



Workforce and Business Attraction Research

*Phase III: Report of Findings From a Quantitative Survey of Potential
Movers to Maine*



November 15, 2017

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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 to the state. 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 or training for current residents to ensure they have the skills and knowledge necessary to support a wide range of industries in the future.

In order to achieve these goals, dpa was asked 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 it is like to live and run a business in the state;
- Identify the best prospects for relocation or business expansion to the state;
- 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 entailed three phases:

- Phase I: Exploratory Consulting (issue 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).

This report summarizes the results of Phase III of the research program, which consisted of an online survey with consumers. The information obtained from Phases I and II (the results of which are described in separate reports) informed the approach, questions, and analysis of this phase of the project.

A summary report of the implications and overall recommendations from the entire research program will be provided separately.

About This Report

The goal of the Phase III quantitative survey was to measure the importance and prevalence of the issues and views derived from the first two phases of the research.

In order to qualify for the Phase III survey, respondents were required to:

- Be between 18 and 55 years of age;
- Have a household income of at least \$50,000;
- Be employed full or part time;
- Be a college graduate;
- Be willing to consider moving to another state in the next five years; and
- Play a role in major household decisions.

Respondents were also required to live in the following states:

- New England: (n=300)
 - Connecticut, Massachusetts, New Hampshire, Rhode Island, and Vermont
- Mid-Atlantic: (n=300)
 - New Jersey, New York, and Pennsylvania
- East & West North Central: (n=200)
 - Illinois, Indiana, Michigan, Ohio, and Wisconsin, Minnesota, Iowa
- South Atlantic: (n=200)
 - Delaware, Maryland, Virginia, the District of Columbia, and West Virginia

Final data were weighted to ensure that the total results reflected the age, gender, and size of the general population in each of the regions above.

Key Findings

Three out of four residents of the Mid-Atlantic, South-Atlantic, Northeast, and North Central regions of the U.S. would be willing to consider relocating to another state in the near future.

- Few appear to have strong ties to where they live now, and many express a litany of frustrations with their current area of residence.
- Maine is one of the most common states these potential movers would consider moving to, and a majority believe Maine would offer at least most of what they would want in a place to live.
- The most common specific drivers for considering relocating to Maine are primarily associated with quality of life, where the state is broadly believed to be better than other areas.
 - The qualities that Maine can leverage to attract new households include a slower pace of life, being a good place to raise a family, low crime, less traffic, access to nature and water, and friendly people.
 - The state is also perceived by business owners to be on par with or better than other areas on a variety of attributes related to running a business. Fortunately, two key struggles for Maine – the size and age of its workforce – are among the least important qualities for employers. In particular, Maine is believed to have a favorable business climate with low taxes and regulation.
 - At the same time, Maine is perceived to fall short in employment, education, and cultural opportunities. The state's weather will also be a barrier for many.
- While half of potential movers say they have recently seen coverage of Maine in some form of major media, there is a distinct lack of knowledge of the state, though knowledge of Maine is in line with knowledge of other states in New England.
- Among five tested slogans that Maine has used to promote itself, "Worth a Visit, Worth a Lifetime" and "The Way Life Should Be" are the most popular and would be most effective in encouraging people to learn more about the state.

The potential market for new households and businesses for Maine is large, and the state is perceived to offer much to those who live and work there.

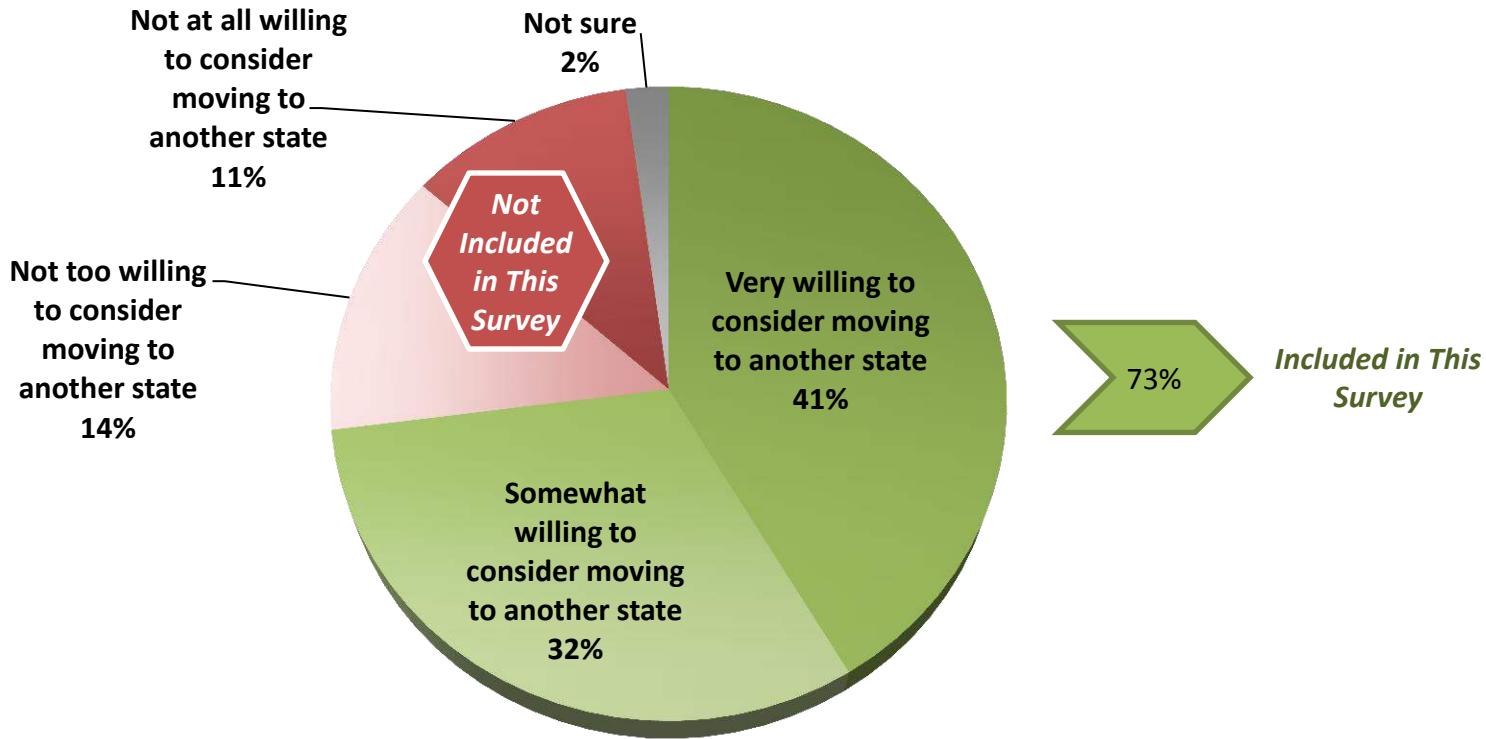
Detailed Findings

VIEWS TOWARD RELOCATING

Across the general population in the targeted regions, there is a broad willingness to consider relocating.

Three out of four, in fact, would be willing to consider moving to another state within five years, and many describe themselves as *very* willing to do so.

Willingness to Consider Moving to Another State



(n=2,611)

"Assuming you didn't need to worry about jobs and finances, how willing would you be to consider moving to another state in the next five years?"

Although many are long-term residents of their current area, few feel tied to where they live now.

In fact, two out of three say they dream of starting over somewhere new, and far fewer say they have not considered moving somewhere else.

Ties to Current Area

Years in Current Area	
<1	4%
1-5	25%
6-10	24%
11-19	14%
20+	32%

Almost half have lived in their current area for more than ten years.

Views Toward Relocating

(% 5-7 on 7-pt. scale)

I often daydream about starting all over in another area



I would be willing to live just about anywhere



I haven't considered moving anywhere else, so it would take me some time to get used to the idea of relocating



(n=1,003)

"To what extent would you agree or disagree with the following statements?"

"How long, in all, have you lived in the area you live in now?"

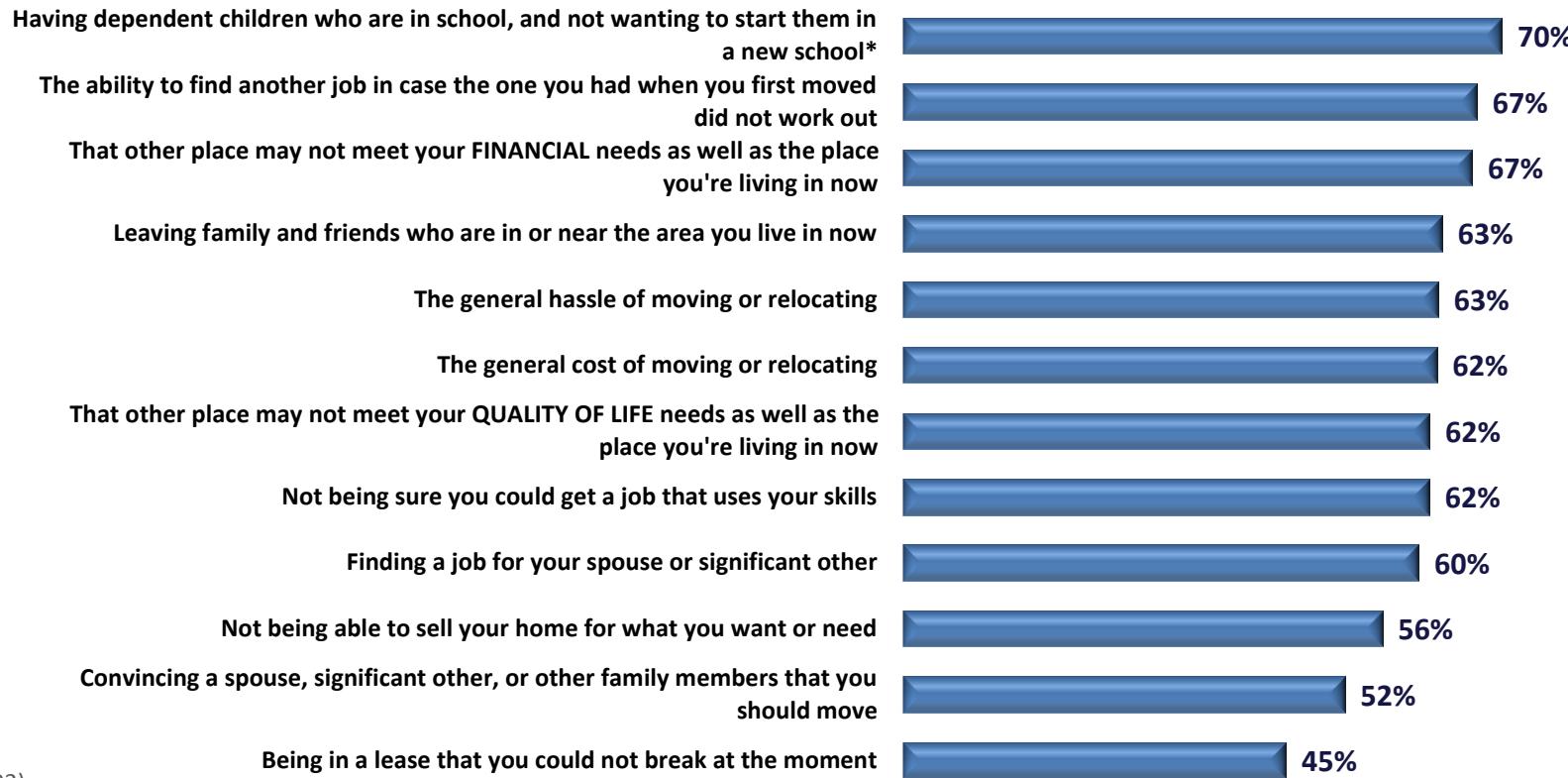
Scale: 1 ("Strongly disagree") to 7 ("Strongly agree")

Though many potential movers would have a variety of concerns about relocating, jobs and financial considerations are among the most commonly mentioned obstacles.

Barriers to Moving

Concerns About Relocating

(% 5-7 on a 7-pt. scale)



(n=1,003)

* (Among those with children in their household, n=565)

Many potential movers would also be concerned about their job prospects in a less populated area, and some would fear that they couldn't have the kind of life they wanted in another area.

Concerns About Leaving Current Area

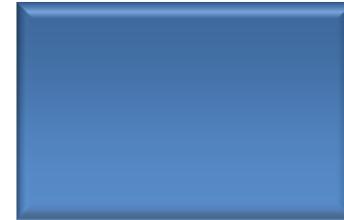
(% 5-7 on 7-pt. scale)

I would worry about my career options if I moved to a less urban/less populated environment



58%

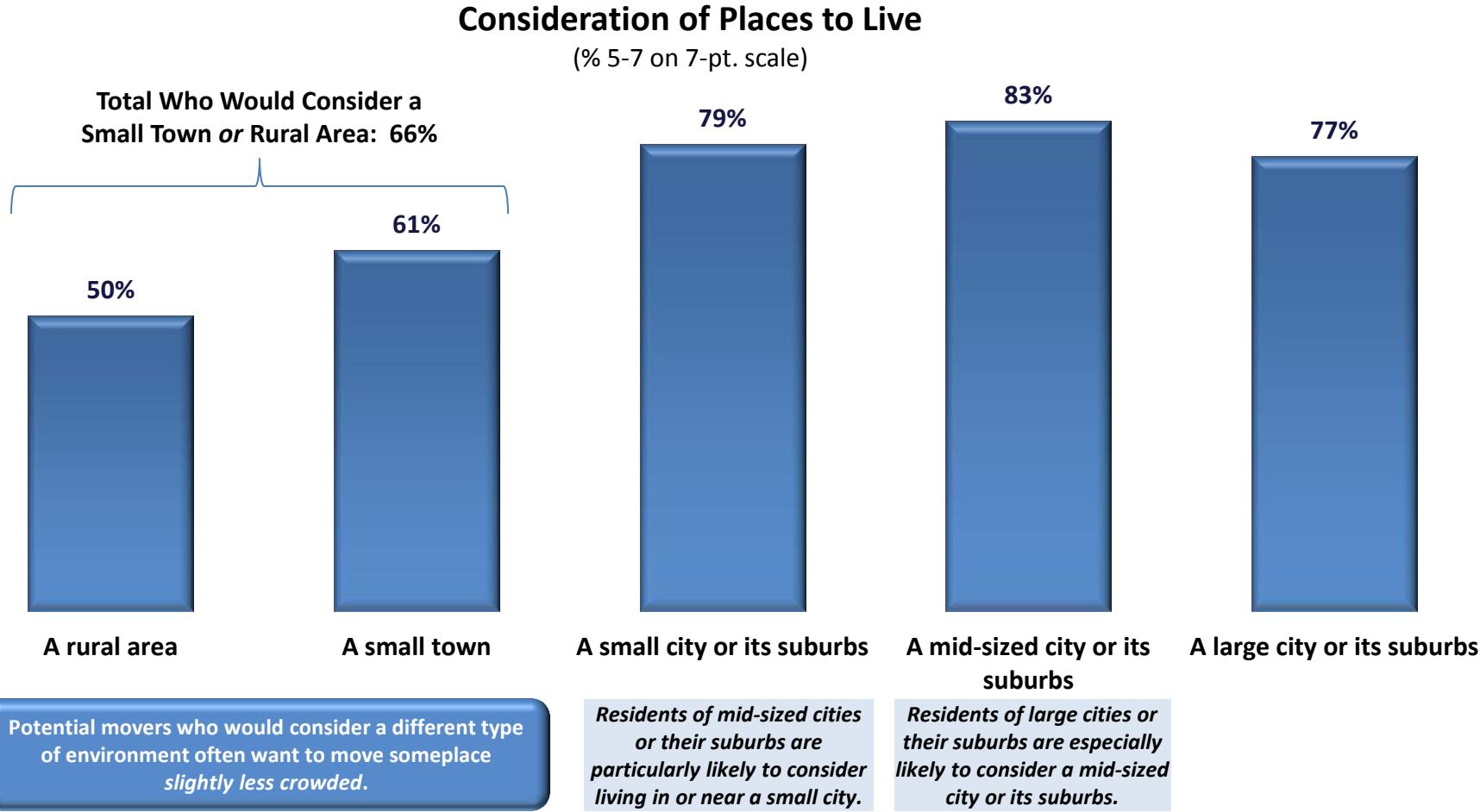
I don't think I could have the kind of life I would want in an area that wasn't like the area I'm living in now



39%

(n=1,003)

While two out of three potential movers would consider relocating to a small town or more rural area, more populated locations are notably more popular.



(n=1,003)

"Let's imagine for the moment that you were interested in relocating to another state in the next five years or so. If you were going to consider moving, to what extent would you consider relocating to...?"

12

Scale: 1 ("Definitely would not consider") to 7 ("Definitely would consider")

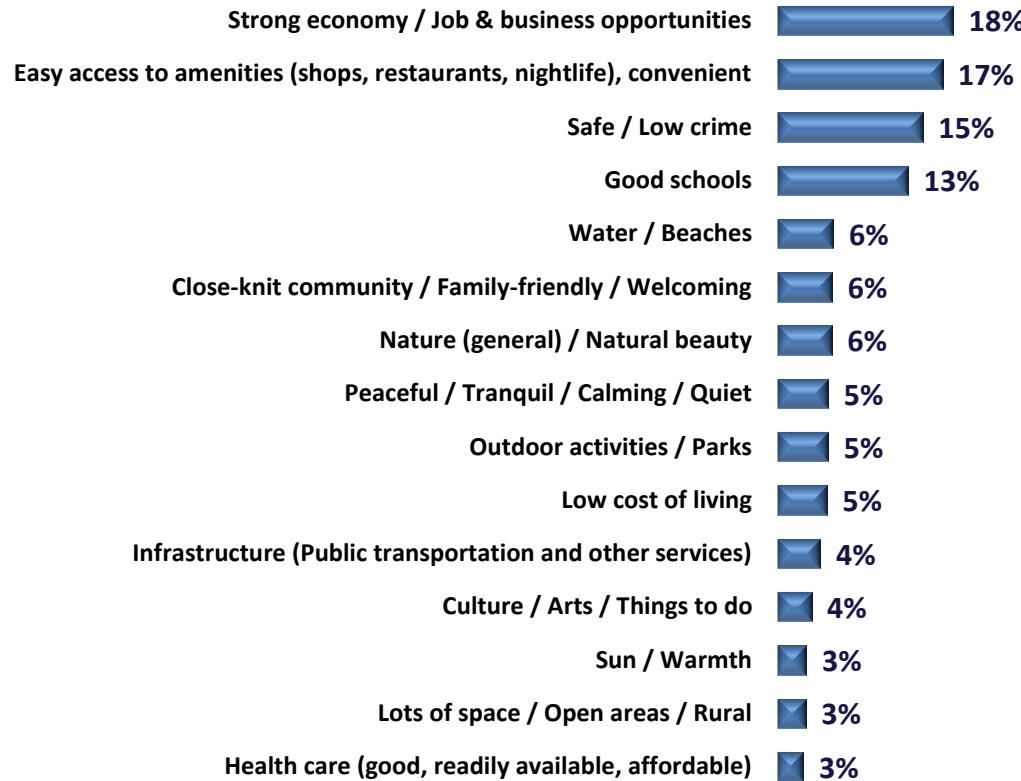
Detailed Findings

CHOOSING A PLACE TO LIVE

A strong economy, convenience, low crime, and good schools are, by far, the most common top-of-mind qualities potential movers would want in a place to live.

Top-of-mind Qualities

Top Qualities in a Place to Live



All of these qualities were also mentioned by participants in the focus groups (Phase II of this research) as qualities they would like in a place to live.

(n=1,003)

"How would you finish this sentence: Generally speaking, I would like to live in an area that provided ____."
Only characteristics volunteered by 3% of respondents or more are shown.

Importance of Attributes

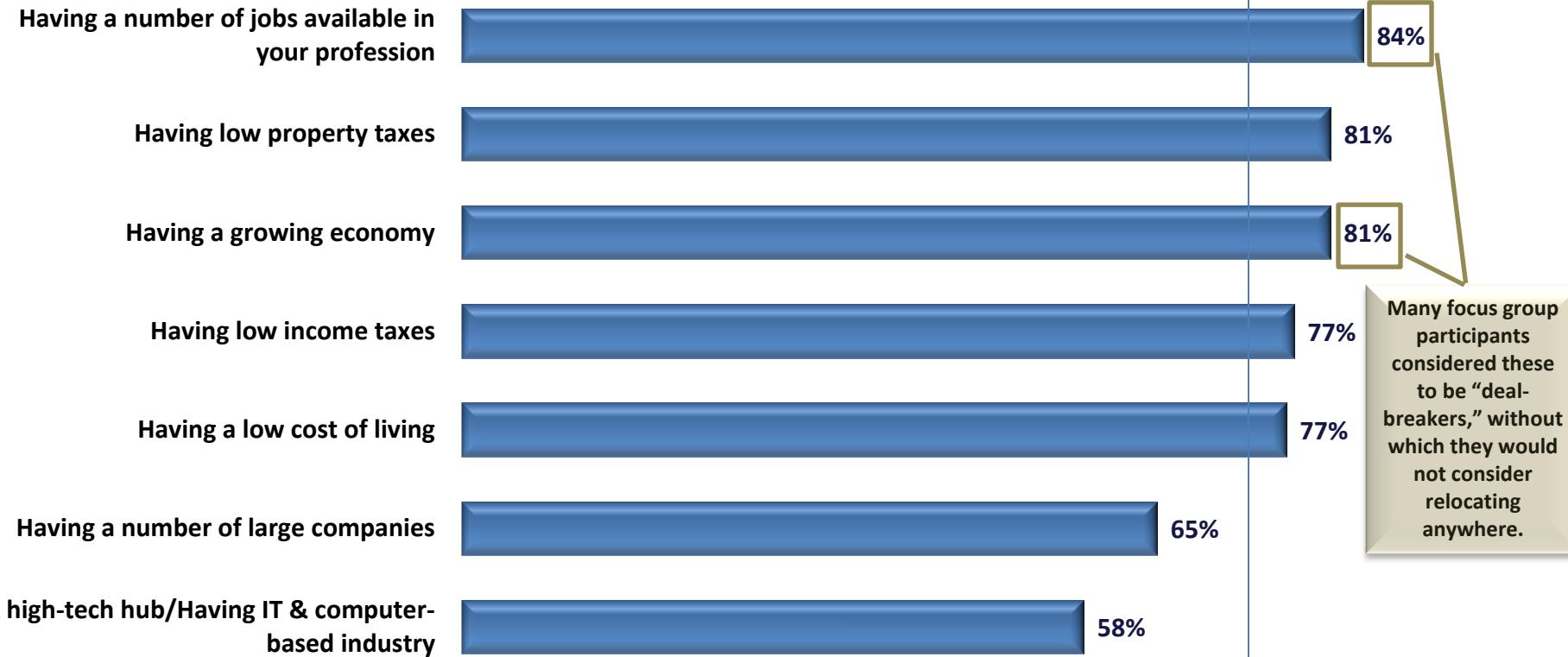
- As part of the survey, respondents were presented a list of 33 attributes they may consider when choosing a place to live. They were asked to rate the importance of each attribute if they were personally considering a new place to live and work.
 - Respondents were asked to use a scale of 1 (*Not At All Important*) to 7 (*Extremely Important*).
- Their views toward these attributes are shown on the following pages, summarized by the percentage who feel each quality is at least moderately important (a rating of 5, 6, or 7 on the seven-point scale).
 - Across all attributes, an average of 73% of respondents feel these items are at least moderately important (rating 5-7 on a seven-point scale). This average is shown for reference in the vertical blue bars on the following pages.
- The 33 attributes presented to respondents are shown on the following pages divided into four themes:
 - Economics and Finances;
 - Quality of Life;
 - Amenities; and
 - Access to nature.

Perhaps predictably, economic and financial factors loom large in a decision to move – most notably jobs, taxes, economic growth, and cost of living.

Economics and Finances

Importance of Qualities in Choosing a Place to Live

(% 5-7 on 7-pt. scale)



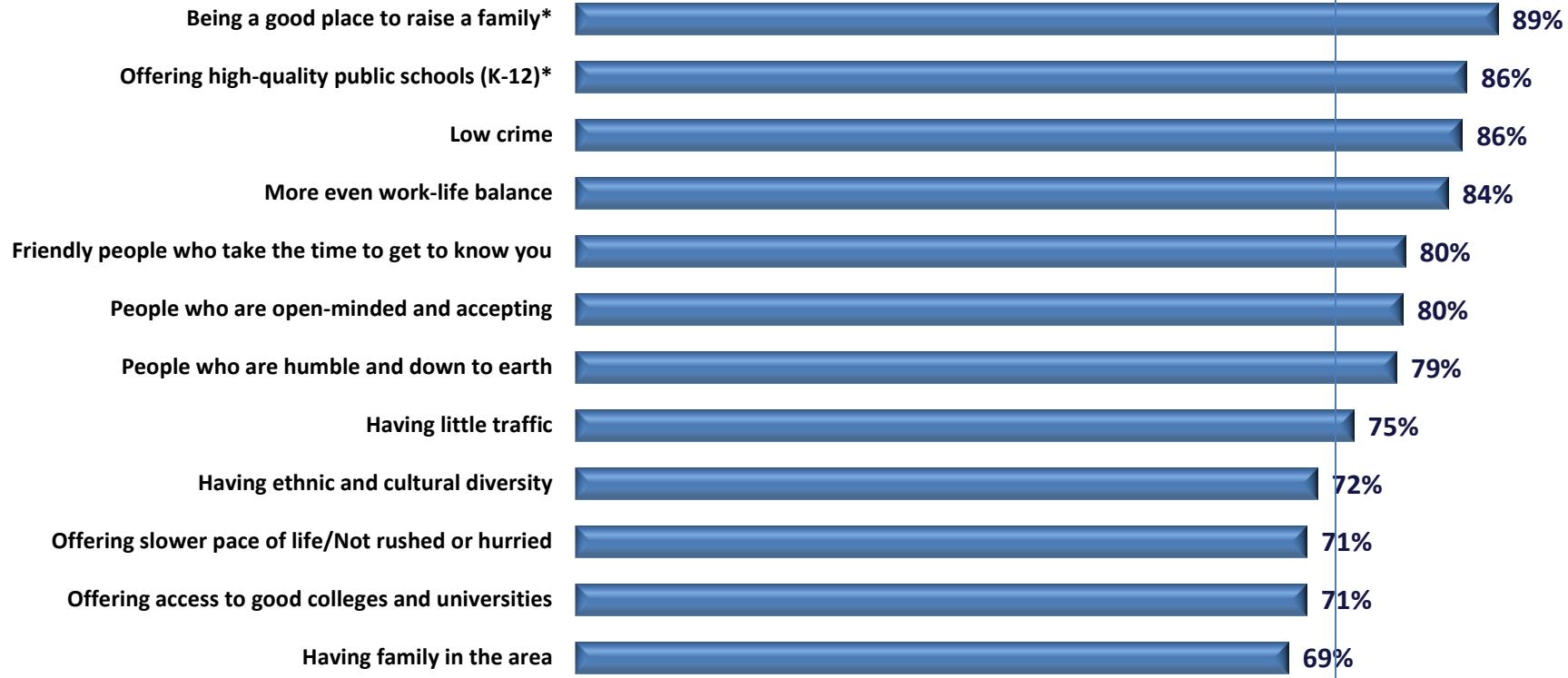
“People may consider many things when deciding where they will live. Please indicate how important each characteristic listed below would be to you, personally, if you were somehow in a position to choose a NEW place to live and work.”

Family-friendly amenities (such as good schools, low crime, and a favorable work-life balance) are key quality of life considerations for potential movers. Many would also consider characteristics of other residents in choosing a place to live.

Quality of Life

Importance of Qualities in Choosing a Place to Live

(% 5-7 on 7-pt. scale)



(n=1,003)

* (Among those with children in their household, n=565)

Average for all items: 73%

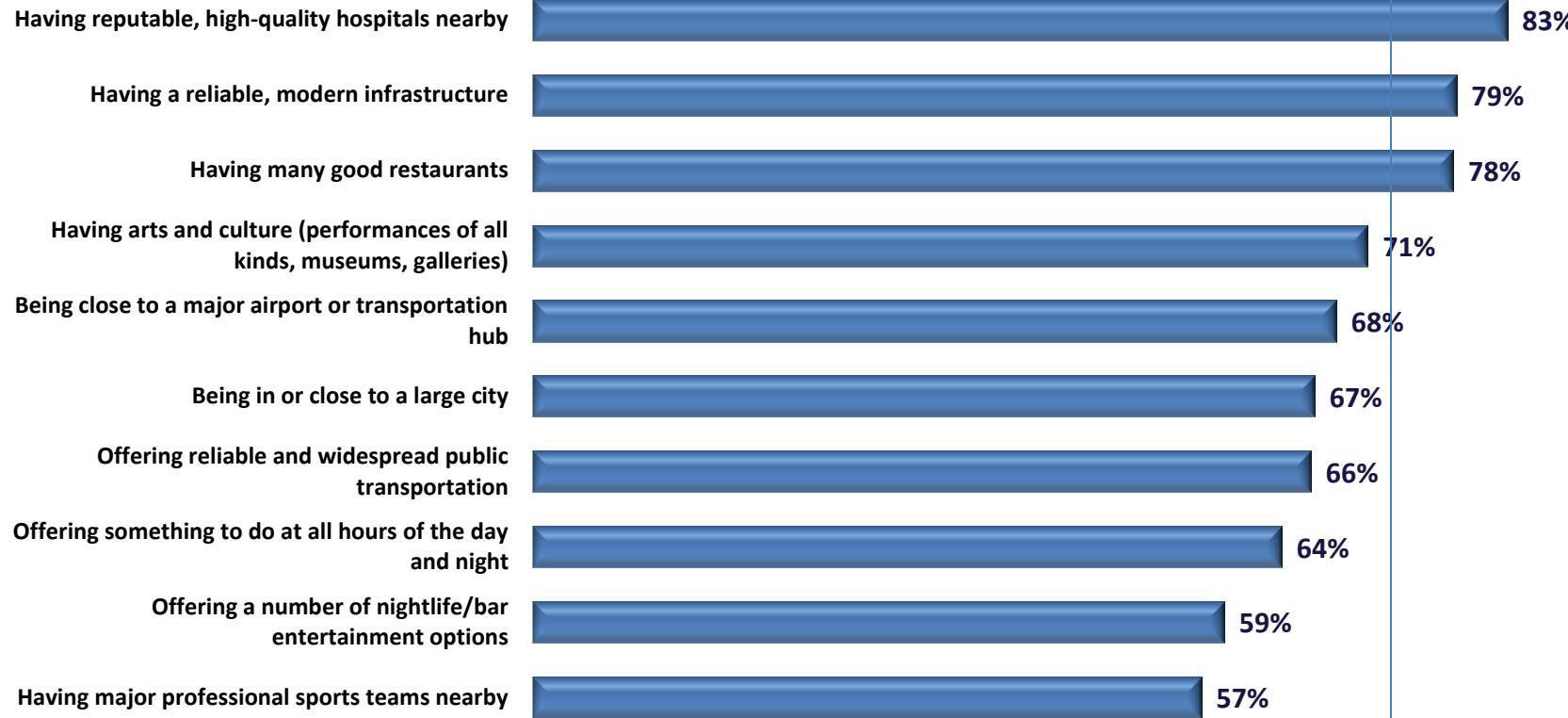
"People may consider many things when deciding where they will live. Please indicate how important each characteristic listed below would be to you, personally, if you were somehow in a position to choose a NEW place to live and work."

Quality hospitals, reliable infrastructure, and good restaurants are particularly important amenities for potential movers. After-hours entertainment is less important.

Amenities

Importance of Qualities in Choosing a Place to Live

(% 5-7 on 7-pt. scale)



Average for all items: 73%

(n=1,003)

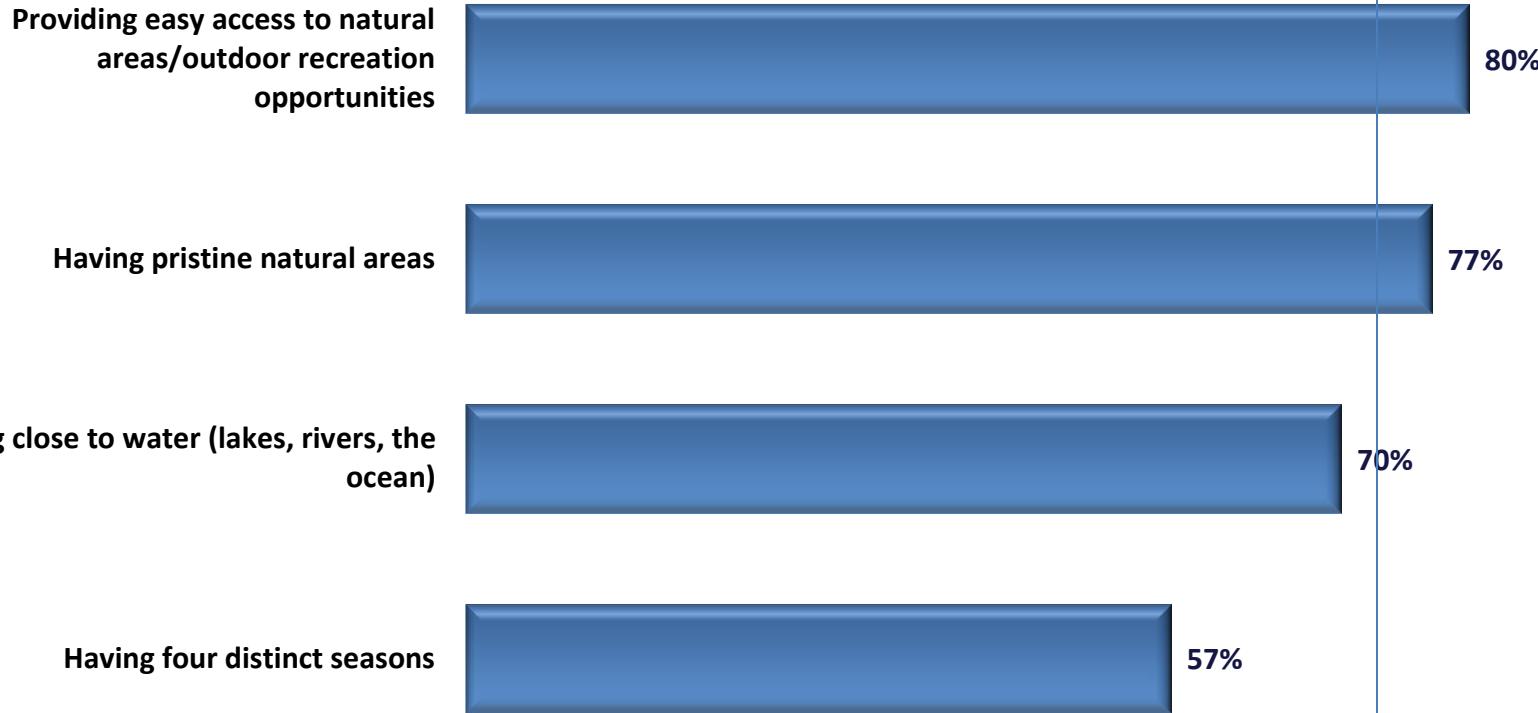
"People may consider many things when deciding where they will live. Please indicate how important each characteristic listed below would be to you, personally, if you were somehow in a position to choose a NEW place to live and work."

Substantial majorities say outdoor recreation options and pristine natural areas would be highly important in a decision about where they live.

Access to Nature

Importance of Qualities in Choosing a Place to Live

(% 5-7 on 7-pt. scale)



(n=1,003)

"People may consider many things when deciding where they will live. Please indicate how important each characteristic listed below would be to you, personally, if you were somehow in a position to choose a NEW place to live and work."

Several specific attributes are particularly important to different types of target residents for Maine.

Subgroup Differences

While all participants in this research were selected because they meet characteristics desirable for potential new residents of Maine, several *subsets* of respondents could be further targeted in order to have the most impact on the state's overall tax base and potential for future growth.

Two of these groups are young entrepreneurs and young families, described below and on subsequent pages in this report where their qualities are notably different from the general population in key characteristics.

Young entrepreneurs (defined as those age 35 or younger who own or run a business) are more likely than other potential movers to find the following factors important in a place they live:

- A slower pace of life;
- Arts and culture;
- After-hours entertainment;
- Professional sports teams;
- A reputation as a high-technology hub;
- Four distinct seasons; and
- Ethnic and cultural diversity.

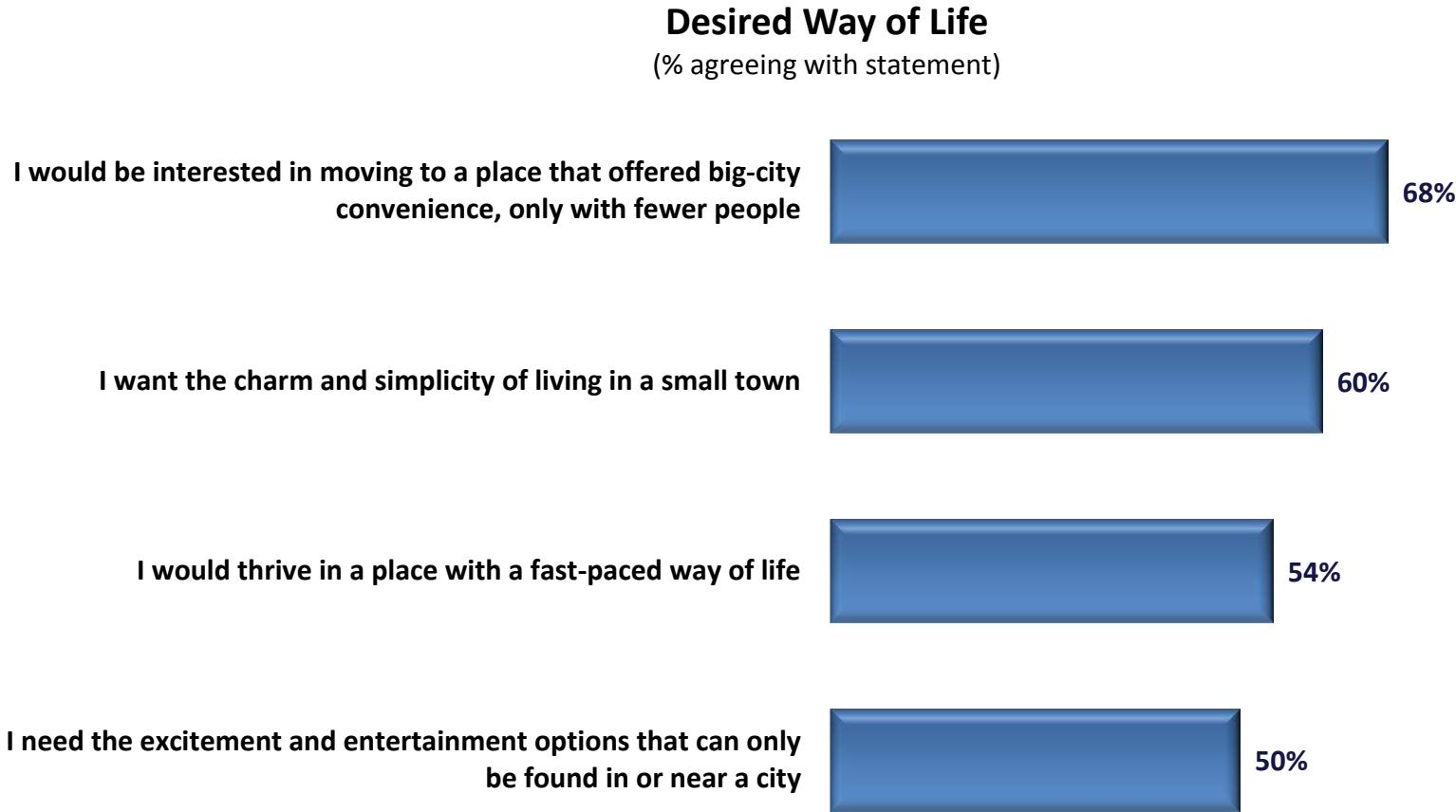
Younger families (with parents age 35 or younger who have children younger than 12 years of age) are particularly likely to be attracted to the following:

- A good place to raise a family;
- Good educational opportunities at all levels;
- A slower pace of life;
- Access to arts and culture;
- Entertainment options;
- Professional sports teams; and
- Four distinct seasons.

Big-city convenience without crowding would also be appealing for seven out of ten potential movers, and the simplicity of small-town living would be attractive for six out of ten.

At the same time, fully half need urban excitement or a fast-paced way of life.

Lifestyle



(n=1,003)

Detailed Findings

VIEWS TOWARD AREA OF CURRENT RESIDENCE

Although most acknowledge they make a number of trade-offs to live in their current area, just as many feel that where they live is special and unique.

Benefits

Views Toward Current Area

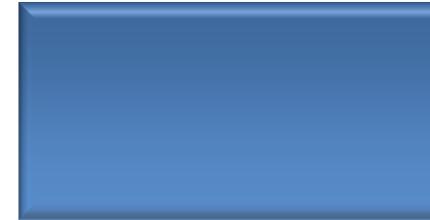
(% 5-7 on 7-pt. scale)

I feel like I make a lot of trade-offs to live where I live – balancing good things with things that I'd like to change



52%

I feel the place I live now is special and unique



51%

(n=1,003)

"To what extent would you agree or disagree with the following statements?"

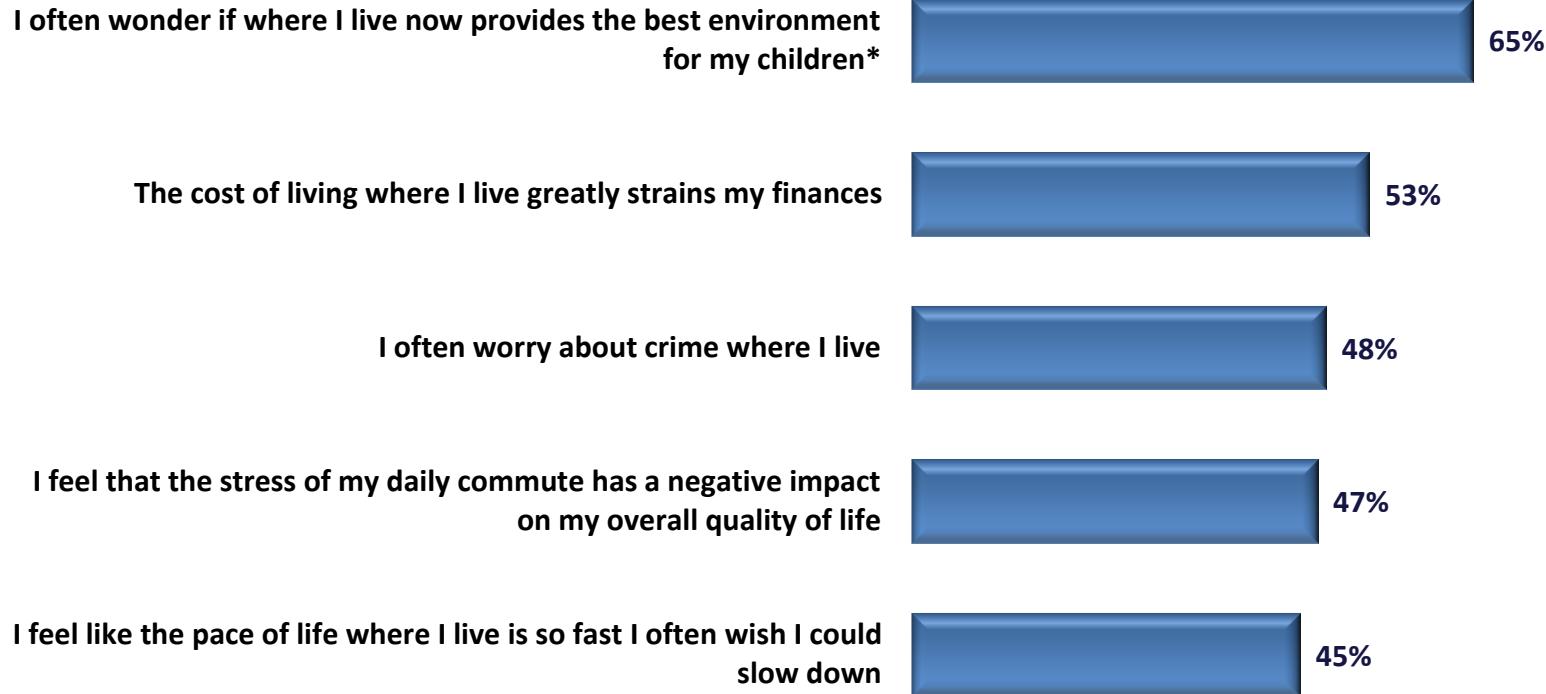
Scale: 1 ("Strongly disagree") to 7 ("Strongly agree")

Two out of three parents worry that where they live now is not the best place for their children. Many also complain about the cost of living, crime, commutes, and fast pace of life where they live now.

Quality of Life

Quality of Life Concerns

(% 5-7 on 7-pt. scale)



(n=1,003)

* (Among those with children in their household, n=565)

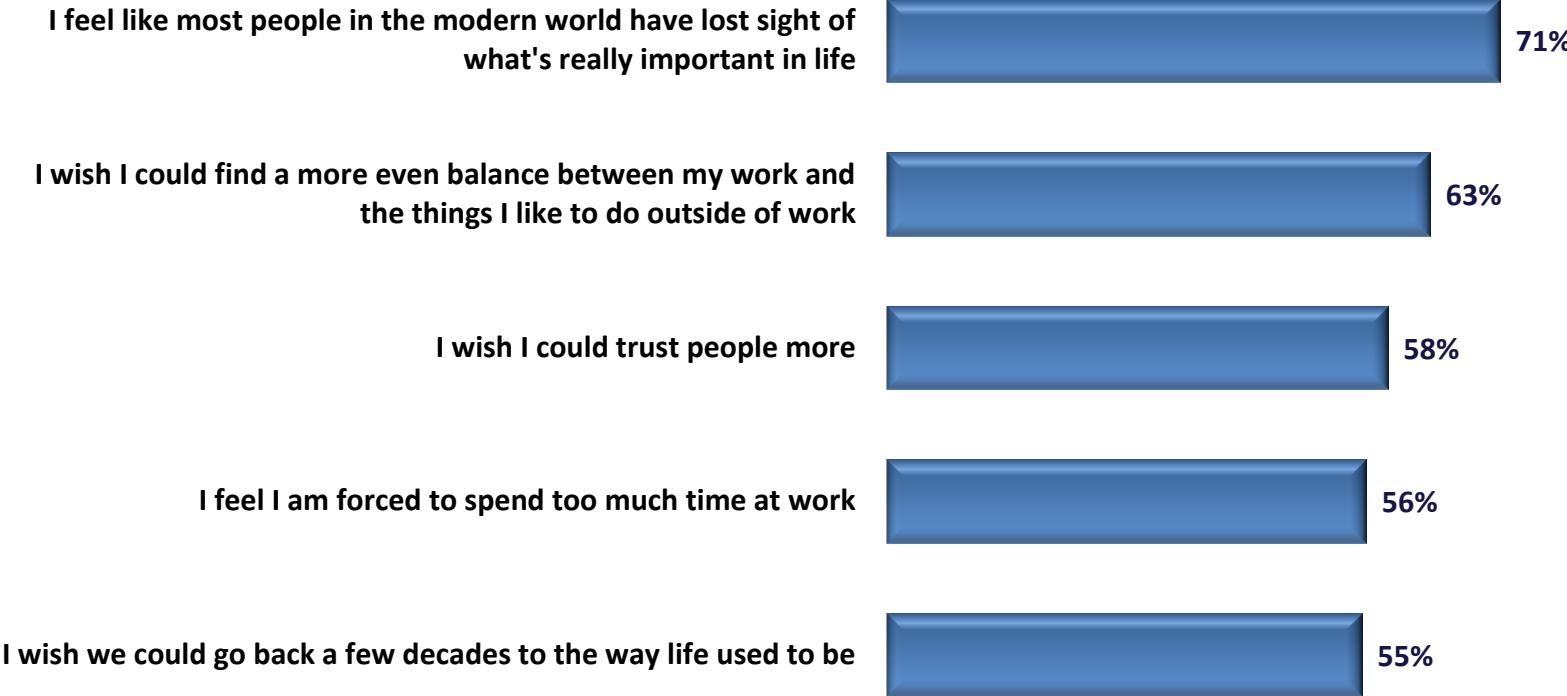
Many aspects of modern life are troubling to a majority of potential movers, from losing sight of what's important, to a lack of trust and a poor work-life balance.

More than half wish they could go back to “the way life used to be.”

Way of Life

Views Toward Modern Way of Life

(% 5-7 on 7-pt. scale)

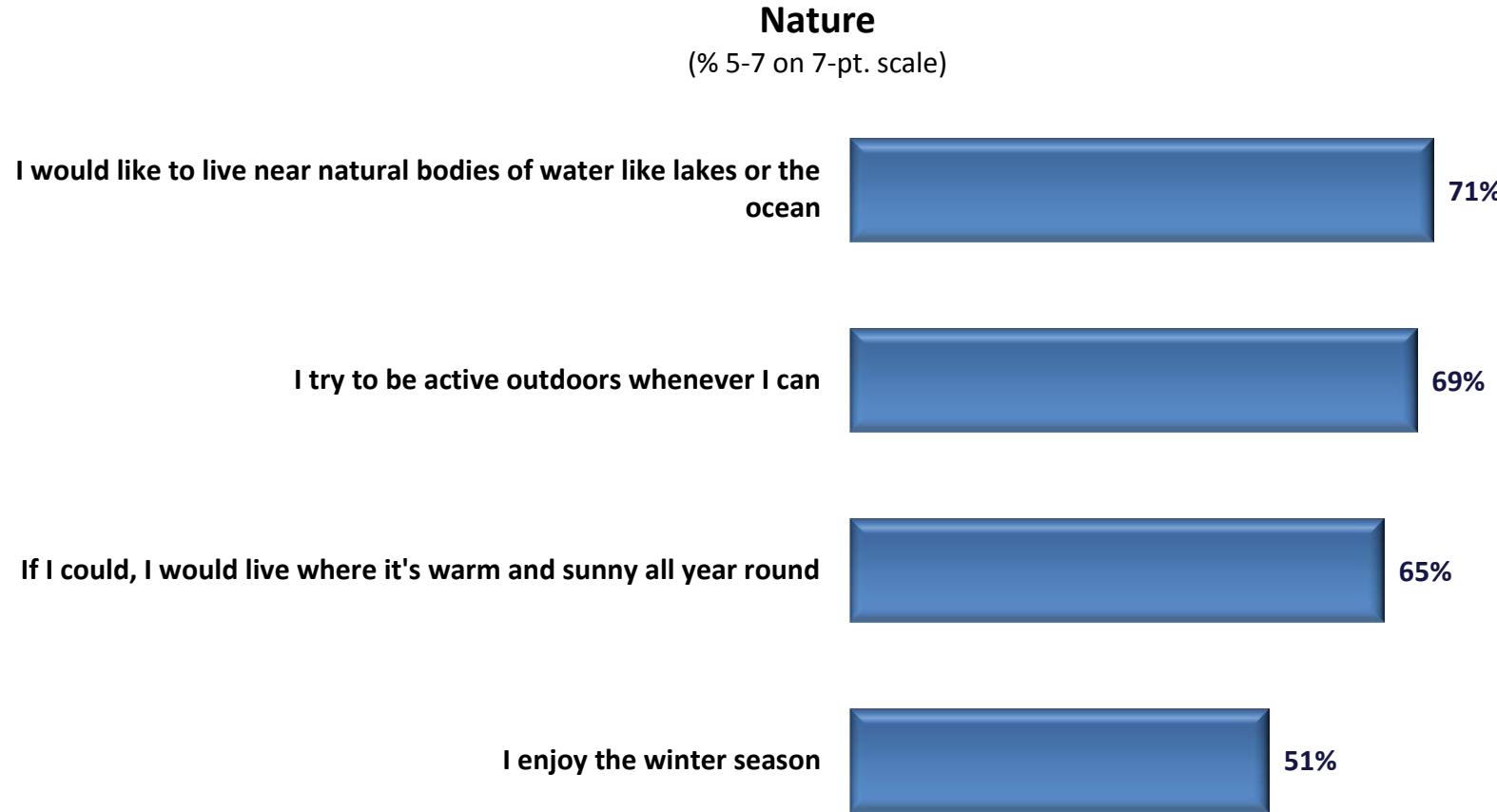


(n=1,003)

Seven out of ten would like to live by water or say they try to be outdoors whenever they can.

And while half say they enjoy the winter, a desire to live in more temperate climates is more common.

Desires for Nature



(n=1,003)

"To what extent would you agree or disagree with the following statements?"

Scale: 1 ("Strongly disagree") to 7 ("Strongly agree")

Young entrepreneurs are particularly likely to feel that where they live now does not meet their needs in several ways.

Subgroup Differences

Young entrepreneurs are particularly likely to feel that where they live now does not meet their needs.

These respondents (defined as those who are no older than 35 and who own their own business), are more likely than others to:

- Say the cost of living where they live strains their finances;
- Feel they make a lot of tradeoffs to live where they do;
- Wonder whether their current area is best for their children;
- Worry about crime;
- Say their commute has a negative impact on them;
- Wish they could slow down; and
- Enjoy the winter season.

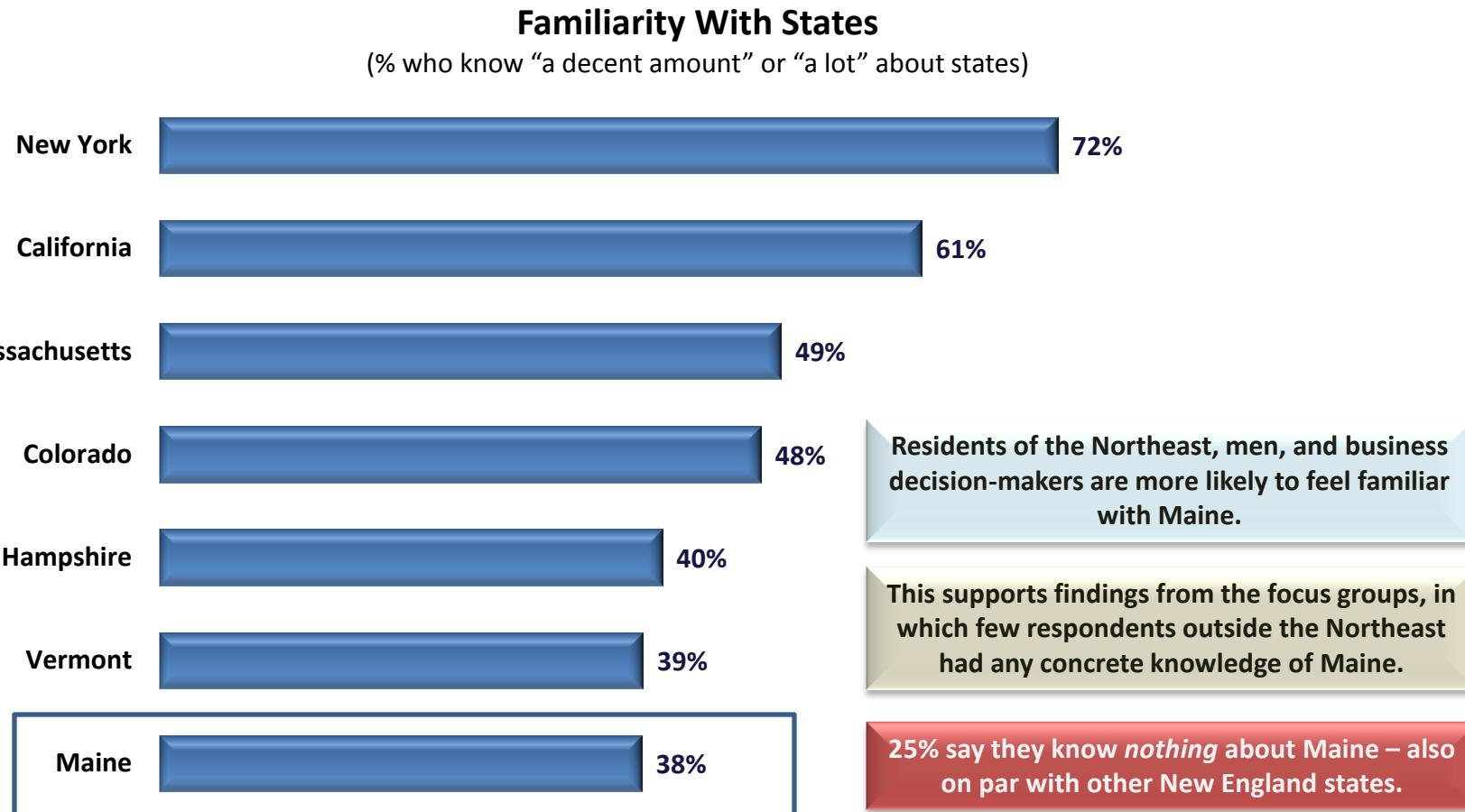
At the same time, these respondents are more likely than others to:

- Say they would thrive in a place with a fast-paced way of life;
- Feel the place they live now is unique;
- Doubt that they could have the kind of life they would want in another area;
- Say they have not considered moving anywhere else.

Detailed Findings

PERCEPTIONS OF MAINE

Four out of ten potential movers feel they know at least *a decent amount* about Maine.
That's comparable to other New England states, but below some other states in the Northeast and western parts of the country.



(n=1,003)

“How familiar are you, overall, with the following states and what it might be like to live there? Please think of anything you might know or have heard about them.”

Many have seen Maine mentioned in a broad variety of outlets – most often in the news, travel magazines, and social media. Almost half have seen some form of coverage in the past 6 months.

Ever Seen Media Coverage of Maine

News media (newspapers, TV news programs, current events shows or websites)

44%

Travel/Airline magazines

40%

Social media websites

40%

Top-10/Best-of lists (usually in magazines or online)

36%

Blogs or commentary sites

33%

Any other source

31%

% Who Have seen coverage in
Last 6 Months

28%

22%

23%

19%

16%

15%

Nearly half have seen coverage in any source within the last 6 months (45%).

The Zimmern List



(n=1,003)

"Have you seen any mention of Maine in...?"

Perceptions of Maine

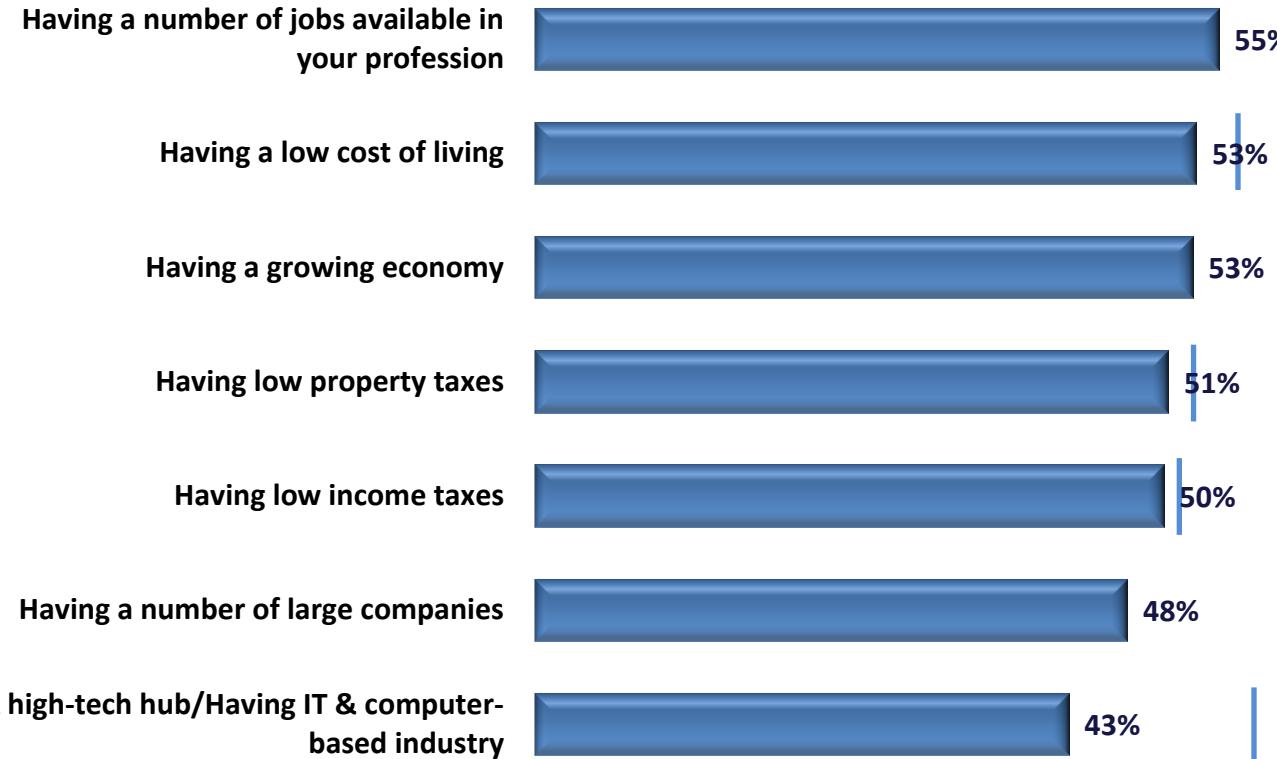
- As part of the survey, respondents were presented a list of 33 attributes they may consider when choosing a place to live and asked to rate the importance of each attribute to them, personally, if they were considering a new place to live and work.
 - The perceived importance of each of these attributes is shown in a previous section of this report.
- Respondents were *also* asked to rate the extent to which 1) the area they live in now provides each of those 33 attributes *and* 2) the extent to which they think Maine would provide each attribute.
 - Respondents were asked to rate performance on a seven-point scale, from “Does not provide at all” (1) to “Provides a great deal” (7).
- Overall ratings of performance on each attribute are shown on the following pages, with a focus on the percentage of respondents who feel that Maine provides each quality to those who live and work in the state (i.e., a rating of 5, 6, or 7 on the scale described above).
 - For comparison, equivalent ratings of the areas where respondents live now are also provided for each item.
 - These ratings are shown with blue bars, indicating how Maine performs relative to respondents’ areas of current residence.

Roughly half believe Maine performs well in a variety of economic and financial characteristics, though the state is seen as less likely than other areas to offer several of these qualities.

Economic & Financial

Maine's Qualities

(% 5-7 on 7-pt. scale)



Many focus group participants believed they would struggle to find a job in Maine, and only a few could think of any large or technology-focused companies in the state.

Rating of current area

(n=1,003)

"If you had to guess, to what extent would you say the state of Maine provides the following for those who live and work in the state?"

"How well would you say the area where you live now, overall, provides you with the following?"

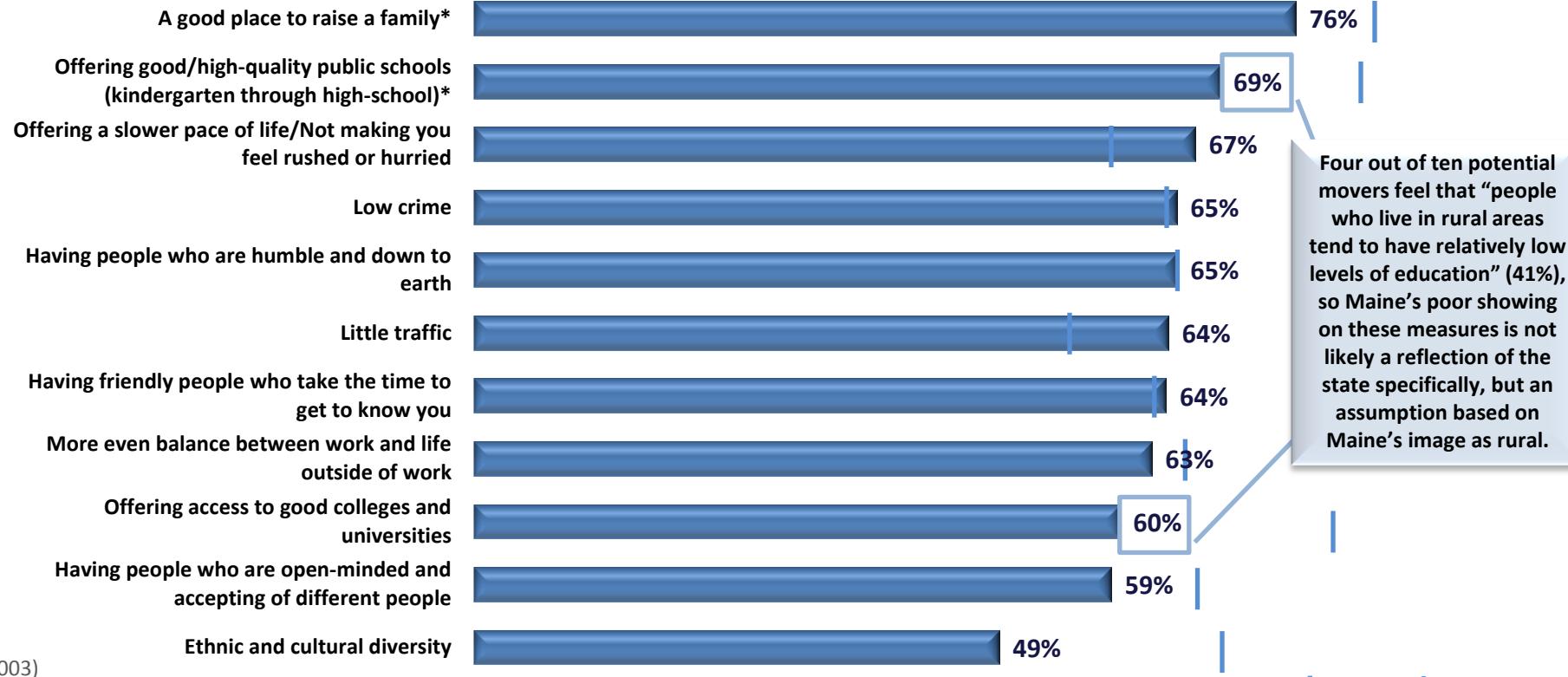
Scale: 1 ("Does not provide at all") to 7 ("Provides a great deal").

Majorities of potential movers believe Maine is strong in most of the tested quality of life measures.

While the state is believed to be as good or better than other areas in many ways, it falls short in perceived educational opportunities and diversity.

Quality of Life

Maine's Qualities
(% 5-7 on 7-pt. scale)



"If you had to guess, to what extent would you say the state of Maine provides the following for those who live and work in the state?"

"How well would you say the area where you live now, overall, provides you with the following?"

Scale of 1 ("Does not provide at all") to 7 ("Provides a great deal").

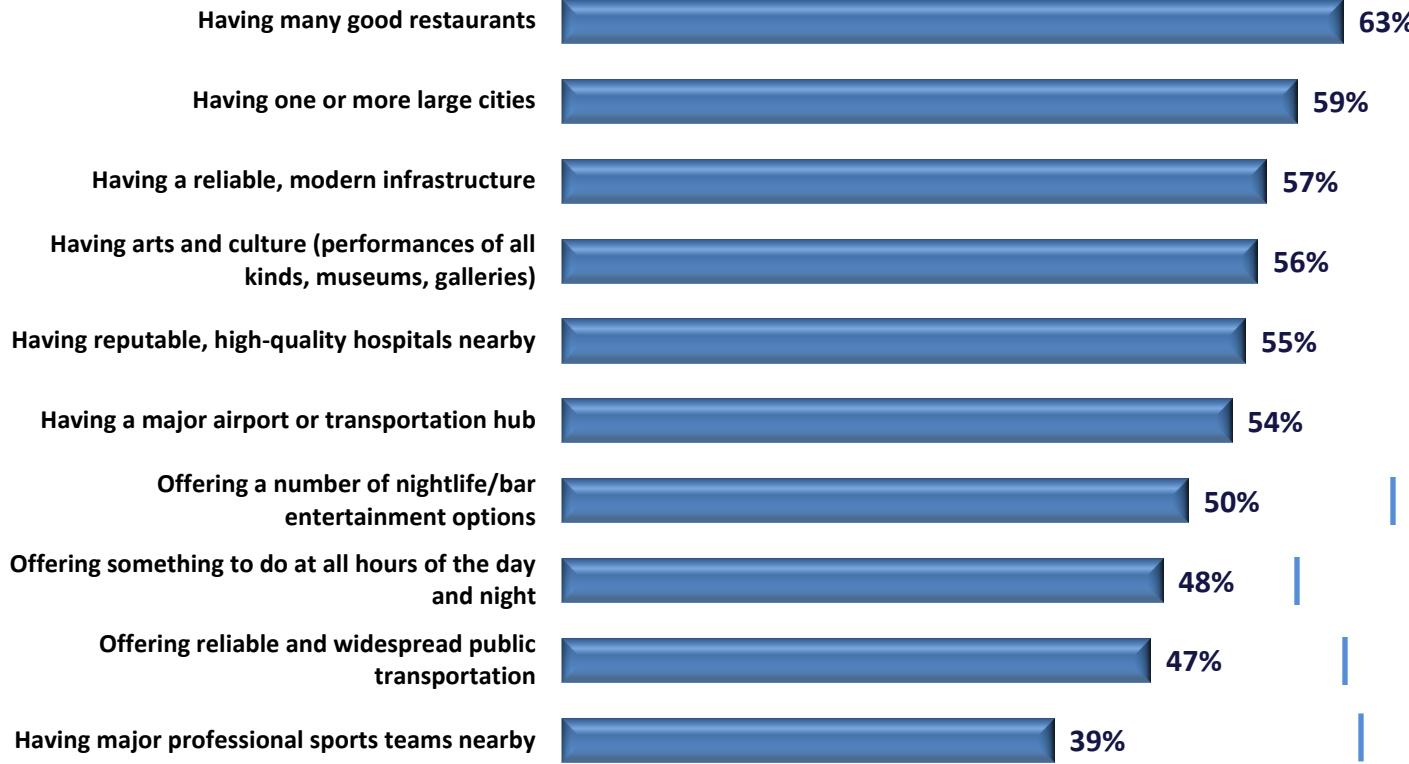
At least half believe that Maine provides most of the tested urban and cultural amenities, though the state is much less likely than other areas to be seen as offering each amenity.

Amenities

Maine's Qualities

(% 5-7 on 7-pt. scale)

Many participants in the focus groups pictured Maine as a rural, sparsely-populated state with few cultural or civic amenities.



Rating of current area

(n=1,003)

"If you had to guess, to what extent would you say the state of Maine provides the following for those who live and work in the state?"

"How well would you say the area where you live now, overall, provides you with the following?"

Scale: 1 ("Does not provide at all") to 7 ("Provides a great deal").

Substantial majorities believe that Maine offers access to nature and natural amenities.

The state is believed to be as strong as or better than other areas in providing access to nature, though it falls short in its ability to offer four distinct seasons.

Access to Nature

Maine's Qualities

(% 5-7 on 7-pt. scale)



Many focus group participants believed the state is cold year-round.

Rating of current area

(n=1,003)

If you had to guess, to what extent would you say the state of Maine provides the following for those who live and work in the state?

How well would you say the area where you live now, overall, provides you with the following?

Scale: 1 ("Does not provide at all") to 7 ("Provides a great deal").

Several subsets of potential movers are particularly likely to believe Maine offers the varied benefits listed in the survey.

Subgroup Differences

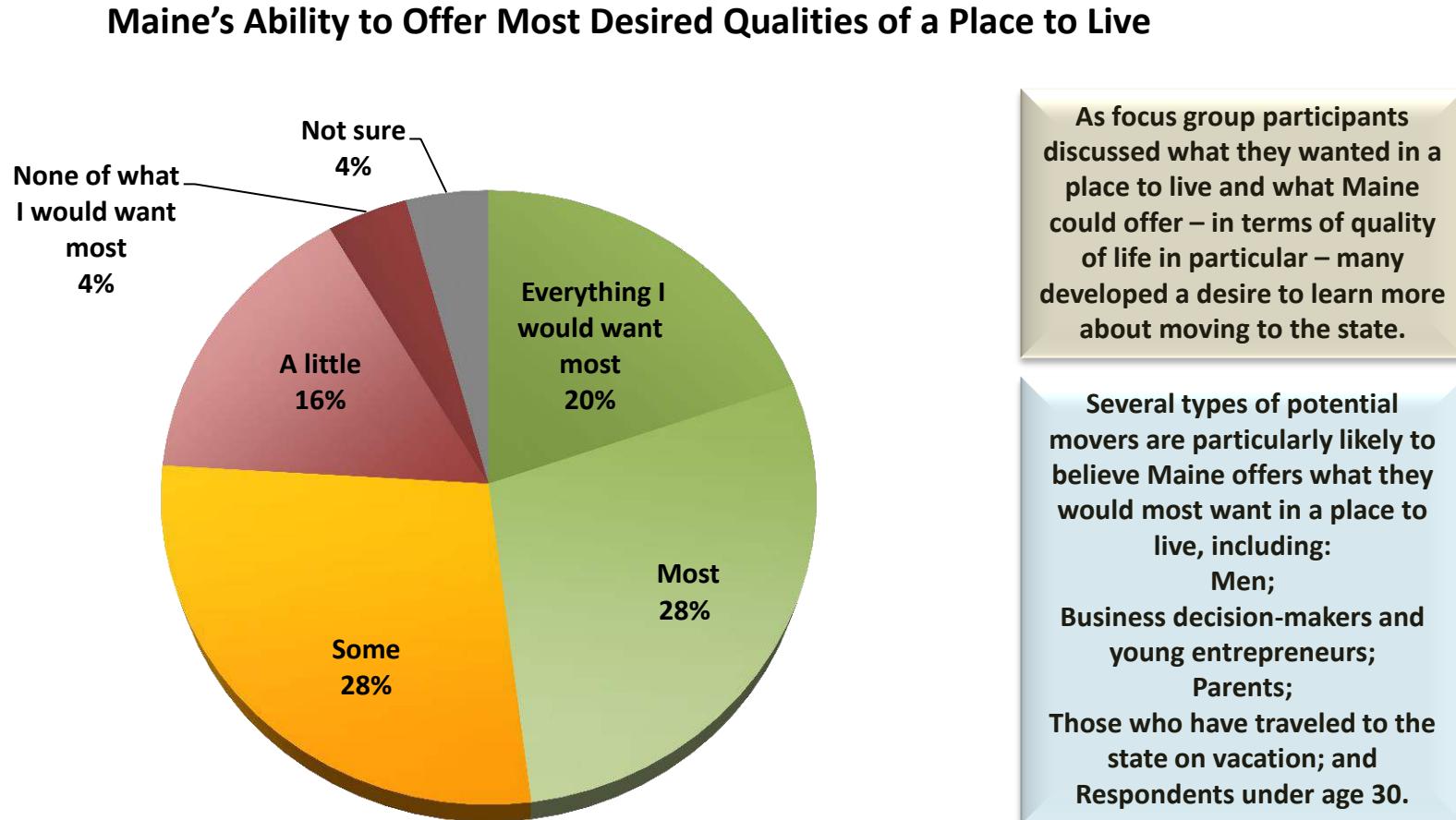
Potential movers who are between the ages of 30 and 39 and those who have children in their household are particularly likely to believe that Maine offers the quality of life, conveniences, financial benefits, and access to nature described on the previous pages.

Young entrepreneurs are more likely than others to believe that Maine offers many of the varied benefits listed in the survey, including:

- Being a good place to raise a family;
- Having down-to-earth people;
- Providing a more even balance between work and other areas of life;
- Offering good educational opportunities;
- Having open-minded people;
- Offering ethnic and cultural diversity;
- Good cultural, culinary, and entertainment options;
- Providing strong infrastructure, including airports and transportation systems;
- Offering jobs and financial benefits (including low cost of living and low taxes).

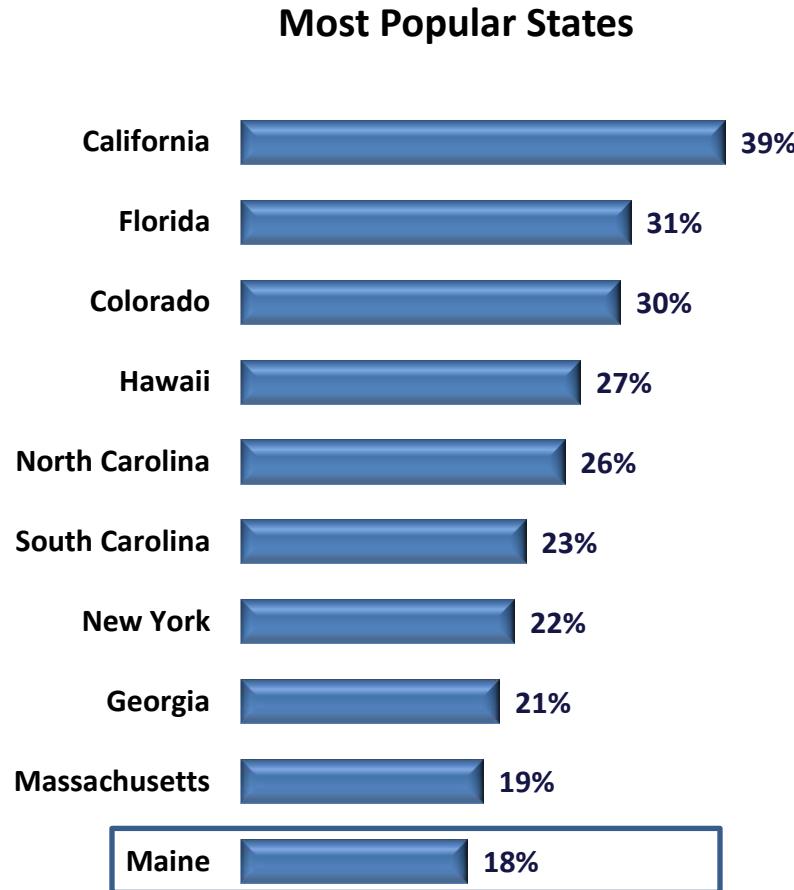
(n=1,003)

Half of all potential movers believe Maine offers *most* or *everything* they would most want in a place to live.



"One of the first questions in this survey asked you to describe in your own words what you wanted most from a place to live. If you had to guess, how much of what you said you wanted most in a place to live do you think Maine would offer you?"

Maine is tenth among all states as the most desirable state to live in, on par with Massachusetts, and behind only New York in the Northeast.



Many focus group participants likewise indicated a desire to move to southern states for the warmer weather.

Several states with no income tax were mentioned as contenders for relocation in the focus groups but did not appear ahead of Maine in this ranking, however.

Willingness to live in Maine is highest among:
Residents of New England,
Those making less than \$200,000,
and
Those who do not own a business.

When asked which state they would *most* like to live in, an additional 1% name Maine. This places the state in the middle of all jurisdictions (23rd out of the 50 states and Washington, DC).

When asked separately which state they would *never* consider living in, 10% of all respondents list Maine. Relative to other states, this reflects positively on Maine – 36 other areas (out of 51) have more resistance.

(n=1,003)

"Imagine that you had the chance to move anywhere in the country and that you could bring anyone you wanted to your new home. If all of your relocation expenses were covered and a good job was available in your new location, which states would you consider moving to?"

Maine's beauty and ocean access are the most common reasons for choosing the state over others.

Weather is, by far, the primary reason for not considering Maine.

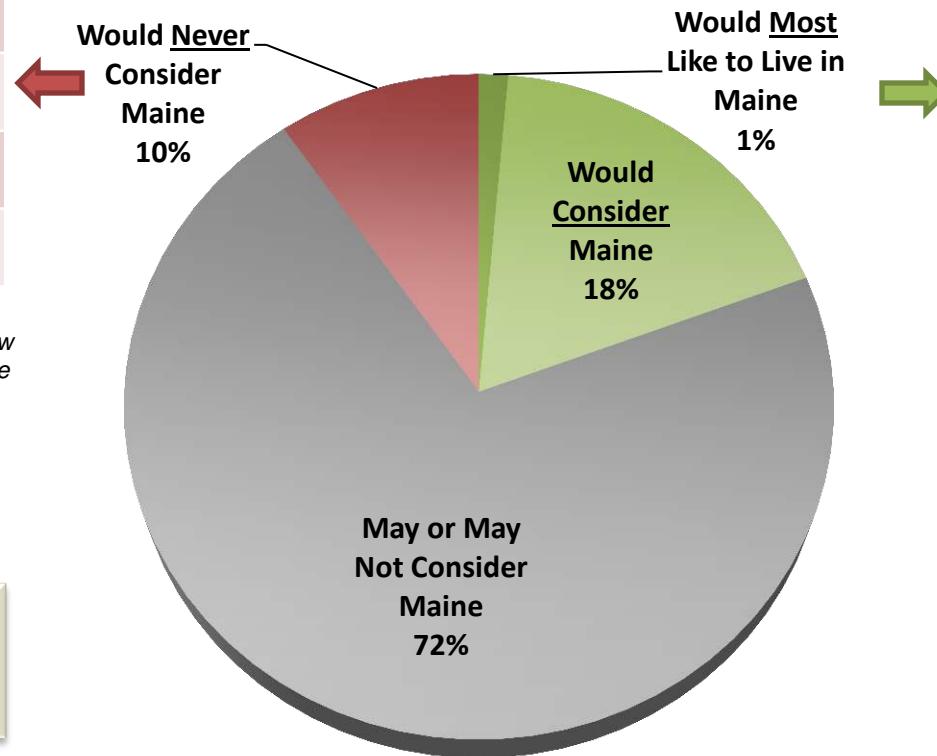
Top Reasons for Not Considering Maine (n=76)
Weather (cold/snow)
Remoteness (too far North)
Don't know enough about it
Too rural/Not urban enough

"Maine is a very rural state. It has a few cities, but none would satisfy my desire for an extremely metropolitan environment."

"There are no large cities. It feels isolated from most of the U.S. It's difficult to fly out of there."

The perception of Maine as "cold" and "distant" was more prevalent among focus group participants who had limited familiarity with the state.

Willingness to Consider Moving to Maine



Top Reasons for MOST Wanting to Live in Maine (n=26)

Beauty/Natural scenery
Ocean/Water
Food (Beer, Lobster)
Peaceful/Safe

"There are so many beautiful places...in Maine. And the large cities have a small-town feel because they don't have skyscrapers and keep the historical feel."

"I absolutely love Maine and we are actively considering moving to right outside of Portland for the beauty, quality of life, and job opportunities."

"Accessible to Boston. Beautiful nature and near water. Up and coming, nice people, good food and developing city (Portland)."

(n=1,003)

"Imagine that you had the chance to move anywhere in the country and that you could bring anyone you wanted to your new home. If all of your relocation expenses were covered and a good job was available in your new location, which states would you consider moving to?" "Which ONE state would you MOST like to live in?" "Which states, if any, would you NEVER consider living in?"

Understanding Maine's Relative Strengths and Weaknesses

- A key goal of this research is to help Maine's government and other stakeholders prioritize resources and develop a marketing strategy that will leverage the state's strengths and address or minimize its weaknesses in attracting new residents and businesses.
- In order to facilitate this, a quantitative index was created to show how Maine performs on 33 key attributes (profiled earlier in this report) *relative* to respondents' current areas of residence.
 - The index was created by directly comparing each respondent's ratings of Maine's performance on each attribute to ratings of their current area's performance on the same attribute.
 - The difference in the ratings of Maine and other areas was averaged to create an overall *relative performance score* for Maine on each attribute.
- The following page shows this relative performance score paired with the average importance of each attribute. Combining Maine's relative performance and the overall importance of each attribute shows:
 - Qualities that are important to potential movers and on which Maine is perceived to perform better than other areas. → **These are Maine's strengths, and should be highlighted in any media campaign to attract new residents.**
 - Qualities that are important to potential movers, but on which Maine is seen as performing worse than other areas, on average. → **These are Maine's weaknesses; a media campaign should attempt to minimize them, or change perceptions of the state in these areas.**
 - Qualities that are not important, and on which Maine is seen as performing worse than other areas. → **These are potential areas of growth for the state, but do not warrant being addressed, as they are not key factors in deciding where to live.**
 - Qualities that are not important, on which Maine performs better than other areas. → **None of the tested attributes could be classified in this category.**

Overall, Maine leads other areas in a number of important quality of life characteristics. It falls below other areas in its economic attributes and ability to offer culture.

Note: No attribute fell in this area, where Maine would be performing **better than average on unimportant items**.

Many focus group participants complained specifically about the cost of living, traffic, and crime where they live.
Being near natural bodies of water was particularly attractive for many.

Maine's Relative Advantages

- Slower pace of life/Not feeling rushed or hurried
- Work-life balance
- Pristine natural areas
- Good place to raise a family
- Low property taxes
- Little traffic
- Access to water (lakes, rivers, the ocean)
- Low income taxes
- Friendly people who take the time to get to know you
- People who are humble and down to earth
- Low cost of living
- Easy access to natural areas/outdoor recreation opportunities
- Low crime

Maine Is Better Than Other Areas On These Important Qualities

Maine Is Worse Than Other Areas On These Unimportant Qualities

Potential Opportunities

- Nightlife/bar entertainment options
- Major professional sports teams nearby
- High-tech hub/IT, computer-based industry
- Four distinct seasons
- Something to do at all hours of the day and night
- One or more large cities
- Large companies
- Reliable and widespread public transportation

Maine's Relative Disadvantages

- Jobs available in your profession
- Growing economy
- Major airport or transportation hub
- Reliable, modern infrastructure
- Many good restaurants
- Reputable, high-quality hospitals nearby
- Ethnic and cultural diversity
- Arts and culture (performances of all kinds, museums, galleries)
- Access to good colleges and universities
- Good/high-quality public schools (kindergarten through high-school)
- People who are open-minded and accepting

Maine Is Worse Than Other Areas On These Important Qualities

(Lower) ←

IMPORTANCE

→ (Higher)

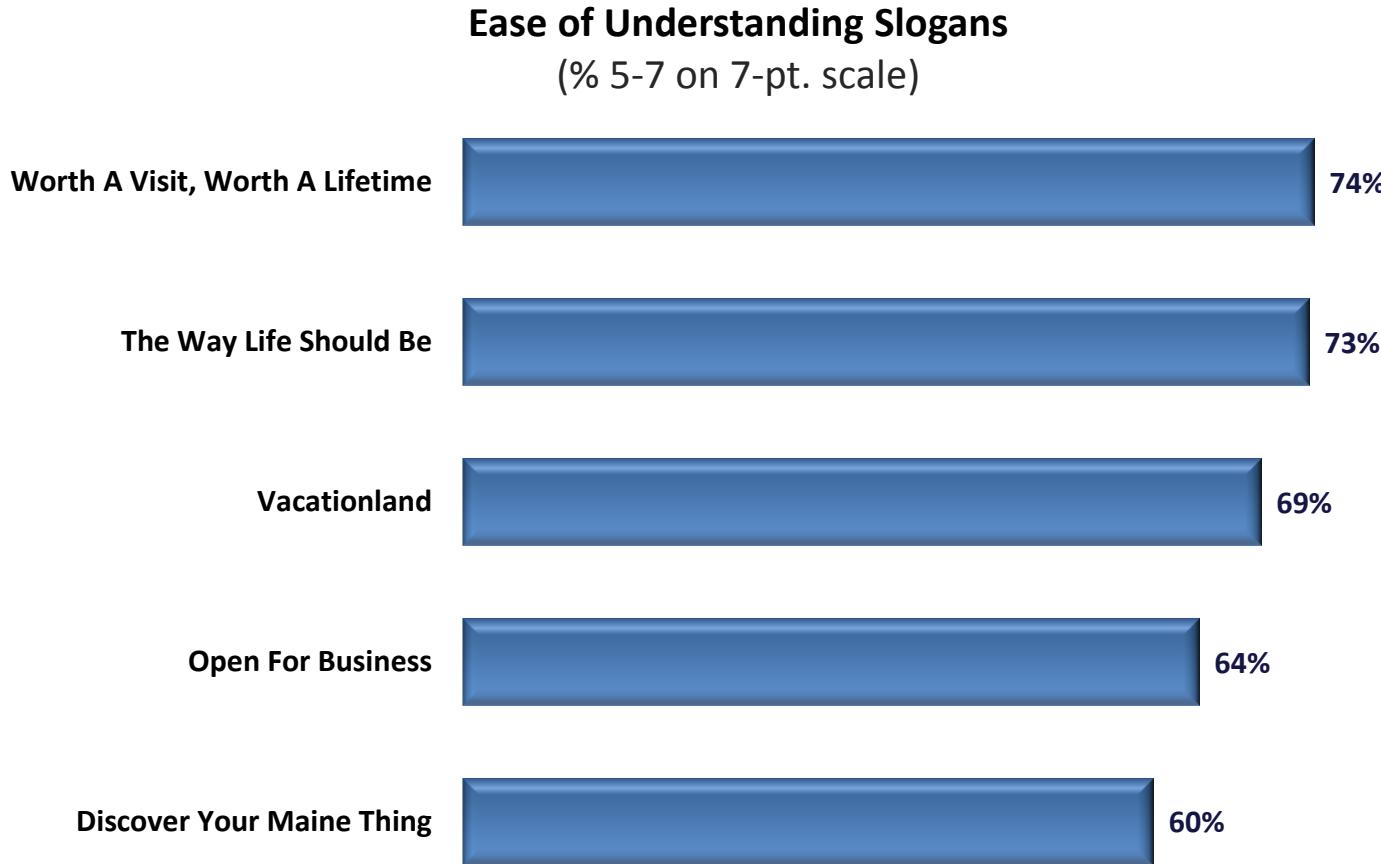
Detailed Findings

EFFECTIVENESS OF MAINE'S TAGLINES

Testing Messaging for Maine

- In order to gauge reactions to taglines the state has used to promote itself, the following five messages were tested on a variety of metrics relevant to overall appeal and impact in spurring interest in Maine as a place to live, work, and visit.
 - “Worth A Visit, Worth A Lifetime”;
 - “The Way Life Should Be”;
 - “Vacationland”;
 - “Open For Business”; and
 - “Discover Your Maine Thing.”
- Detailed views toward the taglines are shown on the following pages for all respondents, with a separate analysis of reactions among business decision-makers presented in the following section of this report.

Majorities believe that each of the tested slogans for Maine are easy to understand, though *Worth a Visit, Worth a Lifetime; The Way Life Should Be*; and *Vacationland* are the easiest to understand.



(n=1,003)

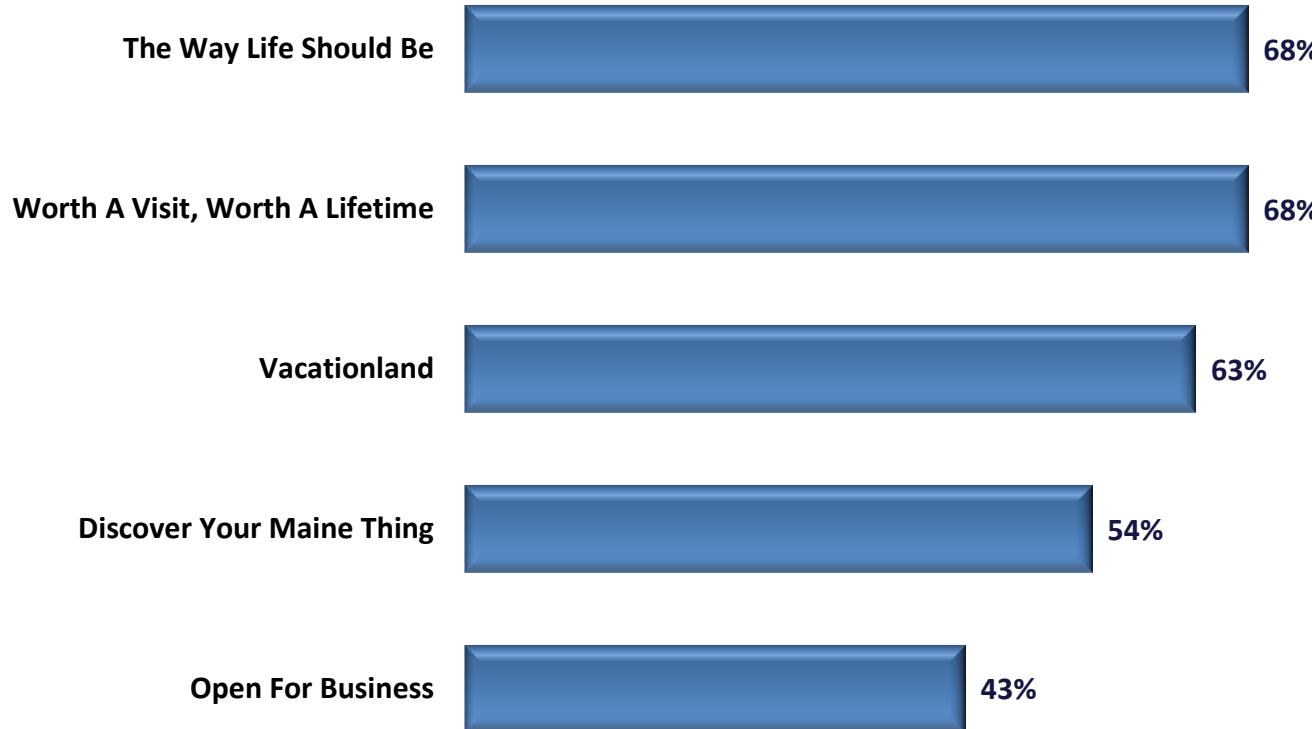
"How do you feel about this slogan? Is it easy to understand?"

Scale: 1 ("Not at all") to 7 ("Very much")

The Way Life Should Be, Worth a Visit/Lifetime, and Vacationland are most apt to encourage people to learn about visiting Maine on vacation.

Encourages Finding Out About Maine as a Place to Visit

(% 5-7 on 7-pt. scale)

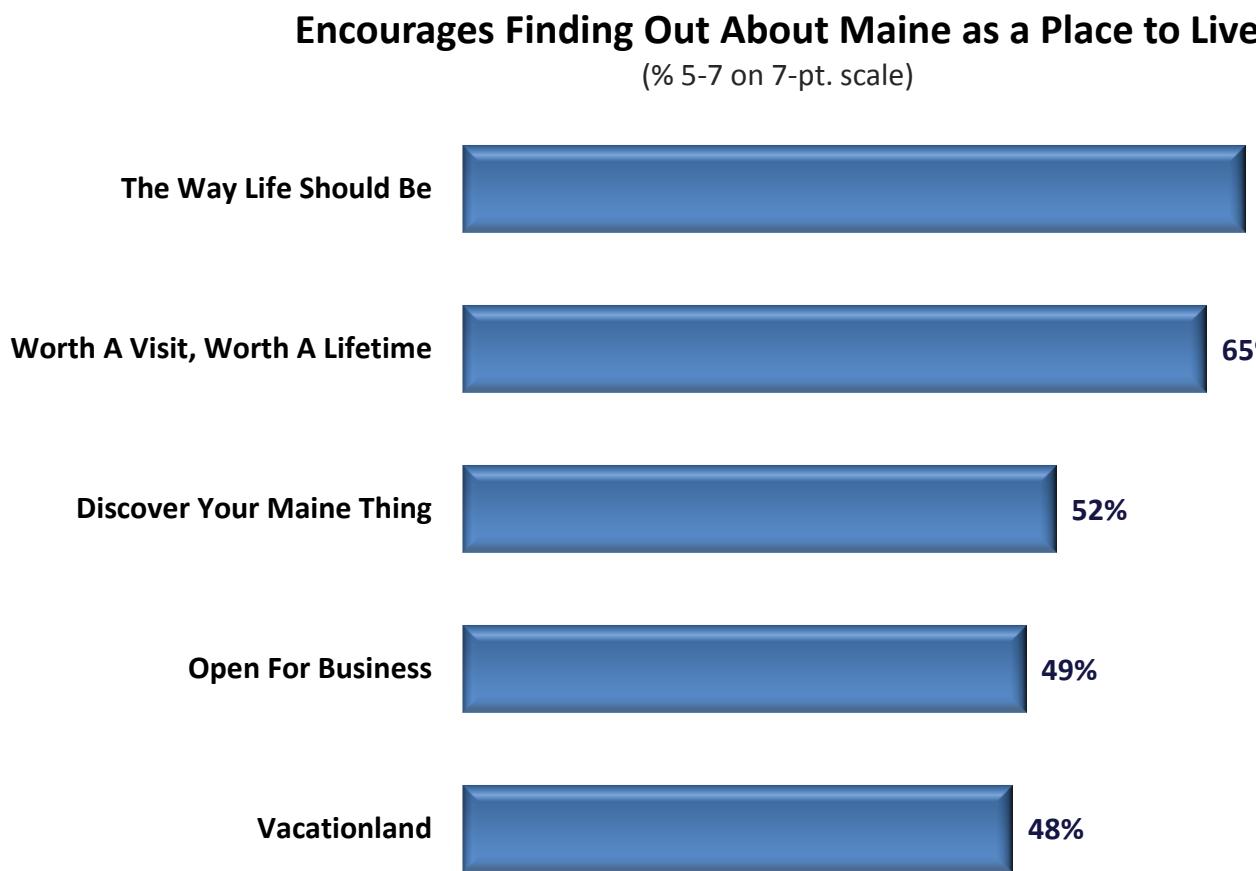


(n=1,003)

"How do you feel about this slogan? Does it encourage you to find out more about the state as a place to go for a vacation?"

Scale: 1 ("Not at all") to 7 ("Very much")

The Way Life Should Be and *Worth a Visit/Lifetime* are also the most likely to encourage people to learn about living in Maine.



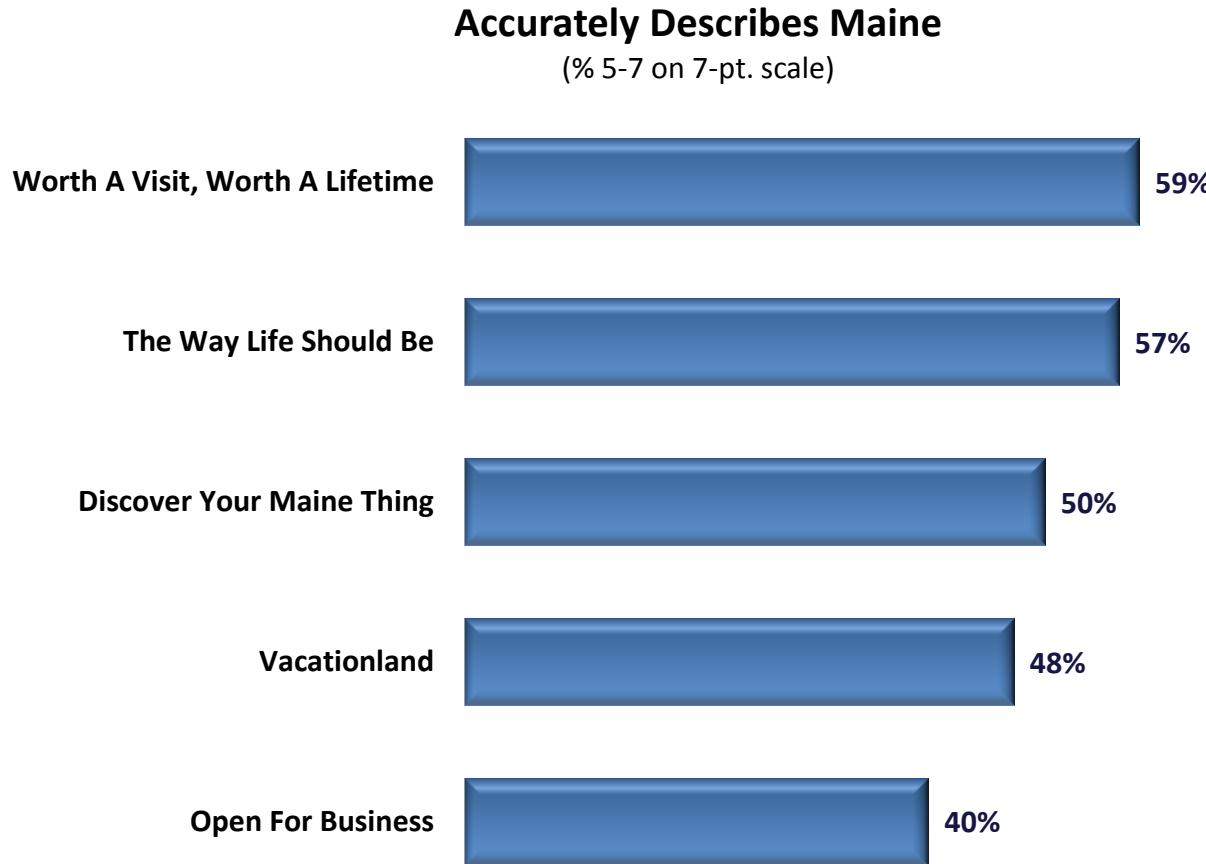
As focus group participants discussed the challenges where they live now and the prospect of living in Maine, several volunteered this slogan or a variation of it as a way to emphasize the quality of life in Maine to those who might be inclined to move there.

(n=1,003)

"How do you feel about this slogan? Does it encourage you to find out more about the state as a place to live?"

Scale: 1 ("Not at all") to 7 ("Very much")

Worth a Visit/Lifetime and *The Way Life Should Be* are the most apt to be seen as accurately describing Maine.

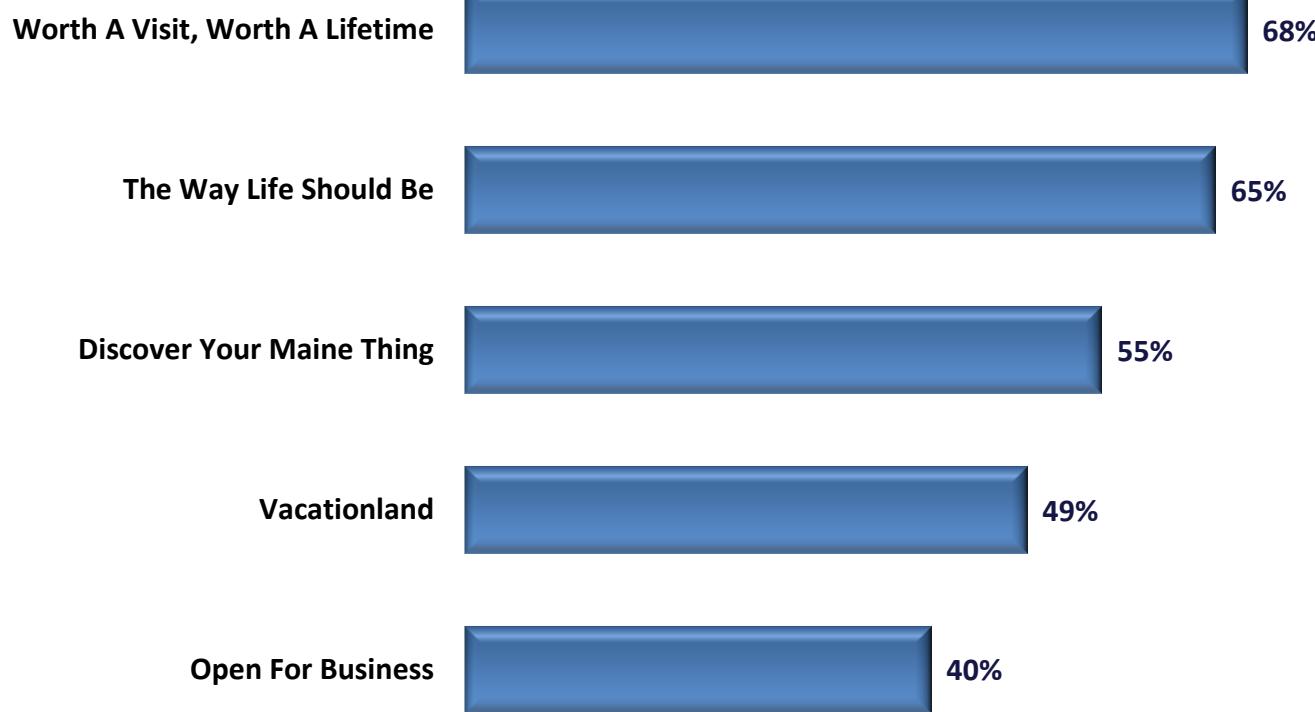


(n=1,003)

Overall, Worth a Visit/Lifetime and The Way Life Should Be
are the most popular of the tested state slogans.

Affinity for Slogans

(% 5-7 on 7-pt. scale)



(n=1,003)

*"Overall, how do you feel about these slogans that a state
may use to promote itself?"*

Scale: 1 ("Hate it") to 7 ("Love it")

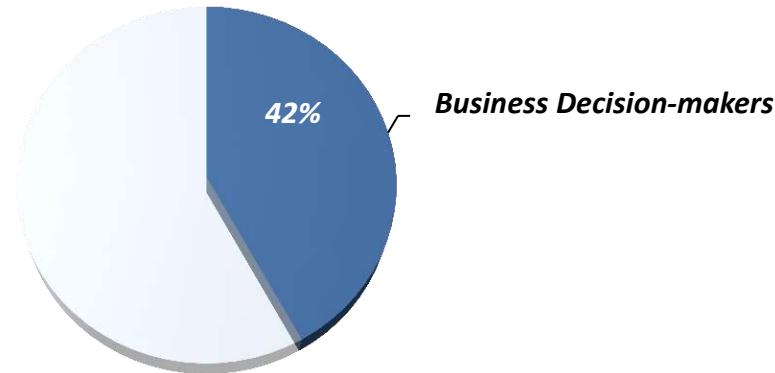
Detailed Findings

INSIGHTS FROM BUSINESS DECISION-MAKERS

Many potential movers in the target population are business decision-makers.

- As part of the survey, respondents who make decisions for a business were asked several questions to gauge their perspective and reactions to issues from a business-person's perspective.
- These questions focused on the attributes they would look for in an area if they were moving or expanding their business there; their views on how well these needs would be met by where they live now and by Maine; and their views about whether the tagline "Open for Business" would encourage them to find out more about Maine as a place to do business.
- Out of 1,003 respondents who completed the survey, a total of 419 (amounting to 42%) own or influence a business as a CEO or act as the primary decision-maker in where that business is located.
- Responses from those individuals are profiled on the following pages.

Prevalence of Business Decision-makers



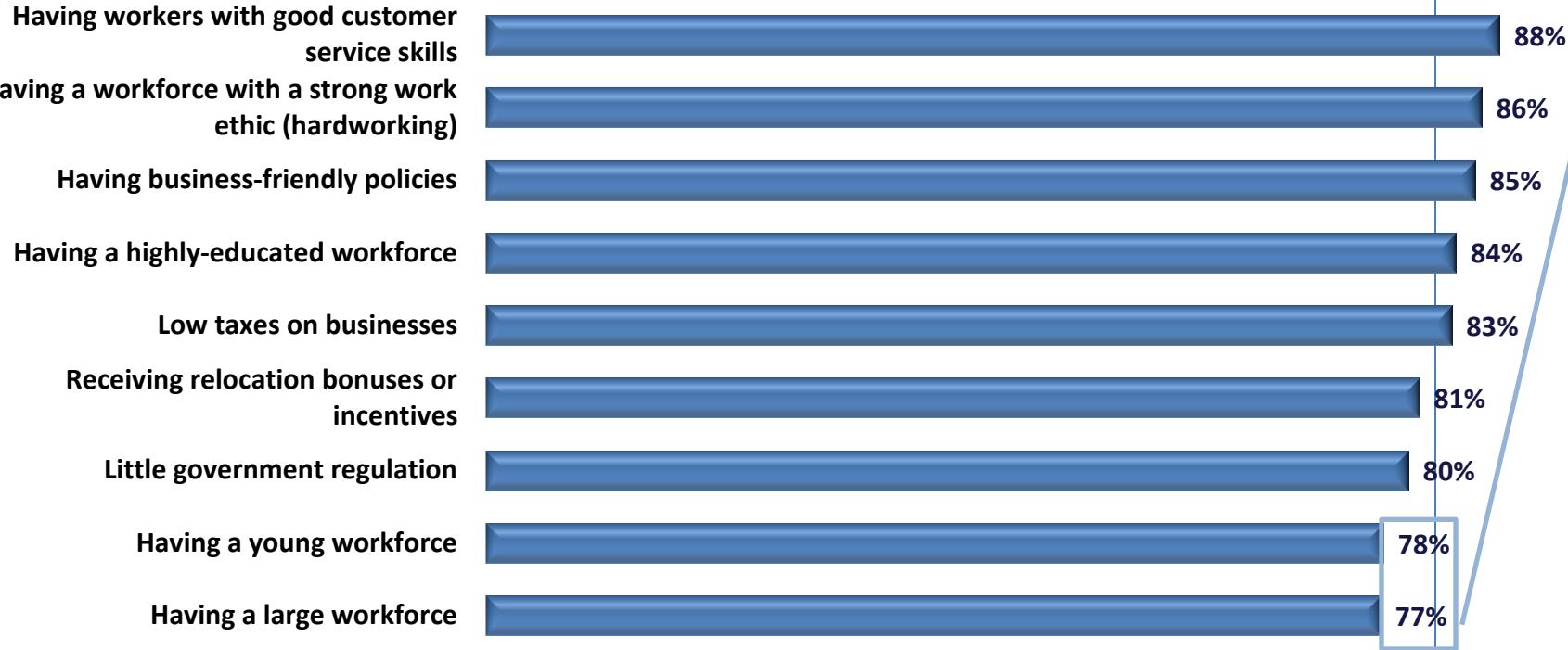
"Do you own or influence a business as a CEO, or act as the primary decision-maker on where that business is located?"

Large majorities of business decision-makers feel the tested workforce and business environment attributes are important.

Business Attributes

Many business owners in the focus groups complained about the lack of a work ethic in their employees, citing it as a major barrier to their ability to run their businesses.

Importantly for Maine, a workforce's youth and size are among the least important of these qualities. Skills, work ethic, and business climate are generally more important.



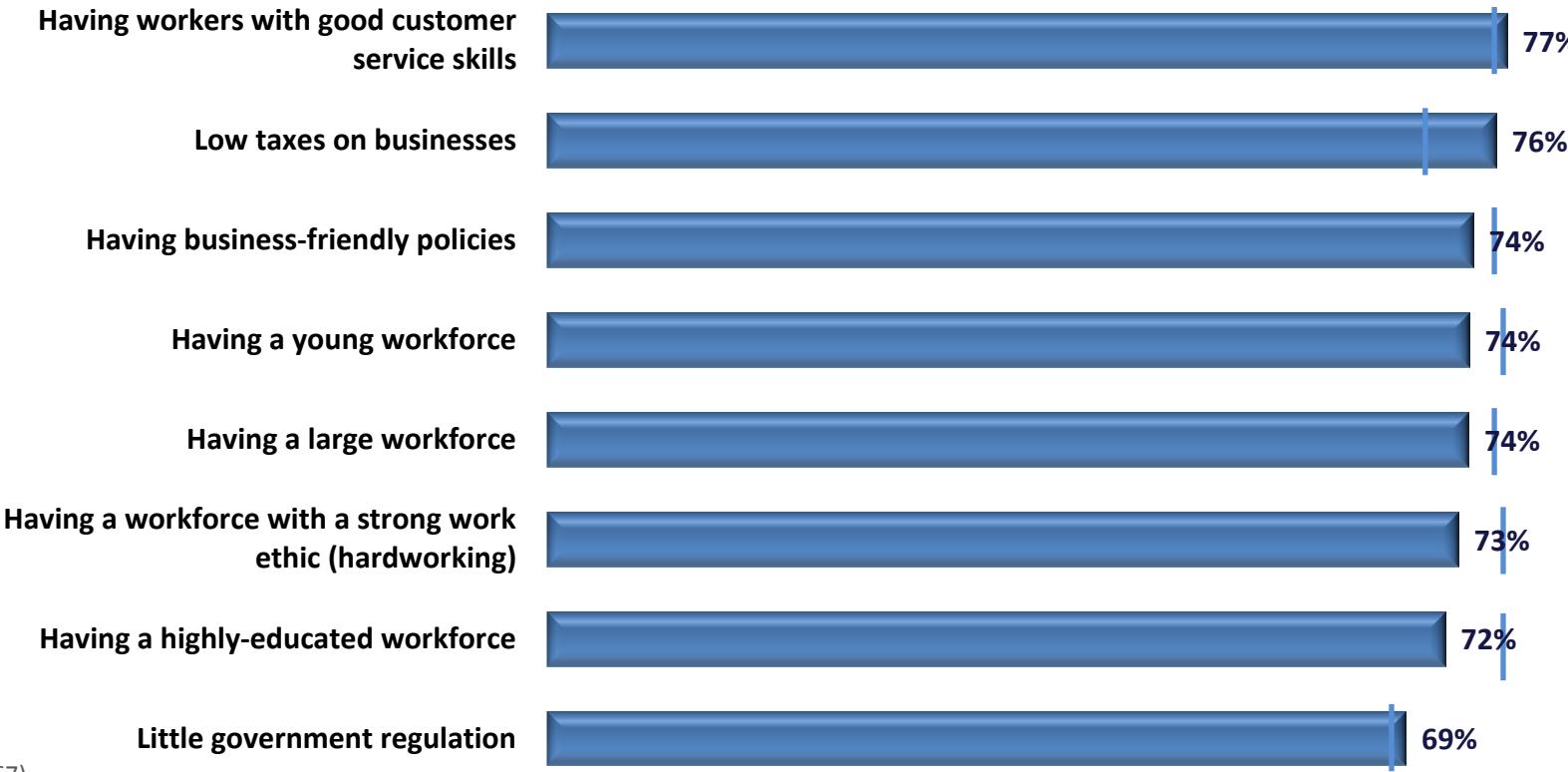
"As someone who owns or manages a business, how important would the following be for you in deciding where to operate your business, assuming you were going to move or expand to a market in another state."

Large majorities of business decision-makers believe Maine offers each of the tested business attributes, placing it about even, overall, with other areas.

Business Attributes

Maine's Qualities

(% 5-7 on 7-pt. scale)



If you had to guess, to what extent would you say the state of Maine provides the following for those who run a business in the state?"

"How well would you say the area where you live now, overall, provides you with the following?"

Scale: 1 ("Does not provide at all") to 7 ("Provides a great deal")

Business decision-makers generally think Maine is on par with or better than other areas in what it offers businesses, especially the business climate provided by the government.

→ (Better)

MAINE'S PERFORMANCE

(Worse) ←

Note: No attribute fell in this area, where Maine would be performing better than average on unimportant items.

IMPORTANCE

→ (Higher)

Maine Is Better Than Other Areas
On These Important QualitiesMaine Is Worse Than Other Areas
On These Important Qualities

Maine's Relative Advantages

- Little government regulation
- Business-friendly policies
- Low-taxes
- Highly-educated workforce
- A workforce with good customer service skills

Maine's Relative Disadvantages

- Young workforce
- Strong work ethic (hardworking)
- Large workforce

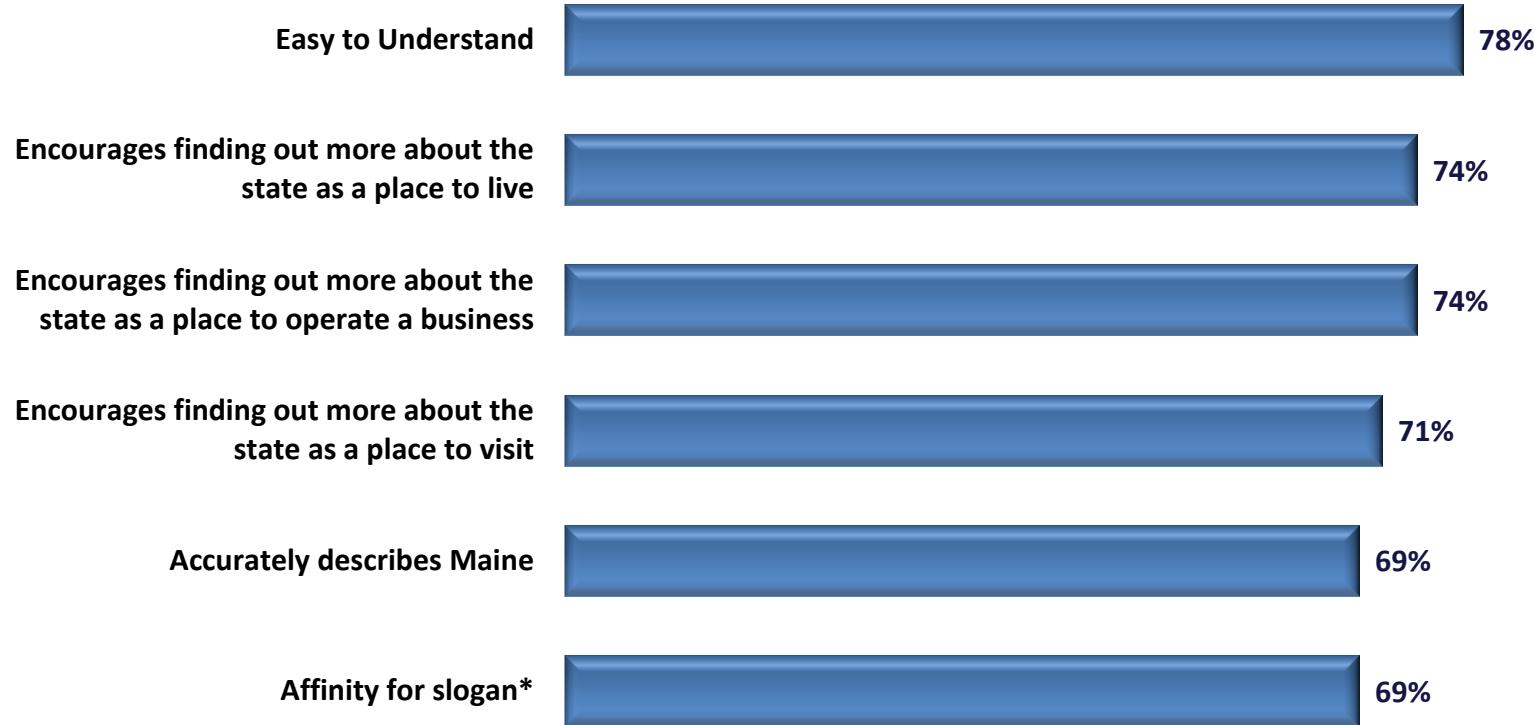
Note: No item fell in this area, where Maine would be performing worse than average on unimportant items.

(Lower) ←

The slogan *Open for Business* is popular among large majorities of business decision-makers.

Views Toward “Open for Business” Slogan

(% 5-7 on 7-pt. scale)



(n=367)

Among business decision-makers

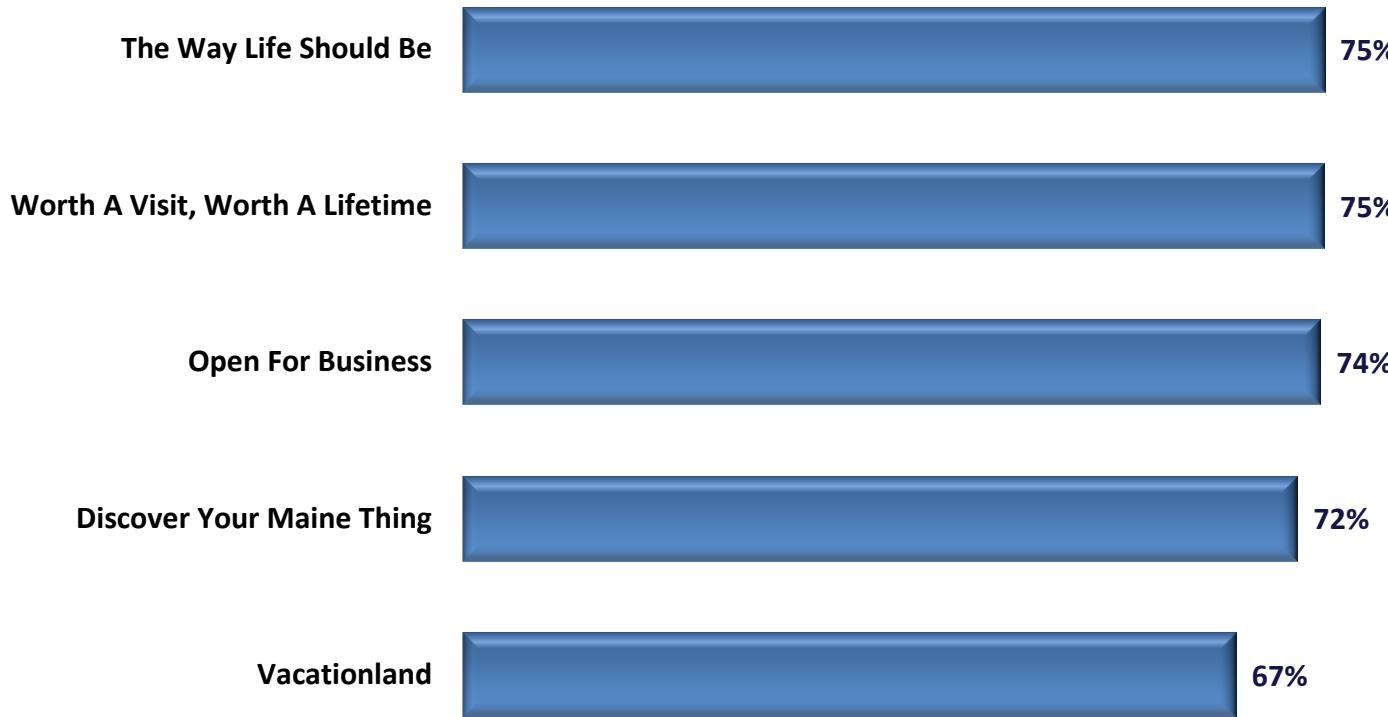
“How do you feel about this slogan?

Scale: 1 (“Not at all”) to 7 (“Very much”)

*Scale: 1 (“Hate it”) to 7 (“Love it”)

Overall, most of the tested slogans are equally effective in encouraging business decision-makers to find out about Maine as a place to run their business.

Slogans' Encouragement to Learn About Running a Business in Maine
(% 5-7 on 7-pt. scale)



(n=367)

Among business decision-makers

Detailed Findings

PROFILE OF SURVEY RESPONDENTS

Demographics

Gender	
Male	50%
Female	50%
Employment Status	
Employed full-time	93%
Employed part-time	7%
Business Ownership	
Owner/Decision-maker	42%
Education	
College Graduate	52%
Graduate Work/Degree	48%
Marital Status	
Presently married	61%
Single, never married	32%
Divorced	6%
Separated	*
Widowed	*

Race/Ethnicity	
White or Caucasian	78%
African American	10%
Asian or Pacific Islander	7%
Hispanic or Latino	6%
Native American	2%
Middle Eastern	*
Another race/ethnicity	1%

Traveler Segment (Targets)	
Balanced Achievers	49%
Genuine Originals	13%
Social Sophisticates	9%

Average Age	
35	

Average Income	
\$106,000	

Region	
New England	8%
Mid-Atlantic	24%
East & West North Central	31%
South Atlantic	36%

Frequency of Working Remotely	
All the time	23%
Most of the time	11%
Some of the time	15%
A little	15%
Never	36%

Household Composition	
Children in Household	67%
Children younger than 6	28%
Children 6-11	35%
Children 12-17	31%

* <0.5%

Demographics

Media Usage	
National network morning news shows	62%
Twitter	53%
Travel magazines	43%
NPR (National Public Radio)	40%

Frequency of Telecommuting	
All the time	23%
Most of the time	11%
Some of the time	15%
A little	15%
Never	36%

Industry	
Health care and social assistance	13%
Information technology/Computer programming	13%
Educational services	12%
Finance and insurance	8%
Manufacturing	6%
Administrative and support	5%
Construction	5%
Government/Military/Law Enforcement	5%
Retail sales or trade	5%
Professional, scientific and technical services	4%
Arts, entertainment, and recreation	2%
Management of companies and enterprises	2%
Transportation and warehousing	2%
Accommodation and food services	2%
Agriculture, forestry, fishing & hunting	1%
Real estate (including rental and leasing)	1%
Central administrative office activity	1%
Wholesale sales or trade	1%
Utilities	1%
Another industry	12%