



STATE OF NEW HAMPSHIRE WORKFORCE ASSESSMENT

Executive Report

In May 2023, the State of New Hampshire completed a Workforce Assessment of its **identified target industry clusters**:



Health Care

Largest cluster in the state
Above-average earnings and employment growth
Major contributor to the state's GRP



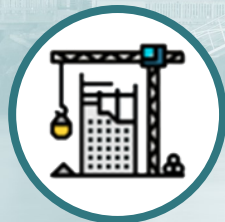
Hospitality

Lags other clusters
Vital for quality of life, population retention, and workforce attraction



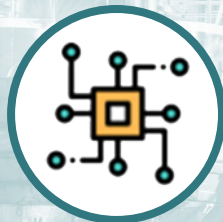
Manufacturing

Large share of employment in the state
Higher-than-average earnings



Construction

Strong growth, even during the pandemic



Technology

Relatively small cluster
Driving job growth in the state

While there are many more industries that support New Hampshire's economy, the intent of this research was to identify and study the **high-wage jobs that have shown the strongest growth** within the identified industry clusters.

With tightening resources and increased demand on workforce and economic development entities, this focus will allow the State to make strategic decisions about **how and where to pursue proactive workforce attraction and retention strategies**.



New Hampshire Department of
**BUSINESS AND
ECONOMIC AFFAIRS**

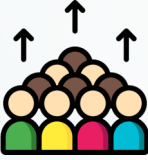


New Hampshire's Labor Force


The state's population is relatively older, affluent (both in terms of median earnings and household income), and educated. While this is good in terms of worker well-being, it may indicate a lack of entry-level, middle-skill, and trades workers.

There will likely be an intensification of the overlapping workforce, healthcare, and housing crises as Baby Boomers begin to retire and the younger cohorts lag in growth.

6%
population growth
(2012-2022)




New Hampshire's population is growing quickly compared to the rest of New England but slightly slower than the nation.




The median age is
43

This is significantly higher than New England and the nation.




New Hampshire's population is the **second oldest** in the US.

11%
racial diversity



This is significantly lower than New England and the nation.


1.8%
unemployment rate
(August 2023)



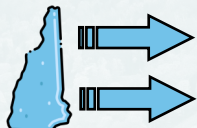
This is significantly lower than New England and the nation.

New Hampshire has **historically low** unemployment.


64.8%
labor force participation rate
(August 2023)




This is higher than New England and the nation, however it is **declining over time** in keeping with regional and national trends.



New Hampshire is a net exporter of talent, with
45,964
more residents commuting out of the state than commuting in.




Many of these commuters are high-wage earners.




21,008
projected labor force growth
(2022-2032)

This projection is based on the state's population growth and labor participation rates by age.



This increase will not be enough to fill the projected
964,485
openings (new jobs + replacement jobs due to retirement or occupation change) anticipated in the next **10 years**.



This equates to
96,451
average annual openings, **92%** of which will be replacement jobs.

Workforce Gaps in the Target Clusters

The staffing patterns of New Hampshire's target industries were analyzed to identify the occupations most critical to the health and future growth of the clusters while also providing life-sustaining wages.

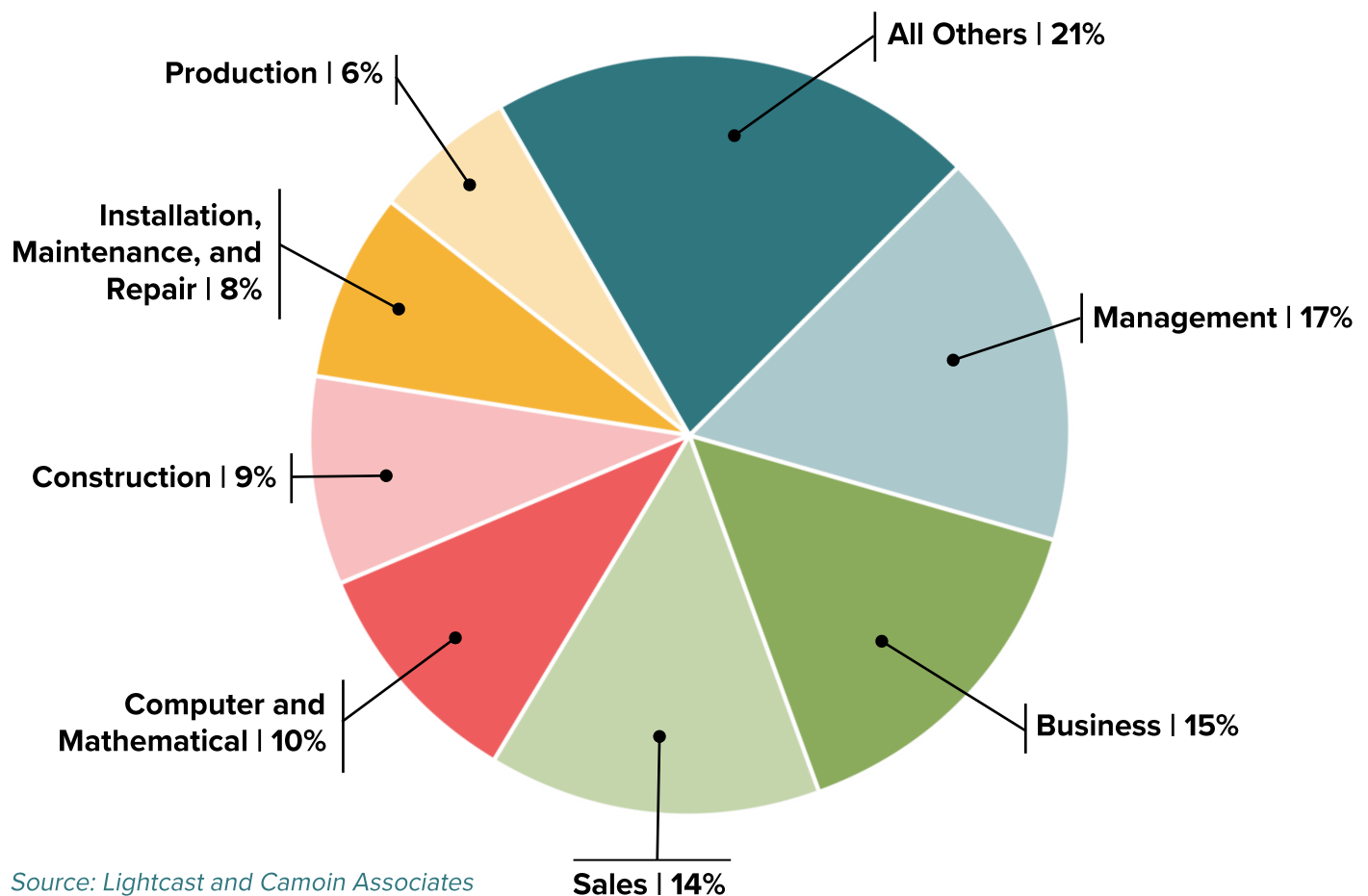
The 80 top occupations across New Hampshire's five target industry clusters are projected to have nearly 197,000 job openings from 2022 to 2032.

Only **6,100** of these jobs will be filled by labor force growth, leaving a gap of nearly **191,000** unfilled jobs

Of the 80 top occupations, **34** are projected to have gaps of over **2,000 workers** between 2022 and 2032.

Of these 34 top occupations with the largest gaps, **Management occupations** accounted for the largest portion of the projected labor force gap (17%). Other large occupational group gaps include **Business and Financial Operations** (15% of the gap) and **Sales and Related Occupations** (14%).

Share of the Projected Labor Force Gap by Occupational Sector



Source: Lightcast and Camoin Associates

These 34 Top Occupations with the largest gaps are shown in the table below at the 5-digit SOC code level. Together, they account for **77% of the 80 top occupation jobs** in New Hampshire and **80% of the projected workforce gap**. Altogether, they are expected to have almost **156,737 openings over the next decade**, of which **only 4,682 will be filled by labor force growth**.

The occupations with the largest gaps include:

General and Operations Managers
11,905 jobs

Heavy and Tractor-Trailer Truck Drivers
9,235 jobs

First-line Supervisors of Retail Sales Workers
7,521 jobs

Software Developers and Software Quality Assurance Analysts and Testers
9,384 jobs

Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products
8,070 jobs

First-line Supervisors of Office and Administrative Support Workers
7,247 jobs

Software Developers and Software Quality Assurance Analysts and Testers
9,384 jobs

Registered Nurses
7,946 jobs

Top Occupations With the Largest Projected Employment Gaps, 2022-2032

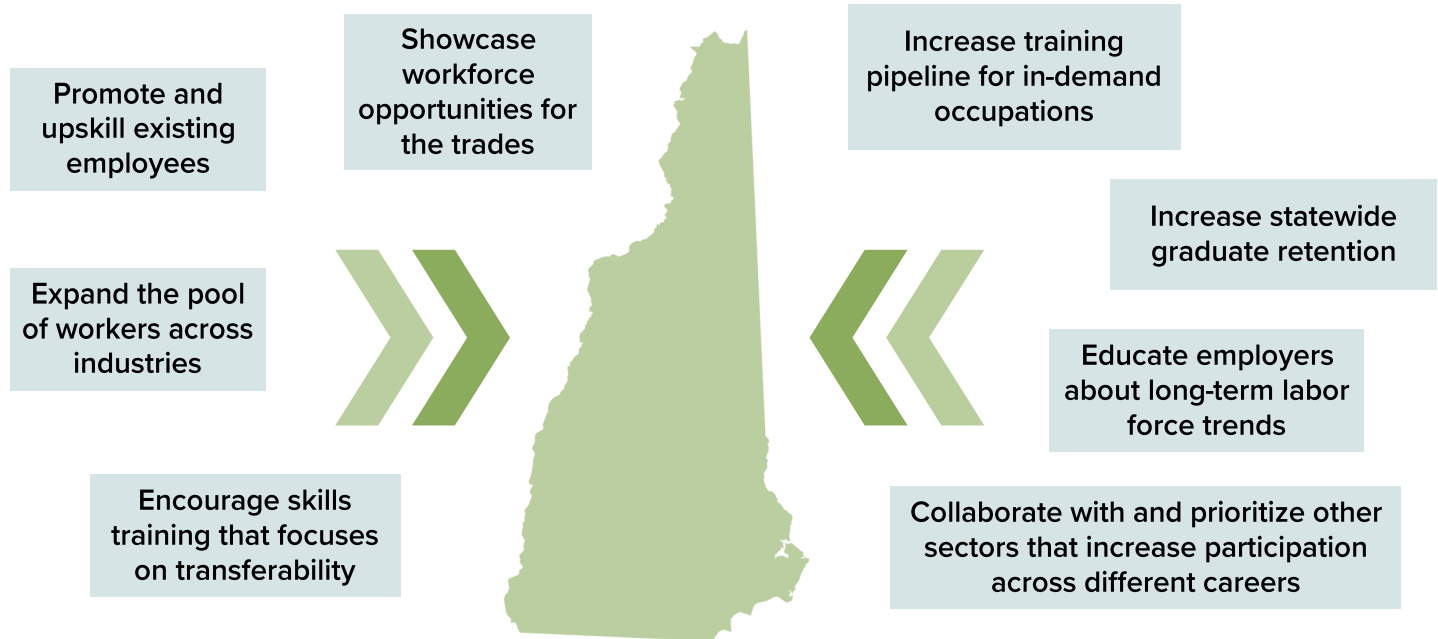
SOC	Description	Gap Analysis (2022 - 2032)		
		2022 Employment	Labor Force Growth	Projected Openings = Gap
11-1021	General and Operations Managers	13,404	396	12,301 (11,905)
15-1256	Software Developers and Software Quality Assurance Analysts and Testers	9,634	322	9,706 (9,384)
53-3032	Heavy and Tractor-Trailer Truck Drivers	8,078	233	9,468 (9,235)
41-4012	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	7,399	223	8,293 (8,070)
29-1141	Registered Nurses	14,401	412	8,358 (7,946)
41-1011	First-Line Supervisors of Retail Sales Workers	7,576	195	7,716 (7,521)
43-1011	First-Line Supervisors of Office and Administrative Support Workers	7,550	204	7,451 (7,247)
13-2011	Accountants and Auditors	6,239	181	5,921 (5,740)
41-3091	Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel	4,496	135	5,690 (5,556)
47-2031	Carpenters	5,638	153	5,274 (5,121)
49-9071	Maintenance and Repair Workers, General	5,208	150	5,234 (5,084)
39-9031	Exercise Trainers and Group Fitness Instructors	1,906	80	4,556 (4,476)
13-1111	Management Analysts	4,249	127	4,349 (4,222)
13-1198	Project Management Specialists and Business Operations Specialists, All Other	5,000	151	4,249 (4,098)
47-2111	Electricians	3,462	105	4,051 (3,946)
51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	3,321	82	3,772 (3,689)
11-9198	Personal Service Managers, All Other; Entmt. and Rec. Managers; and Managers, All Other	4,336	131	3,686 (3,555)
11-3031	Financial Managers	4,307	131	3,678 (3,547)
13-1161	Market Research Analysts and Marketing Specialists	2,919	95	3,617 (3,521)
13-1071	Human Resources Specialists	3,114	94	3,348 (3,255)
51-1011	First-Line Supervisors of Production and Operating Workers	3,004	84	3,024 (2,939)
51-9161	Computer Numerically Controlled Tool Operators	2,733	74	2,985 (2,911)
47-1011	First-Line Supervisors of Construction Trades and Extraction Workers	2,985	82	2,945 (2,863)
15-1232	Computer User Support Specialists	3,346	101	2,878 (2,777)
11-3021	Computer and Information Systems Managers	3,196	95	2,707 (2,612)
25-3021	Self-Enrichment Teachers	1,853	62	2,666 (2,605)
15-1211	Computer Systems Analysts	3,125	93	2,530 (2,437)
47-2152	Plumbers, Pipefitters, and Steamfitters	2,288	66	2,498 (2,432)
49-9021	Heating, Air Conditioning, and Refrigeration Mechanics and Installers	2,506	71	2,490 (2,419)
13-1028	Buyers and Purchasing Agents	2,416	64	2,319 (2,255)
11-9111	Medical and Health Services Managers	2,260	75	2,324 (2,250)
49-9041	Industrial Machinery Mechanics	2,131	68	2,276 (2,208)
11-9021	Construction Managers	2,676	81	2,266 (2,184)
49-1011	First-Line Supervisors of Mechanics, Installers, and Repairers	2,260	65	2,112 (2,047)
Total		159,015	4,682	156,737 (152,054)

Source: Lightcast and Camoin Associates

Strategies to Support and Grow New Hampshire's Workforce in the Target Industry Clusters

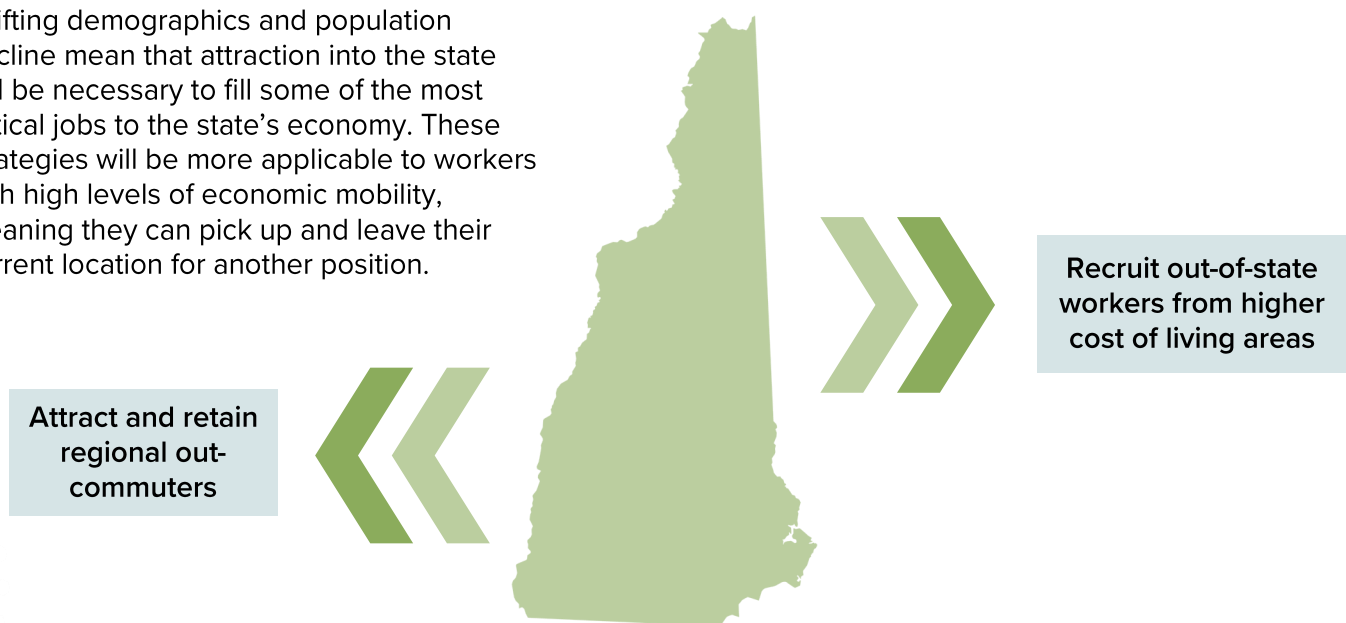
Growing From Within the State

These are strategies that are targeted at the current residents and workforce of New Hampshire, focusing on adapting the skills and guiding career pathways with institutional partners like workforce development leaders and educational institutions.



Attracting From Outside the State

Shifting demographics and population decline mean that attraction into the state will be necessary to fill some of the most critical jobs to the state's economy. These strategies will be more applicable to workers with high levels of economic mobility, meaning they can pick up and leave their current location for another position.



Questions? Please contact Cynthia Harrington, Deputy Director, Division of Economic Development, Department of Business and Economic Affairs, at cynthia.j.harrington@livefree.nh.gov.