

# New Hampshire Economic Conditions

June 2012

## A First Look: New Hampshire Employment Projections, 2010 – 2020

The Economic and Labor Market Information Bureau has recently completed New Hampshire industrial and occupational employment projections for 2010 – 2020. Over the ten-year period, employment in the state is expected to grow by 10.4 percent, an average of one percent per year. The 2010 estimated employment of 662,146 is projected to grow to 730,710 by 2020. Service-providing industries will continue to dominate New Hampshire's economic landscape, but positive growth is expected for Goods-producing industries as well.

Specific assumptions made in projecting employment through 2020:

- By 2020, the U.S. will have a full employment economy (an unemployment rate of 5.2 percent).
- The population growth rate from 2010 through 2020 in New Hampshire will be less than that of the U.S.
- It is assumed that there will be no major change in state or federal government policy.

No assumptions are made about business cycle fluctuations, natural disasters, or other catastrophic events. Projections should be used as a baseline and are not intended to be a precise estimate.

### Contents

#### Seasonally Adjusted Estimates

#### Unemployment Rates. . . . . 5

Current Employment Statistics. . . . . 5

#### Not Seasonally Adjusted Estimates

Unemployment Rates. . . . . 6

Current Employment Statistics. . . . . 8

Claims Activity . . . . . 9

Visit our Web site:  
[www.nhes.nh.gov/elmi](http://www.nhes.nh.gov/elmi)

### New Hampshire Long-term Projections by Industry, 2010-2020

NAICS Code	Industry	Employment			Percent Change	Percent of 2010 Employment	Percent of 2020 Employment
		2010	2020	Change			
	Total Employment	662,146	730,710	68,564	10.4%	100.0%	100.0%
101	Goods-Producing Industries	93,589	99,279	5,690	6.1%	14.1%	13.6%
11	Agriculture, Forestry, Fishing and Hunting	5,912	6,046	134	2.3%	0.9%	0.8%
21	Mining	491	486	-5	-1.0%	0.1%	0.1%
23	Construction	21,418	26,750	5,332	24.9%	3.2%	3.7%
31-33	Manufacturing	65,768	65,997	229	0.3%	9.9%	9.0%
102	Service-Providing Industries	518,025	578,728	60,703	11.7%	78.2%	79.2%
22	Utilities	2,514	2,352	-162	-6.4%	0.4%	0.3%
42	Wholesale Trade	25,923	29,534	3,611	13.9%	3.9%	4.0%
44-45	Retail Trade	92,331	98,817	6,486	7.0%	13.9%	13.5%
48-49	Transportation and Warehousing	15,340	16,317	977	6.4%	2.3%	2.2%
51	Information	11,475	12,564	1,089	9.5%	1.7%	1.7%
52	Finance and Insurance	27,308	29,532	2,224	8.1%	4.1%	4.0%
53	Real Estate and Rental and Leasing	6,714	7,665	951	14.2%	1.0%	1.0%
54	Professional, Scientific, and Technical Services	28,850	35,633	6,783	23.5%	4.4%	4.9%
55	Management of Companies and Enterprises	8,075	8,454	379	4.7%	1.2%	1.2%
56	Administrative and Support and Waste Management Services	27,230	31,881	4,651	17.1%	4.1%	4.4%
61	Educational Services	62,617	67,149	4,532	7.2%	9.5%	9.2%
62	Health Care and Social Assistance	84,292	104,636	20,344	24.1%	12.7%	14.3%
71	Arts, Entertainment, and Recreation	10,980	12,333	1,353	12.3%	1.7%	1.7%
72	Accommodation and Food Services	51,363	54,980	3,617	7.0%	7.8%	7.5%
81	Other Services (Except Government)	23,352	25,494	2,142	9.2%	3.5%	3.5%
	Government	39,661	41,387	1,726	4.4%	6.0%	5.7%
	Self-employed and Unpaid Family Workers	50,532	52,703	2,171	4.3%	7.6%	7.2%

## Industry Projections Highlights

- Service-providing industries will continue to dominate New Hampshire's business places. About 88.5 percent of total employment growth will be in services, while just over eight percent will be in goods-producing industries.
- A resurgence in *Construction* employment is expected, growing at 24.9 percent, just beating out *Health care and social services* at 24.1 percent over ten years
- *Manufacturing* is projected to gain employment for the first time since the 1998 – 2008 projections. The *Manufacturing* subsectors expected to see some growth through 2020 are:
  - ⇒ Food
  - ⇒ Wood Product
  - ⇒ Chemical
  - ⇒ Plastics and Rubber Product
  - ⇒ Nonmetallic Mineral Product
  - ⇒ Machinery
  - ⇒ Fabricated Metal Product
  - ⇒ Electrical Equipment, Appliance, and Component
- The only goods-producing sector not growing is *Mining*, which will remain essentially flat.
- *Health care and social services* is expected to account for about 30 percent of total employment growth over the period. *Ambulatory health care services, Nursing and residential care facilities, and Social assistance* are all expected to see about 30 percent growth through 2020.
- The nearest competitor to *Health care and social assistance* is *Professional, Scientific, and Technical Services*, which is expected to account for about 10 percent of total employment growth. This sector will be led by *Computer system design and related services, Management, scientific, and technical consulting services, Advertising and related services, and Archi-*

## Education and Training Classification Changes

With the release of the 2010 to 2020 projections, the Bureau of Labor Statistics introduced a new system for identifying the educational and training requirements for each of the 749 occupations. The expanded classifications provide a more complete picture of the path a worker must take to gain competency in a specific occupation.

Each occupation is classified by requirements in three categories: Education, Work Experience, and Job Training. The first two categories identify education and training before an individual is employed, while the last category refers to training received after employment.

### Educational Requirements

Similar to the previous method of identifying education and training requirements, this category describes the typical level of education most workers need for an entry-level position in the occupation. The eight educational levels are:

- Doctoral (PhD) or professional degree (i.e., MD, DD, JD, DC)
- Master's degree (i.e., MA, MS, MEd)
- Bachelor's degree (i.e., BS, BA, BFA)
- Associate's degree (i.e., AS, AA)
- Postsecondary non-degree award (program completion, i.e., CNA, cosmetologist)
- Some college, no degree
- High school diploma or equivalent (GED)
- Less than high school

### Work Experience

Some occupations require related work experience as an entry-level qualification. Frequently, these occupations are first-line supervisory positions, where the worker performs the same job tasks as the workers under their supervision, such as retail supervisors, marketing managers, or construction managers. Non-supervisory workers may also have an experience requirement, such as restaurant cooks and industrial truck and tractor operators. The five work experience requirement levels are less than one year, one to five years, more than five years, or none.

### Job Training

This category identifies any additional training or preparation typically needed to gain competency in the occupation once the worker is employed. This type of training is occupation-specific, not job-specific, meaning skills can be transferred to another job in the same occupation. The six job training categories are internships or residencies, apprenticeships, long-term on-the-job training, moderate-term on-the-job training, short-term on-the-job training, or none.

### New Hampshire Long-term Projections by Occupation, 2010-2020

SOC Code	Occupation Title	Employment			Percent Change	Average Annual		
		2010	2020	Change		Growth	Replacements	Total
00-0000	Total, All Occupations	662,146	730,710	68,564	10.35%	7,109	15,650	22,759
11-0000	Management Occupations	48,040	51,049	3,009	6.26%	313	1,025	1,338
13-0000	Business and Financial Operations Occupations	28,847	32,798	3,951	13.70%	399	590	989
15-0000	Computer and Mathematical Occupations	18,616	22,321	3,705	19.90%	373	319	692
17-0000	Architecture and Engineering Occupations	12,248	13,146	898	7.33%	91	277	368
19-0000	Life, Physical, and Social Science Occupations	4,333	4,951	618	14.26%	58	128	186
21-0000	Community and Social Services Occupations	9,351	11,257	1,906	20.38%	190	198	388
25-0000	Education, Training, and Library Occupations	45,028	48,779	3,751	8.33%	377	994	1,371
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	8,946	9,808	862	9.64%	91	239	330
29-0000	Healthcare Practitioners and Technical Occupations	38,177	45,935	7,758	20.32%	773	759	1,532
31-0000	Healthcare Support Occupations	18,706	23,079	4,373	23.38%	438	270	708
33-0000	Protective Service Occupations	11,222	12,190	968	8.63%	96	302	398
35-0000	Food Preparation and Serving Related Occupations	52,612	56,609	3,997	7.60%	415	1,881	2,296
37-0000	Building and Grounds Cleaning and Maintenance Occupations	24,213	26,303	2,090	8.63%	211	429	640
39-0000	Personal Care and Service Occupations	22,314	27,230	4,916	22.03%	490	507	997
41-0000	Sales and Related Occupations	85,618	93,072	7,454	8.71%	750	2,681	3,431
43-0000	Office and Administrative Support Occupations	104,785	111,333	6,548	6.25%	802	2,276	3,078
45-0000	Farming, Fishing, and Forestry Occupations	2,290	2,313	23	1.00%	5	67	72
47-0000	Construction and Extraction Occupations	23,064	27,016	3,952	17.13%	394	513	907
49-0000	Installation, Maintenance, and Repair Occupations	25,057	27,782	2,725	10.88%	275	565	840
51-0000	Production Occupations	42,788	44,134	1,346	3.15%	194	817	1,011
53-0000	Transportation and Material Moving Occupations	31,833	35,268	3,435	10.79%	346	742	1,088

ecture, engineering, and related services. About 85 percent of employment gain in the sector will be in these four industry groups.

- *Educational services* is projected to gain about 4,500 employees, but the rate of growth will be just over seven percent.
- Only the *Utilities* sector is projected to see an employment decline, dropping by 6.4 percent. This sector represents less than half of one percent of total employment, both in the 2010 estimated and 2020 projected totals.

### Occupational Projections Highlights

- Replacements will continue to dominate employment opportunities, with about two-thirds of average annual openings coming from replacement needs.
- Employment in occupations providing personally-delivered services is projected to grow the fastest. Workers in these occupations commonly have human-to-human contact in their daily work. *Community and social services* occupations, *Healthcare practitioners and technical occupations*,

*Healthcare support* occupations, and *Personal care and service* occupations are expected to lead the pack in growth through 2020.

- *Computer and mathematical* occupations, *Healthcare practitioners and technical* occupations, and *Healthcare support* occupations are each expected to have more annual openings from new job openings than from replacements by a small margin.
- Growth openings are expected to substantially exceed replacement openings for both *Personal and home care aides* and *Home health aides*.

- Aging baby boomers will have an impact as they leave the labor force. This is exemplified in occupational groups that are expected to have 75 percent or more of annual job openings from replacements, including:
  - Management
  - Architecture and engineering
  - Protective services
  - Food preparation and related
- Sales and related
- Farming, fishing, and forestry
- Production
- Paralleling the positive employment change for Manufacturing, workers in Production occupations are expected to see a little over three percent growth through 2020. Over 80 percent of average annual openings are expected to be due to replacements.
- Postal service mail sorters, processors, and processing machine operators; Stock clerks and order fillers; and Postal clerks are projected to lose the most workers over the next ten years.

*Michael Argiropolis*

### Behind the Projections

- New Hampshire utilizes a national standard software system, developed by a consortium of states working in cooperation with the Employment and Training Administration of the U.S. Department of Labor. The system provides the capability to project employment using accepted statistical methods.
- Projections begin with historical time series data for more than 100 industries from the Quarterly Census of Employment and Wages (QCEW) program. Current Employment Statistics (CES) data is used to supplement QCEW data in industries where some workers are not covered by Unemployment Insurance. Self-employment estimates, derived from occupational employment data, are added to the industry projection.
- After initial industry projections are completed, results are reviewed and adjusted as necessary to reflect employment changes that have recently occurred for which reliable and quantifiable data are available.
- Occupational projections begin with the completed industry data and related staffing patterns. Staffing patterns, a product of the Occupational Employment Statistics (OES) Survey program, represent the number of workers in each occupation distributed across the industries in which they are employed. For example, *Accountants* are employed in nearly every industry, while *Judges* are found only in State or Federal Government.
- After the occupational employment projections have been produced, results are evaluated for reasonableness and consistency between industries and occupations.