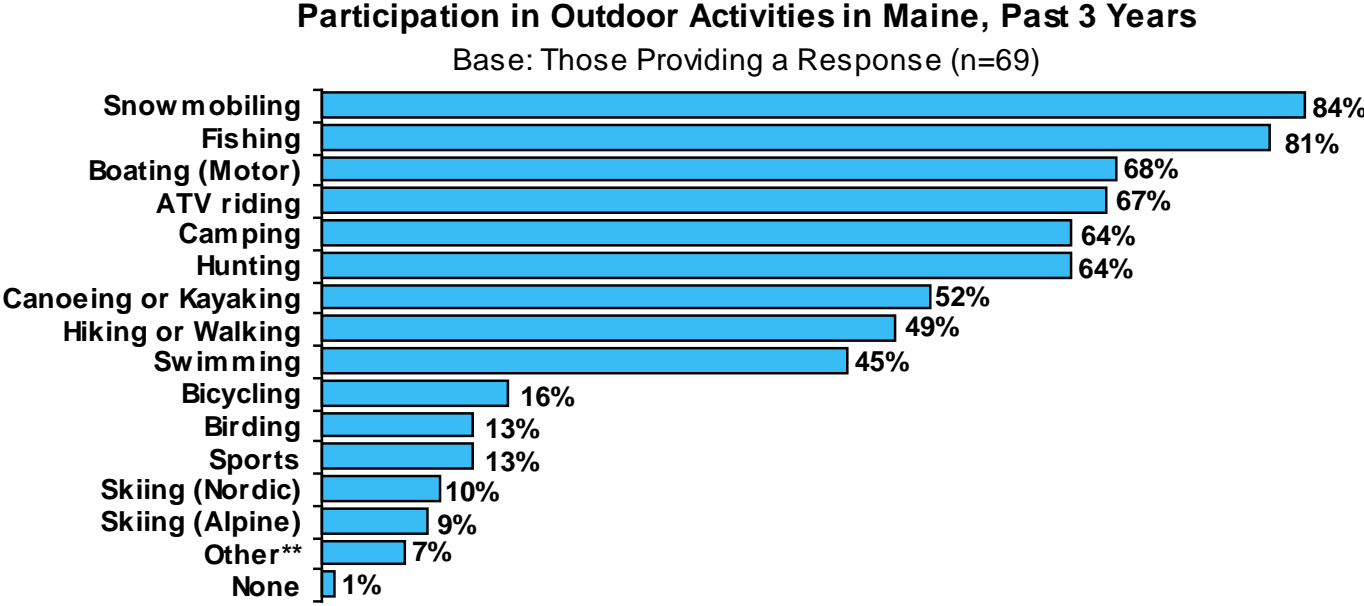
- Almost three-quarters of all respondents (72%) support the development of commercial-scale wind energy in Maine.
- None of the respondents indicated that they do not support wind development in Maine.



➤ Q13. To what extent do you not support or support commercial-scale wind energy development in Maine? Please circle one number, using a ten-point scale where 1 means, "Do Not Support At All" and 10 means, "Completely Support."

# Outdoor Activities in Maine

- Given the focus of the event, it is not surprising that most respondents (84%) reported participating in snowmobiling in Maine during the last three years.
  - The fact that not all respondents surveyed at this snowmobile themed event reported participating in snowmobiling in Maine during the last three years may be due to the self-administration of the surveys. Another possible explanation is that respondents who rode to the event as passengers on a snowmobile driven by someone else may not consider that activity as constituting snowmobiling.
- Four-fifths (81%) reported fishing in Maine during the last three years, followed by motor boating (68%), ATV riding (67%), camping (64%), and hunting (64%).



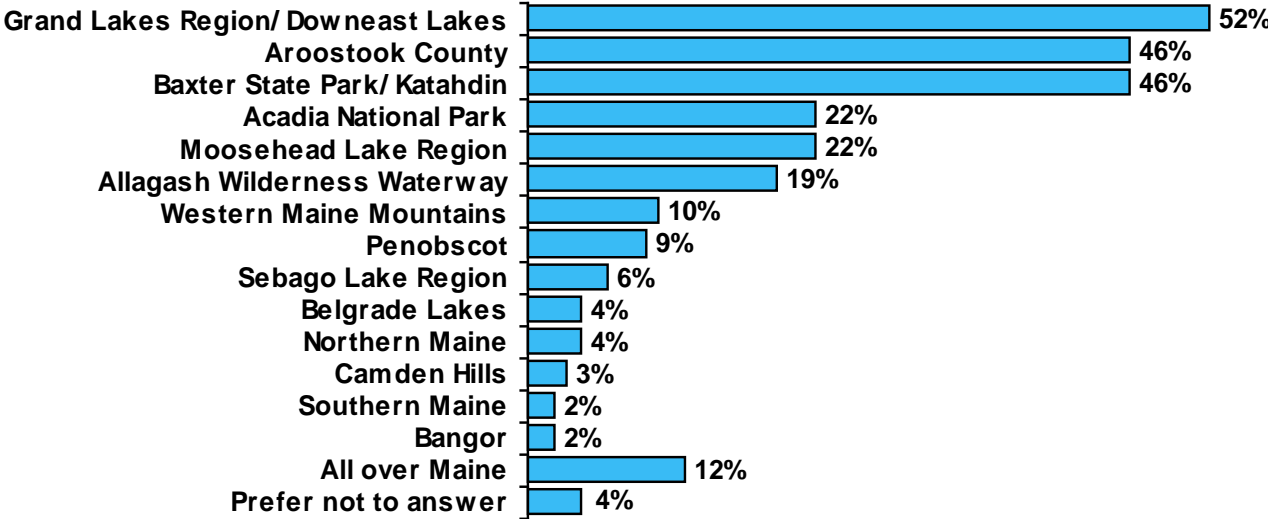
➤ Q1. Including snowmobiling, what outdoor activities, if any, have you participated in within the State of Maine during the last three years? (Aided, multiple response)

# Maine Regions for Outdoor Activities

- One-half of respondents (52%) have participated in outdoor activities in the Grand Lakes Region/ Downeast Lakes in the last 3 years, followed by Aroostook County (46%) and Baxter State Park/ Katahdin (46%).
  - Those who have not used the Study Area in the past 3 years are significantly more likely than those who have, to have participated in outdoor activities in Aroostook County (75%; 15 of 20\* vs. 34%; 15 of 44\*), Baxter State Park/ Katahdin (75%; 15 of 20\* vs. 34% 15 of 44\*) and the Western Maine Mountains (25%; 5 of 20\* vs. 5%; 2 of 44\*).

**Regions for Activities in Maine, Past 3 Years**

Base: Those Providing a Response (n=68)



\*Caution, small base (n<50); use for directional purposes only

> Q2. In what regions of Maine have you participated in the activities you mentioned during the last three years? (Aided, multiple response)



# Conclusions

# Conclusions

- More than one-half of respondents use at least one of four lakes in the Study Area more than just rarely. More than one-third of respondents use at least one of the other four lakes more than just rarely.
- Those who use the Study Area, participate in a variety of outdoor activities, including fishing (66%; 29 of 44\*), ATV riding (59%; 26 of 44\*), and motor boating (52%; 23 of 44\*).
- Four-fifths (89%; 39 of 44\*) of those who use the Study Area never hire a guide or local expert.
- Only five percent (5%; 2 of 40\*) of those who use the Study Area indicated that seeing a wind farm would have a negative effect on enjoyment of outdoor activities on and around these lakes.
  - A negative effect on enjoyment is more likely from paper mills (30%; 12 of 40\*), as well as dams or hydro power facilities (20%; 8 of 39\*), lake drawdowns (20% 8 of 38\*), and second home developments (20%; 8 of 39\*)\*\*.
  - One-half (50%; 20 of 40\*) indicated that seeing a wind farm would make them more likely to return to the region for outdoor activities in the future. Less than one-tenth (8%; 3 of 40\*) reported that this would make them less likely to return to the region.
- Nearly three-quarters of respondents (72%) support wind energy development in Maine.

\*Caution, small base (n<50); use for directional purposes only

\*\*Note that due to the small sample size, 8 of 39 could be 20% or 21% depending on the rounding required. This does not impact the findings.

# Respondent Profile

# Respondent Profile

- Two-thirds of respondents (66%) belong to the Maine Snowmobile Association. Most of the outdoor organizations respondents belong to concern outdoor activities, rather than conservation.
- Three-quarters (75%) are 45 years of age or older, with few people under the age of 25 (1%).
- Most respondents (88%) are Maine residents, and the average length of residency is 39.9 years.
- More than two-fifths (44%) report owning a second home or camp. Of these, more than one-third (36%) reside within 30 miles of their second home.
- Only five respondents are neither Maine residents nor owners of a second home in Maine.
  - Of these, the average number of years visiting the state is 29.



# Demographics

	<b>Total</b>
<b>Outdoor/ Conservation Organizations</b>	<b>(n=64)</b>
Maine Snowmobile Association	66%
Alliance of Trail Vehicles of Maine	14%
Sportsman's Alliance of Maine	9%
The Nature Conservancy	5%
Appalachian Mountain Club (A.M.C.)	2%
Dept. of Conservation	2%
National Rifle Association	2%
Dwinal Pond 4 Seasons Club	2%
Lincoln Snowhounds	2%
Prefer not to answer	22%
<b>Primary Residence Location</b>	<b>(n=65)</b>
In Maine	88%
Outside of Maine	9%
Prefer not to answer	3%

	<b>Total</b>
<b>Length of Maine Residency (years)</b>	<b>(n=53)</b>
1-10	11%
11-20	8%
21-30	15%
31-40	19%
41-50	10%
51-60	28%
Over 60	9%
<b>Own Second Home/ Camp in Maine</b>	<b>(n=64)</b>
Yes	44%
No	53%
Refused/ Don't Know	3%
<b>Location of Second Home/ Camp</b>	<b>(n=28*)</b>
0-30 miles from primary residence	36%
31 miles or more from primary residence	32%
Prefer not to answer	32%

	<b>Total</b>
<b>Years Visiting Maine (if no primary or secondary home in Maine)</b>	<b>(n=5*)</b>
11-20	40%
21-30	20%
31-40	40%
<b>Age</b>	<b>(n=66)</b>
18 to 24	1%
25 to 34	11%
35 to 44	12%
45 to 54	32%
55 to 64	32%
65 to 74	9%
75 or older	2%
Prefer not to answer	1%
<b>Gender</b>	<b>(n=64)</b>
Male	64%
Female	36%

\*Caution, small base (n<50); use for directional purposes only



# Appendix A: Additional Data

# Appendix A: Additional Data

**Q1. Including snowmobiling, what outdoor activities, if any, have you participated in within the State of Maine during the last three years?**

Participation in Outdoor Activities in Maine, Past 3 Years	
Base: Those Providing a Response (n=69)	
Horseback riding	3%
Sailing	1%
Leaf peeping	1%
Ice fishing	1%

# Appendix B: Questionnaire



### First Wind Stetson Snowmobiler Questionnaire

#### Introduction

Thank you for taking the time to participate in this research. First Wind certainly appreciates obtaining feedback from people who visit this area to participate in outdoor activities. Portland Research Group, an independent market research firm located in Maine has been commissioned to conduct this research to make sure all opinions shared remain strictly confidential. Your responses will be reported only in total with those of other participants. Thank you again for participating and we hope you are enjoying a great day of snowmobiling!

1. Including snowmobiling, what outdoor activities, if any, have you participated in within the State of Maine during the last **three years**? (Please check all that apply.)

- |   |  |  |
|---|--|--|
| <input type="checkbox"/> <sub>01</sub> ATV Riding           | <input type="checkbox"/> <sub>07</sub> Fishing                       | <input type="checkbox"/> <sub>13</sub> Swimming                          |
| <input type="checkbox"/> <sub>02</sub> Bicycling            | <input type="checkbox"/> <sub>08</sub> Hiking or Walking             | <input type="checkbox"/> <sub>14</sub> Sports (Team, Tennis, Golf, Etc.) |
| <input type="checkbox"/> <sub>03</sub> Birding              | <input type="checkbox"/> <sub>09</sub> Hunting                       | <input type="checkbox"/> Other (Please Specify): _____                   |
| <input type="checkbox"/> <sub>04</sub> Boating (Motor)      | <input type="checkbox"/> <sub>10</sub> Skiing – Cross Country/Nordic | <input type="checkbox"/> <sub>20</sub> None                              |
| <input type="checkbox"/> <sub>05</sub> Camping              | <input type="checkbox"/> <sub>11</sub> Skiing – Downhill/Alpine      | <input type="checkbox"/> <sub>29</sub> Prefer not to answer              |
| <input type="checkbox"/> <sub>06</sub> Canoeing or Kayaking | <input type="checkbox"/> <sub>12</sub> Snowmobiling                  |  |

2. In what regions of Maine have you participated in the activities you mentioned during the last **three years**? (Please check all that apply.)

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> <sub>01</sub> Acadia National Park         | <input type="checkbox"/> <sub>06</sub> Camden Hills                      | <input type="checkbox"/> Other (Please Specify): _____      |
| <input type="checkbox"/> <sub>02</sub> Allagash Wilderness Waterway | <input type="checkbox"/> <sub>07</sub> Grand Lakes Region/Downeast Lakes |   |
| <input type="checkbox"/> <sub>03</sub> Aroostook County             | <input type="checkbox"/> <sub>08</sub> Moosehead Lake Region             | <input type="checkbox"/> <sub>21</sub> All Over Maine       |
| <input type="checkbox"/> <sub>04</sub> Baxter State Park/Katahdin   | <input type="checkbox"/> <sub>09</sub> Sebago Lake Region                | <input type="checkbox"/> <sub>28</sub> Prefer not to answer |
| <input type="checkbox"/> <sub>05</sub> Belgrade Lakes               | <input type="checkbox"/> <sub>10</sub> Western Maine Mountains           |   |

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3. Please read the list of lakes located near here, just south of the Springfield area off Route 6. You may have heard of lakes with the same or similar names in other parts of Maine. All of the lakes mentioned below are located in either Washington or Penobscot counties. For each lake please indicate how often you participate in the outdoor activities you mentioned earlier, either on or beside the lake. (For each lake please circle one number, using a ten-point scale where 1 means "Never" and 10 means "Regularly" to indicate your response. Please circle "90" if you are not aware of the lake mentioned.)

Lakes	Never	Regularly	Not Aware
a. Bottle Lake in Lakeville	1 2 3	4 5 6 7 8 9 10	90
b. Duck Lake in Lakeville	1 2 3	4 5 6 7 8 9 10	90
c. Lower Sysladobsis (Sys-la-DOB-sis) Lake in Lakeville	1 2 3	4 5 6 7 8 9 10	90
d. Keg Lake in Lakeville	1 2 3	4 5 6 7 8 9 10	90
e. Junior Lake in Pukakon	1 2 3	4 5 6 7 8 9 10	90
f. Scraggley Lake near Junior Lake in Pukakon	1 2 3	4 5 6 7 8 9 10	90
g. Shaw Lake, between Pleasant and Scraggley Lakes, in Pukakon	1 2 3	4 5 6 7 8 9 10	90
h. Pleasant Lake in Kossuth Township	1 2 3	4 5 6 7 8 9 10	90

IF RATING OF 4 – 10 FOR AT LEAST ONE LAKE CONTINUE ELSE, SKIP TO QUESTION 13

4. What outdoor activity have you participated in most frequently on or beside one of the lakes listed in question 3? (Please check only one.)

- |  |  |  |
|--|--|--|
| <input type="checkbox"/> <sub>01</sub> ATV Riding      | <input type="checkbox"/> <sub>06</sub> Canoeing or Kayaking          | <input type="checkbox"/> <sub>11</sub> Skiing – Downhill/Alpine          |
| <input type="checkbox"/> <sub>02</sub> Bicycling       | <input type="checkbox"/> <sub>07</sub> Fishing                       | <input type="checkbox"/> <sub>12</sub> Snowmobiling                      |
| <input type="checkbox"/> <sub>03</sub> Birding         | <input type="checkbox"/> <sub>08</sub> Hiking or Walking             | <input type="checkbox"/> <sub>13</sub> Swimming                          |
| <input type="checkbox"/> <sub>04</sub> Boating (Motor) | <input type="checkbox"/> <sub>09</sub> Hunting                       | <input type="checkbox"/> <sub>14</sub> Sports (Team, Tennis, Golf, Etc.) |
| <input type="checkbox"/> <sub>05</sub> Camping         | <input type="checkbox"/> <sub>10</sub> Skiing – Cross Country/Nordic |  |
| <input type="checkbox"/> Other (Please Specify): _____ |  |  |

5. The next group of questions will refer to your experiences on or beside one of the lakes mentioned in question 3. When you participate in the outdoor activity you identified in question 4 on or beside those lakes, how often do you use guides or hire local experts? Would you say... (Please check only one.)

- |   |   |  |
|---|---|--|
| <input type="checkbox"/> <sub>1</sub> Always,           | <input type="checkbox"/> <sub>2</sub> Some of the time, | <input type="checkbox"/> <sub>3</sub> Never                |
| <input type="checkbox"/> <sub>4</sub> Most of the time, | <input type="checkbox"/> <sub>5</sub> Rarely, or        | <input type="checkbox"/> <sub>6</sub> Prefer not to answer |

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6. At what types of lodging do you typically spend the night when you participate in your most frequent outdoor activity on or beside one of the lakes listed previously? (Please check all that apply.)

- 01: Your Primary Residence     04: Bed & Breakfast/Inn/ Sporting Lodge/Hunting Lodge     07: State Park/Campground
- 02: Your Second/Vacation Home/Condo     05: Hotel or Motel     08: Private Campground or RV Park
- 03: Home Of Family/Relative/ Friend     06: Rental Home/Condo/ Timeshare     09: Prefer not to answer
- Other (Please Specify): \_\_\_\_\_

7. In what seasons are you typically participating in your most frequent outdoor activity on or beside one of these lakes? (Please check all that apply.)

- 1: Winter, consisting of December, January, and February     3: Summer, consisting of June, July and August
- 2: Spring, consisting of March, April and May     4: Fall, consisting of September, October and November
- 5: Prefer not to answer

8. On average, about how many days a year do you spend participating in your most frequent outdoor activity on or beside one of these lakes?

Average Number of Days per Year at one of these lakes: \_\_\_\_\_

9. How unlikely or likely do you expect to see the following while participating in your most frequent outdoor activity specifically on or beside one of these lakes? (For each item please circle one number, using a ten-point scale where 1 means, "Very Unlikely" and 10 means "Very Likely" to indicate your response.)

	Very Unlikely										Very Likely			
a. Recreational Resorts (Ski, Golf, etc.)	1	2	3	4	5	6	7	8	9	10				
b. Snowmobile/ATV Trails	1	2	3	4	5	6	7	8	9	10				
c. Energy facilities such as wind farms	1	2	3	4	5	6	7	8	9	10				
d. Cut over forest lands	1	2	3	4	5	6	7	8	9	10				
e. Electrical transmission lines	1	2	3	4	5	6	7	8	9	10				
f. Second home developments	1	2	3	4	5	6	7	8	9	10				
g. Town Centers	1	2	3	4	5	6	7	8	9	10				
h. Communications Towers	1	2	3	4	5	6	7	8	9	10				
i. Industrial facilities such as paper mills	1	2	3	4	5	6	7	8	9	10				
j. Logging roads	1	2	3	4	5	6	7	8	9	10				
k. Lake drawdowns	1	2	3	4	5	6	7	8	9	10				
l. Dam or Hydro Power Facility	1	2	3	4	5	6	7	8	9	10				

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10. Please rate how your overall enjoyment would be affected, if at all, if you saw the following while participating in your most frequent outdoor activity specifically on or beside one of these lakes. (For each item please circle one number, using a ten-point scale where 1 means, "Very Negative Effect" and 10 means "Very Positive Effect" to indicate your response.)

	Very Negative Effect					Very Positive Effect				
a. Recreational Resorts (Ski, Golf, etc.)	1	2	3	4	5	6	7	8	9	10
b. Snowmobile/ATV Trails	1	2	3	4	5	6	7	8	9	10
c. Energy facilities such as wind farms	1	2	3	4	5	6	7	8	9	10
d. Cut over forest lands	1	2	3	4	5	6	7	8	9	10
e. Electrical transmission lines	1	2	3	4	5	6	7	8	9	10
f. Second home developments	1	2	3	4	5	6	7	8	9	10
g. Town Centers	1	2	3	4	5	6	7	8	9	10
h. Communications Towers	1	2	3	4	5	6	7	8	9	10
i. Industrial facilities such as paper mills	1	2	3	4	5	6	7	8	9	10
j. Logging roads	1	2	3	4	5	6	7	8	9	10
k. Lake drawdowns	1	2	3	4	5	6	7	8	9	10
l. Dam or Hydro Power Facility	1	2	3	4	5	6	7	8	9	10

11. What is the likelihood of your personally returning to these lakes to participate in your most frequent outdoor activity if you saw the following while participating in that activity, either on or beside one of these lakes? (For each item please circle one number, using a ten-point scale where 1 means you are "Much Less Likely" and 10 means you are "Much More Likely.")

	Much Less Likely					Much More Likely				
a. Recreational Resorts (Ski, Golf, etc.)	1	2	3	4	5	6	7	8	9	10
b. Snowmobile/ATV Trails	1	2	3	4	5	6	7	8	9	10
c. Energy facilities such as wind farms	1	2	3	4	5	6	7	8	9	10
d. Cut over forest lands	1	2	3	4	5	6	7	8	9	10
e. Electrical transmission lines	1	2	3	4	5	6	7	8	9	10
f. Second home developments	1	2	3	4	5	6	7	8	9	10
g. Town Centers	1	2	3	4	5	6	7	8	9	10
h. Communications Towers	1	2	3	4	5	6	7	8	9	10
i. Industrial facilities such as paper mills	1	2	3	4	5	6	7	8	9	10
j. Logging roads	1	2	3	4	5	6	7	8	9	10
k. Lake drawdowns	1	2	3	4	5	6	7	8	9	10
l. Dam or Hydro Power Facility	1	2	3	4	5	6	7	8	9	10

12. If you went to these lakes to participate in your most frequent outdoor activity and saw evidence of a project or something else that caused you not to want to return, is there another lake, region or location in Maine you could go to and enjoy the same outdoor activity equally as much or more?

- 1: Yes     3: Prefer not to answer
- 2: No     4: Don't Know

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13. To what extent do you not support or support commercial-scale wind energy development in Maine? (Please circle one number, using a ten-point scale where 1 means, "Do Not Support At All" and 10 means, "Completely Support.")

<u>Do Not Support at All</u>				<u>Completely Support</u>				<u>Prefer not to answer</u>		<u>Don't Know</u>	
01	02	03	04	05	06	07	08	09	10	98	99

14. The remaining classification questions help us to develop an overall respondent profile, but will not identify you in any way. What, if any, outdoor or conservation organizations do you belong to? (Please check all that apply.)

- 01 Alliance of Trail Vehicles of Maine
- 02 Appalachian Mountain Club (A.M.C.)
- 03 Appalachian Trail Conservancy (A.T.C.)
- 04 Maine Audubon Society
- 05 Maine Snowmobile Association
- 06 Natural Resources Council of Maine
- 07 Sportsman's Alliance of Maine
- 08 The Nature Conservancy
  
- Other (Please Specify): \_\_\_\_\_
- 99 Prefer not to answer

15. What is the 5-DIGIT zip code where your primary residence is located?

\_\_\_\_\_

**IF PRIMARY RESIDENCE IS NOT IN MAINE, PLEASE, SKIP TO QUESTION 17.**

16. For how many years has your primary residence been located in Maine?

YEARS: \_\_\_\_\_ MONTHS: \_\_\_\_\_

17. Do you own a second or vacation home or camp in Maine? (Please include any four season homes or condos, seasonal fishing/hunting/recreational camps and lakeshore camps.)

Yes       No       Prefer not to answer

**IF NO OR PREFER NOT TO ANSWER, PLEASE SKIP TO QUESTION 20.**

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18. What is the 5-DIGIT zip code where your second home in Maine is located?

\_\_\_\_\_

**IF EITHER YOUR PRIMARY RESIDENCE AND/ OR SECOND HOME ARE IN MAINE, PLEASE SKIP TO QUESTION 20.**

19. For how many years have you been visiting Maine to participate in the outdoor activities we have been discussing?

YEARS: \_\_\_\_\_ MONTHS: \_\_\_\_\_

20. Into which of the following ranges does your age fall?

18 to 24,       35 to 44,       55 to 64,       75 or older  
 25 to 34,       45 to 54,       65 to 74, or       Prefer not to answer

21. What is your gender?

Male       Female

**Additional Comments:**

**THANK YOU VERY MUCH FOR YOUR TIME! ENJOY THE SNOW TODAY!!**

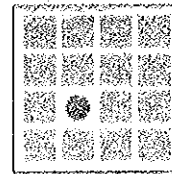
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Portland  
Research  
Group

May 23, 2011

Response by Portland Research Group to the "Review of the Bowers Wind Project Visual Impact Assessment" by James F. Palmer, dated April 28, 2011

Focus: Outdoor Activities Users Research (Telephone Survey and Snowmobiler Survey)

### Telephone Survey

*Dr. Palmer correctly states on page 10 that "The sample is not random. The original list only includes people who engage in outdoor activities and the actual size of this population is unknown. There are also other restrictions to eligibility. Then a "booster" sample of local residents was merged with the New England group. As a result, the survey cannot be used to estimate the "extent, nature and duration of potential affected public uses" of the area." Dr. Palmer makes similar points on page 33.*

The sample frame was constructed intentionally due to our hypothesis that only a very small portion of the general population would be aware of and regularly use the Study Area. As such, we targeted individuals who participate in the kinds of outdoor activities that one can do in the Study Area. Since many of the users of the outdoor resources in Maine come from outside the State, primarily from other New England States, we felt it prudent to draw sample for each New England State. Then, to make sure we captured the opinions of those who live in fairly close proximity to the Study Area, we garnered a "booster sample" (primary residence located within 50 miles of Study Area) from which we hoped to complete n=50 interviews. We felt the combination of the two samples would give us results, through a greater number of observations, in which we could place greater confidence. Details of the research objectives, sampling plan and screening criteria follow:

- Research Objectives

- Measure awareness of Study Area
- Measure frequency of usage of Study Area
- Understand expectations for views in the Study Area
- Determine impact of "human-made" structures on users of Study Area in terms of likelihood to return and enjoyment
- Assess whether and how commercial wind power projects fit within expectations of viewers using the Study Area and other parts of Maine for outdoor activities

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- Sampling Plan

- Identified individuals from InfoUSA (a well known, reputable sample provider for the market research industry) panel from New England region who participate in boating/sailing, camping/hiking, fishing, hunting and other outdoor sporting interests.
- 505,675 matches occurred, of which 5,000 records were pulled. 1,000 records from Maine and 800 from each of the other New England states were randomly selected to form the sample from which calls were made for the research: Maine (1,000 of 80,759), New Hampshire (800 of 71,342), Vermont (800 of 29,750), Massachusetts (800 of 29,696), Rhode Island (800 of 51,256) and Connecticut (800 of 242,782).
- An additional 1,000 records were taken to identify Maine residents who lived within 50 miles of the Study Area.
- Encountering disconnected telephone numbers, computer tones, language barriers, etc. is all normal for a typical research project using telephones as the data collection methodology.

- Screening Criteria

- Eighteen years of age or older (typical for phone study unless parents/guardians are involved to grant permission to speak with youth)
- Respondent personally participated in outdoor activities in Maine within the last three years
- Gender to obtain representation of both males and females
- Specific outdoor activities must mention (unaided), among others, at least one of: ATV Riding, Birding, Boating (Motor), Camping, Canoeing or Kayaking, Fishing, Foraging for Wild Plants or Mushrooms, Hiking or Walking, Hunting, Skiing (Cross Country/Nordic), Snowmobiling, Snowshoeing.

Portland Research Group's hypothesis going into the research proved to be correct. As shown below, just 3.06% of those contacted were aware of and at least sometimes (within the last three years) participate in an outdoor on or beside one of the eight lakes located within the Study Area. Had we conducted a purely random sample using a Random Digit Dial (RDD) sample and achieved the same incidence of 3.06%, we would have interviewed just 12 people from a sample of n=400 and 18 from a sample of n=600 who use the area. Instead, we were able to interview 31 people who were aware and had used the Study Area. This is more than double the quantity for a random sample of n=400 and almost twice as many as we would have interviewed as part of a random sample of n=600. The effect of our approach was to increase information from people who actually are aware of and use the area, which was an important part of the survey's purpose.

- Summation of Sampling and Screening

- Due to our hypothesis, we did everything we could to target a sample of users of the Study Area. We tried to complete n=50 interviews with people who are aware of and at least sometimes (rating of 4 to 10 on a scale where 1 means, "Never participate in the outdoor activity on or around the lake", and 10 means, "Regularly participate in the outdoor activity on or around the lake") use at least one of eight lakes located within the Study Area: Bottle, Duck, Lower Sysladobsjs, Keg, Junlor, Scraggley, Shaw, and Pleasant (locations defined in survey). We completed 31 of our target of 50.
- Had we conducted a purely random sample of Mainers (using a RDD – Random Digit Dial and a cell phone number overlay sample), awareness and usage of the Study Area would have been a very small percentage of the total sample and would not have given us enough of the target segment to ask about expectations, impact on enjoyment and impact on likelihood to return. Based on this targeted sample the percent is still small of those who participate in outdoor activities on or beside the lakes in the Study Area:
  - ✓ Not participated in activities in Maine last 3 years: 408
  - ✓ Not engaged in activities around Study Area: 55
  - ✓ Unaware or rarely uses Study Area (Over quota): 360
  - ✓ Interviews among those unaware or rarely use Study Area: 160
  - ✓ Aware and use Study area at least sometimes: 31
  - ✓  $31/(408+55+360+160+31) = 3.06\%$
- With a targeted sample, only 3.06% are aware of and sometimes use the Study Area. This incidence of awareness and usage would have been substantially lower with a purely random sample.
- While the outdoor activity usage levels by age do not line-up with SCORP data in terms of Fishing and Hiking or Walking, the statement can be made based on the research that the Study Area garners very low awareness and usage.

*Dr. Palmer states on page 10, "The number of people between 18 and 44 years old are significantly under represented compared to those who are 45 years old and older." Age ranges from the survey are compared to Maine's SCORP for the two most commonly reported activities from the survey: fishing and hiking or walking.*

The comparison correctly demonstrates that the survey is comprised of older respondents than those included in the Maine SCORP data. The data presented in the 2009 SCORP was analyzed based on a national survey of recreational activity conducted between 2002 and 2009. However, as shown in the table at the end of this document, the opinions shared regarding expectations, enjoyment, likelihood to return and disposition on wind power are very consistent with those shared by respondents from other studies independent of this work. Such consistency between independent studies enhances the reliability of the work.

*On page 10 Dr. Palmer correctly points out that "Seeing wind turbines would affect the enjoyment of 48% negatively (rating 1-3) and 16% positively (rating 8-10)."*

As indicated on page 18 of the Telephone Research report, 36% gave neutral ratings (4-7) indicating that seeing wind farms would have no effect on their enjoyment. Another way to express the findings to this question is 52% (just over half) indicated that seeing wind farms would have a positive impact or no impact on their enjoyment.

*Dr. Palmer also points out on page 10 that "Seeing wind turbines would affect the likelihood of their returning for 32% negatively (rating 1-3) and 23% positively (rating 8-10)."*

These facts are correct about the effect of seeing wind turbines on likelihood of returning is negative (1-3 rating) for 32% and positive for 23% (8-10). However, referencing page 19 of the Telephone Research Report, 45% indicated seeing wind farms would have no impact (rating of 4-7) on their likelihood of returning. In other words, two-thirds (68%) said seeing wind farms would have either no impact (45%) or a positive impact (23%) on their likelihood of returning to the Study Area for outdoor activities.

*On Page 11 of the Review of the Bowers Wind Project Visual Impact Assessment, Dr. Palmer states, "Without a clear understanding of the visual scope and scale of the turbines, it is difficult to see how respondents can accurately determine how the turbines would affect their 'continued use and enjoyment of the scenic resource.'" On Page 33, Dr. Palmer again notes that without use of photo simulations "It is therefore highly unlikely that [the respondents] could have an accurate mental image of the "scope and sale" of the turbines . . . Without this, how could anyone give an accurate response to questions about how the project's scenic impact might affect their enjoyment and likelihood to return."*

True, respondents did not see photo simulations from the numerous vantage points to specifically assess the visual impact of the Bowers project. However, on page 20 of the Telephone Research Report, we see that 97% (30 of 31) who are aware and use the Study Area have seen wind turbines in Maine (94%; 29 of 31) and/or outside of Maine (58%; 18 of 31). Therefore, while not an exact idea, one can say that respondents familiar with the Study Area have general understanding of the visual scope – It would be a much different conclusion if just a small percentage of these respondents had previously seen wind turbines.

As stated previously, when compared to the results of several other independent research studies, the results are very consistent. While each Study Area for wind turbines is unique, the results from these other studies show remarkable consistency toward the disposition of commercial wind farm development. Please refer to Table 1 for a summary of these results.

### Stetson Snowmobiler Survey

*Dr. Palmer states on page 11 of the Bowers VIA Review a statement is made in the second paragraph under the heading "Snowmobiler survey": "Therefore the respondents are primarily a self-selected group that is willing to at least tolerate the presence of grid-scale wind turbines." The paragraph continues by questioning what can be said about how "typical" snowmobilers might experience wind turbines. Dr. Palmer raises similar concerns on page 33 of his report.*

While this may be a true statement, one can also make the point that the snowmobilers are more representative of the snowmobiler segment than the paragraph implies:

- Curiosity likely influenced many snowmobilers to attend the gathering – curiosity rather than tolerance.
- On pages 32 and 33 of the Bowers VIA Review, an Associated Press (2011) news release about the gathering has been reprinted. The news release clearly states that there will be a barbecue lunch, which is an incentive to attend. In market research, we offer incentives for two reasons: improve cooperation to broaden the representation of a sample and to increase the speed of receiving results. The offer of a "barbecue lunch reception" likely acted like an incentive to broaden the "types" of snowmobilers who attended.
- Several factors point to the fact that the snowmobiler respondents could in fact represent typical users of the Study Area.
  - Snowmobilers from the research (see page 13 of the Snowmobiler Research Report) reported spending an average of 62 days (median of 30 days) participating in outdoor activities in the Study Area. As a result, they probably know the area well.
  - Fishing (81%) in Maine within the past three years is almost as prevalent among these respondents as snowmobiling (84%). (See page 19 of the Snowmobiler Research Report)
  - The majority of these respondents engage in outdoor activities in the Study Area throughout the year (See page 12 of the Snowmobiler Research Report): Winter (80%), Spring (55%), Summer (91%), and Fall (64%).
  - The demographic profile of respondents shown on page 25 of the Snowmobiler Research Report reveals a group of respondents with a good spread of years living in Maine. In addition, there is good representation of second home ownership in Maine, all age groups except 18 to 24, and gender. Not surprisingly, the sample is skewed towards membership in the Maine Snowmobile Association (66%) and people with their primary residence located in Maine (88%). Both of these facts are not surprising and do not undermine the sample as being comprised of people willing to tolerate wind turbines.

*Dr. Palmer comments on page 33 that, "I do not see what role this survey can play as a responsible decision making tool."*

The Stetson Snowmobiler Survey produced results consistent with other studies related to wind power development and offers another data point for purposes of comparison, as snowmobiling is a type of recreation use that has not been included in previous user intercept surveys that have focused primarily on hiking or shore-based water activities. When independent surveys show consistency, one can typically place greater confidence in the reliability of the results. Please see the table at the end of this document.

### Comparison of Results from Several Independent Studies in Maine

Portland Research Group reviewed the results of seven wind development-related public opinion projects conducted independently of each other in 2010 and 2011 and documented consistency across three important metrics: impact of wind energy facilities on enjoyment, likelihood of returning to area if a wind facility is seen, and disposition toward commercial-scale wind energy development in Maine.

Across each of the studies the majority of respondents was either in the positive/support or neutral/no change ranges. A higher percentage of respondents from the Stetson Snowmobiler Study than the Bowers Outdoor Users Activities Study and Highland Hikers Study indicated an expectation of seeing wind farm facilities within the region addressed in the survey. This is not surprising since the snowmobilers were surveyed at the Stetson wind facility. (Please refer to Table 1 at the end of this document)

Since the results from the two studies referenced in the Bowers Wind Project Visual Assessment corroborate with results from other independent studies, one can feel much more confident that the views shared are representative.

- A few notes on the studies:
  - Portland Research Group used a ten-point scale and Market Decisions used a seven-point scale. In the Market Decisions Reports, a score of 4 represented no effect. For comparison the following breaks were used: 8-10 vs. 5-7; 4-7 vs. 4; 1-3 vs. 1-3.
  - Enjoyment and likelihood to return ratings were facilitated through the use of photo simulations for the intercept studies.
  - Some of the question wording differed slightly, although the content of the questions remained consistent.

**Table 1. Comparison of Results of Independent User Surveys at Proposed Wind Projects in Maine**

Study:	Snowmobiler	Outdoor Activities	Bull Hill	Little Bigelow	Hikers Study	Mt. Blue	Spruce Mountain
<b>Wind Project:</b>	Bowers	Bowers	Bull Hill	Highland Wind	Highland Wind	Saddleback Ridge	Spruce Mountain
<b>Sponsor:</b>	Champlain	Champlain	Blue Sky East	Highland Wind	Highland Wind	Patriot Renewables	Spruce Mtn. Wind
<b>Completed by:</b>	Portland Research Group	Portland Research Group	Market Decisions	Portland Research Group	Portland Research Group	Market Decisions	Market Decisions
<b>Location:</b>	Stetson Wind Farm	New England/50 mile radius	Donnell Pond Black Mountain	Bigelow Preserve	Northern New England/E. MA.	Mt. Blue	Bald Mountain
<b>Date:</b>	February 2011	January 2011	October 2010	Summer/Fall 2010	August 2010	September 2010	May 2010
<b>Methodology:</b>	Intercepts	Telephone	Intercepts	Intercepts	Web	Intercepts	Intercepts
<b>Sample Size:</b>	n=69	n=191	n=81	n=58	n=304	n=22	n=15
<b>Expectations of seeing energy facilities such as wind farms</b>							
	n=39	n=31	Not Asked	Not Asked	n=304	Not Asked	Not Asked
Likely	38%	10%			7%		
Neutral	49%	29%			58%		
Unlikely	13%	61%			35%		
<b>Employment - Impact of seeing energy facilities such as wind farms on employment<sup>1</sup></b>							
	n=40	n=31	n=?	n=37	n=304	n=22	n=15
Positive	50%	16%	9%	8%	21%	23%	20%
Neutral	45%	36%	45%	73%	61%	45%	47%
Negative	5%	48%	47%	19%	18%	32%	27%
Refused	0%	0%	0%	0%	0%	0%	7%

<sup>1</sup> Due to fractional rounding, the Bull Hill and Spruce Mountain results total 101%.

Likelihood of returning if respondent saw energy facilities such as wind farms							
	n=40	n=31	n=?	n=37	n=304	n=22	n=15
More Likely	50%	23%	6%	14%	15%	27%	13%
No Change	42%	45%	75%	73%	68%	50%	73%
Less Likely	8%	32%	20%	14%	17%	23%	7%
Refused	0%	0%	0%	0%	0%	0%	7%
Disposition toward commercial-scale wind energy development in Maine							
	n=64	n=191	n=?	n=58	n=304	n=22	n=15
Support	72%	52%	74%	38%	63%	77%	87%
Neutral/ Don't Know	25%	33%	12%	43%	33%	18%	13%
Oppose	0%	13%	14%	17%	4%	5%	0%
Refused	3%	2%	0%	2%	0%	0%	0%



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Sample Size:	n=69	n=191	n=81	n=58	n=304	n=22	n=15
<b>Expectations of seeing energy facilities such as wind farms</b>							
	n=39	n=31	Not Asked	Not Asked	n=304	Not Asked	Not Asked
Likely	38%	10%			7%		
Neutral	49%	29%			58%		
Unlikely	13%	61%			35%		
<b>Enjoyment – Impact of seeing energy facilities such as wind farms on enjoyment</b>							
	n=40	n=31	n=?	n=37	n=304	n=22	n=15
Positive	50%	16%	9%	8%	21%	23%	20%
Neutral	45%	36%	45%	73%	61%	45%	47%
Negative	5%	48%	47%	19%	18%	32%	27%
Refused	0%	0%	0%	0%	0%	0%	7%

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Refused	3%	2%	0%	2%	0%	0%	0%