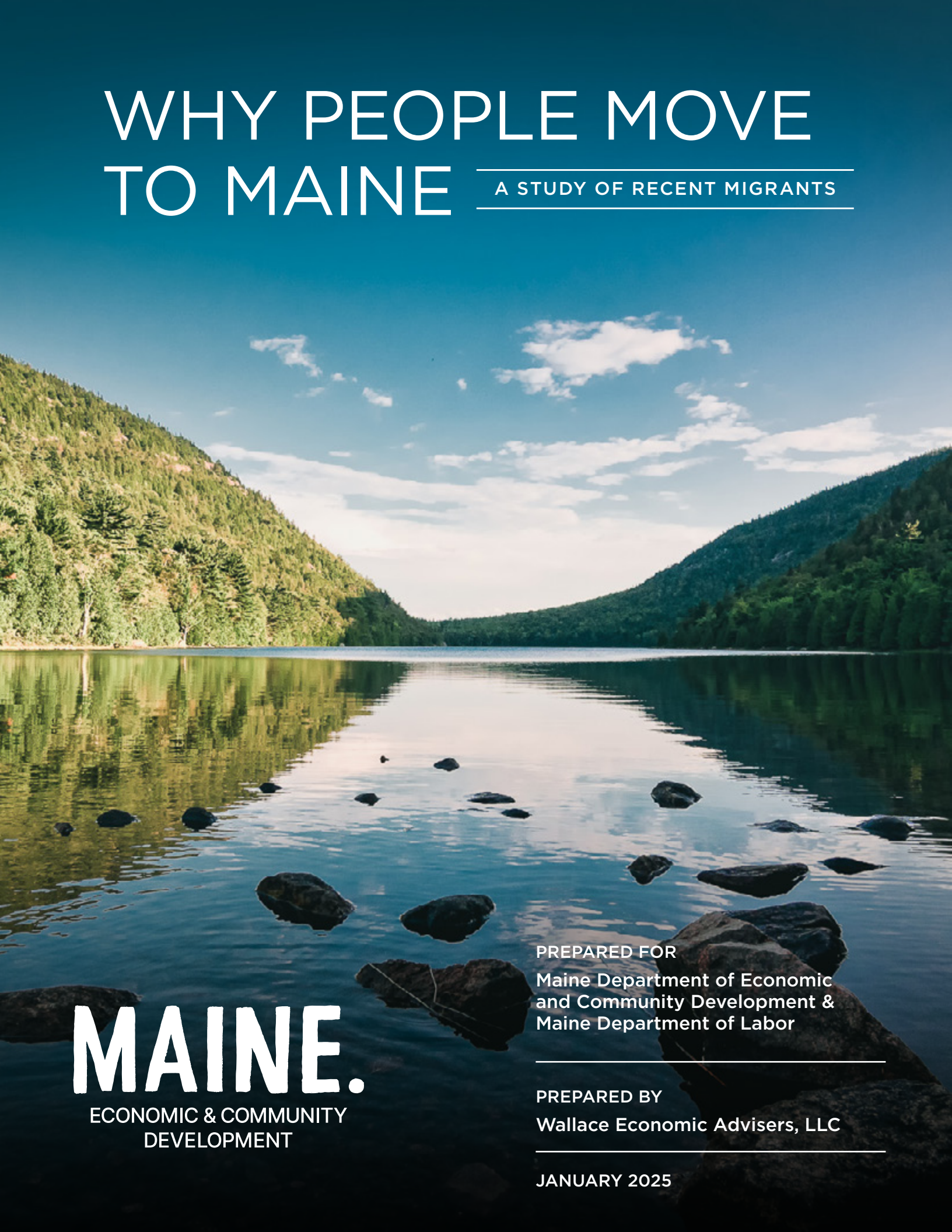


WHY PEOPLE MOVE TO MAINE

A STUDY OF RECENT MIGRANTS



MAINE.

ECONOMIC & COMMUNITY
DEVELOPMENT

PREPARED FOR
Maine Department of Economic
and Community Development &
Maine Department of Labor

PREPARED BY
Wallace Economic Advisers, LLC

JANUARY 2025

contents

Table of Figures	4
Executive Summary	6
OVERVIEW	6
SUMMARY OF FINDINGS	7
Background	10
PREVIOUS RESEARCH ON MIGRATION PREFERENCES IN MAINE	12
REPORT OVERVIEW	12
Methods and Report Scope	13
SURVEY AND SAMPLING STRATEGY	13
SAMPLE REPRESENTATION AND LIMITATIONS	14
EVALUATING DIFFERENCES IN PREFERENCES ACROSS AGE COHORTS AND GEOGRAPHY	15
Demographic and Household Characteristics	18
ORIGIN OF MIGRANTS	18
RACE AND ETHNICITY, IMMIGRATION, AND VETERAN STATUS	19
HOUSEHOLD CHARACTERISTICS	20
COMMUNITY ENGAGEMENT	25

Economic and Employment Characteristics 26

EMPLOYMENT STATUS.....	27
CLASS OF WORKER.....	28
SELF-EMPLOYMENT.....	32
REMOTE WORK PREVALENCE.....	34
EMPLOYER LOCATION.....	34
EMPLOYMENT CONTINUITY.....	34
REMOTE WORK AND THE DECISION TO MOVE TO MAINE.....	36
EMPLOYMENT CONSIDERATION WITH MAINE-BASED EMPLOYER.....	36

Connections and Motivations for Moving to Maine 38

PREVIOUS EXPERIENCE OR CONNECTIONS WITH MAINE.....	38
FACTORS OF INFLUENCE IN DECISION TO MOVE TO MAINE.....	40
ALTERNATIVE REGIONS CONSIDERED.....	45
CLIMATE, HOUSING, AND INCENTIVES.....	47

Discussion and Conclusion 52

End Notes 53

Acknowledgements 55



Table of Figures

FIGURE 1:	YEAR OF MOVE TO MAINE REPORTED BY SURVEY RESPONDENTS	13
FIGURE 2:	AGE COHORT OF MIGRANT RESPONDENTS (SELF ONLY, NO OTHER HOUSEHOLD) .	15
FIGURE 3:	MAINE TOURISM REGIONS	16
FIGURE 4:	REGIONAL DISTRIBUTION OF MIGRANT LICENSE REGISTRATIONS AND SURVEY RESPONDENTS.	17
FIGURE 5:	REGIONAL DISTRIBUTION OF SURVEY RESPONDENTS BY AGE COHORT	17
FIGURE 6:	WHERE SURVEY RESPONDENTS MOVED FROM.	18
FIGURE 7:	HOUSEHOLD COMPOSITION OF MIGRANTS BY AGE COHORT	21
FIGURE 8:	HOUSEHOLD COMPOSITION OF MIGRANTS BY REGION	21
FIGURE 9:	NUMBER OF OWN CHILDREN IN HOUSEHOLDS OF MIGRANTS	22
FIGURE 10:	HOUSING ARRANGEMENTS OF MIGRANTS	22
FIGURE 11:	HOUSING ARRANGEMENTS OF MIGRANTS BY AGE.	23
FIGURE 12:	MIGRANT HOUSEHOLD INCOME	23
FIGURE 13:	MIGRANT HOUSEHOLD INCOME BY REGION	24
FIGURE 14:	COMMUNITY ENGAGEMENT ACTIVITIES OF MIGRANTS	25
FIGURE 15:	EMPLOYMENT STATUS OF MIGRANTS AND PARTNER OR SPOUSE	27
FIGURE 16:	MIGRANT CLASS OF WORKER FOR SELF AND PARTNER OR SPOUSE	29
FIGURE 17:	MIGRANT EDUCATIONAL ATTAINMENT, SELF AND SPOUSE / PARTNER	29
FIGURE 18:	OCCUPATION OF EMPLOYED MIGRANTS AND PARTNER OR SPOUSE.	31
FIGURE 19:	SELF-EMPLOYMENT BY AGE.	32
FIGURE 20:	WORK LOCATION OF SELF-EMPLOYED MIGRANTS.	33
FIGURE 21:	MOTIVATIONS FOR STARTING A BUSINESS IN MAINE.	33
FIGURE 22:	REMOTE WORK ARRANGEMENTS OF MIGRANTS	34
FIGURE 23:	PRESENCE OF EMPLOYING ORGANIZATION IN MAINE AND REMOTE WORK	35
FIGURE 24:	PREVIOUSLY EMPLOYED BY EMPLOYER	35
FIGURE 25:	HOW DID THE ABILITY TO WORK REMOTELY FACTOR INTO YOUR DECISION TO MOVE TO MAINE?	37

FIGURE 26: REASONS FOR CONSIDERING OR NOT CONSIDERING EMPLOYMENT WITH A MAINE-BASED EMPLOYER	37
FIGURE 27: PREVIOUS EXPERIENCES OR CONNECTIONS TO MAINE, EITHER SELF AND PARTNER OR SPOUSE	38
FIGURE 28: PREVIOUS EXPERIENCES OF CONNECTIONS FOR SELECTED FACTORS BY REGION.....	39
FIGURE 29: RELATIVE WEIGHTING INDEX OF THE FACTORS THAT INFLUENCED THE DECISION TO MOVE TO MAINE	41
FIGURE 30: SCALE OF FACTOR INFLUENCE FOR OUTDOOR RECREATION AMENITIES AND SOCIAL CONNECTIONS	42
FIGURE 31: SCALE OF FACTOR INFLUENCE FOR COMMUNITY SAFETY AND COST OF LIVING	42
FIGURE 32: SCALE OF FACTOR INFLUENCE FOR A CULTURAL OPENNESS AND POLITICAL CLIMATE.....	43
FIGURE 33: SCALE OF FACTOR INFLUENCE FOR EMPLOYMENT OPPORTUNITY AND ABILITY TO WORK REMOTELY	44
FIGURE 34: SCALE OF FACTOR INFLUENCE FOR PANDEMIC MOTIVATED AND FAMILY CIRCUMSTANCES	46
FIGURE 35: SCALE FACTOR INFLUENCE FOR CULTURAL AMENITIES AND ENTERTAINMENT....	46
FIGURE 36: ALTERNATIVE STATES CONSIDERED	47
FIGURE 37: INFLUENCE OF CLIMATE AND WEATHER	48
FIGURE 38: THE INFLUENCE OF HOUSING ON DECISION TO MOVE TO MAINE	49
FIGURE 39: THE INFLUENCE OF STATE OR REGIONAL FINANCIAL INCENTIVES	50
FIGURE 40: INTENTIONS TO CONTINUE LIVING AND WORKING IN MAINE	51
FIGURE 41: REASONS FOR CONSIDERING A MOVE OUT OF MAINE	51

Executive Summary

OVERVIEW

Attracting population and workforce talent to Maine is a core goal of the state's 10-year economic development strategy to mitigate the effects of an aging population and projected workforce deficits. Since the 2020 pandemic, net migration to Maine has remained substantially positive, although the extent to which these trends will continue is unclear. The state is actively working to stimulate and sustain the net in migration of workers and household. In support of this effort—and other employers and organizations in the state engaging in workforce attraction and recruitment—this report provides foundational data and insights into the characteristics and motivations of people who move to and establish residency in Maine.

The analysis draws upon an extensive electronic survey of more than 2,500 migrant responses collected during the spring of 2024. The sample draws from a database of driver's license registrants of more than 80,000 persons who used reciprocity from another state from 2019 through 2023 ("BMV data"). New residents of the state are required to obtain a Maine driver's license once establishing residency. From this perspective, the population and sample provide a strong representation of people who have moved to Maine and are committing to living in the state for a substantial amount of time. Compared to U.S. Census in-migration estimates, the database of driver's license registrants likely excludes the vast majority of more transient populations, such as students that move to attend college or seasonal workers, which are captured in Census estimates. As such, the analysis and data on the migrant population presented here best represents people who have recently moved to Maine and have established residency, demonstrating a commitment to live and work in the state, which may differ from estimates of in-migration reported by the U.S. Census.

Despite this, there are limitations in the generalizability of findings to all in-migrants due to the nature of the survey, including potential limited coverage of international migrants, self-selection bias, and electronic convenience bias, among other potential impacts. Furthermore, the BMV dataset population itself possibly under- or over-represents certain population groups, which may bias results. For example, older cohorts (aged 65 and over) may be over-represented, and younger cohorts (aged 25–34) may be under-represented, which is reflected in the final survey sample. This may have impacts on employment and labor force participation estimates. For example—employment shares may be undercounted if retirees make up a disproportionate share of responses.¹ Still, this method follows previous research on migration characteristics of Maine migrants, and, based on our analysis, the data provides useful insights into why people move to Maine.

In addition to fundamental individual and household demographic, economic and employment characteristics, the analysis evaluates the role of remote work arrangements, self-employment, previous connections to Maine, and the influence of a number of place-based factors on the decision to move to Maine. Responses are evaluated across age cohorts representative of different "life stages" and tourism regions of the state that reflect unique natural amenities and characteristics.

SUMMARY OF FINDINGS

THE DEMOGRAPHIC AND HOUSEHOLD CHARACTERISTICS OF MIGRANTS

The Northeast U.S. was a common origin for migrant households (40% of respondents), including Massachusetts (19.1%), New Hampshire (8.1%), and New York (6.8%). In comparison, the states of California (6.2%) and Florida (5.2%) were also reported as the origin of move for over 11% of respondents. Based on driver's license registrations, almost half of all migrants settled in the state's southern regions, including Southern Maine (York County) and Greater Portland. Older aged migrants and their households were more likely to settle in the Midcoast region, as well as Downeast and Acadia and the Southern Maine and Beaches region compared to other regions. Migrant households in the Highlands region, which includes the Bangor metropolitan area and the Greater Portland and Casco Bay region, skewed younger. The majority of recent migrant households plan to stay in Maine. Three-quarters of respondents indicated they had no plans to leave the state, while 7% are presently considering moving outside the state.

The majority of respondents (66%) reported moving to Maine with a partner or spouse, while 25% reported moving alone, and 16% reported moving with school-aged children to the state. Migrants were largely white (92%) and more likely to own their homes (75%), consistent with statewide rates. Respondents are highly engaged with their local communities—just one percent of migrants reported *no* community engagement activities at this time.

Respondents reported higher levels of educational attainment and household incomes well above the state median. Three-quarters of respondents reported holding a Bachelor's degree or higher. In contrast, more than 50% of migrant households reported incomes of \$100,000 or more, compared to the state median household income of approximately \$75,000.

THE ECONOMIC AND EMPLOYMENT CHARACTERISTICS OF MIGRANTS

One of the state's core economic development goals is to attract 75,000 new workers into the workforce to support Maine employers. Attracting workers from out-of-state is a key component. Despite substantial positive net migration in recent years, not all migrants are advancing this goal.

Figure S-1 reports the employment status of migrant respondents. Virtually all migrants in the labor force are employed, with just a small percentage (2%) of respondents reporting being unemployed and searching for work (both self and a partner or spouse). Fifty-five percent (55%) of migrant respondents were currently employed, including both full and part-time, while a partner or spouse was working 53% of the time. Over one-third of respondents and a partner or spouse identified as retired. However, some caution is warranted when generalizing these estimates to the actual migrant population. As mentioned previously, the population from which the sample represents (BMV data) may undercount younger populations and overcount older populations. If this is the case, the implications would be that the actual share of employed migrants may be higher while the share of retired migrants may be lower than those represented in Figure S-1.

Employment Status	Self	Partner or Spouse
Working full-time	46.1%	44.2%
Retired	35.4%	38.0%
Working part-time	9.3%	9.2%
Other	2.6%	2.2%
Stay-at-home parent or caregiver	1.9%	2.4%
Not formally employed— not searching	1.9%	1.8%
Not formally employed— searching	1.8%	1.7%
Student	1.0%	0.4%

Figure S-1: Employment Status of Respondents

Not all employed migrants work for a Maine employer. Overall, 57% of employed migrants reported working for an employer with a physical location in Maine, while 43% reported working for an employer with no physical location in Maine. Of those working for an organization or business not located in Maine, 44% (24% of all employed migrants) reported they would consider working for a Maine-based business, organization, or government. In comparison, the remaining 56% (33% of all employed migrants) said they would not consider it. The most commonly cited reasons were liking their current job, the lack of competitive pay for a position in Maine, and the lack of opportunities that match their skill set.

Fourteen percent of employed migrants reported being self-employed, with just over 30% having started their business or professional practice after moving to Maine (4% of employed migrants). Almost 70% of self-employed migrants (9.6% of all employed migrants) brought their business or practice to Maine from a previous location.

The ability to work remotely has been a key factor enabling a substantial share of migrants to move to Maine while keeping their jobs. Of the migrant population reporting as employed, nearly one-third (30%) reported *they always worked* remotely, while 11% reported working remotely most of the time. More than 80% of respondents who previously worked remotely indicated that working remotely enabled them to keep their jobs while moving to Maine. Most of these migrants work for an employer with no physical presence in Maine.

CONNECTIONS TO MAINE

Past connections to and experiences with the state are a defining characteristic of migrants (Figure S-2). Just 1% of all migrant households reported having *no previous connections or experience* with Maine. The majority (65%) of migrant households (either self or a partner or spouse) have vacationed in Maine in the past. Social connections were also highly relevant—43% of either self, partner, or spouse reported having family members in the state, while 39% reported having friends living in Maine. These shares were generally consistent across the state, with migrants in the Southern Maine and Beaches and Greater Portland region having a slightly greater share of social connections before their move. “Boomerangs” accounted for a large share of migrants. Twenty-five percent of migrants (self or partner or spouse) spent some or all of their childhood in Maine, while 14% attended college in the state.

Connection or Experience	Share Reporting
Vacationed (any recreation) in Maine	65%
Family members live in Maine	43%
Friends live in Maine	39%
Spent childhood in Maine (all or part of)	25%
Attended college or other schooling	14%
Born in Maine	13%
Attended summer camp in Maine	9%
No previous connection in Maine	1%

Figure S-2: Previous Experiences or Connections to Maine



WHAT INFLUENCES PEOPLE TO MOVE TO MAINE?

People move to Maine for various reasons, which have varying degrees of influence depending on migrant household characteristics and specific circumstances, geography, and stage of life. However, there is broad consensus around a number of influential factors driving decisions to move to the state. Figure S-3 reports a weighted ranking of factors influencing people's decisions to move to Maine.

For more than one-half of migrants, outdoor recreation amenities were reported as a strong influence on their decision to move to Maine, including 25% who indicated these amenities had an extremely strong influence. Social connections (proximity to family, friends, or network) ranked the second most important influence on a household's decision to move to Maine. One-quarter of respondents indicated social connections were an extremely strong influence, and another 25% indicated social connections were a moderate or a somewhat strong influence on their decision to move to Maine.

Other factors of influence include community safety—more than half (54%) reported at least a moderate influence on their decision to move to Maine—while approximately 45% of respondents reported that having a culture that

values equity, acceptance, and openness was at least a moderate influence on their decision to move to Maine. Two out of five (44%) respondents reported cost of living was at least a moderate influence.

Other factors were reported to be of extreme influence to a relatively larger share of respondents but of less importance overall (i.e., the factor had a higher share of respondents reporting five but a lower overall percentage of respondents reporting either 3, 4, or 5). These include employment opportunities, the ability to work remotely, and family circumstances. Factors such as political climate the respondent agrees with, cost of living, and cultural and entertainment amenities had more substantial influence overall but more moderate or somewhat strong influence as opposed to extremely strong.

The onset and increasing intensity of severe climate-related events have increased households' propensity to move. Maine is often cited as an attractive destination for climate migrants. Over 40% of migrants indicated climate-related issues had a moderate influence on their decision to move to Maine, with 22% reporting a somewhat strong to extremely strong influence.

Factor	5 - Extremely strong influence	4 - Somewhat strong influence	3 - Moderate influence
Outdoor recreation amenities	25%	26%	21%
Social connections (closer to family, friends, network)	24%	13%	13%
Ability to work remotely (self or partner)	16%	8%	8%
Employment opportunity (self or partner)	15%	6%	7%
Community safety	14%	19%	21%
Family circumstance (e.g., care for extended family)	13%	7%	7%
A culture of equality, acceptance, or openness	11%	15%	18%
Cost of living	7%	13%	24%
Pandemic (COVID-19) motivated	6%	6%	8%
Political climate I/we agree with	6%	14%	20%
Quality of local K-12 schools	4%	4%	5%
Cultural and entertainment amenities	4%	11%	19%
Attend educational schooling or training	3%	1%	2%
Veteran community, support, or other resources	1%	1%	2%
Social media posts	0%	1%	2%

Figure S-3: Factors Influencing Migrant Decisions to Move to Maine, Share by Reported Level

Background

Attracting population and workforce talent to Maine is a core goal of the state's 10-year economic development strategy. The goal aspires to add at least 75,000 people to Maine's workforce to mitigate the effects of an aging population, which, based on 2019 levels, is projected to leave a 65,000-person labor force deficit by 2030. Each year, more people retire and exit the labor force than there are people entering the labor force. Without attracting a working population from outside the state, these trends will continue to have negative economic consequences.

Net migration—the difference between the number of people who moved to Maine and those who moved out of Maine—has risen since the onset of the 2020 coronavirus pandemic, reaching more than 21,000 persons in 2021. Subsequent years have brought substantial levels of net in-migration to the state following years of net out-migration and unpredictability. Whether the past few years have marked a shift towards sustained positive net migration remains to be seen.

The state is actively working to stimulate and sustain the net in migration of workers and household. The analysis prepared in this report is part of a wider data and research effort called the Maine Migration Project (MMP). It is intended to support statewide workforce attraction and recruitment efforts of its employment community and supporting entities. The findings of this analysis should be considered in tandem with insights from other sources, including MMP reports on the workforce attraction and recruitment experiences of Maine's employment community and the experiences of other state and regional workforce attraction campaigns, in addition to other resources.



PREVIOUS RESEARCH ON MIGRATION PREFERENCES IN MAINE

Previous research and data on migrant characteristics and motivations for moving to Maine was conducted more than 40 years ago by Louis Ploch at the University of Maine.² Ploch used driver's license registration information to conduct a series of three in-depth surveys of new Maine residents between 1976 and 1984. His research explored respondents' motivations for moving to the state, settlement patterns, involvement in community life, and satisfaction with living in Maine. His findings in the 1980s suggest that in-migrants were primarily drawn to Maine's distinctive "quality of life" features, such as its environmental beauty, natural resources, and small-town communities. Additional factors included the desire to leave urban life, specifically its pollution and higher crime rates. These new residents largely settled in the more rural areas of the state. Over the course of Ploch's nine years of study, in-migrants were consistently young adults with high levels of education working in white-collar

professions. Roughly two-thirds of in-migrants relocated from other New England states.

While there have been a few studies on migration and in-migration to Maine over the past several decades, none have focused on motivations for moving to the state. A survey of movers by the Maine State Planning Office in 1998 included the demographic characteristics of 122 in-migrants from other states and the reasons behind their moves. However, the focus was on sprawl and understanding the types of neighborhoods movers were seeking.³ Findings were consistent with Ploch's assessment of the demographic characteristics of in-migrants, who tended to have higher levels of educational attainment and higher income levels than the Maine resident population. These studies largely rely on Ploch's findings when referring to respondents' motivations for moving to the state.

REPORT OVERVIEW

Similar to Ploch's research 40 years ago, this report is based on a survey of driver's license registrants. It was administered in the spring of 2024 and focused on the characteristics and motivations of people and households that have moved to Maine since 2019. As such, it covers the period just before, during, and after the COVID-19 pandemic—a period believed to be an inflection point for migration in the U.S. and Maine. Although the final sample sizes vary, the analysis does consider, to an extent, whether any differences in characteristics or preferences exist between the periods before and after the pandemic. In addition to fundamental individual and household demographic and economic and employment characteristics, the analysis evaluates the role of remote work arrangements, self-employment, previous connections to Maine, and the influence of a number of place-based factors on the decision to move to Maine.

This report focuses on people and households that have moved to Maine and established residency from another state or international origin. In this report, they are referred to as "migrants." The majority of migrants move to Maine from another U.S. state, while a relatively smaller share may move to Maine from an international domicile. Although the analysis does consider whether an individual immigrated to the United States and whether there are preferential differences for these groups, the analysis does not make a distinction. Furthermore, the analysis does not direct attention to more transient migrant populations that move to the state, such as for education (a university or boarding school) or seasonal employment (e.g., farming or tourism), which are more likely to be counted in Census population estimates.

Methods and Report Scope

SURVEY AND SAMPLING STRATEGY

The goal of this report is to inform workforce attraction strategy actions by providing an understanding of the motivations and characteristics of people who move to Maine. For the purposes of this report, the analysis is representative of people and households that move to Maine and *establish residency*, which demonstrates a commitment, to a varying degree, to residing and working (where applicable) in the state.

To best capture this group, this analysis focuses on individuals who obtained a Maine driver’s license using a reciprocal license from a non-Maine domicile (e.g., another U.S. state). The working assumption of this analysis is that people who obtain a driver’s license have *established residency* and are committing, or at least intending, to reside in Maine for an extended period of time. Maine requires new residents to obtain a Maine driver’s license within one month of establishing residence in the state.^{4,5} According to the Federal Highway Administration (FHA), 91% of Maine residents of legal driving age have a driver’s license.⁶ Data for this analysis is based on a comprehensive electronic survey of people who moved to the state between

2019 and 2023. Survey respondents were recruited from a list of more than 80,000 individuals who were issued a Maine driver’s license during this period using an existing (reciprocal) license from a non-Maine domicile, representing their previous location (“BMV data”).⁷ From the initial list, approximately 56,600 records (70%) included a completed email address which made up the final list.⁸ Survey collection was administered by Qualtrics Research Services for two and a half weeks in April and May of 2024. One response per household was requested. Obvious duplicate household responses were flagged and accounted for in the final sample. A total of 2,926 responses were received, of which 2,562 responses were used in the analysis after screening for completeness. The response rate for the final sample was approximately 4.5%.⁹

The final sample included a larger share of movers from more recent years (Figure 1).¹⁰ Just 6% of the sample included movers from 2019 or earlier.¹¹ Where permissible, the analysis compares differences in pandemic and post-pandemic subgroups to understand any changes

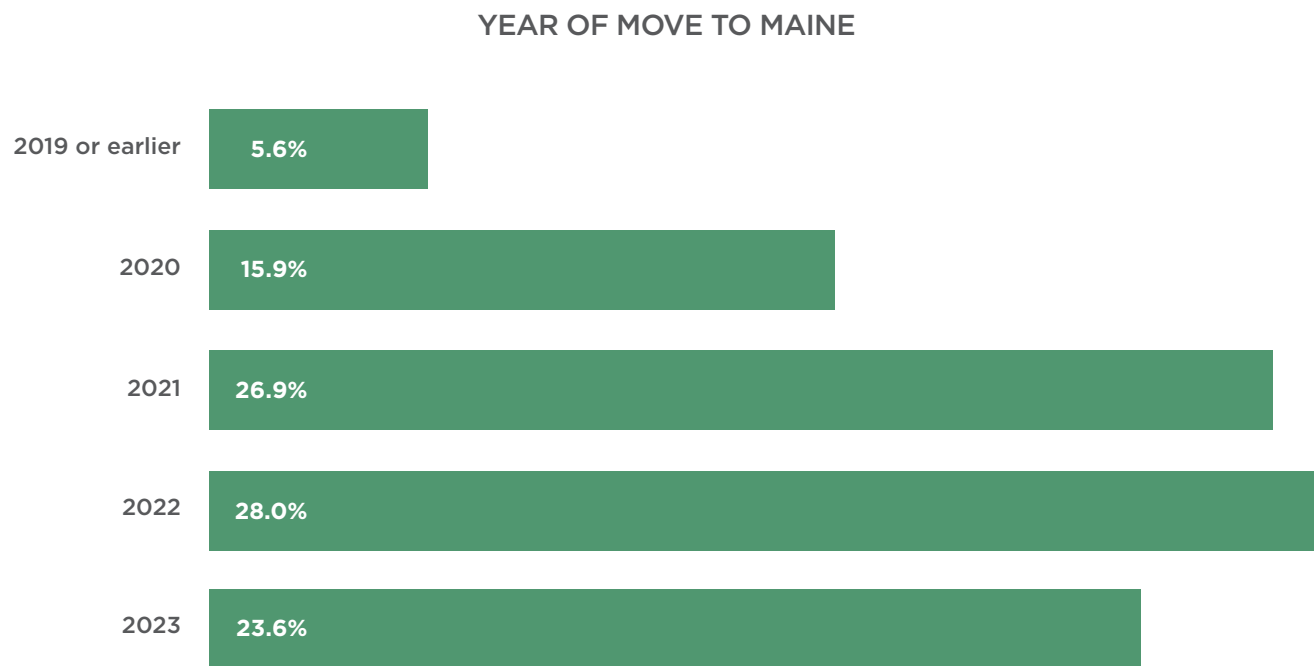


Figure 1: Year of Move to Maine Reported by Survey Respondents

in migration behaviors or reasons for moving that may have been impacted by the pandemic. This follows evidence that the pandemic impacted household decisions to move, though the underlying characteristics and motivations have remained relatively comparable.¹²

SAMPLE REPRESENTATION AND LIMITATIONS

The driver's license population and sample deviate from U.S. Census migration estimates from the American Community Survey (ACS) and the subset Public Use Microdata Sample (PUMS) shown in Figure 2 below (for individuals aged 20 or over). Census estimates capture all in-migrant population groups, including those that reside in group quarters (e.g., educational institutions) and other potential transient populations, such as seasonal workers.¹³ For example, this can be seen in the age distribution of migrants, which shows a larger share of in-migrants aged 20–24 and, to an extent, the 25–34 population cohorts. Although not all, most of these populations may leave upon completing their education at one of Maine's higher ed institutions or after completing a temporary employment engagement (traveling health care professionals, seasonal workers, contract workers, etc.). To be sure, these transient populations may be a core target for any workforce attraction and retention campaign implemented by the state or region. However, the motivations and characteristics driving a decision to move and reside in Maine are likely fundamentally different between transient groups, such as college students, and individuals and households that move to the state with the intention of establishing long-term residency in the state.

From this perspective, the BMV population likely does a better job of accounting for the populations of interest. Based on the coverage of the migrant population and sample size, it is our opinion that the data in this report provides a reasonable representation of the characteristics and preferences of recent in-migrants during the 2019–2023 period. This sampling method is also consistent with past studies of in-migration to Maine conducted by Ploch.

The BMV data and sample potentially undercounts younger aged cohorts (e.g., 25–34).^{14, 15} There could be a variety of factors that explain this. For instance, younger people may not obtain a driver's license because they

were not aware of state requirements, they may not have determined whether they plan to stay in Maine long term (establish permanent residency), or they may not have had a license in their previous location (they relied on public transportation in their previous location or obtained a license for the first time in Maine in which case they would not show up in the BMV data).

However, due to the imperfect nature of the BMV data and sample, we cannot be certain that the sample perfectly represents the migrant population of interest. Although we have tried to account for potential biases, the reader should consider several limitations when interpreting results. First, the survey does not necessarily capture direct international migrants or immigrants who did not obtain a Maine driver's license or who did not obtain a Maine driver's license with a reciprocal license from a non-Maine domicile. Second, of the more than 80,000 registrant records, more than 30% did not have a valid email address and did not receive an invitation to take the survey. Third, the survey allowed for self-selection, which can present bias in results where respondents differ from nonrespondents, which may impact the results' generalizability. Likewise, the BMV dataset population itself possibly under or over-represents certain population groups which may bias results. For example, the BMV dataset likely over-represents older-aged cohorts (aged 65 and over) and under-represents younger cohorts (aged 25–34)—see Figure 2—which is reflected in the final sample. This may have impacts on employment and labor force participation estimates for instance—employment shares may be undercounted if retirees make up a disproportionate share of responses.¹⁶ Lastly, the electronic nature of the survey provides convenience for people who typically work at a computer, work remotely, have ready access to a computer and internet, and have more time available to respond.

Despite these concerns, we believe the estimates presented in this report provide a reasoned and consistent representation of the migrant population of interest and a wide array of data points critical to developing workforce attraction strategies and actions. However, the reader should consider these limitations and data characteristics when interpreting the results and information in this report.

EVALUATING DIFFERENCES IN PREFERENCES ACROSS AGE COHORTS AND GEOGRAPHY

Individual and household location and migration decisions are generally understood to be based on an individual or household's economic, social, housing, and amenity preference, which may change depending on an individual or household's life cycle stage, family composition, occupational skill set, or other characteristics and needs. Where relevant, the analysis also considers differences with respect to remote work arrangements, self-employment, or specific factors that may be more relevant to migrants with specific characteristics, such as the influence of local school quality on migrant households with children.

LIFE CYCLE STAGE AND AGE COHORTS

Responses are evaluated across age cohorts that represent different life cycle stages. Younger-aged cohorts (20–34) are generally viewed as individuals in early adulthood. The youngest in this cohort may be in school or early career and may begin establishing families or becoming parents. Individuals aged 35–64 are generally considered in middle adulthood and are more likely to have established families, be parents, or have established careers. Individuals aged 65 and over are considered in the late adult life cycle stage in which they are more likely to be retired and empty nesters with more flexibility in their location decisions. Life cycle stages are fluid, and individuals may bridge stages irrespective of chronological age. However, the life cycle stage provides a useful framework to consider the preferences of groups of migrants.

More than one-third of sample respondents reported as 65 years or older, and a total of 56% of respondents were 55 years or older (Figure 2).¹⁷ Just one percent of respondents were between 20 and 24 years old.¹⁸ Compared to recent Census PUMS estimates, older cohorts represent a disproportionately more significant sample share, while younger cohorts were underrepresented—as discussed in Section 2.1. However, the sample reflects the population of driver's license registrants from which the sample was taken. This is accounted for by testing for differences across age cohorts and reporting age cohort breakouts where a significant difference across life cycle stage is identified.

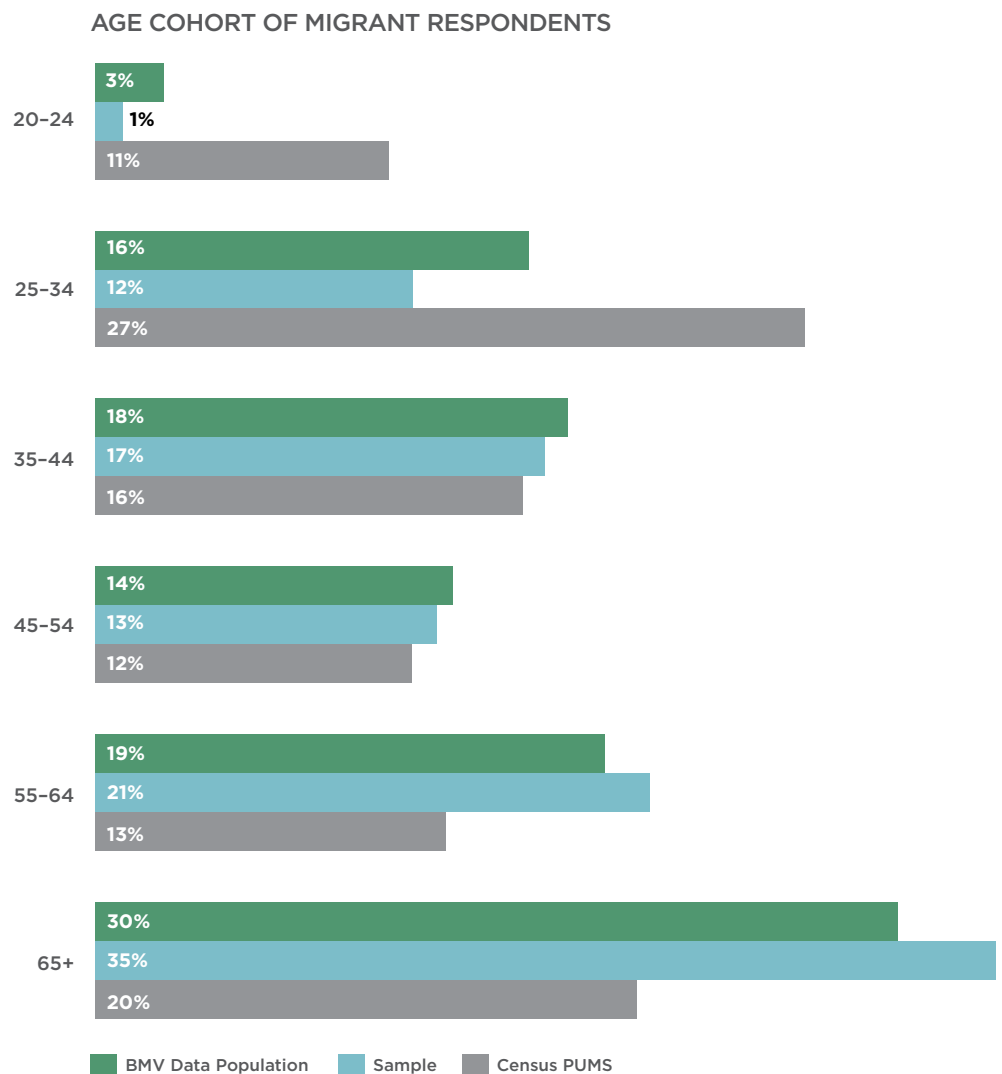


Figure 2: Age Cohort of Migrant Respondents (Self only, no other household)

GEOGRAPHICAL DIFFERENCES IN AMENITIES

Regional differences are important because they reflect local amenity assets, ranging from natural resources to place-based social or community assets. Maine has a rich diversity of place-based assets reflected in distinct tourism regions of the state. The tourism regions (Figure 3) are defined by distinct natural amenities, such as mountains, inland waterways, coastline, beaches, and ocean access, as well as more urban and cultural amenities, such as the Greater Portland and Casco Bay region.¹⁹

Figure 4 displays the distribution of in-migrant destination regions (Migrant Population Share)—based on the original list of driver's license registrants—and migrant responses (Survey Sample Share) by region. Many migrants are located in the state's southern portion, including Greater Portland (28%) and the Southern Maine and Beaches regions (21%). Aroostook County, the northernmost region in Maine, had the smallest share of responses from migrants (4%), while Downeast and Acadia received only slightly more (5%). Compared to the existing population, the Southern Maine and Beaches and Greater Portland regions had a higher rate of in-migrants than other regions in the state. In contrast, the Lakes and Mountains, Kennebec Valley, and Downeast and Acadia regions had relatively lower rates of in-migration based on driver's license registrations for the period.

Overall, the sample for each region was relatively consistent in magnitude to the migrant population share, with a few minor variations (Figure 4). Migrants in Downeast and Acadia, the Lakes and Mountains, and Midcoast regions were slightly oversampled (approximately 4% in each case), while Greater Portland and Casco Bay and the Kennebec Valley were under-sampled (by 4–5%). However, no one region received a disproportionately larger or smaller share of responses compared to the population of migrants.

Figure 5 shows the regional distribution of migrant respondents by age ranked by the 65+ age cohort. Migrants to the Midcoast region comprised older individuals/households—46% were aged 65 and older, and over two-thirds (68%) were aged 55 years or older. Downeast and Acadia (66%) and the Southern Maine / Beaches (63%) similarly had a larger share of migrants in the age cohorts 55 and older. Migrants to the Highlands region, which includes the Bangor metropolitan area, and the Greater Portland and Casco Bay region skewed younger, with both regions having 38% of migrants aged 20–44.

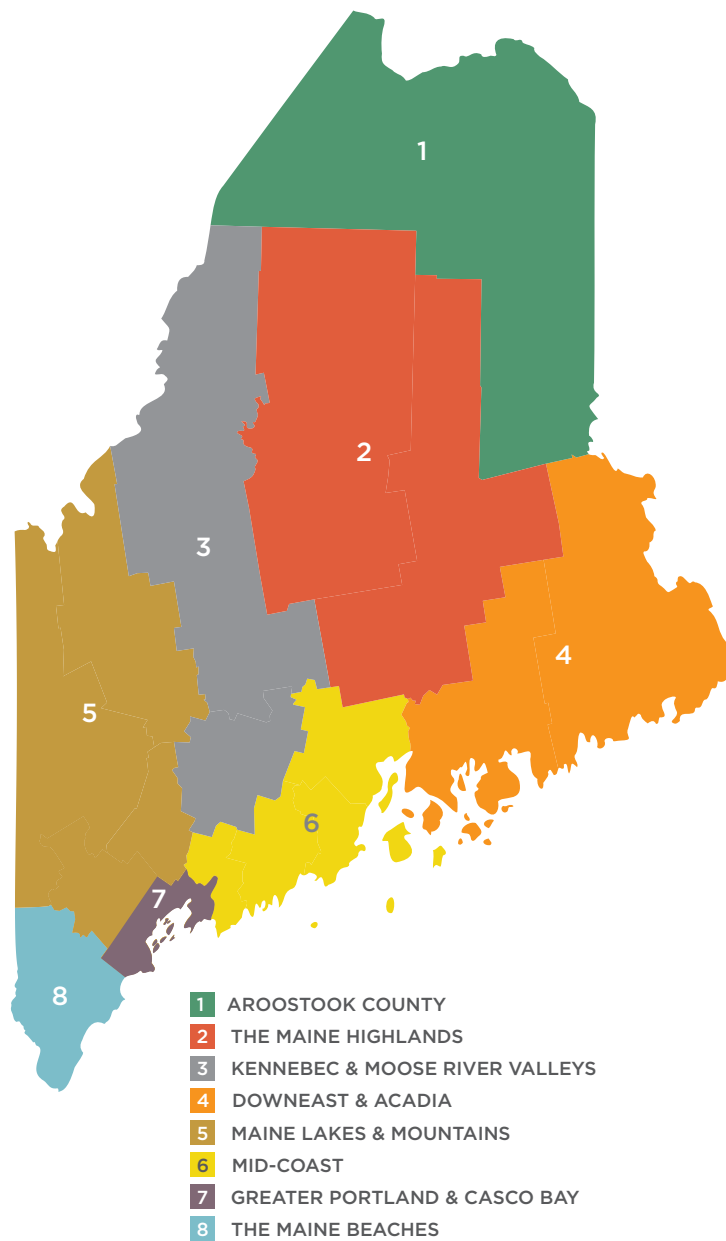


Figure 3: Maine Tourism Regions

	Migrant Population Share	Survey Sample Share	Population (2023)
Aroostook County	4%	4%	5%
Downeast & Acadia	5%	9%	6%
Greater Portland & Casco Bay	28%	23%	22%
Kennebec & Moose River Valleys	9%	5%	13%
Maine Lakes & Mountains	10%	14%	15%
Mid-coast	12%	16%	11%
The Maine Beaches	21%	19%	16%
The Maine Highlands	10%	11%	12%

Figure 4: Regional Distribution of Migrant License Registrations and Survey Respondents²⁰

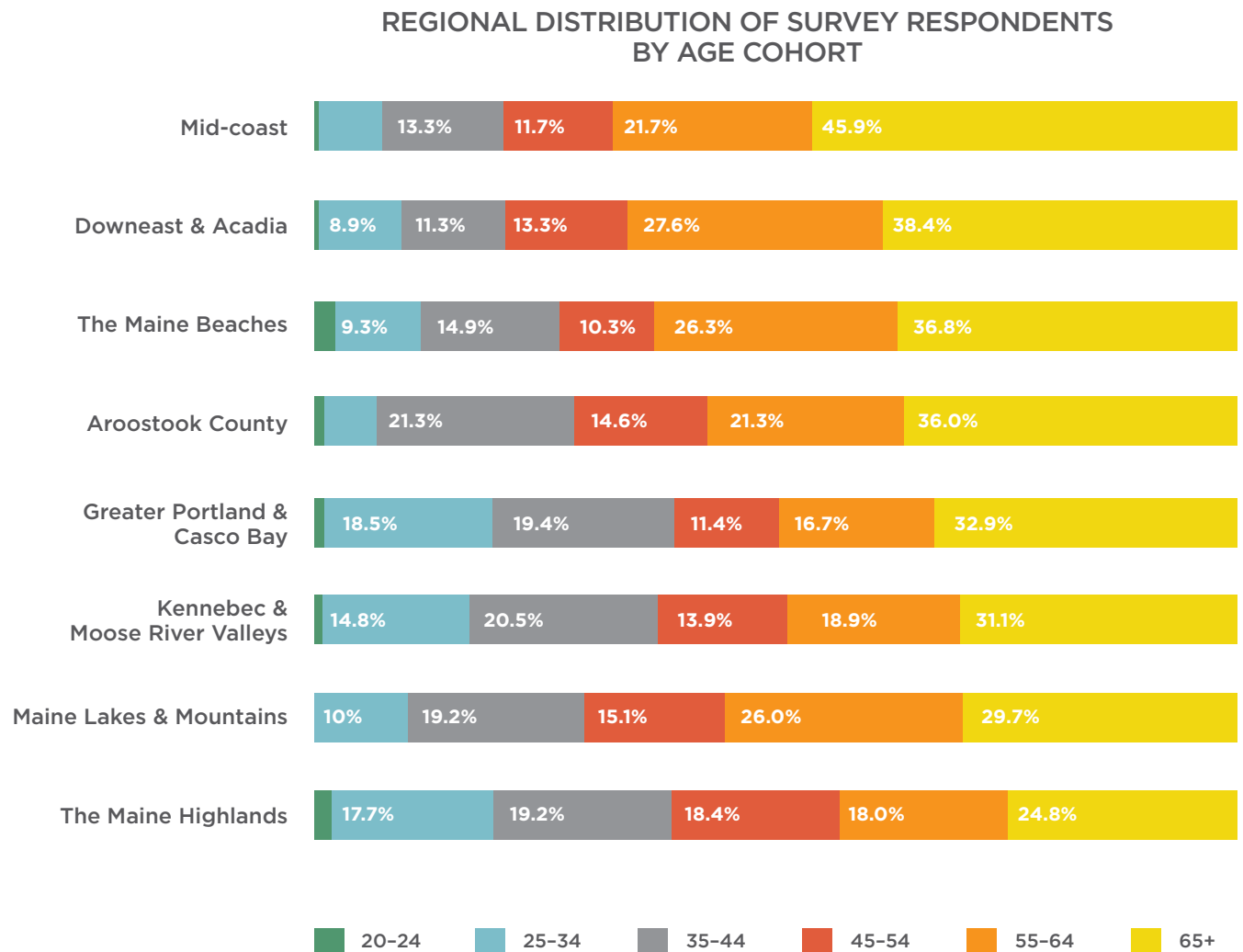


Figure 5: Regional Distribution of Survey Respondents by Age Cohort

Demographic and Household Characteristics

ORIGIN OF MIGRANTS

Migrants were asked to provide the state where they lived—the Origin—before their move to Maine (Figure 6).²¹ Northeastern states were the origin for a significant share of respondents (40%). Massachusetts (19.1%), New Hampshire (8.1%), New York (6.8%), and Connecticut (4.5%) were the largest contributors of Northeastern states. The large population states of California (6.2%) and Florida (5.2%) were also reported as the origin of move for more than 11% of respondents. Mid-Atlantic states, including Pennsylvania (3.6%), Virginia (3.6%), and New Jersey (3.2%), were the origin of move for just over 10% of migrants, while the western and south-central states of Texas (3.7%), Colorado (2.7%), Washington (2.1%), and Arizona (2.0%) were the origin of move for more than 10% of respondents.

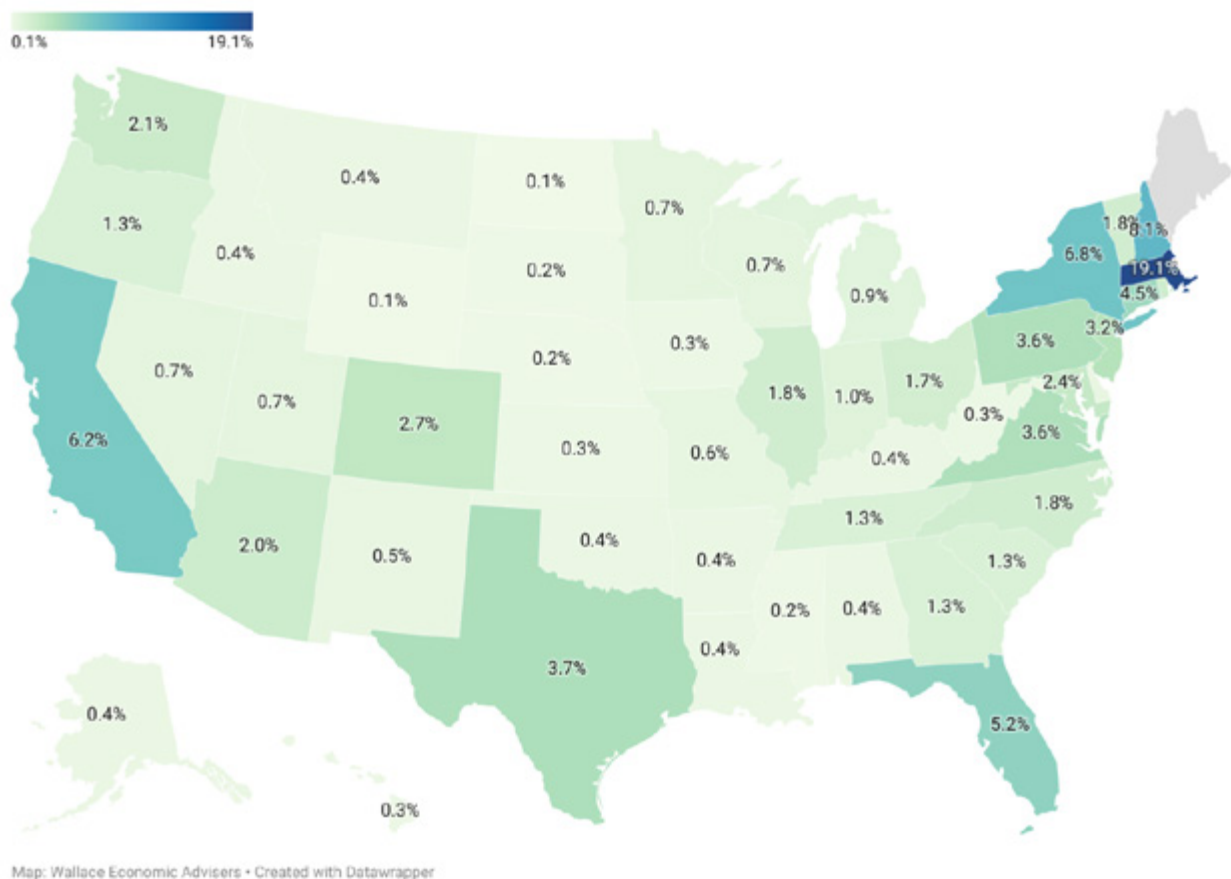


Figure 6: Where Survey Respondents Moved From

RACE AND ETHNICITY, IMMIGRATION, AND VETERAN STATUS



RACE AND ETHNICITY

Maine is among the least racially diverse states in the country. Recent migrants reflect similar patterns. Ninety-two percent (92%) of respondents identified as White, while 5% did not identify a race or ethnicity, and one percent identified as Black or African American.²² Three percent of respondents identified as Hispanic or Latino.

IMMIGRATION AND YEAR OF IMMIGRATION

Survey respondents were also asked whether they have ever immigrated to the United States and, if so, the year of immigration.²³ Five percent of respondents reported having immigrated to the United States at some point in time. The vast majority of immigrants reported coming to the U.S. (70% of immigrants, 3.5% of the total sample) before 2014 and 30% (1.5% of the total sample) since

2014. It is important to note this may not represent the actual share of movers to Maine who are immigrants, especially in recent years. The nature of the sample likely excludes immigrant populations that may have directly moved to Maine or immigrant populations that could not use a reciprocal license to obtain a Maine driver's license.

VETERAN STATUS

Maine is home to a larger share of veterans than other U.S. states. Organizations such as Boots2Roots are actively supporting military service to civilian transitions, bringing veterans and people with military experience to the state. Twelve percent of survey respondents (migrants) identified as veterans, though just 8% of those identified their move to Maine as part of a civilian transition (about 1% of the full sample).²⁴

HOUSEHOLD CHARACTERISTICS



HOUSEHOLD COMPOSITION

Respondents were asked whether they moved to Maine by themselves, with a partner or spouse, or with other family members or friends (household composition).²⁵ Figure 7 shows household composition by age cohort. Overall, two-thirds (66%) of migrants moved with a partner or spouse, 26% reported moving to the state alone, and 8% reported moving with friends or other family members. As might be anticipated across age cohorts, younger-aged migrants were more likely to move alone (57%) or with friends or family members (25%) rather than moving with a partner or spouse (18%). For migrants aged 25–34,

a larger share (54%) moved with a partner or spouse, and 38% moved alone. Migrants 35 and over were much more likely to move with a partner or spouse.

Household composition was largely similar across regions (Figure 8). A greater share of migrants moved to Maine alone in the Greater Portland, Lakes and Mountains, and Downeast and Acadia regions. A relatively higher share of migrants moved with a partner or spouse to the Southern Maine and Beaches region (72%). Migrants in Aroostook County were more likely to move with friends or family members (15%) than in other regions.

HOUSEHOLD COMPOSITION OF MIGRANTS BY AGE

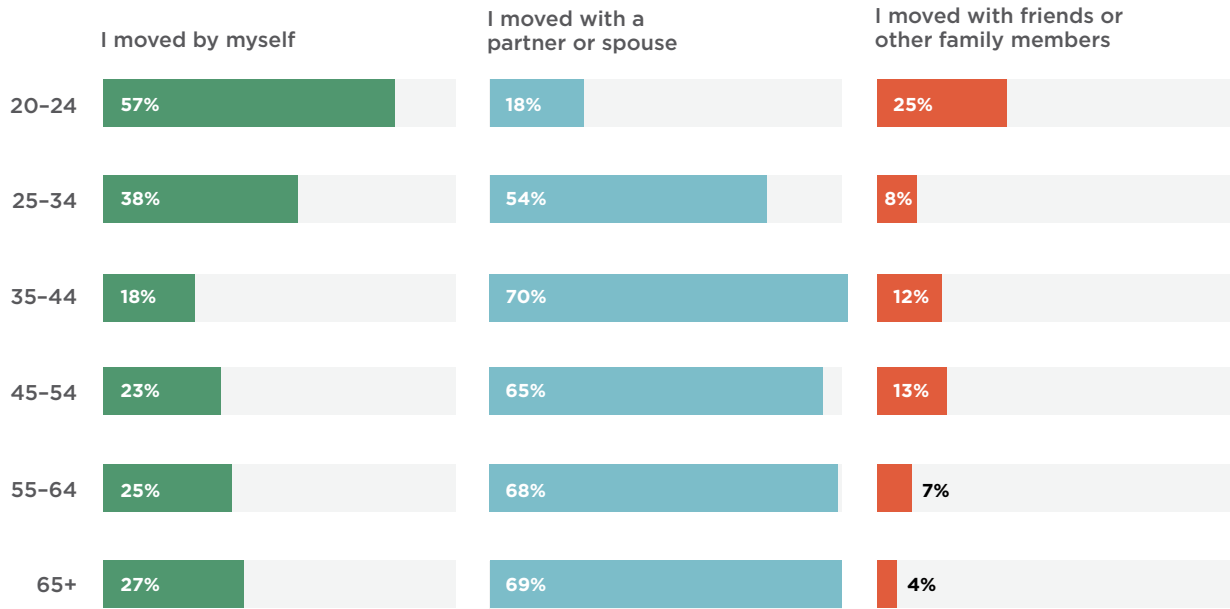


Figure 7: Household Composition of Migrants by Age Cohort

HOUSEHOLD COMPOSITION OF MIGRANTS BY REGION

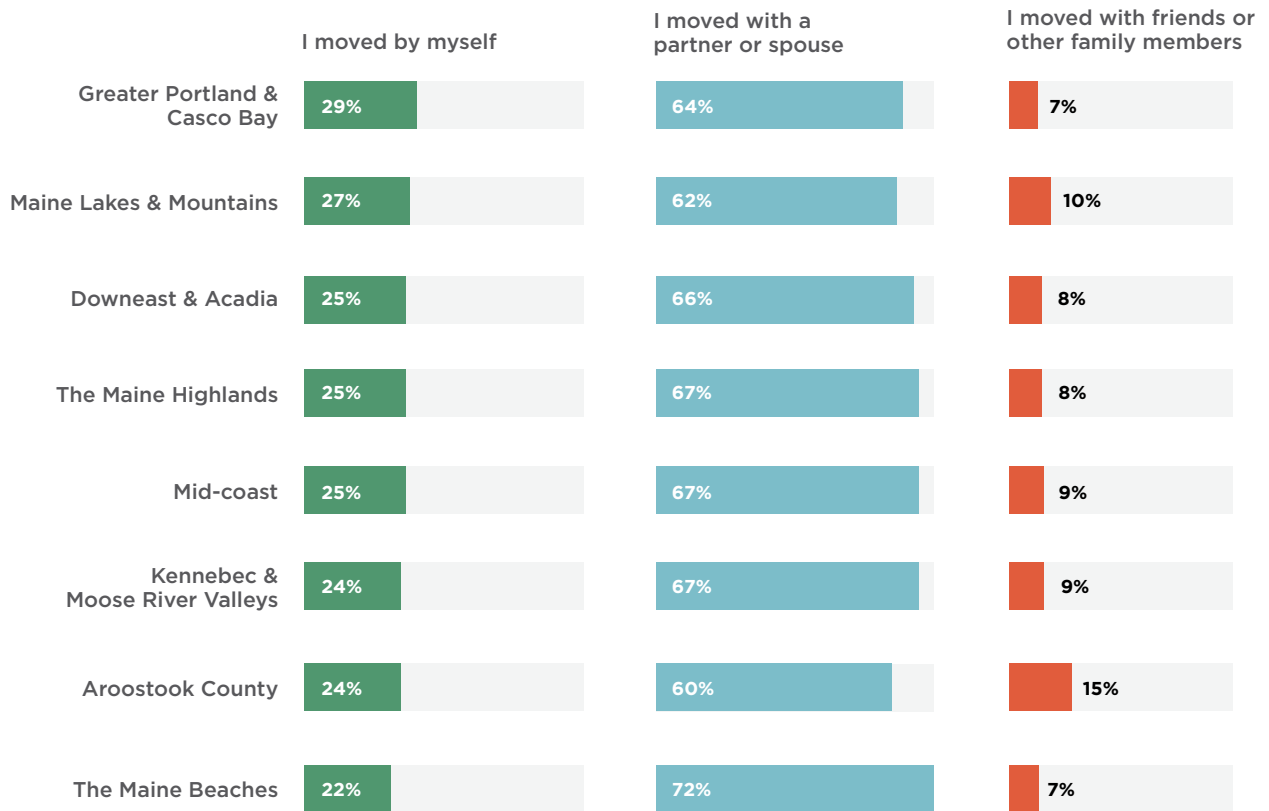


Figure 8: Household Composition of Migrants by Region

MIGRANTS WITH CHILDREN UNDER 18

Overall, respondents were more likely to move without school-aged children (84%).²⁶ Just over 16% of respondents reported moving to Maine with their own children aged 18 or younger (at least one child). Approximately 7% indicated one child, 6.7% indicated two children, and 2.6% indicated three or more. This is consistent with Census data and prior research finding that families with children are less likely to make long-distance moves.

HOUSING ARRANGEMENT OF MIGRANTS

Respondents were more likely to own their current home than rent or hold other housing arrangements.²⁷ Three-quarters of respondents reported owning their current home, while 20% reported renting (Figure 10). Based on Census data, this is consistent with ownership rates for all residents (74%). One and a half percent reported they lived with a family member, and just under 1% reported living in temporary housing. Among the 2% of responses indicating “Other,” respondents reported various alternative housing arrangements, including housing provided by education or employer or living in retirement assisted living.

Age patterns of housing follow general population trends (Figure 11). Older-age individuals are more likely to own their homes compared to younger cohorts, who are more likely to rent or have alternative housing arrangements, such as living with family members or living in temporary housing.

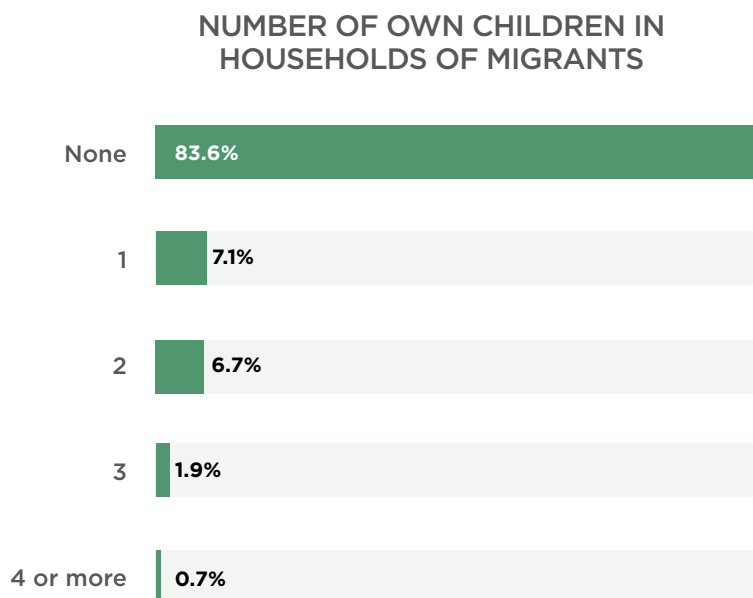


Figure 9: Number of Own Children in Households of Migrants

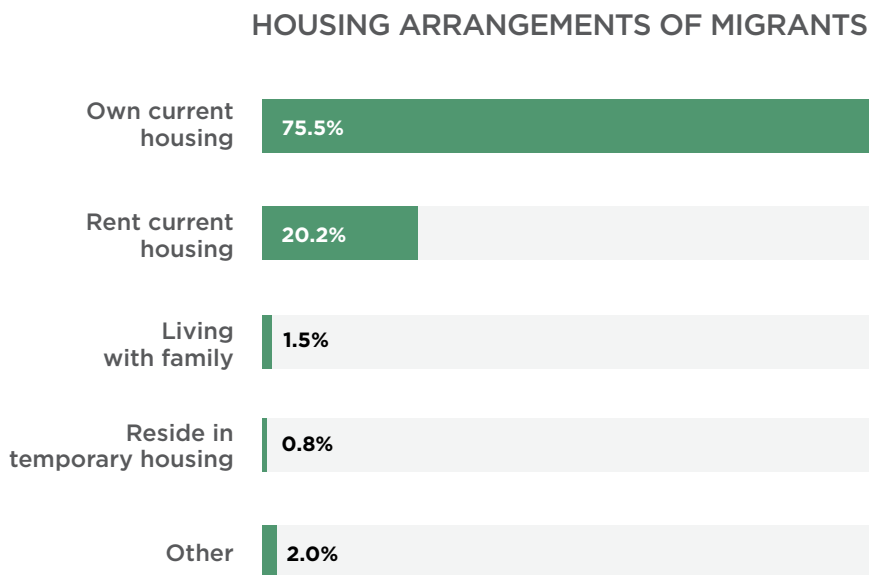


Figure 10: Housing Arrangements of Migrants

HOUSING ARRANGEMENTS OF MIGRANTS BY AGE

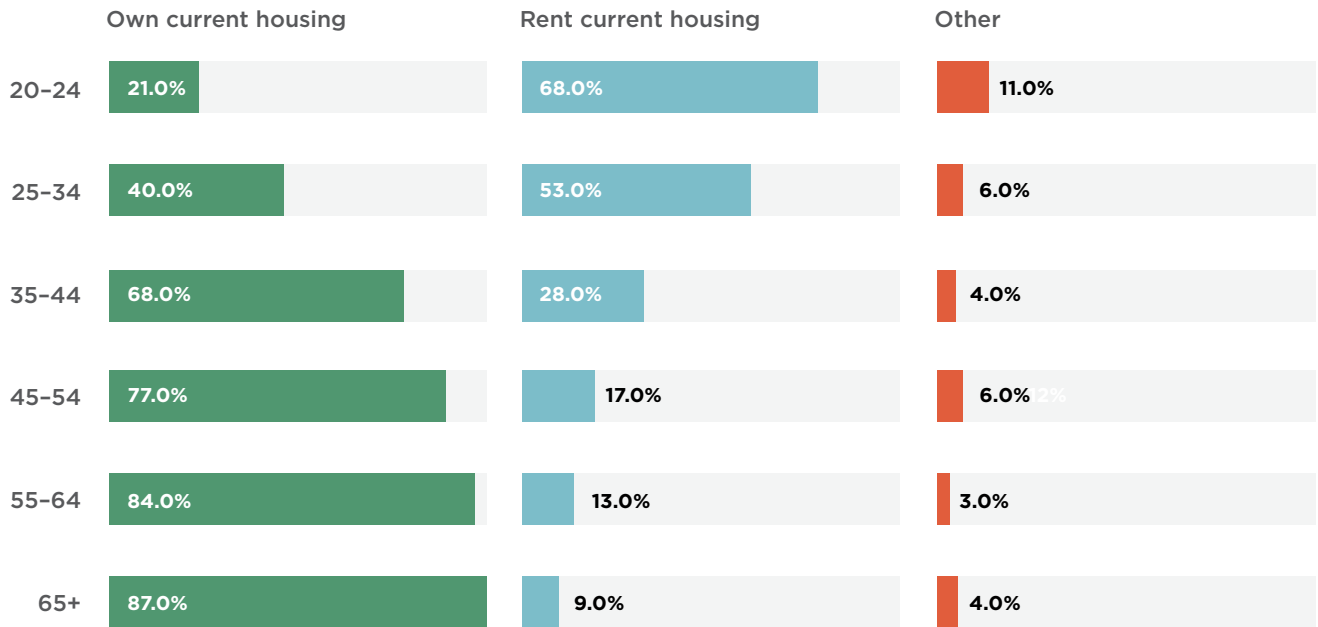


Figure 11: Housing Arrangements of Migrants by Age

HOUSEHOLD INCOME

Household income of migrants is well above real median household income levels for the existing population (\$75,160)²⁸ with more than 50% reporting household incomes of at least \$100,000 per year and 32% of migrants reporting a household income of \$150,000 or more (Figure 12).²⁹

Household income patterns of migrants vary across regions, with higher-income households locating in the Greater Portland and Casco Bay, Downeast and Acadia, Midcoast, and Southern Maine and Beaches regions (Figure 13). More than 60% of migrant households in Greater Portland had household incomes greater than \$100,000, with 40% reporting more than \$150,000.

MIGRANT HOUSEHOLD INCOME

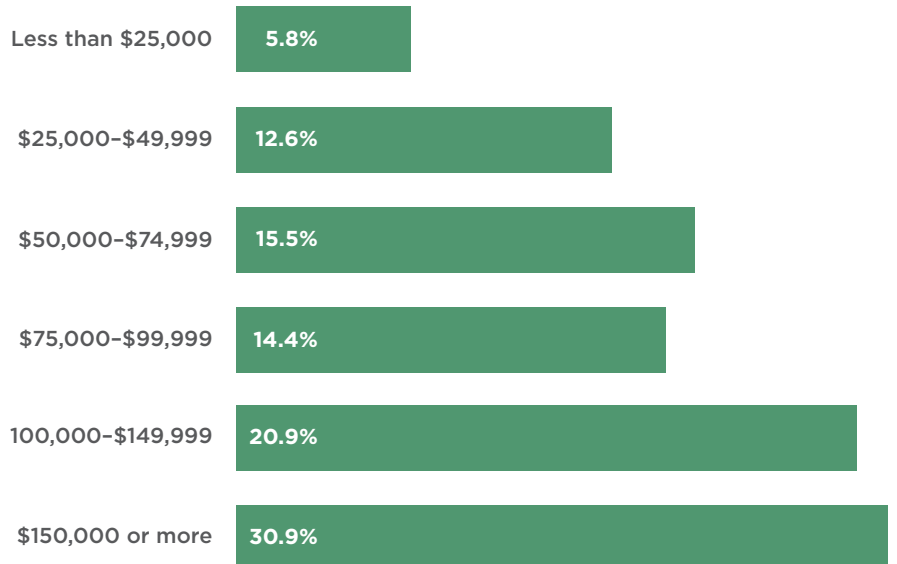


Figure 12: Migrant Household Income

MIGRANT HOUSEHOLD INCOME BY REGION

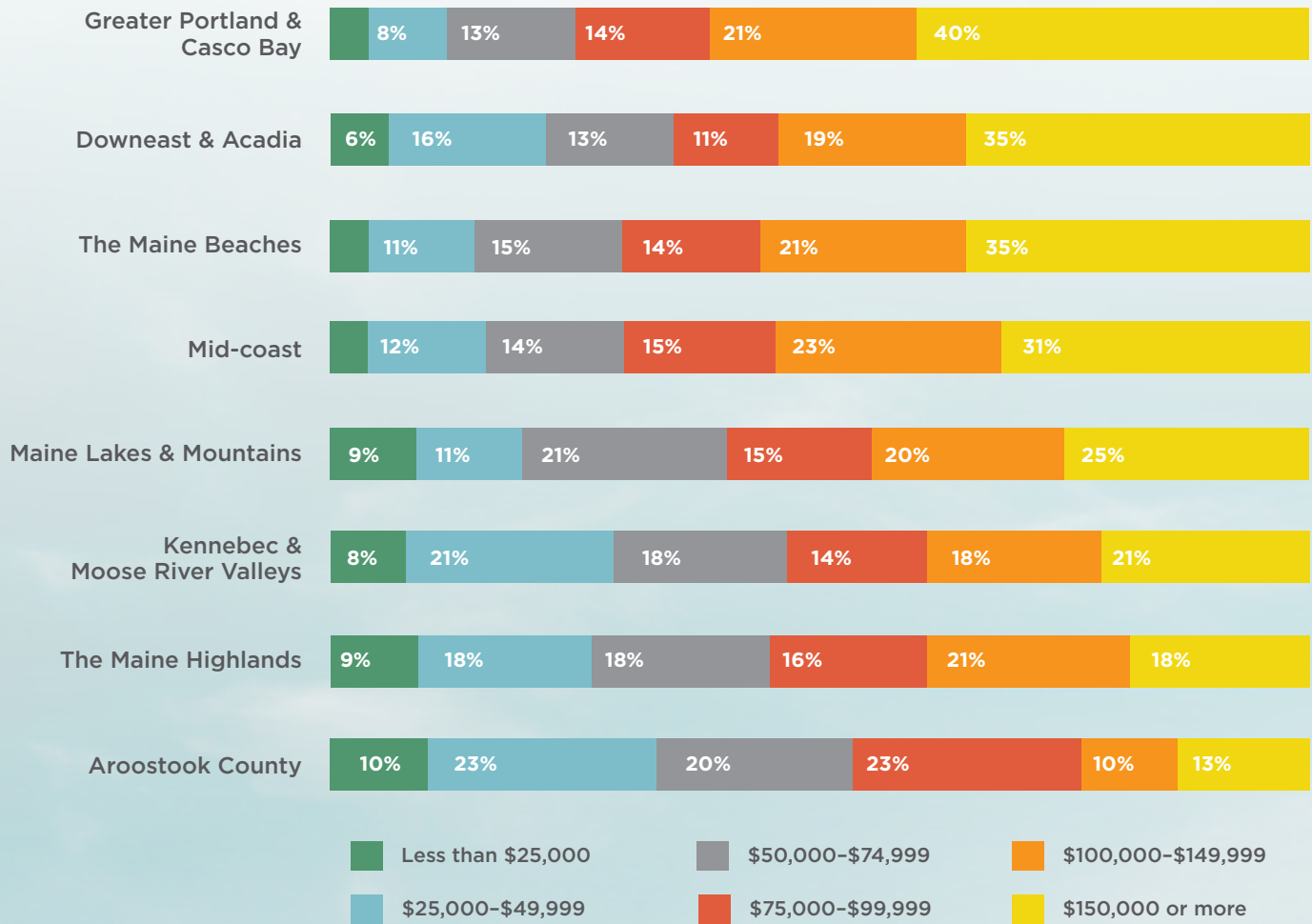


Figure 13: Migrant Household Income by Region

COMMUNITY ENGAGEMENT

Migrants were asked how they are engaged with their community through volunteering, charitable contributions, or other activities.³⁰ Although there is no benchmark to compare directly to the general population, responses help gauge *social capital* and the extent to which new residents contribute and engage with their local communities.

Migrants are highly likely to have one or more community engagement activities in the local community, whether service or financial contribution. Sixty-two percent reported engaging in charitable contributions to in-state organizations, causes, or institutions. Sixty-one percent (60.7%) reported volunteering or serving a not-for-profit organization, 34% reported volunteering or serving a civic or public organization, and 10% reported volunteering or serving a for-profit or business community supporting organization (Figure 14). Nineteen percent reported other community engagement activities. Of the total sample, just 1% of migrants reported no community engagement activities at this time.



COMMUNITY ENGAGEMENT

Charitable contributions to in-state organizations, causes, or institutions



Volunteer/serve a not-for-profit organization (including religious, board, events, etc.)



Volunteer/serve a civic or public organization (school, neighborhood, government, youth activities, etc.)



Other community engagement activities



Volunteer/serve for profit or business community supporting organization (advisory, board, investment, industry group, etc.)



None at this time



Figure 14: Community Engagement Activities of Migrants

Economic and Employment Characteristics

As mentioned earlier in this report, one of the primary goals of the state's 10-year economic development strategy is to attract 75,000 new workers. Although net migration has risen over the last few years, peaking in 2021 with more than 21,000 net migrants, this does not equate to employed persons or persons looking for work. Counts or estimates of net migration are cumulative of all persons, including retired, non-working aged youth, and persons not in the labor force. This section estimates the share of respondents in the labor force and their characteristics.

EMPLOYMENT STATUS

Figure 15 shows the distribution of employment status for both the respondent and a partner or spouse, where relevant.³¹ Virtually all migrants *in the labor force* are employed, with just a small percentage (2%) of respondents reporting being unemployed and searching for work—a percentage similarly reported for a partner or spouse—estimates slightly below the state’s current unemployment rate (2.8%).³²

Overall, 35% of respondents identified as retired, reflecting the age distribution of migrants, while 38% identified a spouse or partner as retired, where applicable. Forty-six percent of respondents (46%) reported working full-time, and 9.3% reported working part-time. Respondents reported a partner or spouse was working full-time 44% of the time and part-time 9.2% of the time. Two percent (1.9%) reported being a caregiver or parent, while 2.4% reported that occupation for a partner or spouse. Overall, this indicates a labor force participation rate of 58.2%, consistent with the state’s current rate of 59.6%.^{33, 34}

Some caution is warranted when generalizing these estimates to the actual migrant population. As discussed in Section 2 of this report, the population from which the sample represents (BMV data) may undercount younger populations and overcount older populations. If this is the case, the implications would be that the actual share of employed migrants *may actually be higher* while the share of retired migrants may be lower than those represented in Figure 15. Table 1 illustrates why this may be the case. Just 20% of migrants aged 65 and over reported being employed (either full-time or part-time)—a group overrepresented in the sample. Assuming this is the case, the migrant population has higher employment and labor force participation rates than the general population. The employment characteristics in the rest of this section are likely less impacted by age distributions than overall employment status.

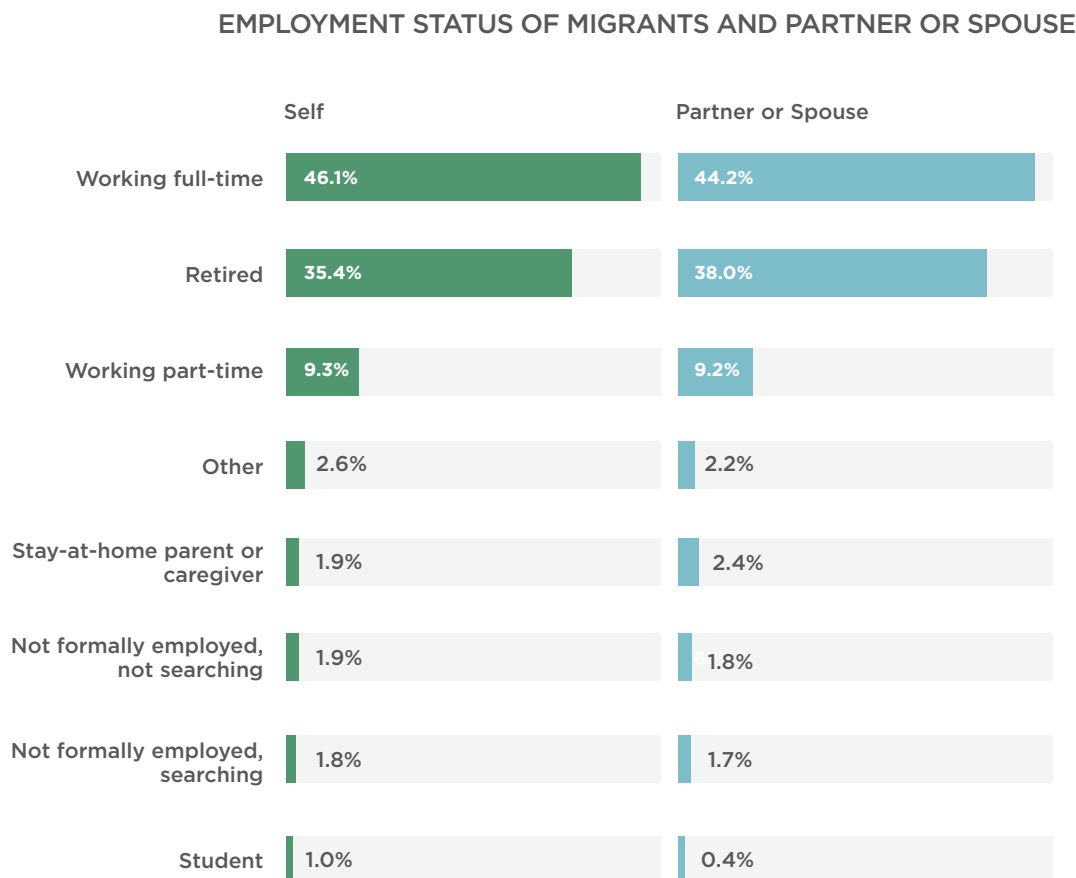


Figure 15: Employment Status of Migrants and Partner or Spouse

EMPLOYMENT STATUS BY AGE COHORT

Employment Status	20-24	25-34	35-44	45-54	55-64	65+
Working full-time	69%	82%	74%	68%	43%	11%
Retired	0%	0%	2%	7%	34%	77%
Working part-time	3%	6%	9%	10%	12%	9%
Other	0%	2%	3%	5%	3%	2%
Not formally employed, not searching	0%	1%	2%	4%	5%	2%
Stay-at-home parent or caregiver	3%	5%	7%	4%	1%	0%
Not formally employed, searching	3%	2%	3%	3%	2%	0%
Student	22%	3%	1%	0%	0%	0%



CLASS OF WORKER

Class of worker refers to whether an individual is employed by an organization (for-profit, non-profit, or government) or is self-employed, including independent contractors. Respondents were asked to classify for self and a partner or spouse, when applicable.³⁶ Only respondents previously reporting as employed were asked to identify whether they are an employee or self-employed. A majority of employed individuals and their partners or spouses reported employment with a for-profit or non-profit company or organization—70% of self and 69% of partners or spouses (Figure 16). Almost 14% reported being self-employed, split between non-incorporated business or professional practice (7.2%) and incorporated business or professional practice (6.5%).

EDUCATIONAL ATTAINMENT

Educational attainment is often used as an approximation for occupational skill level. Individuals and households with higher levels of education are also more likely to move over longer distances. Respondents reported educational attainment levels above that of the general Maine population.³⁷ Approximately three-quarters of respondents (both Self and Spouse) reported holding at least a Bachelor's degree or higher - double the share (37%) of the statewide population (Figure 17). More than one-third of migrants or a partner or spouse held a Master's or Professional or Doctorate Degree. Nearly 84% of all respondents reported some level of post-secondary education (beyond a high school degree or equivalent). These shares were consistent across age groups with the exception of the 20–24 age cohorts, which have a higher share of in-school population.

MIGRANT CLASS OF WORKER FOR SELF AND PARTNER OR SPOUSE

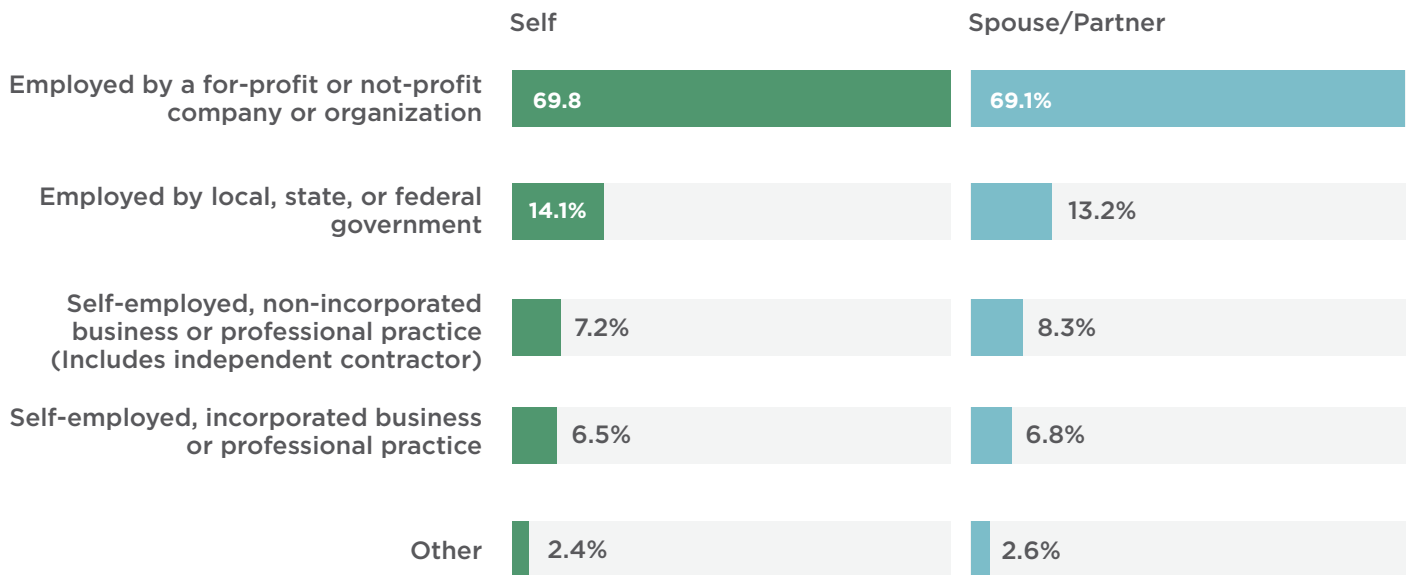


Figure 16: Migrant Class of Worker for Self and Partner or Spouse

MIGRANT EDUCATIONAL ATTAINMENT, SELF AND SPOUSE/PARTNER

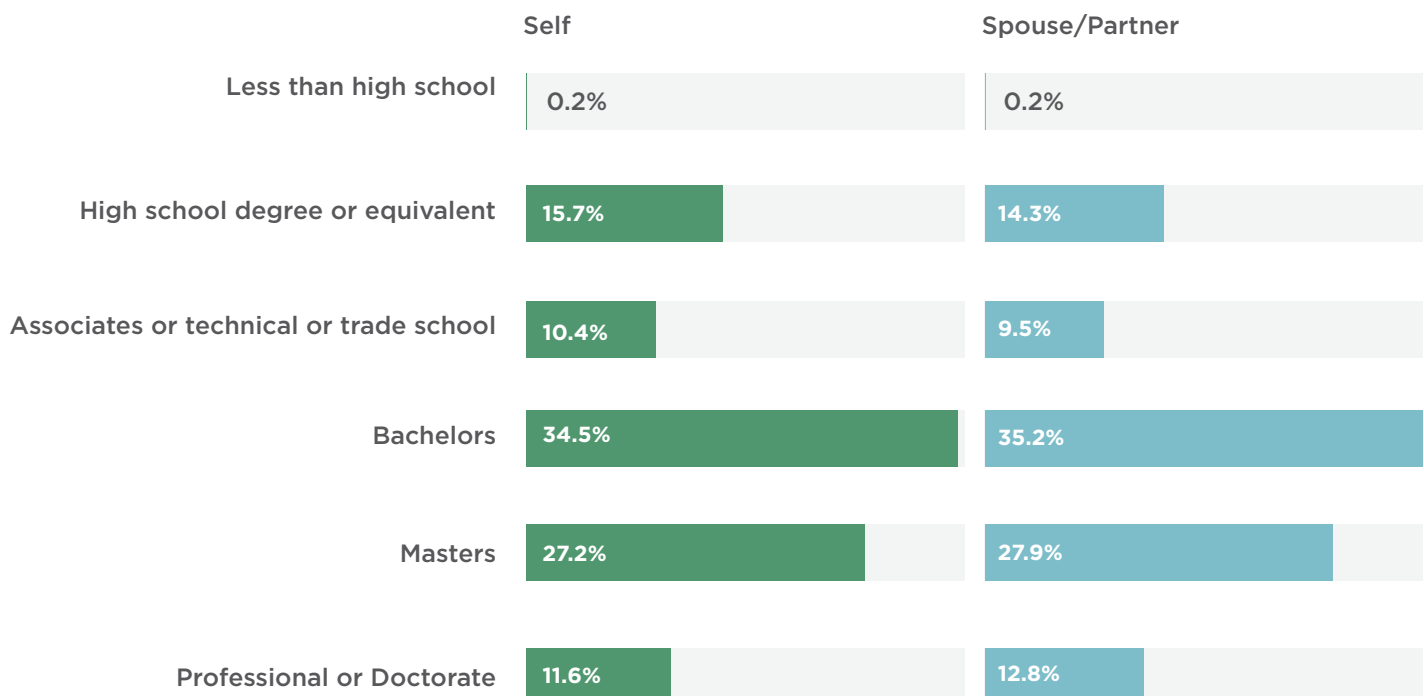


Figure 17: Migrant Educational Attainment, Self and Spouse / Partner



OCCUPATIONAL CATEGORY

The composition of occupations aligns with a number of other characteristics of migrants, including income levels, education, and the ability to work remotely (see Section 4.4). Figure 18 displays the major occupational category reported by employed migrants and their partner or spouse.^{38,39} The most common categories reported for Self were Business and Financial Operations (17%) followed by Management (13%), Healthcare Practitioners and Technical (12%), and Educational Instructional and Library (11%). Migrants in jobs related to construction, transportation, installation, production (manufacturing), and maintenance made up about 8%,

while personal care and service jobs, food preparation and serving, healthcare support, and natural resource-based jobs comprised about 4% of migrant jobs.

The occupations reported for a Partner or Spouse followed a similar distribution, with the majority of migrants in occupations related to business and financial operations (14%), healthcare practitioners and technical (12%), educational instruction (12%), and management (11%). Jobs in arts, design, entertainment, sports, and media (8%) comprised a slightly larger share of partner or spouse occupations.

OCCUPATION OF EMPLOYED MIGRANTS AND PARTNER OR SPOUSE

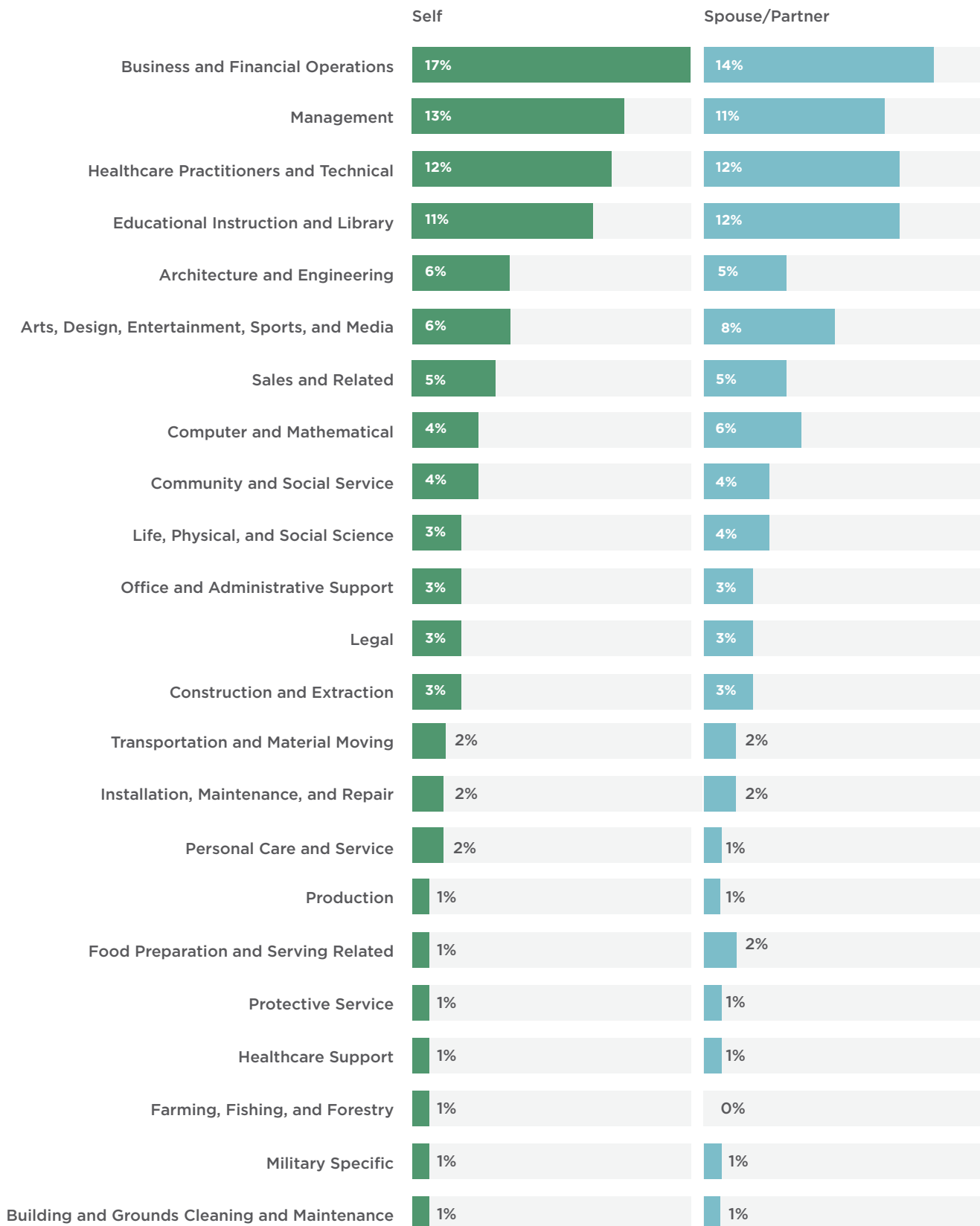


Figure 18: Occupation of Employed Migrants and Partner or Spouse

SELF-EMPLOYMENT

AGE OF SELF-EMPLOYMENT

Fourteen percent of employed persons reported self-employment. Figure 19 shows the age distribution of respondents reporting self-employment, inclusive of non-incorporated or incorporated self-employed.⁴⁰ Generally, self-employed persons are older—more than 50% were 55 years or above. Just 7% of self-employed migrants were 34 or younger.

LOCATION OF BUSINESS START AND CURRENT OPERATION

Of self-employed persons, just over 30% started their business or professional practice after moving to Maine (4% of employed persons), while almost 70% (9.6% of employed persons) continued their practice from a previous location.

The majority of self-employed individuals reported working from home (73%), while 23% reported working in a non-residential business location, and 4% worked from a coworking or shared office space (Figure 20).⁴¹

MOTIVATIONS FOR STARTING A BUSINESS IN MAINE

The stated motivations for starting a self-employed business or professional practice in Maine are diverse, though responses were limited to a small sample, and caution should be taken when interpreting the results (Figure 21).^{42,43} Greater flexibility in work-life balance (24%) was respondents' most commonly cited motivation. Being [their] own boss (12%), business opportunity in Maine (12%), and best avenue for [their] ideas, goods, or services (12%) followed. Maine's business and start-up resources were not a primary motivator for a small number of respondents (3.4%).

SELF-EMPLOYMENT BY AGE

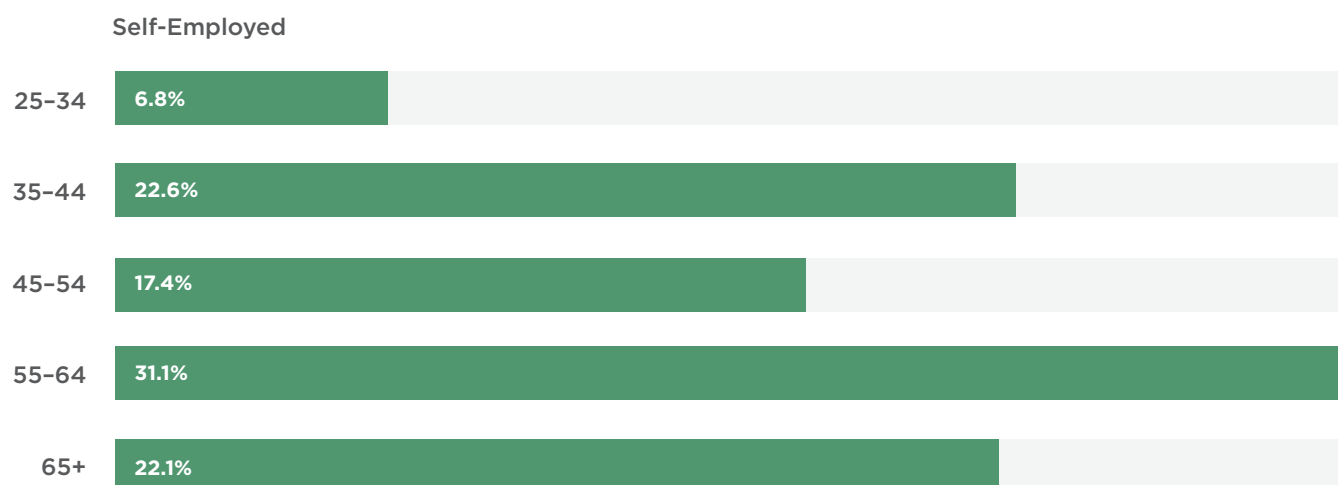


Figure 19: Self-Employment by Age

WORK LOCATION OF SELF-EMPLOYED MIGRANTS

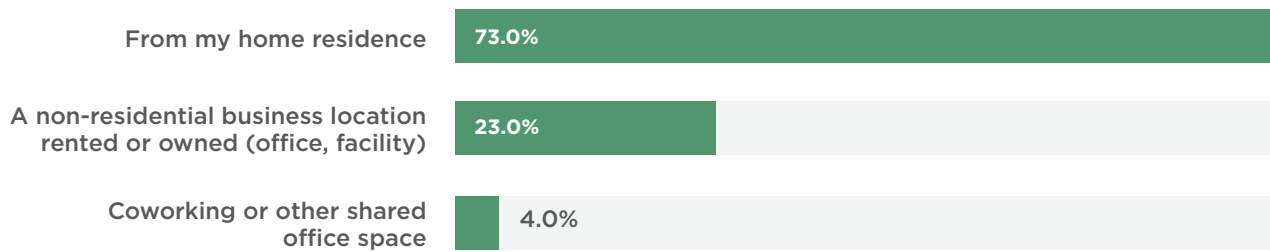


Figure 20: Work Location of Self-Employed Migrants

MOTIVATIONS FOR STARTING A BUSINESS IN MAINE

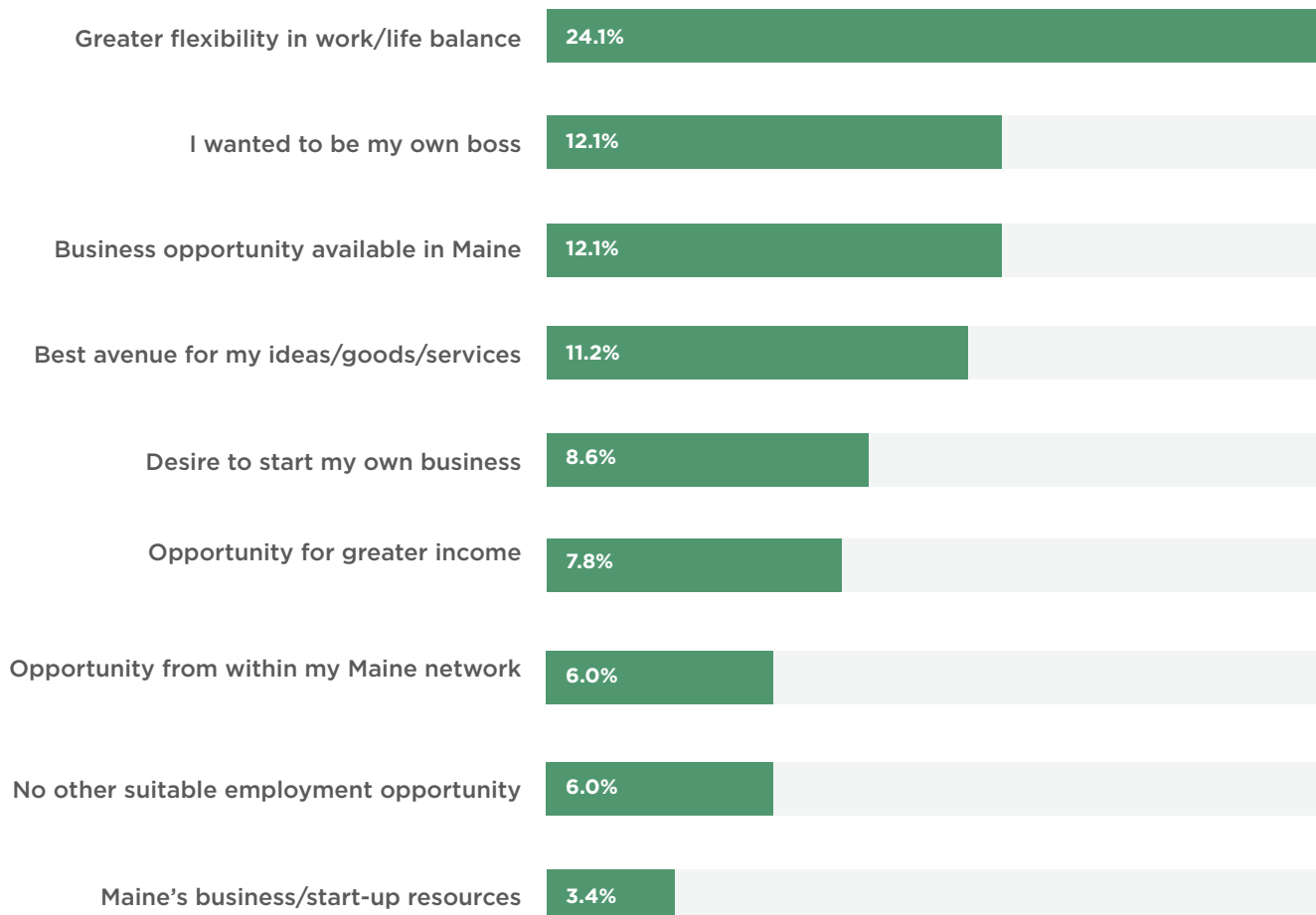


Figure 21: Motivations for Starting a Business in Maine

REMOTE WORK PREVALENCE

The 2020 coronavirus pandemic ushered in a wave of remote work as social distancing policies forced many jobs off-site. Challenging hiring environments for many organizations have further enabled remote work policies to continue by providing flexible-working benefits to workers engaged in work that does not require a physical presence. This has led, at least anecdotally, to greater mobility for individuals and households seeking to relocate.

Of the migrant population reporting as employed, nearly one-third (30%) reported *always* working remotely, and 11% reported working remotely *most of the time* (Figure 22).⁴⁴ Another one-third of employed respondents (31%) reported never working remotely and 6% reported working remotely was not an option. As a percentage of the total migrant population, this amounts to 16.7% working remotely all the time.

EMPLOYER LOCATION

Implicit in the attraction of new workers to the state is the assumption new workers would be employed with Maine-located employers. However, as survey responses show, this is not necessarily the case for remote workers. Overall, 57% of employed migrants reported working for an employer with a physical location in Maine, while 43% reported working for an employer with *no physical location* in Maine.⁴⁵

Figure 23 shows remote work frequency by physical presence of the employing organization in Maine. Migrants

working remotely primarily work for employers located outside the state of Maine. Sixty-eight percent (68.1%) of migrants reported always working remotely if employed by an organization with no physical presence in Maine, while another 15.2% work remotely most of the time for an out-of-state employer. About 10.5% of migrants work on-site (do not work remotely) for an organization with no physical presence in Maine, including individuals for whom remote work is not an option.⁴⁶

On the contrary, for migrants employed by an organization with a presence in Maine, nearly 54% *never* work remotely, including in situations where remote work is not an option. Considering geography, migrants in the Southern Maine region are more likely to work remotely *occasionally* or *never* when an employer is located outside of Maine. This implies cross-border commutes to neighboring states, such as New Hampshire or Massachusetts.

EMPLOYMENT CONTINUITY

Respondents were asked whether they worked for the same employer and what their work arrangement was before they moved to Maine.⁴⁷ Fifty-nine percent (59%) of employed migrants reported working for a new employer since moving to Maine (Figure 24). Forty percent (40%) reported working for the same employer, including 15% who worked fully remotely, 14% at a physical office location, and 11% who had some sort of hybrid work arrangement—a migrant who both commuted to a physical work location and worked remotely.

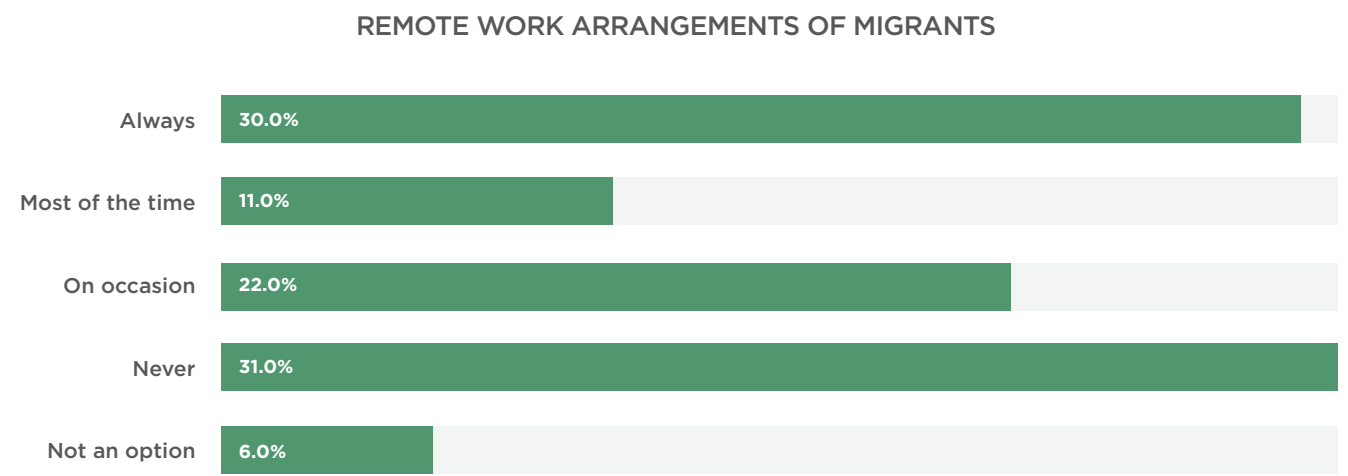


Figure 22: Remote Work Arrangements of Migrants

PRESENCE OF EMPLOYING ORGANIZATIONS IN MAINE

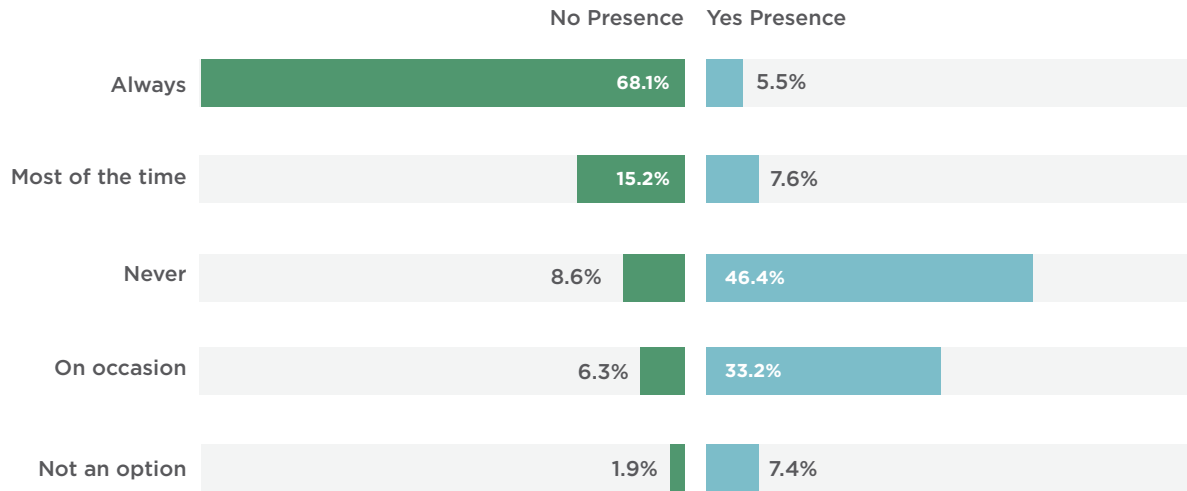


Figure 23: Presence of Employing Organizations in Maine and Remote Work

PREVIOUSLY EMPLOYED BY EMPLOYER

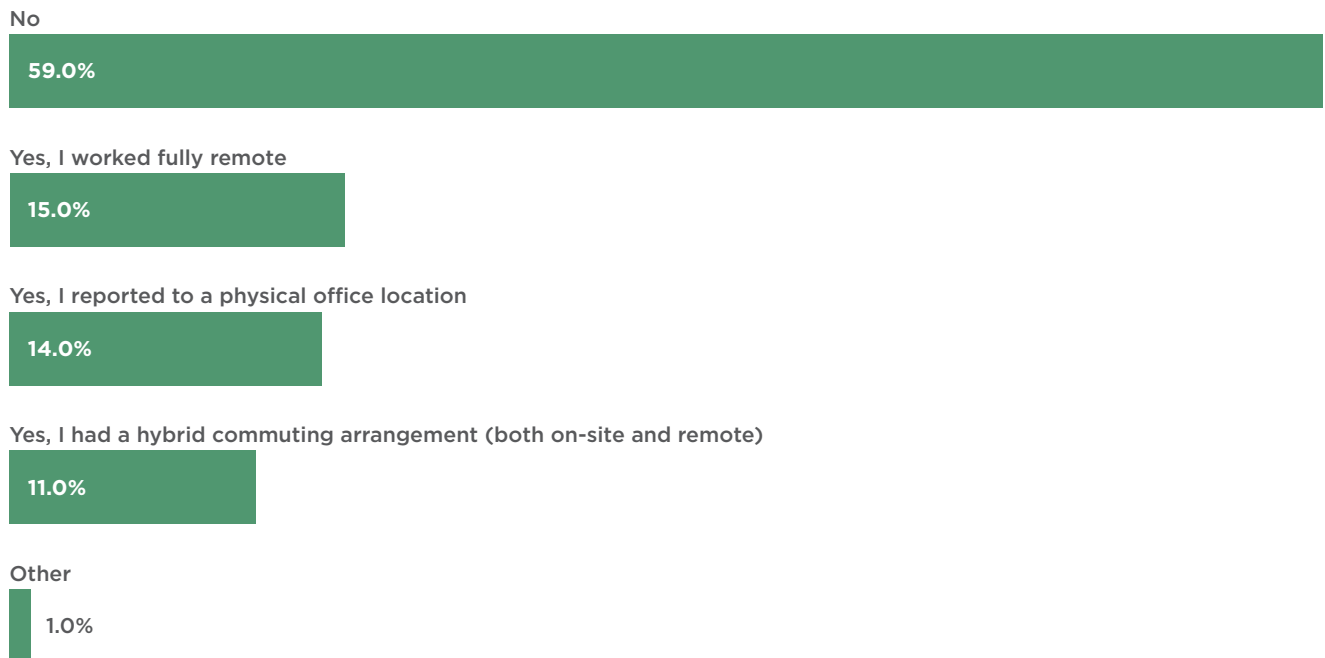


Figure 24: Previously Employed by Employer



REMOTE WORK AND THE DECISION TO MOVE TO MAINE

Remote work, especially since the 2020 pandemic, has influenced where and how people move to varying degrees.⁴⁸ Respondents who previously reported working remotely were asked how the ability to work remotely influenced their decision to move to Maine.⁴⁹ More than 80% indicated that working remotely enabled them to keep their job while making the move (Figure 25). Another 4% reported that it enabled a partner or spouse to make the move and keep their job. Almost 14% reported it made no difference.

EMPLOYMENT CONSIDERATION WITH MAINE-BASED EMPLOYER

Of those working for an organization or business not located in Maine, 44% (24% of all employed migrants) reported they *would* consider working for a Maine-based business, organization, or government, while the remaining 56% (33% of all employed migrants) said they would

not consider it.⁵⁰ Respondents were asked to provide additional information about why they would or would not consider employment with a Maine-based employer.

Figure 26 shows the share of coded responses by whether the respondent considered or did not consider employment with a Maine-based employer. Nearly 20% of respondents who have yet to consider employment with a Maine-based organization reported doing so because they liked their current job, while almost 19% reported compensation was not competitive, and another 12% reported a lack of opportunities for their skills.

For respondents who have considered employment with a Maine-based organization, the competitiveness of compensation (7.8%) and lack of opportunities for skills (7.5%) were the biggest concerns about making a switch. However, almost 7% reported to were currently considering or exploring Maine-based employment, while nearly 6% of respondents reported community involvement and the local economy as motivating factors.

HOW DID THE ABILITY TO WORK REMOTELY FACTOR INTO YOUR DECISION TO MOVE TO MAINE?

It enabled me to keep my job while making the move

81.3%

It did not make a difference

13.5%

Enabled partner/spouse to move

4.1%

Other

3.7%

Figure 25: How Did the Ability to Work Remotely Factor into Your Decision to Move to Maine?

REASONS FOR CONSIDERING OR NOT CONSIDERING EMPLOYMENT WITH A MAINE-BASED EMPLOYER

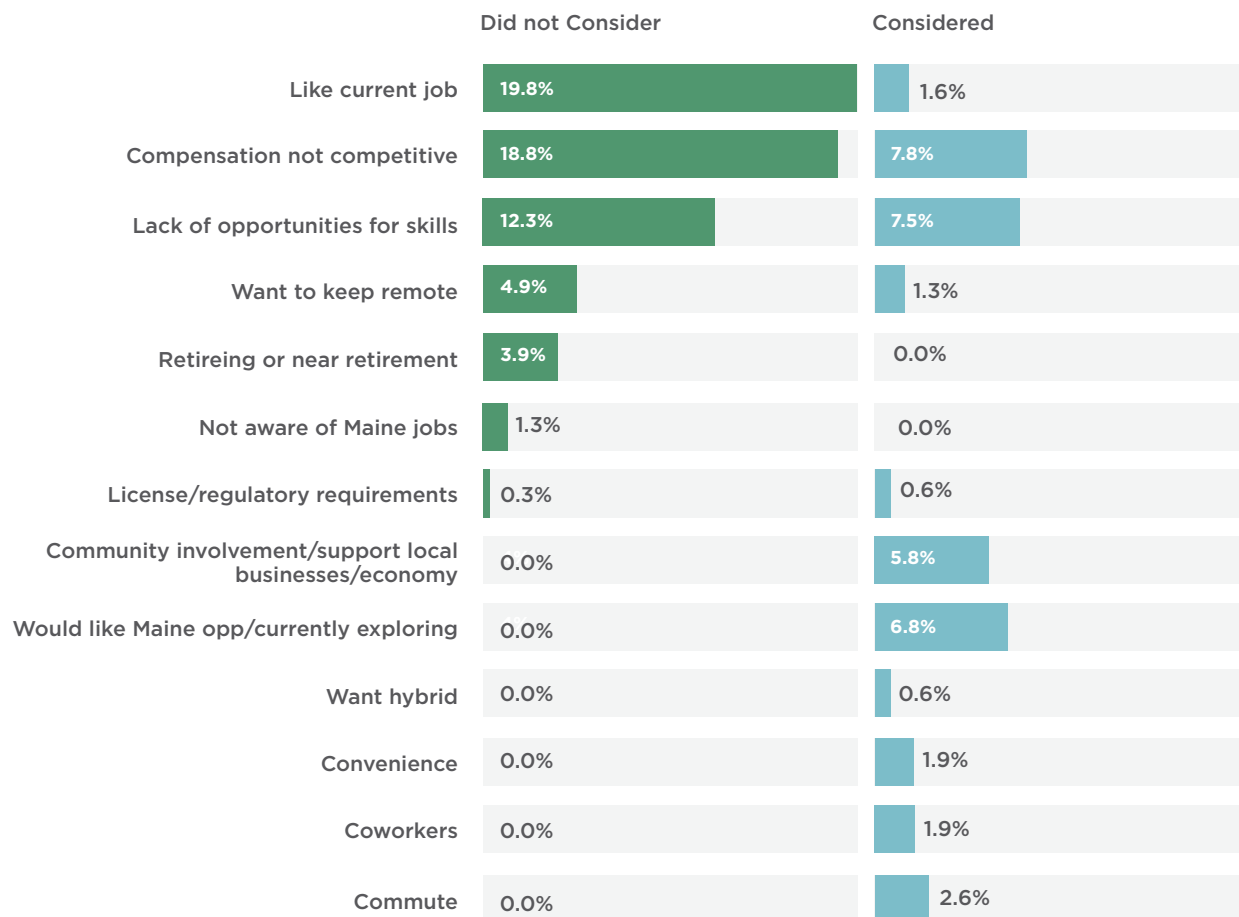


Figure 26: Reasons for Considering or Not Considering Employment with a Maine-based Employer

Connections and Motivations for Moving to Maine

PREVIOUS EXPERIENCE OR CONNECTIONS WITH MAINE

Rarely do people move to a new place without any previous connection to it, including social connections or past experience. The extent to which previous experiences or connections exist and their role in migration decisions is unclear. To help answer these questions, migrants were asked to indicate the extent of previous experience or connections to Maine for themselves and any partner or spouse.⁵¹ Figure 28 shows the share of respondents (or households) reporting any previous connections or experience with or in Maine for themselves or a partner

or spouse. Respondents could select multiple connections, and the results should be interpreted with this in mind.

Nearly two-thirds (65%) of migrants or their partner or spouse reported having vacationed or recreated in Maine in the past. Social connections were also highly relevant—43% of either self or partner or spouse reported having family members in the state, while 39% reported having friends living in Maine. One percent of migrants (self or partner/spouse) reported no previous connections to Maine.

PREVIOUS EXPERIENCES OR CONNECTIONS TO MAINE

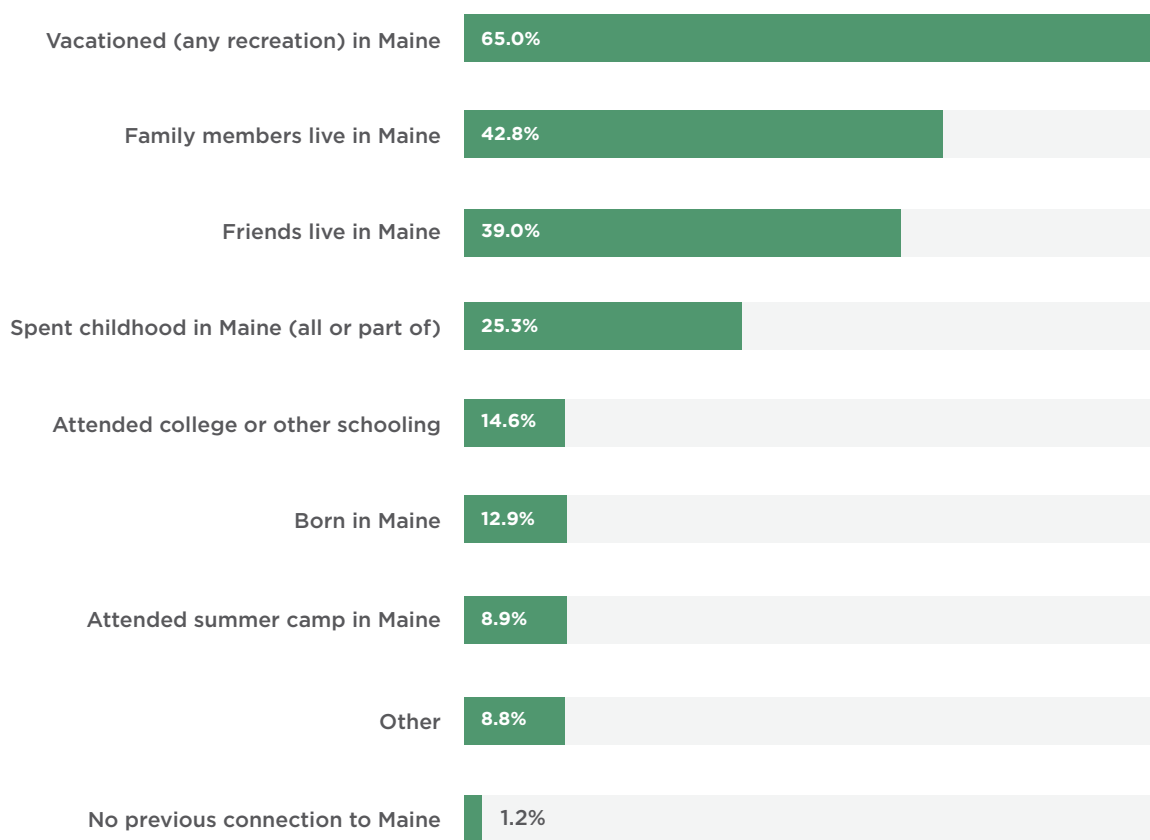


Figure 27: Previous Experiences or Connections to Maine, Either Self and Partner or Spouse

“Boomerangs” is a term used to refer to people who spent some of their childhood in Maine. This could include being born in Maine, attending school here, or some other experience in their youth. Boomerangs are often cited as an important target group for attraction efforts, luring them back to the state. One-quarter (25.2%) of migrants (self or partner or spouse) spent some or all of their childhood in Maine, while 15% attended college, 13% were born in Maine, and 9% attended a summer camp in Maine. To be clear, there is likely to be some overlap between these populations as they are not mutually exclusive.

“A favored vacation spot became a permanent home.”

REGIONAL DIFFERENCES

There were minor differences in the share of migrants with reported Maine connections for some regions, though no significant deviations from the statewide share were reported in Figure 27.⁵² Regional differences are shown in Figure 28.

A slightly higher share of respondents in the Lakes and Mountains and Kennebec Valley region indicated having vacationed before moving compared to other regions, while this was less so in the Midcoast region. Social connections (family and friends) were relatively less important in the Kennebec Valley region compared to other regions in the state. However, one-third of respondents in those regions indicated family or friends lived in Maine before moving. The Highlands regions also saw a slightly

PREVIOUS EXPERIENCES OF CONNECTIONS FOR SELECTED FACTORS BY REGION

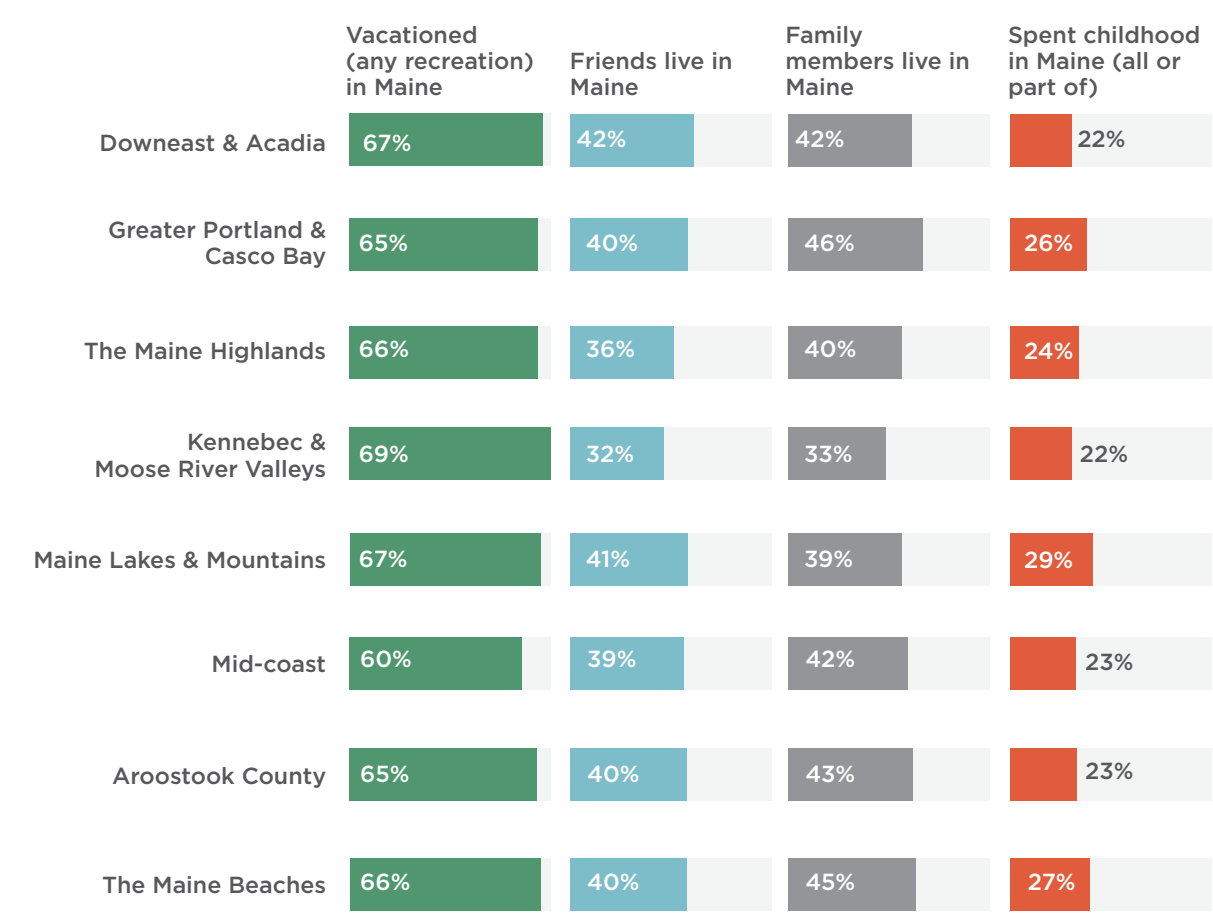
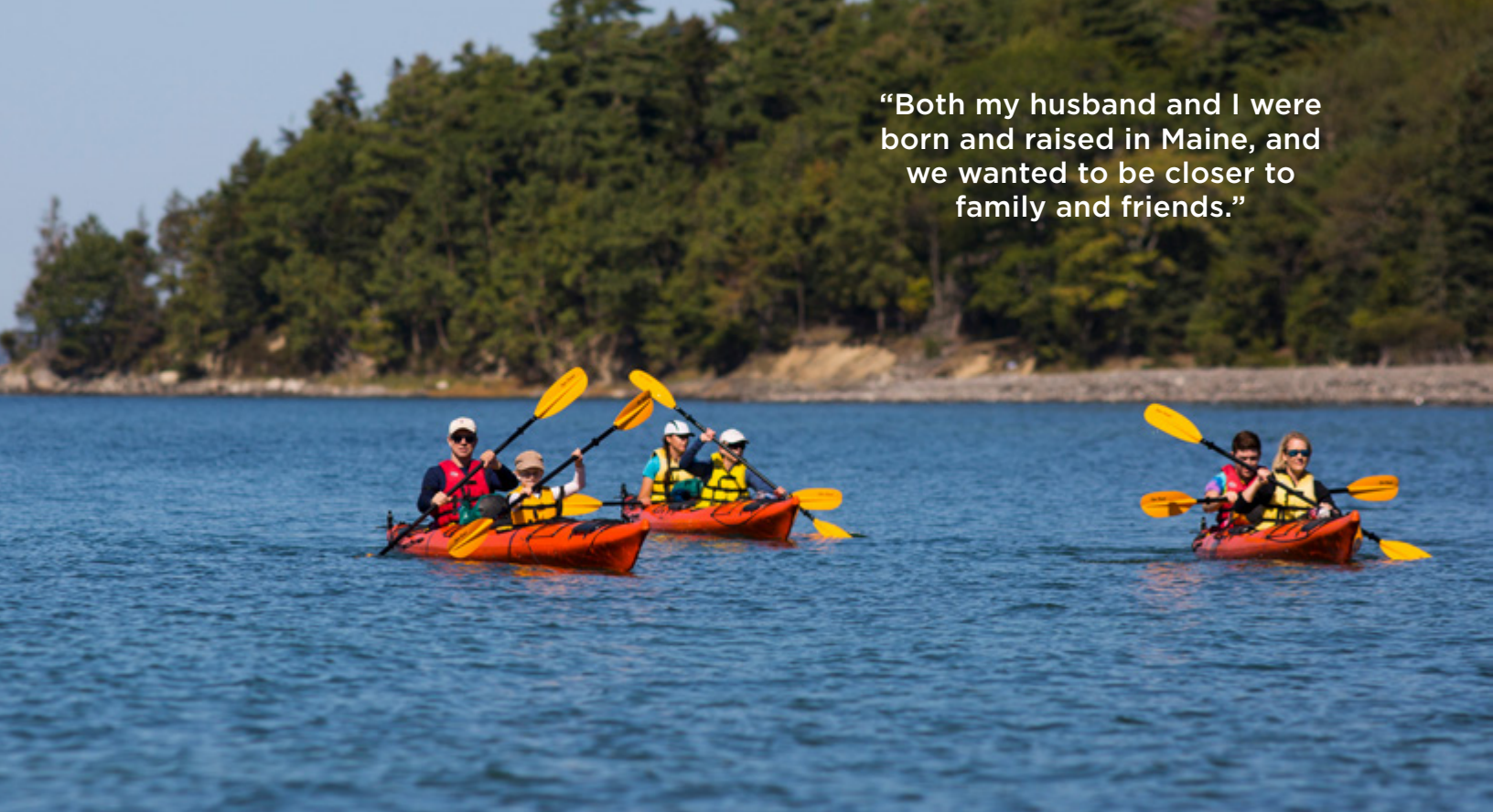


Figure 28: Previous Experiences of Connections for Selected Factors by Region



“Both my husband and I were born and raised in Maine, and we wanted to be closer to family and friends.”

smaller percentage of respondents indicating social connections before moving. Social connections were slightly more prevalent for migrants in the Greater Portland and Southern Maine and Beaches regions.

Migrants or their partners or spouses in the Lakes and Mountains region were more likely to have spent part or all of their childhood in Maine (29.2%) than other regions. A smaller share of respondents in Downeast and Acadia (21.5%) and the Kennebec Valley (22%) regions reported having spent some or all of their childhood in Maine.

FACTORS OF INFLUENCE IN DECISION TO MOVE TO MAINE

“Convenience and access to outdoor spaces and activities strongly appealed to me.”

“Cost of living, access to outdoor recreation, and proximity to family were the biggest factors.”

Respondents were asked to rate the influence of a number of factors on their decision to move to Maine using a 5-point scale—1 indicates *No Influence at All*, and 5 indicates an *Extremely Strong Influence*.⁵³ When respondents did not report a rating for a factor, it was assumed to have *No Influence at All* and was coded as such in the analysis. Answers were then used to calculate a relative weighting index that can be viewed as a weighted average for each factor (Figure 29).

Overall, outdoor recreation amenities had the greatest influence on decisions to move to Maine across all migrants. Social connections and community safety ranked the second and third most influential factors. Employment opportunities ranked in the middle of the pack, along with cultural and entertainment amenities and the ability to work remotely. Other factors ranking lower are likely influential to specific groups of migrants rather than the broader population. Social media posts, however, had little influence.

The following subsections discuss the distribution of responses across influence scores, which provides a more appropriate gauge of the influence of specific factors on specific migrant groups.

OUTDOOR RECREATION AMENITIES

The most important factor, on average, for all migrant households was Outdoor Recreation Amenities. One in four respondents indicated outdoor recreation amenities were an *extremely strong influence* on their decision to move to Maine, and another 26% reported outdoor recreation amenities as a *somewhat strong influence* (Figure 30). Twenty-one percent (21%) of respondents, by far the lowest share of any factor, reported outdoor recreation amenities did not influence their decision to move to Maine.

The influence of outdoor recreation amenities on migrant location decisions was remarkably consistent across regions, with only slight differences. Migrants in the Highlands region were only modestly more likely

to indicate outdoor recreation as a strong influence (somewhat or extremely). Migrants located in Northern Maine and the Southern Maine and Beaches regions were slightly more likely to report outdoor recreation did not influence their decision to move to Maine.

The influence of outdoor recreation amenities was also similar across age cohorts, with some modest differences. Younger populations were slightly more likely to indicate a strong influence (somewhat or extremely) of outdoor recreation amenities than older age cohorts. However, the age cohort 65 and over had a higher share, reporting a moderate influence of outdoor recreation amenities on their decision to move.

FACTORS THAT INFLUENCED THE DECISION TO MOVE TO MAINE

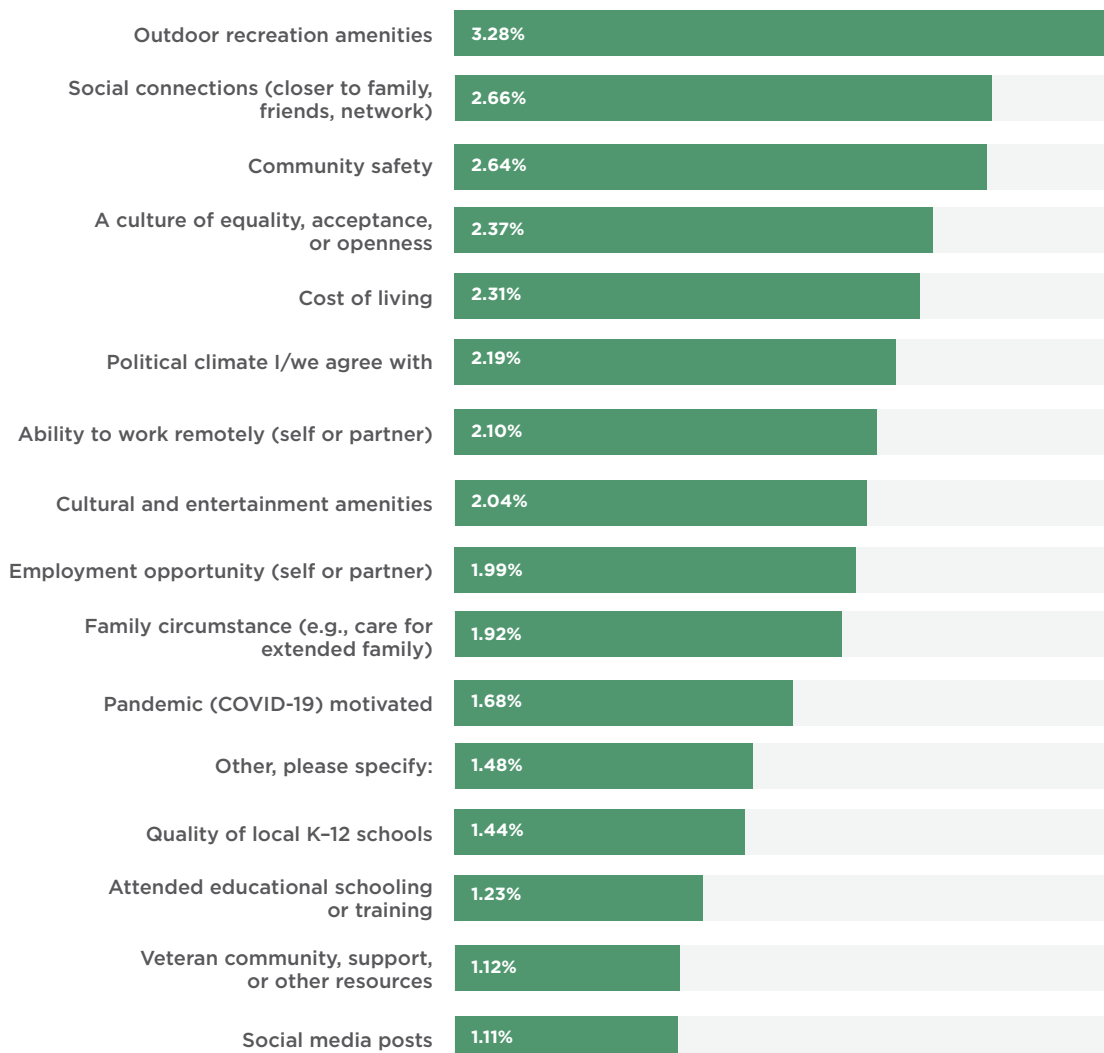


Figure 29: Relative Weighting Index of the Factors that Influenced the Decision to Move to Maine



SOCIAL CONNECTIONS

“Family members and friends moved to Maine. We moved to be closer to family/friends and enjoy outdoor activities together more often.”

Social connections (proximity to family, friends, or network) ranked as the second most important influence factor relative to other factors (Figure 29). One-quarter of respondents indicated social connections had an extremely strong influence and another one-quarter indicated social connections had a moderate or somewhat strong influence on their decision to move to Maine. Almost 44% indicated social connections did not influence their decision to locate in Maine.

COMMUNITY SAFETY

“Maine is a beautiful, safe state. Safety and well-being for my kids was key for me.”

Statistically, Maine is one of the lowest crime states in the country, a statistic that is often promoted as an attractive characteristic of Maine’s communities. More than half (54%) of respondents reported community safety had at least a moderate influence on their decision to move to Maine—roughly one-third of respondents reported community safety as a strong influence, including nearly 14% stating it was an extremely strong influence. Thirty-seven percent reported community safety did not impact their decision to move.

COST OF LIVING

“Cost of living, access to outdoor recreation, and proximity to family were the biggest factors.”

Relative to many places, Maine is typically *perceived* to have a lower cost of living than other places in the country, especially in comparison to large metropolitan regions. Two out of five (44%) respondents reported that the cost of living was at least a moderate influence, with just over 7% reporting the cost of living as an extremely strong influence. Just over 40% indicated that the cost of living did not impact their decision to move to Maine.

CULTURE OF EQUALITY, ACCEPTANCE, AND OPENNESS

“I love the open-minded, friendly people and culture. When we came for summer jobs, we discovered a strong community of young people buying land and building homes off grid.”

“During our initial visit, we instantly felt that Maine was a place where we could be content for the long haul. The local culture deserves praise; it appears that those brought up in Maine tend to be good-hearted, well-intentioned, and compassionate.”

Approximately one in four (26%) respondents reported that having a culture that values equity, acceptance, and openness strongly (either somewhat or extremely) influenced their decision to move to Maine. Another 18% reported cultural openness as a moderate influence on their decision to move. Almost half (47%) of respondents reported cultural openness did not influence their decision to move to Maine.

POLITICAL CLIMATE

“I like the political openness of Maine. I feel like everyone is accepted.”

“Maine is a beautiful and safe state with a political climate that aligns with my beliefs.”

Respondents were also asked to indicate the extent to which the political climate influences their decision on where to move to Maine. While nearly half of respondents indicated no influence of the political climate, over 40% reported it was at least moderately important, with 20% indicating it was a strong influence (either strong or extremely strong).

EMPLOYMENT OPPORTUNITIES

“I applied to jobs across the country and accepted a position here. It has led to subsequent opportunities in the sector, a home purchase, and marriage. The outdoors and slower-paced lifestyle originally appealed to me.”

Employment opportunities for self or partner or spouse were reported as extremely important by about 15% of respondents, while 6% reported employment as a somewhat strong influence (Figure 30).⁵⁴ Although not explicitly addressed through survey questions, these households likely moved to the state primarily for a job. Employed persons working for a Maine employer were more likely to report a strong influence. Approximately one-third of which reported an employment opportunity was a strong influence—21% indicated an extremely strong influence.

ABILITY TO WORK REMOTELY

“Being able to keep my job and work remote was one of the biggest factors for my move. From what I’ve seen, the job market in Maine and the salaries aren’t keeping up with what’s needed to survive here.”

The ability to remote remotely was reported as a strong influence for 24% of respondents (including 16% reporting an extremely strong influence), while 68% of respondents reported working remotely has a minimal or no influence at all on the decision to move to Maine (Figure 30).⁵⁵ Employed migrants *not* working remotely were much more likely to report employment opportunities as a strong or extremely strong influence compared to respondents reporting remote work for self or a partner or spouse.

EMPLOYMENT OPPORTUNITY AND ABILITY TO WORK REMOTELY

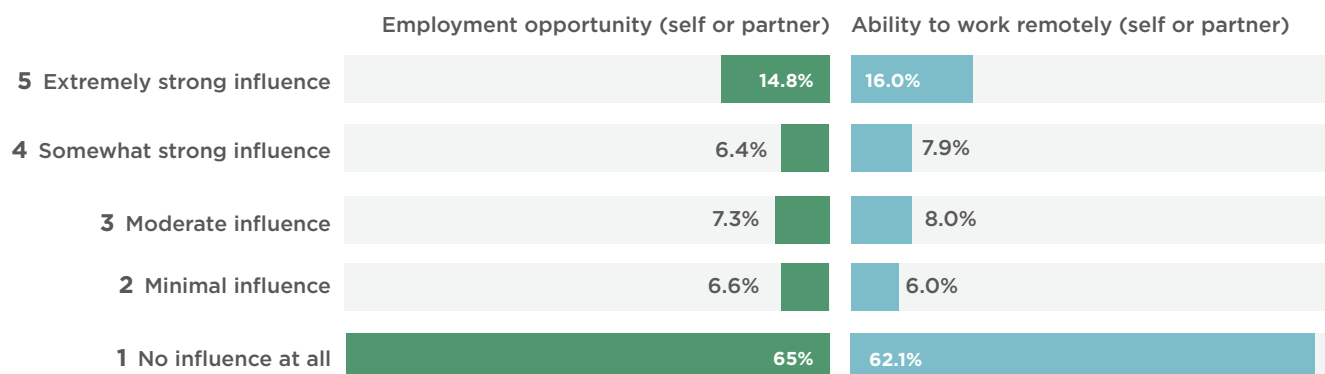


Figure 30: Scale of Factor Influence for Employment Opportunity and Ability to Work Remotely

FAMILY CIRCUMSTANCES

“Elder and sibling care occasioned the move, and remote work opportunities enabled it. It was a great community to raise my young family, which made it easy to make the jump.”

Family circumstances strongly influenced 12.5% of respondents, indicating they likely moved to the state largely because of a need to care for or be close to family (Figure 31). Another 14.5% reported family circumstances as a moderate or somewhat strong influence. More than two-thirds (67.5%) reported family circumstances did not impact their decision to move to Maine.

PANDEMIC RELATED

“Through the pandemic, I could work remotely from anywhere in the US. I chose Maine as I love the coast, forests, and the climate — yet I could still afford to move and live here compared to other states that fit my criteria.”

Figure 31 reports the pandemic’s influence, including all years of migration. Of the total migrant population, a majority (almost 80%) indicated the pandemic has minimal or no influence on their decision to move to Maine. However, as might be expected, the influence of the

pandemic was much stronger for migrants moving in 2020 and, to a lesser extent, 2021. Fifty percent of 2020 migrants reported the pandemic had at least a moderate influence on their decision to move, and 25% of 2020 migrants reported the pandemic as an extremely strong influence.

CULTURAL AND ENTERTAINMENT AMENITIES

“My partner lived here and I decided to move to live with him. I like living on the outskirts of Portland because of access to entertainment and outdoor recreational activities.”

Cultural and entertainment amenities provide opportunities for residents or tourists to experience live shows or sporting events, visit a museum, participate in personal interest groups or clubs, and eat at various restaurants, among other engagements. Although a smaller share of migrants reported cultural and entertainment amenities as extremely important (4%), almost one-third of respondents indicated a somewhat strong or moderate influence on their decision to move to Maine (Figure 32). Forty-one percent of migrants in the Greater Portland region indicated cultural and entertainment amenities were at least a moderate influence on their decision to move to Maine—the largest share of any region.

OTHER FACTORS

The quality of schools is a factor of influence most important to households with children. Of migrant households moving with school-aged children, one-quarter indicated the quality of local schools was at least a moderate influence on their decision to move to Maine, with the remaining 75% indicating it was not important or had a minimal influence.

Veteran resources, a factor appealing to a small share of migrants who reported veteran status, were not reported to be a significant factor of influence, even with migrants reporting veteran status. Just 8% of migrants reporting veteran status indicated veteran resources had at least a moderate influence on their decision to move.

No migrants reported social media posts as influencing their decision to move to Maine.

ALTERNATIVE REGIONS CONSIDERED

Respondents were asked what other states or regions they considered when making their location decisions. Figure 36 shows the share of migrants indicating a respective state (including no other states—“None”) ranked by the total share of respondents. Figure 33 is limited to states cited by at least 2% of respondents.^{56, 57}

Almost 30% of respondents reported they considered no states or regions other than Maine. The neighboring state of New Hampshire was most commonly cited as another state migrants considered moving to—21% of migrant respondents. Vermont was cited by almost 14% of respondents, and Massachusetts was cited by 12.5% of migrants, collectively suggesting a relatively higher preference for the New England region. Other non-New England states considered by migrants included North Carolina (8%), New York (7.4%), and Washington (6.3%), followed closely by Florida (6.2%) and Colorado (6.1%). Generally, the distribution reflects a strong preference for the northeastern U.S. and New England region and places with strong natural assets (NC, WA, CO, OR, CA, and FL).



PANDEMIC MOTIVATED AND FAMILY CIRCUMSTANCE

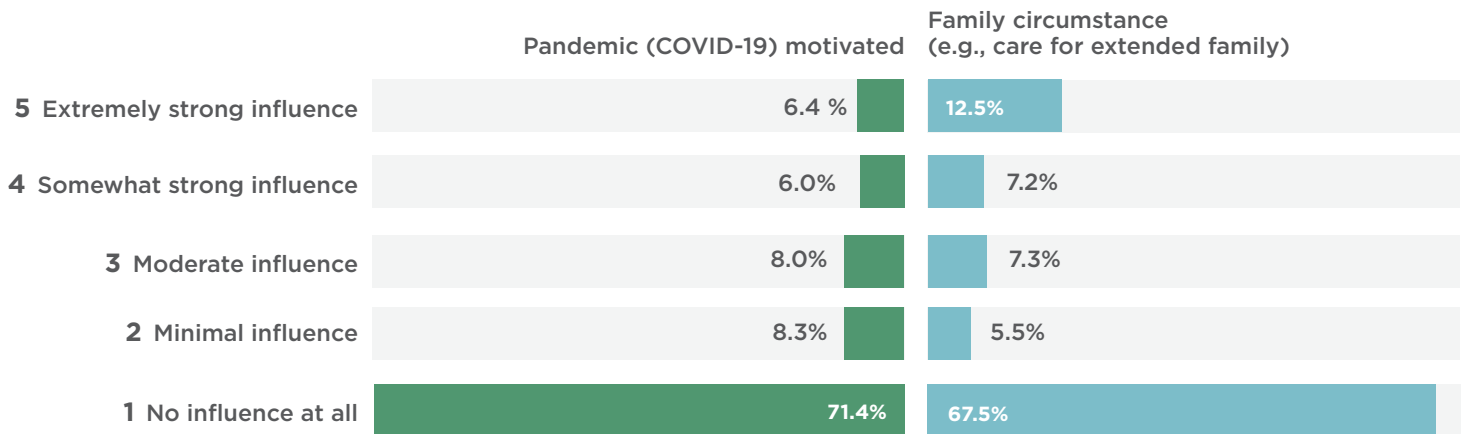


Figure 31: Scale of Factor Influence for Pandemic Motivated and Family Circumstances

CULTURAL AMENITIES AND ENTERTAINMENT

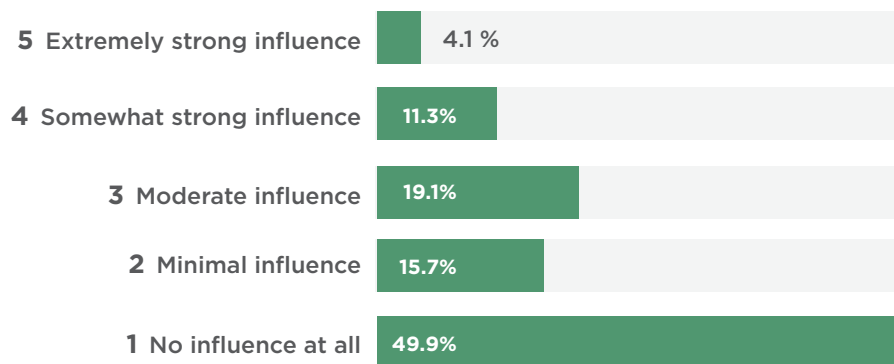


Figure 32: Scale Factor Influence for Cultural Amenities and Entertainment

CLIMATE, HOUSING, AND INCENTIVES

CLIMATE AND WEATHER INFLUENCES

“Effects of climate change compelled me to move north.”

“After the pandemic, our desire to be back on the East Coast drove our decision, but climate change and having friends already here made us choose Maine.”

The onset and increasing intensity of severe climate-related events has increased the propensity for households to move. Maine is often cited as an attractive destination for climate migrants.⁵⁸ To help evaluate the extent of climate-induced migration to Maine, respondents were asked what level of influence weather or climate-related issues had on their decision to move to Maine, relative to their previous location. Figure 34 shows the level of influence climate and weather had in a migrant’s move to Maine.⁵⁹

Nine percent of migrants reported that climate and weather had an extremely strong influence on their decision to locate in Maine. Another 13% reported climate issues and weather as a somewhat strong influence, and 19% reported it as a moderate influence. Nearly two out of five migrants reported that climate issues or weather had no influence at all.

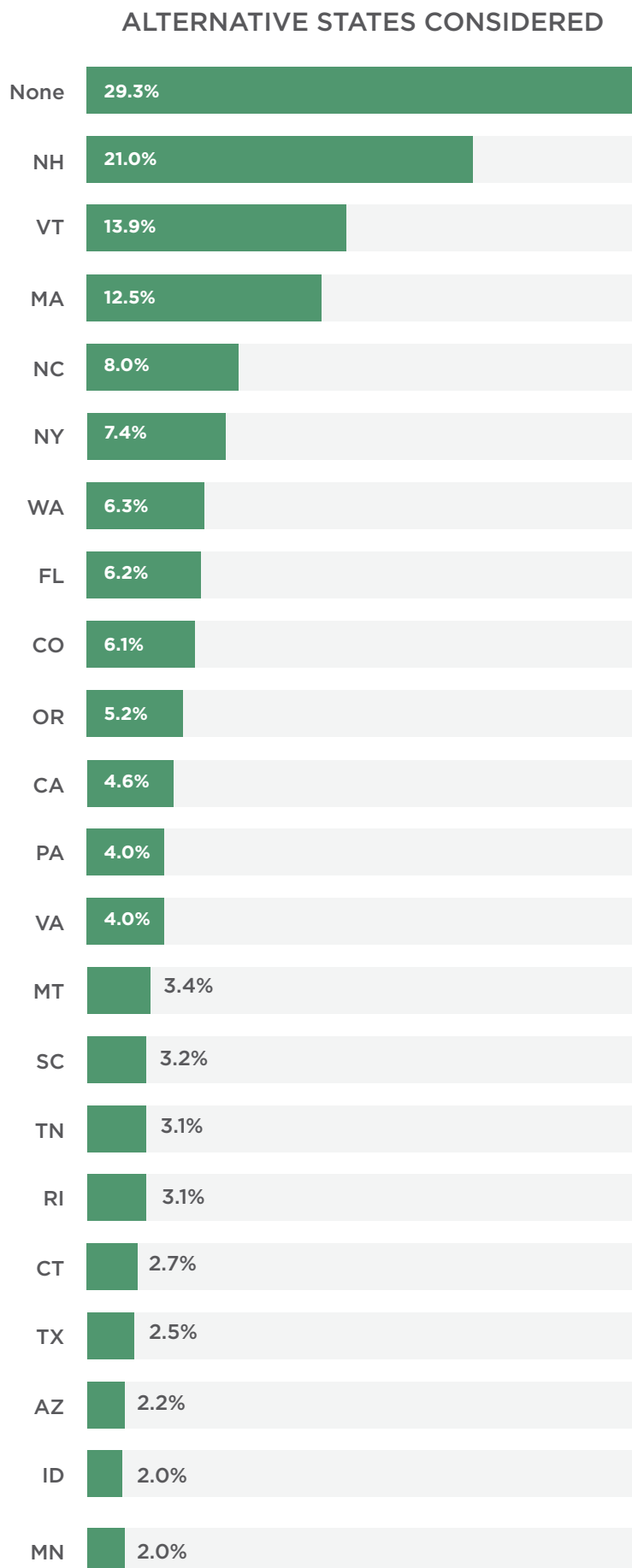


Figure 33: Alternative States Considered

“Climate change made me want to move north, away from the south.”

INFLUENCE OF CLIMATE AND WEATHER

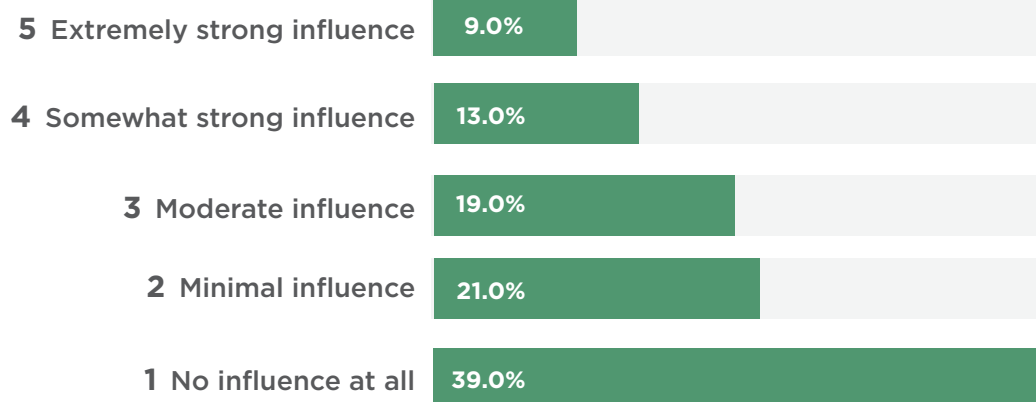


Figure 34: Influence of Climate and Weather

THE INFLUENCE OF HOUSING ON DECISION TO MOVE TO MAINE

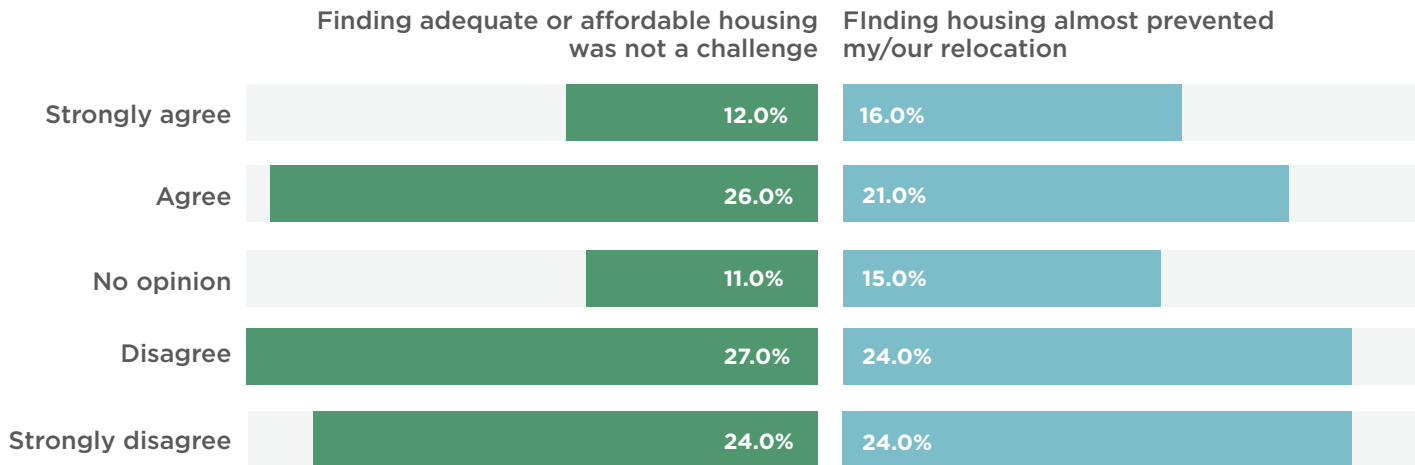


Figure 35: The Influence of Housing on Decision to Move to Maine

HOUSING

“Our primary reason for moving to Maine was for family. We hoped to find housing and property together that we could renovate but have been unable to. It’s been very disappointing. Currently, we are living with our family until we find property.”

“The cost of living and the housing market is crazy. Even with a double income, it doesn’t seem possible to move or own a home here.”

Housing affordability and accessibility are significant challenge across the state and are believed to be driven in part by increased demand from recent waves of in-migration.⁶⁰ Respondents were asked the extent to which their experience with finding affordable and adequate housing influenced their decision to locate in Maine.⁶¹ Figure 35 shows the share of respondents agreeing or disagreeing with the referenced statements.

Migrants were more likely to experience challenges finding adequate or affordable housing than not. When asked whether they agreed with the statement *“Finding adequate or affordable housing was not a challenge,”* more than 50% disagreed or strongly disagreed. Thirty-eight percent of respondents agreed or strongly agreed with

the statement, and 11% expressed no opinion. This is in line with the relatively higher household income levels and older aged populations reported by migrants having greater income and assets to afford rising housing costs.

When asked whether they agreed with the statement *“Finding housing almost prevented my/our relocation,”* more than one-in-three (37%) respondents agreed or strongly agreed, while 48% disagreed or strongly disagreed.

FINANCIAL INCENTIVES

“Partner’s job was the main consideration. Student loan repayment tax credit and outdoor recreation will keep us here.”

“One of the main reasons I stay in Maine is because of the opportunity Maine tax credit.”

Financial incentives have often been used to lure businesses to a state and, more recently, have been applied to the attraction of people. Maine currently does not offer direct incentives to people or certain populations moving to the state, however, this has been explored given that other state and regional incentives are being offered.⁶²

STATE OR REGIONAL FINANCIAL INCENTIVES



Figure 36: The Influence of State or Regional Financial Incentives

Respondents were asked whether another location had offered a financial incentive to locate in that state would have been enough to change their decision to move to Maine.⁶³ Sixteen percent reported it would have been enough to influence their decision on where to locate (Figure 36). More than half (52%) reported it would not have changed their mind. Almost one-third of respondents were unsure—likely depending on the types and magnitude of incentives offered.

INTENTION TO STAY IN MAINE

The majority of recent in-migrants plan to stay in Maine. Three-quarters of respondents indicated they had no current plans to leave the state (Figure 37). Seven percent stated they were presently considering moving outside of the state, and another 5% are planning to move away in less than 5 years.

Migrants who reported they are currently considering moving outside of Maine were asked what is motivating that decision. Although not a large sample, housing affordability and accessibility (44%) was stated as the primary factor motivating people to move outside of Maine—three percent of all migrants surveyed (Figure 38). Lack of employment opportunities was reported by 37% (including for both self and a partner or spouse) of people currently planning to move. Family-related reasons were cited by 17%.

When asked what the state of Maine could do to motivate them to stay, over one-third said there is nothing, while another 24% suggested addressing affordable housing and 13% suggested lowering taxes. Assistance finding employment or improved employment opportunities (7%) and improved healthcare (7%) were also cited as factors.



INTENTIONS TO CONTINUE LIVING AND WORKING IN MAINE

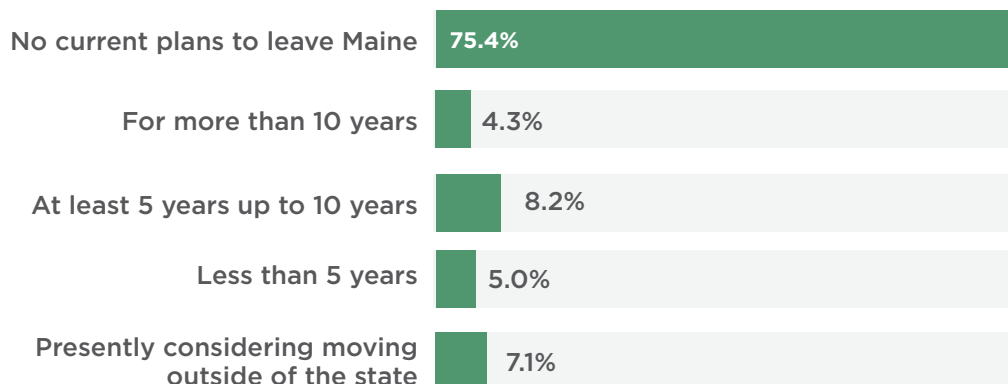


Figure 37: Intentions to Continue Living and Working in Maine

REASONS FOR CONSIDERING A MOVE OUT OF MAINE

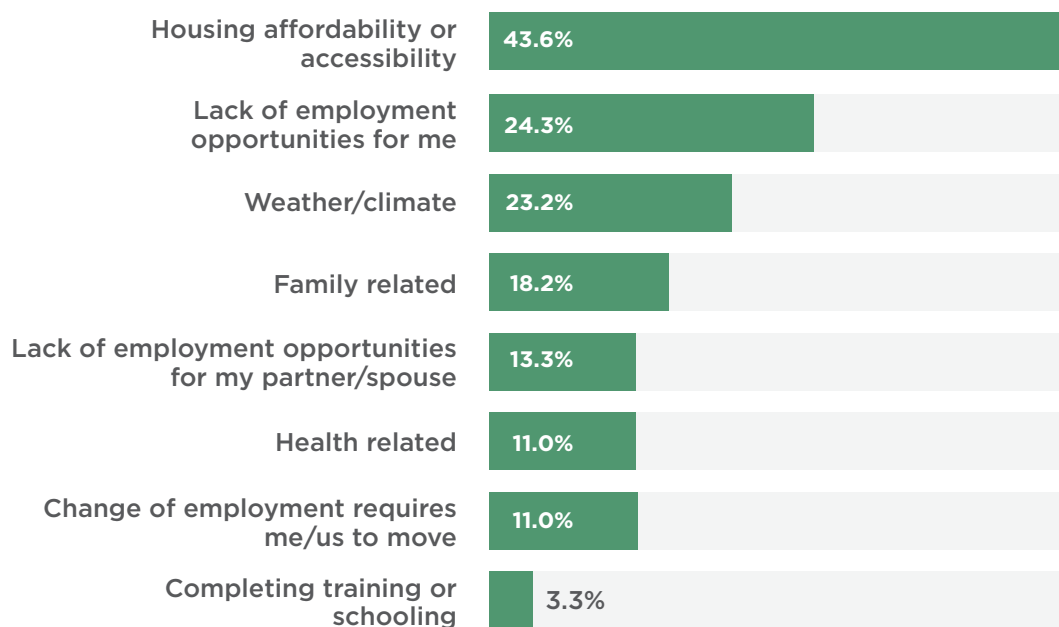


Figure 38: Reasons for Considering a Move Out of Maine

Discussion and Conclusion

This report provides foundational data and insights into the characteristics and motivations of people who have recently migrated to Maine and is intended to support efforts to stimulate and sustain the net in migration of workers and households, as well as workforce attraction efforts of Maine employers and supporting organizations. While a number of data points help validate anecdotal evidence, there are a number of important implications illuminated by the data.

People come to Maine because of a connection, whether to people, such as friends, family, or economic opportunity, or a connection to a place, such as the natural environment, cultural amenities, past experiences, or other affinity. Fundamentally, however, these connections are rooted in memories, feelings, and emotions that drive human behavior and are among Maine's most invaluable assets. Tapping into people's emotional connections and affinities for Maine's people, places, and environment, can be a powerful force in motivating behaviors and attracting people to move to Maine. The state's tourism marketing campaign is a successful model of this and can be a critical leverage point in developing messaging for motivating people to move to the state.

Ultimately, however, any progress towards achieving talent attraction goals must connect migration to local employment. Despite the positive jump in net migration in recent years indicated in Census estimates, it is important to acknowledge that approximately one-third of migrants in recent years account for progress towards talent attraction goals. In other words, only one-third of migrants go to work for a Maine-based employer. A bit less than half of migrants do not actively participate, or are not able to participate, in the labor force because they are not working age, retired, or other reason. Of those participating and employed, just 57% work for an employer with a presence in Maine. With respect to achieving the ten-year economic development strategy goals for talent attraction, using migration totals as a benchmark should be approached cautiously.

The reader and policymakers should be aware that the population and sample from which this analysis is based may result in an undercounting of employment and labor force participation. This may result from BMV driver's

license registrations underrepresenting younger populations more likely to be employed and overrepresenting older populations more likely to be retired. This would suggest that the estimates of employment status reported in this analysis underestimate the share of migrants employed or participating in the labor force. Although we do not believe the difference to be dramatic, it would suggest that recent working-age migrants have somewhat higher rates of employment than the general population. Still, considerations about the sample population aside, policymakers should understand that estimates from the Census do not directly translate to employment or labor force gains or losses in the context of workforce attraction. Thus, workforce attraction activities should target the specific groups more likely to participate in the Maine labor pool.

Although remote work is clearly an important factor enabling migrants and households to move to Maine, transitioning to local employment may be more challenging for reasons such as lower relative wages and more limited job opportunities. Developing or creating a means to help connect remote workers to local opportunities may help.

Recent migrants are comparable to those of decades ago in that they have higher levels of income and wealth, bringing higher economic impacts on the state's communities and economies. While higher incomes and spending typically help support more employment opportunities and tax revenues in many respects, it has undoubtedly contributed to or exacerbated challenges in housing markets across the state. Housing supply remains limited in most state regions, while demand pressures continue to drive higher prices – more easily absorbed by households with higher incomes.

Similarly, climate migration is real, and people recognize Maine as an attractive refuge relative to other places. It is clear that people are thinking about the issue and acting on it. While not an immediate short-term concern, over longer time horizons and as climate-related risks increase, climate migration to Maine is anticipated to trend upwards.

Maine is well-positioned to capitalize on its vast assets and attract people to Maine, just as it did decades ago. However, careful planning to accommodate and address the pressures from heightened workforce migration will be important to ensuring success over the long term.

End Notes

- 1 The implications are discussed in more detail in Sections 4 and 6.
- 2 See Ploch, Louis. “Immigration to Maine: 1975–1983” (1988). Maine Agricultural Experiment Station Bulletin 820.
- 3 Maine State Planning Office, “Why Households Move: Two Maine Surveys, 1999” (1999). State Planning Office. 45.
https://digitalmaine.com/spo_docs/45
- 4 <https://www.maine.gov/portal/residents/moving.html>
- 5 While it is likely that not every person of driving age that moves to Maine is a licensed driver or obtains a Maine driver’s license, we assume the vast majority of people do
- 6 <https://www.fhwa.dot.gov/policyinformation/statistics/2022/>
- 7 Non-Maine domiciles included all other U.S. states and the District of Columbia, as well as Canadian provinces. The population does not include other international domiciles. Information provided was limited to first and last name, reciprocal state, address at time of license registration, and email address if available. Although a specific date of registration was not provided, the list was compiled for registrants between 2019 and 2023.
- 8 Email addresses were “cleaned” for obvious typos that typically included updating the domain address (e.g. changing @gmal.co to @gmail.com. However, we have no way to identify other typos that would generate an invalid email address. During administration, approximately [?]
- 9 More than 6,000 (10.6%) recruitment emails bounced back during distribution as a result of invalid email addresses, server errors, or other. Adjusting for bounce backs, the final response rate was 5%.
- 10 Based on survey question 2: *In what year did you most recently move to Maine?*
- 11 Although the recruitment population was based on driver’s license registration since 2019, individuals may have moved to Maine prior to 2019 which is reflected in this data.
- 12 See https://eig.org/wp-content/uploads/2023/05/EconReport_RemoteWorkersnotheMove2_Feb2022.pdf and <https://eig.org/remote-work-geography/>.
- 13 There are other known challenges with Census ACS estimates, including concerns with estimates of international immigration and relatively small sample sizes in the PUMS files that can lead to inflated sampling error.
- 14 Within this age cohort in Census PUMS estimates, persons aged 25–29 make up the larger of the distribution while persons aged 30–34 are consistent or slightly below the mean of other population cohorts.
- 15 Sample data was not weighted against Census estimates because of the issues and concerns cited here, and primarily because it was determined that the BMV data is the more appropriate representation of the population of interest.
- 16 These implications are discussed in more detail in Section 4 and Section 6.
- 17 Based on survey question 9: *What year were you born?*
- 18 There were no respondents under the age of 20.
- 19 Figure 3 retrieved from the Maine Office of Tourism https://motpartners.com/wp-content/uploads/2021/03/Maine_Regions.pdf.
- 20 Sourced from the U.S. Census
- 21 Based on survey question 7: *In which U.S. state did you reside prior to moving to Maine?*
- 22 Based on survey question 10: *What is your race and/or ethnicity? Select all that apply.*
- 23 Based on survey question 5: *Did you immigrate to the United States from another country at any time?* and 6: *In what year did you immigrate to the United States?*
- 24 Based on survey question 11: *Have you ever served on active duty in the U.S. Armed Forces?* and 12: *Did you move to Maine as part of your transition from military service to civilian life?*
- 25 Based on survey question 3: *What best describes your household composition when you moved to Maine?*
- 26 Based on survey question 4: *How many children that were under 18 at the time moved with you to Maine?*
- 27 Based on survey question 13: *What best describes your current housing arrangement?—Other, please specify:*
- 28 US Census 2022 (most recent year available) ACS 1-year estimates retrieved from FRED, Federal Reserve Bank of St. Louis; <https://fred.stlouisfed.org/series/MEHOINUSMEA672N>, August 13, 2024.
- 29 Based on survey question 14: *What was your total household income before taxes during the last calendar year?*
- 30 Survey question 37: *Do you or your partner or spouse participate in any of the following volunteer or charitable activities?*
- 31 Based on survey questions 15: *What best describes your primary employment status during the last three months? (n=2,547)* and 16: *What best describes the primary employment status over the last three months for both you and your partner or spouse? (n=1,625)*
- 32 Data for June 2024, seasonally adjusted retrieved from Maine Department of Labor, Center for Workforce Research and Information August 13, 2024.

- 33 Ibid.
- 34 However, it should be noted that the state's labor force participation is based on the population 16 and older. The sample includes migrants aged 20 and older. Typically, labor force participation rates for aged 16-19 are significantly lower than the general population due to school attendance. Therefore, the actual labor force participation of the full working aged migrant population is likely slightly lower, but overall higher than the state average.
- 35 While the employment status for a spouse or partner is collected, the year of birth for a spouse or partner is not collected. As a proxy, the age of the survey respondent (self) is used.
- 36 Based on survey questions 17 & 18: What best describes the employing organization for both you and your partner or spouse, if applicable? If more than one job, indicate for the primary source of income. The sample size for self is n=1,409 and partner or spouse totaled n=828.
- 37 Based on survey question 25: *What is the highest level of schooling or degree completed, either in the U.S. or other country equivalent? (included for both Self and Partner/Spouse, when relevant)*
- 38 Based on survey questions 22: *What is your primary occupation (profession or trade), whether or not you are currently employed? (For example: teacher, plumber, accountant, server, health care etc.)* and 23: *What is the primary occupation (profession or trade) for both you and your partner, whether or not currently employed? (For example: teacher, plumber, accountant, server, health care etc.)*
- 39 Occupational categories are based on the Standard Occupational Classification (SOC) system Major Categories (2-digit). Responses were coded according to these.
- 40 Based on survey question 19: *What best describes your business or professional practice?* n=191
- 41 Based on survey question 20: *What best describes the base location of your self-employment?* n=189
- 42 Based on survey question 21: *What best describes your primary reasons for starting a business in Maine? Select all that apply.*
- 43 Figure 20 is based upon a relatively small sample (n=59).
- 44 Based on survey question 26: *Do you ever work remotely for your current job?* (n=1,191)
- 45 Based on survey question 27: *Are you currently employed by a business or organization that has a physical location in Maine (office, factory, etc.)?*
- 46 These workers are assumed to commute out-of-state to a physical location for work.
- 47 Based on survey question 28: *Did you work for your current employer before moving to Maine?*
- 48 See https://eig.org/wp-content/uploads/2023/05/EconReport_RemoteWorkersnotheMove2_Feb2022.pdf and <https://eig.org/remote-work-geography/>.
- 49 Based on survey question 33: *How did the ability to work remotely factor into your decision to move to Maine? Select all that apply.*
- 50 Based on survey question 29: *Have you considered employment opportunities with a local Maine-based business, organization, or government? Why, or why not?*
- 51 Based on survey question 30: *Indicate previous experiences or connections to Maine before your move, for all persons shown. Select all that apply.* (n=2,295)
- 52 Criteria for identifying a deviation was at least 7% greater or lesser than the statewide average.
- 54 The shares reported in Figure 33 and the relative weighted index in Figure 29 are based on the full sample of respondents, not just employed persons as was used as the denominator in calculations in the Employment and Remote Work sections of this report.
- 55 Ibid.
- 56 Based on survey question 31: *What other U.S. states, regions, or places did you consider in your decision to move, if any?*
- 57 Percentages reflect the share of total responses that identified respective regions, which could be more than one. (n=1,765)
- 58 See Shi, L., Walton, A. A., Allred, S., Daniels, C., Hart, D., Levesque, V., Hauer, M., Moser, S., Osterburg, E., Peterson, J., Reidmiller, D., Wake, C., Weaver, R., & Wise, L. (2023). A Northeast Safe & Thriving for All (Issue October). https://d3esu6nj4wau0q.cloudfront.net/documents/NOAA_NEST_REPORT_2023.pdf.
- 59 Based on survey question 34: *What level of influence do you think weather or climate-related issues (more intense droughts, extreme storms, wildfires, etc.) had on your decision to move to Maine from your previous location?* (n=2,548)
- 60 See State of Maine Housing Production Needs Study at <https://www.maine.gov/future/housing?q=housing> and Housing Demand and Remote Work <https://www.nber.org/papers/w30041>.
- 61 Based on survey question 35: *Do you agree or disagree with the following statements regarding your ability to find appropriate housing in Maine upon your relocation.—Finding adequate or affordable housing was not a challenge. (n=588), Finding housing almost prevented my/our relocation (n=2,338).*
- 62 Refer to the report Talent Attraction Strategies in the U.S. prepared by Stepwise Data Research.
- 63 Based on survey question 36: *If other locations you considered moving to offered financial incentives such as tax credits or reimbursements, would that have been enough to change your decision to move there compared to Maine?* (n=2,545)
- 64 Based on survey question 38: *As of this moment, how long do you intend to continue living and working in Maine?*

ACKNOWLEDGEMENTS

This research was conducted by Wallace Economic Advisors LLC in partnership with the Maine Department of Economic and Community Development and the Maine Department of Labor. Funding was provided by the American Rescue Plan Act. WEA was the primary author of this report. WEA would like to thank Phoenix McLaughlin and the hundreds of recent migrants to Maine and survey respondents who provided the foundation for this analysis.

ABOUT THE MAINE MIGRATION RESEARCH PROJECT

The Maine Migration Project (MMP) is a research program generating essential data and information intended to help support private and public sector efforts focused on the recruiting and attracting out-of-state workers and job candidates and support the state's 10-year economic development strategy goals. The MMP comprises several core elements: recent migration trends, migration decisions of households, recruitment and attraction activities of employers, and other relevant information that can help inform workforce attraction and recruitment activities. Information on the Project can be accessed on the Maine Department of Economic and Community Development's (DECD) website.

ABOUT WALLACE ECONOMIC ADVISERS, LLC

Wallace Economic Advisors, LLC (WEA) provides economic research and consulting services to leading public and private sector organizations to support economic and workforce development. WEA works with clients in three niche practice areas: workforce and labor market dynamics, macroeconomic benefits of energy infrastructure, and government and public relations support. The principal investigator of this research was Ryan Wallace, PhD. Before serving as Principal of WEA, Ryan served as the Director of the Maine Center for Business and Economic Research at the University of Southern Maine and as Co-Director of the Maine EDA University Center for the University of Maine System. He also served on the state Revenue Forecasting Committee and on the Federal Reserve Bank of Boston's New England Public Policy Center.

MAINE.

ECONOMIC & COMMUNITY
DEVELOPMENT

maine.gov/decd

Beck O'Brien
South Portland
LD 1337

Other source for my in person testimony:

https://www.nextavenue.org/state-aging-in-oldest-state-maine/?utm_source=share&utm_medium=email&utm_campaign=email_article_share