



**LEBANON ECONOMIC DEVELOPMENT COMMISSION
OCTOBER 27, 2021 - 4:00 PM
COUNCIL CHAMBERS, CITY HALL OR
REMOTE VIA VIRTUAL PLATFORM
LEBANONNH.GOV/LIVE**

-
- 1. Call to Order**
 - 2. Approval of Minutes**
 - A. September 22, 2021
 - 3. New Business**
 - A. Discussion: set meeting date/time for combined November/December meeting
 - B. Business Retention and Home-Grown Success
 - 4. Future Agenda Items**
 - A. Inventory Opportunities/Determine What's Missing
 - B. Apply Success of Lebanon Downtown District Elsewhere
 - C. Think Regionally
 - 5. Other Business**
 - A. NH Employment Security - September 2021 report
 - 6. Next Meeting Date**
 - A. TBD
 - 7. Adjournment**

Meetings are open for in-person and remote attendance. Members of the public that wish to attend remotely may do so by going to LebanonNH.gov/Live where you will find instructions on how to enter the meeting. Members of the public will be able to participate and ask questions through the City's virtual platform or by phone. Please note: Should technical difficulties occur during the meeting that disrupts virtual or phone connection(s), the meeting will continue without remote access capabilities.

**Agenda
Economic Development Commission
October 27, 2021**

**Agenda Item #2A
Approval of Minutes**

September 22, 2021

DRAFT



**MINUTES
ECONOMIC DEVELOPMENT COMMISSION
AND DOWNTOWN TIF ADVISORY BOARD –
JOINT MEETING
WEDNESDAY, SEPTEMBER 22, 2021 – 4:00PM
City Hall – Council Chambers
51 North Park Street, Lebanon**

1. CALL TO ORDER:

- The September 22, 2021 Joint Economic Development Commission and Downtown TIF Advisory Board meeting was called to order at 4:00 PM
- Present on the Commission: Dan Nash, Johanna Cicotte, Bill Dunn (Chair), David Newlove, Kevin Purcell, Andy Key [4:05pm]
- TIF members present: Victoria Smith, Barry Schuster (Chair), Chip Fleischer, George Sykes [4:07pm]
- Staff Present: Planning and Development Director David Brooks, and City Manager Shaun Mulholland

2. APPROVAL OF MINUTES:

A. August 25, 2021

Motion by David Newlove to approve the minutes of August 25, 2021 as presented. Second by Dan Nash. Minutes approved unanimously.

Bill Dunn thanked Dan Nash for sending him an email notification regarding a *Business NH Magazine* front page story that two of the best companies in NH to work for are located in Lebanon.

3. NEW BUSINESS:

- A. Discussion: Redevelopment of lower parking lots; Potential Creation of Downtown Subcommittee – Bill Dunn noted that the Spencer Street project is moving along. He noted that the EDC would like to invite the TIF Board into conversations regarding future redevelopment in the City.

David Brooks presented a brief summary of the 2016 Downtown Vision Plan and Tunnel Assessment. The Vision Plan highlighted opportunities for further redevelopment in the downtown area, including in areas currently used for public parking. This redevelopment will likely be much more complex than the Spencer Street project. Some of the surface parking might need to be replaced with structured parking. The intent is for the Commission and the TIF Advisory Board to discuss further implementation of the visioning study.

David Brooks explained that the new owner of the Lebanon Village Market property is now willing to participate in redevelopment discussions, and conversations could be had regarding what might be appropriate and possible in that location and on the city-owned property next door.

David Brooks stated that three options for the tunnel were presented as part of the Visioning Study. The study mainly identified opportunities. The City used the information from the study and associated discussions and elected to rehabilitate the tunnel and now continues to move forward in the implementation process.

David Brooks stated that the two parking areas around the City Hall and mall are city-owned. It was discussed that the City needs to maintain control on some of these parking areas, and from there the end result can be managed.

Dan Nash noted that the Fire Department requires structured parking to be elevated over the 100-year flood plain. Thus, the parking areas will need to be raised to reach this. Currently, the parking lot is approximately 10-15' from the river. New development will likely need to be moved 50' away to comply with the Shoreland Protection requirements.

David Brooks stated that it could be possible for the City to pursue Shoreland Urban Exemption through NHDES, for areas along rivers with historical development patterns that could exempt them from the shoreland requirements. Dan Nash suggested that any exemption should include surrounding properties, and not just City parcels. David Brooks explained that, if the City submits an application for this, it will include any properties that meet the criteria.

The groups discussed the creation of a subcommittee. David Brooks explained that the groups could develop an RFP that includes the parameters that the City wants to control and otherwise allow interested parties to submit proposals.

Kevin Purcell noted that he would like to see progress begin on Spencer Street before seeking an RFP for this project. Bill Dunn agreed but noted that this process could begin by deciding what is important for all involved. It was discussed that beginning this project doesn't need to wait until the Spencer Street project is fully underway. Bill Dunn stated that doing these two projects concurrently might be beneficial.

It was decided that all members of the EDC and TIF would be interested in participating in the subcommittee process to discuss the criteria for this project. The joint committees will try to meet every other month, starting in January (January 26, 2022), during the normal EDC meeting time. The groups decided to put together wish lists for David Brooks to compile for the next meeting.

- B. Discussion: Downtown Parking Deck Conversation – Dan Nash quickly reviewed his suggestion for a structured parking area using the terrain already in place so that no ramps are needed. He noted that the parking could be designed to accommodate future potential loads on top.

Clifton Below gave a presentation regarding possibilities for structured parking in the lower parking lots. He suggested that some tax revenue from the TIF District could be used to pay for the public parking portion of the structure.

4. FUTURE AGENDA ITEMS:

- A. Inventory Opportunities/Determine What's Missing

B. Business Retention and Home-Grown Success

Kevin Purcell suggested inventorying the City's existing businesses and discussing how to keep them in place. A working group could identify employers and determine how best to keep them. Bill Dunn stated that this should be kept as an agenda item for further discussion.

C. Apply Success of Lebanon Downtown District Elsewhere

D. Think Regionally

5. **NEXT MEETING DATE:** October 27, 2021

6. **OTHER BUSINESS:**

David Brooks stated that the City was contacted by the NH Department of Business and Economic Affairs regarding recertifying the City's six economic revitalization zones by December.

7. **ADJOURNMENT.**

- ***Motion by Dan Nash to adjourn the EDC meeting, Second by David Newlove. Motion approved unanimously. Meeting adjourned at 5:00 PM.***
- ***Motion by Barry Schuster to adjourn the TIF meeting, Second by George Sykes. Motion approved unanimously. Meeting adjourned at 5:00 PM.***

Respectfully submitted,

Kristan Patenaude

Agenda
Economic Development Commission
October 27, 2021

Agenda Item #5A
Other Business

NH Employment Security - September 2021 report

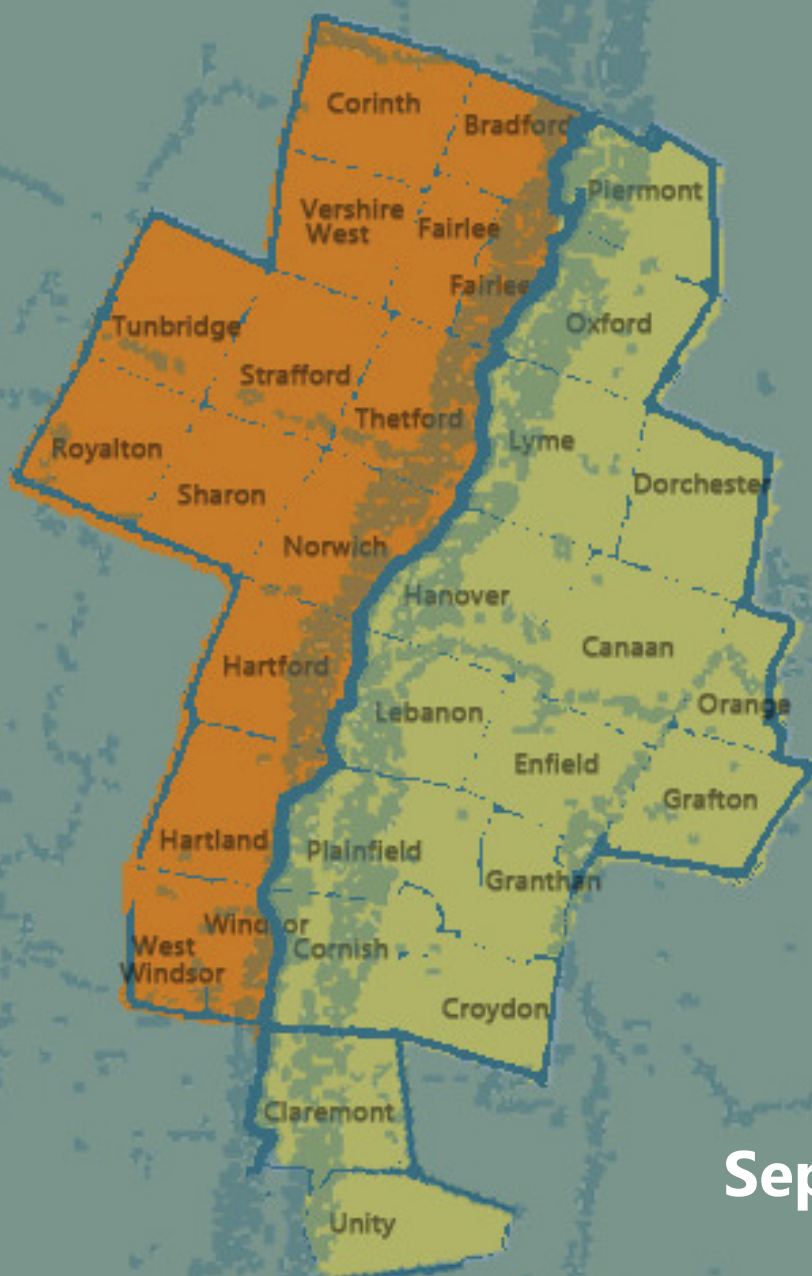


FYI-

Distributed @
10-27-2021 EDC
Meeting

The Upper Valley On-The-Map Analysis

A Profile of the Lebanon NH-VT and Claremont NH Micropolitan NECTAs



September 2021

The Upper Valley On-The-Map Analysis

A Profile of the Lebanon NH-VT and Claremont NH Micropolitan NECTAs



State of New Hampshire

Christopher T. Sununu, Governor

New Hampshire Employment Security

George N. Copadis, Commissioner

Economic and Labor Market Information Bureau

Brian J. Gottlob, Director

September 2021

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The Upper Valley On-The-Map Analysis
A Profile of the Lebanon NH-VT and Claremont NH Micropolitan NECTAs

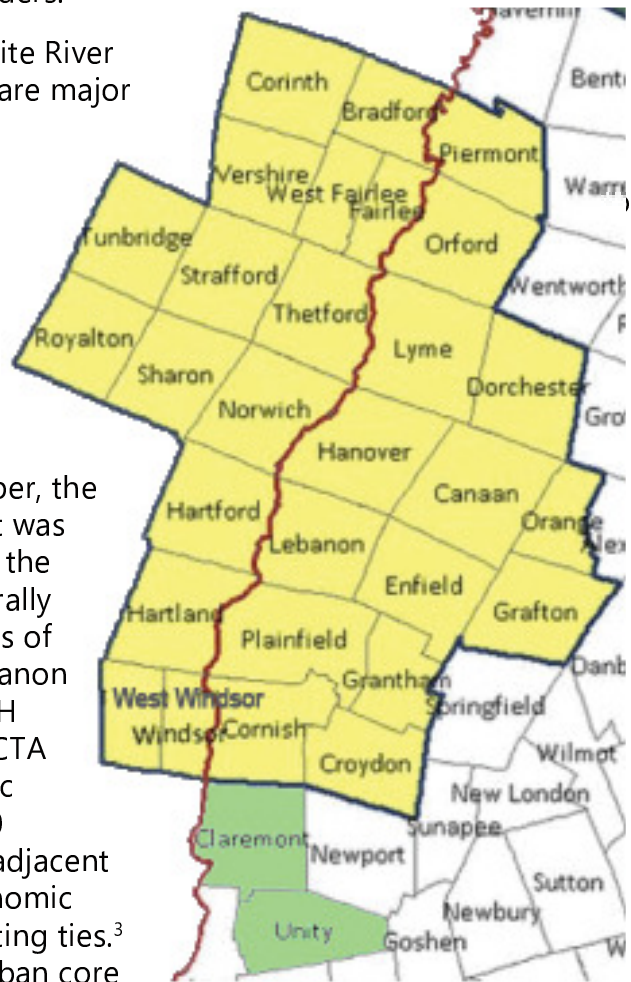
The Upper Valley On-The-Map Analysis

The Upper Valley consists of towns on either side of the Connecticut River, centered around the towns of Lebanon NH and Hanover NH on the east side of the river, and Hartford VT and Norwich VT on the west side. Although the Connecticut River dividing the valley defines the border between New Hampshire and Vermont, creating not just a physical barrier but a political one as well, the towns on both sides of the river are closely connected; the region even has two schools districts that cross state borders.

Dartmouth-Hitchcock Medical Center and the White River Junction Veterans Administration Medical Center are major employers in the region, giving the Upper Valley a concentration in healthcare services-related employment. The Upper Valley is also home to Ivy League Dartmouth College, as well as several advanced manufacturing firms, including Hypertherm, Timken Aerospace, and Fuji Dimatix.¹

The exact borders of the Upper Valley were never officially defined. The name was originally used to describe the circulation area for the local newspaper, the *Valley News*, when it was founded in the 1950s.² It was called "Upper" in comparison to the circulation of the *Claremont Daily Eagle*, whose circulation was generally downriver from the Upper Valley. For the purposes of this analysis, the region will be defined as the Lebanon NH-VT Micropolitan NECTA and the Claremont NH Micropolitan NECTA together. A Micropolitan NECTA (New England City and Town Area) is a geographic entity based on an urban cluster of at least 10,000 population but less than 50,000 population, plus adjacent territory that has a high degree of social and economic integration with the core as measured by commuting ties.³ For the Lebanon NH-VT Micropolitan Area, the urban core is the city of Lebanon, with a population of 13,623 in 2019, and surrounding territory that stretches from Croydon NH and Windsor VT in the south up to Piermont NH and Bradford VT in the north.

As the second largest community in the region, Claremont is actually considered the urban cluster at the center of its own two-municipality micropolitan area, the Claremont NH Micropolitan NECTA. The city of Claremont, with a 2019 population of 12,977, along with the town of Unity NH, are defined as separate NECTA, showing that their integration with the



¹ Data Axle

² Hanson, Alex, "Defining the Upper Valley: Dartmouth Geography Researcher Seeks the Public's Input," *Valley News*, Dec 16, 2016. <https://www.vnews.com/Researcher-Garrett-Nelson-asks-the-public-to-define-the-Upper-Valley-6919810>.

³ U.S. Office of Management and Budget, 2010 *Standards for Delineating Metropolitan and Micropolitan Statistical Areas*. <https://www.govinfo.gov/content/pkg/FR-2010-06-28/pdf/2010-15605.pdf>.

The Upper Valley On-The-Map Analysis

rest of the Upper Valley is not quite as strong as the integration with each other. Part of this has to do with Claremont's location on the very southern edge of the Upper Valley. While the Lebanon Micropolitan Area encompasses two interstates (I-89 and I-91), two U.S. highways (US 5 and US 4), as well as multiple state routes and local roads, the Claremont Micropolitan Area encompasses just state routes and local roads, and only NH Route 103 flows east-west. Commuters must cross into Vermont or travel north to Lebanon to readily access an interstate. In addition to Claremont's ties with the Upper Valley, it also has social and economic integration with nearby towns outside of the region. Still, Claremont is strongly tied to the Upper Valley. Thousands of workers who live in Claremont are employed elsewhere in the Upper Valley, and workers from those towns commute to Claremont in large numbers as well.

This analysis will use the U.S. Census Bureau's OnTheMap tool to examine the characteristics of the workers who live and/or work in the Upper Valley. This tool shows how the towns of the Upper Valley make up one economically connected region. The Upper Valley as a whole, as well as select towns within the region, will be examined.

Upper Valley by The Numbers	
Population:	99,435
Median Age ⁴	45.7
Median Age in New Hampshire:	42.9
Median Age in Vermont:	42.9
2020 Unemployment Rate (Annual Average) ⁵	
Upper Valley Unemployment Rate	4.3%
New Hampshire Unemployment Rate	6.7%
Vermont Unemployment Rate	5.6%

OnTheMap is an online mapping and reporting application that shows where workers are employed and where they live. It also provides data about worker characteristics, including worker age, earnings, industry, sex, race and educational attainment. OnTheMap was developed through a unique partnership between the U.S. Census Bureau and its Local Employment Dynamics (LED) partner states. Unless stated otherwise, data presented in this article are based on the LEHD Origin Destination Employment Statistics (LODES) data from 2018. Employment figures used by OnTheMap are based on the U.S. Census Bureau's Beginning of Quarter Employment measure. These individuals were employed by the same employer during two consecutive quarters, in this case the first and second quarters of 2018. All jobs discussed are primary jobs, so an individual holding more than one job is only counted once. In cases where an individual holds more than one job, the job with the highest earnings is considered to be the primary job.

OnTheMap is available online at: <https://onthemap.ces.census.gov/>

⁴ U.S. Census Bureau, American Community Survey 2015-2019. For median age data, the "Upper Valley" refers to the Lebanon NH-VT Micropolitan Statistical Area, an area that includes all of Grafton County NH, Sullivan County NH, Orange County VT, and Windsor County VT. It is a little more than twice the population of the Upper Valley as otherwise defined in this paper.

⁵ U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics.

The Upper Valley On-The-Map Analysis

Profile of the Upper Valley

Over 99,000 people lived in the Upper Valley in 2019. Compared to the rest of New Hampshire and Vermont, residents were older, with a median age of 45.7 years, nearly three years older than the median age of either state as a whole.

The region has long had one of the lowest unemployment rates among New Hampshire's labor market areas, with rates consistently lower than the New Hampshire and Vermont statewide rates.

Roughly 43,000 residents of the Upper Valley held a primary job in 2018.⁶ Among Upper Valley residents, 28,600 also worked in the region, and 14,800 worked outside of the region. An additional 23,300 workers lived outside of the Upper Valley, and commuted in for work, bringing the total number of primary jobs in the region to 52,000 jobs.

	2015-2019 ACS 5-Year Estimates - Total Population	Working Residents	Total Jobs Located in Town	Ratio of Number of Jobs in Town to Working Residents
Upper Valley	99,435	43,449	51,925	1.20
Lebanon	13,623	7,122	18,729	2.63
Claremont	12,977	6,286	5,052	0.80
Hanover	11,467	3,449	8,999	2.61
Enfield	4,545	2,328	725	0.31
Canaan	3,920	1,990	648	0.33
Grantham	2,945	967	346	0.36
Plainfield	2,555	961	562	0.58
Lyme	1,852	679	366	0.54
Cornish	1,783	670	91	0.14
Unity	1,613	713	328	0.46
Orford	1,444	589	269	0.46
Grafton	1,362	587	40	0.07
Piermont	868	395	42	0.11
Croydon	863	228	82	0.36
Dorchester	401	140	12	0.09
Orange	264	163	1	0.01
New Hampshire	1,348,124	646,537	602,085	0.93
Hartford	9,643	4,458	9,003	2.02
Windsor	3,392	1,831	1,305	0.71
Hartland	3,466	1,418	446	0.31
Norwich	3,339	1,589	949	0.60
Royalton	2,843	1,076	1,041	0.97
Bradford	2,713	1,243	1,147	0.92
Thetford	2,551	1,159	581	0.50
Sharon	1,437	520	161	0.31
Corinth	1,508	629	112	0.18
Tunbridge	1,225	506	146	0.29
Strafford	1,055	377	134	0.36
West Windsor	1,207	415	126	0.30
Fairlee	994	437	368	0.84
Vershire	686	219	69	0.32
West Fairlee	894	305	45	0.15
Vermont	624,313	275,411	275,067	1.00

⁶ Primary jobs allocate one job to each job holder. In cases where an individual holds more than one jobs, the jobs with the highest earnings is considered the primary job.

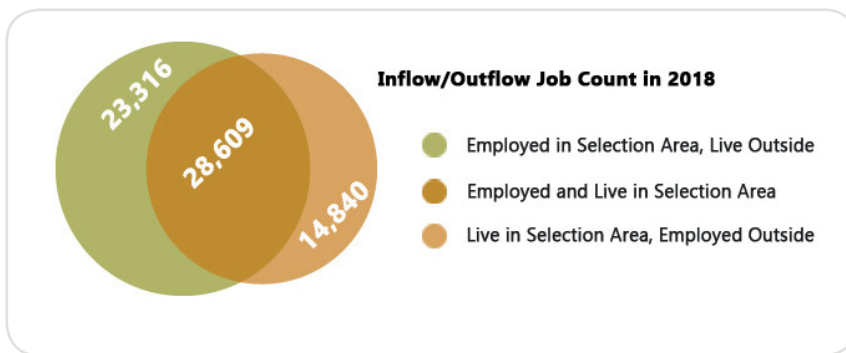
The Upper Valley On-The-Map Analysis

Lebanon, Claremont, Hanover, and Hartford were the largest municipalities in the Upper Valley, with a combined population of nearly 48,000 residents. Lebanon, Hanover, and Hartford made up the employment center for the region, with more jobs located in these municipalities than

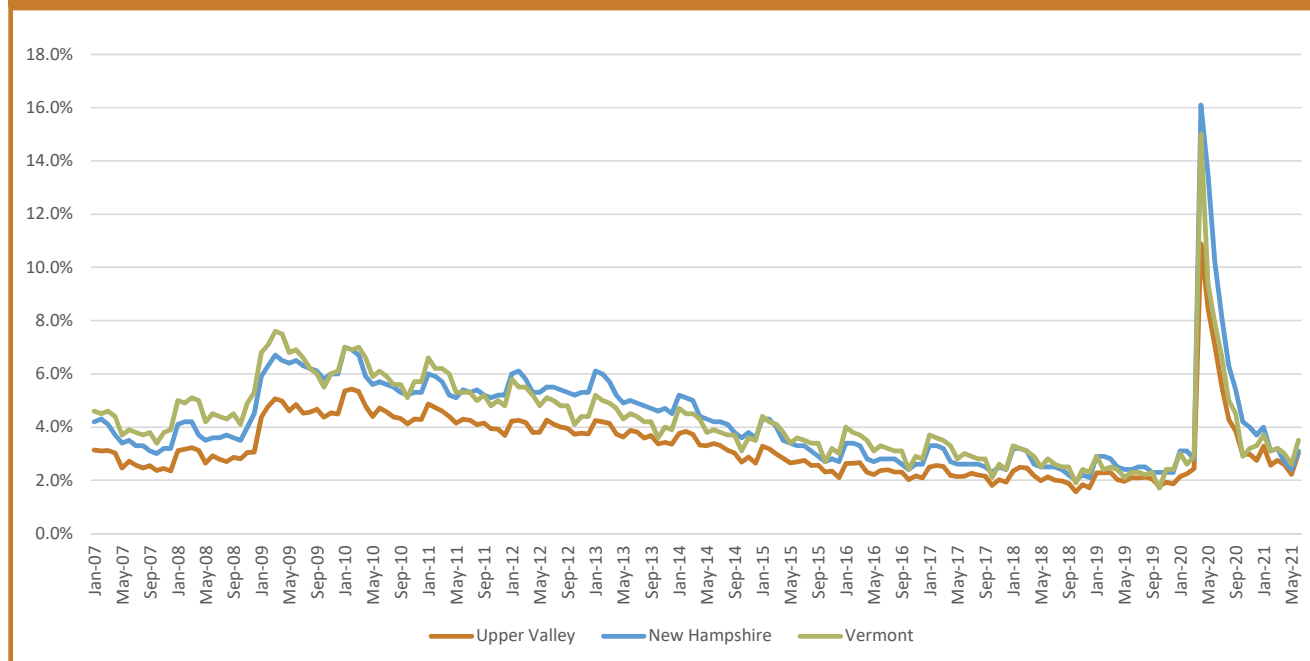
working residents. More than 70 percent of primary jobs in the Upper Valley were located in these three municipalities. Outside of Lebanon, Hanover and Hartford, jobs tended to be located along major transportation routes, particularly I-91 and US-5, which run north-south along the Vermont side of the Connecticut River. Most of the larger highways and interstates in the Upper Valley converge in Lebanon and Hartford, another reason these municipalities are the commercial center of the region.

The New Hampshire side of the Upper Valley had a larger population than the Vermont side. There were around 25,000 more residents living in the New Hampshire side than in the Vermont side. Employment was even more concentrated on the New Hampshire side of the valley. Over 36,000 individuals worked on the New Hampshire side of the region, while 15,000 worked on the Vermont side.

Roughly 5,300 residents of the Vermont side of the Upper Valley commuted to the New Hampshire side, while only around 1,900 workers commuted from the New Hampshire side to Vermont.



Unemployment Rates, 2007-2021

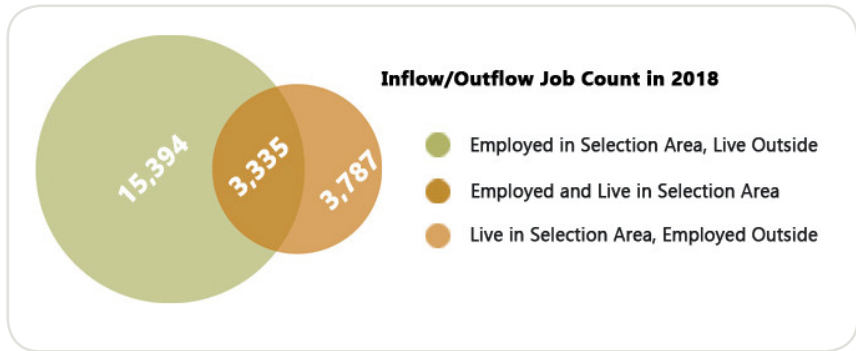


The Upper Valley On-The-Map Analysis

Lebanon NH

Living in Lebanon

- There were 7,122 Lebanon residents who were primary jobholders in 2018.⁷
- Lebanon residents most commonly worked in the following locations:
 - In town (3,335 Lebanon residents, 46.8 percent)
 - Hanover NH (1,576 Lebanon residents, 22.1 percent)
 - Hartford VT (461 Lebanon residents, 6.5 percent)
- Among Lebanon's working residents, 60.6 percent earned \$3,333 or more per month (or \$40,000 annually). In New Hampshire and Vermont overall, 53.4 percent of workers earned more than \$3,333 per month.
- Earnings varied greatly based on industry. Among jobholders in the educational services sector, 77.6 percent earned wages of \$3,333 per month or more, while only 17.1 percent of accommodation and food services workers did.
- The largest share of residents worked in the following industry sectors:
 - Health care and social assistance (2,047 Lebanon residents, 28.7 percent)
 - Educational services⁸ (1,418 Lebanon residents, 19.9 percent)
 - Retail trade (696 Lebanon residents, 9.8 percent)
 - Manufacturing (576 Lebanon residents, 8.1 percent)
- Among jobholders age 29 or older who lived in Lebanon, 37.4 percent held a Bachelor's degree or higher. An additional 29.6 percent held an Associate's degree or had completed some college education.
- Just over half of Lebanon resident jobholders, 51 percent, were age 30 to 54; 27 percent were age 55 or older and 22 percent were age 29 or younger.⁹
- Median household income in Lebanon was \$67,698.¹⁰



⁷ All data for working residents excludes the self-employed

⁸ Job counts for Educational Services include both public- and private-sector employment

⁹ Because educational attainment is dynamic for younger populations, OnTheMap only provides data for the Educational Attainment characteristic for workers age 30 or older

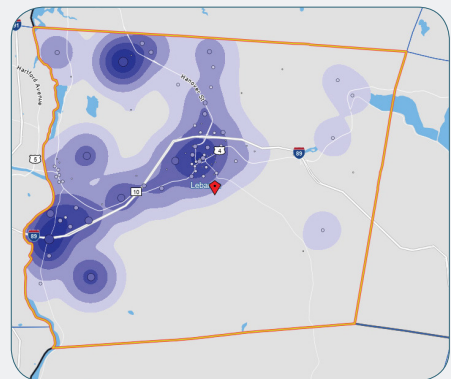
¹⁰ U.S. Census Bureau, American Community Survey 2015-2019

The Upper Valley On-The-Map Analysis

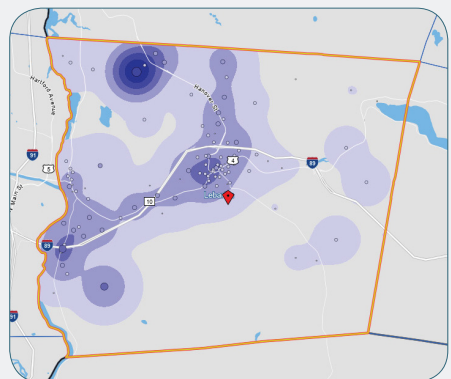
Working in Lebanon

- There were 18,729 primary jobs in Lebanon in 2018.
- Workers commuted to Lebanon from the following locations:
 - In Lebanon (3,335 residents, 17.8 percent)
 - Hartford VT (1,033 Hartford residents working in Lebanon, 5.5 percent)
 - Enfield NH (937 Enfield residents working in Lebanon, 5.0 percent)
 - Claremont NH (937 Claremont residents working in Lebanon, 5.0 percent)
- Although most workers who commuted to Lebanon lived in nearby towns, workers commuted to Lebanon from all over New Hampshire, including the Manchester and Concord areas, and as far away as Hampton and Berlin.
- Just over 60 percent of workers in Lebanon earned \$3,333 or more per month (\$40,000 annually).
- About 70 percent of those working in Lebanon were employed in the following three industries:
 - Health care and social assistance (8,518 workers, 45.5 percent)
 - Retail trade (2,176 workers, 11.6 percent)
 - Manufacturing (2,072 workers, 11.1 percent)

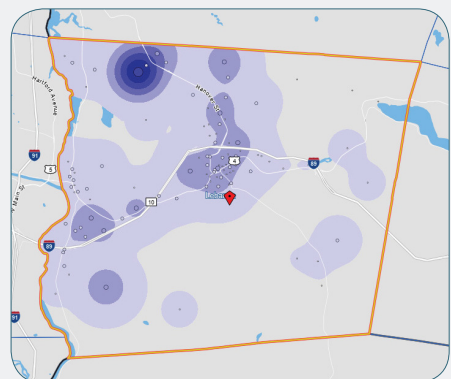
Location of Jobs in Lebanon by Earnings



Less than \$1,250 per month



Between \$1,250 and \$3,333 per month



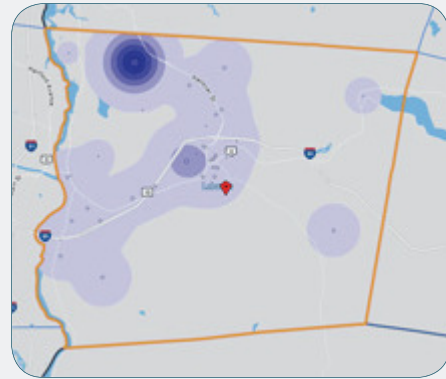
More than \$3,333 per month

The Upper Valley On-The-Map Analysis

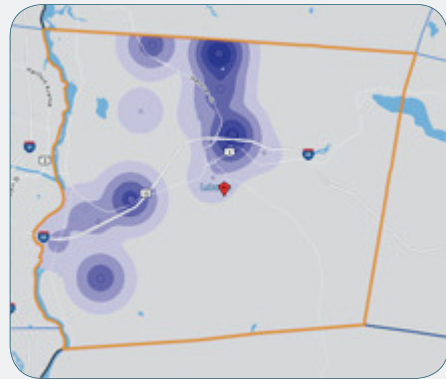
- Although only 11.2 percent of workers earned less than \$1,250 per month (\$15,000 annually), 32.4 percent of workers in retail trade and accommodation and food services earned less than \$1,250 per month.
 - Working 40 hours per week at New Hampshire's minimum wage would result in earnings of \$15,834 annually, so workers in this cohort were likely working less than 40 hours per week.
- Lebanon is home to Dartmouth-Hitchcock Medical Center, the only academic medical center and only Level I Trauma Center in New Hampshire. It is the largest employer in the Upper Valley, and one of the largest employers in New Hampshire. As a result of DHMC's presence, health care and social assistance jobs were three times more concentrated in Lebanon than in the state as a whole (45.5 percent of jobs in Lebanon vs. 15.0 percent in New Hampshire).
- Jobholders in the health care and social assistance sector comprised the largest group of workers in each of the following three wage categories: below \$1,250 monthly, between \$1,251 and \$3,333 monthly, and greater than \$3,333 monthly. This reflects the many types of jobs available in this sector, as well as the variation in the number of hours worked by those employed in the industry.
- Among jobholders age 29 or older working in Lebanon, 35.2 percent held a Bachelor's degree or higher. An additional 31.4 percent held an Associate's degree or had completed some college education.

Health care and social assistance jobs in Lebanon were heavily concentrated in a small area in the northwest section of the city. Manufacturing jobs were heavily concentrated in a northern section of Lebanon, as well as a couple locations in the west and southwest of the city. Retail trade jobs were most heavily concentrated in the west side of the city, near I-89.

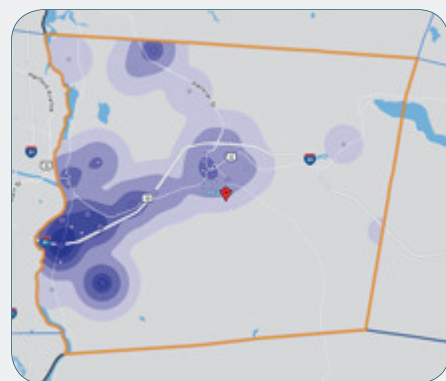
Employment Concentration by Industry



Health Care and Social Assistance Jobs



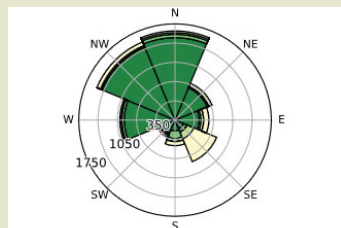
Manufacturing Jobs



Retail Trade Jobs

The Upper Valley On-The-Map Analysis

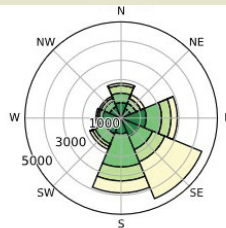
Job Counts by Distance/Direction in 2018 All Workers



Jobs by Distance - Home Census Block to Work Census Block

	2018	
	Count	Share
Total Primary Jobs	7,122	100.0%
Less than 10 miles	5,554	78.0%
10 to 24 miles	406	5.7%
25 to 50 miles	317	4.5%
Greater than 50 miles	845	11.9%

Distance and Direction
from Home to Work for
Residents of Lebanon



Jobs by Distance - Work Census Block to Home Census Block

	2018	
	Count	Share
Total Primary Jobs	18,729	100.0%
Less than 10 miles	6,947	37.1%
10 to 24 miles	5,175	27.6%
25 to 50 miles	2,942	15.7%
Greater than 50 miles	3,665	19.6%

Distance and Direction
from Work to Home
for Workers Employed
in Lebanon

Distance/Direction to and from Work in Lebanon

More than three quarters of working residents of Lebanon commuted less than ten miles.

Commuting in the opposite direction, less than 40 percent of those working in Lebanon commuted less than ten miles. This reflects the fact Lebanon, along with neighboring Hanover and Hartford VT, made up the employment center of the region, and residents of Lebanon did not need to travel far to access the majority of the Upper Valley's employment opportunities.

Those commuting to jobs in Lebanon included just over

3,300 Lebanon residents, as well as workers who commuted from further away in the Upper Valley, or from out of the region entirely. Almost 20 percent of workers employed in Lebanon commuted more than 50 miles, well beyond the boundaries of the Upper Valley.

Those working in Lebanon tended to commute from locations south, southeast, and east of Lebanon. Many of those commuting more than 50 miles came from the southeast, from the direction of Concord, Manchester, Nashua, and surrounding communities, where the majority of New Hampshire's population resides.

Most employed residents of Lebanon commuted either north or northwest. A majority of residents commuted either to the northwest corner of Lebanon, or to Hanover, located just north of Lebanon. Most of those who commuted more than 50 miles commuted southeast.

Overall

Lebanon had the largest population in the Upper Valley, and is one of two cities in the region. There were more jobs located in Lebanon than any other municipality in the Upper Valley. For every working resident of Lebanon, there were more than 2 ½ jobs located in the city.

The difference between working residents and jobs illustrates the difference in job concentration between the urban center of the Upper Valley and the surrounding towns. Jobs in the Upper Valley were concentrated in the urban center of the region, Lebanon, Hanover and Hartford; each of these communities had more jobs than employed residents. Outside of that center, every other town in the region had fewer jobs than employed residents, often by a significant margin. Enfield NH, for example, had 0.31 jobs for every employed resident.

The Upper Valley On-The-Map Analysis

Although there were a number of large employers in Lebanon, Dartmouth-Hitchcock Medical Center was the largest, and thus the workforce in Lebanon was heavily concentrated in the health care and social assistance industry. Location quotient, a ratio that measures an area's employment in an industry, relative to a reference area, shows how concentrated health care and social assistance jobs are in Lebanon. A location quotient greater than 1.0 means an area has a heavier concentration of employment in an industry than the reference area. Compared to New Hampshire and Vermont overall, Lebanon has a location quotient of 2.9 for health care and social assistance employment, meaning there are 2.9 times more health care and social assistance jobs per capita in Lebanon than in New Hampshire and Vermont (45.5 percent compared to 15.8 percent). Health care and social assistance represented a large number of jobs in every earnings category, from less than \$1,250 per month to greater than \$3,333 per month.

In Lebanon, 37.4 percent of employed residents age 29 or older had a bachelor's degree or more advanced degree, slightly higher than in the Upper Valley overall, where 34.1 percent of employed residents age 29 or older had a bachelor's degree or more advanced degree.

Although Upper Valley residents were older than New Hampshire and Vermont overall, with a median age of 45.7 years, the median age in Lebanon was 38.7 years.¹¹ In Lebanon, 20.3 percent of residents were between 25 and 34 years of age, a much higher percentage than the Upper Valley as a whole, where 12.9 percent of residents were age 25 to 34. Lebanon also had fewer residents age 55 to 74 years, 22.8 percent, than the Upper Valley overall, in which 26.1 percent of residents were age 55 to 74.

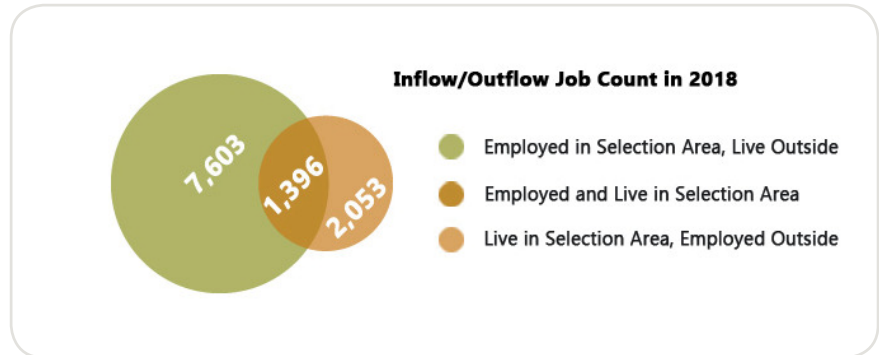
¹¹ U.S. Census Bureau, American Community Survey 2015-2019

The Upper Valley On-The-Map Analysis

Hanover NH

Living in Hanover

- There were 3,449 Hanover residents who were primary jobholders in 2018.
- Hanover residents most commonly worked in the following locations:
 - In Hanover (1,396 residents, 40.5 percent)
 - Lebanon NH (844 Hanover residents, 24.5 percent)
 - Hartford VT (138 Hanover residents, 4.0 percent)
- Among Hanover's working residents, 71.3 percent earned \$3,333 or more per month (or \$40,000 annually). In New Hampshire and Vermont overall, 53.4 percent of workers earned more than \$3,333 per month.
- Earnings varied greatly based on industry. In the educational services sector, 84 percent of workers earned wages of \$3,333 per month or more, while only 28 percent of accommodation and food services workers did.
- The largest share of residents worked in the following industry sectors:
 - Educational services (1,147 Hanover residents, 33.3 percent)
 - Health care and social assistance (830 Hanover residents, 24.1 percent)
 - Retail trade (215 Hanover residents, 6.2 percent)
 - Professional, scientific and technical services (211 Hanover residents, 6.1 percent)
 - Accommodation and food services (202 Hanover residents, 5.9 percent)
- Among individuals age 29 or older residing in Hanover, 43.0 percent held a Bachelor's degree or higher. An additional 27.8 percent held an Associate's degree or had completed some college education.
- Slightly more than half of Hanover's working residents, 55 percent, were age 30 to 54, and 31 percent were age 55 or older. Only 15 percent were age 29 or younger.
- Median household income in Hanover was \$137,344.

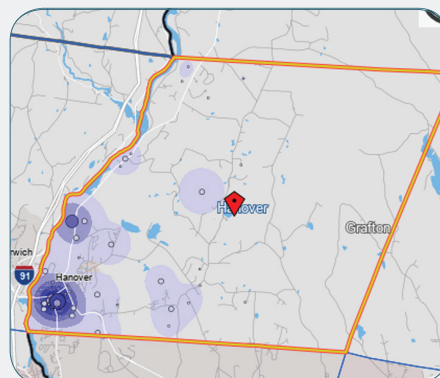


The Upper Valley On-The-Map Analysis

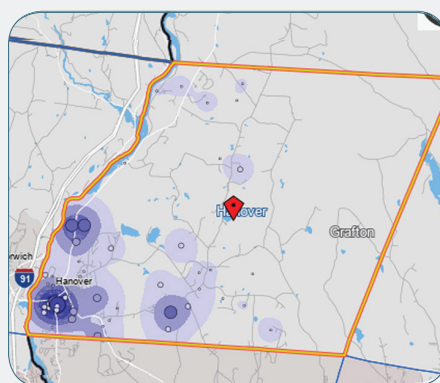
Working in Hanover

- There were 8,999 primary jobs in Hanover in 2018.
- Workers commuted to Hanover from the following locations:
 - Lebanon NH (1,576 Lebanon residents worked in Hanover, 17.5 percent)
 - In Hanover (1,396 residents, 15.5 percent)
 - Hartford VT (693 Hartford residents worked in Hanover, 7.7 percent)
 - Norwich VT (491 Norwich residents worked in Hanover, 5.5 percent)
- Most workers who commuted to Hanover came from the Upper Valley, but workers also commuted further distances, including from Keene NH and Nashua NH. There were 2,800 workers who commuted to Hanover from Vermont.
- Among Hanover jobholders, 72 percent earned \$3,333 or more per month (\$40,000 annually)
- Over 80 percent of Hanover's workers were employed in the following industries:
 - Educational services (5,532 workers, 61.5 percent)
 - Health care and social assistance (717 workers, 8.0 percent)
 - Manufacturing (616 workers, 6.8 percent)
 - Accommodation and food services (611 workers, 6.8 percent)

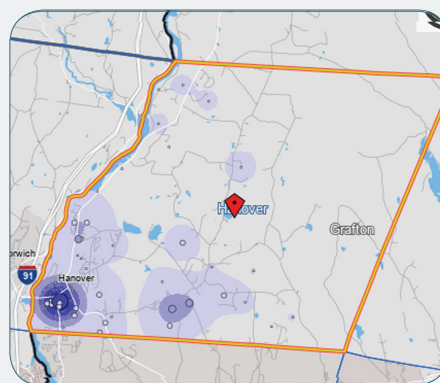
Location of Jobs in Hanover by Earnings



Less than \$1,250 per month



Between \$1,250 and \$3,333 per month



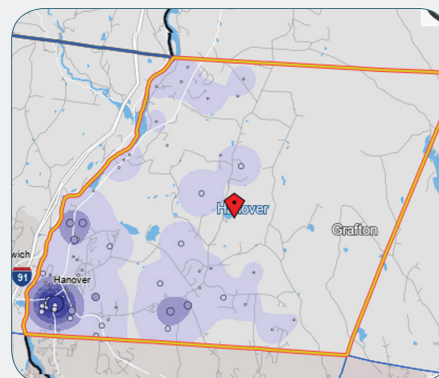
More than \$3,333 per month

The Upper Valley On-The-Map Analysis

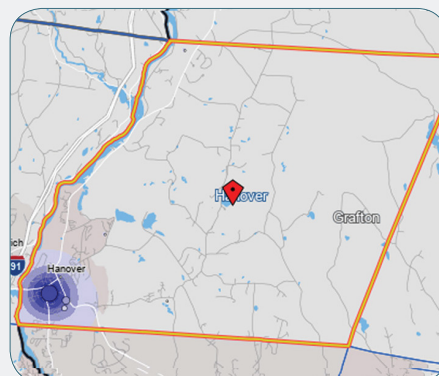
- Although only 11.4 percent of workers earned less than \$1,250 per month (\$15,000 annually), 30.0 percent of workers in retail trade and accommodation and food services were in that earnings category.
 - Working 40 hours per week at New Hampshire's minimum wage would result in earnings of \$15,834 annually, so workers in this cohort were likely working less than 40 hours per week.
- Hanover is home to Dartmouth College, an Ivy League college, and one of the largest employers in New Hampshire. As a result of Dartmouth's presence, educational services jobs in Hanover had a location quotient of 5.8 compared to New Hampshire and Vermont overall. (61.5 percent of jobs in Hanover vs. 10.6 percent of jobs in New Hampshire).
- Jobholders in the educational services sector comprised the largest group of workers in each of the three wage categories: below \$1,250 monthly, between \$1,251 and \$3,333 monthly, and greater than \$3,333 monthly. This reflects the many types of jobs available in this sector, as well as the variation in the number of hours worked by those employed in the industry.
- Among individuals age 29 or older working in Hanover, 44.0 percent held a Bachelor's degree or higher. An additional 27.2 percent held an Associate's degree or had completed some college education.

Most jobs in Hanover, particularly educational services jobs, were concentrated in the southwest corner of the town. Manufacturing jobs were an exception, with jobs concentrated in two areas of the town, one in the south and one in the west.

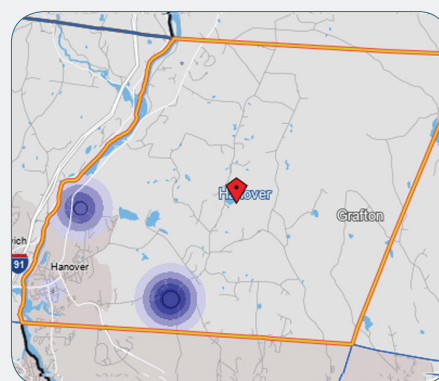
Employment Concentration by Industry



All Jobs Located in Hanover



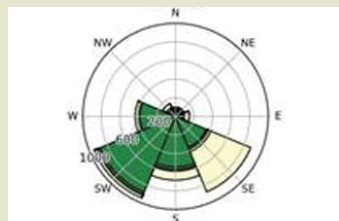
Educational Services Jobs



Manufacturing Jobs

The Upper Valley On-The-Map Analysis

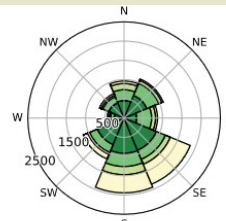
Job Counts by Distance/Direction in 2018 All Workers



Jobs by Distance - Home Census Block to Work Census Block

	2018 Count	Share
Total Primary Jobs	3,449	100.0%
Less than 10 miles	2,461	71.4%
10 to 24 miles	120	3.5%
25 to 50 miles	117	3.4%
Greater than 50 miles	751	21.8%

Distance and Direction
from Home to Work for
Residents of Hanover



Jobs by Distance - Work Census Block to Home Census Block

	2018 Count	Share
Total Primary Jobs	8,999	100.0%
Less than 10 miles	4,684	52.1%
10 to 24 miles	2,086	23.2%
25 to 50 miles	835	9.3%
Greater than 50 miles	1,394	15.5%

Distance and Direction
from Work to Home
for Workers Employed
in Hanover

Distance/Direction to and from Work in Hanover

Over 70 percent of Hanover's working residents commuted less than ten miles.

A little over half of those commuting to work in Hanover travelled less than ten miles.

Like Lebanon, Hanover is part of the employment center of the Upper Valley, and residents were more likely to have access to employment opportunities nearby.

Those working in Hanover included nearly 1,500 Hanover residents, as well as 6,400 workers who commuted from elsewhere in the Upper Valley,

and 2,600 commuters from outside of the region. Among jobholders working in Hanover, 15.5 percent commuted more than 50 miles. Most travelled from either the southeast, from Concord, Manchester, and Nashua, or from the south, from Keene.

Most jobholders who lived in Hanover commuted southwest, generally in the direction of either the southwestern corner of Hanover, towards Lebanon, or just over the Connecticut River into Hartford VT. Just over 20 percent of employed residents of Hanover commuted more than 50 miles, mostly to the southeast, in the direction of Concord, Manchester, and Nashua.

Overall

Hanover's population was the third largest in the Upper Valley, behind Lebanon and Claremont. Only 30 percent of Hanover residents were primary jobholders, a relatively low percentage compared to 44 percent in the Upper Valley overall. This was likely due to college students living in Hanover, many of whom were not in the labor force. Hanover residents aged 29 or younger accounted for only 14.7 percent of jobholders, 5.2 percentage points lower than the Upper Valley overall.

Although relatively few residents were employed, Hanover was part of the employment hub for the Upper Valley, and, with the exception of Lebanon, more jobs were located in Hanover than any other community in the Upper Valley. For every working Hanover resident, there were 2.6 jobs located in the community.

The Upper Valley On-The-Map Analysis

Dartmouth College's presence in a town of only 11,500 residents impacts the town's demographics significantly. With so many college students living in Hanover, the median age was 24.5 years, more than 20 years younger than the rest of the Upper Valley. In addition, residents of Hanover over age 29 were more likely to have a Bachelor's or more advanced degree than residents of the Upper Valley overall. In Hanover, 44.0 percent of residents over age 29 had a Bachelor's or more advanced degree, while in the Upper Valley, 34.1 percent had a Bachelor's or more advanced degree.

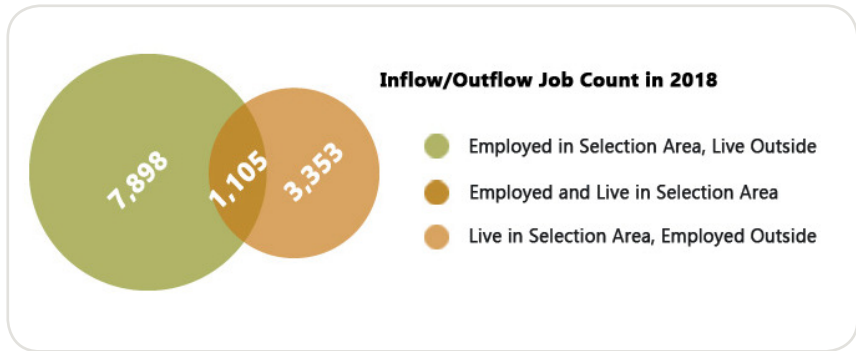
The educational services industry was by far the largest industry in Hanover, also a result of Dartmouth College's presence. More than 60 percent of all jobs in Hanover were in the educational services industry, nearly eight times more jobs than in the next largest industry, health care and social assistance. Workers in educational services were older on average than workers in other industries — 33 percent of educational services jobholders were age 55 or older, compared to 30 percent of all jobholders in Hanover. Only 11 percent of jobholders in educational services were age 29 or younger, compared to 16 percent of all jobholders in Hanover.

The Upper Valley On-The-Map Analysis

Hartford VT

Living in Hartford

- There were 4,458 Hartford residents who were primary jobholders in 2018.
- Hartford residents most commonly worked in the following locations:
 - In Hartford (1,105 residents, 24.8 percent)
 - Lebanon NH (1,033 Hartford residents, 23.2 percent)
 - Hanover NH (693 Hartford residents, 15.5 percent)
- A little more than half of Hartford residents, 51.4 percent, earned \$3,333 or more per month (or \$40,000 annually). In New Hampshire and Vermont overall, 53.4 percent of workers earned more than \$3,333 per month.
- Earnings varied based on industry. Among Hartford jobholders in the educational services sector, 70 percent earned wages of \$3,333 per month or more, while only 15 percent of accommodation and food services workers did.
- The largest share of residents worked in the following industry sectors:
 - Health care and social assistance (1,126 Hartford residents, 25.3 percent)
 - Educational services (756 Hartford residents, 17.0 percent)
 - Retail trade (527 Hartford residents, 11.8 percent)
 - Accommodation and food services (319 Hartford residents, 7.2 percent)
- Among jobholders age 29 or older who lived in Hartford, 34.5 percent held a Bachelor's degree or higher. An additional 30.1 percent held an Associate's degree or had completed some college education.
- Half of Hartford's resident jobholders, 51 percent, were age 30 to 54 and 29 percent were age 55 or older. Only 20 percent were age 29 or younger.
- Median household income in Hartford was \$64,493.

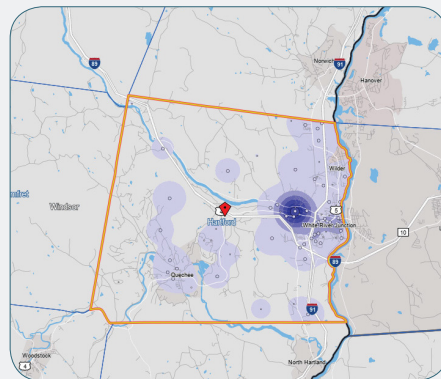


The Upper Valley On-The-Map Analysis

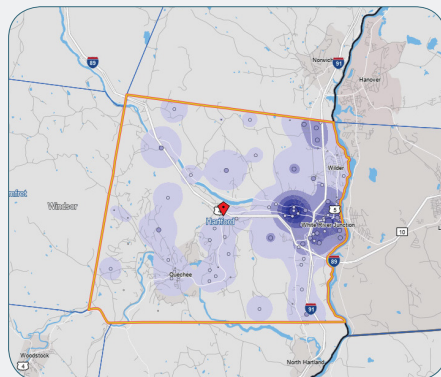
Working in Hartford

- There were 9,003 primary jobs in Hartford in 2018. Workers commuted to Hartford from the following locations:
 - In Hartford (1,105 residents, 12.3 percent)
 - Lebanon NH (461 Lebanon residents working in Hartford, 5.1 percent)
 - Burlington VT (275 Burlington residents working in Hartford, 3.1 percent)
 - Hartland VT (235 Hartland residents working in Hartford, 2.6 percent)
- Most workers who commuted to Hartford came from the Upper Valley, but workers also commuted further distances, including from Burlington VT. In 2018, 76.3 percent Hartford jobholders lived in Vermont.
- About 73 percent of Hartford jobholders were employed in the following industries:
- Over 80 percent of Hanover's workers were employed in the following industries:
 - Health care and social assistance (4,972 workers, 55.2 percent)
 - Professional, scientific and technical services (550 workers, 6.1 percent)
 - Retail trade (503 workers, 5.6 percent)
 - Educational services (460 workers, 5.1 percent)
 - Accommodation and food services (459 workers, 5.1 percent)

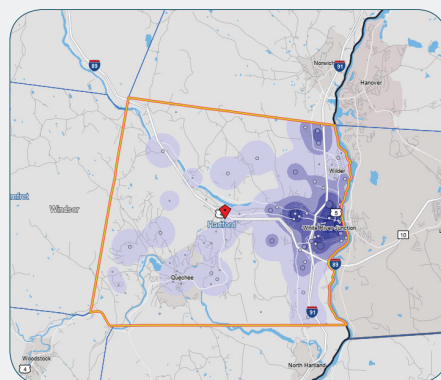
Location of Jobs in Hartford by Earnings



Less than \$1,250 per month



Between \$1,250 and \$3,333 per month



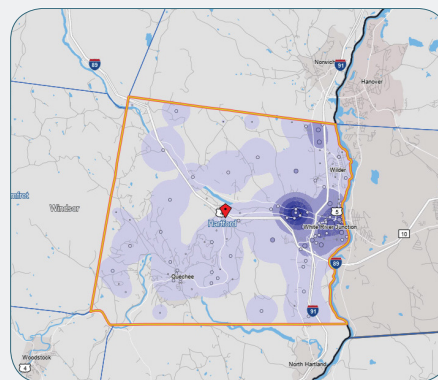
More than \$3,333 per month

The Upper Valley On-The-Map Analysis

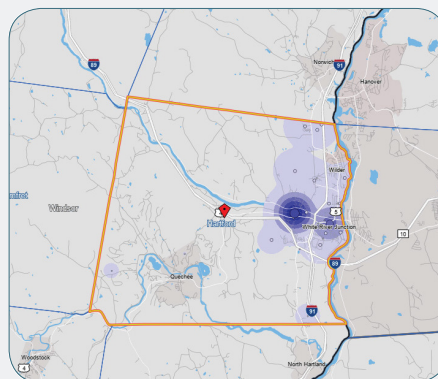
- Among Hartford jobholders, 38 percent earned \$3,333 or more per month (\$40,000 annually), and another 31 percent earned less than \$1,250 per month (\$15,000 annually). Among health care and social assistance jobholders, 42.4 percent of workers earned less than \$1,250 per month, as did 35.3 percent of workers in accommodation and food services.
 - Working 40 hours per week at Vermont's minimum wage \$10.50 in 2018) would result in earnings of \$21,840 annually, so jobholders in this cohort were likely working less than 40 hours per week.
- Hartford is home to White River Junction Veterans Affairs Medical Center. With the medical center as a major employer in town, Hartford had a location quotient for health care and social assistance jobs of 3.5, compared to New Hampshire and Vermont overall. (55.2 percent vs. 15.8 percent).
- Jobholders in the health care and social assistance sector comprised the largest group of workers in each of the following three wage categories: below \$1,250 monthly, between \$1,251 and \$3,333 monthly, and greater than \$3,333 monthly. This reflects the many types of jobs available in this sector, as well as the variation in the number of hours worked by those employed in the industry.
- Among individuals age 29 or older working in Hartford, 31.4 percent held a Bachelor's degree or higher. An additional 33.0 percent held an Associate's degree or had completed some college education.

Most jobs in Hartford were located in two clusters on the eastern side of town, near the Connecticut River, and north of I-89. Health care and social assistance jobs were concentrated west of I-91, around the White River Junction Veterans Affairs Medical Center. Most other jobs, particularly retail trade jobs, were located east of I-91.

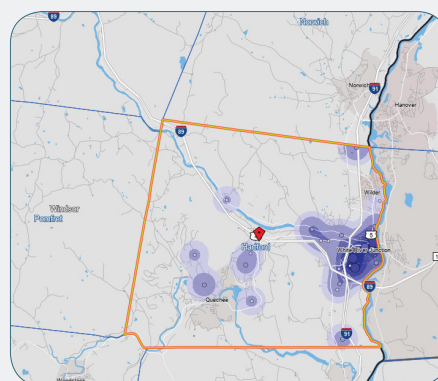
Employment Concentration by Industry



All Jobs Located in Hartford



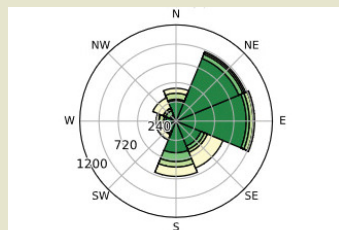
Health Care and Social Assistance Jobs



Retail Trade Jobs

The Upper Valley On-The-Map Analysis

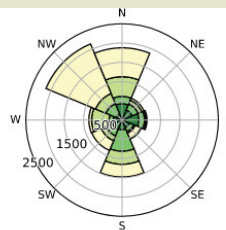
Job Counts by Distance/Direction in 2018 All Workers



Jobs by Distance - Home Census Block to Work Census Block

	2018 Count	Share
Total Primary Jobs	4,458	100.0%
Less than 10 miles	3,060	68.6%
10 to 24 miles	389	8.7%
25 to 50 miles	348	7.8%
Greater than 50 miles	661	14.8%

Distance and Direction
from Home to Work for
Residents of Hartford



Jobs by Distance - Work Census Block to Home Census Block

	2018 Count	Share
Total Primary Jobs	9,003	100.0%
Less than 10 miles	2,263	25.1%
10 to 24 miles	2,086	19.5%
25 to 50 miles	1,913	21.2%
Greater than 50 miles	3,067	34.1%

Distance and Direction
from Work to Home
for Workers Employed
in Hartford

Distance/Direction to and from Work in Hartford

Just under 70 percent of Hartford resident jobholders commuted less than ten miles. Many of them commuted east and northeast, either towards the eastern side of Hartford, or to the New Hampshire side of the Upper Valley. Like Lebanon and Hanover, Hartford is centrally located within the Upper Valley, and many employment opportunities were located either in town or nearby.

While most Hartford residents did not have to travel far to work, only about a quarter of those employed in Hartford commuted less than ten miles.

A larger number, over a third of those working in Hartford, commuted greater than 50 miles. A majority of them commuted from the north or northwest, from other areas of Vermont. Residents of Burlington and other towns in Chittenden County were particularly likely to commute to Hartford.

Overall

Hartford was the largest town on the Vermont side of the Upper Valley, in terms of both population and number of jobs. It is part of the urban center of the Upper Valley. Like Lebanon and Hanover, there were more jobs located in Hartford than there were employed residents. In 2018, there were slightly more than two jobs located in Hartford for each employed resident.

Educational attainment for Hartford residents age 29 or older was close to the overall Upper Valley average. Hartford residents were a little more likely to have a Bachelor's degree than residents of the Upper Valley overall, with 34.5 percent of Hartford residents age 29 or older having attained a Bachelor's degree, compared to 34.1 percent in the Upper Valley. Slightly fewer Hartford residents age 29 or older had either an Associate's degree or some college education, 30.1 percent, than in the Upper Valley as a whole, where 30.9 percent of residents age 29 or older had an Associate's degree or some college education.

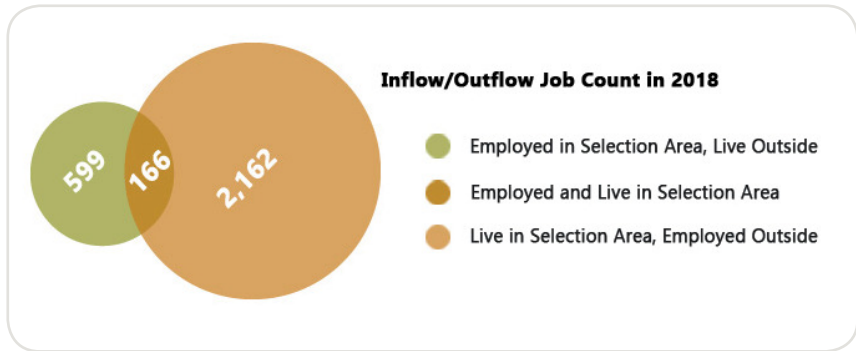
The median age of Hartford residents was 48.0 years, more than two year higher than the Upper Valley's median age of 45.7 years. A relatively large proportion of Hartford's population was age 65 or older. In the Upper Valley overall, 19.6 percent of the population was age 65 or older, but in Hartford, 25.6 percent of the population was age 65 or older.

The Upper Valley On-The-Map Analysis

Enfield NH

Living in Enfield

- There were 2,328 Enfield residents who were primary jobholders in 2018.
- Enfield residents most commonly worked in the following locations:
 - Lebanon NH (937 Enfield residents, 40.2 percent)
 - Hanover NH (371 Enfield residents, 15.9 percent)
 - In Enfield (166 residents, 7.1 percent)
- Among Enfield's jobholder residents, 58.2 percent earned \$3,333 or more per month (or \$40,000 annually). In New Hampshire and Vermont overall, 53.4 percent of workers earned more than \$3,333 per month.
- Earnings varied greatly based on industry. In the educational services sector, 68.9 percent of jobholders earned wages of \$3,333 per month or more, while only 19.5 percent of accommodation and food services workers did.
- The largest share of residents worked in the following industry sectors:
 - Health care and social assistance (588 Enfield residents, 25.3 percent)
 - Educational services (383 Enfield residents, 16.5 percent)
 - Retail trade (254 Enfield residents, 10.9 percent)
 - Manufacturing (197 Enfield residents, 8.5 percent)
- Among Enfield's resident jobholders age 29 or older, 34.2 percent held a Bachelor's degree or higher. An additional 32.4 percent held an Associate's degree or had completed some college education.
- Half of Enfield's resident jobholders were age 30 to 54, while 31 percent were age 55 or older. Only 19 percent were age 29 or younger.
- Median household income in Enfield was \$82,212.

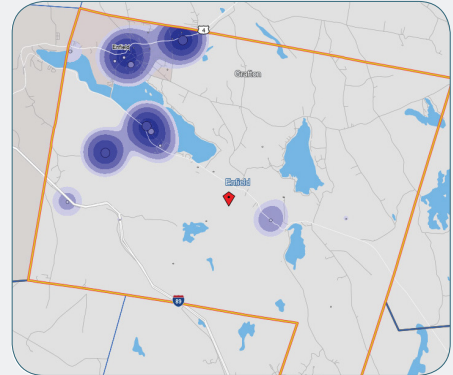


The Upper Valley On-The-Map Analysis

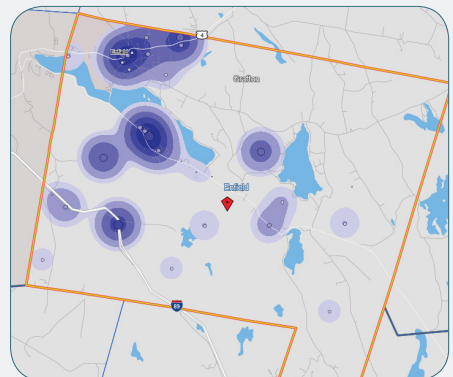
Working in Enfield

- There were 725 primary jobs in Enfield in 2018.
- Workers commuted to Enfield from the following locations:
 - In Enfield (166 residents, 22.9 percent)
 - Canaan NH (86 Canaan residents working in Enfield, 11.9 percent)
 - Lebanon NH (58 Lebanon residents working in Enfield, 8.0 percent)
- Just over 50 percent of workers in Enfield earned \$3,333 or more per month (\$40,000 annually)
- The largest share of jobholders were employed in the following industries:
 - Educational services (129 workers, 17.8 percent)
 - Administrative and support and waste management and remediation services (108 workers, 14.9 percent)
 - Construction (86 workers, 11.9 percent)
 - Retail trade (71 workers, 9.8 percent)
- Although just 17.1 percent of workers earned less than \$1,250 per month (\$15,000 annually), nearly half, 46.3 percent, of jobholders in accommodation and food services did.
 - Working 40 hours per week at New Hampshire's minimum wage would result in earnings of \$15,834 annually, so workers in this cohort were likely working less than 40 hours per week.

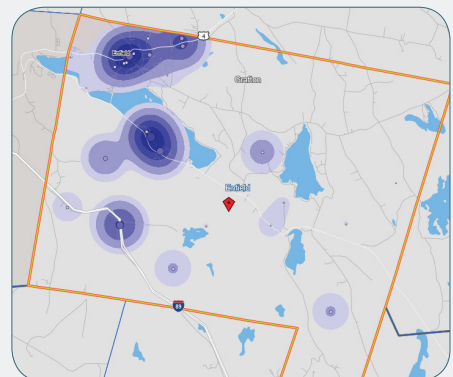
Location of Jobs in Enfield by Earnings



Less than \$1,250 per month



Between \$1,250 and \$3,333 per month



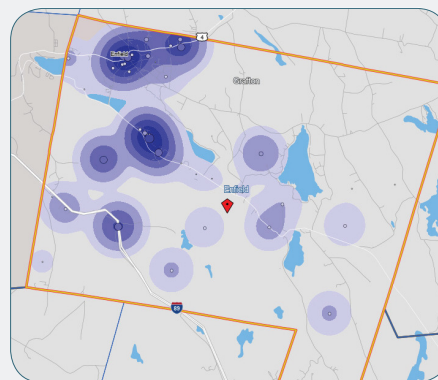
More than \$3,333 per month

The Upper Valley On-The-Map Analysis

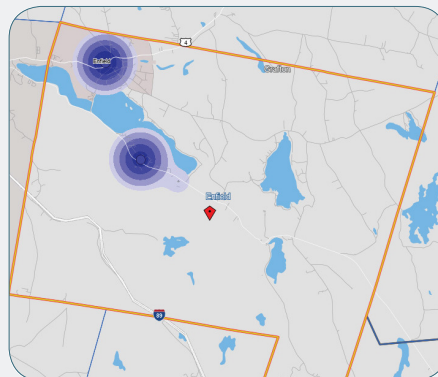
- Jobholders in the educational services sector comprised the largest group of workers earning greater than \$3,333 monthly, as well as the largest number earning between \$1,251 and \$3,333 monthly. Retail trade and accommodation and food services had the largest number of workers earning below \$1,250 monthly.
- Among jobholders age 29 or older working in Enfield, 32.6 percent held a Bachelor's degree or higher. An additional 29.4 percent held an Associate's degree or had completed some college education.

Most jobs in Enfield were concentrated on the western side of Enfield, on the northern and southern shores of Mascoma Lake.

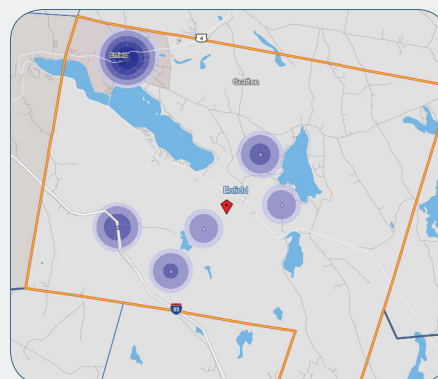
Employment Concentration by Industry



All Jobs Located in Enfield



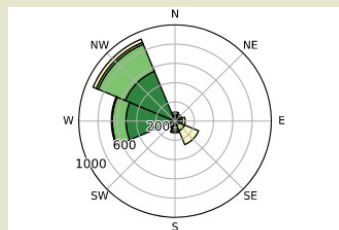
Educational Service Jobs



Administrative and Support and Waste Management Services Jobs

The Upper Valley On-The-Map Analysis

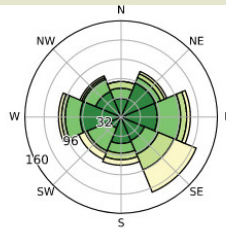
Job Counts by Distance/Direction in 2018 All Workers



Jobs by Distance - Home Census Block to Work Census Block

	2018 Count	Share
Total Primary Jobs	2,328	100.0%
Less than 10 miles	1,293	55.5%
10 to 24 miles	580	24.9%
25 to 50 miles	161	6.9%
Greater than 50 miles	294	12.6%

Distance and Direction
from Home to Work for
Residents of Enfield



Jobs by Distance - Work Census Block to Home Census Block

	2018 Count	Share
Total Primary Jobs	725	100.0%
Less than 10 miles	372	51.3%
10 to 24 miles	195	26.9%
25 to 50 miles	80	11.0%
Greater than 50 miles	78	10.8%

Distance and Direction
from Work to Home
for Workers Employed
in Enfield

Distance/Direction to and from Work in Enfield

Among Enfield's resident jobholders, 56 percent commuted less than ten miles. Overwhelmingly, Enfield residents commuted west and northwest, either to the western side of Enfield, or to Lebanon, Hanover and Hartford.

A little over half of those who worked in Enfield commuted less than ten miles. Most jobholders commuted from either Lebanon, to the west, Canaan, to the east and northeast, or from elsewhere in Enfield.

Overall

Enfield had a population of 4,545 in 2019, making it the 5th largest town in the region. Enfield had far fewer jobs located within the town than it had working residents, with only 0.31 jobs for every working resident. Towns like Enfield are known as "commuter towns" or "bedroom communities." Most towns in the Upper Valley are similar to Enfield in this way; primarily residential, with relatively few employment opportunities located in town. Instead, residents are likely to commute the relatively short distance to the "urban cluster" of Lebanon, Hanover or Hartford to take advantage of the employment opportunities located there.

While more than two-thirds of residents of Lebanon, Hanover, and Hartford commuted less than ten miles to work, residents of Enfield were likely to have a slightly longer commute. Just over 55 percent of Enfield residents commuted less than ten miles, while 25 percent of residents commuted 10 to 24 miles.

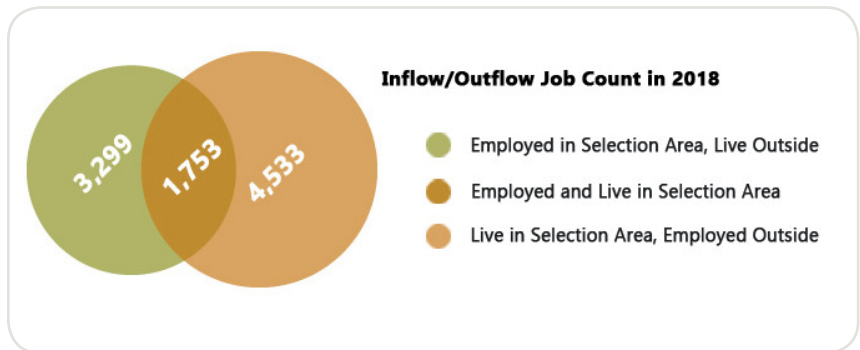
The median age in Enfield was 45.1 years, slightly below than the median age for the Upper Valley of 45.7 years. In Enfield, 14 percent of residents were between ages 35 and 44, while in the Upper Valley overall, only 10 percent of residents were between ages 35 and 44. Only 15 percent of Enfield residents were under age 20, compared to an Upper Valley average of 22 percent.

The Upper Valley On-The-Map Analysis

Claremont NH

Living in Claremont

- There were 6,286 residents of Claremont who were primary jobholders in 2018.
- Claremont residents most commonly worked in the following locations:
 - In Claremont (1,753 residents, 27.9 percent)
 - Lebanon NH (937 Claremont residents, 14.9 percent)
 - Newport NH (406 Claremont residents, 6.5 percent)
- Among Claremont resident jobholders, 46.6 percent earned \$3,333 or more per month (or \$40,000 annually). In New Hampshire and Vermont overall, 53.4 percent of workers earned more than \$3,333 per month.
- Earnings varied greatly based on industry. Nearly two-thirds, 66 percent, of jobholders in the manufacturing sector earned wages of \$3,333 per month or more, while only eight percent of accommodation and food services workers did.
- The largest share of residents worked in the following industry sectors:
 - Manufacturing (1,138 Claremont residents, 18.1 percent)
 - Health care and social assistance (1,136 Claremont residents, 18.1 percent)
 - Retail trade (922 Claremont residents, 14.7 percent)
 - Educational services (550 Claremont residents, 8.7 percent)
- Among Claremont resident jobholders age 29 or older, 27.6 percent held a Bachelor's degree or higher. An additional 30.9 percent held an Associate's degree or had completed some college education.
- Just over half of Claremont resident jobholders, 52 percent, were age 30 to 54, 25 percent were age 55 or older, and 23 percent were age 29 or younger.
- Median household income in Claremont was \$47,649.

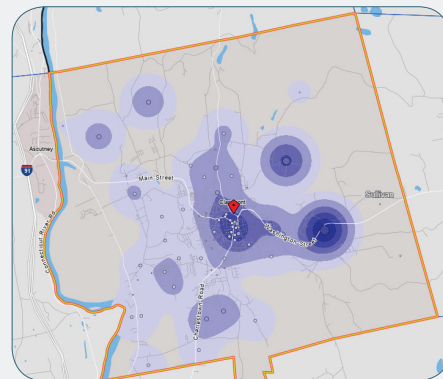


The Upper Valley On-The-Map Analysis

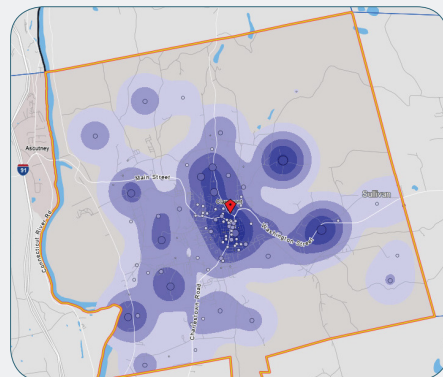
Working in Claremont

- There were 5,052 primary jobs in Claremont in 2018.
- Workers commuted to Claremont from the following locations:
 - In Claremont (1,753 residents, 34.7 percent)
 - Charlestown NH (279 Charlestown residents working in Claremont, 5.5 percent)
 - Newport NH (275 Newport residents working in Claremont, 5.4 percent)
 - Hartland VT (235 Hartland residents working in Hartford, 2.6 percent)
- Among Claremont jobholders, 44 percent earned \$3,333 or more per month (\$40,000 annually). Nearly three-quarters of jobholders (73 percent) in wholesale trade earned more than \$40,000, while just eight percent of accommodation and food services workers did.
- The largest share of jobholders were employed in the following industries:
 - Retail trade (1,227 workers, 24.3 percent)
 - Health care and social assistance (714 workers, 14.1 percent)
 - Manufacturing (642 workers, 12.7 percent)
 - Educational services (481 workers, 9.5 percent)
- Although only 19.9 percent of Claremont jobholders earned less than \$1,250 per month (\$15,000 annually), 52 percent of workers in accommodation and food services earned less than \$1,250 per month.
 - Working 40 hours per week at New Hampshire's minimum wage would result in earnings of \$15,834 annually, so workers in this cohort were likely working less than 40 hours per week.

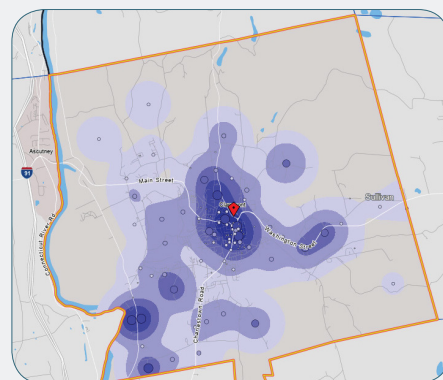
Location of Jobs in Claremont by Earnings



Less than \$1,250 per month



Between \$1,250 and \$3,333 per month



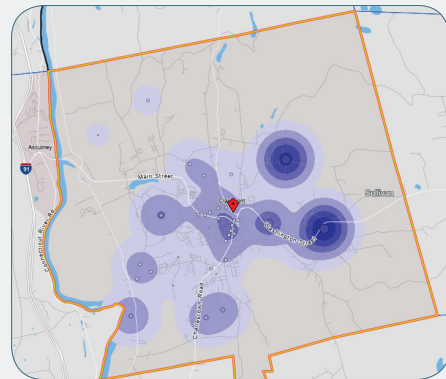
More than \$3,333 per month

The Upper Valley On-The-Map Analysis

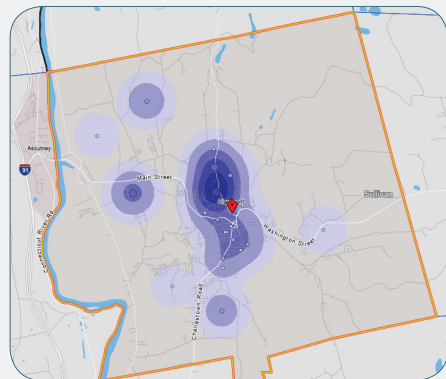
- The largest employers in Claremont were the Claremont School District and Valley Regional Hospital. These employers represented two of the largest industries in Claremont, health care and social assistance and educational services. The largest industry in Claremont was retail trade. The largest retail trade employer in Claremont was Walmart; the city estimated that approximately 200 workers were employed there, making it the third largest employer in the city.¹²
- Individuals working in the manufacturing sector comprised the largest group of workers earning greater than \$3,333 monthly. Workers in the retail trade industry made up the largest number of workers earning below \$1,250 monthly, and between \$1,251 and \$3,333 monthly.
- Among Claremont jobholders age 29 or older, 23.8 percent held a Bachelor's degree or higher. An additional 32.1 percent held an Associate's degree or had completed some college education.

Most jobs in Claremont were located in the central part of town, particularly health care and social assistance jobs. Retail trade jobs were mostly located on the eastern side of Claremont, and manufacturing jobs were concentrated in the southwest corner of the city, near the Connecticut River.

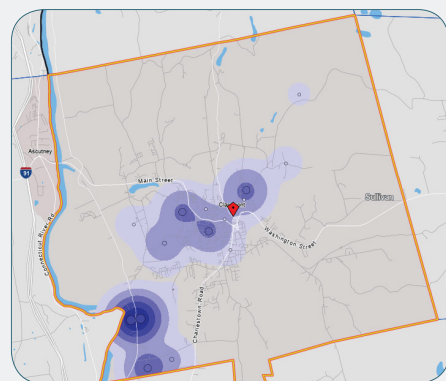
Employment Concentration by Industry



Retail Trade Jobs



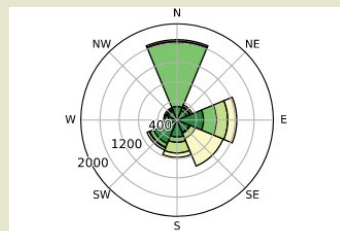
Health Care and Social Assistance Jobs



Manufacturing Jobs

The Upper Valley On-The-Map Analysis

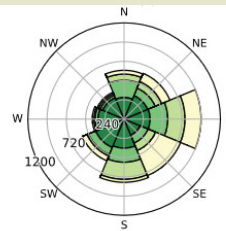
Job Counts by Distance/Direction in 2018 All Workers



Jobs by Distance - Home Census Block to Work Census Block

	2018 Count	Share
Total Primary Jobs	6,286	100.0%
Less than 10 miles	2,598	41.3%
10 to 24 miles	1,956	31.1%
25 to 50 miles	663	10.5%
Greater than 50 miles	1,069	17.0%

Distance and Direction
from Home to Work for
Residents of Claremont



Jobs by Distance - Work Census Block to Home Census Block

	2018 Count	Share
Total Primary Jobs	5,052	100.0%
Less than 10 miles	2,488	49.2%
10 to 24 miles	983	19.5%
25 to 50 miles	748	14.8%
Greater than 50 miles	833	15.5%

Distance and Direction
from Work to Home
for Workers Employed
in Claremont

Distance/Direction to and from Work in Claremont

Among Claremont resident jobholders, 41 percent commuted less than ten miles. Most of these workers were also employed in Claremont. Those commuting less than ten miles were likely to commute either east, in the direction of Newport NH, or southwest toward Charlestown NH.

Among Claremont resident jobholders, 31 percent commuted 10 to 24 miles. These residents primarily commuted north, in the direction of Lebanon, Hanover and Hartford.

Those who commuted distances of 25 miles or greater mostly commuted south or southeast, towards the Keene area, or towards Manchester and Nashua.

Overall

Claremont was the second largest community in the Upper Valley. With a population of 12,977, Claremont had 650 fewer residents than Lebanon, but had less than one third the number of jobs. For every employed resident of Claremont, there were 0.81 jobs in the city. Although Claremont did not have the concentration of jobs found in Lebanon, Hanover, or Hartford, it had the fourth-largest number of jobs in the Upper Valley. More than 5,000 workers were employed in Claremont, including 3,300 workers who commuted into Claremont from another community.

Among towns in the Upper Valley, Claremont is somewhat unique. Since it is located on the border of the Upper Valley, a larger percentage of workers commuted either to or from Claremont from towns that are not a part of the Upper Valley region, notably Newport and Charlestown, which border Claremont to the east and south.

Although workers commuting to and from Claremont follow a more diverse commuting pattern compared to other communities in the Upper Valley, Claremont is still strongly tied to the region. Nearly one quarter of Claremont resident jobholders worked in other Upper Valley communities, and more than 500 workers from Upper Valley communities commuted into Claremont as well.

The median age in Claremont was 41.7, four years younger than the Upper Valley as a whole. In Claremont, 16 percent of residents were between ages 25 to 34, compared to 13 percent in the Upper Valley. Claremont also had a lower percentage of residents age 60 or above, 25 percent, compared to the Upper Valley, where 27 percent of residents were age 60 or above.

The Upper Valley On-The-Map Analysis

Summary

Industries in the Upper Valley

The largest industries in the Upper Valley were health care and social assistance and educational services. This was primarily due to the high concentration of jobs in these industries in Lebanon, Hartford VT, and Hanover. Compared to New Hampshire and Vermont overall, the Upper Valley had a location quotient of 1.97 for health care and social assistance jobs, and a location quotient of 1.65 for educational services jobs. After healthcare and education, retail trade and manufacturing were industries that employed the most workers in the Upper Valley, but these industries were less concentrated in the Upper Valley than in New Hampshire and Vermont overall, with location quotients of 0.77 and 0.71, respectively. Jobs in retail trade and manufacturing accounted for a combined 18 percent of employment in the Upper Valley, and 25 percent of employment in New Hampshire and Vermont.

Commuting Distances for Workers and Residents of the Upper Valley

The municipalities of the Upper Valley have a high degree of economic integration. Nearly two-thirds of Upper Valley resident jobholders also worked in the Upper Valley. Both living and working in the region means residents were more likely to have a short commute. Three-quarters of employed Upper Valley residents commuted less than 25 miles, including 49 percent of residents with a commute of less than ten miles.

Distance Commuted, for Employed Residents of the Upper Valley			Distance Commuted, for Workers Employed in the Upper Valley		
Less than 10 miles	21,260	48.9%	Less than 10 miles	21,061	40.6%
10 to 24 miles	11,466	26.4%	10 to 24 miles	13,079	25.2%
25 to 50 miles	3,939	9.1%	25 to 50 miles	7,659	14.8%
Greater than 50 miles	6,784	15.6%	Greater than 50 miles	10,126	19.5%

Approximately 22,500 workers commuted into the Upper Valley for work, around 7,500 more than commuted out of the region. Workers commuting into the region made up around 45 percent of the workforce in the Upper Valley. Not surprisingly, workers commuting to jobs in the Upper Valley¹³ had longer commutes on average than residents of the Upper Valley. Thirty five percent of jobholders in the Upper Valley commuted 25 miles or more, ten percent more than resident jobholders of the Upper Valley. Almost 20 percent of workers employed in the Upper Valley, roughly 9,000 workers, commuted more than 50 miles to work.

¹³ This includes both those who live in the region and those who don't.

The Upper Valley On-The-Map Analysis

Educational Attainment

Upper Valley jobholders over age 29 were slightly more likely to have attained a Bachelor's degree or higher than those employed in New Hampshire or Vermont overall. In the Upper Valley, 34.3 percent of workers over age 29 held a Bachelor's degree or higher, compared to 32.5 percent of workers over age 29 in New Hampshire and Vermont. Workers in the Upper Valley were slightly less likely to hold an Associate's degree or some college education, 30.8 percent, compared to 31.9 percent in New Hampshire and Vermont. The percentage of Upper Valley workers with a high school diploma or less was virtually identical to the statewide number.

Resident jobholders of the Upper Valley over age 29 had slightly lower levels of educational attainment than New Hampshire and Vermont, indicating that employers in the Upper Valley attracted a larger percentage of educated workers to commute into the region compared to the percentage of educated residents who commute out of the region.

Age of Workers and Residents

The median age of residents of the Upper Valley was 45.7 years, nearly three years older than the median in either New Hampshire or Vermont. New Hampshire and Vermont are two of the three oldest states in the U.S. and are expecting a "silver tsunami," an increase in the number of retired workers, and potentially, not enough younger workers to replace them, resulting in a decrease in the size of the labor force. The Upper Valley's median age is higher than both states, and the region may start to see the effects of this shift sooner than the rest of the state.

	Resident Jobholders			Jobholders Working in Town		
	Percent of working residents aged 29 or younger	Percent of working residents aged 30-54	Percent of working residents aged 55+	Percent workers aged 29 or younger	Percent of workers aged 30-54	Percent of workers aged 55+
New Hampshire	22.1%	50.3%	27.6%	22.9%	45.9%	27.5%
Vermont	21.4%	50.3%	28.3%	21.6%	50.2%	28.1%
Upper Valley	19.9%	50.5%	29.6%	19.6%	50.8%	29.6%
Lebanon	21.9%	51.3%	26.7%	21.0%	52.7%	26.3%
Hanover	14.7%	54.7%	30.6%	15.9%	53.8%	30.3%
Hartford	20.1%	50.9%	29.0%	18.8%	46.6%	34.5%
Claremont	23.2%	51.6%	25.2%	24.2%	48.8%	27.0%
Enfield	19.0%	49.7%	31.3%	19.7%	47.7%	32.6%

The Upper Valley On-The-Map Analysis

The age of the population in the Upper Valley was reflected in the age of working residents. There were roughly two percent more Upper Valley resident jobholders aged 55 or older than there were in New Hampshire and Vermont, and two percent fewer resident jobholders aged 29 or younger.

The workforce in the Upper Valley was also older than New Hampshire and Vermont overall. There were roughly three percent fewer workers employed in the Upper Valley aged 29 or younger than there were in New Hampshire and Vermont. There were about two percent more workers aged 55 or older employed in the Upper Valley, and one percent more workers age 30 to 54.

Conclusion

Regions with high concentrations of jobs are advantageous for new or expanding businesses, since these businesses are more likely to select locations that already have a large and talented workforce. As a result, these regions are more likely to maintain or grow their workforces, and continue to attract talented workers and successful businesses. The Upper Valley fits this description. There is a high concentration of jobs, particularly in the municipalities at the center of the region. Most jobs in New Hampshire are located in the southeastern part of the state; the Upper Valley region has the largest workforce of any labor market area north of Concord. It has one of the largest workforces in Vermont as well, particularly on the eastern side of the state. In addition, the Upper Valley's workforce is well-educated, with higher levels of educational attainment than New Hampshire or Vermont; these states are among the more highly educated in the U.S.

Overall, New Hampshire is a net exporter of workers, as more residents commute to a different state (primarily Massachusetts) for work than residents of other states commute to New Hampshire for work. The Upper Valley is one of the few regions in the state that attracts more workers into the region than commute out of it.

The largest challenge facing the region is the age of its residents. New Hampshire and Vermont have two of the oldest populations in the U.S., and the Upper Valley has a higher median age than either state. Nearly thirty percent of employed Upper Valley residents are age 55 or older. As these workers near retirement age, likely within the next five to ten years, the workforce in the Upper Valley could shrink, as more workers retire than join the labor force. A shrinking workforce, along with a larger retired share of the population, can cause financial challenges for governments and taxpayers who provide services for older residents.

The Upper Valley is able to draw workers in from surrounding regions, so it is likely better positioned to face these challenges than other regions of the state with similarly aged populations. Still, maintaining or growing the workforce in the Upper Valley will require either in-migration of more residents and workers, or convincing more workers who live outside of the Upper Valley to commute into the region.

For more information on the New Hampshire communities in this region, please see the New Hampshire Community Profiles, at <https://www.nhes.nh.gov/elmi/products/cp/index.htm>



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