

Sullivan County A Workforce Study

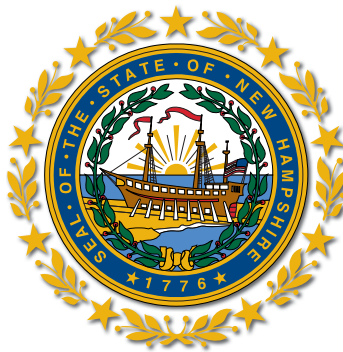
August 2014



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Sullivan County

A Workforce Study



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New Hampshire Employment Security
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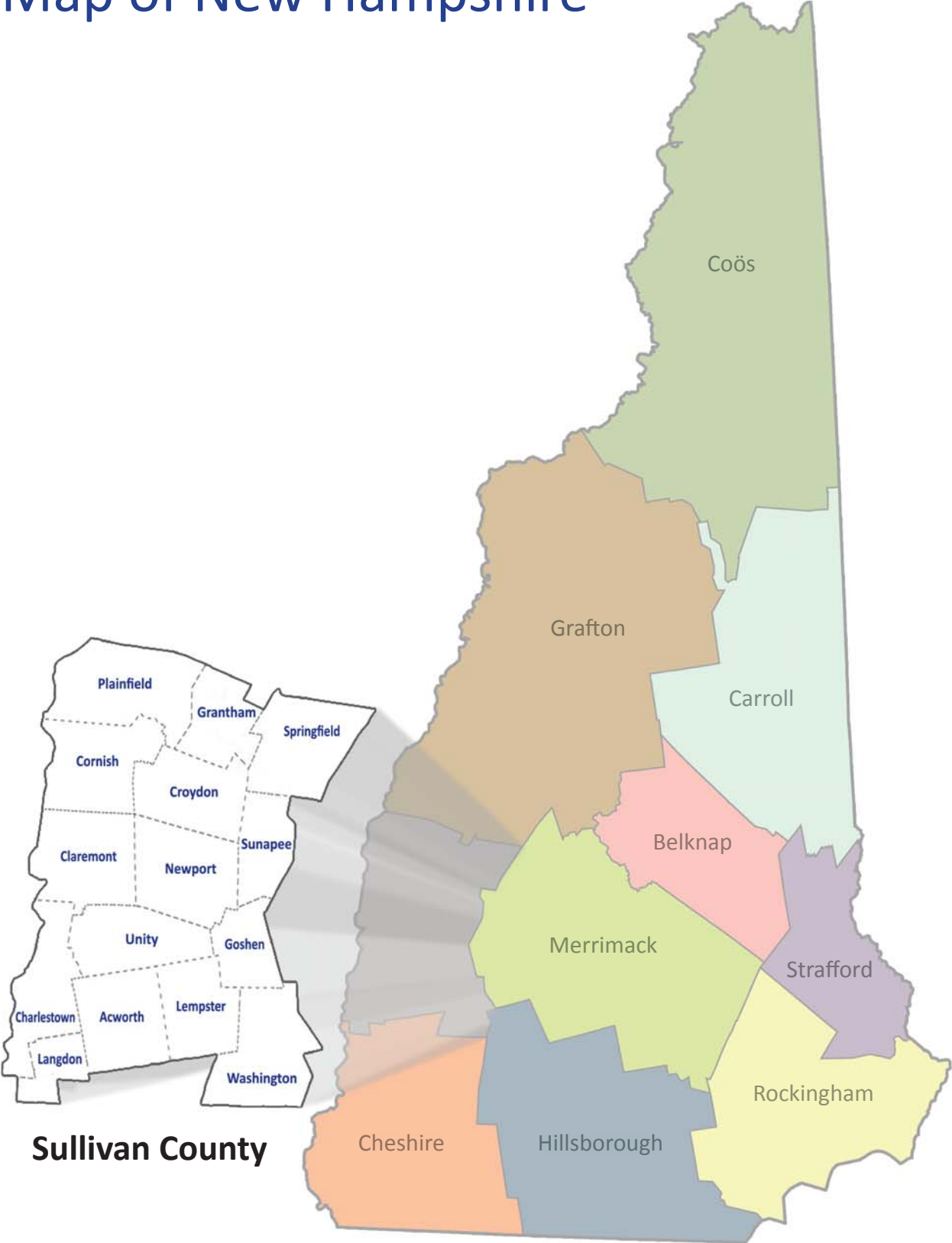
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Map of New Hampshire



Introduction

Located at the mid-point of the New Hampshire-Vermont border, Sullivan County is comprised of one city and 14 towns, covering approximately 538 square miles of land area and 14 square miles of water area. The county itself came into being in 1827, made up of communities originally part of Cheshire County to the south.

The first settlement was in 1735 at Fort #4 in Charlestown, one in a line of forts established as trading posts by the Governor of Massachusetts.¹ Canals were built on the Connecticut River for access upstream to Woodsville, New Hampshire, and in the mid-1800s, railroads provided even better connections for trade.² The Cornish-Windsor Bridge, the longest two-span covered bridge in the world, is one of nine covered bridges in Sullivan County listed on the National Register of Historic Places.³

This area has a long history of water-powered industry, with the Connecticut River forming the western border and the Sugar River, Little Sugar River, and Cold River winding their way across the landscape. Mills processed trees, wool, corn, grain, apples, and clay into products that were shipped out by rail.⁴ Manufacturing continues to be the largest industry sector in Sullivan County today. In 2012, just over 25 percent of private employment in Sullivan County was in the manufacturing industry sector, compared to 12.5 percent of private employment statewide.⁵

While industry dominated the riversides, the remainder of the county was primarily forest and agricultural. Even today, Sullivan County has by far the largest proportion of farm and forest open space land in current use, as defined for purposes of property tax assessment. In 2012, 70.9 percent of land acres in Sullivan County were in current use, compared to 52.3 percent statewide.⁶

This study of Sullivan County examines information about those who live and work in the state's third smallest county, such as demographics, labor force, housing, industry employment, and commuting behaviors.

1. Excerpted from *New Hampshire Town Names and Whence They Came*, Hunt, Elmer Munson, Noone House, 1970, p. 6-7.

2. *The Connecticut River*, Environmental Fact Sheet WD-R&L-4, NH Department of Environmental Services, 2008. <<http://des.nh.gov/organization/commissioner/pip/factsheets/rl/documents/rl-4.pdf>>.

3. National Register of Historic Places, National Park Service. <www.nps.gov/nr/>.

4. *The Cold River*, Environmental Fact Sheet WD-R&L-16, NH Department of Environmental Services, 2008. <<http://des.nh.gov/organization/commissioner/pip/factsheets/rl/documents/rl-16.pdf>>.

5. 2012 Annual Average Covered Employment in New Hampshire, Economic and Labor Market Information Bureau, NH Employment Security. <www.nhes.nh.gov/elmi/statistics/qcew-data.htm>.

6. 2012 Current Use Report, NH Department of Revenue Administration. <www.revenue.nh.gov/munc_prop/equalization/2012/documents/cu-county.pdf>.

Demographics

Sullivan County is one of New Hampshire’s smallest counties, both in physical size and population. It is the third smallest in physical size, with 552 total square miles. Only Strafford County (383 square miles) and Belknap County (470 square miles) encompass less of the state.⁷

As of 2012 Census population estimates, Sullivan County had 43,074 residents, accounting for 3.3 percent of the state’s total population. Among the ten New Hampshire counties, Sullivan County ranks ninth in population. Over 30 percent of Sullivan County’s total population resides in Claremont, the only incorporated city in Sullivan County. The county’s 2012 population density of 80.1 persons per square mile of land area is the fourth lowest among New Hampshire counties; Coös, Carroll, and Grafton Counties are less densely populated.

Demographically, Sullivan County is similar to the rest of New Hampshire.⁸ In gender distribution, Sullivan County is about the same as the other counties, as well as the state and the entire nation, with the share of females slightly higher than males.

At 44.2 years, Sullivan County’s median age is higher than New Hampshire’s median age of 41.1 years. It ranks fourth-highest among New Hampshire’s counties, nearly equal to Belknap County (44.5 years). Carroll County (48.2 years) has the highest median age in New Hampshire. Among Sullivan County municipalities, Langdon (40.2 years) and Lempster (40.8 years) have the lowest median ages, while Washington (51.3 years) and Goshen (52.1 years) have the highest.

The distribution of residents by age group is similar for all ten counties and New Hampshire statewide. The largest share of residents in each geographic area is in the working year age

Table 1. Demographics

	New Hampshire	Sullivan County
Total population	1,317,474	43,534
Male	49.3%	49.3%
Female	50.7%	50.7%
Under 20 years	24.7%	22.9%
65 years and over	13.7%	16.6%
Median age (years)	41.1	44.2
Race/Ethnicity		
One race	98.4%	98.4%
White	94.2%	96.8%
Black or African American	1.2%	0.4%
Asian	2.2%	0.6%
Some other race	0.9%	0.6%
Two or more races	1.6%	1.6%
Hispanic or Latino (of any race)	2.8%	1.2%

Source: U.S. Census Bureau, 2008-2012 ACS 5-Year Estimates

⁷ *Area Figures for New Hampshire*, NH GRANIT System, compiled at the NH Office of Energy and Planning, October 2013. <www.nh.gov/oep/data-center/geographic.htm>.

⁸ Demographic Data Source: U.S. Census Bureau; 2008-2012 American Community Survey 5-Year Estimates, Table DP05: ACS Demographic and Housing Estimates; using American FactFinder; <<http://factfinder2.census.gov>>; (6 January 2014).

groups, between 25 and 64 years of age. Sullivan County has a slightly higher share of residents in both the 65 – 74 years and the 75 – 84 years age groups than New Hampshire statewide, while the shares of residents in the 15 – 19 years and the 20 – 24 years age groups are a little lower than in New Hampshire statewide. This difference contributes to the higher median age in Sullivan County.

Educational Attainment

Among Sullivan County residents age 25 and older, 37.1 percent hold just a high school diploma or equivalent. This ranks second-highest among New Hampshire's counties.

Only Coös County, with 39.0 percent of residents holding just a high school diploma or equivalent, has a higher share. Fewer

Sullivan County residents have postsecondary education than the statewide average — 27.1 percent have some college education or an Associate's degree, and 25.7 percent of residents have a Bachelor's degree or higher. Statewide, 28.7 percent of residents age 25 and over have some college education or an Associate's degree, and 33.5 percent have a Bachelor's degree or higher.

Table 2. Share of Residents by Age Group

	New Hampshire	Sullivan County
Under 5 years	5.3%	5.1%
5 to 9 years	5.8%	5.1%
10 to 14 years	6.4%	6.6%
15 to 19 years	7.2%	6.1%
20 to 24 years	6.4%	4.9%
25 to 34 years	11.0%	10.3%
35 to 44 years	13.6%	13.1%
45 to 54 years	17.0%	16.7%
55 to 59 years	7.3%	8.0%
60 to 64 years	6.2%	7.3%
65 to 74 years	7.5%	9.2%
75 to 84 years	4.4%	5.5%
85 years and over	1.8%	1.9%

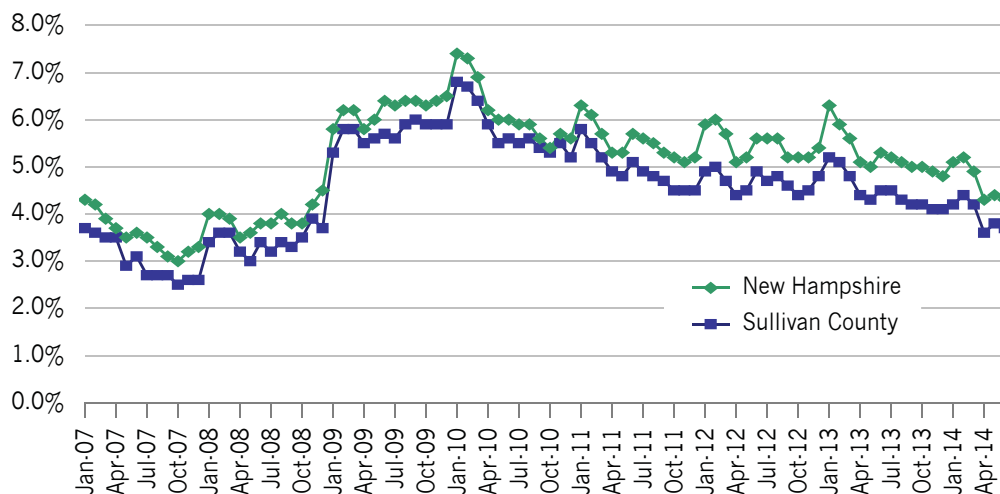
Source: U.S. Census Bureau, 2008-2012 ACS 5-Year Estimates

Labor Force⁹

Along with the second-smallest population, Sullivan County has the second-smallest labor force among New Hampshire’s counties, with a 2013 annual average civilian labor force of 22,920. The annual average number of employed residents in 2013 was 21,890, while the average number of unemployed residents was 1,030. Sullivan County’s unemployment rate — the number of unemployed residents divided by total labor force — was also the second-lowest in 2013, at 4.5 percent. Grafton County was slightly lower, with an unemployment rate of 4.3 percent for 2013.

On a monthly basis, the unemployment rate (not seasonally adjusted) for Sullivan County has followed a track similar to the statewide not seasonally adjusted rate, but is consistently lower. The January 2010 unemployment rate of 6.8 percent was the highest for Sullivan County in nearly 20 years. Since then, Sullivan County’s monthly unemployment rate has been trending steadily downward. The highest unemployment rate in available history was in January 1991, at 9.0 percent. The lowest rate was in November 1998, when the unemployment rate dropped to 1.9 percent. The June 2014 unemployment rate for Sullivan County was 3.7 percent; statewide, the not seasonally adjusted rate was 4.3 percent.

Unemployment Rate, Sullivan County and New Hampshire Not Seasonally Adjusted



⁹ Economic and Labor Market Information Bureau, NH Employment Security, 2013 Local Area Unemployment Statistics Report, Not Seasonally Adjusted. Benchmark Estimate (subject to change). 27 March 2014. <www.nhes.nh.gov/elmi/statistics/documents/2013-bm-la-us.pdf>.

Quarterly Workforce Indicators

The Quarterly Workforce Indicators (QWI) are a product of the Local Employment Dynamics (LED) Partnership and are possible because of an innovative system that merges data already collected from various sources. The state Labor Market Information (LMI) agencies supply key data from unemployment wage records and from businesses each quarter. The Census Bureau merges the data from state LMI agencies with current demographic information to produce the data found on the LED web site. By combining data from different administrative sources, censuses and surveys, the Census Bureau produces local employment information that was not available before.

The Census Bureau produces thirty labor force indicators, including total employment, measures of change such as job flow, new hires, and separations, and average earnings.

U.S. Census Bureau. 2013. Quarterly Workforce Indicators (QWI). Longitudinal-Employer Household Dynamics Program. <lehd.ces.census.gov/applications/help/qwi_online.html#!what_is_qwi_online>.

Industry Employment and Worker Age, 2012 Q4 – 2013 Q3

Sullivan County has a rich history of *Manufacturing*, as readily available sources of water power attracted manufacturing enterprises. A third of the municipalities in this county are located on the Connecticut River, and the Sugar River and the Cold River also provided prime sites for water-powered manufacturing. The *Manufacturing* sector is the largest employing sector in Sullivan County, and *Manufacturing* holds a larger share of total employment¹⁰ in this county than in any of New Hampshire’s counties. From the fourth quarter of 2012 through the third quarter of 2013, 21.4 percent of total employment was in the *Manufacturing* sector, whereas *Manufacturing* accounted for 10.8 percent of total employment statewide.¹¹

Table 3: Largest Industries* by Share of Employment, 2012 Q1-2012 Q4 Average¹²

Sullivan County	Employment	Percent	New Hampshire	Employment	Percent
Total	13,316	100.0%	Total	605,346	100.0%
Manufacturing	2,851	21.4%	Retail Trade	94,887	15.7%
Retail Trade	2,055	15.4%	Health Care and Social Assistance	90,046	14.9%
Educational Services	1,631	12.3%	Manufacturing	65,631	10.8%
Health Care and Social Assistance	1,569	11.8%	Educational Services	60,133	9.9%

*Includes employment at both private and government-owned establishments

Source: U.S. Census Bureau, Local Employment Dynamics Program, Quarterly Workforce Indicators.

10. Total employment includes employment at both privately-owned and state and local government-owned establishments.

11. US Census Bureau, Local Employment Dynamics Program, Quarterly Workforce Indicators, 2012 Q1-2012 Q4 Average.

12. Ibid.

Age Group Employment by Industry

Manufacturing is the top employing industry for Sullivan County workers in the working age groups, those from 25 to 64 years of age. Those aged 25 to 64 years are considered to be in the prime working years. Many potential labor force participants under age 25 are still in school or have not yet entered careers. Many workers age 65 and over have retired, though some continue to participate in the labor force.

Among those age 25 to 34 years, the largest share of workers is employed in *Manufacturing*, followed by *Retail trade*, *Healthcare and social assistance*, and *Educational services*. A little more than half, 56.7 percent, of Sullivan County workers in this age group are employed in these four industries.

The largest portion of workers in the next three older age groups are employed in the same four industries: *Manufacturing*, *Educational services*, *Healthcare and social assistance*, and *Retail trade*. Among Sullivan County workers age 35 to 44 years, 60.0 percent are employed in these four industries, and that share rises with each consecutive age group. Among workers age 45 to 54 years, 63.5 percent are employed in these four industries, and among workers age 55 to 64 years, 67.3 percent are employed in these industries.

Particularly interesting is the share of older workers employed in *Manufacturing*. Nearly a quarter of workers in the two older age groups — age 45 to 54 years and age 55 to 64 years — are employed in *Manufacturing*. This illustrates both the importance of that industry and the aging of the *Manufacturing* workforce in Sullivan County.

Table 4: Top Employing Industries by Age Group

Ages 25-34	Employment	Percent of Age Group
Manufacturing	444	19.4%
Retail trade	370	16.1%
Healthcare and social assistance	252	11.0%
Educational services	233	10.2%

Ages 35-44	Employment	Percent of Age Group
Manufacturing	533	21.4%
Educational services	337	13.5%
Healthcare and social assistance	320	12.8%
Retail trade	307	12.3%

Ages 45-54	Employment	Percent of Age Group
Manufacturing	762	24.6%
Educational services	427	13.8%
Retail trade	396	12.8%
Healthcare and social assistance	383	12.4%

Ages 55-64	Employment	Percent of Age Group
Manufacturing	671	25.2%
Educational services	442	16.6%
Healthcare and social assistance	340	12.8%
Retail trade	340	12.8%

Source: U.S. Census Bureau, Local Employment Dynamics Program, Quarterly Workforce Indicators.

Industry Employment by Age Group

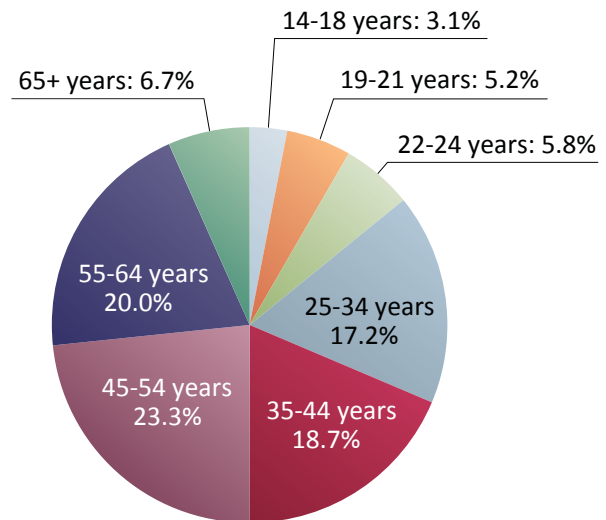
The following distributions are based on worker characteristics at the place of employment, not worker place of residence.

Total, All Industry Sectors

The share of workers for all industry sectors in Sullivan County clearly shows that the workers in the prime working years hold the largest share of jobs, with 79.2 percent of workers in those four age groups.

Not unexpectedly, the largest share of workers is age 45 to 54 years, followed by those age 55 to 64 years. The share of workers age 65 years and over is larger than the share of workers age 22 to 24 years. About half of Sullivan County workers are 45 years of age or older.

Total, All Industries



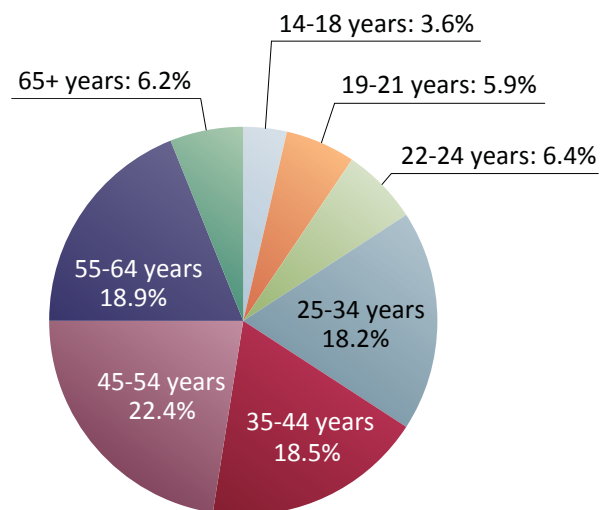
Source: U.S. Census Bureau, LED Program

Total Private

Private sector employment in Sullivan County has a slightly younger cast than employment in all industries combined (private plus government). In part this reflects the influence of *Retail trade*. This second-largest industry in Sullivan County, which claims about 15 percent of employment, draws almost 17 percent of its workers ages 14-18 years and 19-21 years. This share is about twice the share of employment in all industries for workers those ages.

As with employment overall (private plus government), the largest share of private industry workers falls in the 45-54 age group, again followed by those age 55 to 64 years. Private industries also have a slightly smaller share of workers in the prime working ages than for all industries combined, 77.9 percent compared to 79.2 percent. Again, this is partly due to a higher concentration of younger workers employed in the private retail industry.

Total Private



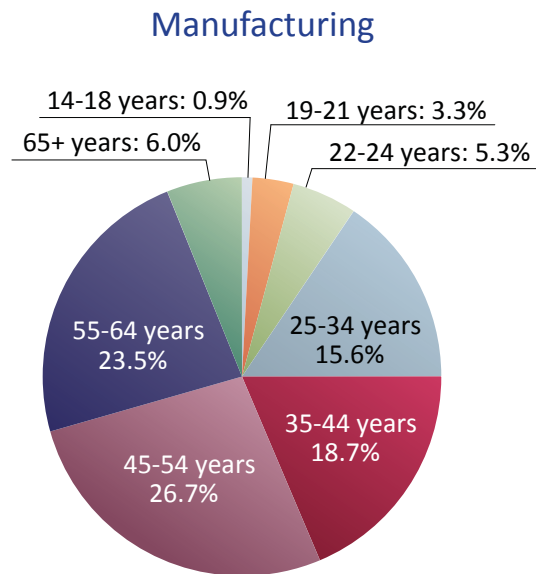
Source: U.S. Census Bureau, LED Program

Manufacturing

In this industry, about 84.5 percent of workers are age 25 to 64 years. Those age 45 to 54 years hold the largest share by far — 3.2 percentage points higher than those age 55 to 64 years, the next largest group. The share of workers age 45 to 54 years is a whopping 11.1 percentage points higher than those age 25 to 34 years, and 8.0 percentage points higher than those age 35 to 44 years.

The fact that workers age 45 and over represent well over half of the *Manufacturing* employment in Sullivan County shows one issue the industry is facing. A large share of jobs currently held by workers age 45 and over combined with slow job growth means fewer opportunities for younger workers to enter employment in the industry. When current workers retire, the portion of the local labor force with experience in

Manufacturing will be small, and employers may have difficulty finding experienced workers to replace retirees.



Source: U.S. Census Bureau, LED Program

Retail Trade

Employment by age group in this industry is far more equally distributed than in other industries. Those in the three age groups between 14 and 24 years hold about 24.5 percent of employment in *Retail trade*, a larger share than those age 45 to 54 years. This industry has the largest share of workers age 14 to 24 years in Sullivan County. For people entering the labor force, commonly on a part-time basis, *Retail trade* provides accessible employment opportunities.

About 69 percent of *Retail trade* workers in Sullivan County are age 25 to 64 years. This is one of the smaller shares of workers in this age range among all industries. The *Accommodation and food services* sector has the smallest share of workers age 25 to 64 years, 54.6 percent.



Source: U.S. Census Bureau, LED Program

Educational Services

Over half of Sullivan County employment in this industry sector is in two age groups: 45 to 54 years and 55 to 64 years. The *Educational services* sector may face an issue similar to *Manufacturing* in the future — as the current workforce begins to retire, there could be a shortage of experienced workers available to fill those positions.

The share of workers age 24 years and under is very small, but that is likely related to educational requirements for many workers in the *Educational services* industry sector. Teachers, counselors, school administrators, and librarians are some of the occupations in *Educational services* that usually require a Bachelor’s degree or higher level of education to qualify for certification and employment.

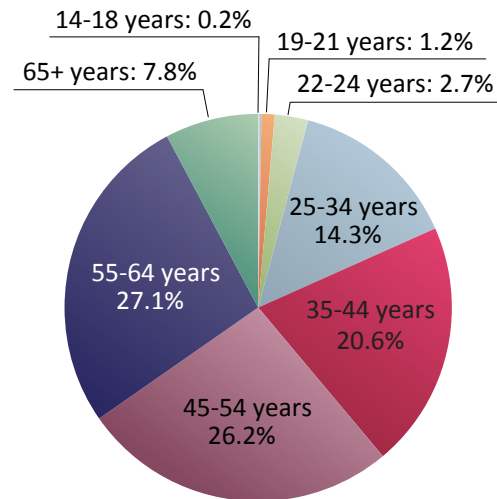
Educational services data include employment at state and local schools, as well as private primary, secondary, and postsecondary schools, and educational support services businesses.

Healthcare and Social Assistance

Nearly 83 percent of Sullivan County healthcare workers are in their prime working years, age 25 to 64 years. Similar to Educational services, many jobs commonly found in this industry require postsecondary education, and in addition, an occupational license is required for many positions. Thus, those under age 25 hold a much smaller share of employment, as they have not had the opportunity to complete required levels of education.

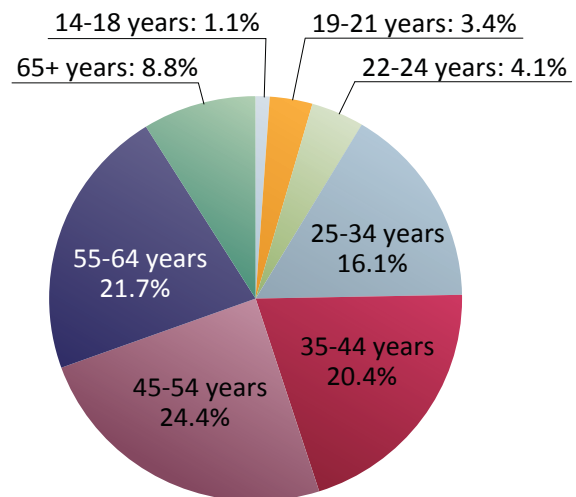
The share of workers ages 65 and older is slightly larger than that found in either Educational services or Manufacturing, but so is the share of workers ages 25 to 34 years. With a larger share of younger workers, this industry may potentially be less impacted by a retiring workforce and concerns over the availability of experienced workers in the future.

Educational Services



Source: U.S. Census Bureau, LED Program

Healthcare and Social Assistance



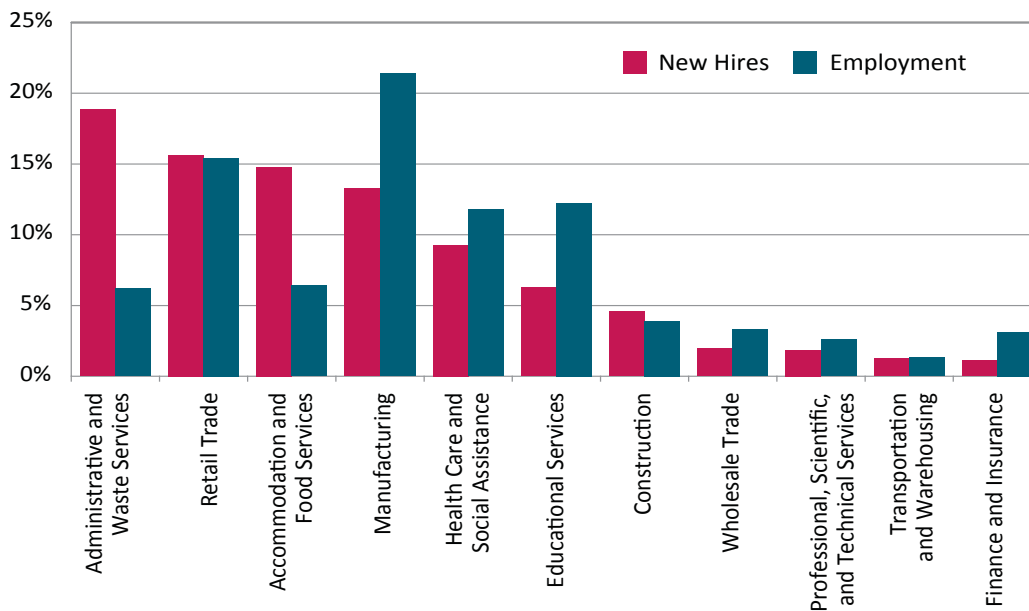
Source: U.S. Census Bureau, LED Program

New Hires

There were 1,776 new hires on average each quarter in Sullivan County for the four quarters ending with third quarter 2013. New hires represent job holders who started a new job in a specific quarter, but had not worked at the same business at any time in the previous four quarters. These data can be used to identify industries that are hiring, as well as the age of new hires selected for employment. Keep in mind, new hires data represent the number of workers with new jobs at business establishments in the area and do not directly represent residents. Additionally, hiring behaviors of business establishments do not necessarily indicate business growth, or an increase in the number of employees, as the business may simply be replacing workers who have left their employ.

New hires data by industry helps illustrate age patterns in industry hiring practices. For example, over these four quarters, the largest number of new hires in Sullivan County, about one of every five, was in the *Administrative and waste services* sector. Over a third (36.6 percent) of new hires in this sector were 24 years of age or younger, while over another 20 percent of new hires in this sector were age 25 to 34 years. That was slightly higher than the state-wide share of new hires for these two age groups in *Administrative and waste services*. Together, those under 35 years represented 58 percent of *Administrative and waste services* new hires in Sullivan County, compared to 55 percent of that industry’s new hires state-wide. Those ages 35 and older were 42 percent of

**Share of New Hires to Share of Employment
Selected Industries in Sullivan County 2012 Q4 - 2013 Q 3**



13. The *Administrative and waste services* sector includes business support activities such as office administrative services, facilities support services, employment services, business support services, travel arrangement and reservations, investigation and security services, services to buildings and dwellings, and waste collection, treatment, disposal, and remediation.

Sullivan County new hires in this industry. While *Administrative and waste services* accounted for almost 19 percent of Sullivan County new hires over these four quarters, the sector provided just over six percent of the county's employment.

Manufacturing, the largest employing industry in Sullivan County, had the fourth largest number of new hires during these four quarters. Over 13 percent of new hires in Sullivan County were in *Manufacturing*, while just fewer than five percent state-wide were in this industry. Workers age 45 years and over represented well over half of employment in *Manufacturing*. Yet over half of *Manufacturing* new hires were age 22 to 44, while barely one in four new hires was age 45 and over. This could indicate a positive trend of employers hiring some younger workers.

Accommodation and food services employment accounted for over six percent of total employment in Sullivan County, compared to almost nine percent state-wide. Even so, *Accommodation and food services* had the third highest number of new hires in the county, with about 15 percent. Well over half of new hires in the industry were 24 years or younger, and about a fifth were 25 to 34 years old. This industry employs an even larger share of workers less than 35 years of age than *Administrative and waste services*. In Sullivan County, about two-thirds of employment and four-fifths of new hires in this industry were under age 35.

Retail trade is unusual among the larger industry sectors because its shares of total employment and new hires are about equal. Over these four quarters *Retail trade* averaged 15.4 percent of employment in Sullivan County and 15.7 percent of new hires. However, there are marked differences between employment by age and new hires by age. Slightly under one quarter of workers were 24 years of age or under, while almost half of new hires were those ages. Conversely, over forty percent of workers were age 45 and older while less than one quarter of new hires were those ages.

Health care and social services had the fourth-highest level of employment (just under 12 percent) over the four-quarter time period, but the fifth highest share of new hires (just over nine percent). *Health care and social assistance* displays a significant difference in hiring patterns than *Retail trade*. Slightly less than one quarter of new hires in *Health care and social assistance* were in the 14 to 24 years age group, compared with twice that share in *Retail trade*; almost 12 percent of new hires in *Health care and social assistance* were in the 55 to 64 years age group, compared to just under eight percent in *Retail trade*. This further illustrates likely differences in educational requirements for many occupations in *Health care and social assistance* compared to those in *Retail trade*.

Educational services is the third largest employing sector in Sullivan County, with just over 12 percent of employment. This industry accounted for slightly more than six percent of new hires on average from the fourth quarter of 2012 through the third quarter of 2013. Interestingly, *Educational services* has a very low share of employment in the 22-24 age group, while it has among the highest share of new hires in that age group. This is perhaps indicative of young persons beginning careers in *Educational services* after completing baccalaureate degrees.

OnTheMap: 2011 Commuting Data

What is OnTheMap?

OnTheMap, a product of the U.S. Census Bureau’s Longitudinal Employer-Household Dynamics (LEHD) program, is an interactive tool that illustrates where workers are employed in relation to where they live. Jobs data depicted here are based on primary job counts, meaning the highest-paying job for a worker in the year. The primary job count is equal to the count of workers. Using primary job counts (instead of all job counts) avoids double-counting working persons, as the all job counts may include persons holding more than one job. OnTheMap data exclude self-employed workers.

OnTheMap has been developed through a unique partnership between the U.S. Census Bureau and partner states through the Local Employment Dynamics (LED) partnership.

Source: U.S. Census Bureau. 2013. OnTheMap Application. Longitudinal-Employer Household Dynamics Program. <onthemap.ces.census.gov>.

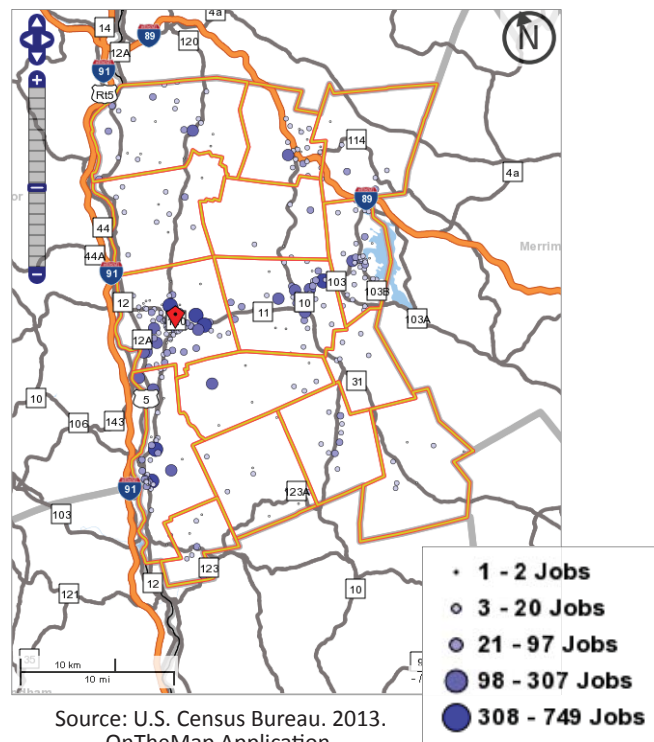
Working and Living in Sullivan County

Where do people work within Sullivan County?

Map 1 shows work locations in the county — locations where people work regardless of where they live. Each dot represents a count of jobs in that location, with larger, darker dots representing a higher number of jobs.

Work locations in this county are clearly aligned with transportation routes, with the majority of work locations along the Route 11 corridor between Newport and Claremont. Some larger work locations are scattered south down Route 12 into Charlestown, and another pocket of work locations sits just off Interstate 89 in Grantham. Smaller sites are sprinkled along Route 10 in Lempster.

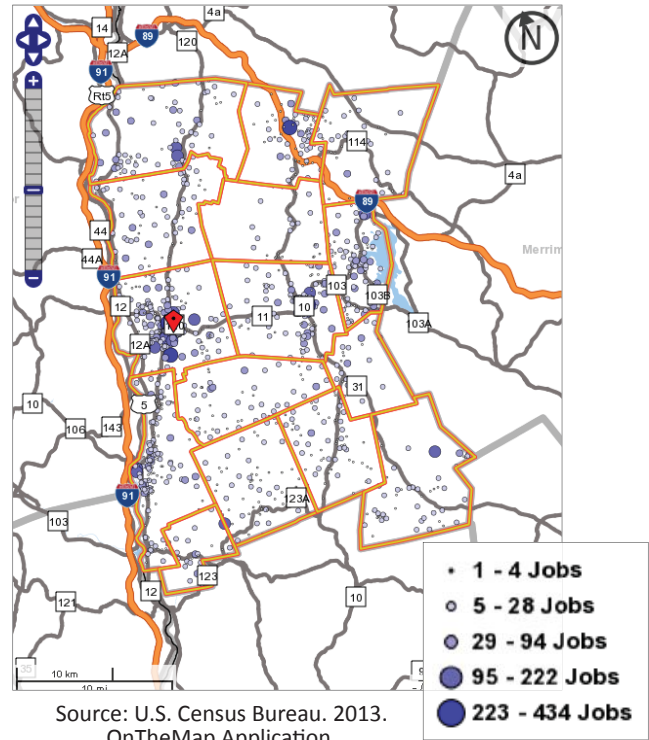
Map 1. Work Locations in Sullivan County



Where do working residents live in Sullivan County?

In Map 2, “jobs” are the count of job holders, distributed by residence. Residence locations for working residents of Sullivan County are more evenly distributed throughout the county’s 15 communities than are work locations. There are clusters of higher job holder counts seen in Claremont, Newport, Plainfield, Grantham, Sunapee, and Charlestown. These communities have the highest population within the county.

Map 2. Where Workers Live in Sullivan County

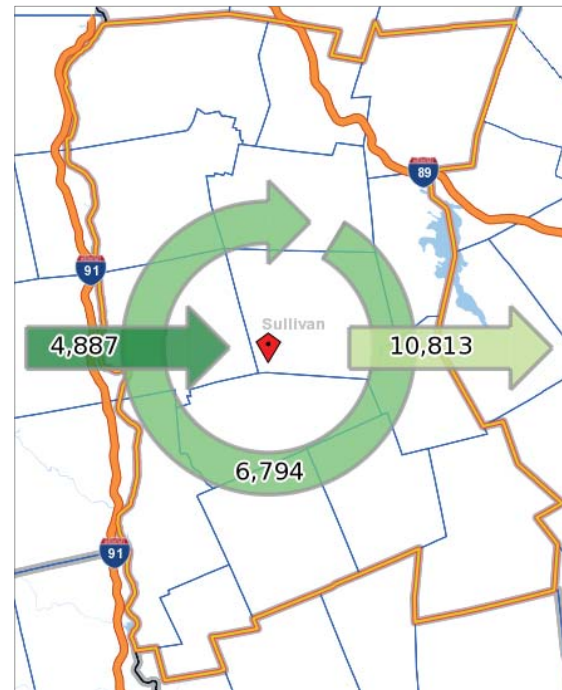


Commuter Inflow and Outflow

The previous maps illustrated locations in Sullivan County where people work and where workers live. These two concepts are not unrelated entities — they are connected by commuter data. Commuter data for a location can be viewed from two perspectives: where residents work, and where workers live. These data bring in a larger picture, showing not only persons who reside and work within a county, but also persons who live outside the county but work in the county, and persons who live in the county but work outside the county (data excludes the self-employed).

In 2011, there were 17,607 workers living in Sullivan County and 11,681 persons working in Sullivan County. In Graphic 1, the dark green arrow represents the 4,887 non-residents of Sullivan County who commuted into the county for work. The light green arrow represents the 10,813 Sullivan County residents who commuted out of the county for work. The circular arrow represents the 6,794 persons who commuted from home to work within Sullivan County.

Graphic 1: Sullivan County Commuter Inflow/Outflow



Source: U.S. Census Bureau. 2013 OnTheMap Application.

Sullivan County is a net exporter of workers — more residents commute out of the county to work than workers commute into the county. Among Sullivan County’s working residents, 38.5 percent commute to jobs in the county, while 61.5 percent commute out of the county for work. Among those working in Sullivan County, 58.1 percent are residents, while 41.9 percent commute into the county for work.

Self-Employed Workers

Others who live and/or work in Sullivan County are the self-employed, who are excluded from the above counts of job holders. There were about 3,370 nonemployer firms in Sullivan County according to the Census Bureau’s 2011 Nonemployer Statistics.¹³ One in five were in the *Construction* industry sector, largely *Specialty trade contractors*, offering plumbing, heating, air conditioning, electrical, or building finishing services. About 13 percent were in *Professional, scientific, and technical services*, such as architectural or engineering, accounting, computer systems design, or management services, and about 12 percent were in the *Other services* sector, including businesses such as automotive or appliance repair, and personal services such as hair and nail salons and dry-cleaning.

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 14. U.S. Census Bureau, Nonemployer Statistics. <www.census.gov/econ/nonemployer/>.

The Census Bureau defines a nonemployer firm as a business with no employees that has annual receipts of \$1,000 or more (\$1 or more in the construction industry), and is subject to federal income taxes. Most non-employers are self-employed individuals operating unincorporated businesses (known as sole proprietorships), which may or may not be the owner's principal source of income. The geographic location of each firm is determined by the business owner's mailing address, and is not necessarily the location at which business is conducted. Nonemployer businesses may not be the sole or primary source of income for the business owner, and thus individuals may be included in commuter data if they also hold job with a firm whose employees are covered by unemployment insurance.

Where Residents of Sullivan County Commute for Work

Map 3 shows job counts in the 25 communities where the largest share of Sullivan County residents travel to work. There are 17,607 residents of Sullivan County who commute to work (excluding the self-employed). Table 3 lists the 15 communities where the most Sullivan County residents work. Together, these 15 work destinations account for 69.1 percent of all Sullivan County working residents. Out of the top 15 work destinations, however, only five are in Sullivan County, accounting for 34.4 percent of job holders.

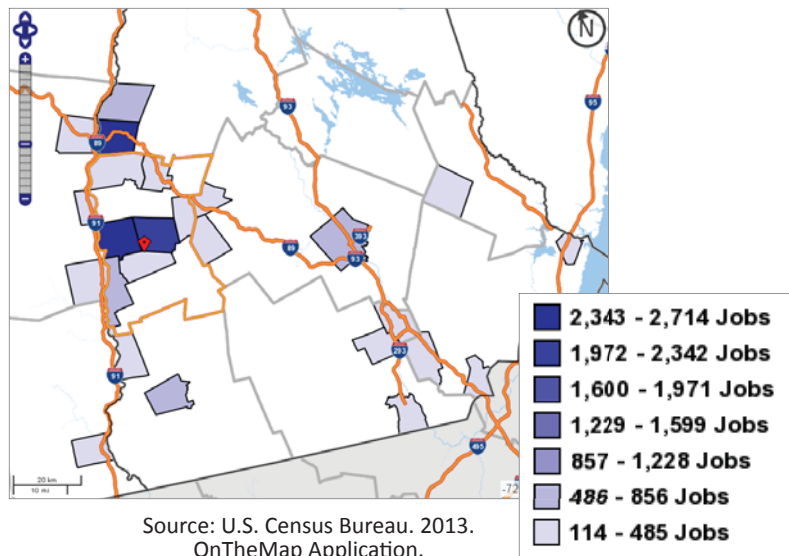
Among all Sullivan County working residents, 38.6 percent commute to a job in Sullivan County, 48.3 percent commute to some other New Hampshire county, while 13.2 percent travel out-of-state for work. Vermont is the work destination for 10.3 percent of Sullivan County job holders.

Table 3. Jobs Count by Work Destination for Sullivan County Residents

	Jobs Count	Share
Claremont NH	2,714	15.4%
Lebanon NH	2,463	14.0%
Newport NH	2,005	11.4%
Charlestown NH	826	4.7%
Concord NH	615	3.5%
Keene NH	516	2.9%
Hanover NH	509	2.9%
Hartford VT	424	2.4%
New London NH	386	2.2%
Manchester NH	361	2.1%
Sunapee NH	310	1.8%
Nashua NH	303	1.7%
Springfield VT	291	1.7%
Windsor VT	237	1.3%
Unity NH	209	1.2%
All other locations	5,438	30.8%

Communities in **BOLD** are in Sullivan County
 Source: U.S. Census Bureau. 2013. OnTheMap Application.

Map 3: Where Sullivan County Residents Work



Commuting from Place of Residence to Work – Distance and Direction

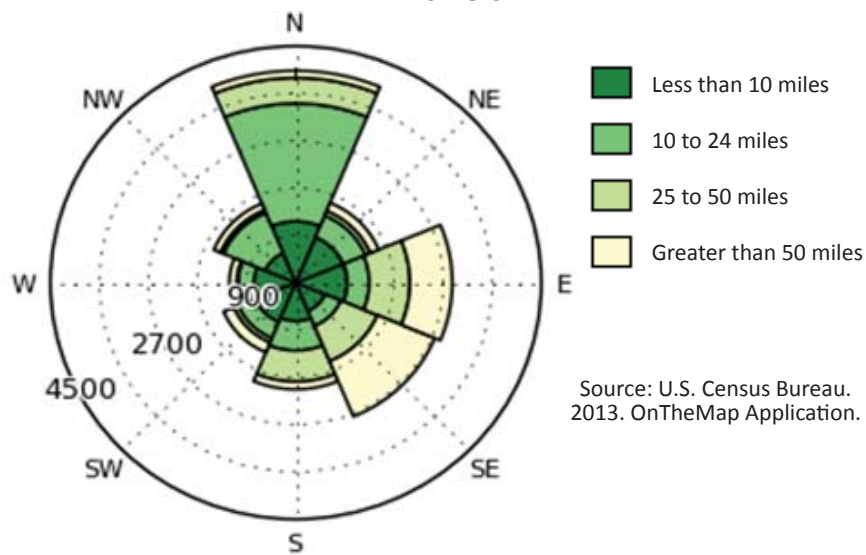
Map 3 highlighted the communities to which the majority of Sullivan County residents commute for work. Graphic 2 delves deeper into that commute, illustrating the distance and direction that residents travel in their commute.

The largest share of Sullivan County working residents travel less than ten miles to work — 37.3 percent of all workers drive this distance. The share of workers travelling this distance in each direction does not differ all that much, though the largest number of commuters in this group commute north.

Those who reside in Sullivan County travel primarily in three directions for work —north, east or southeast. These directions take workers to larger employment centers, toward Lebanon and Hanover to the north, and toward Concord and Manchester to the southeast. Workers also travel east toward Newport and New London. The largest share of Sullivan County working residents, 22.9 percent, travel to the north.

Among those travelling north to work, over half, 55.7 percent, commute 10 to 25 miles from home to work. In comparison, those travelling east or southeast are more likely to travel much further distances to work. Among those travelling east, 27.1 percent commute greater than 50 miles, while among those travelling southeast, 41.3 percent commute greater than 50 miles.

Graphic 2: Job Counts by Distance/Direction in 2011
All Workers



Source: U.S. Census Bureau. 2013. OnTheMap Application.

Where Persons Employed in Sullivan County Reside

The other view of commuting is the location where persons who are employed in Sullivan County travel to return home. Map 4 shows the count of job holders in the communities where persons who work in Sullivan County reside. There are 11,681 job holders working in Sullivan County (excluding the self-employed). The top 15 home destinations for Sullivan County workers are shown in Table 4. These 15 home destinations account for 62.3 percent of all job holders working in Sullivan County. Out of the top 15 home destinations for Sullivan County workers, 11 are in Sullivan County, accounting for 55.3 percent of workers.

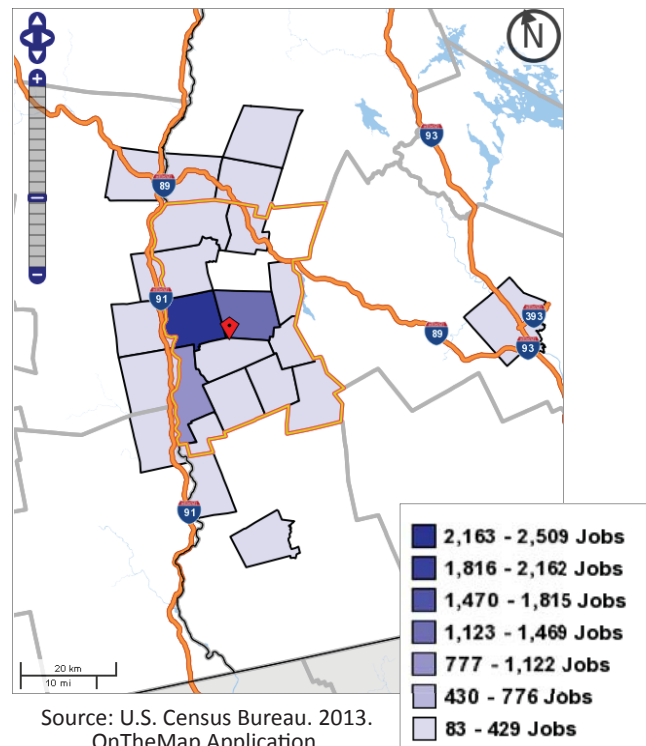
Among all Sullivan County workers, 58.2 percent reside in Sullivan County, 27.8 percent reside in some other New Hampshire county, and 14.0 percent reside out-of-state. Vermont is home for 11.4 percent of Sullivan County workers.

Table 4:
Jobs Count by Home Destination
for Sullivan County Workers

	Jobs Count	Share
Claremont NH	2,509	21.5%
Newport NH	1,384	11.8%
Charlestown NH	834	7.1%
Sunapee NH	413	3.5%
Springfield VT	320	2.7%
Plainfield NH	289	2.5%
Unity NH	277	2.4%
Walpole NH	231	2.0%
Grantham NH	187	1.6%
Cornish NH	166	1.4%
Lebanon NH	139	1.2%
Washington NH	137	1.2%
Acworth NH	131	1.1%
Lempster NH	131	1.1%
Enfield NH	124	1.1%
All other locations	4,409	37.7%

Communities in **BOLD** are in Sullivan County
Source: U.S. Census Bureau. 2013. OnTheMap Application.

Map 4: Home Destinations for Sullivan County Workers

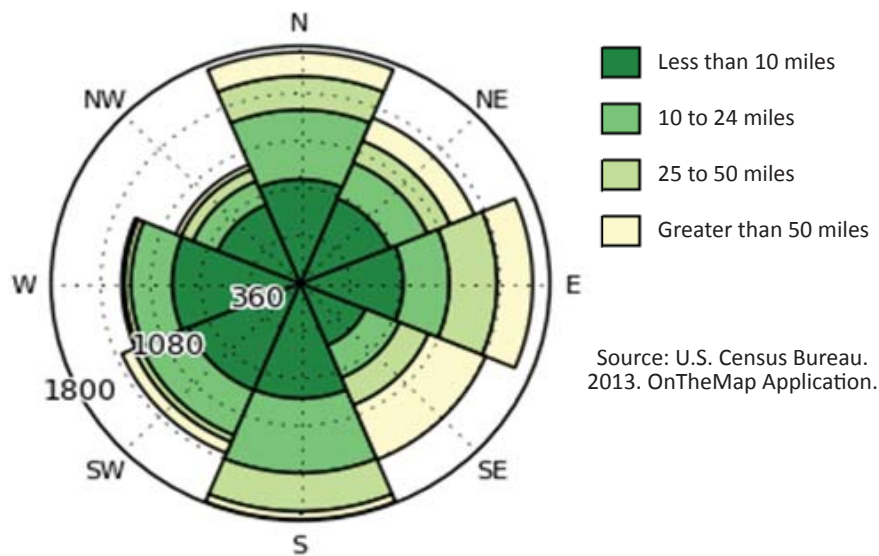


Commuting from Place of Work to Home – Distance and Direction

Graphic 3 illustrates the distance and direction travelled by persons who are employed in Sullivan County. The graphic shows that those working in Sullivan County come from all directions. The majority of those working in Sullivan County, 51.9 percent, commute less than ten miles from work to home. These workers are likely to both live and work within the county. Another 24.4 percent of workers commute 10 to 24 miles from work to home. Though workers commute to work in Sullivan County from all directions, over three-fourths travel less than 25 miles.

Among Sullivan County workers commuting 25 to 50 miles to work, the largest number reside to the east of their place of work. Those commuting from work to home in the south easterly direction are most likely to travel greater than 50 miles. About a third of workers who travel this direction go that far.

Graphic 3: Job Counts by Distance/Direction in 2011
All Workers



Employment Projections 2010 to 2020¹⁴

What does the future hold for Sullivan County? While there is no crystal ball, a prediction of future employment levels is available. Long-term projections of employment by industry and occupation covering a ten-year time span are estimated biennially for New Hampshire statewide and the ten counties. The latest round of projections estimated employment for 2010 and projected employment to 2020 for 110 industries and more than 700 occupations.¹⁵ These data are projections of employment, and are considered an “educated guess,” but are not cast in stone.

From 2010 to 2020, New Hampshire is expected to grow by 10.4 percent, an average of about one percent each year. Estimated employment is expected to increase from 662,146 to 730,710, a gain of 68,564 jobs. Sullivan County is projected to grow more slowly, by 4.0 percent, and estimated employment is expected to increase from 14,478 in 2010 to 15,063 in 2020, an increase of 585 jobs. About a quarter of the jobs in Sullivan County are in goods-producing industries, such as *Construction* and *Manufacturing*. Sullivan County has a higher share of employment in goods-producing industries than any of New Hampshire’s ten counties.

Industry Employment Projections, 2010 - 2020

Just over half of the 585 projected new jobs in Sullivan County will be in two industry sectors: *Manufacturing* is expected to gain 102 jobs, and *Healthcare and social assistance* is expected to gain 204 jobs. The *Healthcare and social assistance* sector is projected to have the second-highest rate of growth, 13.7 percent, while the *Manufacturing* sector is projected to grow by 3.8 percent over the ten-year period. Sullivan County’s rate of growth in *Manufacturing* is the highest projected rate of growth in *Manufacturing* among the counties.

The industry sector with the highest rate of growth is *Arts, entertainment, and recreation*, projected to increase by 23.6 percent. Employment is expected to increase from 127 to 157, adding 30 jobs over the ten-year period. *Educational services*, including public schools, is expected to gain 53 new jobs, a 2.9 percent increase. The outlook in *Professional, technical, and scientific services* is also positive, with a projected growth rate of 11.7 percent, and 36 new jobs gained.

Occupational Employment Projections, 2010 - 2020

To project occupational employment, staffing patterns from the New Hampshire Occupational Employment Statistics program are applied to industry employment, taking into account national change factors and occupational trends, and adding an estimated percentage of self-employed workers. Average annual job openings from new job growth and from replacement needs — job openings created due to a retirement or persons moving to other jobs — are also projected.

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15. New Hampshire Employment Security, Economic and Labor Market Information Bureau. *New Hampshire Employment Projections by County, 2010 – 2020*. June 2013. <<http://www.nhes.nh.gov/elmi/products/proj.htm>>.

16. Projections are based on historical trends and current data, assume no major change in technology, productivity, or state or federal government policy, and are made without considering business cycle fluctuations, possible natural disasters, or other catastrophic events.

Between 2010 and 2020, a total of 406 average annual openings are projected for Sullivan County. Four out of every five of these openings will be due to replacement needs. The four-out-of-five ratio of replacements openings to total openings is roughly the same for Belknap, Carroll, and Cheshire Counties.

Employment levels in Sullivan County are relatively low, thus the percent change in employment is not necessarily synonymous with expected job openings. There are no occupational groups that have both the highest expected percent change and the highest number of average annual job openings projected. Table 5 lists the occupational groups with the highest percent change between 2010 and 2020, and the highest number of average annual job openings.

Healthcare support occupations is

the only occupational group expected to have more average annual new job openings than average annual replacement job openings – 11 new jobs to 7 replacement job openings. All other occupational groups are expected to have more job openings due to replacement needs than new job openings.

**Table 5. Occupational Projections,
2010 - 2020, Sullivan County**

Top Percent Change	
Healthcare Support Occupations	21.6%
Personal Care and Service Occupations	13.0%
Architecture and Engineering Occupations	9.9%
Computer and Mathematical Occupations	9.2%
Life, Physical, and Social Science Occupations	9.1%

Top Average Annual Openings	
Sales and Related Occupations	57
Office and Administrative Support Occupations	52
Production Occupations	52
Education, Training, and Library Occupations	40
Food Preparation and Serving Related Occupations	32

Source: New Hampshire Employment Security,
Economic and Labor Market Information Bureau

Summary

Sullivan County has the second-smallest population among New Hampshire's ten counties. Like many locations in the northeast and nationally, the county's population is aging. The population in Sullivan County, with a median age of 44.2 years, is older than the state as a whole, which has a median age of 41.1 years. A likely contributor to the higher median age is the proportion of residents age 45 to 54 years and younger, which is smaller than that of New Hampshire statewide. At the same time, the proportion of residents age 55 to 59 years and older is larger than that of the state.

For about 37 percent of Sullivan County's population, a high school diploma is the highest level of educational attainment, a share second only to Coös County. Even so, the county typically has one of the lowest unemployment rates, averaging 4.8 percent in 2012, second lowest among the counties.

Sullivan County is a net exporter of workers — 48 percent of working residents commute to another New Hampshire county and 13 percent commute out of state to work, while 38 percent work within the county. Those who work in Sullivan County are more likely to be residents as well, with 58 percent of workers also living the county.

Half of the job holders who work in Sullivan County are age 45 to 54 years or older. The *Manufacturing* sector had a higher share of workers in older age groups than other industries. *Manufacturing* is the largest employing industry in the county, providing over 20 percent of private sector jobs.

Over the next ten years, employment growth in Sullivan County will likely be slower than the state as a whole, but is expected to increase by four percent. The *Manufacturing* and *Healthcare and social assistance* industry sectors are projected to add the most jobs between 2010 and 2020. Sales, Office and administration, and Production occupations are projected to have the highest number of job openings annually.

Today, Sullivan County continues in its long history as a prime location for manufacturing. It also maintains traditional land use in agriculture and forests. With workers that are experienced in manufacturing and the large share of residents that currently commute out of the county for work, Sullivan County presents opportunity for business investment and growth.



The products and services of the NHES Economic and Labor Market Information Bureau result from the cooperation and teamwork of the entire ELMI Bureau staff: Michael Argiropolis, Gail Clay, Robert Cote, Bruce DeMay, Katrina Evans, Donna Finlay, John Gallison, Eleanor Goodbread, Debra Jodoin, Anita Josten, Donald Kelley, Annette Nielsen, Bruce Olinsky, Martin Page, Elisabeth Richardson, Anthony Scott, Peter Sgrulloni, and Jim Smith.

The following are available in hard copy from the Economic and Labor Market Information Bureau of New Hampshire Employment Security. Many of these publications are also available at our Web site: <www.nhes.nh.gov/elmi>

Green Economy: The Current Status of Green Jobs in New Hampshire
Licensed, Certified, and Registered Occupations in New Hampshire
New Hampshire Job Outlook and Locator Occupations by Industry
Vital Signs: Economic and Social Indicators for New Hampshire
New Hampshire Occupational Employment and Wages
User's Guide to Workforce and Career Information
Local Area Unemployment Statistics
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The following are only available at our Web site: <www.nhes.nh.gov/elmi>

Occupational Employment and Wage Data for 16 Sub-state Areas
Occupational Employment and Wage Data for the Ten Counties
New Hampshire Unemployment Insurance Historical Data
High Tech Employment in New Hampshire
Economic Conditions in New Hampshire
New Hampshire Community Profiles
New Hampshire Affirmative Action
Firms by Size in New Hampshire

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