



Workforce and Business Attraction Research

*Report of Findings From Focus Groups With
Consumers, Employers, and Recent Movers to Maine*



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Introduction

BACKGROUND AND KEY FINDINGS

About This Research

Maine's Department of Economic and Community Development (DECD) would like to broaden the state's tax base by attracting new households and businesses. In order to do this, the department plans to develop a strategy that will guide future efforts to:

- Attract new residents to supplement the size of its workforce;
- Attract new businesses to provide additional career opportunities for residents; and
- Enhance the education and training for current residents to ensure they have the job skills and knowledge necessary to support a mix of industries.

To help it achieve these goals, the DECD contracted dpa to conduct a comprehensive program of research that would:

- Clarify the issues facing the state in attracting businesses and workers, in particular how people outside the state view Maine and what their perceptions are based on;
- Identify the best prospects for relocation or business expansion to the state (including geography, demographics, and psychographics);
- Show how best to reach these audiences through media channels and messages; and
- Suggest ways to overcome any barriers to moving a household or business to the state.

This research program entails three phases:

- Phase I: Exploratory Consulting (stakeholder and business-leader discussions, secondary data collection and analysis);
- Phase II: Qualitative Research (focus groups with recent movers to Maine, as well as consumers and employers outside the state); and
- Phase III: Quantitative Research (an online survey).

The information obtained from Phase I informed the qualitative focus group discussions included in Phase II (the results of which are described here). The ideas and topics generated from the first two phases of the research will then be quantified in Phase III through an online survey of consumers.

About This Report

This report presents the results of Phase II of this broader research program, focusing on the key themes and findings from a series of 15 focus group discussions.

These discussions were designed to facilitate a deep and intensive examination of views toward Maine, its people, and its business environment; to measure the strength and clarity of these views; and to understand the sources of these views. The groups were also designed to gauge receptiveness to moving to Maine, and probe what underlies that; to identify the issues respondents would consider when relocating; and to suggest how residents of other markets could be convinced to consider moving their household or business to Maine.

Some of the broad topics covered in the discussions included:

- What people know about Maine, or knew about it prior to relocating to the state;
- How they would describe the state, and why;
- What type of people they picture living in the state;
- What businesses or industries are present in Maine;
- What the 'ideal' state for their household or business would look like, how that is different from where they live now, and how Maine compares to that ideal state;
- What information they would need to know if they were considering relocating to another area, and where they would turn to find that information;
- What made them consider moving to Maine, or what might make them consider moving their household or business to another state in general and to Maine in particular; and
- What themes and images would resonate most in messaging designed to encourage people to consider relocating to Maine, and where those messages should be placed.

This document is intended to be a distillation of the most salient conclusions from the research related to perceptions of Maine, the attributes that create an ideal place to live, and how Maine compares to that ideal. Information from other topics covered in these focus group discussions will be included, as necessary, in a final report from this research.

About This Report (cont.)

The fifteen focus group discussions conducted for this research were held in Maine and three out-of-state markets.

- The Maine-based focus groups included only participants who were 'recent movers' to the state. Two groups were held with this population in Portland, and one group was held in Bangor.
 - These groups included full-time residents who were under 55 years of age, make financial and other decisions in their household, and had moved to the state within the past ten years.
- The focus groups were also held in Boston, Massachusetts; Baltimore, Maryland; and Minneapolis, Minnesota. Within each of these markets, two groups included those who own or run a business (referred to as 'employers' in this report) and two groups were held with area residents who do not run a business (referred to as 'consumers').
 - Business owners were screened to ensure they owned or led a business with 2 to 50 employees; that they would be willing to consider doing business in another state; and that they would play the sole or deciding role in a business decision to relocate or expand to another market.
 - Consumers were screened to ensure they were between the ages of 25 and 55, have graduated from college, were employed, have household incomes of at least \$50,000, were decision-makers in their household, and were willing to consider moving to another state.

Each group lasted for two hours and included between eight and twelve people.

Key Findings

- Few outside the Northeast appear to have any concrete knowledge of Maine, so it is generally not top-of-mind as a place to live or run a business.
- Despite this low awareness, views towards Maine are generally positive.
- To the extent that consumers and employers outside of Maine have any well-defined perceptions of the state, Maine is broadly seen as:
 - Rural and sparsely-populated,
 - Remote,
 - Slow-paced and laid-back,
 - Beautiful,
 - Having residents who are kind, genuine, and hardy,
 - Demographically homogenous (with many older, white residents),
 - Having residents with relatively low levels of education,
 - Lacking industry and large companies, and
 - Less technologically advanced than other states.
- The rural component of Maine's image is pervasive and impacts perceptions of the state in many ways.

Key Findings

- When consumers and employers describe the ideal place to live, they most often mention improved quality of life marked by:
 - A favorable work/life balance,
 - Low cost of living,
 - Low crime,
 - Proximity to nature and the ocean,
 - Friendly people who welcome diversity,
 - Little traffic,
 - Strong personal relationships,
 - Easy access to other areas,
 - High-quality healthcare,
 - Quality education, and
 - Arts and culture, including nightlife, restaurants, and the arts.
- Additional qualities that employers would consider when deciding to relocate or expand to a new location include:
 - A large enough population to provide a sufficient customer base for their business,
 - Favorable tax climate and business environment for new businesses, and
 - A workforce with a strong work ethic.
- Increasing awareness of Maine and showing how the state can meet many lifestyle and workforce needs has the potential to attract both new businesses and workers.

Detailed Findings

PERCEPTIONS OF MAINE

Maine is also frequently described as 'rural,' 'beautiful' and 'cold.'

Employer, Minneapolis

Consumer, Boston

Employer, Minneapolis

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There Is A Distinct Lack of Media Coverage About Maine.

Probing beyond these surface-level perceptions of Maine, while productive, largely reveals little by way of nuanced familiarity with the state or its people. In other words, few have any firm or clear image of what it is like to live and run a business in Maine.

In large part, this can be attributed to a lack of media coverage of the state. The few who have seen references to Maine in any form of news or other media almost exclusively point to coverage of its political representatives.

"The people back in Ohio – most probably haven't heard of Maine." Recent Mover, Portland

"It's never in the news. Like, you never hear anything about Maine. So I don't know a lot about it."
Employer, Minneapolis

- At the time the research was being conducted, there was a heated national debate over healthcare legislation, and a few recall coverage of the state's senators and their critical votes in support of the Affordable Care Act. Generally, this coverage was positive in tone, as it reflected moderate political beliefs that are popular in these suburban environments. In addition, a senator voting in opposition to their party line supports the state's image as ruggedly independent.

"She [Senator Collins] is on the news a lot. She speaks her mind."

Employer, Minneapolis

"I think of Maine as independent-minded. They don't care much for what other people think of them. For example, their Republican senator is one of the few Republicans not supporting the healthcare bill. And she's a woman."

Consumer, Baltimore

In Massachusetts, a few recalled news coverage of the governor, which has been largely negative in tone. A couple others believe they may have heard media coverage of widespread drug usage in Maine, but broadly, this coverage did not imply that the issue impacted Maine more than other states.

"That's the only news I've heard about Maine in the last ten years – about the governor."

Consumer, Boston

"[I've heard there's an] opioid problem there – and everywhere."

Consumer, Boston

Some in Boston have seen advertisements for Maine as a travel destination. Very few recall seeing Maine in media lists that rank and profile 'top' locations on specific attributes.

In all markets, several also recall travel advertisements for California and Michigan.

Many Draw Broader Conclusions About Maine From its Rural Image.

One of the most pervasive aspects of Maine's image is that it is sparsely-populated and heavily-wooded. While many simply use the term 'rural' to describe it, less direct descriptions imply the same image; many consumers and employers associate 'flannel,' 'plaid' and 'lumberjacks' with Maine.

"Maine has an outdoors culture. An L.L.Bean culture."

Consumer, Boston

"A lumber jack is probably going to be very happy there."

Employer, Baltimore

"Blue collar. I picture people in plaid – men and women."

Consumer, Baltimore

This rural image suggests a lifestyle that, for a large majority, would be marked by less stress and fewer demands on their time. For these reasons, the state is often described – on the positive side – as 'simple,' 'having a slower pace of life,' or 'charming' and filled with a 'small-town' atmosphere. Those who find these qualities *less* positive tend to describe the state as 'boring,' 'slow,' or 'remote.'

"I hear Maine and I just think of cottages and a small-town feel, which I like. You can live life very simply, which I like."

Consumer, Minneapolis

"Maine is 'simple'; 'boring' is too harsh. There's one store, everything is very minimal. There's nothing extravagant happening there – you're just living your life."

Employer, Boston

"Isolated – it's one of the farthest areas away from the rest of the country. It probably takes 8 hours to get to Providence, Rhode Island."

Consumer, Minneapolis

Maine's rural atmosphere is also expected to be marked by welcoming people. Most would expect to find people who aren't as 'closed off' or wary of others as residents of more urban areas, and who are both more willing and able to form connections with others.

Recent movers to Maine almost universally report that other residents were very friendly and welcoming when they arrived.

Rarely do consumers, employers, or recent movers volunteer an image of Mainers who shun people who are 'from away.'

Nearly All Have a Positive Perception of Maine's People.

Consumers and business owners also commonly evoke images of a hardy and highly-independent populous in Maine that is able to cope with harsh landscape and weather; loneliness; and, according to some, a lack of modern conveniences. Most also expect a population that generally has lower levels of education.

"People in Maine are real Yankees – hard-working, salt of the earth."

Consumer, Boston

"You can't be a wimp in Maine, in that climate. And so there's a hardiness...and I think with that comes being hard working."

Employer, Minneapolis

"I'd say they'd be lesser-educated than what you have here."

Employer, Minneapolis

In keeping with the perceived slow pace of life in Maine, most expect the typical Mainer would likely be 'laid back' and less rushed than people in more urban areas. A couple believe this spirit is pervasive enough to create an even 'bohemian' atmosphere.

"It's very laid back. We went to a Dunkin' Donuts when I visited. There was no line, but the people behind the counter were working as slow as molasses and I'm getting antsy, like, why aren't they working faster? Why is it taking so long?"

Consumer, Boston

"It's definitely laid back...kind of rustic. They don't shave. They don't use perfume. They don't do their hair and stuff. They're just comfortable. It's bohemian. But not bohemian for an artsy sake. Just a hippy, down-to-earth lifestyle, It's just chill."

Consumer, Minneapolis

In fact, several of those who have recently moved to Maine support this view of the state, and recount a 'culture shock' where the fast-paced lifestyle they were used to in their former cities was stymied by the slower pace of life in Maine.

- This is almost always a welcome adjustment, however, as this slower pace of life is one of the most common and most important reasons recent movers to the state decided to move to Maine.

"The rhythm [is slower]. [From] walking [to] how people do their jobs...Everything is slower than where I came from."

Recent Mover, Portland

Most Assume the State Lacks Diversity.

The rural image of Maine also drives the widespread impression that its populace lacks diversity, being marked by older residents and ethnic homogeneity.

"You have more job prospects someplace that's larger. People who grow up in Maine typically go to Boston or New York."

Consumer, Boston

"I would expect the state to be one that young people want to leave – that older parents stay in and wait for their kids to come back to."

Employer, Baltimore

Many also believe that only a relatively small proportion of Mainers would be financially affluent, suggesting that year-round residents may struggle to make ends meet.

- With probing, it appears that most do not believe that an area with little population or reputation for modern or high-tech industry could be economically vibrant or able to provide a generally high socio-economic status for a majority of its residents.
- A few in Boston have the impression that a substantial portion of the population rely on public assistance.

While many expect a rural area to offer blue-collar, lower-income jobs, some in Baltimore and Minneapolis have the impression that much of Maine has the potential to be relatively affluent, and expect that it is supported by 'old money.'

- Those who hold this view describe an image of the state in which seaside mansions and cottages are plentiful, and where generations of the wealthy from the Northeast's population centers have come to summer. Many of these are familiar with the Bush compound in Kennebunkport, or inaccurately assume that the Kennedy compound (located in Hyannis Port, Massachusetts) is located in the state.

"Old money. I think of Maine as having money."

Employer, Minneapolis

Maine is Not Generally Known for Having Large Companies.

While many assume that logging, commercial fishing, and tourism are important industries in the state, few are able to name any other industries or large businesses associated with Maine.

- L.L.Bean is the only company accurately associated with the state, and that is mentioned by just a few outside of Boston.
- Several respondents in Minneapolis and Baltimore also guess, incorrectly, that companies like Red Lobster (of Orlando, Florida) or Gorton's (of Gloucester, Massachusetts) are located in the state.
- In the Boston groups, water bottled by Poland Spring was provided to respondents, and while none proactively volunteer associating that company with Maine, after seeing the name on the bottle, most recognized that the brand is based in the state.

"There's no big companies that would be a draw, like Under Armour is for Baltimore. It's just not even on the radar."

Consumer, Baltimore

"It's just lumber, lobster, and tourism."

Employer, Boston

Notably, a few in each market say they can picture Maine as a state that could have the potential to host a high-tech hub where independent people in information technology fields are able to operate, whether for local companies or remotely for companies not headquartered in Maine.

"There is a small technology sector in Portland."

Consumer, Boston

"There are parts of the country like Portland (Oregon), or the mountains of Virginia, where you have a school like Virginia Tech, where people go to the school, they fall in love with the area, and they can do their high-tech job from the cloud. They love the fact that they can go out on their kayak after work. So maybe there is a small pocket of Silicon Valley there."

Employer, Baltimore

Maine Is Often Believed to Be Less Technologically-Advanced Than Other States.

The previously-described view of Maine as a potential high-technology hub is the exception, however. Participants who have more familiarity with the field caution that a location like Maine would *not* be appealing to programmers and IT professionals, due to perceptions of the slower pace of life in Maine; its older, less diverse demographics; the attractiveness of other locations better known for their information technology industries; and its cold weather, which may not appeal to foreign-born programmers.

"Most software teams work together in scrums, which are competitive. They're not just working in silos alone."
Employer, Boston

This suggests that Maine may struggle to attract those in the information technology fields even under the best of circumstances.

A perception that internet usage is less common in Maine suggests that owners of businesses that interact with their clients directly through the world wide web may doubt their ability to reach the lifeblood of their professional service business.

Furthermore, while most assume that technology infrastructure would be adequate in Maine, some doubt this would be the case in any rural area, pointing to a perception that rural states are not good candidates for widespread high-speed internet coverage. They would expect that the (older, potentially less-educated) populace in Maine and other rural states would be less apt to use it.

"I think most people here have access to technology and take that for granted. We have Wi-Fi set up everywhere, and it's easy to communicate. It's not like that everywhere. I've switched to a cloud-based computing system, and if lived in some rural area, I probably wouldn't be able to do that. The technology is there, but the people might not use it as much as people here. That's my experience."

Employer, Baltimore

"I don't feel there is computer-based technology there for some reason."

Employer, Baltimore

There Is Little Consensus About the State's Overall Economic Health.

When asked about the performance of the state's economy broadly, few have any firm expectations or knowledge, and therefore draw conclusions based on their perceptions that Maine is sparsely populated and rural.

Still, a few interpret a lack of news coverage of the state's economy to be a sign that it is at least performing on par with most others.

"The economy, I guess, would be fine, because I don't hear much in the news about it."

Employer, Baltimore

"The economies in the North and East – my impression is that they are strong, and I would group [Maine] with them."

Employer, Minneapolis

Or, when they consider how a seasonal, tourism-focused economy might perform, some assume the economy represents a mix of performance, thriving or declining seasonally.

"If you're in tourism or a seasonal business, it's 6 months of craziness, and then you get a 6 month vacation."

Employer, Boston

Even in nearby Boston, there are varying perceptions of the state's economy, with some believing it is strong, and others believing it is 'flat' or 'depressed.'

Few Expect a Wealth of Jobs To Be Available in Maine.

Overall, few picture Maine as a state that has plentiful jobs or where workers are able to take their jobs for granted.

Very few recent Maine movers say they moved to attend college in Maine or due to a job transfer. Several were able to move to Maine, however, and continue to work remotely for employers as far away as California.

- They, too, echo the notion that Maine does not have plentiful jobs or a variety of thriving industries outside of restaurants and hospitality.

"I don't think I was expecting how seasonal job opportunities are. I had a really hard time finding a job even at Trader Joe's. That's something I've heard about a lot – the seasonality of jobs and opportunities."

Recent Mover, Portland

"Lack of opportunity is something that people had said for me [to expect when I moved to Maine]. I'm a teacher so it's not an issue for me. But I've had people who are from Maine who work in different industries find work where they're struggling to have a career long-term. So I knew that going in."

Recent Mover, Portland

The image of Maine as a place where jobs are not altogether plentiful contributes to an image of loyal, hard-working employees in the state.

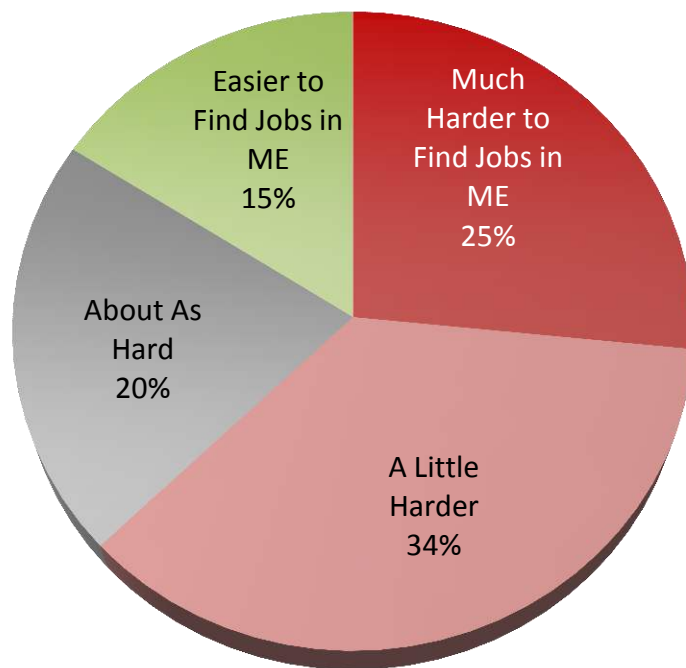
"If it's a loyal culture, I like that. Even if it's tough to find an employee."

Employer, Minneapolis

Many Current Residents Also Believe That Finding a Job in Maine is Difficult.

Mainers as a whole would appear to agree with the perception that the state may not have an abundance of jobs. In a recent quantitative survey of residents of Maine, six out of ten believe it is harder to find a job in Maine than in other parts of the Northeast (59%) – with many of Mainers feeling it is *much* harder (25%).

Relative Difficulty of Finding a Job in Maine*



* Results drawn from the *Critical Insights on Maine* survey of 631 residents of Maine in the Spring of 2017.

"Based on anything you may have heard or believe, how hard do you think it is to find a job in Maine compared to other states in the northeast?"

Detailed Findings

CONSIDERATIONS IN RELOCATING TO MAINE

LIFESTYLE ISSUES

Many Crave an Improved Quality of Life.

When describing their ideal place to live, work, and run a business, one of the most common qualities consumers and business owners say they would like is an improved quality of life. Though not always well-defined, quality of life encompasses a number of aspects of a physical and psychological living situation that are relatively consistent across markets.

Quality of Life

As shown on the following pages, quality of life encompasses many things, most notably:

- A low cost of living;
- A more equal balance between work and life outside of work;
- Access to nature – especially proximity to the ocean;
- Stronger relationships with others;
- A more trusting lifestyle, marked by low crime and an environment where residents do not worry about their family's safety;
- Less traffic and shorter commutes;
- Good schools (primary grades through college);
- Access to quality healthcare;
- Convenient access to other cities, states, and countries;
- Climate; and
- Arts & Culture.

“‘The way life used to be.’ That would be appealing on some level. Go back to when the world wasn’t so muddy. You can have kids outside and not feel unsafe, like here. People are polite and everything is not rushed. It’s like a step back in time. And it’s refreshing.”

Consumer, Boston

Many Feel Pressure From a High Cost of Living.

A Lower Cost of Living

Many residents of the large suburban areas included in this research attribute a number of issues they face to a high cost of living. Primarily this includes housing costs, though they do mention other high expenses as well. For business owners, the high costs also impact staff, facility, and supply expenses.

- Several mention a strong desire to ‘get more bang for your buck’ as a reason for coming to Maine or for being willing to consider relocating to the state.

“You can compare Maine to where they're living. If I can get everything I have here in Boston for less money, you’ve got my attention.”
Consumer, Boston

“There has to be a quality of life. If you're moving a company, you have employees to think of and their families... That and real estate costs and taxes.”
Minnesota Employer

“I got a house for \$100,000 less than I would have in Boston.”
Recent Mover, Bangor

“People in my age range – 24, 25, 26 – a lot of us are stuck back home with our parents. If you're lucky, you get a job at McDonald's, scraping by to pay your insurance. All my friends who left Connecticut are doing well up here.”
Recent Mover, Portland

“Some of the areas are – wow – [you’re surprised by] how expensive it is. Housing, plus taxes, plus standard bills. It just [adds] up so fast.”
Consumer, Baltimore

“I was pregnant and I needed more space than I had in Boston.”
Recent Mover, Portland

Nearly all of those who recently moved to Maine mention some aspect of quality of life as a key reason why they considered the state and eventually chose it over others.

Employers and Consumers Alike Want a Better Work/Life Balance.

A Better Work/Life Balance

Most consumers and business owners would like a more equal balance between their work responsibilities and their interests and obligations outside of work. At a deep level, they want the chance to unwind and reduce stress through a 'simpler,' 'slower' lifestyle that is not as stressful or physically and emotionally taxing.

- Employers in particular cite the stress of managing and running a business as a burden that can take a toll on them. Several do not picture changing their desire to work, but feel that they could actually be more successful, relatively speaking, if they took their work ethic somewhere with a slower pace of life – but were able to slow down just enough to be more comfortable.

"It's having a place that's not constant pressure [and that provides] a separation between my life and work. I never got that...in Boston. I can appreciate the city, but I also want to get away from that at the end of the day." Consumer, Boston

"I like it up here. The simplicity of it. There's no busy-ness. It feels like you're not in the world – you're on the outside looking in. My friends in Iowa are like 'Why did you move there, there's nothing up there.' Yeah – but that's the good thing about it."

Recent Mover, Bangor

"A slow pace of life is a benefit – to reduce our blood pressure and stress level."

Employer, Baltimore

"Moving to Portland...You may be one of the quicker guys who can get more stuff done and be more successful. You can slow down 5% and still be faster than the other guys."

Consumer, Boston

One critical aspect of an improved work/life balance – and quality of life generally – is less traffic and a shorter commute.

"My commute is sometimes two hours. That's one reason I would look – not having to do that." Consumer, Boston

"If I had a choice I would move from the area. Traffic is the worst. I spend two hours out of my day in traffic. I'm sitting there for an hour getting to work. I'm sitting in traffic getting home from work."

Consumer, Baltimore

Maine's Environment – Especially the Ocean – Would Be a Strong Draw.

Proximity to Nature

For many, access to nature and the ability to take part in outdoor recreation activities are important. Several in each market – including Minneapolis – volunteer that they would, ideally, live close to a body of water.

- For residents of Baltimore and Boston, the ocean is a relatively short drive away, and provides recreation opportunities and a welcome escape from urban or suburban living. For residents of Minneapolis, this desire to be near water has created a 'cabin culture' in which many residents in the southern, more urban, part of the state go to the rural, northern part of the state to relax and unwind.

"My major draws are the things that endear me to here – the forest and lakes. You can fish and hunt, but then you get that added bonus of having that ocean. That coastal area. Being able to get to a lot of fun places around there." Consumer, Minneapolis

Many recent movers to Maine claim that the natural environment had a key role in attracting them to the state. For these new residents, as with those in other markets, the ocean in particular has a powerful physical and psychological allure that sets Maine apart from other states.

- The desire to be near water goes deeper than the outdoor recreation activities it provides, however. Beyond that recreation aspect, most point to a psychological benefit to being near the water. They often have difficulty describing that benefit, but they say that water – and, again, the ocean in particular – 'calms,' 'centers,' 'balances,' or 'refreshes' them in a way that other environments cannot.

"Close to nature. I want to be able to go kayaking when I want to. Especially close to water. I couldn't live in a land-locked state because water is grounding for me." Consumer, Boston

"For me it's the beaches. [They] let me relax and decompress." Consumer, Boston

"There has to be a beach – has to be water." Employer, Baltimore

"There's something about that water. It's very calming. The scenery in Maine is surreal." Recent Mover, Portland

Lower Crime Is Also Very Attractive to Residents of These Large Suburban Markets.

Less Crime

Many also cite a strong desire to attain a more trusting lifestyle, marked by an environment with low crime where they do not worry about their family's safety. This is mentioned frequently by recent movers as a benefit to their relocation.

"As I get older, I just want peace and quiet. I want to be safe. I just want to be in a place where it's safe for my wife and me to raise our girls."

Consumer, Boston

"I think I'd be drawn by a better lifestyle. A...lifestyle with low crime. I'm still looking for that small-town feel."

Employer, Baltimore

"Safe. You don't hear too many bad things going on up here. Since I've moved up here, I've heard more about Connecticut and Massachusetts with all the shootings and drug overdoses. I don't feel like I have to worry or look over my back."

Recent Mover, Portland

"Up here you can actually breathe. You're not looking over your shoulder."

Recent Mover, Bangor

"People would not be as suspect – always wondering, 'what do you want from me?'"

Consumer, Boston

"I knew we needed to get out of Iowa because the city we were in was getting overrun by gangs from Chicago. So we wanted a place where our son could grow up and not have to worry about him or the safety of anyone in our family. There's no murders on the TV everyday. No gang activity. Nothing like that."

Recent Mover, Bangor

Many Would Like Improved Relationships – With Family and Diverse Neighbors.

Improved Personal Relationships

Whether verbalized or implied, one key aspect of quality of life for many is the chance to have more and stronger relationships with others – in their families and communities. Many recent movers say this was a goal of moving to the state – one that living in Maine has indeed provided.

“People seemed a lot more friendly up here. They felt more family-oriented so I felt like I could make my relationships better.”

Recent Mover, Bangor

“It feels like people take the time to get to know and engage with one another here.”

Recent Mover, Portland

“As I was getting older and in a stable relationship, it became clear that being in the city it would make it hard to support a family. Maine had those components that made it appealing to raise a family.”

Recent Mover, Portland

A related aspect of a quality of life for some would include ‘nice’ and welcoming people who are open-minded and accepting of people of various countries, ethnicities, religions, and ways of life. Many fear that Maine – or any rural environment – would not offer that desired cultural diversity.

- Several residents of Minneapolis mention a term in wide usage across the region – “Minnesota-Nice,” which describes the mindset they are looking for: a community spirit in which neighbors help neighbors and welcome people of all walks of life.

“The niceness of people here and the friendliness of people here has been really, really helpful. It’s just people being nice and it allows me to flourish and be successful.”

Employer, Minneapolis

“I see Maine as limited – a lot of things I’m used to having in bigger cities, are just not there. [As a black woman,] it’s very white-washed for me.”

Employer, Minneapolis

“For me, there are a lot of rural parts of the country that are not as diverse or open-minded. That might not be true, but I need people to be more open-minded, so I wouldn’t live in a rural area.”

Consumer, Boston

“My family literally said, ‘Are there black people up there?’”

Recent Mover, Portland

Quality of Schools Is Also a Factor in Quality of Life.

Quality Schools

Having access to high-quality schools – both public and private, representing all grades and levels – is an important quality of life consideration for many consumers and employers across all markets included in this research.

While those who have children are, predictably, keenly focused on the schools where they live, even many without children believe that the impact of schools extends to communities and households without children. Few know anything about the school systems in Maine.

“We do have a relatively large, well-educated workforce. It starts in the public school system. We have a better public education system here than in other parts of the nation.”

Employer, Minneapolis

“If the schools are bad I wouldn’t go there. It says something about the community you live in, and what you value. You need [good] schools.”

Consumer, Boston

Many consumers and employers have the perception that the university system in Maine is not as strong as in the areas they live in. This further reinforces their image of a state with few young people and a population that is potentially less educated than more urban markets.

“Maybe they should let us know how the schools are? Around here you see the quality of the schools advertised.”

Employer, Boston

“I don’t think there are a lot of universities. You think of Boston, or New York, or DC. People get jobs there and they stay there. That’s not the impression I have of Maine. Because you don’t have those types of universities, you don’t have that young population.”

Employer, Baltimore

Quality Healthcare Has More Than Physical Benefits.

Quality Healthcare

Several also suggest that a quality healthcare system is important to them, whether to treat health conditions they have now, conditions a family member has, or over a general concern about potential future health problems.

- Subjectively, in addition to the tangible benefits, a thriving healthcare system appears to convey a sense of sophistication to an area, with some feeling both comfort and pride in knowing their area has a reputation for excellence in medicine.

“Access to healthcare – is it available? Is it affordable? Is it high-quality? If there is a major health issue, will someone there be able to handle it, or will you be shipped three hours away to a major hospital....I don’t consider that good access to healthcare.”

Employer, Minneapolis

“We have access to a lot of major hospitals. Johns Hopkins and Children’s – that’s one of the best. There are a lot of other facilities. We have easy access to them.”

Consumer, Baltimore

“The quality of life – healthcare is the best. You have Mass General and you don’t have that other places.”

Employer, Boston

Most, even in Boston, do not realize that Maine offers a strong and robust healthcare system, though some recent movers to Portland are quick to highlight the quality *local* hospitals as a benefit to living there.

“I knew I wanted to move to Portland, but the fact that Portland or Maine in general has this amazing access...just having hospitals. Access to all kinds of things, but having it be affordable.”

Recent Mover, Portland

“Healthcare is good in Portland, but not many other places. I’ve noticed at work that if people get really, really sick, they get shipped to Boston.”

Recent Mover, Portland

The Ability to Travel and Reach Other Cities, States, and Countries is Important for Some, and Would Make Relocating Easier.

Ease of Travel

Easy access to other areas is a key part of the quality of life many consumers and employers are looking for. This includes both geographic proximity and access to large airports with frequent flights to different parts of the country and the world.

- In its favor, many, but not all, in Minneapolis and Baltimore recognize that Maine is functionally close to Boston, New York City, and parts of Canada, and assume it would be relatively easy to access other, more distant cities, like Washington, DC from the state.
- At the same time, many would be concerned about the availability of an airport that would service these and more-distant locales from Maine.

"We're used to a fairly good sized city. If you're in Maine, the closest largest city, I would guess, is Boston. And that's probably several hundred miles away. For a lot of people, that might be a deal breaker."

Employer, Minneapolis

"It's on the coast and you can reach New York and you can reach Connecticut and you can reach Albany. You're close enough."

Employer, Minneapolis

- While many say they want this access in order to satisfy their personal wanderlust, others suggest that it addresses one of the most common concerns to relocating anywhere – being close to family members. Having easy access to transportation centers is particularly comforting to people who would need to travel to see loved ones if they moved.

Many Would Like Maine's Seasonal Variation, Some Would Not.

Climate

Another common component to quality of life is a climate that provides four seasons.

While many Minnesotans comment negatively about the winter weather there, they acknowledge that the season can be managed and that it can provide some benefits and enjoyment through outdoor recreation and the change of scenery.

This sentiment is not universal, however, as many volunteer a desire for a more temperate and balanced climate like that of the Southern and Western United States.

"There's something about New England – the four seasons, the ocean next to you, the snowfall." Recent Mover, Portland

"Four seasons. You have your spring, which is obviously glorious. It's nice in the spring you're just coming alive. People are coming out of their houses – their hiding places – after winter. Then in the summer people meet at the pool. [There are] a lot of kids' sports. And then in fall, there's plenty of roads to drive down the river and see the beautiful colors, which you don't get in a lot of places."

Consumer, Minneapolis

"January is our coldest month, and February and March, you just have to struggle through." Consumer, Minneapolis

"We made a conscious decision to move, live, and raise our daughter here because of the four seasons. As much as we get frustrated with winter weather especially, it was the variety of seasons [that drew us]. It was having her have the ability to be exposed to that, as we were. We had opportunities to go to California or other areas that we had more comfortable weather, but we wanted her exposed to that."

Employer, Minneapolis

"I want 85 degrees and sunny, 365 days a year."

Consumer, Baltimore

Portland's Entertainment Venues Would Be Very Attractive To Potential New Residents – If They Were Better Known.

Arts & Culture

For many consumers younger than 40, a thriving nightlife and social scene would be an important consideration in any place where they would move or start a business.

- They want access to a variety of restaurants along with trending arts and cultural performances.

"The young, hip, social places are where we're likely to go."

Employer, Minneapolis

"What comes to my mind is small town, Andy Griffith, type of stuff. No big cities. Main street. Little grocery stores, probably run by a family. It's not cosmopolitan. It's not a metropolis. When I was younger, that would have been bad. Now, it sounds wonderful."

Consumer, Minneapolis

While recent movers to Maine believe Portland offers an abundance of these social venues, awareness of Maine generally is so low that few outside of Boston know anything about Portland or what it offers.

"They don't have a big metro area like we do."

Employer, Minneapolis

- Those who have been to Maine previously, however, are also highly likely to cite Portland as a desirable place to live because of the urban amenities it offers.

"Portland is beautiful. It's a walking and driving city."

Employer, Baltimore

"We moved here from San Francisco. And we finally settled on Portland. It was the town that drew us – the big-city amenities and the affordability of a small town was the big thing. Others in my family have moved here now."

Recent Mover, Portland

"Walking around downtown is enough of the things that I would have missed from New York. I needed that element of excitement."

Recent Mover, Portland

"I went to Portland, Maine a couple weeks ago. It was awesome. It was like downtown Boston."

Consumer, Boston

Civic Pride – In Maine and Elsewhere – Comes From Many Sources.

Civic Pride

Several also value, directly or indirectly, a sense of civic pride that arises from the amenities, unique qualities, or industries in an area. In addition to providing jobs to these communities, corporate and civic institutions provide a sense of vibrancy, social desirability, and contribute to other initiatives like arenas, parks, and artistic venues.

- In Minneapolis, Target and BestBuy are frequently noted for their community impact; Baltimore residents point to Under Armour and Southwest Airlines; Bostonians highlight the biomedical research facilities and the university system as particular points of pride.
- Some mention pride in other unique attractions in their areas, such as Baltimore's crabs and the NFL Ravens.

"Even In the twin cities we have a lot of Fortune 500 companies like US Bank, Medtronic, 3M, and Target. We're sort of a medium sized city, but we have an awful lot of large corporations, which boosts wages." Employer, Minneapolis

"Another thing that's really great is the sports teams. You have the Orioles, the Ravens. So you have a lot of die-hard, passionate fans who can come together. When the ravens won the Super Bowl, it was a very exciting time." Consumer, Baltimore

"It's that pride aspect. I would like to move some place where's there a pride. You can enjoy [the fact that] this is a cool thing about where I live." Consumer, Baltimore

Those who live in Maine, especially the Portland area, also point to a number of positive qualities to living in the state – many of which generate civic pride by being unique to Maine.

Portland residents are highly focused on the positive aspects of living in or around the city specifically, most often citing the food, arts, breweries, museums, and Portland Sea Dogs as venues that help them feel socially engaged.

Several residents of Bangor volunteer the City Forest in particular as an attractive local amenity that blends city life and nature.

Detailed Findings

CONSIDERATIONS IN RELOCATING TO MAINE

BUSINESS/WORKFORCE ISSUES

Dedicated Workers Are Generally in Short Supply and High Demand.

Workforce

For business owners in particular, a strong workforce would be a key aspect of an ideal place to run their business. Across a wide variety of industries, these employers clarify that by ‘strong’ they mean not only the *size* of the workforce that is available to them, but – more importantly, it appears – the *quality* of the workers they are able to hire.

Employers in all markets included in this research volunteer a struggle in recruiting and retaining employees who take pride in their work, are reliable, and are able to tune out the distractions provided by smart phones.

- A strong work ethic is one of the most important qualities employers look for, and one that, according to many, is lacking in the workers they find in their areas.
- Customer service skills and the simple ability to interact with people and meet their needs are also critical for many employers, but are also thought to be missing in most workers available to business owners in each market.

“The work ethic is not what it used to be.”

Employer, Baltimore

“One of the issues I have is that ‘You have to put your cell phone down, please.’ That’s an issue – the constant addiction to their phone.”

Employer, Baltimore

“I find that young people don’t understand customer service. Sometimes it floors me.”

Employer, Minneapolis

“I find one good employee every five years. I have to do the work myself.”

Employer, Baltimore

“I need reliable workers who are willing to learn.”

Employer, Baltimore

“Finding and keeping people is a huge issue. I think it coincides with the work ethic. You go through the whole hiring process, and they don’t show up the first day.”

Employer, Minneapolis

Education and Specific Job Skills Are Often Less of a Priority Than Work Ethic.

Predictably, education and skills are also important qualities in a workforce available in an area.

- Some business owners included in these discussions do not typically need workers with advanced academic credentials or degrees, and others are confident they can teach the skills or provide the job-specific knowledge their workers need. So while some say schooling is *less* important than the work ethic and other ‘soft’ skills, it is still important to many, if for no other reason than it draws white-collar businesses to the area. Still, some do express frustration at the lack of knowledge their workers may have.

“The highly-educated people attract the businesses here.”

Employer, Boston

“I’ve interviewed college graduates who can’t calculate 10% of something.”

Employer, Minneapolis

The frustration with the lack of work ethic or, for a few, educational attainment, is a key reason why the *size* of the workforce is so important to these employers. They feel they need a large pool to choose from in order to increase their chances of finding a person with the right ‘soft’ skills.

“I would rather have someone who has a good work ethic and values who I can train. We invest a lot of time in doing that. You can teach the tasks, but not the attitude. You have to kiss a lot of frogs before you get your prince.”

Employer, Minneapolis

Compounding their frustration, a few complain that workers in these suburban or urban areas, due at least in part to a high cost of living, expect a high wage in order to justify their work. Many believe the expected salary is *not* justified by the quality of work, amount of work, or services provided to customers or the employer.

“What I’m seeing is that people are really not that skilled, but they’re very demanding. You pay them well – especially Millennials. I’ve noticed that very dramatically in the last 8 years.”

Employer, Minneapolis

Maine is perceived to offer – or have the potential to offer – high-quality, diligent, loyal, and honest employees, though most employers are concerned about the shortage they would face in the number of available workers in the state.

Employers Would Be Particularly Concerned About Relocating to A State With a Small Population.

Overall, the most common and impactful business-related concerns about moving to Maine are related to the state's small population.

- For business owners, having a critical mass of potential customers is a crucial quality of any area in which they would run a business. Regardless of their industry, many fear that, even in its most populated areas, Maine would not provide the volume of customers they need to be successful.
- On the more positive side, a few do believe that the lower cost of living would offset lower sales, and that Maine would provide other, less tangible benefits as well.

"There's nobody in Maine, [so] there's no money in Maine. It's beautiful and you can vacation there, but to convince any type of business to come to Maine – you [have to show they] can make money there. More people are living here. I'm thinking that way of Maine, New Hampshire and Vermont. Unless someone is going to convince me that I can make money, I'm not going to do it. My business wouldn't work when there's nobody there."

Employer, Boston

"I'm looking from my retail perspective. I think I'd only make money June to November."

Employer, Baltimore

"It seems like there's a very small population and you would have to have a specific brand of products, unless you were selling outside the state. But in Maine I think you'd have to have something that would have to be specific to Maine that the residents really need in order to make a profit."

Employer, Minneapolis

"The primary challenge would be employees...if [you needed] more than 100 employees I think you would struggle with hiring people."

Employer, Minneapolis

Consumers echo this concern about a small population if they were considering a move to Maine, but without a business to represent, their concerns focus on a potential lack of convenience and amenities that are typically available to residents of more populated areas.

"Population...[and] businesses, what kind of companies are in the area? What's the town or city known for? Do you have to go three towns over for the DMV? If the things I need are in proximity."

Consumer, Boston

Many Employers Would Also Have Concerns About Maintaining a Steady Flow of Supplies.

As mentioned previously, few are able to confidently name any companies or industries in Maine, so even if they could imagine a critical mass of customers for their business, few business owners could consider relocating or expanding to Maine without a more concrete understanding of what competition they would face and whether they would be able to maintain their supply chain.

"If I need supplies [now], I can go to Staples. No big deal. The post office is very close."

Employer, Boston

Several employers question whether specialty materials that their business needs would be available, and a few even wonder how easy it would be for them to procure typical office supplies.

Taxation Is a Key Concern for Business Owners.

Low Taxes

Taxes and other associated costs of doing business are an acute, top-of-mind concern for business owners. Any jurisdiction that provided lower tax burdens would be very appealing to most if not all employers. In addition to the financial impacts on their business, many business owners seem to feel a broader, more deeply-rooted frustration from these taxes, fees, and regulatory barriers.

- Most business owners – in all markets – lament high income taxes, real estate taxes, business registration fees, and the ‘hidden taxes’ of government bureaucracy, including permitting and inspection fees.
 - In addition to the direct financial impact these taxes have on businesses, the frequent delays and time spent navigating municipal regulations reportedly take a toll on many businesses.
 - Several business owners, in fact, claim that the state and local governments in their area are not only *not* business-friendly, but are in fact actively trying to stifle business growth.
 - Accordingly, business owners in each market are quick to name states that are known for being more tax-friendly, most often Florida, North Carolina, Delaware, Texas, and New Hampshire.

“The taxes are insane. A lot of people are moving to North Carolina, Delaware, and Florida. Taxes on small businesses are huge here. I feel like I’m the one keeping the economy going.”

Employer, Baltimore

“I’d go to Delaware, because of the taxes and you get a beach.”

Employer, Baltimore

“We pay a rainwater tax. They tax the rain!”

Employer, Baltimore

“I’d love to have less interference from the city in my business. There is a lot of times where as a small business I’ll have to pay a fixed fee for something, like \$250 to put up a sign, and that can be a lot when you’re first starting out.”

Employer, Minneapolis

“There’s a lot of that where the city is looking for revenue and they take it from people who are running businesses. I think that’s hard...I don’t think its done very well.”

Employer, Minneapolis

“If I were in control, to echo what other people said, I’d reduce regulation...And in addition to that, I’d lower taxes...It’s far too bureaucratic. It takes an awful lot of time and expense for everyone. The only one who wins is government.”

Employer, Minneapolis

Many Believe Maine May Offer a Favorable Tax and Regulatory Structure.

Although Maine is not listed among the less-taxed states, most seem willing and able to believe that the state could have a more favorable tax structure and business climate than where they are now (and than the state actually appears to have).

- They draw on the perception that Maine has a pervasive spirit of independence, in which the government would be 'hands-off' in its business regulation, and where there is less need for a burdensome tax structure due to the lack of urban amenities and infrastructure maintenance.

"I feel like it's the kind of place where if you went there and bought a piece of land, and build a castle, they would be like, 'Do what you want, build your castle.' Here they would be like, 'Is it HOA? Does it approve?'" Consumer, Baltimore

"I would guess there's lower taxes [in Maine]. Coming from here, though, anyplace would have lower taxes!" Employer, Baltimore

- Its geographic proximity to New Hampshire, coupled with a generalized lack of distinction between Maine and other Northern New England states, also lends credence to the idea that Maine may have a more favorable tax structure and business environment than many other states.

Other costs of doing business in suburban or urban markets are also challenges for business owners, though these successful business owners have been able to handle those costs and do not feel they weigh on the success of their business like taxes and government fees.

- The costs that impact business owners the most include the cost of employees, the cost of leasing space, and even the cost of business vehicle insurance due to high crime.
- While these costs may be high, they are seen as unavoidable given the highly-populated regions they operate in.

While many would like lower costs of doing business, outside of government regulation and red tape, for the most part, employers accept these costs as a trade-off required as part of doing business in or near urban environments.

Taxes Are Less Important to Many Consumers, But Are Still a Factor.

And although many employers believe Maine in particular would have lower costs of doing business, the state would have to convince some that even with the lower costs of doing business, their companies could still be profitable.

"There's the tradeoff. If you want to have a business, you are going to live in a large town, and you will have large-town problems."
Employer, Baltimore

Although taxes are much less of a concern for many consumers than for business owners, some consumers do mention taxes as something they consider when deciding where to live. While few recent movers to Maine admit to researching the tax structure of the state before relocating, many lament the high tax burden they discovered when they moved.

"That's why I bought my house – property taxes and all taxes [were lower in my town]. It figures in to what your disposable income is."
Consumer, Boston

"Connecticut is slowly going to hell – it is so overtaxed on everything."
Recent Mover, Portland

"When compared to other states, Maine has an extraordinary tax burden; I think it has the third-highest tax rate. And it burdens the residents – not the millions of visitors. The burden is on the Maine people alone."
Recent Mover, Bangor

Likewise, a recent quantitative survey of Maine residents show that taxes are among the most pressing issues for those who currently live in Maine.

Issue	% Listing Issue as Most Important	% Concerned About In Next 6 Months
	Today	
Unemployment/Job Loss	16%	21%
Taxes	9%	20%
Healthcare/Health insurance	10%	17%
Economy (generally)	11%	11%

Based on interviews with Maine-based business owners and secondary data collected for this research, Maine's current tax structure may not provide the tax situation many employers are looking for.

* Results drawn from the *Critical Insights on Maine* survey of 631 residents of Maine in the Spring of 2017.

"In your opinion, what is the most important issue facing Maine today?"/"As you think about the next 6 months, what economic or financial situations concern you the MOST?"

Households Will Not Move to Maine Until they Secure a Job, but the Broader Job Market May Have Less Impact on Willingness to Move Than Might Be Expected.

Availability of Jobs

Finally, while some consumers would look specifically for the numbers and types of jobs generally available in an area before they considered moving there, many imply that once they had secured their own employment – even if their significant other did not have a job there – they would turn their attention to evaluating other aspects of this new market, without evaluating the overall employment environment.

- Indeed, almost all recent movers to Maine say they or someone in their household had accepted a job in the state prior to their move, and few imply that a lack of other jobs was a barrier in their decision to relocate. This is not universal, however, as several do say that they would at least consider the overall economic performance of an area before moving there.
- A few recent movers began the process of relocating to Maine when only one member of a couple was offered a job. The other member of the couple either delayed relocation or moved and sometimes waits months to find employment.

“Ultimately you need money. Before you take that step or start down that path you got to make sure you have a job there and that your job and your compensation will create a comfortable lifestyle in the place that you're living. So that ties into the cost of living. You have to do a financial analysis before you make the leap.”

Consumer, Minneapolis

“I just had a lot of faith that things would work out [in my move to Maine]. I had hope that my current situation in San Diego would get better.”

Recent Mover, Bangor

“That’s scary, if there’s just L.L.Bean – if there’s just one industry, that’s a scary thing. Like coal in a Pennsylvania town and the whole town shuts down because the mine shuts down. That does not make for growth. I see that in Maine. Because I don’t know of any opportunities, frankly.”

Consumer, Baltimore

“I wouldn’t want to move to [a place] that’s hitting the skids.”

Consumer, Baltimore

Almost all say they would not move out of their current area unless they had accepted a job and had done research to confirm that a new area offers the previously-mentioned qualities they look for in a place to live and work.

Summary

CONCLUSIONS AND IMPLICATIONS FOR FUTURE RESEARCH

Maine Can Overcome Many Barriers to Attracting Households and Businesses.

Maine has many qualities that consumers and business owners would look for if they were moving or planning to do business in another area.

- While some consumers and business owners say they will never relocate to a predominantly rural state (due to personal preference or business needs), many say they would welcome the change of pace, improved quality of life, and natural surroundings that such a state would provide.
- Maine is not alone in the workforce challenges it is experiencing. The concerns about its small workforce can be minimized by focusing on the quality of its workers – their loyalty, honesty, dedication, hardiness, and their solid work ethic.
- The biggest barrier to bringing households and businesses to Maine appears to be a general lack of knowledge about the state. Few outside Boston have a concrete idea of what life in Maine would be like or what it has to offer residents or businesses.
 - Most have a generally positive top-of-mind image of Maine and its people, and once they vocalize their impressions of the state and hear others' experiences and views, many say they are receptive to considering moving there.
 - If business owners and consumers can be convinced that there are enough people and adequate opportunities to support themselves or their businesses, the state will undoubtedly receive stronger consideration as a place to live and run a business. The quality of life it offers is enough to overcome many general financial concerns.
 - Still, consumers would not be able to move to the state without a job, accentuating the importance of Maine's current efforts to connect workers within and outside the state with employers.

Effective Messaging for Maine Would Focus on its Contrasts and Opportunities.

Specific messaging that could be evoked to increase interest in relocating to Maine should reflect:

- That Maine offers the “best of both worlds,” highlighting Portland’s truly urban atmosphere along with the state’s natural beauty, outdoor recreation, and proximity to the ocean;
- The truly exceptional quality of life it offers as a respite from so much of what ails modern cities (especially traffic, crime, and a high cost of living);
- The beauty and contrasts of the four seasons;
- The state’s modern and growing infrastructure and development in Portland and, especially, beyond;
- The proximity to Boston, and ease of reaching other population centers in the northeast and Mid-Atlantic region;
- The larger companies and industries that have been successful in Maine, with a particular focus on the quality of the workforce that would compensate for its small population; and
- How new residents and businesses have benefitted by moving to Maine.

The primary targets for this messaging should include the suburbs of large cities in the Northeast, Mid-Atlantic, and upper Midwest. Those who have the opportunity to work for their employers remotely may also be especially receptive to messages about moving to Maine.

Likewise, those who have been to Maine in the past are also strong candidates for relocation to the state. Though a small number in Minneapolis or Baltimore, and a much larger number in Boston, the large majority of visitors had very positive experiences in the state and, if permitted, would have been quite eager to describe their affection for it to other participants in the discussions.

- Those with experiences in Maine sometimes proactively mention the state as a place they would live if their life and business circumstances permitted.
- The large majority of recent movers to the state spent time in Maine prior to their move. Having first-hand knowledge of the state gave them the information they needed about what the state offered and what part of the state they wanted to relocate to.

Implications for Future Research

The final phase of this research will further examine and quantify the learnings from the first two phases through an online survey of 1,000 consumers who live in the Northeast, Mid-Atlantic, and Upper Midwest regions of the U.S.

This quantitative survey will focus on:

- Measuring knowledge and perceptions of Maine on a wide variety of attributes including, but not limited to, quality of life, environment, lifestyle, and economic opportunity;
- Profiling those who are willing to consider moving outside their current market in general, and those who would be willing to consider moving to Maine specifically;
- Identifying the most effective messaging for attracting people to Maine;
- Quantifying the extent to which consumers consider various qualities of a place to live when thinking about relocating, and gauging how well Maine is perceived to deliver those qualities;
- Identifying what information consumers need to know about a potential market they would move to, and where they would find that information; and
- Gauging the impact of specific barriers to moving to Maine, and how they can be overcome.