

MAINE OFFICE OF TOURISM

Workforce Potential Employee Study
August 2025



INTRODUCTION

Introduction

The Maine Office of Tourism (MOT), in collaboration with the Maine Department of Economic & Community Development, the Maine Tourism Industry Association, and Miles Partnership, has embarked on a comprehensive initiative to address workforce challenges in Maine's tourism and hospitality sector. This project, funded through Federal ARPA funds, aims to develop a data-driven campaign to support the recruitment and retention of workers. The research draws on insights from past Maine workforce initiatives as well as national and international studies to ensure an informed and impactful approach. This secondary research includes recent studies by the Travel and Tourism Research Association (TTRA) and the World Travel and Tourism Council (WTTC).

This is the 4th component of the comprehensive Workforce study which focuses on the perceptions and interests of potential workers in the tourism/hospitality industry.



METHODOLOGY

Study Objectives

Use the workforce campaign developed from the results of the first 3 studies, to understand perceptions of the industry, motivators and deterrents, and interest in working in the industry pre and post viewing the ad campaign.

Method:

- » An online survey with 430 potential employees was conducted using panel providers.
- » Primary targeting was for people who currently work in the tourism/hospitality industry and reside in the following states:
 - » Connecticut, Massachusetts, New Hampshire, Rhode Island, Vermont, Delaware, New Jersey, New York, Pennsylvania, West Virginia, Virginia, California, Colorado, and Oregon.
- » Respondents who do not currently work in the tourism/hospitality industry but are considering a change in industry profession were included as well.



KEY TAKEAWAYS



THE CAMPAIGN MOVED THE NEEDLE, BUT CONDITIONS STILL MATTER

The campaign was moderately successful in shifting interest and perception. Interest in working in Maine's tourism/hospitality industry increased from **63% pre-campaign** to **70% post-campaign**, with nearly **half (48%) of respondents** expressing some willingness to relocate for a job, an increase of **6% points** after seeing the campaign.

However, the decision to uproot one's life and move to another state, whether across the country or from a nearby region, is a significant emotional, logistical, and financial commitment. It requires not only inspiration, but also reassurance of stability and support. This was reflected in the study results.

Implication:

The creative messaging is effective at piquing interest, particularly among those unfamiliar with the state, but interest alone is not action. The campaign can generate leads, but **conversion will depend on Maine's ability to address the real conditions these potential workers would face**: availability of affordable housing, competitive compensation, and year-round employment. These must be baked into any broader workforce strategy.

Maine must not only tell a compelling story, it must also offer a clear path forward with tangible resources that reduce the friction of making a major life change.



THE MOST PERSUADABLE AUDIENCES ARE THOSE WITHOUT PRIOR CONNECTIONS TO MAINE

Respondents who had never lived in Maine but had visited demonstrated the greatest post-campaign interest, while those who never visited or lived in Maine had the greatest increase in interest after viewing the campaign.

Those unfamiliar with Maine's communities or workforce realities found the messaging aspirational, and in some cases transformative. Conversely, those who previously lived in Maine were more resistant to influence, likely due to deeper familiarity with the structural barriers the campaign does not (and cannot) fully resolve.

Implication:

The campaign resonates most with **out-of-state workers with a moderate-to-high openness to relocation and lifestyle change**. Future messaging should continue to romanticize Maine's natural beauty and work-life balance, **but pair that with practical information**: relocation support, cost of living expectations, housing availability, and community integration.



INTEREST IS NOT LIMITED BY INDUSTRY EXPERIENCE BUT AWARENESS IS

Nearly one-quarter of respondents had **never worked in tourism/hospitality**, yet they were **equally interested** in pursuing those jobs in Maine compared to those with prior industry experience. However, across all groups, a **lack of knowledge about career options** was consistently flagged as a barrier (26%).

Implication:

There is recruitment opportunity among those who have **interest in changing careers**. People who may be disillusioned with their current jobs or seeking lifestyle change but don't know what tourism/hospitality work entails. The campaign should **showcase a diversity of roles**, front-line service, operations, management, seasonal vs. year-round, to **educate and inspire entry** into the industry.



BARRIERS ARE STRUCTURAL, NOT JUST PERCEPTUAL

Respondents cited a range of deterrents: seasonal instability (29%), not knowing what careers exist in the field (26%), lack of benefits (23%), housing affordability (22%), and the perception of lower pay compared to other industries (22%) were the top concerns, echoing what was heard from Maine residents, current employees, and businesses. Notably, no single barrier dominated, indicating a **multifaceted hesitance rather than solely a perception problem.**

Implication:

This reinforces a critical insight from the broader study: the **workforce challenge is not a branding problem alone.** The narrative and perception work is very useful, and the campaign provides a suitable vehicle for inspiration and curiosity. However, it must be paired with **other efforts to reduce barriers.** For potential recruits, this means clearly **communicating what supports exist (or are being developed)** to ensure stable, sustainable employment in Maine's hospitality sector.

This would directly address the top concerns and position Maine not just as a beautiful place to live, but a feasible one to work and build a life.



REGIONAL VARIABILITY OFFERS TARGETING OPPORTUNITIES

Mid-Atlantic respondents responded most positively to the campaign, showing both stronger perceptions of the industry and greater willingness to relocate.

The perceptions of the industry and willingness to relocate improved for Western respondents, but their interest in working in Maine stayed the same.

New Englanders were slightly more cautious, likely due to closer familiarity with the real estate market and labor conditions.

Those who had visited Maine but never lived there were most responsive to the campaign and showed the strongest post-campaign interest.

Implication:

Campaign deployment should prioritize **geographies with high lifestyle migration potential**, those who are looking for a change and view Maine as aspirational rather than familiar. Messaging in New England could pivot to **career growth and economic opportunity**, while messaging farther away could focus on **quality of life, adventure, and community charm**.



MOTIVATORS ARE CONSISTENT AND ACTIONABLE

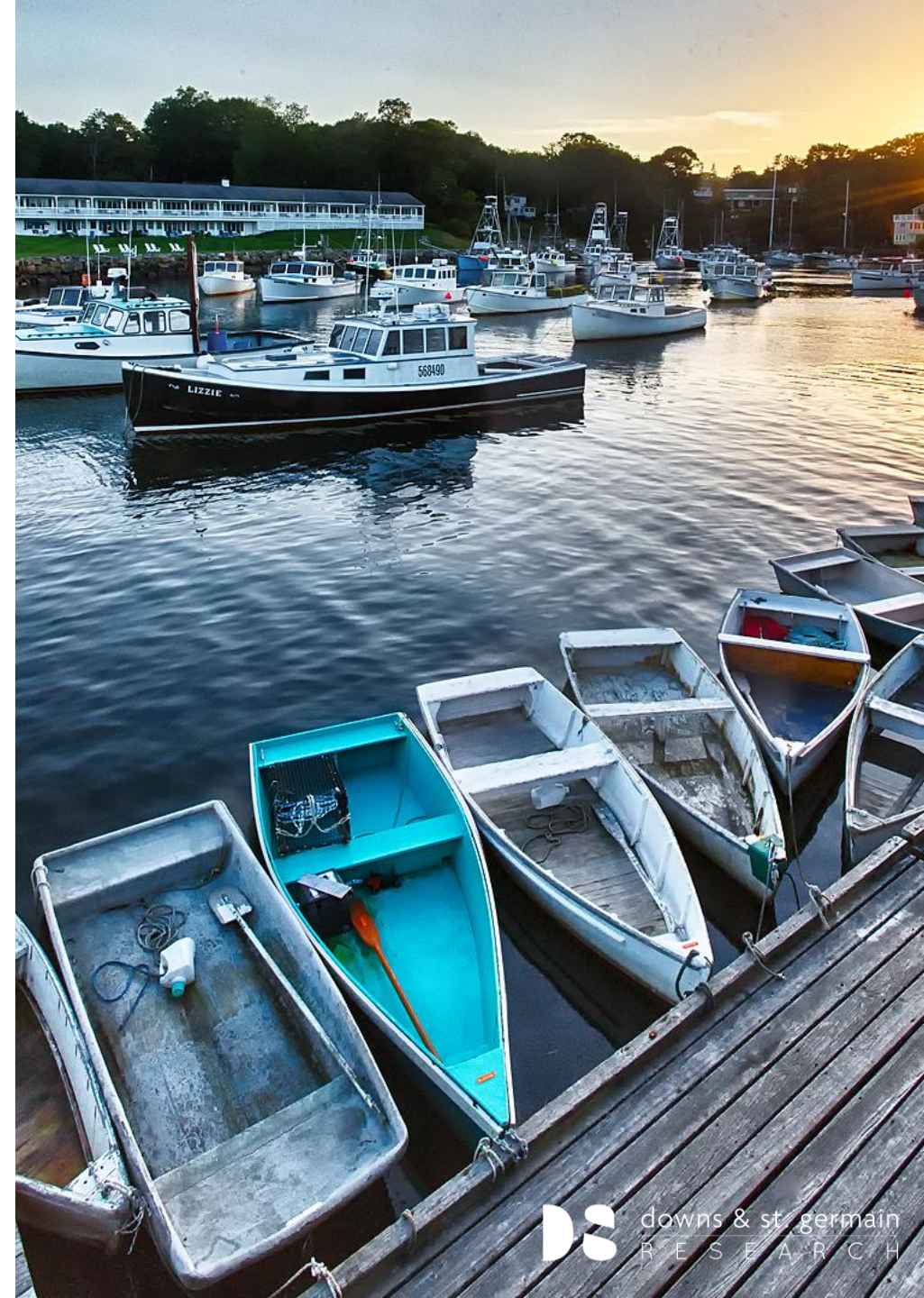
Respondents ranked **affordable housing, competitive pay, and work-life balance** as the most important motivators for considering a tourism/hospitality job in Maine. These motivators were consistent across demographics and geographies, and even more pronounced among those who may consider relocating depending on these conditions.

Implication:

To convert interest into action, the campaign must align with **resources for available support**. These could include:

- » Housing navigation assistance
- » Information on benefits or shared-service employer models
- » Job boards that focus on year-round employment continuity

Marketing can spark interest, but **recruitment and retention will depend on the infrastructure that meets these expectations.**



COMPARISONS OF AGE AND FAMILIES WITH CHILDREN

Respondents between the ages of 25–54 were the **most likely to already consider relocating to Maine** and showed **strong baseline interest in working in the industry**. In particular, those aged 35–54 had the highest levels of **interest in tourism/hospitality jobs in Maine**.

However, the **greatest campaign-driven increases** were seen among younger audiences.

Respondents **with children** were much more likely to express **interest in a tourism/hospitality job in Maine** and **greater willingness to relocate**, both before and after campaign exposure.

These individuals likely prioritize **stability, quality of life, and long-term opportunity**, all features the campaign addressed.

Interestingly, however, those **without children** showed the **greatest relative increase in interest after viewing the campaign**. This suggests the campaign successfully appealed to more mobile, flexible, or lifestyle-motivated workers.



COMPARATIVE THEMES ACROSS ALL FOUR STUDIES

Theme	Insight Across Studies	Implication
Housing & Cost of Living	All audiences, employers, workers, residents, and potential workers, cited affordable housing as a critical issue.	Recruitment campaigns must be in tandem with information on resources to support concerns about housing and job stability.
Seasonality & Instability	Seen as a major barrier by all audiences; even potential recruits perceive the risk of instability.	Messaging should address this directly, offering examples of year-round pathways or job transitions.
Benefits & Compensation	Lack of benefits is consistently cited; potential workers compare hospitality to public-sector jobs with full benefits.	MOT could explore shared benefit programs or position tourism as a lifestyle+income opportunity.
Perception of the Industry	While misperceptions exist, structural conditions remain a barrier.	The campaign was successful at piquing the interest of potential workers, but they still had questions about practical barriers for entry.
Relocation & Assimilation	Residents are skeptical of outsiders assimilating easily; potential workers want help with community integration.	A welcome/assimilation program would make Maine more livable for new recruits and boost retention.
Workforce Conduit Role	Employers seek help finding workers; workers want year-round continuity; potential employees need help navigating the system.	MOT could act as a conduit , not just promoter, helping connect workers to jobs and services.



STRATEGIC RECOMMENDATIONS FOR CAMPAIGN ALIGNMENT

1. Address Multi-Factor Barriers

Maine must not only tell a compelling story; it must also provide a clear path forward with tangible resources that ease the friction of making a major life change, such as pay, housing, job stability, and benefits. At the same time, no single issue is the root cause, success requires addressing these factors together.

2. Continue to Showcase Real People and Places

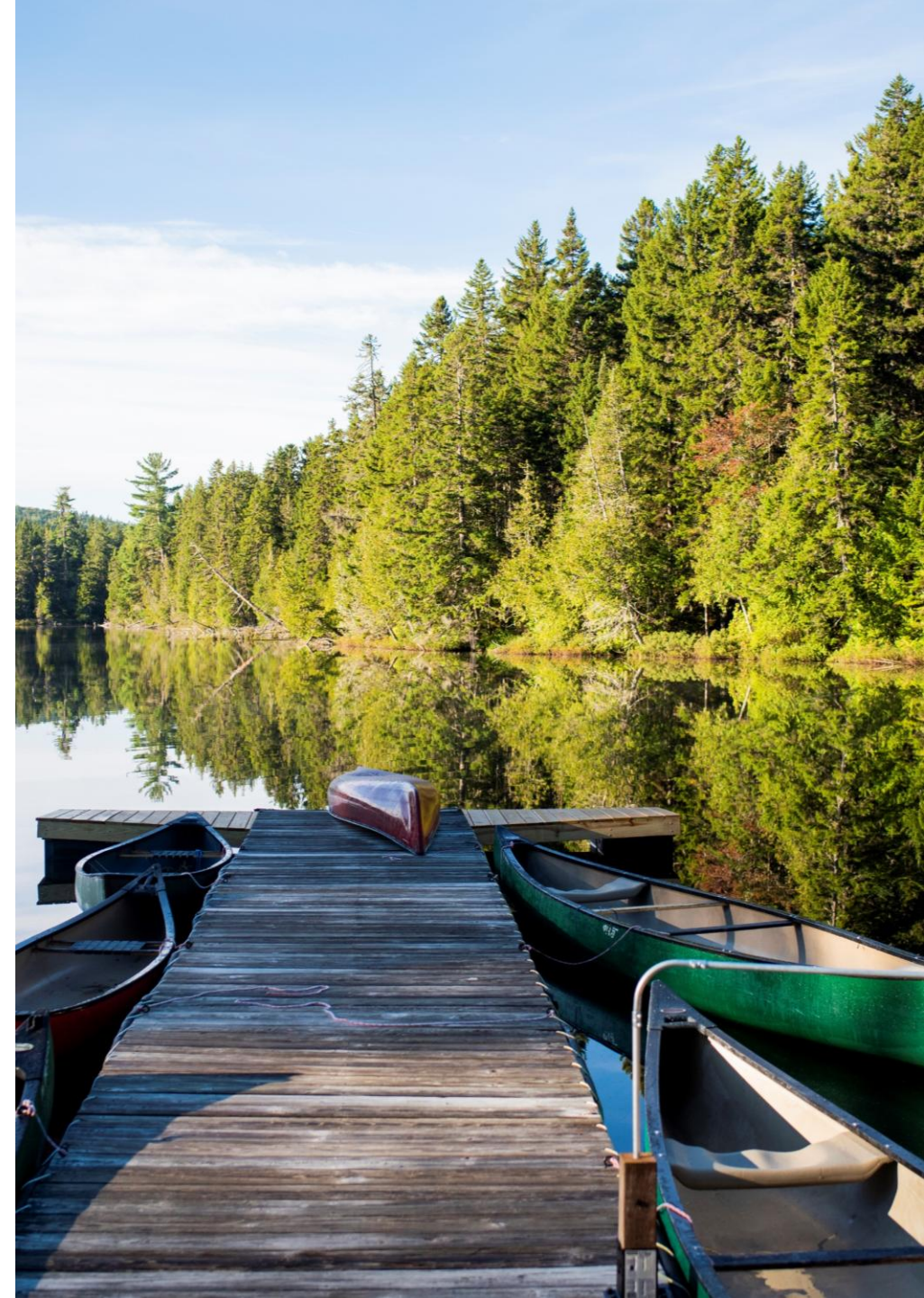
Stories from real workers and the beauty of Maine were the most compelling. Expand on this by highlighting diverse roles, regions, and career paths.

3. Support Relocation Pathways

With nearly half willing to move for a job, MOT should explore relocation support programs, assimilation initiatives, and year-round job connectors.

4. Clarify Career Pathways

Many respondents, particularly those unfamiliar with Maine, do not know what career options exist. Visibility into industry roles, growth paths, and employer expectations is essential.

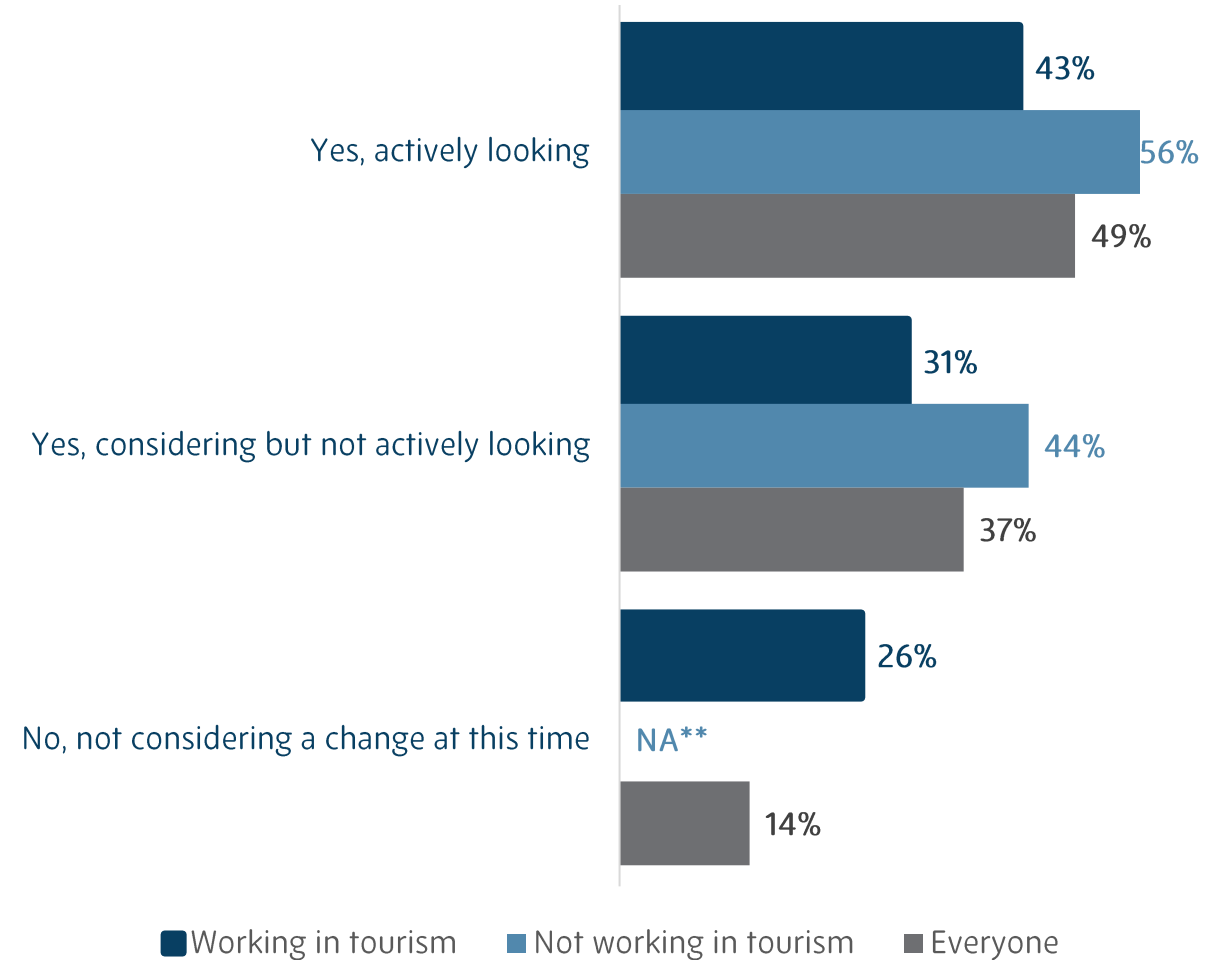


DETAILED FINDINGS



INDUSTRY CHANGE ASPIRATIONS*

- » Almost **half** of all respondents are **actively looking** to change job industries
- » Over **2 in 5** respondents currently working in the tourism industry are actively looking to change industries
 - » This highlights the importance of retention and showcasing the available career paths in the industry
 - » However, over **1 in 4** are not considering a change in industry at this time
- » **34%** of all respondents are **considering** changing industries

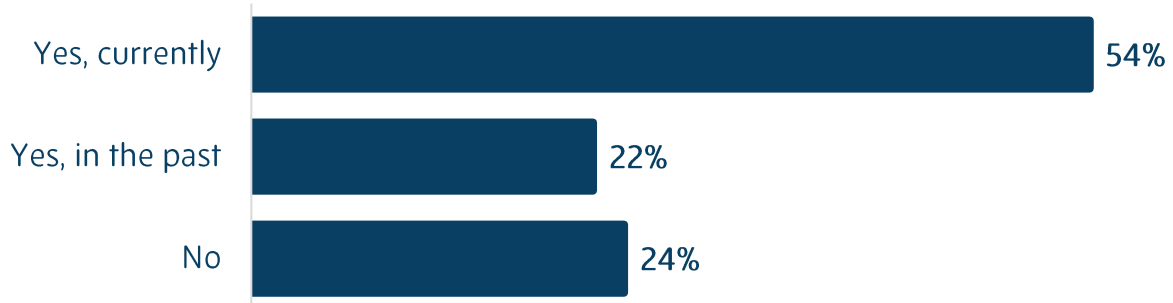


*Are you currently considering a change in your industry?

**Option 3 ("No, not considering a change at this time") was a disqualifier for respondents outside the tourism industry, as their lack of interest in switching into tourism meant their data was not included for this study.

TOURISM INDUSTRY FAMILIARITY

Have you ever worked in the tourism or hospitality industry?



» 54% of respondents **currently** work in the tourism industry, while 22% have worked in the **past**

Do you have friends or family who work in the tourism/hospitality industry?

» 57% of participants have **friends or family members** who work in the tourism and hospitality industry



MAINE TOURISM FAMILIARITY

Have you ever visited or lived in Maine?



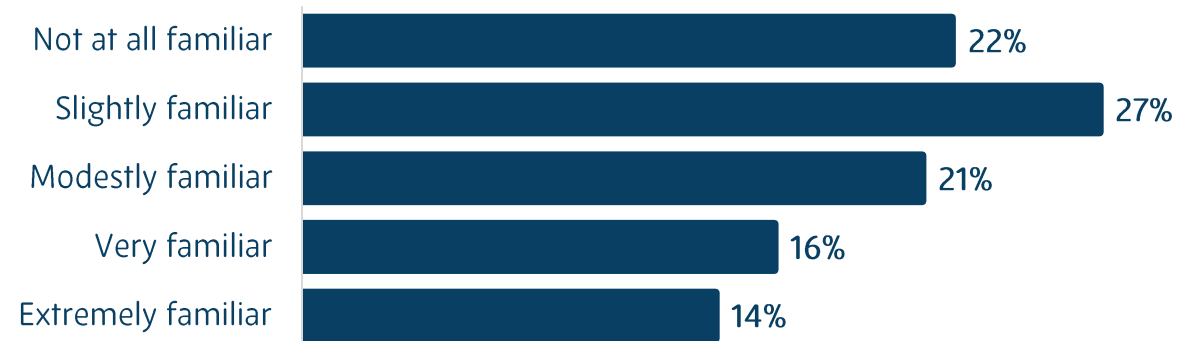
» 49% of respondents have **visited** Maine before, while 13% have also **previously lived** in the state

» 38% have **never visited or lived** in the state

How familiar are you with the tourism and hospitality industry in Maine?

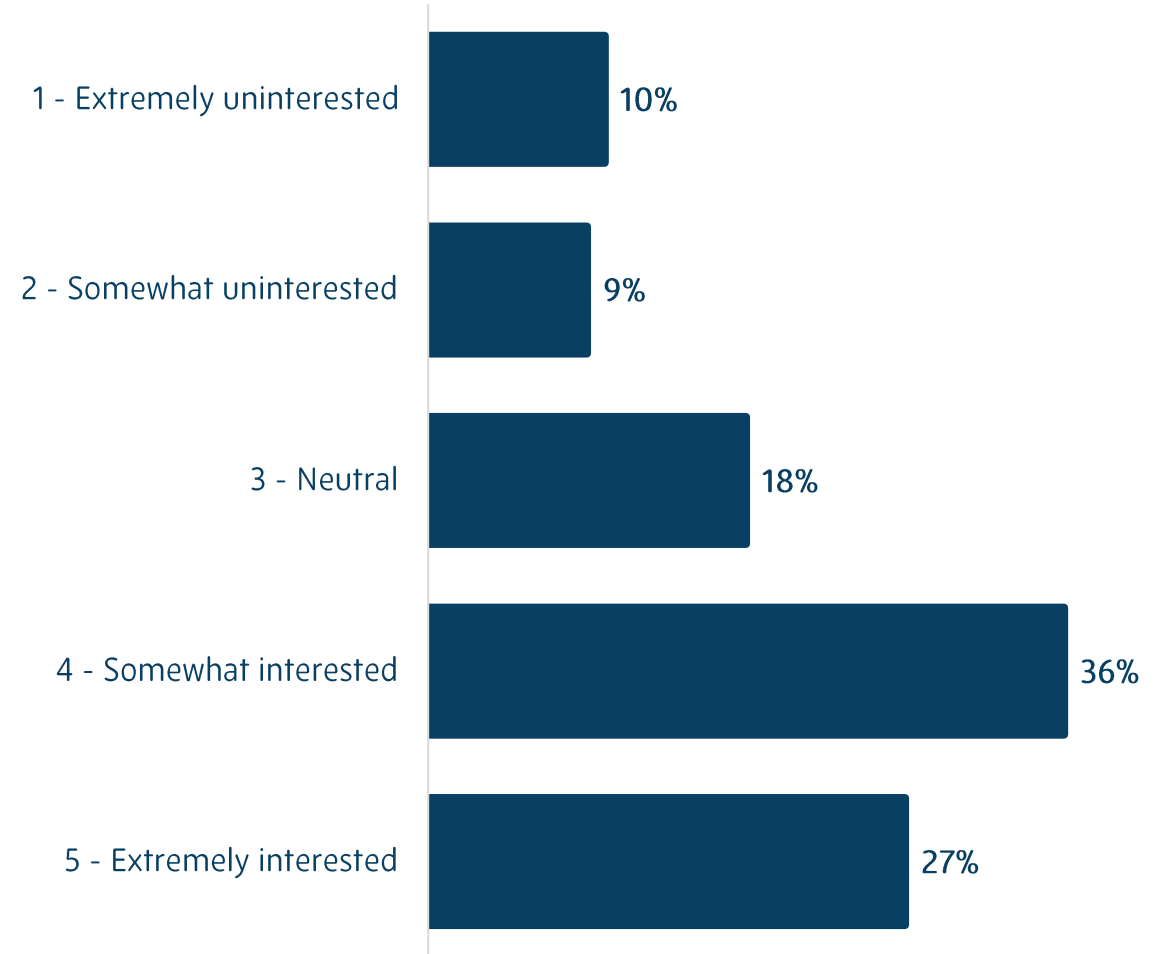
» 49% of respondents are **not at all familiar or slightly familiar** with the tourism and hospitality industry in Maine

» 30% are **very or extremely familiar** with the tourism and hospitality industry in the state



INTEREST IN WORKING IN MAINE*

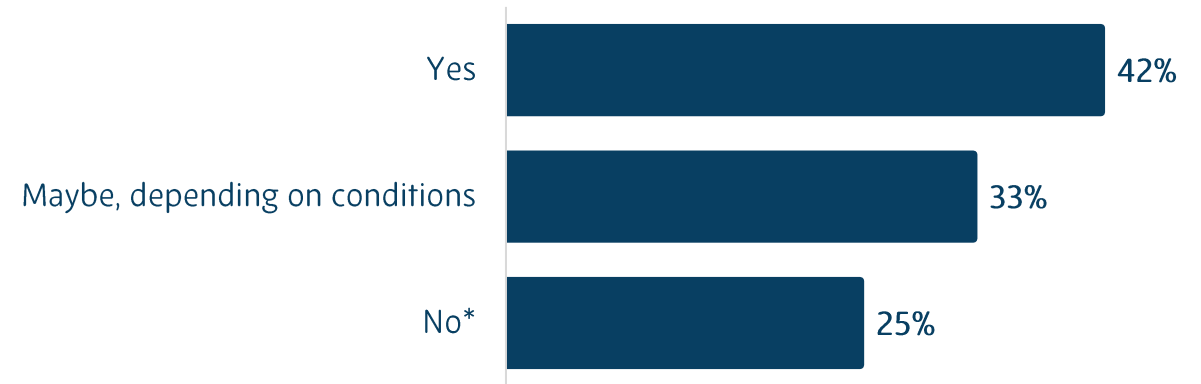
- » Around **63%** are **somewhat or extremely interested** in working in tourism and hospitality in Maine
- » **19%** are extremely or somewhat uninterested
- » Those with the following attributes showed the highest baseline interest in working in tourism and hospitality in Maine:
 - » Ages 25-54, particularly 35-54
 - » Have children
 - » HHI \$75K-\$100K
 - » Associates degree or higher, particularly those with a graduate or professional degree



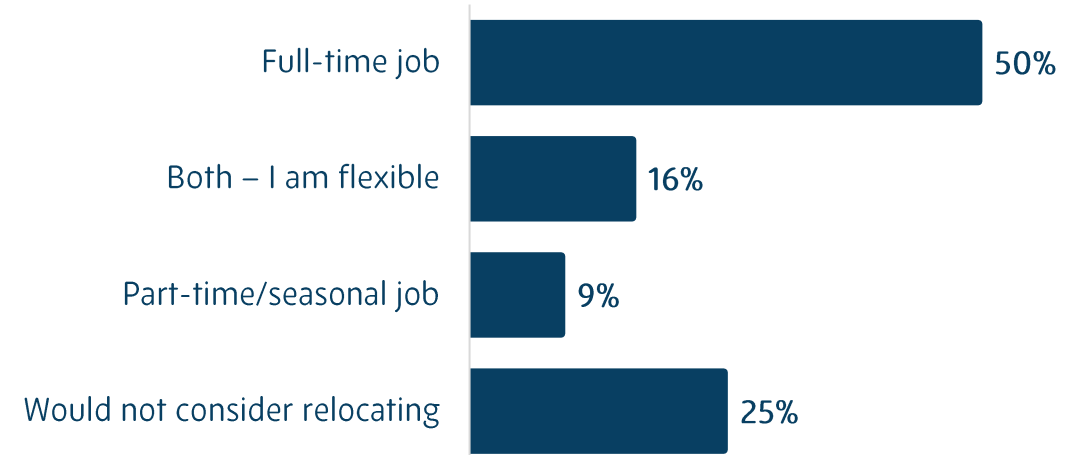
RELOCATION CONSIDERATIONS

- » 42% would consider relocating to Maine for a job in tourism or hospitality. 33% would consider depending on certain conditions (e.g., housing, pay, lifestyle)
- » If they were to relocate for a tourism or hospitality job, 50% would seek a full-time job, 9% would prefer a part-time or seasonal job, and 16% would consider both options
- » 25% would not consider relocating
- » Those with the following attributes showed the highest baseline willingness to relocate:
 - » Ages 25-54
 - » Have children
 - » HHI \$25K-\$50K and \$100K-\$150K
 - » Associates degree

Would you consider relocating to Maine for a job in tourism or hospitality?



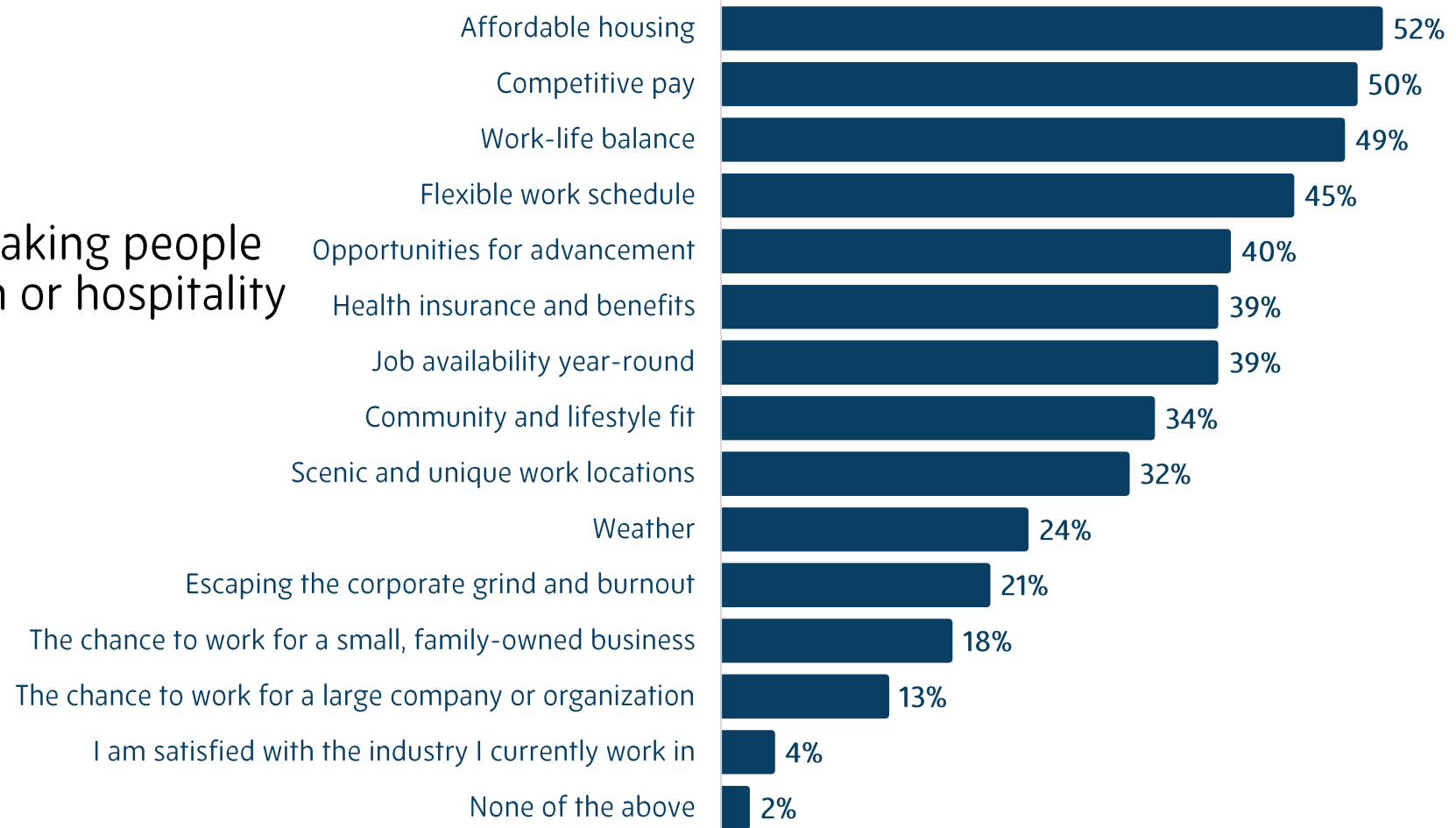
If you were to relocate to Maine for a job in tourism or hospitality, would you look for a



FACTORS FOR CONSIDERATION*

» The most important factors in making people more likely to consider a tourism or hospitality job in Maine were:

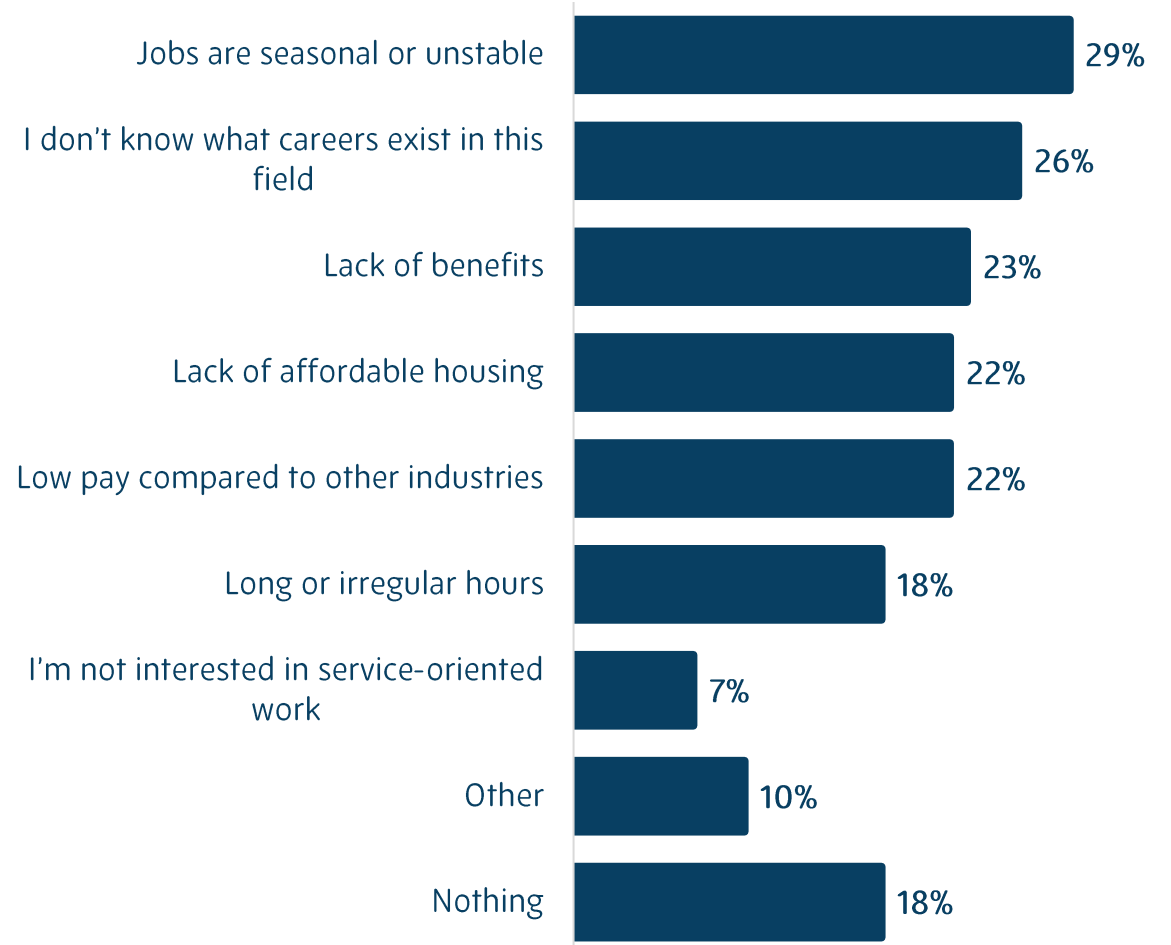
- » Affordable housing
- » Competitive pay
- » Work-life balance
- » Flexible work schedule



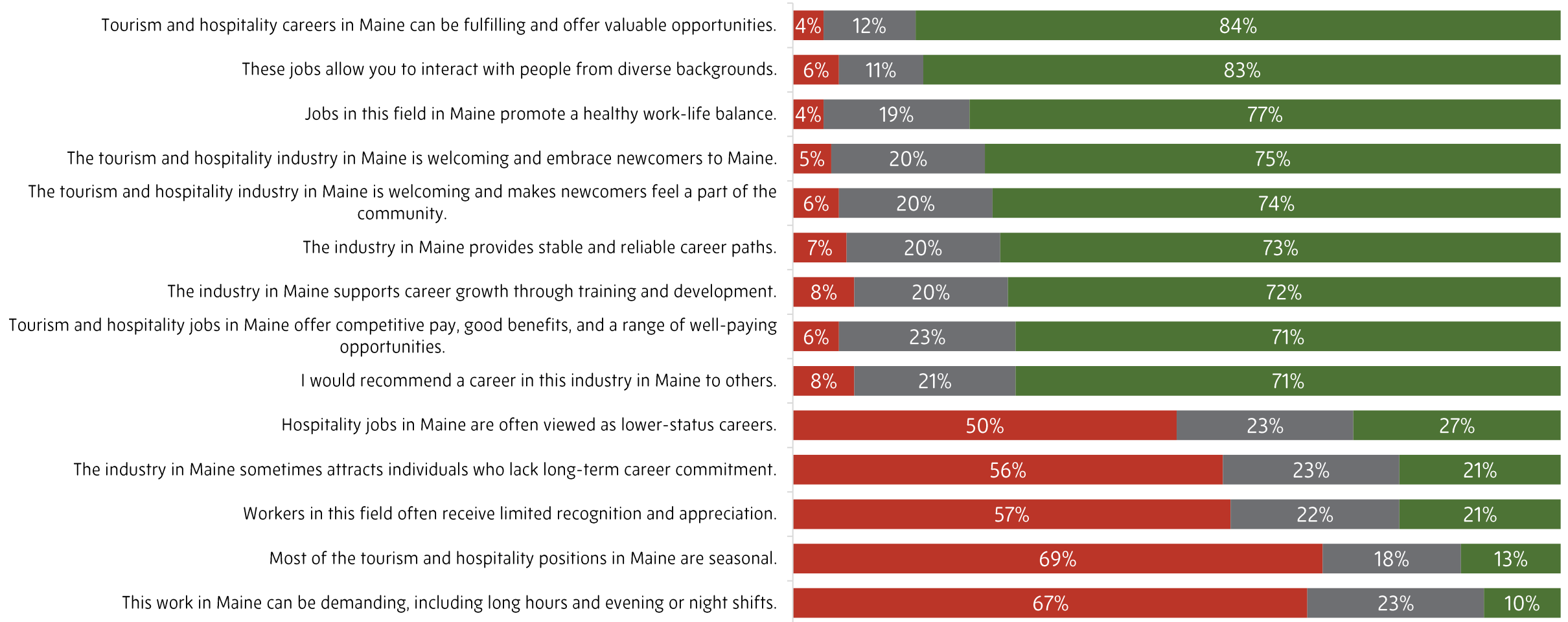
BARRIERS TO CONSIDERATION*

» The factors **preventing** respondents from considering a tourism and hospitality job in Maine are:

- » Job seasonality and instability
- » Lack of knowledge about career options
- » Lack of job benefits
- » Lack of affordable housing
- » Perception of low pay compared to other industries

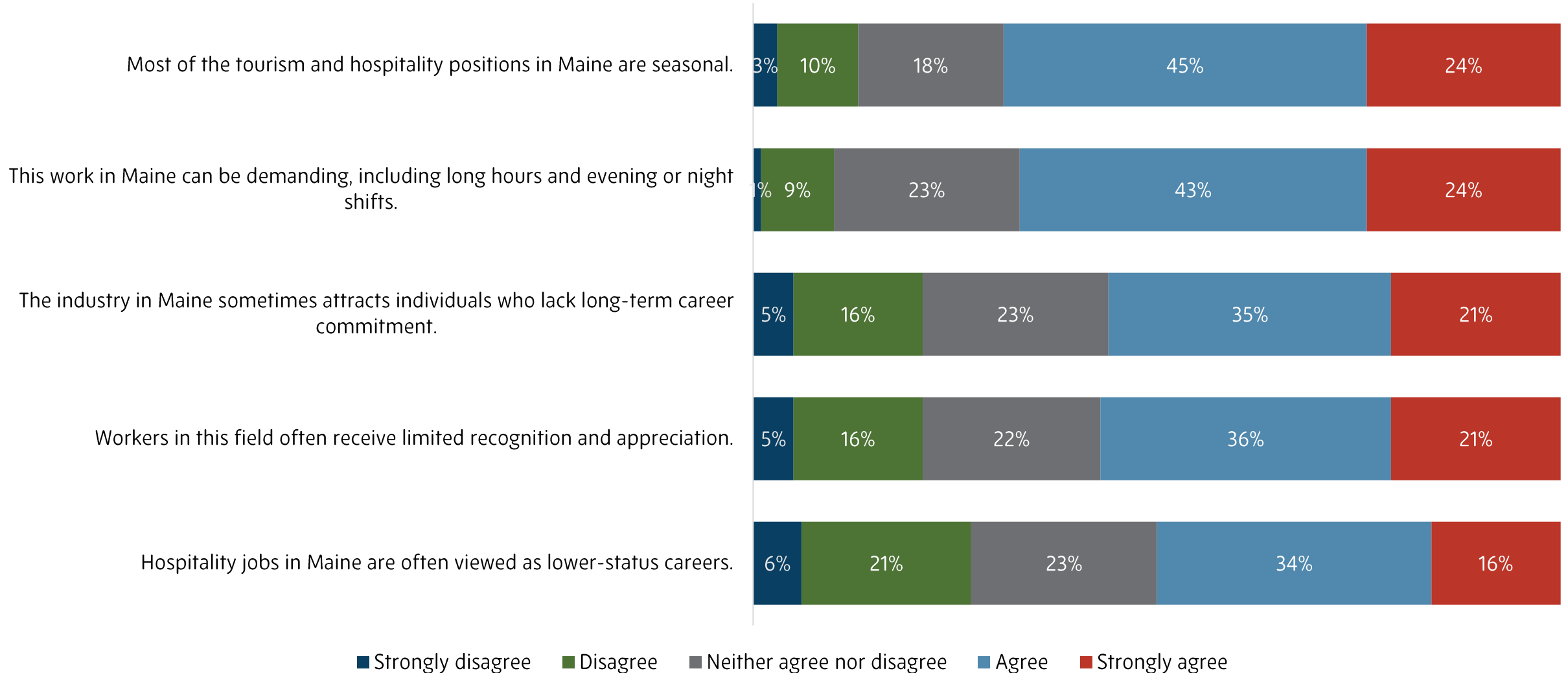


TOURISM/HOSPITALITY JOB PERCEPTIONS*



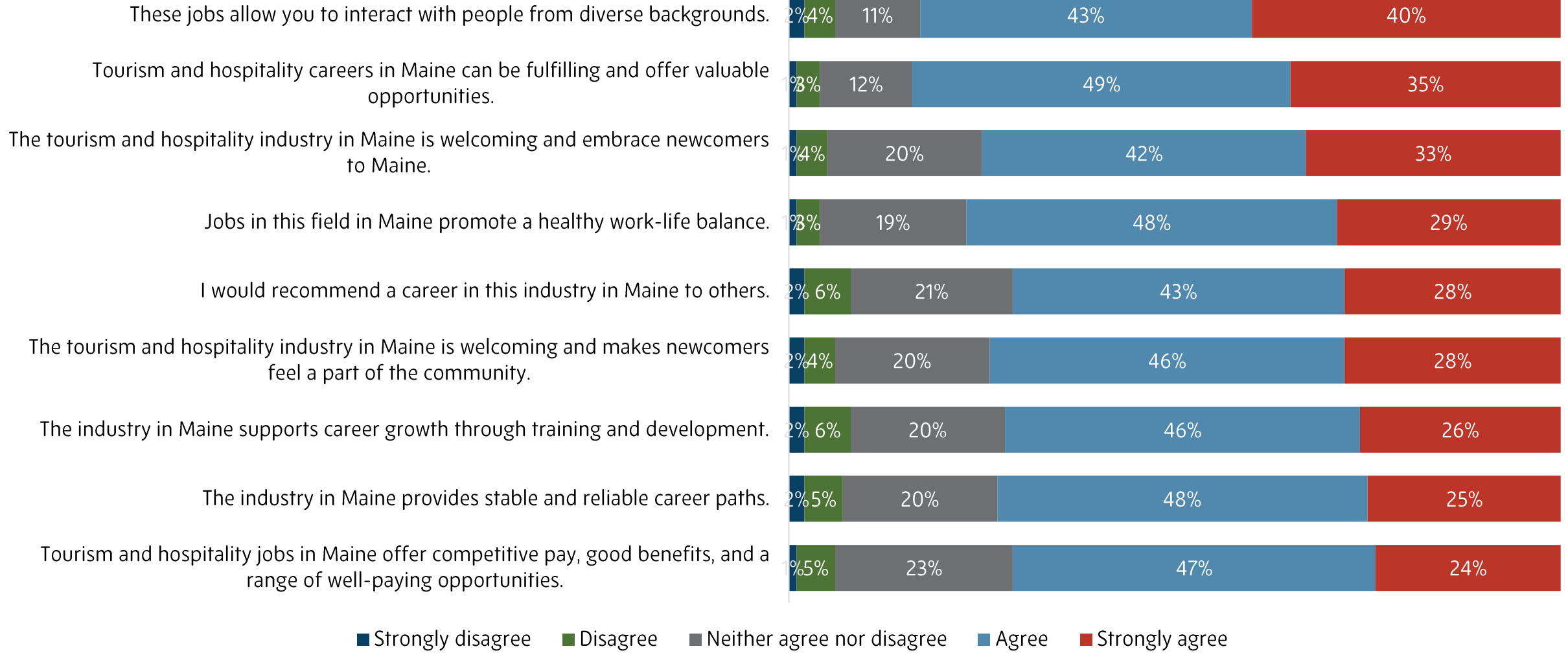
■ Negative sentiment ■ Neutral ■ Positive sentiment

NEGATIVE JOB PERCEPTIONS*



*For each of the following statements about the tourism and hospitality industry in Maine, please indicate if you strongly disagree, disagree, neither agree nor disagree, agree, strongly agree, or don't know.

POSITIVE JOB PERCEPTIONS*



*For each of the following statements about the tourism and hospitality industry in Maine, please indicate if you strongly disagree, disagree, neither agree nor disagree, agree, strongly agree, or don't know.

CAMPAIGN FEEDBACK



CAMPAIGN ASSETS

» Respondents were shown several assets from the campaign including static images and videos. These images and videos were randomized and showcased various sectors of the Tourism/Hospitality industry in Maine, including Accommodations, Food & Beverage, Outdoor Recreation, and Arts & Culture

FORGE YOUR NEW CAREER PATH IN MAINE



FORGE YOUR NEW CAREER PATH IN MAINE



FORGE YOUR NEW CAREER PATH IN MAINE

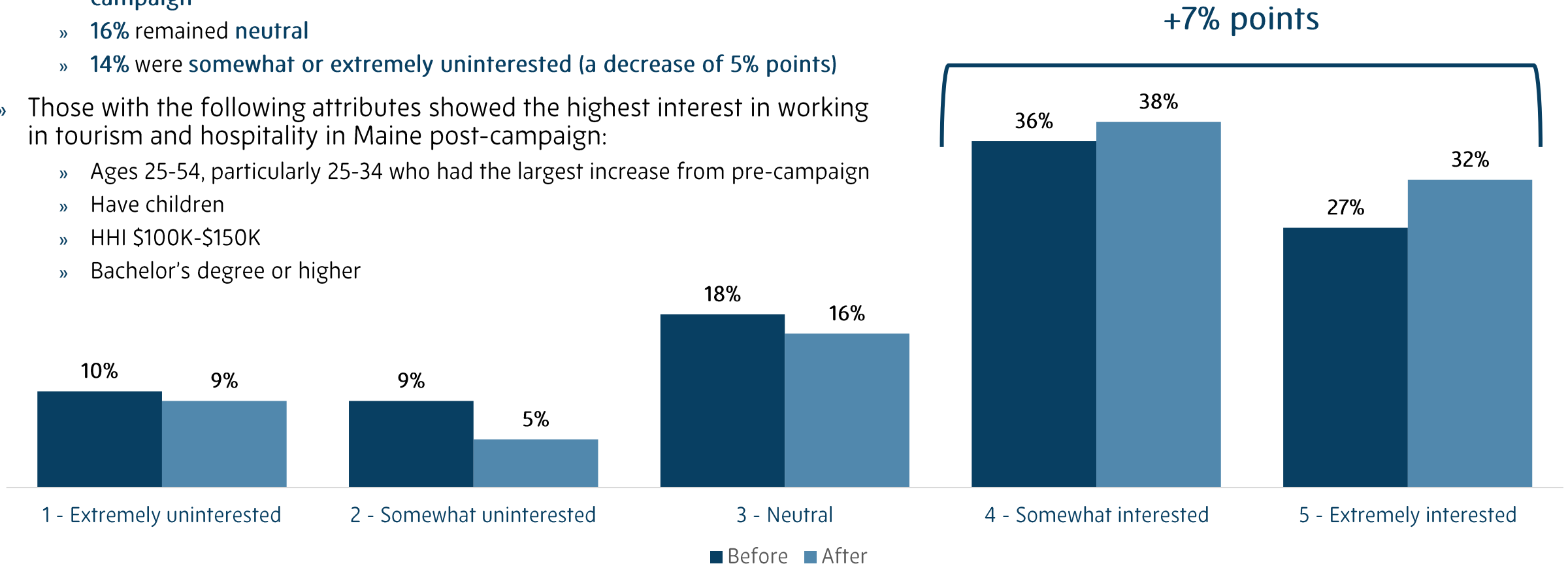


FORGE YOUR NEW CAREER PATH IN MAINE



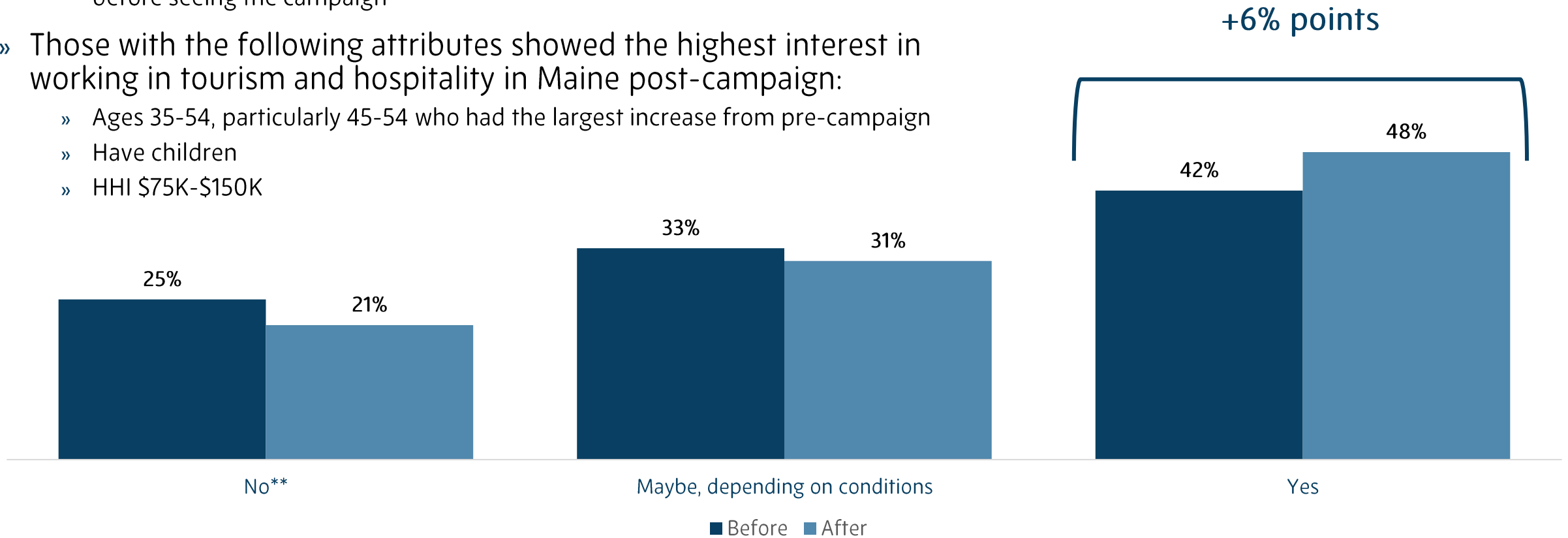
POST-CAMPAIGN INTEREST*

- » After viewing the campaign:
 - » 70% were **somewhat or extremely interested** in working in the tourism or hospitality industry in Maine – a **7% point increase from before seeing the campaign**
 - » 16% remained **neutral**
 - » 14% were **somewhat or extremely uninterested** (a decrease of 5% points)
- » Those with the following attributes showed the highest interest in working in tourism and hospitality in Maine post-campaign:
 - » Ages 25-54, particularly 25-34 who had the largest increase from pre-campaign
 - » Have children
 - » HHI \$100K-\$150K
 - » Bachelor's degree or higher



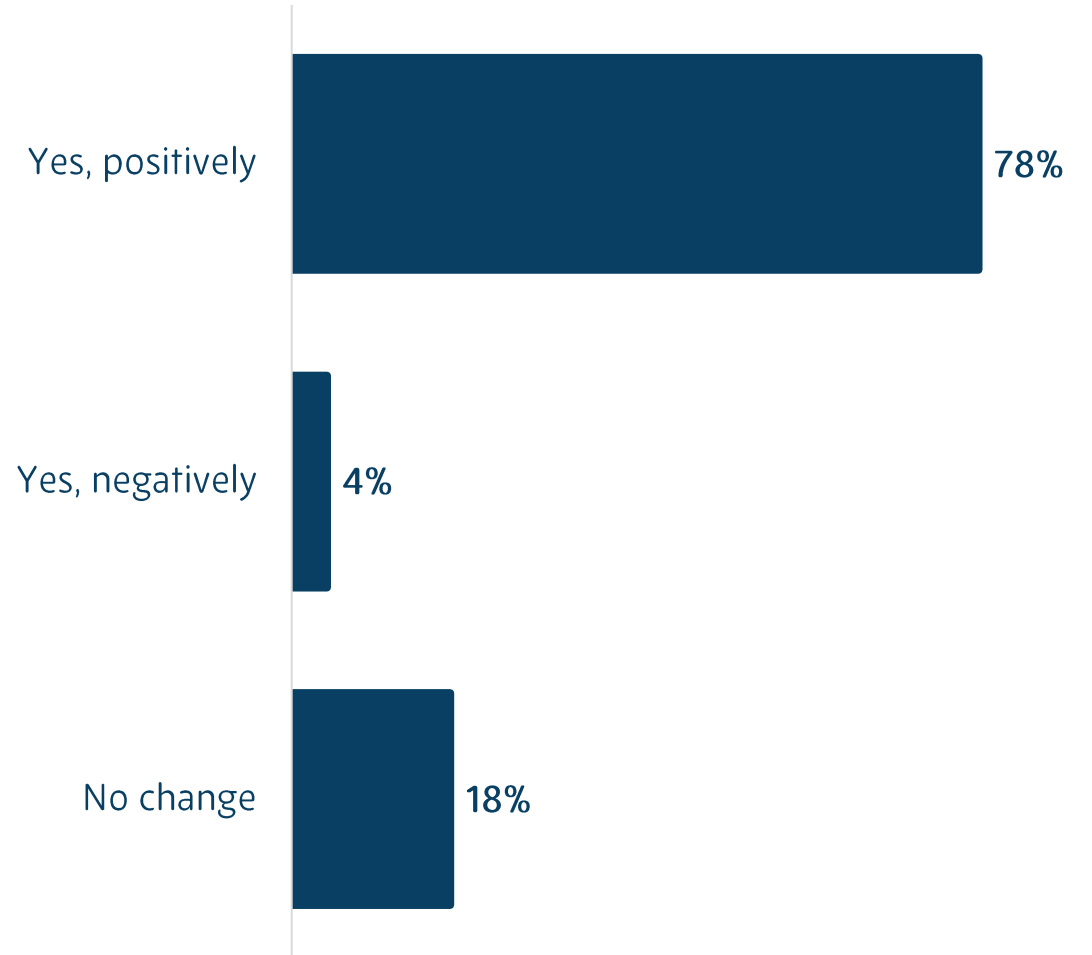
POST-CAMPAIGN RELOCATION CONSIDERATION*

- » After viewing the campaign:
 - » **48% would consider moving** to Maine for a tourism or hospitality job, **+6% points** from before seeing the campaign
- » Those with the following attributes showed the highest interest in working in tourism and hospitality in Maine post-campaign:
 - » Ages 35-54, particularly 45-54 who had the largest increase from pre-campaign
 - » Have children
 - » HHI \$75K-\$150K



CAMPAIGN PERCEPTION*

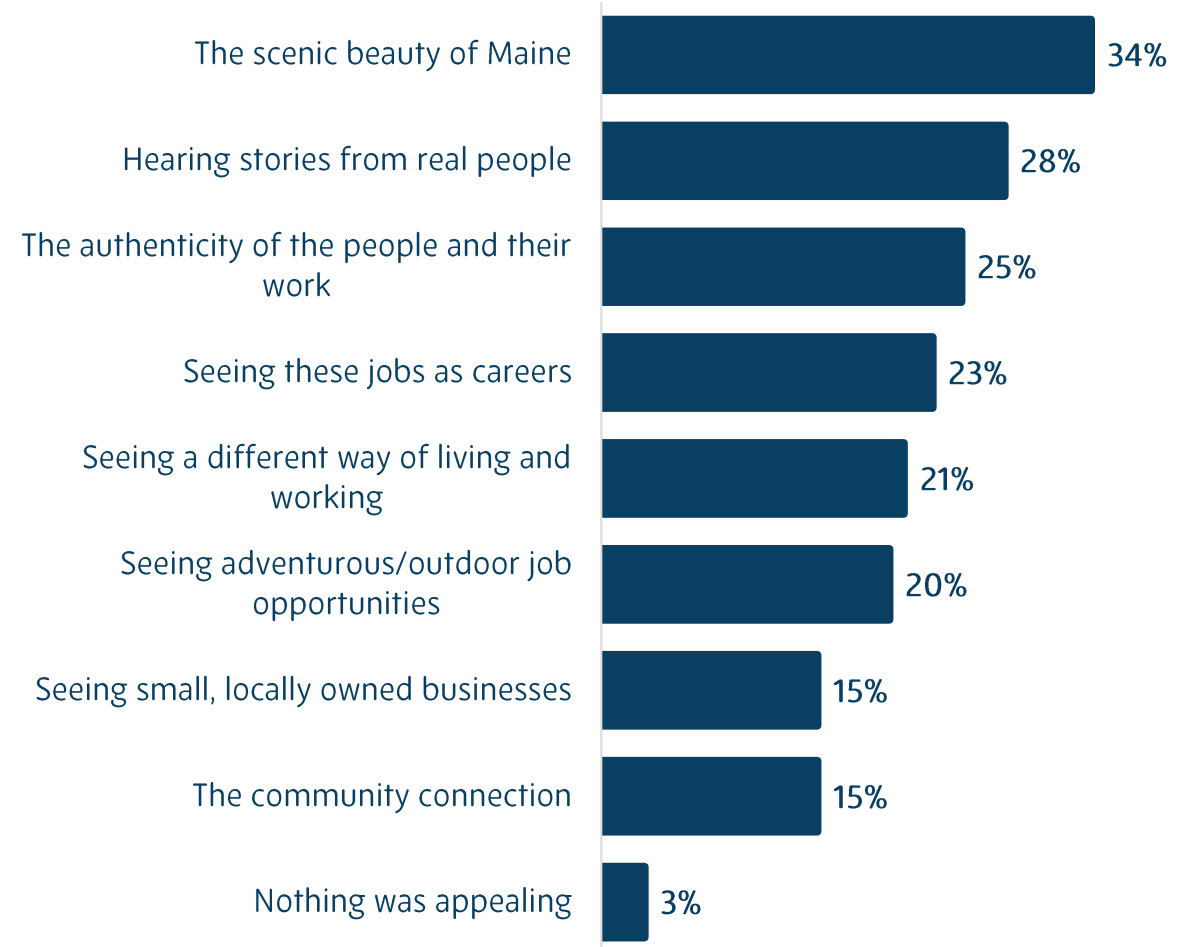
» 78% said the campaign positively influenced their perception of tourism and hospitality jobs in Maine



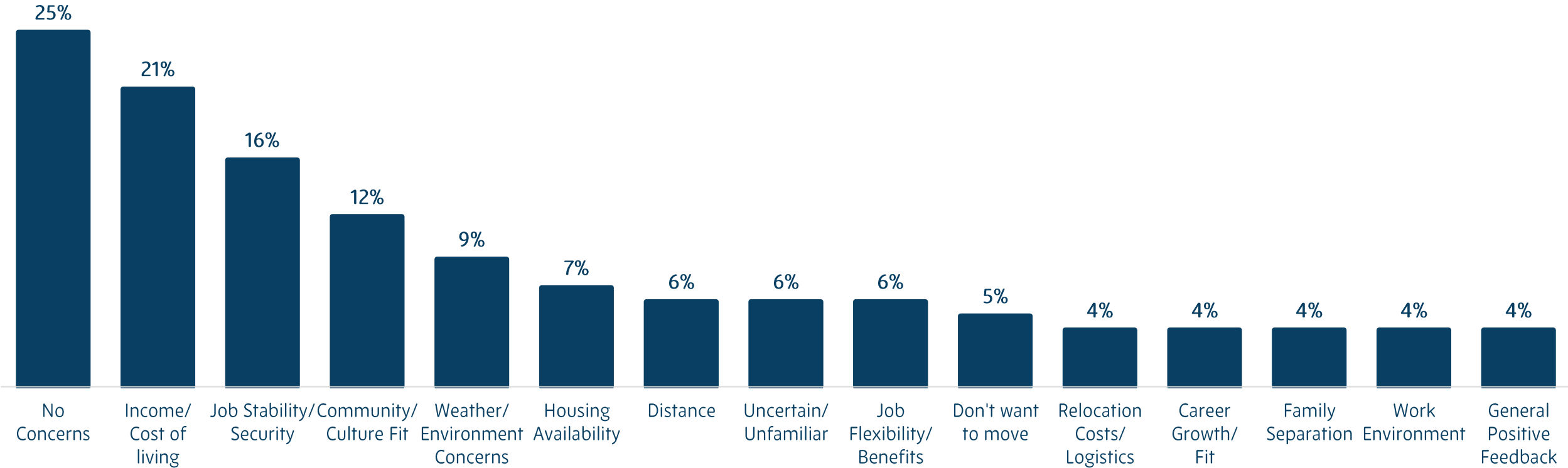
CAMPAIGN SELLING POINTS*

» The most appealing aspects of the campaign were:

- » The scenic beauty of Maine
- » Real people's stories
- » The authenticity of people and their work
- » Seeing these jobs as careers



CONCERNS ABOUT WORKING IN MAINE TOURISM*



*What concerns do you still have about working in Maine's tourism or hospitality industry?
Coded, open-ended responses.
Responses under 4% include: quality of life concerns, safety concerns, transportation issues, and general economic concerns.

Below is a breakdown of the coded themes and the descriptions for the open-ended responses in the previous slide

Theme	Description	
No Concerns	Encompasses responses where participants express a lack of apprehension or worry about working in Maine's tourism or hospitality industry. This includes statements of confidence in the industry, positive anticipation of the work environment, and satisfaction with the current understanding of the job prospects and lifestyle associated with the industry.	25%
Income/Cost of Living	Encompasses concerns about low wages, insufficient pay to cover basic living expenses, and the disparity in income between peak and off-peak seasons in Maine's tourism and hospitality industry. Respondents also expressed worries about whether salaries would meet their expectations and allow for a comfortable standard of living. Encompasses concerns about the high expenses associated with living in Maine, including worries about whether salaries can adequately cover basic living costs and necessities. Respondents frequently mentioned the financial pressure of living in tourist-heavy areas, the affordability of housing, and the overall impact of living costs on their ability to maintain a satisfactory quality of life.	21%
Job Stability/Security	Encompasses concerns about the instability and uncertainty of employment in Maine's tourism and hospitality industry due to its seasonal nature. Respondents expressed worries about the lack of year-round job opportunities, unpredictable work hours, and the challenges of maintaining a stable income during off-peak seasons. Encompasses concerns about the instability and unpredictability of employment in Maine's tourism and hospitality industry, including fears of layoffs, intense competition, and the potential for job displacement due to technological advancements. Respondents express anxiety over the lack of long-term job stability.	16%
Community/Culture Fit	Encompasses concerns related to individuals feeling out of place or not fitting in with the lifestyle or environment in Maine. Respondents expressed apprehensions about adapting to the local culture, climate, and social scene, as well as a preference for their current location and lifestyle, indicating a misalignment with the personal and social aspects of living and working in Maine. Encompasses concerns about the lack of diversity and inclusivity in Maine's neighborhoods, with respondents expressing apprehension about fitting in. Additionally, there are worries about the social dynamics, including the friendliness and acceptance of current residents, and the availability of activities for young people.	12%
Weather/Environment Concerns	Encompasses apprehensions about adapting to Maine's climate, particularly the cold weather and long winters, which are perceived as potential obstacles to work and personal well-being. Respondents also express worries about extreme weather events disrupting economic activities and the impact of seasonal weather changes on income stability. Encompasses concerns regarding the tourism industry's effect on the environment, including issues related to improper handling of tourist waste and its potential to exacerbate environmental degradation. Respondents also highlighted the impact of climate and seasonal fluctuations on the industry, emphasizing the need for sustainable development practices.	9%
Housing Availability	Encompasses concerns regarding the difficulty in finding affordable housing and the scarcity of housing options for workers in Maine's tourism and hospitality industry. Respondents highlighted challenges related to securing satisfactory living conditions, particularly in popular tourist areas, and expressed a need for more information on housing solutions.	7%
Distance	Encompasses concerns about the geographical remoteness of Maine from respondents' current locations, including the challenges posed by relocating far from home, family, and familiar urban environments. Respondents frequently mention the significant distance as a barrier, highlighting the potential cultural shift and isolation from sophisticated urban settings.	6%
Uncertainty and Unfamiliarity	Encompasses concerns related to moving to an unknown area, including apprehensions about adapting to a new environment, making new friends, and understanding local values and culture. Respondents also expressed worries about the lack of knowledge regarding Maine, the challenges of navigating a new community, and the fear of the unknown aspects of relocation.	6%

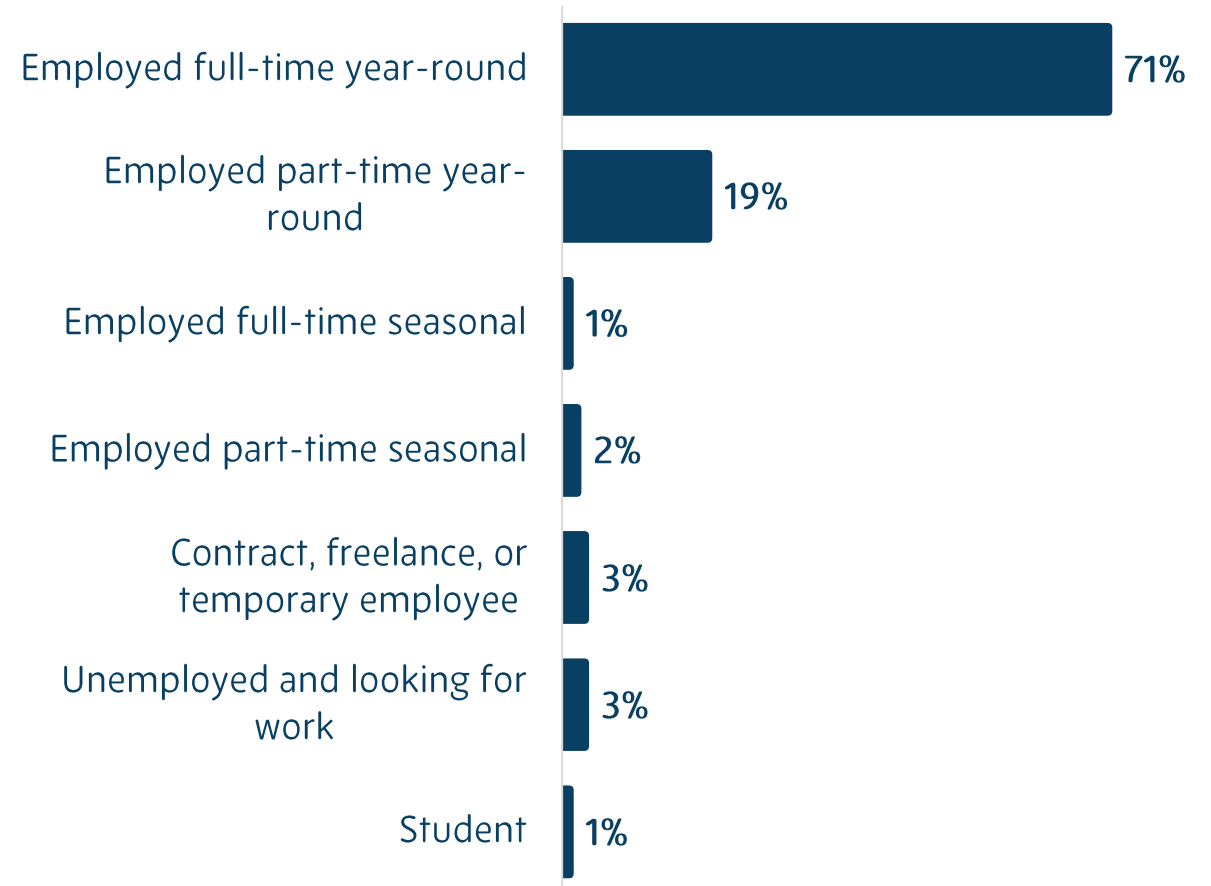
Theme	Description	
Job Flexibility/Benefits	Encompasses concerns regarding the inflexibility of work schedules, the need for flexible hours to accommodate personal and family time, and the demanding nature of long hours during peak seasons in Maine's tourism and hospitality industry. Respondents expressed apprehension about the ability to maintain a balanced work-life schedule and adapt to the intense work hours, highlighting the importance of flexible work options. Encompasses concerns regarding the sufficiency of benefits compared to current employment, and the overall quality of health insurance and other employee benefits in Maine's tourism and hospitality industry. Respondents also express apprehension about the flexibility of benefits and the potential lack of secure job benefits.	6%
Do Not Want To Move	Encompasses respondents' reluctance to relocate from their current residences, citing a strong attachment to their home states. Additionally, it includes sentiments of comfort and satisfaction with their current living situations, as well as a lack of interest in moving to Maine for employment opportunities.	5%
Relocation: Costs, Logistics	Encompasses concerns related to the financial burden of moving, including the affordability of relocation, the availability of relocation stipends, and the logistical challenges associated with moving, such as sourcing supplies and managing transportation. Respondents also expressed worries about the time and effort required for relocation, highlighting the need for financial support to facilitate the process.	4%
Career Growth Opportunities/Fit	Encompasses concerns about limited career development and advancement opportunities within Maine's tourism and hospitality industry. Respondents highlighted issues such as insufficient training resources, niche market limitations, and the impact of intense competition on personal development. Encompasses respondents' concerns about aligning their personal interests and career aspirations with job opportunities in Maine's tourism and hospitality industry. This includes considerations about how well they would fit into the industry and whether their preferred job conditions, such as live on-site positions, are available.	4%
Family Separation	Encompasses concerns related to the emotional and logistical challenges of being distanced from family members due to relocation for work in Maine's tourism or hospitality industry. Respondents expressed worries about the impact of moving far from loved ones, including difficulties in maintaining family connections and the potential strain of caring for elderly relatives from afar.	4%
Work Environment	Encompasses concerns related to the physical and emotional demands of jobs in Maine's tourism and hospitality industry, including worries about high work intensity, poor relationships with colleagues, and the impact of large business volumes on service quality. Respondents also expressed anxiety about dealing with customer complaints, the need for additional training, and the challenges posed by peak tourist seasons.	4%
Positive Feedback	Encompasses respondents' expressions of enthusiasm and appreciation for the opportunity to work in Maine's tourism and hospitality industry. This includes sentiments of excitement, willingness to embrace challenges, and admiration for the industry, highlighting a strong interest and positive outlook towards potential employment in this sector.	4%
Quality Of Life Concerns	Encompasses apprehensions about the overall living conditions and lifestyle in Maine, particularly in relation to the adequacy of salary to support a desired standard of living. Respondents expressed unease about the potential impact of working in the tourism and hospitality industry on their quality of life, including worries about being disconnected from urban environments and the ability to achieve a comfortable life for themselves and their families.	3%
Safety Concerns	Encompasses apprehensions about personal security and health risks in Maine's tourism and hospitality industry. Respondents also expressed worries about workplace safety.	2%
Transportation Issues	Encompasses concerns about the convenience and adequacy of transportation systems in Maine, including traffic conditions and the availability of train or subway services. Respondents highlighted the impact of transportation on their tourism-related work, indicating that current systems may not meet their needs effectively.	2%
General Economy Concerns	Encompasses apprehensions regarding the unstable economy and its impact on the tourism industry in Maine, including economic fluctuations that may lead to decreased travel and industry instability. Respondents also express worries about how economic downturns and extreme weather events can disrupt economic flow and necessitate costly repairs.	1%

RESPONDENT PROFILE



CURRENT EMPLOYMENT STATUS*

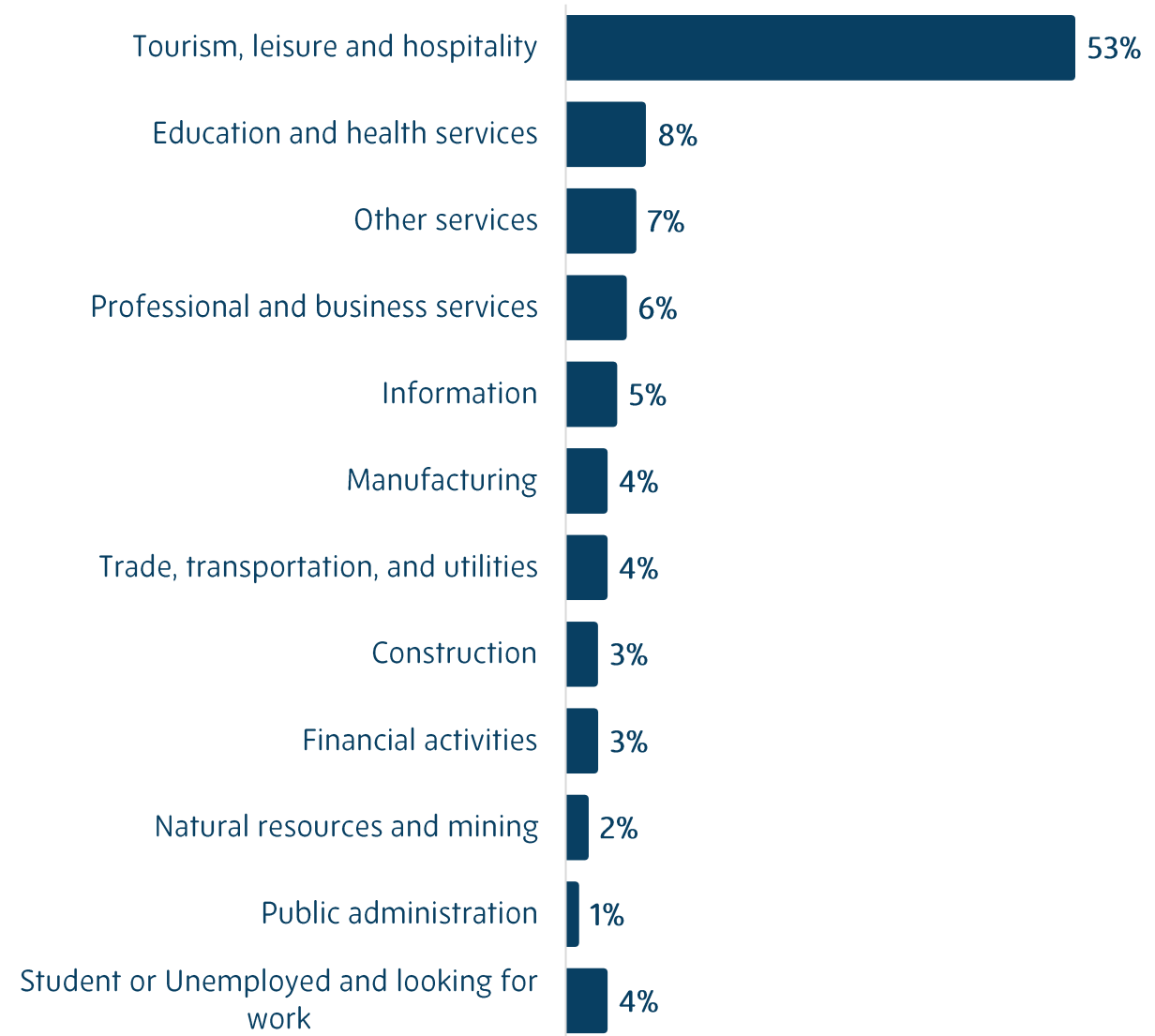
- » 71% are currently employed full time year-round and 19% are employed part time year-round
- » 6% are employed seasonally or temporarily
- » 4% of participants were students or unemployed and looking for work



CURRENT INDUSTRY WORKING IN*

» 53% of participants currently work in **Tourism, Leisure and Hospitality**

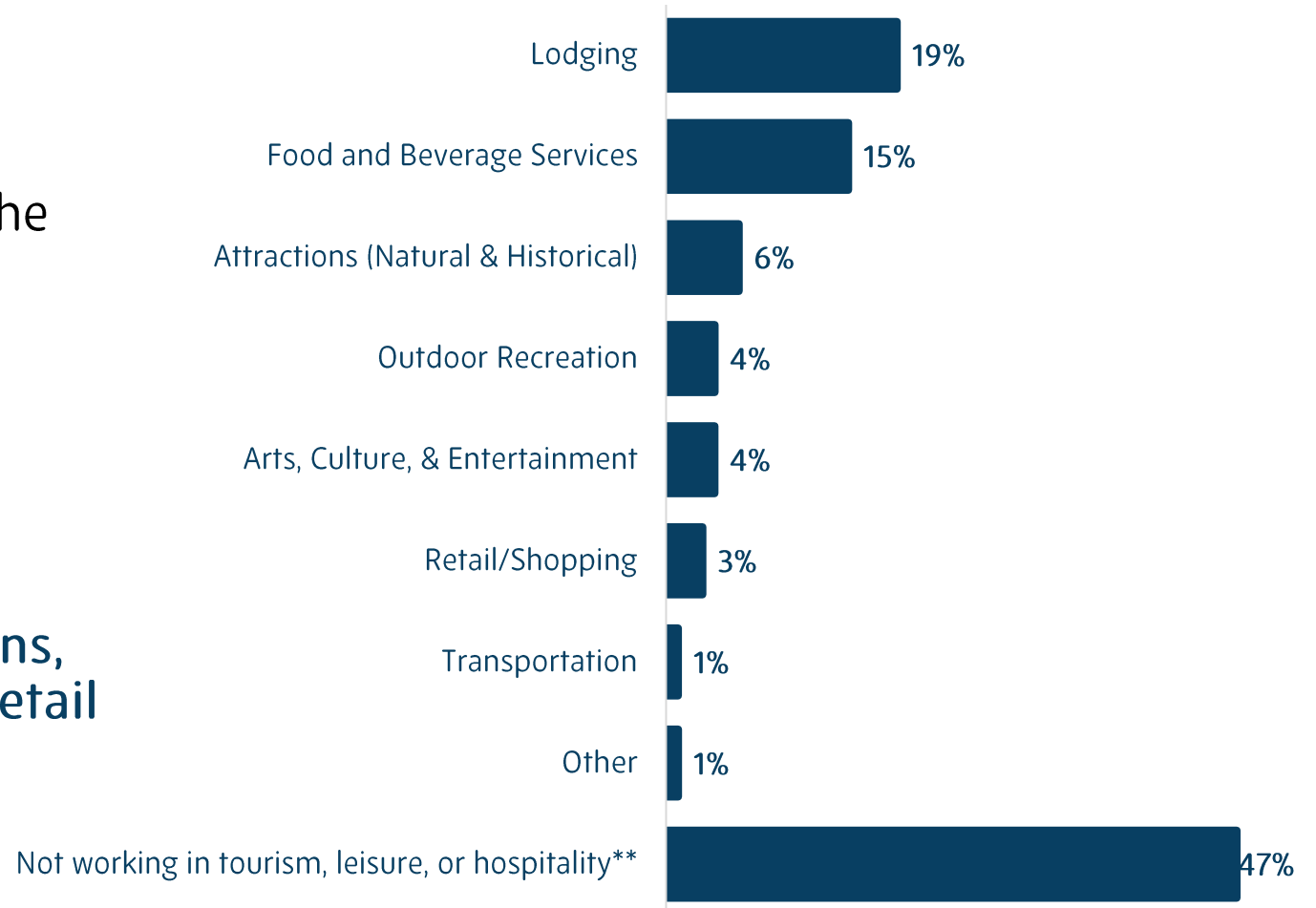
» Other popular industries are **Education and health services, Other services, Professional and Business Services and Information**



*What best describes the industry you currently work in?
Students and those who are not currently working but are looking for work have previously worked or would consider working in Tourism, Leisure and Hospitality; and Education Services

CURRENT TOURISM INDUSTRY SECTOR*

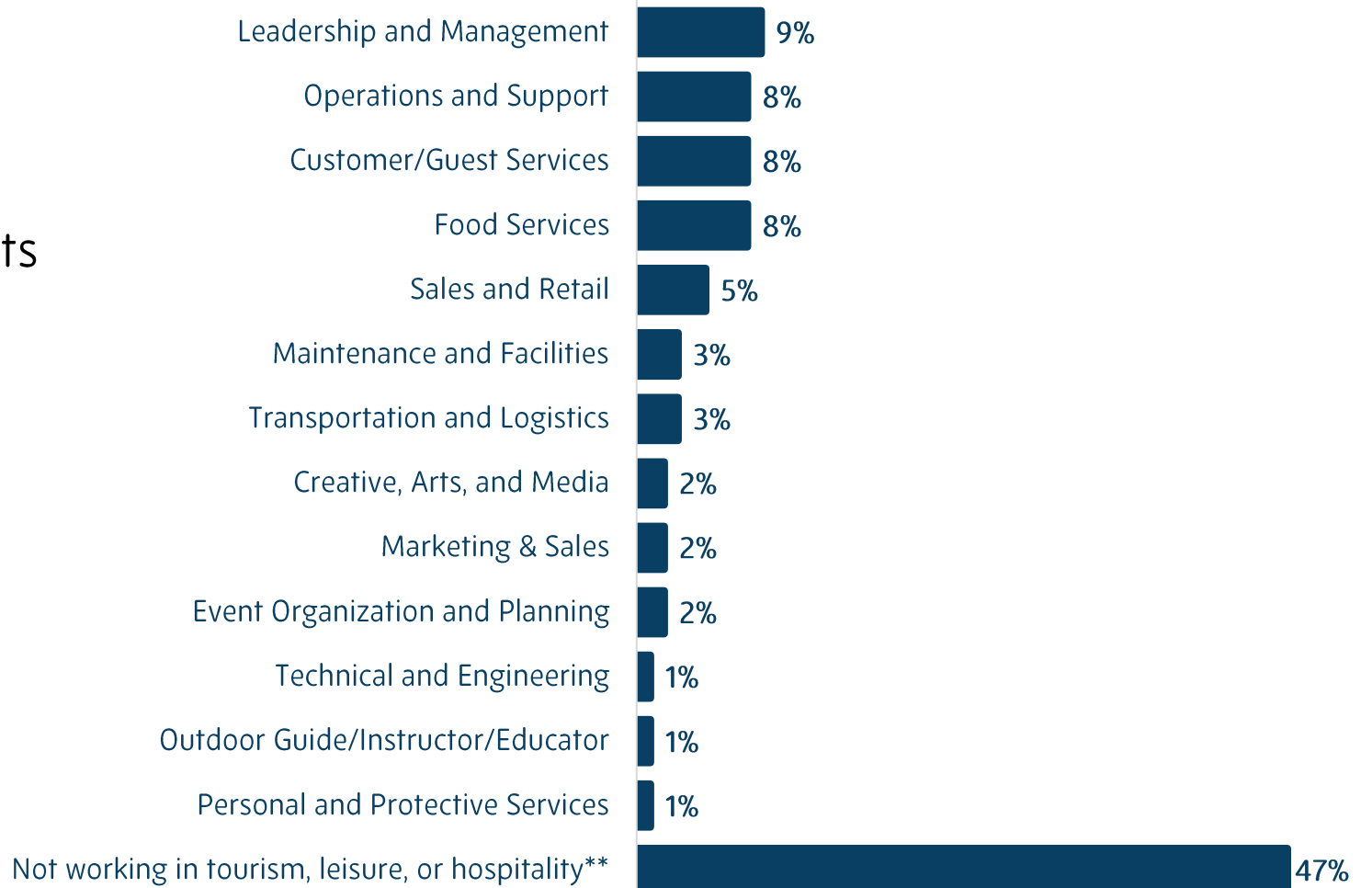
- » 19% of respondents who currently work in the tourism industry work in **Lodging**
- » 15% currently work in **Food and Beverage Services**
- » Other popular tourism sectors are **Attractions, Outdoor Recreation, Arts & Culture, and Retail**



ROLE TYPE IN TOURISM INDUSTRY*

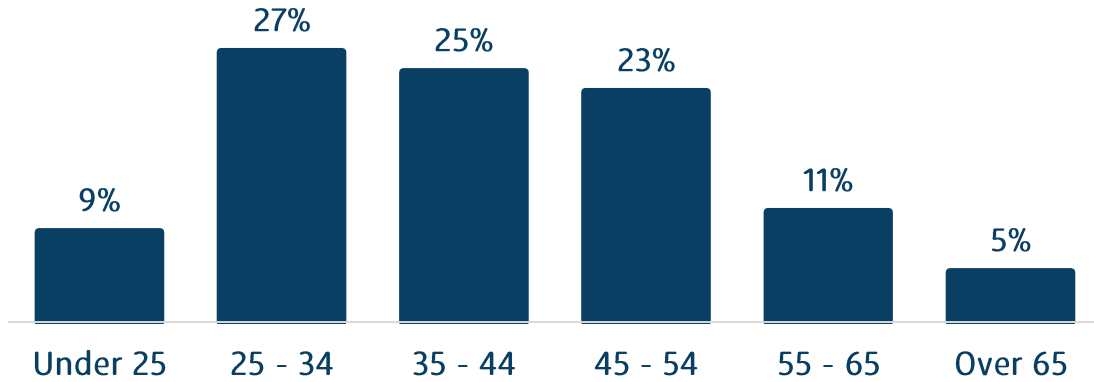
» The top 5 tourism roles that participants worked in are:

- » Leadership and Management
- » Operations and Support
- » Customer/Guest Services
- » Food Services

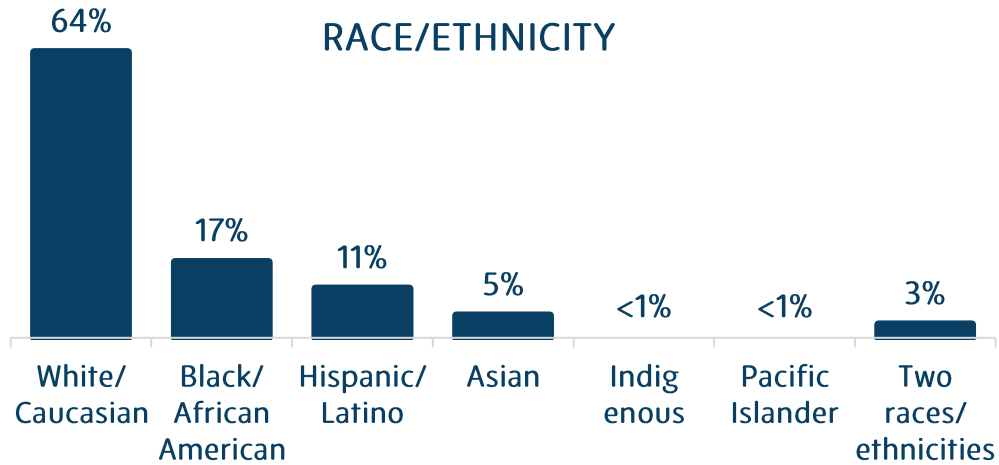


DEMOGRAPHICS

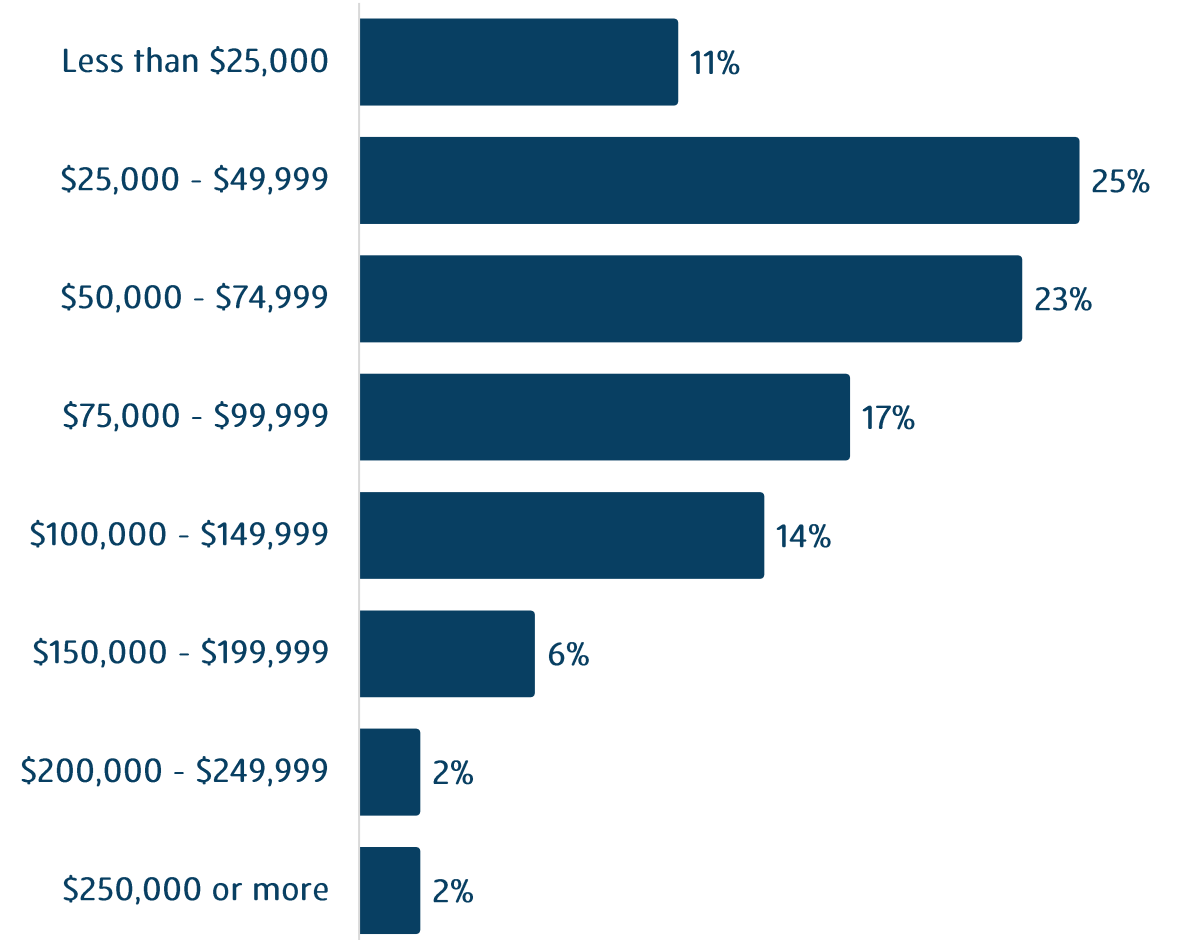
AGE



RACE/ETHNICITY

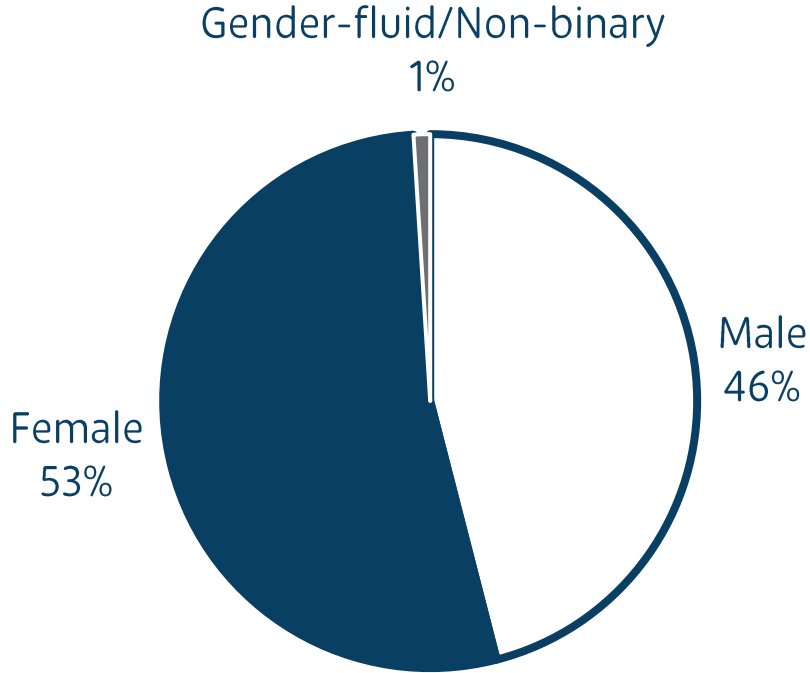


INCOME

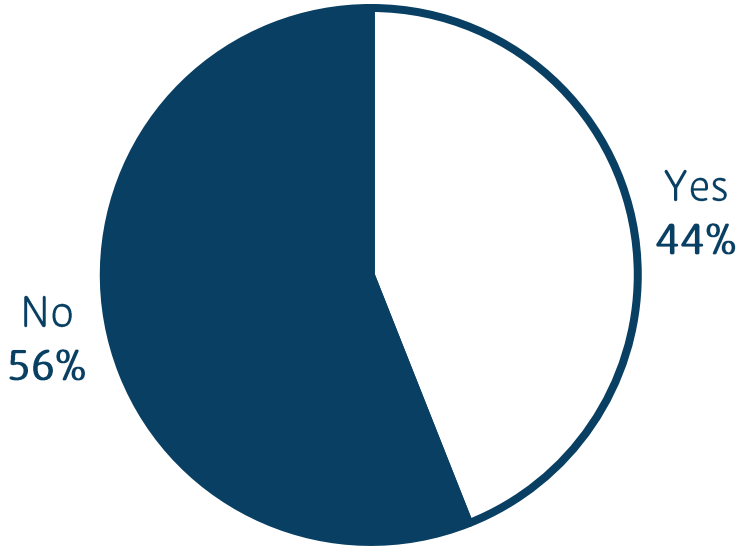


DEMOGRAPHICS

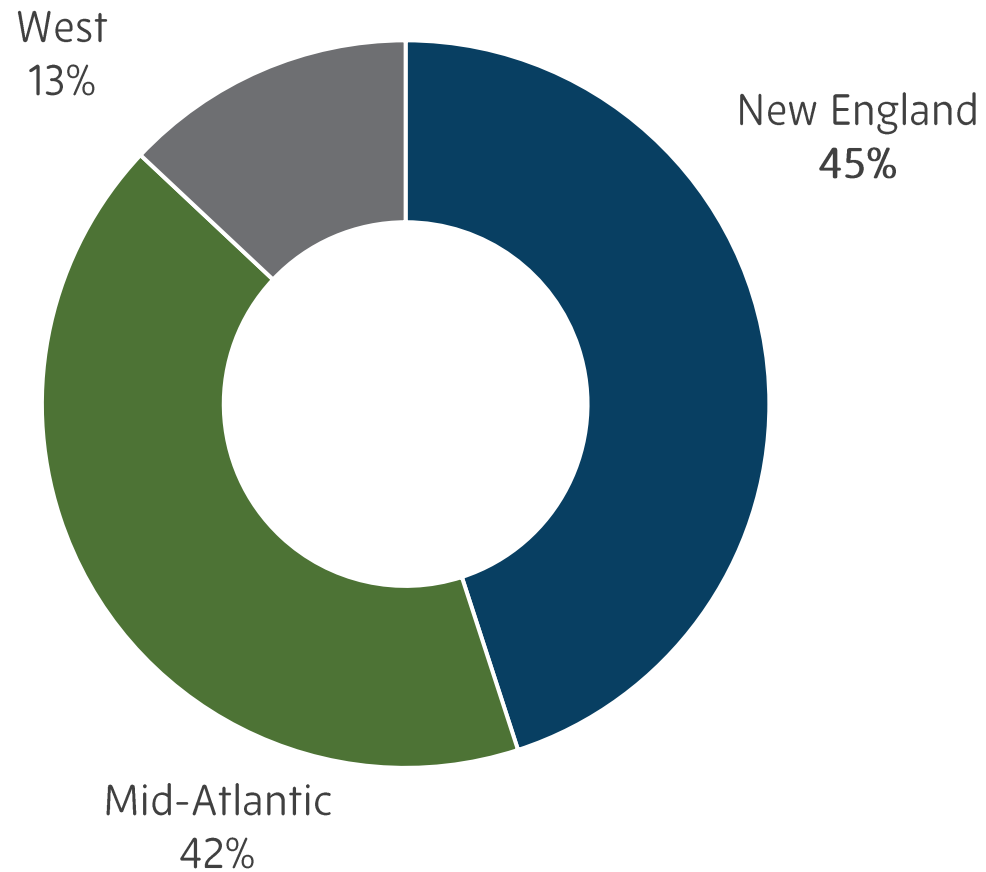
GENDER



CHILDREN AT HOME



REGIONS/STATE



MAINE OFFICE OF TOURISM

2025 Workforce Potential Employee Study

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