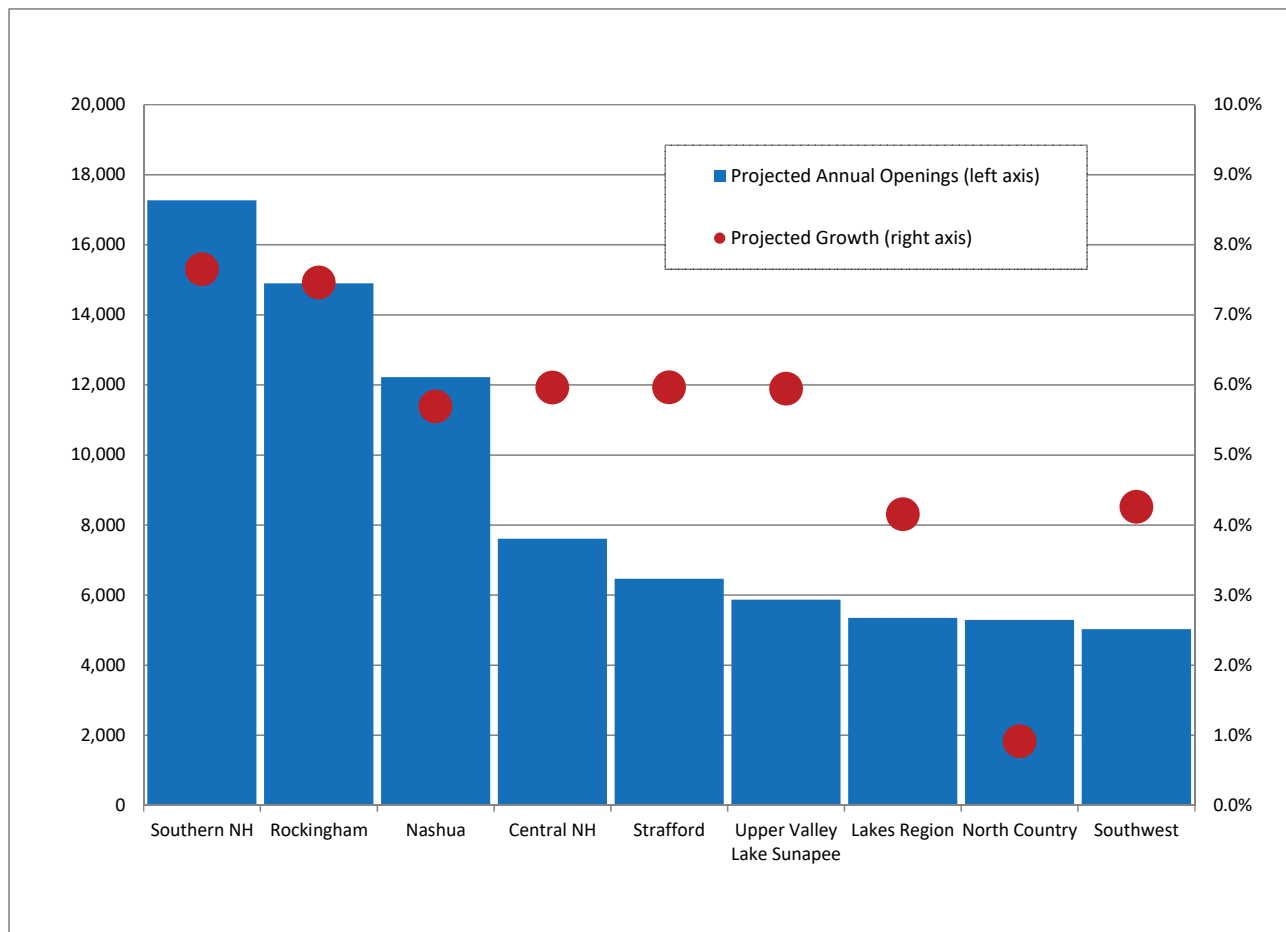


Looking Ahead to 2026: Employment Projections for New Hampshire Planning Regions

New Hampshire’s nine planning commission regions are all expected to see 2016 to 2026 employment growth ranging from 0.9 percent in the North Country region to 7.7 percent in the Southern New Hampshire region. Statewide, employment is projected to increase by 6.1 percent during the same time period.

Employment projections for planning regions have been developed as a supplement to statewide long-term employment projections. In New Hampshire, the nine regional planning commissions are required by law to “prepare regional master plans, compile housing needs assessments, and review developments of regional impact”.¹ Employment projections provide valuable information about growing industries and occupations that can assist regional planners with these obligations. They also provide education and workforce professionals with data to assess regional workforce demands.

Planning Regions with large population tend to have faster projected growth and more openings, 2016 to 2026



¹ New Hampshire Association of Regional Planning Commissions, <http://www.nharpc.org/>. Accessed January 4, 2019.

Most of New Hampshire's population is concentrated in three planning commission regions—Nashua, Southern New Hampshire, and Rockingham. In addition, each region has its own geographic features such as lakes, mountains, and proximity to state borders. These and other factors have a significant effect on industry and occupational growth and the composition of the labor force in each region.

The 2016 to 2026 outlook for the nine regions falls generally into three different groups, based on projected employment growth. Two of the three most populous regions, Southern New Hampshire and Rockingham, are projected to have both the fastest rate of growth and the largest number of job openings. Growth is driven by the population and demand for a broad variety of goods and services. A second group of regions, Strafford, Central New Hampshire, Upper Valley Lake Sunapee, and Nashua, is projected to grow roughly at the state average. Each of these regions have a limited number of industries driving employment growth, such as Healthcare in the Upper Valley Lake Sunapee region, Government in the Central New Hampshire region, and Education in the Strafford region. A third group of regions, Southwest, Lakes, and North Country, is projected to grow below the state average. These regions are less densely populated and have a smaller industrial base to drive growth.

About Planning Region Projection Data

Tables with projections data for each planning region can be found on the Economic and Labor Market Information Bureau's web site, at www.nhes.nh.gov/elmi/proj.htm.

In New Hampshire, statewide projections data are classified into more than 700 detailed occupations using the Standard Occupational Classification (SOC) system. Projected employment data for planning regions are provided at the major occupational group level, the minor occupational group level, and the detailed occupational level. Due to confidentiality requirements, employment levels for many detailed-level occupations cannot be disclosed; these occupations are marked with an 'n' to indicate confidentiality has been applied.

In the 2016 to 2026 planning region projections, occupations with the best expectations for future employment have been identified as a "very favorable" occupation. A very favorable occupation is defined as having a projected growth rate ranking in the top third of detailed occupations in the region and also having a projected number of openings ranking in the top third of detailed occupations in the region.² Occupations meeting this criteria are labeled with a checkmark in the Planning Region Projections data tables. In each region, about 15 percent of occupations meet the criteria as very favorable for the ten-year period. Projected growth and openings rankings are relative to each region, revealing some of the unique characteristics of that region. An occupation may be very favorable in only one region, or may qualify in all regions.

Because some occupations have a very large number of workers, they will, by definition, generate a large number of projected openings in every region through the ten-year period. Consequently, these occupations are considered as very favorable in most, if not all, regions. Examples of such occupations are *Combined food preparation and serving workers, including fast food; Waiters and waitresses; Maids and housekeeping cleaners; and Personal care aides.*

² This definition of 'very favorable' for Planning Regions differs from the definition of very favorable occupations used in the statewide long-term projections and the *Job Locator* publications, found on the ELMi website, at www.nhes.nh.gov/elmi.

Job Openings — Labor Force Exits, Occupational Transfers, and New Job Growth

The 2016 to 2026 round of employment projections incorporates a new methodology for estimating the projected number of annual job openings. This new methodology was introduced with the release of the statewide 2016 to 2026 projections.

Based on the new methodology, total projected annual openings are a combination of three factors that indicate a potential open job: labor force exits, occupational transfers, and openings created from growth.

Labor force **exits** are defined as workers that leave the workforce entirely to go to school, start a family, or retire, for example. Occupational **transfers** are defined as workers that leave one job to go to another position in a different occupational group, by promotion or by a change in jobs.

Along with exits and transfers, job openings are created from **growth** in a particular occupation. Growth is simply the difference between base year employment and projected employment in a future period. Growth occurs when there is demand for workers in a particular occupation, often due to increased demand for products and services produced by the industries that employ those workers. Occupational growth can be negative for an occupation, as demand for products or services declines or changes in technology result in fewer workers needed. Despite declining or slow growth in some occupations, the need to replace workers that retire or move on to other jobs may still create job openings.

Projected job openings for an occupation should not be viewed as a precise estimate of the number of expected job openings but more as a guide to the magnitude of job opportunities in one occupation compared to opportunities in other occupations.

This new methodology has resulted in a significantly higher number of openings than previous versions of long-term projections. Comparison with prior versions of projections is discouraged.

For a detailed description of the methodology, please refer to the publication *Employment Projections by Industry and Occupation, base year 2016 to projected year 2026*, available on the Economic Labor Market Information Bureau's (ELMI) website at:

<https://www.nhes.nh.gov/elmi/products/documents/proj-pub-2016-26.pdf>

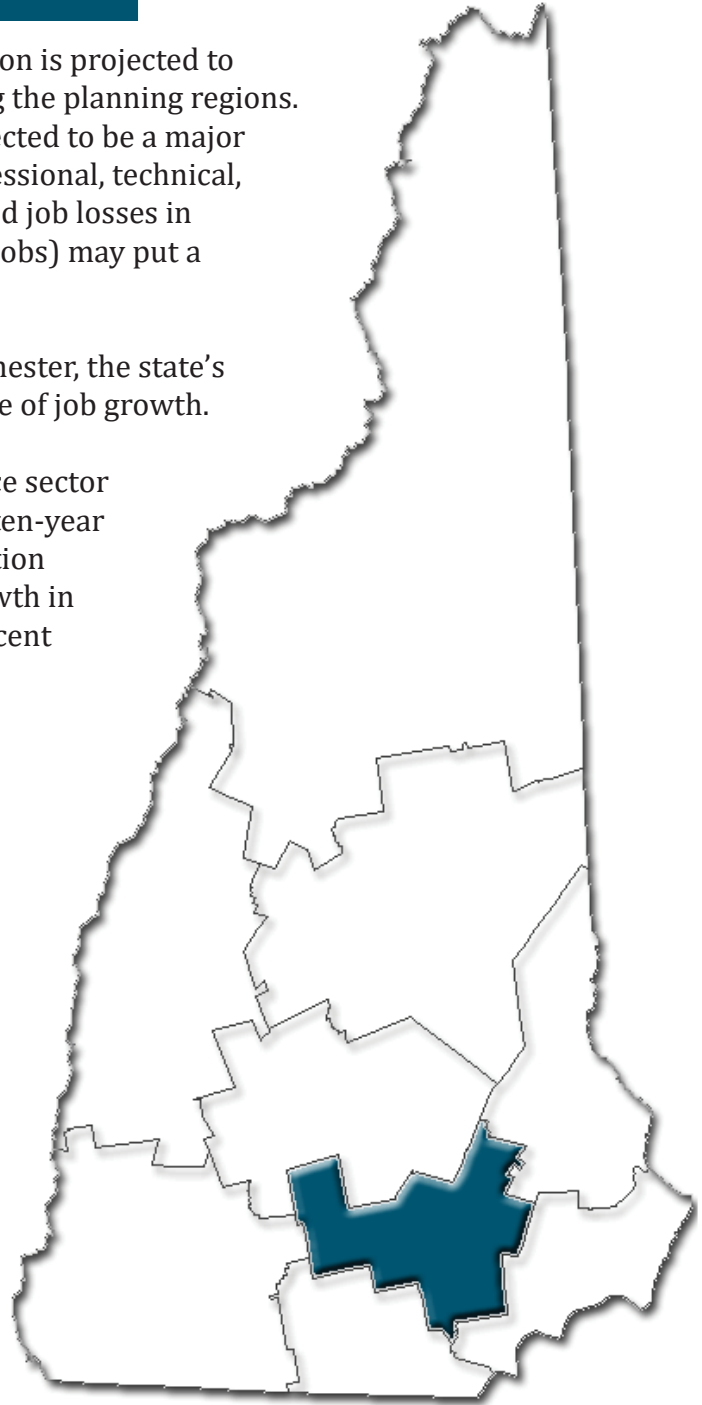
Factors affecting regional employment growth

In regions with larger populations, projected employment growth is likely to be faster and annual job openings more numerous. Demographics of a region can affect the types of employers located there, which in turn affects the type of workers in demand. For example, areas with relatively younger populations can expect to have faster-growing employment in the Education sector, driving demand for workers such as teachers, education administrators, and bus drivers.

Geography can also have an effect on the types of industries and occupations in a region. Proximity to large metropolitan areas and access to major highways can attract employers looking for ease of shipping products in or out, as well as accessibility to a large volume of customers. Physical features such as the seacoast, lakes, or mountains attract tourists that support employment in the Accommodation and food services and Arts, entertainment, and recreation industries.

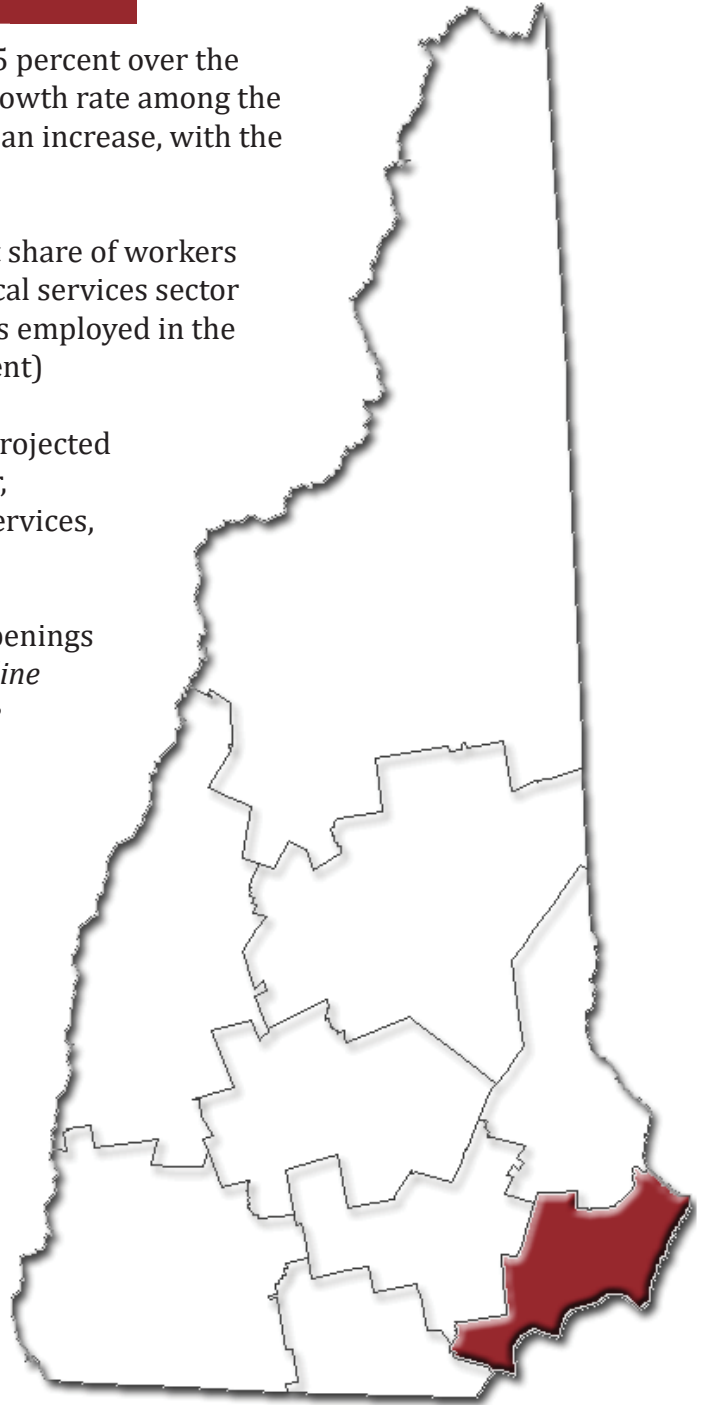
Southern New Hampshire Planning Commission

- Employment in the Southern New Hampshire Region is projected to grow by 7.7 percent, the fastest growth rate among the planning regions. The Healthcare and social assistance sector is expected to be a major contributor to job gains (3,440 jobs) as is the Professional, technical, and scientific services sector (1,100 jobs). Projected job losses in Manufacturing (-630 jobs) and Information (-110 jobs) may put a damper on total employment growth.
- A diversified industry base centered around Manchester, the state's largest population center, is expected to be a source of job growth.
- Employment in the Healthcare and social assistance sector is also projected to grow by 17.5 percent over the ten-year period, faster than any other region. The Construction industry is also expected to experience strong growth in this region, with employment growing by 11.2 percent over ten years.
- Occupations with the most projected annual job openings include *Nursing assistants; Customer service representatives; Stock clerks and order fillers; Retail salespersons; Secretaries and administrative assistants, except legal and medical, and executive; General office clerks; and Laborers and freight, stock, material movers.*
- Occupations with a very favorable outlook include *Accountants and auditors; Registered nurses; Restaurant cooks; Childcare workers; Heavy and tractor-trailer truck drivers; and Light truck or delivery services drivers.*



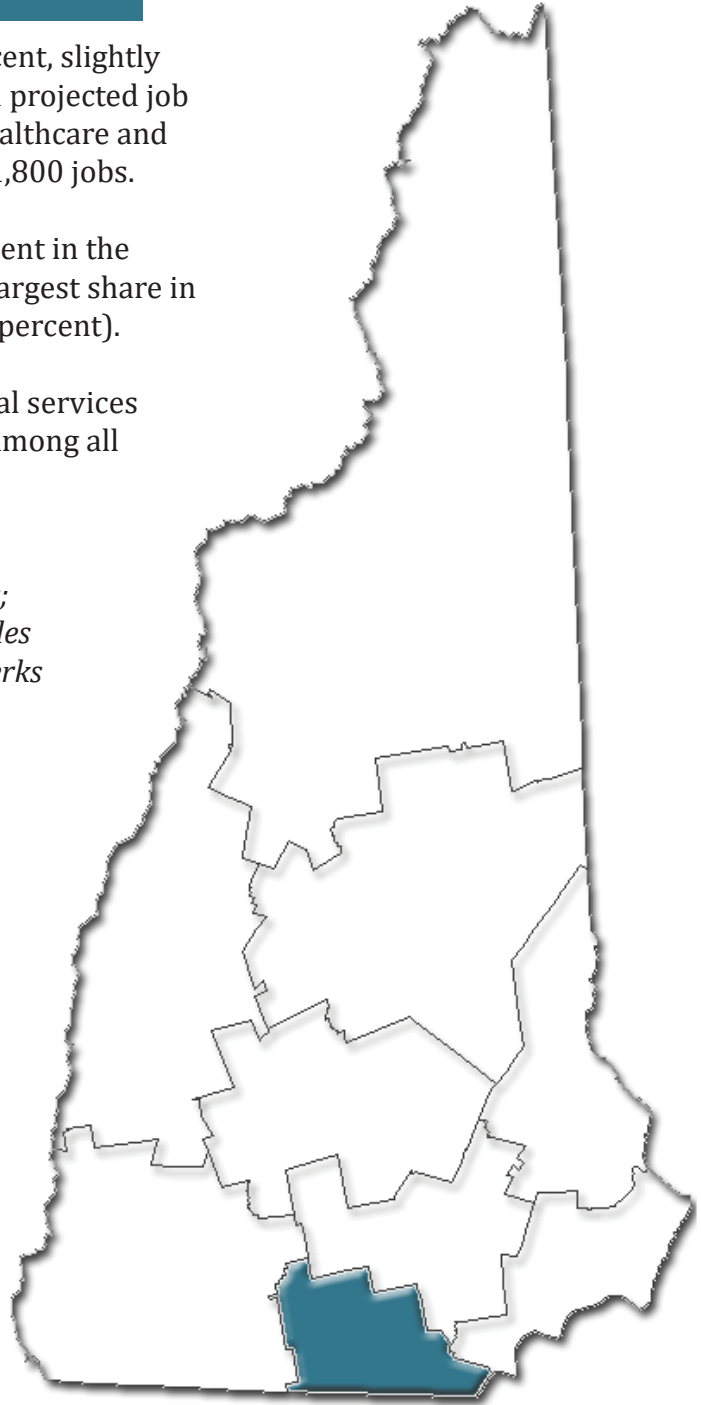
Rockingham Planning Commission

- The Rockingham Region is projected to grow by 7.5 percent over the ten-year period, the second-fastest employment growth rate among the regions. All industry sectors are projected to show an increase, with the exception of Manufacturing (-125 jobs).
- Among the nine regions, this region has the largest share of workers employed in the Professional, scientific and technical services sector (6.1 percent) and has the smallest share of workers employed in the Healthcare and social assistance sector (10.1 percent)
- In this region, Healthcare and social assistance is projected to grow by 17.3 percent, the fastest-growing sector, followed by Professional, scientific and technical services, projected to grow by 15.3 percent.
- Occupations with the most projected annual job openings include *Nursing assistants, Restaurant cooks; First-line supervisors of retail sales workers; Customer service representatives; Stock clerks and order fillers; and General office clerks.*
- Occupations with a very favorable outlook include *Hairdressers, hair stylists, and cosmetologists; Market research analysts and marketing specialists; Software developers, applications; Medical assistants; and Nonfarm animal caretakers.*



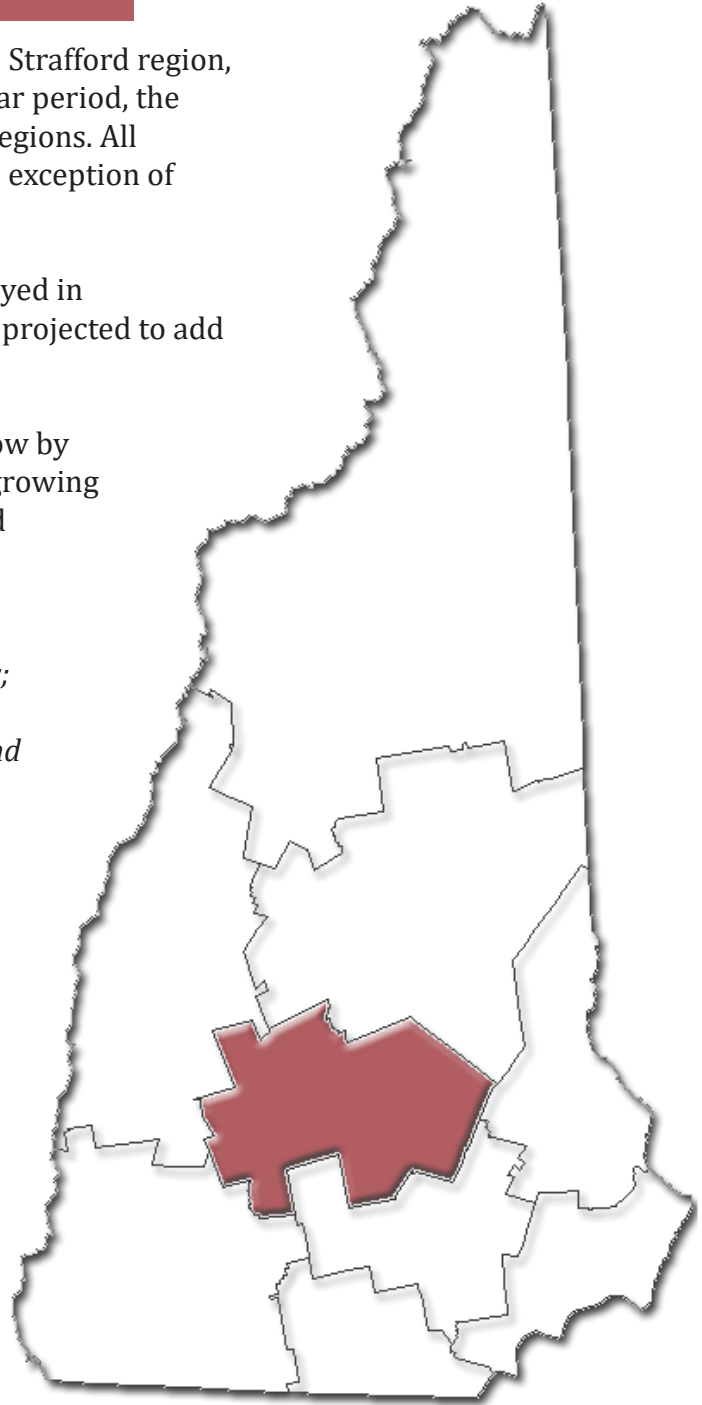
Nashua Regional Planning Commission

- The Nashua region is projected to grow by 5.7 percent, slightly slower than the state average. The only sector with projected job losses is Manufacturing (-1,200 jobs), while the Healthcare and social assistance sector is projected to add nearly 1,800 jobs.
- This region has the third-largest share of employment in the Retail trade sector (15.9 percent) and the second-largest share in Professional, technical, and scientific services (5.5 percent).
- Employment in Professional, scientific and technical services is projected to grow by 14.2 percent, second-best among all regions through 2026.
- Occupations with the most projected annual job openings include *General and operations managers; Personal car aides; First-line supervisors of retail sales workers; Customer service representatives; Stock clerks and order fillers; and Laborers, freight, stock, and material movers.*
- Occupations with a very favorable outlook include *Financial managers; Software developers, applications; Medical assistants; Nonfarm animal caretakers; and Helpers—Production workers.*



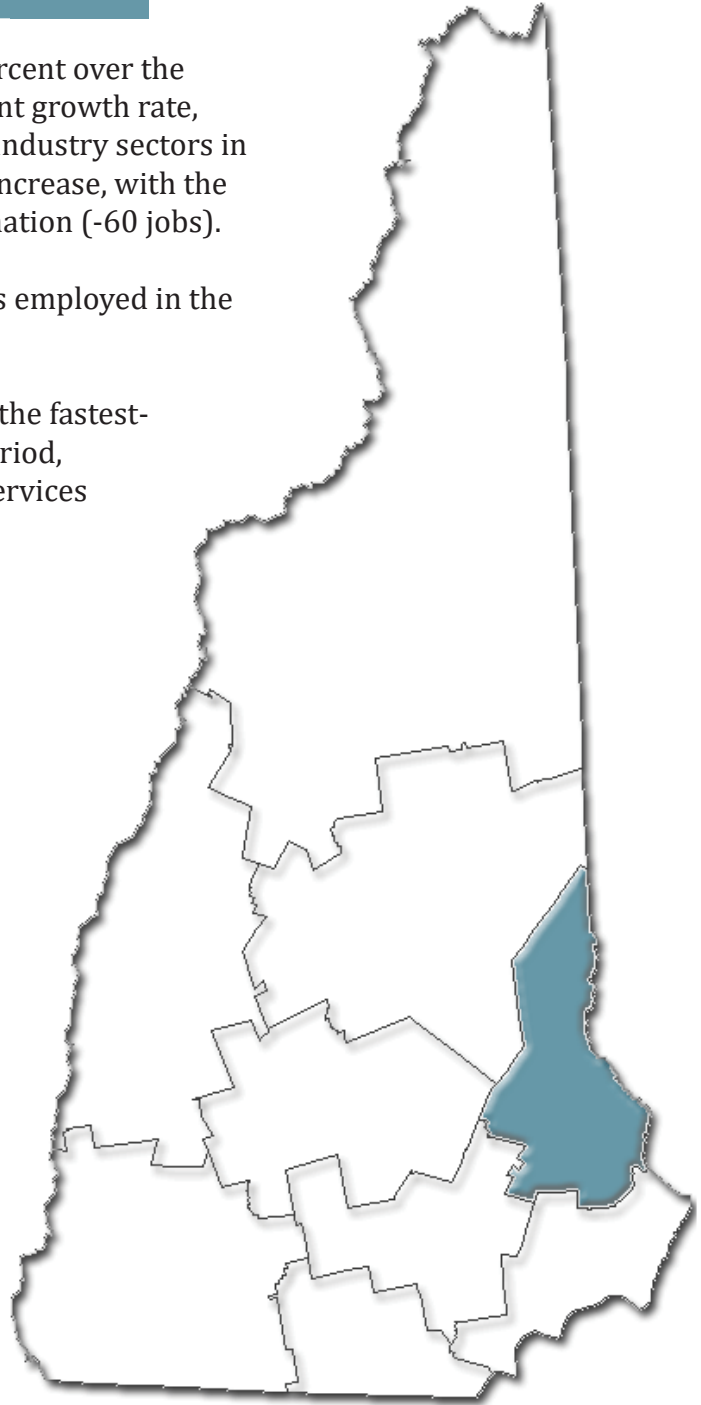
Central New Hampshire Planning Commission

- The Central New Hampshire region, along with the Strafford region, is projected to grow by 6.0 percent over the ten-year period, the third-fastest employment growth rate among the regions. All sectors are projected to show an increase, with the exception of Manufacturing (-250 jobs).
- This region has the largest share of workers employed in Government (15.6 percent); this industry sector is projected to add relatively few jobs over the ten-year period.
- Healthcare and social assistance is projected to grow by 15.8 percent over the ten-year period, the fastest-growing sector, followed by Wholesale trade, with projected employment growth of 11.0 percent.
- Occupations with the most projected annual job openings include *General and operations managers; Registered nurses; Nursing assistants; Stock clerks and order fillers; General office clerks; and Heavy and tractor-trailer truck drivers.*
- Occupations with a very favorable outlook include *Medical and health services managers; Home health aides; Physical therapist assistants; Massage therapists; Medical assistants; Nonfarm animal caretakers; and Nursing assistants.*



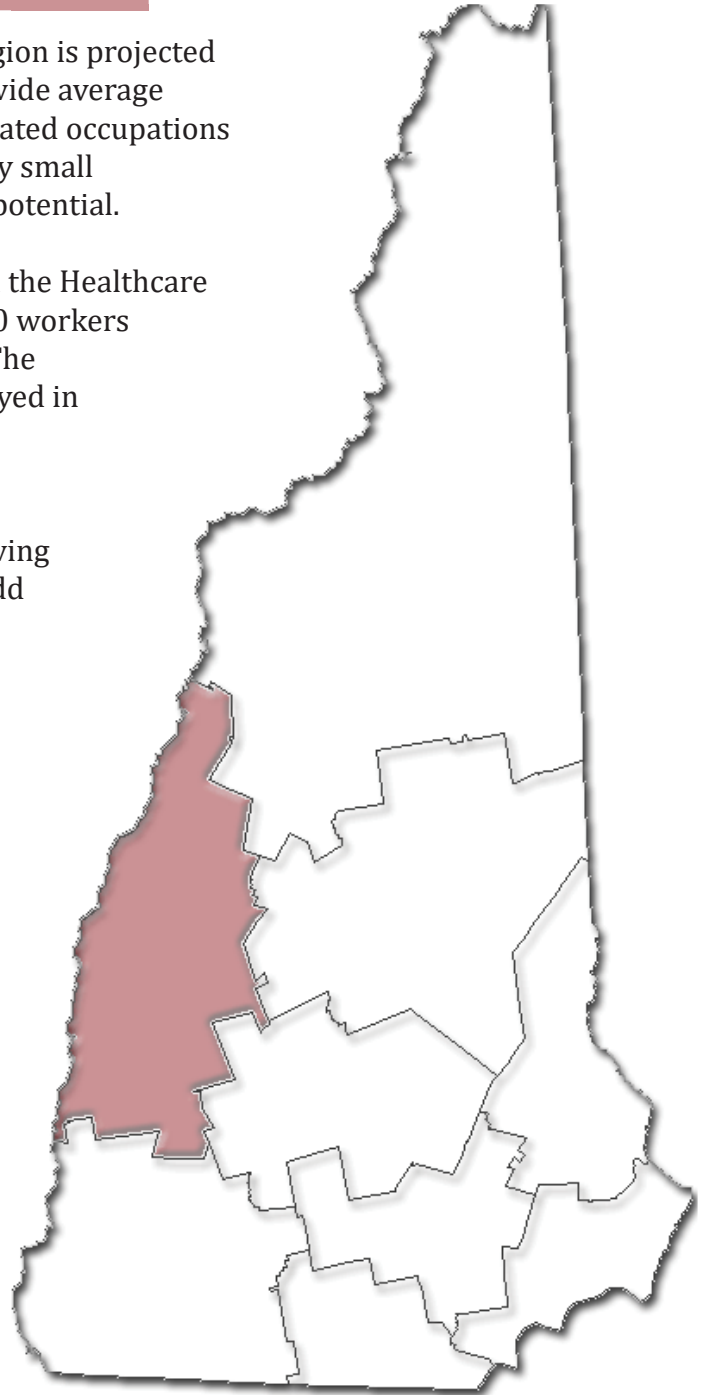
Strafford Regional Planning Commission

- The Strafford region is projected to grow by 6.0 percent over the ten-year period; this is the third-fastest employment growth rate, along with the Central New Hampshire region. All industry sectors in this region are projected to show an employment increase, with the exception of Manufacturing (-195 jobs) and Information (-60 jobs).
- The region has the second-largest share of workers employed in the Educational services industry sector, 14.9 percent.
- Healthcare and social assistance is projected to be the fastest-growing sector (15.9 percent) over the ten-year period, followed by Professional, scientific and technical services (11.2 percent).
- Occupations with the most projected annual job openings include *Teacher assistants; Nursing assistants; Customer service representatives; Stock clerks and order fillers; and Laborers and freight, stock, material movers.*
- Occupations with a very favorable outlook include *Software developers, applications; Medical assistants; Hairdressers, hair stylists, and cosmetologists; and Maids and housekeeping cleaners.*



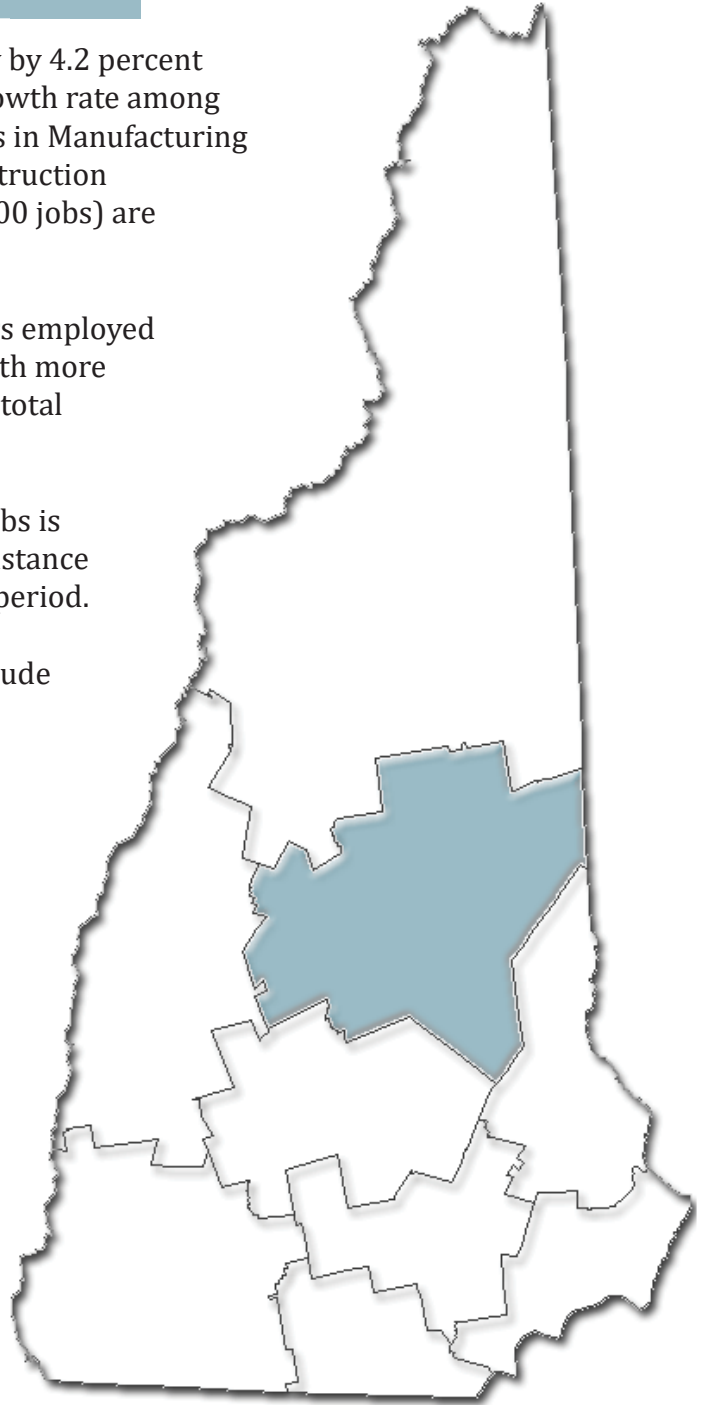
Upper Valley Lake Sunapee Regional Planning Commission

- Employment in the Upper Valley Lake Sunapee Region is projected to grow by 5.9 percent, slightly less than the statewide average through 2026. Employment gains in healthcare-related occupations will contribute to growth, but the region's relatively small population has an impact on employment growth potential.
- This region has the largest share of employment in the Healthcare and social assistance sector, with more than 11,250 workers accounting for 21.8 percent of total employment. The region also has the largest share of workers employed in Educational services (17.0 percent).
- Healthcare and social assistance sector is also projected to grow by 14.4 percent, the fastest-growing among the region, and this sector is projected to add the most new jobs as well, with 1,625 openings projected over the ten-year period.
- Occupations with the most projected openings include *Registered nurses; Nursing assistants; Stock clerks and order fillers; and Secretaries and administrative assistants, except legal and medical, and executive.*
- Occupations with a very favorable outlook include: *Nurse practitioners; Home health aides; Medical assistants; and Helpers—production workers.*



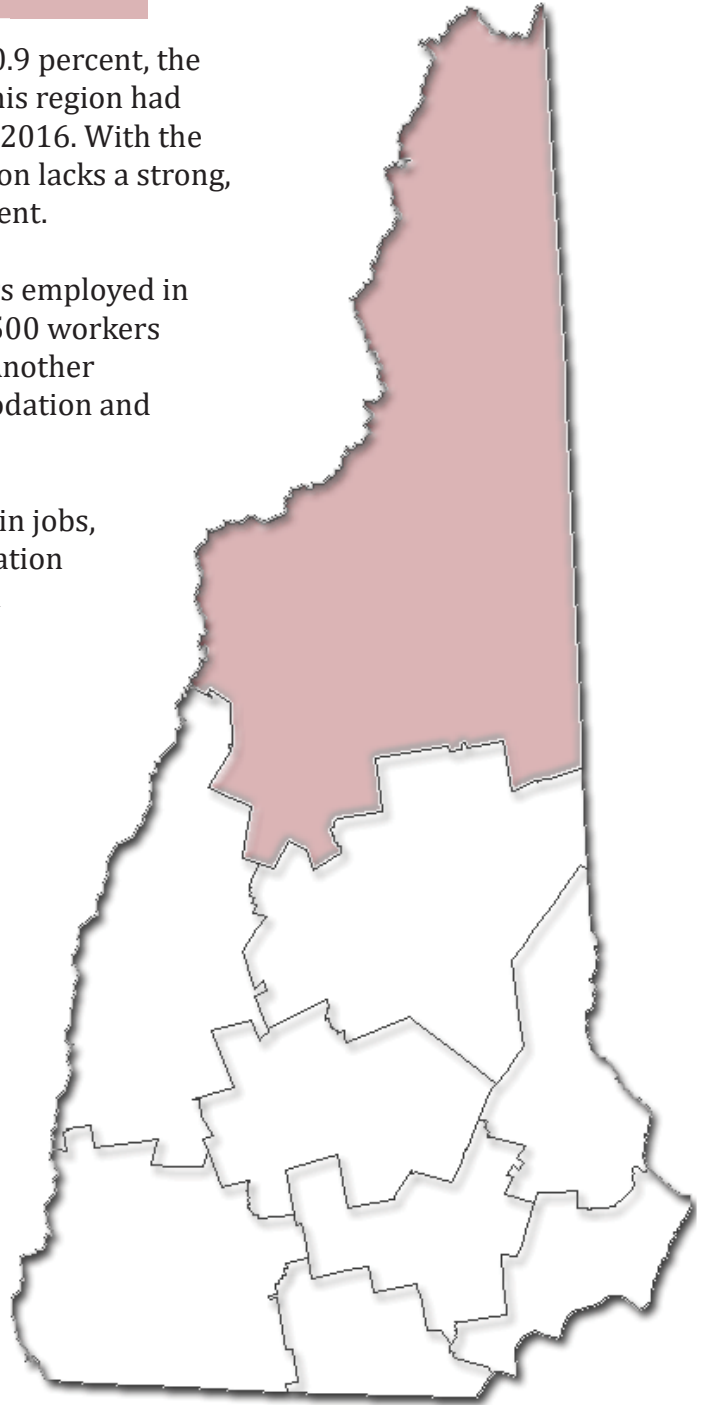
Lakes Region Planning Commission

- Employment in the Lakes Region is projected grow by 4.2 percent through 2026, the second-slowest employment growth rate among all regions. The region is projected to see job losses in Manufacturing (-475 jobs) and Information (-40 jobs), while Construction (280 jobs) and Healthcare and social assistance (600 jobs) are among the bright spots.
- This region has the second-largest share of workers employed in the Accommodation and food services sector, with more than 5,400 workers accounting for 12.0 percent of total employment.
- As with all but one region, the largest net gain in jobs is projected to occur in the Healthcare and social assistance sector, expected to add 600 jobs over the ten-year period.
- Occupations with the most projected openings include *Landscaping and grounds keeping workers, Nursing assistants, and Personal care aides.*
- Occupations with a very favorable outlook include *Market research analysts and marketing specialists; Software developers, applications; Physical therapists; Veterinary technologists and technicians; and Home health aides.*



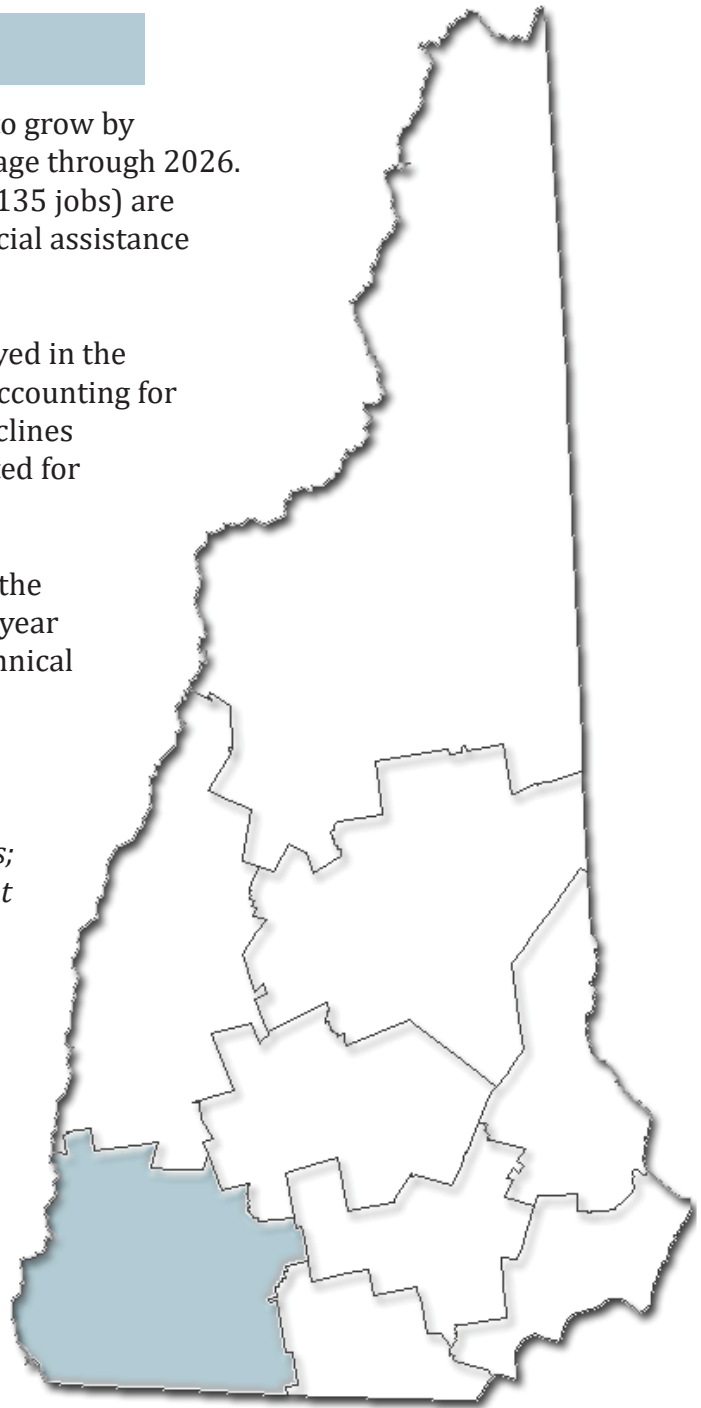
North Country Council

- The North Country region is projected to grow by 0.9 percent, the slowest employment growth rate through 2026. This region had the smallest population among the nine regions in 2016. With the population spread over its large land area, the region lacks a strong, concentrated industrial base to generate employment.
- This region has the second-largest share of workers employed in the Retail trade industry sector, with more than 7,500 workers accounting for 16.7 percent of total employment. Another 16.9 percent of workers are employed in Accommodation and food services, the most of any region.
- Alone among the nine regions, the largest net gain in jobs, nearly 460, is projected to occur in the Accommodation and food services sector. The Healthcare and social assistance industry sector is projected to lead employment gains in all of the other regions.
- The region's large share of Accommodation and food services sector employment is projected to lead to numerous annual job openings for related occupations, including *Combined food preparation workers, excluding fast food; Waiters and waitresses; Maids and housekeeping cleaners; and Restaurant cooks.*
- Occupations with a very favorable outlook include: *Market research analysts and marketing specialists; Software developers, applications; Self-enrichment education teachers; and Nurse practitioners.*



Southwest Region Planning Commission

- Employment in the Southwest region is projected to grow by 4.3 percent, significantly below the statewide average through 2026. Projected job losses in the Manufacturing sector (-135 jobs) are expected to be offset by gains in Healthcare and social assistance (850 jobs) and Retail trade (140 jobs).
- The region has the largest share of workers employed in the Manufacturing sector, with nearly 5,800 workers accounting for 13.2 percent of total employment. Employment declines in this sector are projected to be lower than expected for most regions.
- Healthcare and social assistance is projected to be the fastest-growing sector (13.5 percent) over the ten-year period, followed by Professional, scientific and technical services (11.0 percent).
- Occupations with the most projected annual job openings include *Personal care aides; Customer service representatives; Stock clerks and order fillers; and Secretaries and administrative assistants, except legal and medical, and executive.*
- Occupations with a very favorable outlook include *Social and human service assistants; Registered nurses; Nursing assistants; Restaurant cooks; and Personal care aides.*



For More Information

For more about employment projections, including statewide long-term projections, statewide short-term projections, and the *Job Outlook* and Locator, go to www.nhes.nh.gov/elmi/proj.htm, or contact Michael Argiropolis, Labor Market Analyst, at (603) 228-4377 or michael.g.argiropolis@nhes.nh.gov.

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