

An aerial map of Southern New Hampshire is the background of the cover. It features a white grid overlay. The map shows various geographical features, including roads, rivers, and land parcels. Some land parcels are highlighted in a light tan color. The title text is overlaid on the top right portion of the map.

2013 Comprehensive Economic Development Strategy

Prepared by

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On behalf of REDC I would like to recognize our partners in the publication of the 2013 CEDS Update. Without their advice and continued support this strategic plan would not be possible.

REDC wishes to thank the United States Department of Commerce Economic Development Administration for their continued support and funding. A sincere thank you is extended to Mr. Alan Brigham, Economic Development Representative, for his on-going advice and counsel. In addition, REDC would like to recognize Mr. Willie C. Taylor, Ms. Tonia Williams, Mr. Bill Good and Mr. Christopher Christian at the Philadelphia Regional EDA office for their continued support and guidance.

The REDC staff would like to recognize the active involvement of the CEDS Steering Committee, the REDC Board of Directors and our economic development partners in the Region, State and Federal levels for their suggestions and helpful contributions to this year's document.

Sincere thanks go to Rockingham Regional Planning Commission, Nashua Regional Planning Commission, Peter Francese, Demographer, Dennis Delay, Economist, and Public Service of New Hampshire for their cooperation and support of the REDC and CEDS process.

You may notice as you look through this year's CEDS, that the document looks very different than in past years. After receiving feedback over the past year, we determined that making the CEDS a more accessible, readable document would benefit our current stakeholders as well as a broader audience. I am pleased to report that we have not sacrificed any of our valuable data; it is just presented in a different way. I hope you enjoy it as much as we do. Special appreciation goes to Laura Harper of REDC this year for the spectacular work she has done on the CEDS re-design; thank you for all the time and effort you have put into this project.

One final note: over the past few years REDC has expanded its region to include communities outside of its original Rockingham County territory. Due to this expansion, REDC now does business under the name Regional Economic Development Center of Southern New Hampshire. We are still REDC, we just have a new name that better describes who we are.

With gratitude,



Laurel Bistany
Executive Director, REDC

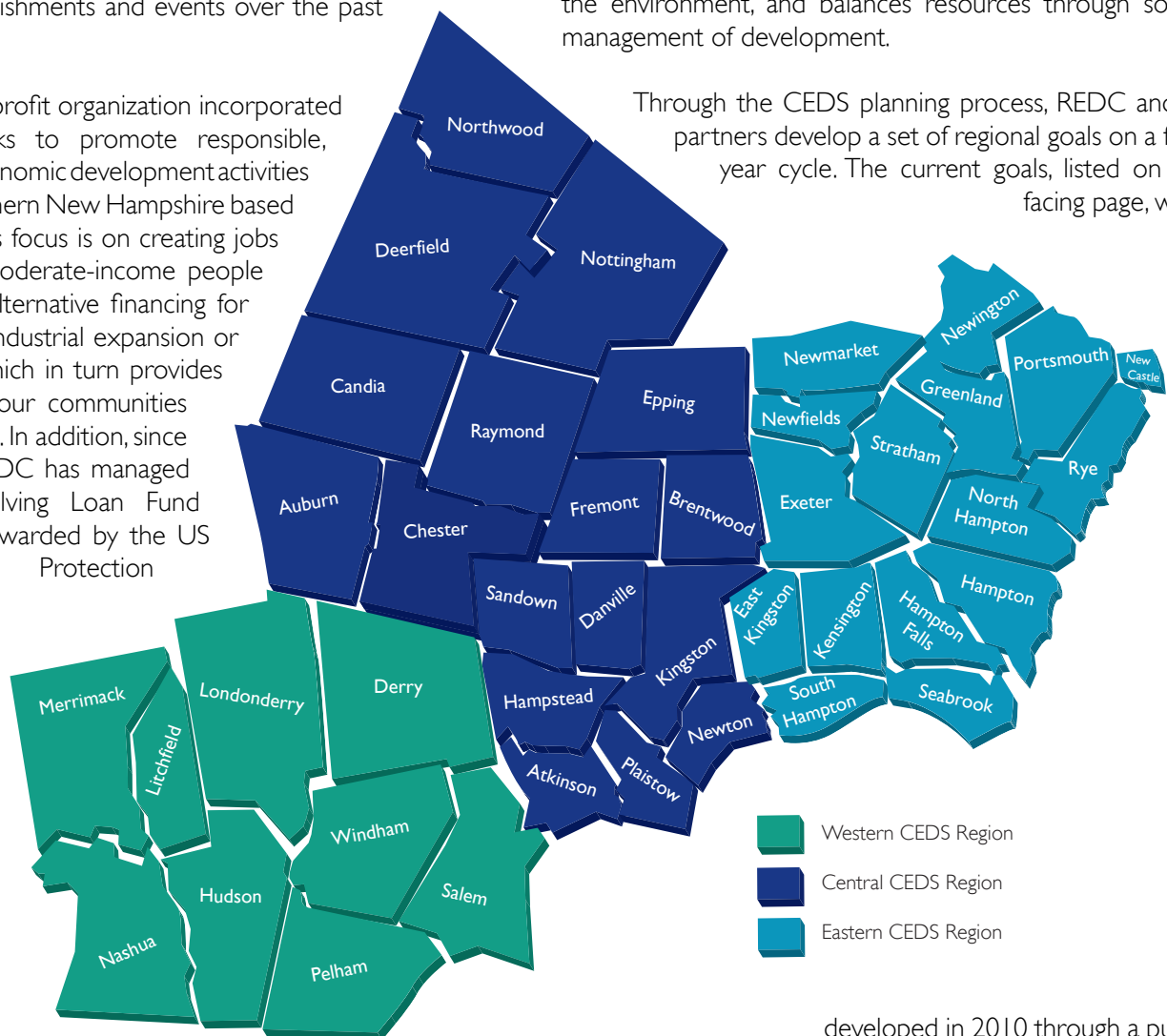
Introduction

The Regional Economic Development Center of Southern New Hampshire is pleased to present the 2013 Comprehensive Economic Development Strategy (CEDS) Update. This plan builds upon the work completed by REDC over the past 13 years and provides a summary of work, accomplishments and events over the past 12 months.

REDC, a non-profit organization incorporated in 1994, seeks to promote responsible, sustainable economic development activities within its Southern New Hampshire based region. REDC's focus is on creating jobs for low- to moderate-income people by accessing alternative financing for business and industrial expansion or relocations, which in turn provides tax relief for our communities and our region. In addition, since May 2010, REDC has managed a \$1M Revolving Loan Fund Grant (RLF) awarded by the US Environmental Protection Agency (EPA).

planning process developed with broad based and diverse community participation that addresses the economic problems and potential of an area. The strategy promotes sustainable economic development and opportunity, fosters effective transportation systems, enhances and protects the environment, and balances resources through sound management of development.

Through the CEDS planning process, REDC and its partners develop a set of regional goals on a five-year cycle. The current goals, listed on the facing page, were



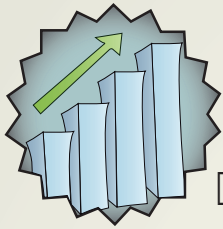
The RLF is used to capitalize a revolving loan fund from which the REDC provides low-interest loans and sub-grants to conduct cleanup activities of Brownfields sites for the purposes of redevelopment.

As part of its economic development efforts, REDC completes and submits to the Department of Commerce, Economic Development Administration an updated CEDS annually. The CEDS emerges from a continuous

developed in 2010 through a public process. In the CEDS, we present the state of our region, along with projects and programs that help satisfy the CEDS goals.

The CEDS Region is comprised of the 37 municipalities that make up Rockingham County, together with the Towns of Hudson, Litchfield, Merrimack and Pelham and the City of Nashua (all within eastern Hillsborough County). For the purposes of demographic analysis, the region is divided into three sub-regions, as shown on the map above.

CEDS Goals and Objectives



Economic Development

To create high-skill, higher-wage jobs within innovative clusters as a means to diversify the regional economy and improve the economic conditions in the area.

- Develop a diversified industrial and commercial base that is competitive in the global economy;
- Target innovation clusters, such as “green” technology, high-tech industries and biomedical firms;
- Foster growth of the job support network necessary to maintain the high-skill positions and cluster developments;
- Redevelop properties for industrial and commercial uses in “pockets of distress” areas, downtowns and village centers through the use of targeted financial resources; and
- Encourage the development of an economic development strategy and financial incentives at the state level that complements the business needs in southern New Hampshire.



Infrastructure Development

To invest in infrastructure improvements, such as roads, bridges, sewers, water facilities and broadband, and multi-modal transportation systems that will strengthen and diversify the regional economy.

- Maintain and expand the region’s infrastructure to address the needs of existing businesses and residences, as well as to accommodate the needs of new and expanding businesses;
- Target infrastructure improvements to “pockets of distress” in accordance with sustainable development principles;
- Expand public transit systems through investments in bus and rail service as a means to maximize the mobility of the workforce; and
- Identify and redevelop “brownfields” sites to return them to productive economic use.



Regional Cooperation

To develop cost-effective regional solutions to local problems as a means to improve municipal budgets and maintain the quality of life in the region.

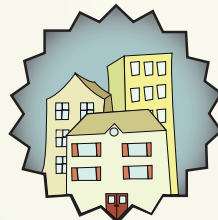
- Consolidate local services to create economic efficiencies and improve the effectiveness of service delivery;
- Develop regional partnerships through the regional planning commissions that encourage collaboration;
- Develop TIF-Districts and other economic development partnerships in order to create jobs; and
- Work collaboratively on the development and implementation of infrastructure projects that will lead to high-skill and higher-wage jobs.



Workforce Development

To leverage the resources available through the workforce development and university/ community college systems to address the growing skill needs of the business community and regional workforce.

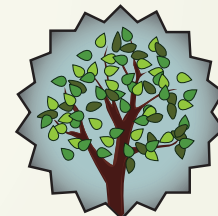
- Facilitate collaboration among the economic development stakeholders in the economic development, workforce development and education sectors to address the current and future skill needs of the business community and regional workforce;
- Identify and address the employment and skill needs of firms within the specific innovative clusters in the region;
- Support Green Launch Pad as a collaborative approach to university - private business partnerships;
- Foster workforce development at the high school, vocational, trade and technical school levels; and
- Collaborate with REDC on joint funding opportunities under the US Department of Labor to address layoffs in the region.



Workforce Housing

To develop diversified workforce housing options for all income levels to ensure the availability of workers for expanding businesses and new firms in the Region.

- Work with employers, state and local housing and development entities, banks and private developers to encourage the development of workforce housing on a regional basis;
- Address the foreclosure issue as it has impacted the region and create new housing opportunities through the resolution of this issue;
- Promote pedestrian-friendly mixed-use (residential and commercial) developments in the downtowns and village centers of the region;
- Balance workforce needs with housing needs as a means to identify the extent of need for workforce housing in the region; and
- Develop financial incentives for communities to work together on a regional basis to address the region’s workforce housing needs.



Environmental Preservation

To maintain the unique qualities of life in southern New Hampshire through the preservation of natural and historic resources and a balanced approach to economic development.

- Preserve and protect the region’s natural and historic resources and open space through active maintenance efforts and purchases of additional vacant land;
- Encourage investment in environmentally sustainable development related to “green” products, processes and buildings as part of the “green” economy;
- Support the agricultural and fishing industries serving the region;
- Preserve and enhance the unique environmental and historic characteristics of the region;
- Address the high energy costs of the region through conservation initiatives and working with the public utility companies; and
- Promote tourism and recreational activities that reflect the historic, cultural and natural resources of the region.

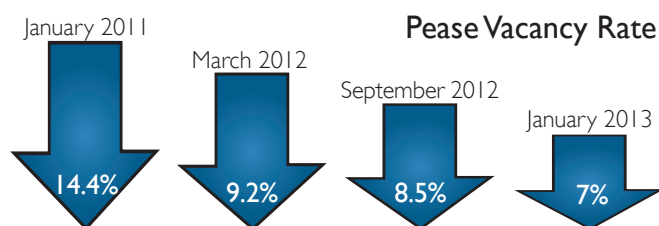
Economic Development

“Smart economic development strategies are essential for supporting innovative businesses, creating good middle-class jobs, and helping New Hampshire lead the way in the 21st-century economy. In addition to building a strong workforce and providing businesses with technical support, encouraging more private investment through alternative lending is a critical aspect of the kind of successful economic development efforts that will help New Hampshire’s existing businesses thrive and attract new companies to our state. I thank the Regional Economic Development Center of Southern NH for their commitment to a Comprehensive Economic Development Strategy that will strengthen the economy of Southern New Hampshire and our entire state.”

~Governor Maggie Hassen, New Hampshire

Pease Tradeport The Pease Development Authority (PDA), based in Portsmouth, NH, is an independent state agency established in 1991 in order to develop the land and many of the assets of the former Pease Air Force Base. Twenty years after the base closed, its successor, the Pease International Tradeport, is recognized by the Department of Defense as one of the most successful military-to-civilian conversions in the country. Due to the PDA’s strong management track record, the State of New Hampshire has since placed two other entities within its oversight: the Division of Ports and Harbors (DPH) joined the Pease family in 2001 and then in 2009, Skyhaven Airport, located in Rochester, NH, came on board.

In May 2013, Pease Air National Guard Base received the good news that it was selected as the top Air National Guard base to receive the new KC-46A tanker, pending the results of an environmental impact study. According to Col. Paul Hutchinson, commander of the 157th Air Refueling Wing, *“When the final decision is made in the spring of 2014, we expect to add an additional 100 or more full-time jobs at Pease, representing about \$7 million in additional direct payroll into the Seacoast economy and about \$45 million in military construction contracts over the next several years.”* The Air Force will begin an environmental impact study (EIS) and is slated to receive twelve new aircraft beginning in fiscal year 2018, pending a successful outcome from the EIS process.



Rendering and image of construction of new Smuttynose facility in Hampton NH. (Image courtesy of Peter Egelston)

Smuttynose Brewery Company Portsmouth-based Smuttynose Brewery Company has outgrown its existing location, and the company designed a brand new, state-of-the-art, LEED Certified facility in Hampton, NH. This important project will both save existing jobs and help create new ones for our region.

The Smuttynose expansion project was first brought forward to the CEDS Steering Committee in 2007. However, in order for construction to move forward, the project required that an existing sewer line be extended to the proposed site. In 2009 and 2010, REDC worked with the Town of Hampton, on behalf of the Smuttynose Brewing Company, to apply for funding from the Department of Commerce, Economic Development Administration (EDA). The EDA awarded the project \$250,975 in Public Works Grant funds in September 2010, and construction began the following year.

The sewer line extension project was completed in the spring of 2013. The goal of owner Peter Egelston was to maintain as much of the historic look and feel of the original farmhouse structures located on the Hampton site. The photo above illustrates the site construction as of early spring 2013 and compares it with the site renderings. The existing farmhouse was relocated on site and will be used as a restaurant. Smuttynose Brewery also preserved the existing barn and will use it as part of the brewery. The project is on schedule to open in the fall, 2013.

Infrastructure Development

“Transportation infrastructure and linkages have significant impact on the NH and Seacoast economies. Transportation connections to Boston and Cambridge and Routes 128 and 495 technology and innovation centers and to Manchester and NH's I-93 economic corridor are critical to support a strong economy in the Seacoast and across NH. As an area, the Seacoast should plan to invest in transportation if it wants to support economic competitiveness.”

~Ross Gittell, Chancellor - Community College System of New Hampshire

Interstate I-93 The expansion and reconstruction of I-93 is the most costly infrastructure project ever undertaken in New Hampshire and is the most important now underway in the CEDS region. For more than a decade, it has been designated by the New Hampshire Legislature to be the highest priority road project in the state. I-93 provides a vital transportation link between Southern New Hampshire and the Boston metropolitan area; It carries over 100,000 vehicles per day and is the busiest interstate segment in New Hampshire. Due to the capacity constraints of its four lane configuration (two northbound, two southbound), travel on I-93 has been hampered by significant congestion and a high accident rate for nearly two decades. These deficiencies have resulted in constraints to economic growth and community development in Southern New Hampshire.

The I-93 reconstruction project was identified as far back as 1991 by both the New Hampshire Department of Transportation (NHDOT) and Rockingham Planning Commission (RPC) Metropolitan Planning Organization (MPO) to address capacity and design deficiencies and the project was included on the State's Ten Year Transportation Improvement Program at that time. Due to changes in scope, permitting requirements, internal delays, and lawsuits, the Final and Supplemental Environmental Impact Statements and related permits were not finally approved until 2010.

NHDOT's final design involves a combination of transportation infrastructure improvements and strategies for the 19.8-mile corridor study. The main construction involves widening I-93 from the existing limited access four-lane highway to a limited access eight-lane highway, beginning at the Massachusetts/New Hampshire Stateline and extending northerly through Salem, Windham, Derry and Londonderry, and ending at the I-93/I-293 interchange in Manchester. However, due to existing water quality impairments in some of the watersheds (from road salt) that the highway traverses, the current plan is to construct only six travel lanes in the initial construction. The future paving of the fourth lane will depend on the success of managing and improving water quality in these watersheds. Other construction elements of the project include new park-and-

ride lots and bus service facilities at Exits 2 (2008), 4 (2007) and 5 (2008). A new replacement park-and-ride lot will be constructed at Exit 3 in 2014-15.

In addition to the highway expansion itself, the project includes four other significant 'non-construction' components: (1) expanded commuter bus service to Boston; (2) an incident management program and Intelligent Transportation System (ITS) to reduce delays associated with accidents, construction and congestion; (3) a Community Technical Assistance Program (CTAP) to help communities in the corridor to prepare for and manage growth that may result from the highway's expansion; and finally (4) a bi-state major investment study of future transit alternatives for the I-93 Corridor (Boston to Manchester) to plan for growth in travel demand without further highway expansion.



I-93 highway and sign. (Image courtesy of NH Department of Transportation)



Exit 3 on I-93 highway. (Image courtesy of NH Department of Transportation)

The estimated final project cost has risen dramatically over the years, increasing from approximately \$160M (2000) to \$788M (2012). To advance as much of the project as possible, the State authorized the use of special purpose Grant Anticipation Revenue Vehicle (GARVEE) bonds, (paid from future expected Federal funding allocations). So far \$181 Million in bonds have been issued (\$80 million in 2010 and \$101 million in 2012) and used for I-93 projects. Over the last several years it has become evident that the existing and currently foreseeable capital funding available will not support

construction of the full I-93 project. An additional \$237 million in bonding will be necessary to complete the project, yet with the expectation of reduced or level Federal funding and no state matching funds budgeted in the transportation program, NHDOT has indicated it cannot seek further bonding authority without additional supporting revenue.

Project construction is sequenced into three components – (1) the MA Stateline to Exit 3; (2) Exit 5 through I-293, and (3) the remaining middle section from north of Exit 3 to south of Exit 5. The most recent plan has the first and second of these programmed (funded) while the construction between Exit's 3 and 5 is largely deferred except for red-listed bridge replacements. The planned new Exit 4A interchange is privately funded.

To date, approximately \$151.2 million in construction work has been completed (12 projects), another \$162 million is underway (6 projects), and 39.9 million is planned to begin in 2013 (1 project). The project that is set to begin in 2013 is the last of the funded work occurring on the corridor based on anticipated future funding. Additional work is planned beyond the current Ten Year Plan and bond payback will extend through 2026. This construction schedule may be further altered pending availability of funding. Since the start of construction, the following project activity has taken place:

Completed (\$151.2M)	In Progress (\$162.2M)	Upcoming Construction (\$39.9M)
Exit 5 bus maintenance facility	Exit 5/ Route 28 Interchange	Exit 3 NB Mainline, NH
Exit 5 ramps and bridges	South Road Mitigation	Routes III & IIIA
Exit 4 full-service bus terminal	Exit 1 to Exit 2, NB & SB Mainline	
Exit 5 park-and-ride/ bus terminal	Exit 2 Interchange	
Exit 3 SB off-ramp & NB Bridges	Exit 3 SB Bridges over Routes III and IIIA	
Exit 1 ramps and bridges	Exit 3 SB Mainline, SB On-ramps and NH III.	
Exit 2 park-and-ride & Bus Terminal		
Cross Street bridge		
Exit 3 northbound mainline		
Phase I Intelligent Transportation Systems (ITS)		
Brookdale Road bridge		

(Image courtesy of NH Department of Transportation)

Exit 4a Update – New Ramp The proposed new exit would be located in Londonderry north of exit 4 on I-93. The connector road from the new exit would feed into Derry along Madden and Folsom Roads into Ross's Corner and Route 28. This would open up commercial and industrial parcels in both Londonderry and Derry as well as provide better access to Derry's commercial/industrial Tax Increment Finance District (TIF) along Route 28 (Manchester Road). Additionally, the new access road and exit would help reduce traffic congestion along Route 102 in Derry and Londonderry and help the Town of Derry in its revitalization efforts of the Downtown. Future development and tax base expansion in both towns and employment opportunities would occur with the development potential in the vicinity of the new exit/interchange.

Once a final decision is made by the Federal Highway Administration (FHWA) and the NHDOT for a potential approval for the new interchange, funding sources would be pursued to seek both federal and state money, as well as a financial commitment from the towns of Derry and Londonderry and from private developers. It is the target to have issuance of the FEIS (Final Environmental Impact Study) in by the Fall of 2013 to the FHWA. Additional information is being requested by the various resource agencies reviewing the FEIS and the project's consulting engineers are addressing those issues. There is also local legislative action being taken to include the project in the NHDOT's 10 Year Plan for a more short-term time frame.

East–West Bus Service Via Route 101

East–West bus service connecting the Seacoast with the Merrimack Valley has long been identified as a specific need in both the regional planning agency long range transportation plans and the NHDOT's 2003 Statewide Intermodal Transportation Planning Study. In particular, connections to Manchester Boston Regional Airport (MBRA) and downtown Manchester are recognized priorities. At present, traveling from Portsmouth to Manchester by transit requires a connection in Boston. The project was further advanced in a 2008 feasibility study for such a service conducted by Rockingham Planning Commission and Southern NH Planning Commission. The study concluded that there was not sufficient demand for a fully self-supporting scheduled bus service, but that "interlined" service that combined scheduled service from park-and-rides with door-to-door airport shuttle service was feasible if startup costs were subsidized.

In 2010, NHDOT conducted a procurement process to select a contract for a pilot service, and in early 2011 successfully

secured \$2.5M in Congestion Mitigation and Air Quality (CMAQ) funding to cover startup costs and three years of operating subsidy for the project. Flight Line Inc. was selected as the vendor to provide the service. Vehicles were ordered in January 2013, with delivery expected in June. Service is expected to start in early summer 2013. Hourly scheduled service will include stops at Portsmouth Transportation Center, the Epping Park & Ride at the interchange of NH 125 and NH 101, the Airport and downtown Manchester. Deviations in service to pick up passengers in Hampton and Exeter may also be accommodated.

Capital Corridor Commuter Rail

NH Capital Corridor (NHCC) passenger rail service would run on upgraded tracks between Boston MA and Concord NH, a distance of approximately 78 miles. The proposed passenger service will connect Concord, Manchester, Manchester-Boston Regional Airport and Nashua NH with Boston MA's North Station. Four stations are planned on opening day – Concord, Manchester Airport (at Access Road), downtown Manchester and Nashua.

Potential benefits of the project include:

- The NHCC will provide real and lasting stimulus to the state and national economy. As the train stations are built, private money will redevelop key areas focused on multi-modal transit-oriented development. Train stations will become a reality through a public private partnership with the NHRTA.
- Preliminary studies show that the NHCC will provide jobs, both short- and long-term, on the project itself from associated real estate development and from new business opportunities in rebuilt communities.
- The State of NH formed the New Hampshire Rail Transit Authority (NHRTA) in 2007 with the responsibility to develop and oversee rail and related rail transportation services in New Hampshire. NHRTA has a broad-based, 28-member board including representatives from all areas of the state.

Future Tasks:

- Federal Railroad Administration (FRA) and Federal Transit Administration (FTA) Planning Grants: The NH DOT has been awarded grants from the Federal Rail Administration to study the feasibility of service to Concord, and the Federal Transit Administration to undertake an alternatives analysis between Lowell and Manchester. After receiving all of the necessary approvals, NHDOT has begun the work on the NH Capitol Corridor Study working with URS Corporation, the selected consultant. The first steps in the process are to

meet with identified stakeholders and establish an Advisory Committee for the study made up of representatives from 23 stakeholder groups in the corridor. The committee will meet over the course of the 18-month study. The purpose of the Advisory Committee is to provide a forum for updates on the progress of the study and discussion of the issues that are identified throughout the process. Public engagement will also include a website for the study and three public meetings.

Operating Agreements:

- The Massachusetts Bay Transportation Authority (MBTA) was successful in negotiating operating agreements with Pan Am for the passenger rail service in the Capitol Corridor. The NHRTA and NHDOT are working to clarify what impact this will have on the project.

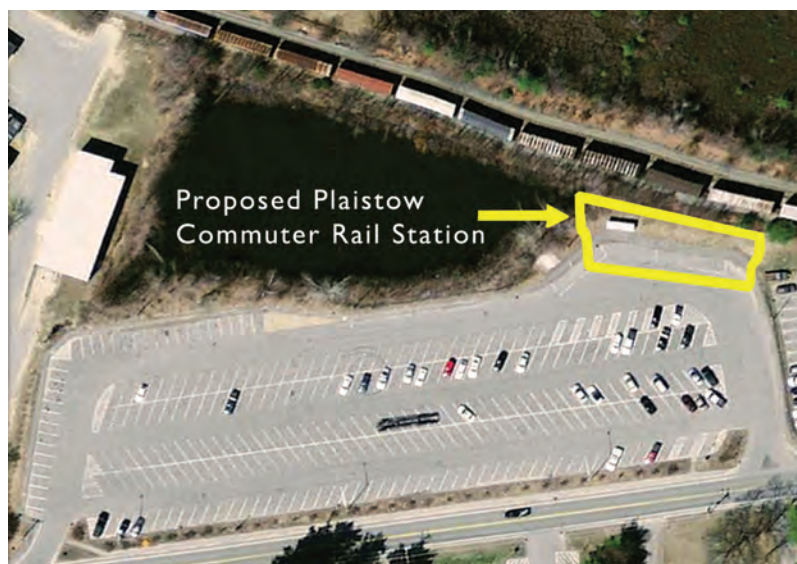
Plaistow Commuter Rail The MBTA commuter rail extension to Plaistow represents a significant opportunity to bring the first commuter rail extension into Southern New Hampshire with minimal ongoing cost. It has been under consideration since the early 1990s with the establishment of the Plaistow Area Transit Advisory Committee (PATAC). PATAC, working with the RPC/MPO developed a three-part plan to improve commuter oriented transit service in Plaistow and surrounding communities. Phase 1 involved a successful CMAQ-funded project to initiate commuter bus service in the NH125 corridor in 1994; Phase 2 established a commuter park-and-ride lot in 1997, adjacent to 125 and the B&M railroad. The park and ride was designed to serve both the commuter bus services and a future commuter rail station. Phase 3 involved MBTA service extension from Haverhill. Nearly \$1.0 million in CMAQ funds were secured in 2000 to fund this extension, however the project was not implemented because the NHDOT and MBTA could not secure rights to use the privately owned land north of the Mass/NH state line.

The extension project was revived in 2008 at the initiative of the MBTA who is interested in relocating their Bradford MA layover facility to the northern end of their service extension (North Haverhill or Plaistow). They approached NHDOT, MPO and Plaistow in November of 2008 with a proposal to provide subsidy-free commuter service to the Westville Road station site in Plaistow if the layover could be relocated to one of several possible sites nearby. The MBTA proposed a funding partnership similar to the Pilgrim Partnership used to extend commuter rail into Rhode Island whereby New Hampshire would provide transit capital funds (via CMAQ) in exchange for a multi-year operating agreement to provide commuter service.

In 2010, the MBTA and Pan Am Railways finalized a trackage rights agreement giving MBTA the ability to operate passenger trains on the Pan Am tracks in Plaistow. This resolved a major obstacle that had stopped the earlier attempt to establish service.

Also in 2010 the NHDOT, MBTA, RPC-MPO and Plaistow cooperatively applied for a USDOT Transportation Investment Generating Economic Recovery (TIGER) grant funding to construct a layover facility and station and to purchase passenger cars. While unsuccessful, the application formalized the bi-state partnership between NHDOT and MBTA. Subsequently, Plaistow applied for a second CMAQ grant of approximately \$7.3 million to fund the majority of capital expenses. This grant was approved but with the condition that the full grant would become available only after a site selection, environmental assessment and ridership analysis were successfully completed.

In 2011 and 2012, the NHDOT and Plaistow cooperatively developed a scope of work for the required analyses and study, undertook a consultant selection process and chose a preferred vendor. Further progress on the project was delayed when the Town of Atkinson objected to the potential use of the Westville Homes site as a layover facility. In early 2013, the parties agreed that this and another Plaistow site will be excluded from study in the site selection and analysis, thus ending the objection. Subsequently, the NH Legislature Capital Budgets Committee approved NHDOT's request to use Turnpike Toll Credits to fund the local match required to use the CMAQ funding. The study is expected to commence in June or July of 2013 and be completed in approximately 18 months. A decision to proceed with the project will be contingent on the outcome of the study.



Proposed Plaistow Commuter Rail Station (Image courtesy of the Town of Plaistow)

Cooperative Alliance for Regional Transportation

The Greater Derry-Salem Cooperative Alliance for Regional Transportation (CART) transit system provides shared-ride and demand response public transportation service five days a week in the communities of Chester, Derry, Hampstead, Londonderry, Salem and Windham.

CART was established in 2006 with a goal of coordinating the transportation services provided by health and human service agencies in the region through a centralized call center handling scheduling and dispatching of those services. The intent of such coordination is to simplify rider access, improve cost effectiveness, combine trips and pool vehicle and other resources to better leverage federal transit funding available to the region. CART is a partner in the Greater Derry-Salem Regional Coordinating Council for Community Transportation (RCC), one of a network of regional transit coordination initiatives around the state. Prior to the establishment of CART, no public transit services were available for Southern Rockingham County communities. Federal (FTA) funding allocated to the urbanized area was unused.

Medical appointment and employment trips constitute the bulk of trips made by CART users. CART is currently working to restructure its service to provide scheduled flex routes – a hybrid of fixed route and demand response service where specific communities are served on specific days of the week. Buses stop at defined destinations, but will deviate to pick up passengers who have called to schedule a trip. The first of these routes was launched in February 2012 in Derry and Londonderry, as a cooperative project with Rockingham Meals on Wheels and Easter Seals of NH. Similar routes are being developed for Hampstead, Windham and Salem. CART's planned Derry-Windham-Salem fixed route service is likely not to go forward due to lack of non-federal matching funds and will likely be reprogrammed to flex routes.

CART is facing significant challenges in the current year. Windham has withdrawn as a participating member and Derry has not fully funded its share of local match costs. In addition, changes in urbanized area status of the Nashua Urbanized Area (UZA) (now a Transportation Management Area [TMA]) means that less of the FTA funding for which CART is eligible may be spent on operations. CART is exploring opportunities to partner with other agencies to reduce costs, increase efficiency and secure long term viability.

Commuter Bus Service Expansion

The I-93 Expansion Project included a significant and beneficial expansion in commuter bus service to Boston that is available in the corridor, funded as part of the project's overall impact mitigation. The expanded service began operation in November, 2008. NHDOT contracts with a private entity, Boston Express, to operate the service and maintain facilities at Exits 5 in Londonderry and Exit 2 in Salem. The bus service operates seven days a week from Exits 5 and 2, and weekdays only from Exit 4, providing up to 28 round-trips on weekdays and 17 round-trips on weekends. Downtown Manchester service operates with six round trips each day. The buses serve South Station and Logan Airport.

The implementation of this project began as a traffic mitigation measure included in the I-93 Environmental Impact Statement. New park-and-ride lots with bus terminals were constructed at Exit 5 in Londonderry and Exit 2 in Salem to support the service. State of the art intercity motor coaches were acquired using Congestion Mitigation and Air Quality Program (CMAQ) funds. The project follows the highly successful public-private partnership used in the I-95 corridor, with the private carrier responsible for ongoing maintenance of the bus terminals and buses and public funds used for initial capital costs and three years of operating subsidy. The funding model originally called for operating costs to be paid for entirely through the farebox by the end of the third year of service, but fell short. The State has secured additional operating support to cover the five years of service provided for in the I-93 Environmental Impact Statement (EIS). Farebox recovery is at about 84% through 2012 and has climbed steadily in its first three full years of operation.

Ridership has grown slowly and steadily, growing by about 25% over the first three years (Figure 9). Growth was virtually flat in 2012, however, showing year-over-year increase on one-tenth of one percent. While the 2012 total is below projections, those numbers did not account for the building of ridership which typically occurs in the startup phases of new service of this type. Also it is important to note that these counts do not include about 41,000 riders who are traveling to Logan Airport. Including those passengers would add 11 % to the ridership totals.

Boston Express also provides service to the Nashua area off of Route 3/E.E. Everett Turnpike at Exits 6 and 8 that has rapidly growing ridership. Eleven daily weekday round trips are provided to South Station and Logan Airport. Ridership for this service was 190,133 in 2012, up over 14% from 2011.

UNH Interns Study Hampton Intermodal Center Proposal (Written by Viet Ha Nguyen and Matthew Sanborn)

Based on our research, we conclude that this project is not only beneficial but also feasible. Compared to the initial investment with the budget of four million dollars for building the intermodal center, the return from the entire project with new bus routes results in a variety of benefits: economic, transportation, environmental, and energy. This would be not only a new intermodal center with various parking spaces for people in the region to be used as park-and-ride service, but also



UNH Interns Matthew Sanborn and Viet Ha Nguyen.

a new bus system that, in the long run, will stimulate the growth of the region. Moreover, the feasibility of the project is based on our rough estimation of cost and revenue of the new bus services.

Although these benefits are not easy to quantify as a hard number, we believe that ultimately our analysis gives you an idea of how the Intermodal Center will impact this region in a positive way. We hope that further research will be done to complete the study.

Transportation Benefits	Units	Value
Benefits to East – West Bus Users		
Total Ridership	Persons	1,438,255
Average Annual Ridership	Persons	47,942
Average Annual Reduction in VMT	Miles	1,399,302
Benefits to COAST Bus Users		
Total Ridership	Persons	1,098,218
Average Annual Ridership	Persons	36,607
Average Annual Reduction in VMT	Miles	217,355
Benefits to North – South Bus Users		
Total Ridership	Persons	3,672,000
Average Annual Ridership	Persons	122,400
Average Annual Reduction in VMT	Miles	3,825,000
Specific Benefits to Highway Users		
Car Maintenance Cost Savings	Dollars	\$7,648,740
Congestion Cost Savings	Dollars	\$5,868,613

Environment Benefits	Units	Value
NOX	Tons	255
CO2	Tons	3,829
CO	Tons	76,795
Hydrocarbons	Tons	513
Noise Emission	Dollars	\$166,216

Economic Benefits	Units	Value
Direct Impact	Dollars	\$ 4,000,000
Indirect Impact	Dollars	NA
Induced Impact	Dollars	NA

Energy Benefits	Units	Value
Gas Savings	Gallons	6,648,646

Memorial & Sarah Long Bridges In response to structural deficiencies with the Memorial Bridge on US 1 and the Sarah Long Bridge on the US 1 Bypass that would have lead to their closures (within 3 years for the Memorial), the Maine and New Hampshire DOTs completed a needs analysis of the bridges that cross the Piscataqua River between Portsmouth, New Hampshire and Kittery, Maine (including the high-level I-95 Bridge). The intent was to identify the long-term transportation connections across the Piscataqua, evaluate the roll of each bridge and determine the alternatives that best address those requirements.

The “Maine-New Hampshire Connections Study” as it was known, included a full analysis of transportation, land use, social, economic, and environmental conditions. It evaluated needs and a range of feasible alternatives for highway, rail, transit, marine navigation, pedestrian and bicycle modes of transportation. After an extensive analysis and public involvement process, three alternative proposals were carried forward as feasible; 1) Replacing the Memorial Bridge and rehabilitating the Sarah Long Bridge; 2) replacing both bridges and moving the Sarah Long Bridge upstream; and 3) replacing both bridges and moving the Sarah Long Bridge upstream and increasing the height of the bridge deck. Due mainly to the high estimated costs and ongoing funding constraints for transportation infrastructure, the first alternative was initially recommended for implementation.

However, after further structural analysis of the Sarah Long Bridge it was deemed necessary to replace the structure instead of rehabilitating it.

Work on the Memorial Bridge began with the removal of the existing bridge in January, 2012, and with two of the three new spans in place, the project is on track for completion on schedule in July of 2013. The cost for the replacement of the Memorial Bridge is \$81.4 million split equally between Maine and New Hampshire. The project has also received TIGER II funding which offsets \$20 million of total project cost.

The Sarah Long Bridge, which includes rail access for the Portsmouth Naval Shipyard, is currently undergoing engineering and design, and is expected to begin construction in 2015. The new bridge is expected to be situated just to the north of the current structure and will have a wider opening and allow a better approach angle and easier navigation for large ships. In addition, the bridge will be elevated somewhat to require fewer openings and will include space for bicycles and possibly pedestrians. The current estimated cost for the replacement is approximately \$160 million split evenly between New Hampshire and Maine, however the ultimate cost will not be known until the design is finalized.

Along with the I-95 high-level bridge, it is expected that the ongoing repairs, maintenance and operations of the bridges will cost another \$300 million over the next thirty years. It is expected that these funds will come from a combination of sources including FHWA, NH and Maine Turnpikes, general DOT funds, and the Department of Defense. In addition, it has been recommended that the Interstate Bridge Authority (IBA) be reestablished to oversee the three bridges and a capital fund that would be contributed to equally by each state to be used for ongoing repair and maintenance.



Memorial Bridge, Portsmouth NH.

the major urban areas of Strafford County, namely, Dover, Somersworth and Rochester. It also provides an important link to Concord via US Route 4 and to vacation and tourist destinations in the Lakes Region and the White Mountains. The Turnpike is part of the National Highway System (NHS), reflecting its significance as an important transportation link in the State and regional systems. The highway is the only practical route connecting the urban areas of Portsmouth and Dover, and because of that, the highway transportation system of these communities and the larger region are unusually dependent on this single highway. Other alternatives involve diversions of considerable distance using secondary routes to the east in Maine or west of Great Bay.

The Newington–Dover Bridge has been a key bottleneck on this critical highway since the late 1980s, a condition that became progressively worse with the redevelopment of Pease as a major employment center in the 1990s and 2000s. During weekday and weekend peak hours, traffic flow at the bridge frequently operates at unacceptable levels of service (LOS F) with motorists often experiencing heavy congestion and long delays within this segment of the corridor. Even at non-peak periods, the highway can be unreliable, with minor accidents causing major traffic

backups at unpredictable times. Traffic volumes on the Little Bay Bridges increased from approximately 30,000 vehicles per day in 1980 to over 70,000 vehicles per day in early 2000s. With continued development at Pease and in Portsmouth, traffic growth is expected to grow to approximately 94,000 vehicles by 2025.

Addressing this problem through expansion of the Little Bay Bridges became a high priority regional infrastructure project as identified by the NHDOT and Rockingham and Strafford MPOs in the early 1990s. The project has been carried in the State's Ten Year Plan since the mid 1990s

and officially got underway in 2003 with the establishment of an Advisory Task Force and the development of design alternatives and environmental impact studies. Final environmental documentation and approvals were completed and received in 2008 and construction of the first major component of the project began in 2010. The

Spaulding Turnpike Newington–Dover

The Spaulding Turnpike is a major limited access north-south highway, linking the Seacoast area of Rockingham County to

full project is not expected to be completed before 2019.

The 'Newington–Dover Bridge' project involves multiple components. The major components, costs, and construction schedules are shown and described below. The total cost for the project is estimated at \$235M (\$212.5M for construction). The same fiscal constraint issues affecting the I-93 project are affecting the Newington-Dover project, however, this project has the advantage of being funded under the turnpike system which is better funded. Even so, to date, the full funding for the project is not programmed into the Ten Year Plan, and this may impact the timing of completion for the last two components as shown in the following table.

Component	Schedule	Cost
TSM, Park & Ride, other TDM and Transit enhancements	2010-2015	NA
Widen the Little Bay Bridges to 4 lanes in each direction: New Southbound Span	2010-2013	\$54.1M
Widen the Little Bay Bridges to 4 lanes in each direction: Rehabilitate Northbound Span	2014-2016	\$34.1M
Reconfigure Consolidate Interchanges: Exits 2,3,4 (Newington)	2012-2015	\$48.7M
Reconfigure Consolidate Interchanges: Exits 5,6 (Dover)	2014-2017* subject to change	\$49.2M
General Sullivan Bridge – Rehabilitate for bike, ped, and other recreation access	2016-2019* subject to change	\$26.8M

The project elements are more fully described as follows:

- **Transportation System Management (TSM), Park & Ride, other Transportation Demand Management (TDM) and Transit enhancements:** Prior to the start of construction of the project a number of enhancement were put in place to mitigate the existing traffic congestion. These included ITS/variable message signs to alert drivers to incidents, delays or unsafe conditions; preposition of tow trucks for bridge incident clearing; Installation of EZpass to reduce toll queuing; construction of Park and Ride Lots at Exit 9 (Dover) and Route 4 (Lee) to support ride share and commuter bus service; Support to Seacoast Commuter Option Transportation Management Association (TMA) to encourage employer

based trip reduction measures; Commuter bus service to Boston – extension from Portsmouth (I-95 Exit 3) to Dover (Exit 9); Cooperative Alliance for Seacoast Transportation (COAST) "Clipper Connection" PNSY employee shuttle. All these elements have been completed and are ongoing.

- **Widen Little Bay Bridges to Four Lanes Northbound and Southbound:** The main components of the project will construct an entirely new southbound bridge span between the existing span and the General Sullivan Bridge and the rehabilitation of the two existing Little Bay Bridge spans to serve together as the north bound span. Construction on the new southbound span is nearly complete and expected to be fully completed in Fall 2013. Work on the northbound span will begin in 2014.
- **Interchanges:** Nearly half of the construct cost of the project will be spent on highly complex projects to reconfigure and consolidate interchanges on both the Newington and Dover sides of the river. The Newington work will occur first and will result in the closure of existing Exit 2 and will radically change Exit 3 into a full-service interchange with Woodbury Ave., provide a major new access point to Pease Tradeport and provide connectivity between the parts of Newington east and west of the Turnpike. This contract has been awarded and construction work began in 2012. In Dover, Exit 5 (Hilton Park) will be closed and functionally replaced with a reconfigured Exit 6. The project is still being designed and is expected to include extensive soundwalls.
- **General Sullivan Bridge:** The final component of the project will be the rehabilitation of the existing, unused General Sullivan Bridge, which will become a dedicated bicycle and pedestrian facility. The extent of rehabilitation required will be evaluated, though at a minimum it will involve full deck and floor system replacements, pier repair, approach work and painting. The south side approach was completed as part of the Newington Interchange work. The completion of this rehabilitation will establish entirely new bicycle/pedestrian connectivity that has never existed between Dover and Newington. It will not only complete a key regional link for bicycle transportation but will represent a significant new recreation facility for the region.

East Coast Greenway The East Coast Greenway (ECG, often referred to as an 'urban Appalachian Trail'), is envisioned as an all-season, multi-use trail extending 2,900 miles from Calais, Maine to Key West, Florida, and connecting major cities along the Eastern Seaboard and potentially a major cultural, scenic and recreational asset for the region. During 2007-2008, the Rockingham Planning Commission

headed up development of a Conceptual Design and Implementation Plan for the New Hampshire segment of the Greenway, known as the NH Seacoast Greenway (NHSG). In late 2008 an interim on-road route for the Greenway, following NH Routes 1A and 1B, was designated and signed. Ongoing work to implement the NH portion of the Greenway is overseen by a regional advisory committee of representatives from corridor communities, Rockingham Planning Commission, NHDOT, Seacoast Area Bicycle Routes (SABR), the East Coast Greenway Alliance, and neighboring trail groups in Maine and Massachusetts.

Current implementation work is focused on building a pilot section of off-road trail in Seabrook on the State-owned southern portion Hampton Branch rail corridor. A local trail committee, the Seabrook Rail Trail Alliance has developed a trail management agreement with NHDOT and planned a capital campaign to generate local match for federal Transportation Alternative program funds. Work to build local support has been aided by the opening in mid-2010 of sections of the ECG in Newburyport and Salisbury, which has sparked local interest in trail development. The target for completion of the pilot section of trail is 2015.

The most significant and positive development for the ECG in the past year was the advancement of state acquisition of the Hampton Branch railroad right of way between Portsmouth and Hampton Center– the future off- road segment of the Greenway. As of Spring 2013 the NHDOT has entered into purchase and sale negotiations with Pan Am and has secured sufficient Federal CMAQ funds to pay for the acquisition, as well as to carry out initial trail construction work. With the successful acquisition, the entire length of the former B&M Eastern rail line, from Seabrook to Portsmouth will be preserved. This is a very important development that may result in a more rapid completion of the off-road section of the ECG than was anticipated.

American Recovery and Reinvestment Act Projects

In February 2009, Congress enacted the American Recovery and Reinvestment Act of 2009 known as “ARRA” which was designed to provide stimulus to the economy through three main avenues: tax benefits, grants, and temporary entitlement expansion. Each received roughly one-third of the total stimulus package in terms of dollar value. The grant portion was primarily designed to fund infrastructure projects that



were “shovel ready” – i.e. projects within existing programs for which design, permitting and approvals were in place or nearly completed so they could be implemented quickly.

In New Hampshire, Governor Lynch established the Office of Economic Stimulus (OES) in January of 2009 to function both as the central coordinator of ARRA funding and the central point of contact to track the use of ARRA funds. June 30, 2011 was the last day of operations for the OES. Information on ARRA projects in the REDC region and across New Hampshire is still available at the OES website, www.nh.gov/recovery.

In its last report, issued in May 2011, OES announced that the State had been awarded a cumulative total of \$666.2M in ARRA funded grants in all program areas, and that a total of \$978.6M had been awarded in New Hampshire in contracts, grants and loans to all entities including the State government, municipalities, universities and colleges, non-profits and businesses. Projects in Rockingham County received \$116,429,419 in ARRA funds and projects in Hillsborough County received \$171,376,713. In the eight OES reports, dating back to June of 2009, the cumulative jobs impact reported for the State was 8.153 million hours of work or 12,125 full time job equivalents (FTEs).

ARRA funds were divided into nine separate program areas including education, employment, energy and environment, health and nutrition, housing, public safety, technology and transportation. With respect to economic development projects of interest to the CEDS process, the most relevant program areas were energy, environment and transportation. Transportation projects in the REDC region received \$71M in ARRA funds. Energy and environment projects in the REDC region were awarded \$48M in ARRA funds. Energy projects were primarily in the form of energy conservation grants awarded to municipalities and other entities through the NH Office of Energy and Planning; environment projects are primarily sewer and water grants awarded to municipalities the NH Department of Environmental Services, and transportation projects are bridge, highway and public transportation grants retained by the NHDOT for its highway program, and awarded to municipalities and transit agencies throughout the State.

Aside from the obvious economic stimulus role that ARRA funding was designed to provide to the State's and region's economies, the additional infrastructure improvements that have been made possible are likely to prove important in regional economic development efforts in the longer term. These funds have provided a ready, if short lived, source of funding to move important infrastructure projects forward.

Regional Cooperation

“Regional cooperation will be the focus of the balance of this decade. After suffering through the economic downturn of 2008-2011, communities are realizing that the best way to provide cost-efficient local government is to do so by providing the regionalization of municipal services, especially those services that can save by using economies of scale. In addition, communities that work together will find new ways to provide less costly service and in many ways, this would lead to improvements in service quality. Expect that intergovernmental cooperation will be on the rise.”

~George Bald, Former NH Commissioner, Dept. of Resources and Economic Development

Granite State Future New Hampshire's Regional Planning Commissions (RPCs) have taken a unique approach to addressing local problems and needs by joining forces in an ambitious three-year project being led by the Nashua Regional Planning Commission, and funded through the Sustainable Communities Program from the US Department of Housing and Urban Development (HUD). Through the Granite State Future project, each RPC will develop its own regional comprehensive plan based upon local values and needs that, when considered together, will present a comprehensive vision for how we can improve our communities, regions, and the State. The 3-year project will culminate with a snapshot of regional priorities and visions for New Hampshire's future. The project is based on the recognition that better public decisions get made when we consider all the options and look at the big picture. Throughout the state, regions and localities are facing decisions about transportation and land use, about economic development and resource management, and about housing, public health, energy, and cultural, historic, and natural resources. Granite State Future will help local decision makers understand what communities think about all of these issues, present options and strategies supported and endorsed by local communities, and will assist with increasing efficiencies and benefits for New Hampshire's taxpayers.

The program provides an unprecedented level of support for, and emphasis on, public engagement in the planning process. The RPCs are working with a range of community and business leaders, state agencies, counties and municipalities, and citizen groups, to develop a robust and productive public dialogue within each region. The project is specifically committed to engaging members of communities at the grass roots level and being responsive to the interests of every sector of the community. Better public decisions are made when everyone affected participates in the process. Supported by NH-based resources and technical support, Granite State Future will be the product of the people of New Hampshire to identify shared interests, and direct the use of limited government resources.

This initiative will help to truly engage communities, regions and the State, to identify, share and replicate successful projects. Together, this collaboration will make it possible for large communities and small villages throughout the state to achieve economic vitality, and can protect the natural resources, character and rural landscapes that are so important to New Hampshire.

The objectives of this project are to:

- Protect New Hampshire's unique beauty and character. Identify local assets that are important to the lasting prosperity of our communities, regions and State.
- Capitalize on and incorporate shared values and opportunities included in existing plans and research.
- Plan for public infrastructure investment through an open and transparent process.
- Direct capital investments toward locally identified needs.
- Conserve our natural, social and financial resources.

In the winter and spring of 2013, the project sponsored community listening sessions, with support from the University of New Hampshire's Carsey Institute. These sessions provided vital information and perspective toward addressing the unique needs of local and regional communities through a fair and democratic process. The RPCs are in the process of leading their communities in considering the impacts of land use and transportation decisions on our economic development, our health, our costs, and our natural and cultural resources. Through scenario planning, communities will think through desired future development patterns, and identify and prioritize place-based implementation projects that support social connections and cultural values. The plans will identify implementation actions that balance community needs and identify the most efficient use of limited government resources for future infrastructure and community investments, making wise use of limited financial resources.

Workforce Development

“The importance and benefits of workforce development cannot be oversold, and I applaud REDC for making this investment toward New Hampshire’s economy. These types of investments in job training will both help meet economic demands in the short-term while also laying down fundamentals for our long-term economic success and competitiveness. REDC’s work represents the best kind of economic development initiatives, and I am excited to continue to support this important goal.”

~Senator Jeanne Shaheen, United States Senator for New Hampshire



Employee at Resonetics, a polymer laser micromachining company located in Nashua NH.

WorkReadyNH is an initiative of the Community College System of New Hampshire, the Office of Governor, the NH Department of Resources and Economic Development, and the NH Department of Employment Security. When it launched in 2011, WorkReadyNH was offered at the following four NH Community Colleges:

- Great Bay Community College (Portsmouth, Rochester)
- Manchester Community College
- River Valley Community College (Claremont and Keene)
- White Mountains Community College (Berlin, Conway, Littleton)

WorkReadyNH In an attempt to address gaps in worker readiness, the State of NH launched the WorkReadyNH program. The program focuses in the areas of math, reading and problem solving. It also addresses the so-called “soft skills” such as workplace behaviors, teamwork and communications needed in today’s work environment. The program is open to unemployed and under-employed New Hampshire residents.

WorkReadyNH helps job-seekers by improving their skills and adding a nationally recognized credential to their resume. The program utilizes standardized assessment testing to identify gaps in abilities and adds training to strengthen the weaker areas. Upon successful completion of the program, a job-seeker will earn bronze, silver, gold or platinum level certification. Each certification level corresponds to a skill set needed for success within a range of specific jobs.

Since the program start in October 2011, the WorkReadyNH program has graduated 563 participants across the state. The participants have earned the following levels for the National Career Readiness Certificate:

- | | |
|----------------|----------------|
| • Bronze – 106 | • Silver – 357 |
| • Gold – 103 | • Platinum – 3 |

With additional grant funds to the Community College System, the program expanded in the Spring of 2013 to include:

- Lakes Region Community College (Laconia)
- Nashua Community College
- NHTI, Concord’s Community College (coming soon)

The program continues to expand, with more employers recognizing the value in the credentials and asking for it in their application process. The program has had companies use the National Career Readiness Certificate as a benchmark for current employees to establish training needs throughout the organization and as entrance requirements into apprenticeship programs. Local employers around the state serve in an advisory role to ensure WorkReadyNH is training future and incumbent workers in the areas identified by business and industry as crucial to success in the workplace.

With the success of WorkReadyNH, the Statewide Liaison and Directors have been consulting with groups in Maine and Massachusetts to implement WorkReadyME and WorkReadyMA. Employers across New England are echoing the concerns of NH employers in the skills gap and



Great Bay Community College, Pease Trade Port, Portsmouth NH.

"Workforce development is critical to sustaining a healthy economic environment and for attracting new employers to the region. At Great Bay Community College, we see this as integral to our mission. Employers continue to be concerned about talent acquisition and we continue to partner with them to ensure that we are positioning our graduates for the jobs of today and tomorrow. To engage successfully and meet the challenges and opportunities of our increasingly complex and competitive global economic environment will require a quality education, and Great Bay is increasingly working with businesses to do customized training to upgrade the skills of their current workforce as well as developing curriculum and training labs that address their workforce needs."

~Will Arvelo, President -Great Bay Community College



Hooks Johnson giving a tour of Resonetics, a polymer laser micromachining company located in Nashua NH, to the REDC Board Members. Left to Right: Hooks Johnson, Resonetics COO; Wesley Moore, REDC Vice Chair; Warren Henderson, REDC Chair; Scott Zellar, REDC Board member; David Bickford, REDC Board member.

recognize the value in the soft skills/professional development training.

Technical & Trade Training Programs

During the 2012 CEDS Planning Process, the steering committee members held a discussion regarding the lack of properly trained workers to fill basic jobs such as electricians, plumbers and machinists. This led to a discussion about what training is available to the residents and workers of Southern New Hampshire. The committee identified the lack of training opportunities – or the lack of information about what opportunities are available – as a top priority for review during the 2012 CEDS Update.

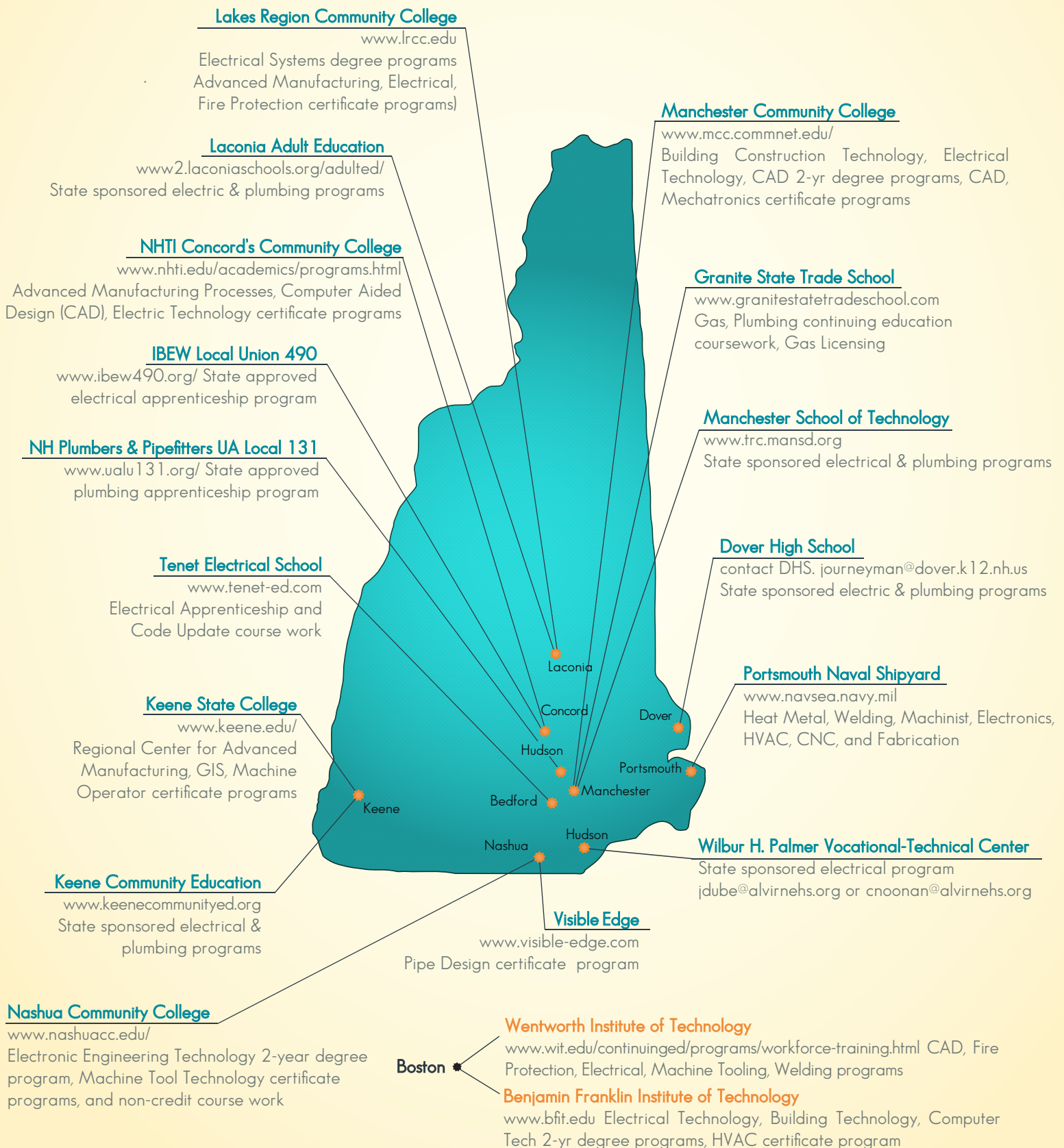
As a result, REDC compiled a comprehensive list of technical and trade training programs available in and around Southern New Hampshire. The focus for our research was primarily on trade programs such as electrical, plumbing, HVAC, welding, machinery, advanced machinery/CNC, and other like programs. The goal of this project was to gather the program information, locating it in one central place, and putting into a useful and usable format.

With the need for trained and skilled workers remaining in high demand, programs such as the Advanced Manufacturing Partnership in Education (AMPed, see following section) are helping to make a difference in New Hampshire. As part of the 2013 CEDS process, we've reviewed the data from 2012 and updated it when appropriate. In addition, the website maps and links will be updated during the summer.

STEM Education In its August 1, 2012 study, the Congressional Research Service states that the term "STEM education" refers to "teaching and learning in the fields of science, technology, engineering, and mathematics. It typically includes educational activities across all grade levels—from pre-school to post-doctorate—in both formal (e.g., classrooms) and informal (e.g., after-school programs) settings." Due to reports that suggest poor performance in STEM education, STEM has become a "hot button" topic which dominates education, training and policy-making discussions in New Hampshire.

Technical & Trade Training Programs

Southern NH Region



Advanced Manufacturing Partnerships in Education (AMPed)

In the fall of 2011, the Community College System of New Hampshire (CCSNH) was awarded a \$19.9 million grant by the U.S. Department of Labor under the Trade Adjustment Assistance Community College Career Training Act to develop training programs that will support New Hampshire's advanced manufacturing industry. The new program, officially branded as New Hampshire's Advanced Manufacturing Partnerships in Education (AMPed), focuses on providing necessary advanced-manufacturing skill training across the state.

The lead applicant for the grant was Great Bay Community College (GBCC), part of the Community College System of New Hampshire, which also includes Nashua Community College (NCC), Manchester Community College (MCC), Lakes Region Community College (LRCC), River Valley Community College (RVCC), White Mountains Community College (WMCC) and NHTI-Concord's Community College (NHTI). Each college in the consortium has been touched by the grant.

AMPed will make a lasting impact on New Hampshire's manufacturing industry by transforming the entire



ADVANCED MANUFACTURING PARTNERSHIPS IN EDUCATION

community college system's advanced manufacturing programming to better prepare trade adjustment assistance (TAA) participants, the unemployed, returning veterans and other non-traditional learners for high-wage, high-skill employment within this vibrant industry sector.

As of the March 31, 2013, a total of 1,954 unique participants had been trained against the 8,799 performance goal set (904 were WorkReadyNH participants and 1,050 were trained in manufacturing programs and courses). All colleges made progress against their performance objectives. The colleges have been active in curriculum development for new degrees and certificates (the grant calls for a total of 28 new manufacturing programs to be created) and in-lab renovations and new equipment purchases.

Grant Performance Goals

- Providing training and skills development to 8,800 students
- Developing 28 new certificate and degree programs
- Updating all existing manufacturing programs with the input of NH manufacturers
- Creating a common core curriculum across the NH community college system
- Building partnerships with over 100 NH manufacturing companies
- Adding nearly \$10 million in new equipment for training across the community college system.
- Expanding training capacity by renovating labs at five campuses (NHTI, MCC, NCC, LRCC, WMCC) and adding two new labs at RVCC and GBCC (Rochester),
- Developing career pathways by aligning manufacturing curriculum across CCSNH with manufacturing skill requirements
- Assisting manufacturers in ensuring all workers meet basic work-skill requirements through a community college wide WorkReadyNH program
- Maximizing use of technology (e-classes, virtual mentoring) to accelerate the time through school while keeping education affordable and enhancing instructional quality
- Developing articulation agreements at both the high school and 4-year institution level to reduce barriers and provide opportunity for continued learning and career advancement of students

New programs as of March 31, 2013

NHTI New Hampshire Technical Institute	MCC Manchester Community College	LRCC Lakes Region Community College	NCC Nashua Community College
<p>Advanced Manufacturing Processes Certificate Approved 5/2012</p> <p>This certificate is designed to provide the entry-level manufacturing technician or CNC operator with the basic knowledge of machining operations, using traditional machine tools and basic CNC programming and CNC machine operation.</p>	<p>Mechatronics Certificate Program Approved 6/2012</p> <p>The Mechatronics Certificate will provide detailed knowledge of machining, electrical and electronic theory as it applies to the latest technologies and skills required by manufacturer.</p>	<p>Advanced Manufacturing Certificate Approved 1/2013</p> <p>Provides the entry level manufacturing technician or machine operator with basic skills and knowledge.</p>	<p>Machine Tool Technology CNC Programming Certificate Approved 1/2013</p> <p>Prepares students for highly skilled world of Computer Numerical Control (CNC) machining.</p>

AMPed is sponsored by a \$19.97 million grant from the U.S. Department of Labor, Employment & Training Administration TAACCCT Grant #TC-22504-11-60-A-33. The Community College System of NH is an equal opportunity employer, and adaptive equipment is available upon request to persons with disabilities.

Additional information on manufacturing programs offered at the community college system is available at <http://www.ccsnh.edu/academics/advanced-manufacturing>.

"New Hampshire's businesses, our high schools, the Community College system, Colleges and Universities, and others engaged in workforce development have made important progress towards ensuring that people in New Hampshire enter the workforce ready to work and that our businesses can fulfill their need for well-educated and skilled employees. We need to continue to promote those collaborations and to streamline federal workforce training and development programs to ensure that our limited taxpayer dollars are used in an efficient and effective manner to help those seeking work receive the help they need to get a job during these difficult economic times."

~ Senator Kelly Ayotte, United States Senator for New Hampshire

Running Start In 1999, the Community College System of New Hampshire (CCSNH) introduced the Running Start program, a partnership between the community colleges and high schools giving students the opportunity to take courses for concurrent high school and college credit. Courses taught through the Running Start program are college courses taught at the high school by credentialed high school faculty as part of the daily class schedule. *"It's an outstanding example of the community college system's efforts to improve access, affordability and the success of NH's students and economy,"* stated Paul Holloway,

chairman of the CCSNH Board of trustees and chairman of the Holloway Automotive Group.

Currently, Running Start is offered in almost every high school in the State. There is also an online version of the program called eStart. The program is restricted to high school juniors and seniors, with some exceptions made on an individual basis. High school students interested in the program should contact his/her high school guidance counselor. For more information about Running Start and eStart, please visit the CCSNH website at www.ccsnh.edu

Workforce Housing

“The demand for stable housing for the Seacoast area workforce remains remarkably consistent and robust. The migration to renting that resulted from the softening of the home buying market in the last five years has suppressed vacancy rates, inflated rents and generally made access to decent, affordable rental housing more difficult than ever for the working households who traditionally have the most critical need for it.”

~ Marty Chapman, Executive Director -The Housing Partnership

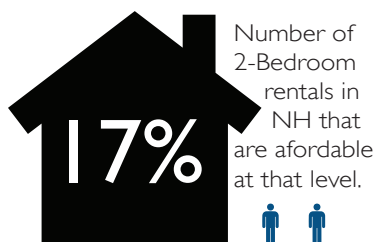
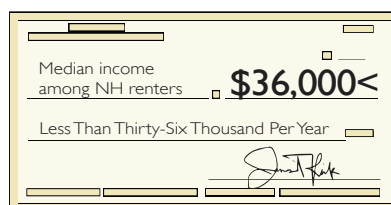
Workforce housing is housing that is affordable for people of modest means. According to the Workforce Housing Coalition of the Greater Seacoast, southeastern New Hampshire is one of the least affordable regions in the country. Median monthly rent for a two bedroom apartment in Rockingham County is \$1,166, the most expensive in New Hampshire. Between 2002 and 2012, the median gross rental cost rose over 24%. According to federal guidelines, an “affordable” place to live should not cost more than 30% of a household’s income. The median income among renters in New Hampshire is less than \$36,000 per year. Only 17% of two-bedroom rentals in the state are affordable at that level. Many workers and their families cannot afford to live in the towns in which they work, presenting a challenge for workers and employers.

On January 1, 2010 New Hampshire RSA 674:58 through 674:61, known collectively as New Hampshire’s Workforce Housing Statute, became effective. The statute stipulates, “In every municipality that exercises the power to adopt land use ordinances and regulations, such ordinances and regulations shall provide reasonable and realistic opportunities for the development of workforce housing, including rental multi-family housing”.

The REDC supports the ongoing efforts of the Workforce Housing Coalition (WHC) and others to educate and inform public officials, developers, and landowners on the importance of workforce housing to the region’s economy. A growing, vibrant economy needs a range of workers, and housing options. Workforce housing in the REDC region is needed for firefighters, teachers, service workers and public employees.



A place to live should cost no more than **30%** of a household’s income



As a member of the NH Housing Finance Authority Planning Council, Laurel Bistany, REDC’s Executive Director, assists the Finance Authority with the development of a statewide workforce housing plan. Firms that are relocating and/or expanding are finding it difficult to attract workers due to the limited affordable housing opportunities. Several communities in the REDC region have amended land use and development regulations to encourage the creation of workforce housing. Incentives for developers include the ability to build more units on a parcel as long as some of the units are deemed affordable housing.

In the Spring of 2013, the Workforce Housing Coalition of the Greater Seacoast invited nearly 250 employers with 50 or more employees in the Seacoast Region of New Hampshire and Maine to participate in a survey. The purpose of the survey was to assess their perceptions of housing options and challenges in the Seacoast with their employees. One employer in Rockingham County provided the following feedback, “I am also concerned about making sure there is affordable housing for our new college graduates who we want to remain in the state. However, I see more housing issues from employees with families. Many of our new college graduates find a way to live in Portsmouth, but it’s harder for families.”

REDC recently supported a workforce development project in Nashua NH through our Brownfields Remediation Revolving Loan Fund. REDC, in partnership with the City of Nashua, lent a developer funds to cleanup a contaminated mill building which will be developed into 109 rental units, 51% of which will be housing for persons of low to moderate income.

Environmental Preservation



Great Bay, (Image courtesy of Great Bay National Estuarine Research Reserve)

“Fishing and farming families have long recognized how much they have in common. Fishing is a vital part of the heritage and character of New Hampshire’s Seacoast communities. Growing appreciation among residents and visitors alike for local food is creating new demand and marketing opportunities for locally caught fish and shellfish. Customers are clamoring for fresh fish and seafood at farmers markets cross the state, and fishermen are developing other direct retail markets, including adopting the CSA (Community Supported Agriculture) model to provide customers with weekly Community Supported Fisheries shares of locally caught fish. Our local fishing industry lends authenticity to the charms and economic growth of our coastal communities, from Seabrook to Portsmouth. But our local fishing industry is in peril, caught between rising costs and crippling regulatory limits on fishing.”

~Lorraine Merrill, NH Commissioner of Agriculture, Markets & Food

Water Quality in New Hampshire’s Great Bay Watershed

Often dubbed New Hampshire’s “hidden coast,” the Great Bay is unique because it is both a saltwater and freshwater system, or an estuary, set apart from the coastline. The Piscataqua River brings salt water from the Atlantic Ocean into Great Bay with the tides, an essential element for the growth of plant and animals that live in estuaries. Water levels in Great Bay are heavily influenced by these daily tides, which expose mudflats at low tide, providing important feeding grounds for birds and creating unique plant and animal habitats. In recognition of Great Bay’s beauty, diversity and productivity, the U.S. Environmental Protection Agency (EPA) has afforded special protection to it as one of only 28 “estuaries of national significance.”

Seven rivers that carry the pollution from 42 New Hampshire and 10 Maine communities drain into the Great Bay watershed, which comprises 1,023 square miles. The 2013 State of the Estuaries Report, published by the

Piscataqua Region Estuaries Partnership (PREP), shows 15 of 22 key indicators of environmental health in Great Bay exhibit negative or cautionary trends. The report can be found at www.prep.unh.edu. Trends include increases in impervious surfaces in watershed communities – such as parking lots, roadways and roofs – resulting in polluted water and sediment flowing into rivers and the Bay, and an increase in nitrogen and nutrients in the water entering Great Bay. Sources of nitrogen and nutrients include discharges from municipal wastewater treatment plants, effluent leaching from septic systems, fertilizers from lawns and gardens, and more. Problems associated with increased nitrogen and nutrient levels in the water include loss of eelgrass habitat in Great Bay, periodic closures of clam and oyster beds, low oxygen levels in tributary rivers, and increases in nuisance seaweeds. Eelgrass in Great Bay provides critical nursery habitat for fish species in the North Atlantic. Low oxygen levels in rivers negatively impact fish and other aquatic life.

Many communities in the REDC region are participating in critical discussions regarding water quality in Great Bay and its tributaries and associated municipal investment in infrastructure. These discussions also involve state and federal regulators, scientists, environmental organizations, business and industry representatives, and residents. Concerns have been expressed by municipal leaders about the costs associated with improving water quality through municipal investments in infrastructure, such as wastewater treatment plants and stormwater management systems, and the lack of state and federal funds to assist communities with designing, constructing and maintaining such infrastructure. Federal and state funds are not currently available to help reduce the amount money needed to be raised by local government. Leaders in some communities have also expressed concern about the data and science being used to estimate the amount of nitrogen and other pollutants entering Great Bay. The cities of Portsmouth, Rochester and Dover have filed litigation against EPA, challenging the

science being used to determine the need for infrastructure improvements.

Permits to operate wastewater treatment plants in New Hampshire are granted by EPA. Plants operated by the Towns of Newmarket and Exeter have received new permits which require significant decreases in the amount of nitrogen allowed in plant discharges. Wastewater treatment plants in several other watershed communities will also be subject to new permit requirements. As a result, municipalities will need to allocate significant funds to retrofit existing plants or construct new plants. The Town of Exeter estimates it will cost \$40 to \$50 million to build a new plant to meet EPA's new permit requirements. The EPA is requiring the Town to reduce the amount of nitrogen in plant effluent to 3 milligrams per liter within 15 years. Effluent from the Town's treatment plant currently contains approximately 13 milligrams of nitrogen per liter.

Economic development in the REDC region relies on a healthy natural environment coupled with strong and resilient communities. The challenges posed by improving and protecting water quality in the Great Bay will influence public and private sector investment in the region in the coming years.



Cotten Mill Square, a Brownfields Project that will convert a mill building into one- and two-bedroom rental apartments in downtown Nashua NH. (Image courtesy of John Stabile.)

Regional Brownfields Program The US EPA's Brownfields Program provides competitive grants to states, municipalities, tribal authorities, and regional planning and economic development organizations to support the identification, assessment, clean-up, and redevelopment of properties that may be stigmatized by pollution or the

perception of contamination. Such properties can include closed gas stations and auto body repair shops, large manufacturing mills, and commercial or industrial sites. These sites exist throughout the REDC region, in every community, and represent enormous economic development potential. Cleaning up and reinvesting in these properties increases local tax bases, facilitates job growth, utilizes existing infrastructure and alleviates development pressure on undeveloped land in the region.

Brownfields Assessment Programs Currently, two of the four regional planning commissions operating in the REDC region are managing Brownfields assessment programs – Rockingham Planning Commission and Southern New Hampshire Planning Commission. With grant funds from EPA, both planning commissions have created inventories of Brownfields sites and have assessed several of these sites for contaminants and redevelopment options. For current information on these site inventories and on the properties that have been assessed, contact the regional planning commissions – Rockingham Planning Commission, www.rpc-nh.org, 603-778-0885, and Southern NH Planning Commission, www.snhpc.org, 603-669-4664. Both planning commissions submitted grant applications to EPA in November 2012 requesting additional Brownfields funds.

Grant award decisions will be made by EPA in May 2013.

Brownfields Clean-up Program In May 2010, the EPA awarded the REDC \$1M to establish a Revolving Loan Fund (RLF). The RLF is being used to capitalize a revolving loan fund from which the REDC provides low interest loans and sub-grants to conduct clean-up activities on selected Brownfields sites in the region. The RLF funds are available for anyone anticipating cleaning up a contaminated property for redevelopment, as long as the applicant is not responsible for the contamination. Low interest loans, typically 3 percent, are available for expanding businesses, developers, non-profit organizations and municipalities. Sub-grants can only be awarded to municipalities and non-profit organizations. Eligible clean-up activities include the installation of fences

and drainage systems, capping, excavation and removal of contaminated soils, and removal of drums, tanks and other sources of hazardous materials. The REDC is targeting sub-grant RLF funds towards projects that facilitate the creation of green space, benefits low income communities, and facilitate the use of existing infrastructure.

The Town of Hudson, NH has submitted an application to the REDC for Brownfields RLF grant funds for clean-up of



Len Lathrop of Area News Group, sharing the Zach's Field site plans with REDC Board of Directors. (Left to right: Warren Henderson, REDC Chair of Directors; Scott Zeller; REDC Board Member; Len Lathrop, Editor, Area News Group).

a vacant 9.7 acre lot along Industrial Drive in Hudson. The Town is partnering with a non-profit community foundation to clean up and redevelop the site into a recreational park with a football field, baseball field, parking lot, and service building. There are other sites in the region that are candidates for the RLF grant funds and the REDC is working with the Rockingham Planning Commission to encourage grant applications for these sites. For more information on the RLF and the application process, visit the REDC website, www.redc.com, or call the office, 603-772-2655.

The City of Nashua, NH manages a Brownfields Assessment and Clean-up Program for sites in that community. For more information, contact the City of Nashua's Community Development Department at 603-589-3095, www.gonashua.com.

NH Fisheries The NH Fishing Industry just completed its third year of the new fisheries management plan. Prior to 2010 our fisheries were managed by a very expensive effort control system that limited the days fishermen could fish, and the amount of fish they could bring in each day. One of the critical problems with this system was that fishermen were forced to discard large amounts of fish at sea, with many of those fish not surviving. In 2010 the Northeast Marine Fisheries Service implemented Amendment 16 to the Northeast Multi-species Fisheries Management Plan (FMP). This system created a sector management system and authorized the formation of 17 sectors in the

Northeast. Under the new plan, if groups of fishermen were willing to legally bind themselves to one another and agree to an operating plan that included a harvesting strategy to stay under any specific Total Allowable Catch (TAC) imposed by the government for each fish stock, then fishermen would be granted exemptions from the effort control rules and regulations. The harvesting plan that all 17 sector groups in New England developed was one based on a system of individual quotas, trade-able amongst fishermen and amongst sector groups. Initial allocation of quota for each sector group was determined based on the catch history associated with the permits that comprise each sector. New Hampshire was set up with two of these sectors: Northeast Fishery Sector 11 and 12. The two sectors share a board of directors, a manager, trading rules, and joint and several liability. The combined sectors have 54 permits among 24 operators and three NH dedicated permit banks.

A LOOK BACK In the first two years of the new system NH fishermen, their Sector Manager, and dock side support services were unsure how the system would work out. A natural consequence of market based solutions to environmental problems is consolidation of the resource users. The rights to the resource ultimately end up with those who are most capable and capitalized. The NH fleet was committed to keeping the State's historical fishing rights here in New Hampshire. Three initiatives resulted in preserving eight permits in the state and making the quota of those permits available to remaining sector fishermen. First a permit bank was formed via a relationship with NH Fish and Game, who received one million dollars from NOAA to help local fishing communities. Fish and Game purchased four permits that otherwise would have left the



Dan Gray, Managing Director of CEDC, and Laurel Bistany, Executive Director of REDC, join Dr. Josh Wiersma, Manager of the NH Fishing Sector and fisherman Peter Lagerstrom, at the commercial fishing pier in Portsmouth, to deliver the final check for the grant to purchase pingers.



Purchase your CSF share of fresh, local seafood at www.nhcommunityseafood.com.

state. A second permit bank was set up by the sector and funded by Coastal Economic Development Corp. (CEDC) and REDC Regional Economic Development Center (REDC) through various means, but primarily as part of a \$473,000 loan through the US Department of Housing and Urban Development Community Block Grant Program. The sector again purchased two permits that were initially going to leave the State and set them up for access by existing fishermen for a small fee to cover the sector's loan payments. Finally, the sector just finalized a type of "merger" deal with the Nature Conservancy for them to become a member of the NH sectors by purchasing two more permits that otherwise would have left the state. The Nature Conservancy will dedicate the quota from these permits towards fishermen who want to participate in collaborative research projects with marine scientists. These projects are generally geared towards developing more selective gear, towards gathering more information about the ecosystem, and towards better stock assessment.

A second major initiative of the sector was to spearhead the use of a new generation acoustic deterrent device (pingers) used to detract harbor porpoise from fishermen's nets. CEDC and REDC again provided grant funding of \$58,970 which was used to purchase new generation pingers based on LED light technology that alerts

fishermen when they have stopped working. The sectors are requiring NH fishermen to use twice as many pingers as required in order to drive any incidental takes of harbor porpoise down. This past season NH fishermen caught less than a third of the allowable quota of harbor porpoise and their goal is zero bycatch.

The new quota management system has resulted in a great reduction in discards, more flexibility in how NH fishermen

operate, more selective fishing, and spread the fish catch out over more of the year. The 2012/2013 season, however, was difficult for the NH catch for two primary reasons. First, it is impossible for fishermen to know exactly what they are going to catch when they put down their nets. If not careful, fishermen can catch too much of one species and not enough of another. When quota on specific species gets too low the specie becomes a "choke" species, causing the fishermen to stop fishing. With quota leasing, fishermen can buy in more quota of "choke" species to allow them to continue fishing, but the cost of purchasing these fish could actually result in loss on the sale of the fish if the price goes

NORTHEAST FISHERIES SECTORS 11 AND 12 (NH) ALLOWABLE CATCH ENTITLEMENT

Fishing Season June 2012 - May 2013	2012/2013 ACE NH Sectors (lbs)	2012/2013 Actual Landings (lbs)	Percent Landings
Cod - George's Bank East	2,068	303	15%
Cod - George's Bank West	16,126	4,776	30%
Cod - Gulf of Maine	1,266,798	748,825	59%
Winter Flounder - George's Bank	268	32	12%
Winter Flounder - Gulf of Maine	38,141	12,656	33%
Haddock - George's Bank East	5,845	87	1%
Haddock - George's Bank West	20,065	508	3%
Haddock - Gulf of Maine	52,494	18,842	36%
White Hake - Gulf of Maine	349,794	275,495	79%
American Plaice (Dad) - Gulf of Maine	78,285	48,458	62%
Pollock - Gulf of Maine	2,944,024	1,592,509	54%
Redfish - Gulf of Maine	153,441	40,708	27%
Witch Flounder (Grey Sole) - Gulf of Maine	54,287	37,135	68%
Yellowtail Flounder - Gulf of Maine	81,858	66,835	82%
Yellowtail Flounder - George's Bank	411	46	11%
Yellowtail Flounder - Southern New England	75	9	12%
	5,063,980	2,847,224	56%

Source: NH Fisheries Management Sector 11 & 12

NORTHEAST FISHERIES SECTORS 11 AND 12 (NH) ALLOWABLE CATCH ENTITLEMENT

Comparison Fishing Season June 2012 - May 2013 to June 2013 - May 2014	2012/2013 ACE NH Sectors (lbs)	2013/2014 ACE NH Sectors (lbs)	Percent Change
Cod - George's Bank East	2,068	664	32%
Cod - George's Bank West	16,126	12,371	77%
Cod - Gulf of Maine	1,266,798	199,602	16%
Winter Flounder - George's Bank	268	210	79%
Winter Flounder - Gulf of Maine	38,141	28,349	74%
Haddock - George's Bank East	5,845	2,535	43%
Haddock - George's Bank West	20,065	15,159	76%
Haddock - Gulf of Maine	52,494	10,600	20%
White Hake - Gulf of Maine	349,794	328,647	94%
American Plaice (Dad) - Gulf of Maine	78,285	52,633	67%
Pollock - Gulf of Maine	2,944,024	2,142,515	73%
Redfish - Gulf of Maine	153,441	356,660	232%
Witch Flounder (Grey Sole) - Gulf of Maine	54,287	22,316	41%
Yellowtail Flounder - Gulf of Maine	81,858	21,846	27%
Yellowtail Flounder - George's Bank	411	4	1%
Yellowtail Flounder - Southern New England	75	197	263%
	5,063,980	3,194,309	63%

Source: NH Fisheries Management Sector 11 & 12

down after purchasing the quota. It is a very complicated trading system and something fishermen are continuing to learn how manage. As a result the fleet did not fill quota on a number of species. A second concerning factor is that cod and haddock, and to some extent Pollock, just did not show up this season. As can be seen in the table below overall the two NH sectors only caught 56% of their allowable quota.

A LOOK FORWARD The 2013/2014 season opened with the troubling news that the Allowable Catch Entitlement (ACE or Quota) for the Northeast Region was drastically cut by the NMFS, due to concern of the health of some stocks. The table above shows the drastic cuts.

The critical reductions are to Gulf of Maine Cod, Haddock and Pollock. Many fishermen believe it will be nearly impossible to fish for the allowable species without catching too many of these three critical species. They also feel they simply cannot make a living catching such small quantities of cod and haddock which are two of the most valuable species that they catch. Already the number of boats fishing in the 2013/2014 season for these regulated species has dropped from 24 boats to 14. Thus far no NH boats have sold their permits, they are just leasing their quota. A new rule this year allows fishermen from the two NH sectors first right to bid on the available quota before out of state interest can bid. To date the sector has been able to buy in

an additional 50,000 lb of cod for NH fishermen still fishing. While some of the boats leaving the regulated fisheries have decided to tie up or sell their boats, some have shifted their focus to other fisheries, including lobster, scallops, dogfish and skate.

On the upside fishermen, the sector manager, land base processors, UNH Cooperative Extension staff, and area chefs have come together to form an alliance to bring greater awareness to NH local caught fish. A branding campaign, titled New Hampshire Fresh and Local Seafood, was launched this spring. Efforts are being made to keep NH fish local. Currently one boat sells their harvest, including northern shrimp, sea scallops and squid directly off the boat to consumers. A multi-stakeholder model formed as a collaborative between fishermen and consumers, called New Hampshire Community Seafood, has just been formed to launch a Community Supported Fishery (CSF), in which consumers will buy shares and receive two pounds of different fish over eight consecutive weeks. There will be an emphasis on showcasing more under-utilized species such as redfish, dogfish and whiting as well. Another local lobster company is making value-added seafood products, including lobster ravioli and bread haddock bits, and marketing to NH restaurants. All these initiatives are intended to bring greater price per pound to the local seafood community as a way to offset the drastic cut in landings.

Developing a Secure Energy Future

In today's energy market, plentiful natural gas has emerged as a less expensive alternative to coal, oil, and nuclear for generating electricity. The immediate result has been lower energy costs for consumers; however, long-term dependence on any single energy fuel source—especially natural gas—puts New Hampshire and the region at high risk when it comes to ensuring the lights and heat stay on during times of greatest demand. The uncertainties of supply, transportation and infrastructure interruptions, and market price fluctuations can become critical, especially during prolonged heat waves or cold snaps.

A February 15, 2012 feature article in the New York Times took an in-depth look at the volatility in natural gas prices and the impact it has had on electricity prices in New England's energy market—most recently, the winter of 2012-2013. The article notes that while the boom in shale gas discoveries has pushed prices to historic lows, our region's increasing dependency on natural gas, coupled with limited pipeline capacity, make us vulnerable to price volatility. Indeed, this scenario unfolded during a prolonged cold snap in January 2013 that brought lower than average temperatures to New Hampshire and the region for several weeks.

Our growing reliance on natural gas as fuel for generating electricity has also been a concern for ISO-New England—the not-for-profit independent system operator that manages the region's wholesale energy supply market. Based on its own recent research, ISO-New England has concluded that our over dependence on natural gas “is one of the region's highest priority strategic risks” due to such factors as inadequate pipeline capacity, pipeline repair/malfunction interrupting supply, and limited on-site fuel storage for gas-fired generators.

Accentuating its concerns, a recent ISO-New England study notes, “Existing natural gas infrastructure is sufficient to meet electric power system demand only from 2014-2017, assuming typical operating conditions...for higher demand scenarios...natural gas-fired electric generation demand

cannot be met with the available natural gas transportation capacity.” ISO-New England adds that New Hampshire and the region have faced several challenging electric grid operating conditions over the past ten years related to the availability of natural gas generation to meet demand—especially during prolonged periods of heat and humidity or extreme cold.

The way forward to a secure energy future for New Hampshire should include a variety of renewable energy solutions, such as wind, solar, biomass, and hydroelectricity, to complement a clean, reliable fossil fuel portfolio.

Long-term, however, business and government leaders working together

to develop a proactive vision and policy for energy security and reliability is New Hampshire's best hope for ensuring we are not held hostage by a single-source energy supply in the years to come. A broad-based, cooperative strategic initiative—one that employs a variety of reliable energy solutions—will ensure that New Hampshire has flexibility and reliability in energy generation, even under the most uncertain conditions.

Working Landscape of Farms and Forests

Farming and forestry were once predominant land uses across New Hampshire, including the REDC region. Increasing population has led to residential and commercial development encroaching on agricultural activities that can often be regarded as incompatible with housing subdivisions and retail centers. Common practices of the working landscape, such as fertilizing fields and timber harvesting, may be seen by many as detrimental to property values when conducted near residential developments. Municipal land use regulations have been adopted to deal with such conflicts, resulting in regulations that may restrict backyard farming and the production of local food and forest products.

The past decade has seen a strong interest in purchasing locally grown food and other agricultural products. This interest can be seen in all areas of the food system, from

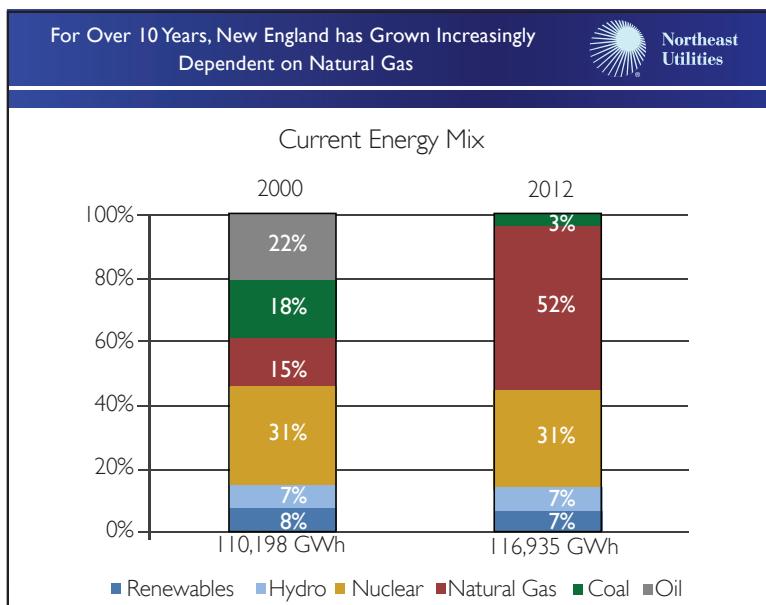


Chart Source: PSNH

increased demand for local foods in grocery stores, farmers' markets and restaurants to the establishment of local Agricultural Commissions by municipal governments. New Hampshire residents are asking for food that has been produced locally for a wide variety of reasons, including health and wellness, support for local farmers, and increasing the amount of food produced in the state to stabilize supply. The ice storms of 2008 and 2010 revealed that at any given time New Hampshire has only a three-day supply of food on hand. UNH Cooperative Extension estimates that 3–4% of food consumed in New Hampshire comes from local sources.

According to the 2007 US Census of Agriculture (the most recent data available), agriculture provides 11,606 jobs in New Hampshire and contributes \$43.8 million in tax revenue (http://www.agcensus.usda.gov/Publications/2007/Full_Report/Census_by_State/New_Hampshire/index.asp). Notable economic data about New Hampshire agriculture includes:

- New Hampshire ranks 1st in the nation in direct sales of farm and forest products to consumers; 23% of New Hampshire farms sell directly to consumers versus 6% of farms nationally.
- In the REDC region, Hillsborough County ranks 37th (\$3,706,000) and Rockingham County ranks 38th (\$3,685,000) out of 3,130 counties in the US in the value of direct market sales.
- New Hampshire ranks 3rd in the nation in the percentage of total market value of agricultural sales from direct sales to consumers.
- The amount of land in the REDC region dedicated to agriculture, including forestry, increased between the 2002 and 2007 Census of Agriculture. Agricultural acreage in Hillsborough County in 2007 was 50,238, up from 40,104 acres in 2002. Agricultural acreage in Rockingham County in 2007 was 33,570, up from 31,656 in 2002.
- The number of farms in New Hampshire increased 24% between 2002 and 2007, from 3,363 farms to 4,166 farms. The amount of land in agriculture also increased by 6%, from 444,879 acres to 471,911 acres. Farm size during this period decreased 14%, from 132 acres per farm in 2002 to 113 acres per farm in 2007.
- The number of farms in the REDC region grew between 2002 and 2007. The number of farms in Hillsborough County increased from 481 to

615. In Rockingham County, the number of farms increased from 445 to 594.

This data highlights the persistent trend of New Hampshire residents discovering the value of the working landscape of farms and forests. A 2010 report by the University of New Hampshire's Food Solutions New England entitled, "Home Grown: The Economic Impact of Local Food Systems in New Hampshire" (http://agriculture.nh.gov/publications/documents/HomeGrownReport_final.pdf) discusses the economic development opportunities presented by expanding the local food system. These opportunities include increasing the amount of food manufactured in the state, and increasing the profitability of New Hampshire's small and fragmented farm system. Specific examples of the many opportunities to expand the local food system include: increased aquaculture, meat and dairy production, and specialty food products. Opportunities to share knowledge with positive economic impact include: business and entrepreneurship education and mentoring, and food safety certification. The report states, "Policies devoted to local agriculture specifically need to take into account that there are many, smaller farms with small contributions to overall local agricultural profit and that only a few, larger farms constitute the majority of local agriculture profits."



The Root Seller: Comte Family Farm in Nottingham NH (Courtesy of Comte Family and Joan Zelonis).

Changes in the Region

Since the publication of the 2010 CEDS, new demographic and economic data for the Region, State and Country has become available. The purpose of this section is to provide an annual update of the best available data. In addition, the new data has been incorporated into the appropriate data summary tables found in the Appendix. Specifically, updated or supplementary information had been added in the areas of population, housing price data, employment, unemployment and wage data, employment reductions from layoffs, property valuations and tax rates, household income and education attainment. This information is summarized in narrative form below.

Population Counts The NH Office of Energy and Planning (NH OEP) publishes population estimates for New Hampshire cities and towns on an annual basis. The annual estimates are based on survey responses received from cities and towns regarding numerical changes in constructed housing units (both additions and demolitions). Results are converted to population estimates based on current person-per-household data. As such these are not enumerated counts as compared to the Census, but annual estimates based on building permits. The results are calibrated to the US Census counts of housing units in decennial census years. New population estimates are typically available in the summer or fall of the following calendar year. At the time of writing this document, the NH OEP 2011 population estimates are the best available information.

The 2011 estimates are provided in Table A-1 of the Appendix. These figures are an estimate for July 2011. According to the estimates, the REDC region experienced an estimated net growth of 6 individuals between 2010 and 2011. There was no substantial population growth in any of the subregions. This mirrored the data for the State of NH as well.

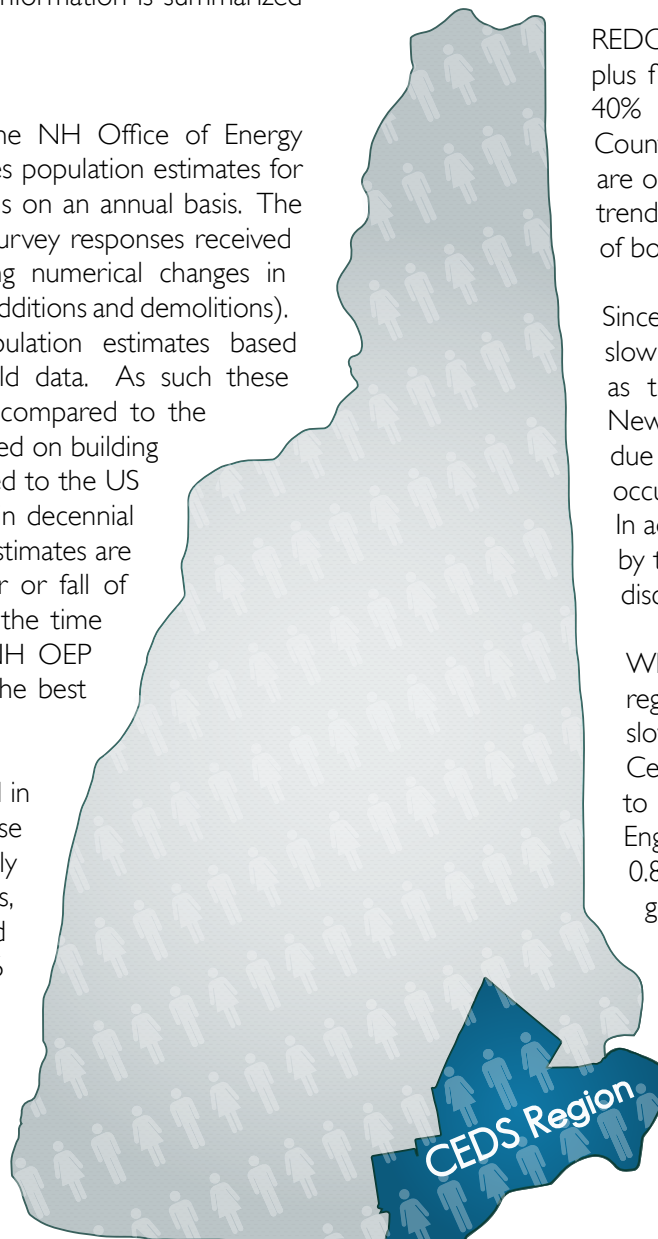
REDC Regional Demographic Trends & Impacts

Early in 2013 the nine New Hampshire Regional Planning Commissions, working on behalf of the NH Office of Energy and Planning, contracted with RLS Demographics, Inc. to produce the first post-2010 Census set of population projections for the state and the ten NH counties. REDC contracted with noted demographer, Peter Francese to analyze this recently released data and discuss possible economic impacts to the REDC region. His findings are presented in this section.

REDC serves all of Rockingham County plus five communities that cover about 40% of the residents of Hillsborough County. Since population projections are only published for county totals this trends and impact analysis will be for all of both counties.

Since 2000 population growth has been slowing in the REDC region as well as throughout New Hampshire and New England. Slowing growth is partly due to the lack of job growth that occurred during the Great Recession. In addition, tighter land use restrictions by towns have also slowed growth by discouraging housing development.

Whatever the reasons, the REDC region is within one of the nation's slowest growth areas. From the Census count in April of 2010 to mid-2012, for example, New England's population increased just 0.82% compared to the national growth rate of 1.67%. Over that same period Hillsborough County's population edged up just 0.55%, while Rockingham County's population went up 0.88%. But even that meager growth rate made it the most rapidly growing county in New Hampshire.



The primary reason for the difference in population growth rate between these two counties is domestic migration. Among the ten New Hampshire counties Rockingham County had the highest net in-migration, resulting in an addition of 3,400 people since the 2010 Census. By contrast Hillsborough County had a net loss of about 1,200 out-migrants since 2010, the largest loss of any county in the state.

Both counties, however, gained residents from immigration and natural increase (births minus deaths). From the 2010 Census to mid-2012 Hillsborough gained 2,200 immigrants plus 3,500 from natural increase, the highest numbers of any county in the state. During the same period Rockingham County came in second in the state in both categories by gaining 600 immigrants plus 900 people from natural increase.

Nevertheless the annual population growth rate in both counties is below what it was from 2000 to 2010. During that decade Hillsborough's population grew an average of 0.52% per year while Rockingham's population went up an average of 0.64% per year. Recent population projections done for New Hampshire counties forecast a continuation of the extremely slow population growth described above.

Such slow and falling growth rates means that the REDC region's population will be aging more rapidly than it would if growth rates were higher or rising. But another contributing factor to this aging has been the out-migration over the past decade of young adults in the child bearing age range. This has meant a decline in numbers of children and consequently a sharply rising median age.

The chart below shows the percent of the population in Rockingham and Hillsborough counties (combined) in each age group as they compare to the U.S. average. If Rockingham and Hillsborough counties were similar to the rest of the nation, all the numbers would be about 100. What the chart shows is that the REDC region has significantly fewer children and young adults under age 35 than if the region were more typical of the nation. The chart also shows that this region has a well above average percent of its population in the 45 to 64 age range.

Having an unbalanced age distribution such as this has short- and long-term implications. In the short term it may have positive economic benefits because household income is at its highest within the 45 to 54 age group, where the index is 23% above average. Household income can also be above average in the 55 to 64 age group where spending on household goods and services is well above average.

The below average and falling numbers of children means that school districts will come under increasing pressure to reduce spending as enrollment falls. But most will be unable to do so because of high fixed costs. As school property taxes rise due to increased educational costs per student, there may be greater efforts made to consolidate smaller school districts into larger ones to save administrative costs.

The biggest implication of the age comparison to the nation shown below can best be seen by looking at the following chart, which shows the projected population change in each ten year age category of the two-county region's age distribution over past five years and for next five years.

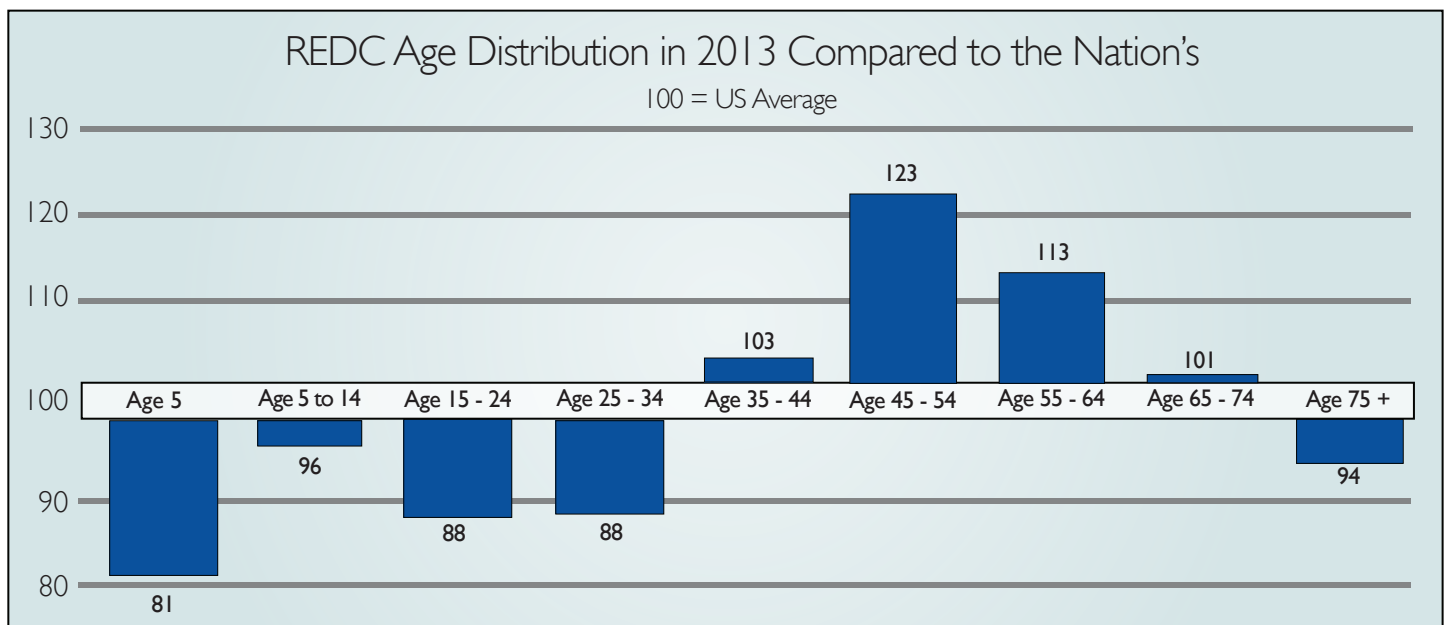


Chart Source: Preliminary NH OEP & NH Regional Planning Commission's Spring 2013 population projections

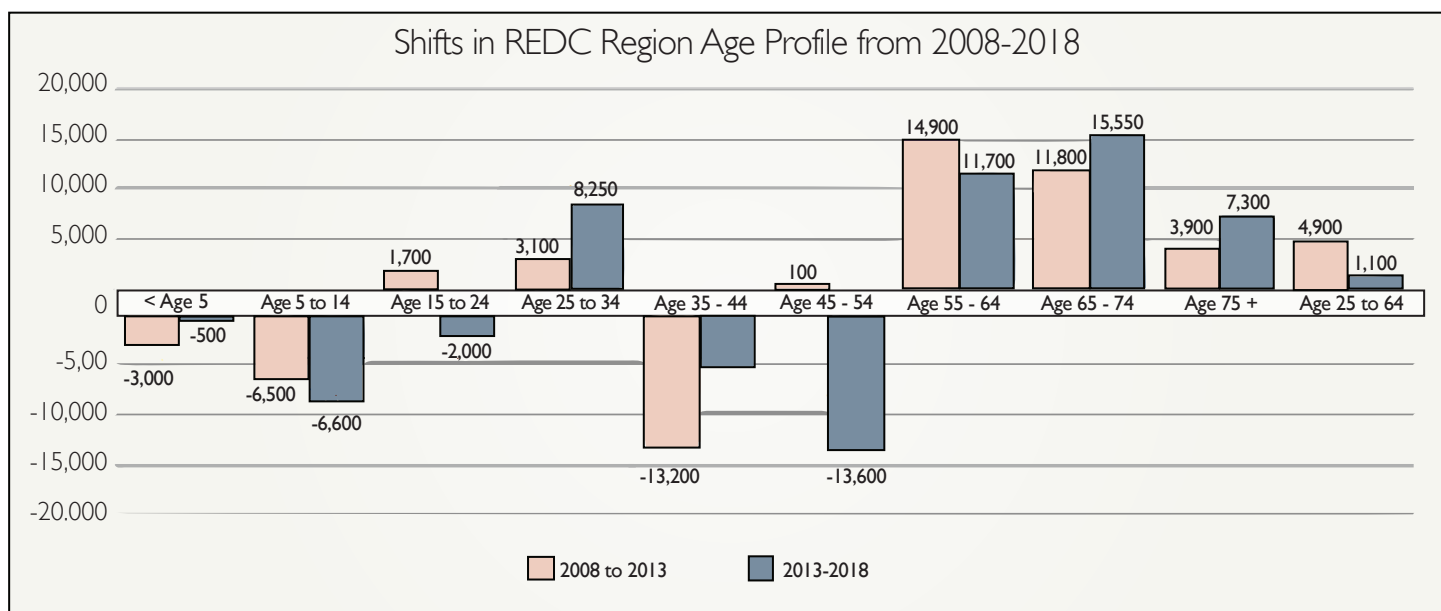


Chart Source: Preliminary NH OEP & NH Regional Planning Commission's Spring 2013 population projections

The chart above shows three important trends unfolding in the REDC region. The first is the decline in the number of school age children, which has been occurring for some years, and is projected to continue for at least the next five years. That decline is driven in part by the sharp drop in the number of parents in the 35 to 44 age range, but the rate of decline is projected to slow over the next five years.

A shrinking population of school age children will likely mean less school construction and may even result in consolidation of school districts or possibly closing of one or more elementary schools. This would not be an economically desirable outcome because it may reduce employment in the education sector and may even result in more parents moving to other locations where schools are newer.

Another concern is the projected sharp decline in the number of people ages 45 to 54 years old because household income and household spending on a vast array of consumer goods peaks in this age group. For example, average annual household spending on all consumer goods and services is a full \$10,000 higher per household for this age group than it is for households of all ages.

But perhaps the most important implication of the five-year projection shown in the charts above is that among all the age groups that are forecasted to grow, the vast majority of the growth is among people nearing retirement or in the traditional 65+ retirement ages. This means we should expect extremely low workforce growth in future years.

The closer labor force growth is to zero the more important it becomes to increase programs aimed at workforce development. Future economic growth in this region may depend heavily on future workers having superior job skills to offset the adverse effects of their reduced numbers. More highly-skilled workers will earn higher wages that drive economic growth, even if their numbers do not increase.

Finally, the very high growth in the REDC region among people ages 65 and over will mean high growth in the service sector, including healthcare. There will also be a rising demand for home maintenance, home repair and other services related to helping older people do things that they can no longer do for themselves.

The demand for service workers such as nurses, home health aides and maintenance workers will probably increase rapidly over the next five to ten years. All of these workers will need a place to live, but there is already a severe shortage of workforce housing. Housing is a key component of future economic development that is often overlooked, and in this region, as well as the rest of the state it is an essential part, which if overlooked will be a significant drag on the region's economic health.

Population Projections for New Hampshire Counties Early in 2013 the nine New Hampshire Regional Planning Commissions, working on behalf of the NH Office of Energy and Planning, contracted with RLS Demographics, Inc. to produce the first post-2010 Census set of population

POPULATION PREDICTIONS FOR NEW HAMPSHIRE COUNTIES

	2010	2015	2020	2025	2030	2035	2040
New Hampshire	1,316,470	1,330,834	1,359,836	1,388,884	1,412,041	1,425,357	1,427,098
Belknap	60,088	60,671	62,678	64,460	65,8526	6,796	67,269
Carroll	47,818	48,377	50,115	51,945	53,484	54,522	54,997
Cheshire	77,117	77,128	78,052	79,085	79,861	80,381	80,471
Coos	33,055	32,292	31,791	31,233	30,442	29,461	28,209
Grafton	89,118	89,666	91,614	93,224	94,359	95,018	95,275
Hillsborough	400,721	405,380	414,356	423,117	429,776	433,266	433,381
Merrimack	146,445	148,043	150,652	154,354	157,495	159,377	159,845
Rockingham	295,223	299,277	306,867	313,619	319,065	321,840	321,226
Strafford	123,143	125,489	128,219	131,197	133,867	135,972	137,176
Sullivan	43,742	44,511	45,492 4	6,650	47,840	48,724	49,249

Source: Preliminary NH OEP & NH Regional Planning Commission's Spring 2013 population projections

projections for the state and the ten NH counties. The table above summarizes the preliminary report findings.

The data tells us that the population growth rates for the two REDC counties, as well as the entire state, are projected to decline to zero over the twenty year period following the 2020 Census. The predicted decline in growth rate is illustrated in the chart below.

When population growth rates approach zero it means that there will be virtually no workforce growth along with rapidly increasing numbers of elderly. That combination will almost certainly have serious negative long-term economic consequences.

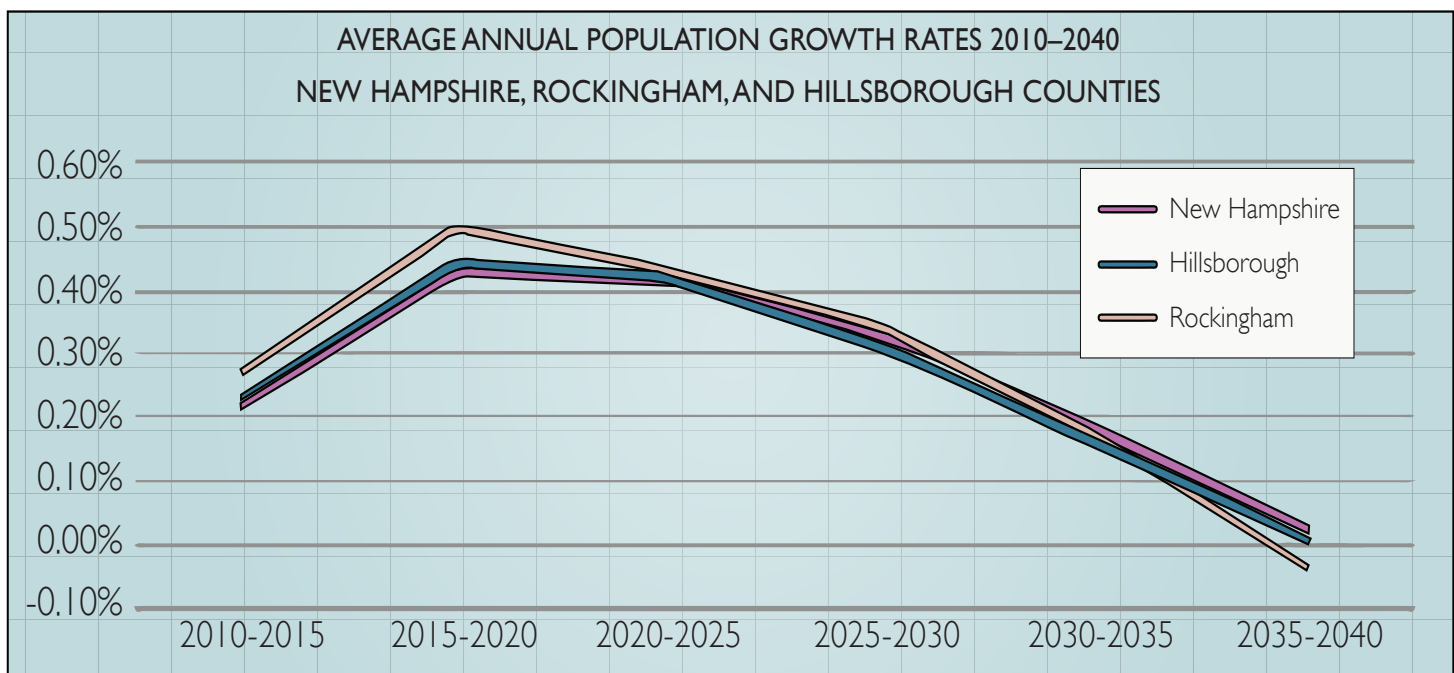


Chart Source: Preliminary NH Office of Energy & Planning and NH Regional Planning Commission's Spring 2013 population projections

Housing Supply In the past, REDC has used housing estimates provided by NH Office of Energy and Planning (OEP) to monitor changes in housing supply for our region. Unfortunately, due to staffing reductions in 2011, NH OEP stopped updating the housing estimates starting with the 2010 data. Therefore, the American Community Survey data is replacing the OEP estimates. Table B-1 of the Appendix lists housing estimates for 2010 and 2011 (the most recent year available). Because they are two different methodologies of estimation, the ACS and OEP data cannot be used for historical comparison.

Based on the US Census data, the annual growth rate of housing units between 2000 and 2010 was roughly 1% in the REDC region and 1.2% for the State of NH. Looking at the ACS data, the annual growth rate from 2010 to 2011 was slightly less than that for both the region and the State, as shown in the table below. What is most interesting about the change from 2010 to 2011 is that although the annual growth rate for the overall number of units was about 1% or less in all subregions and the State, the annual growth rate of vacant units is 3.5% for the region and 3.3% for the State. This implies that as new housing units are being constructed, not all of the existing units are being reoccupied. The stagnant population growth rate in our State and region support this conclusion.

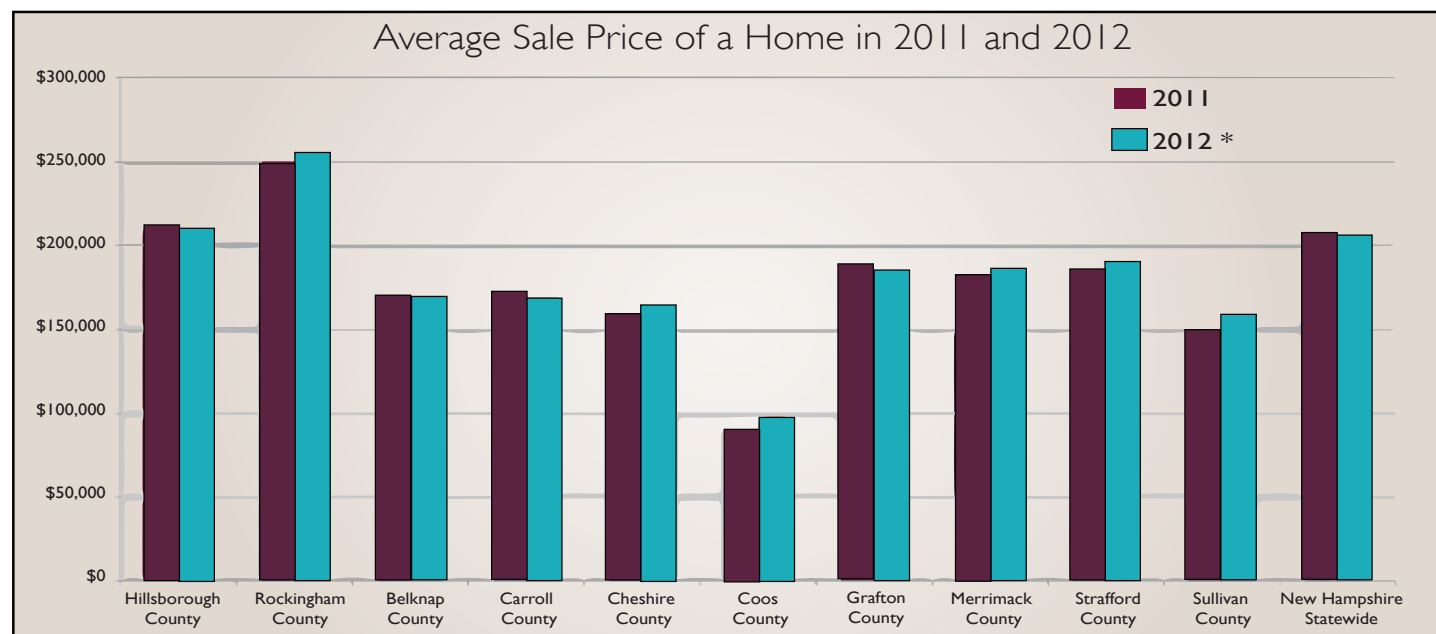
CHANGE IN ACS HOUSING ESTIMATES FROM 2010 TO 2011

	Housing Counts		Occupied Units		Vacant Units	
	difference	percent	difference	percent	difference	percent
CEDS Eastern Towns Totals:	-90	-0.2%	-251	-0.6%	161	2.8%
CEDS Central Towns Totals:	404	1.1%	232	0.7%	172	6.4%
CEDS Western Towns Totals:	762	0.7%	622	0.6%	140	2.7%
REDC CEDS Region Totals:	1,076	0.6%	603	0.3%	473	3.5%
State of NH Totals:	4,158	0.7%	1,065	0.2%	3,093	3.3%

Source: American Community Survey, US Census Bureau

Housing Purchase Prices NH Housing Finance Authority (NHHFA) compiles a housing purchase price database annually for new and used homes, condominium and non-condominium sales. Summarized results for all counties in the State are presented in Table B-4 of the

Appendix. The values for 2012 are preliminary values for the first three quarters from 2012. In addition, town-by-town results for REDC Region and counties covering the 12-month period from January 2012 – December 2012 are presented in Table B-5. Note: the values reported for



Data Source: NH Housing Finance Authority Purchase Price Database

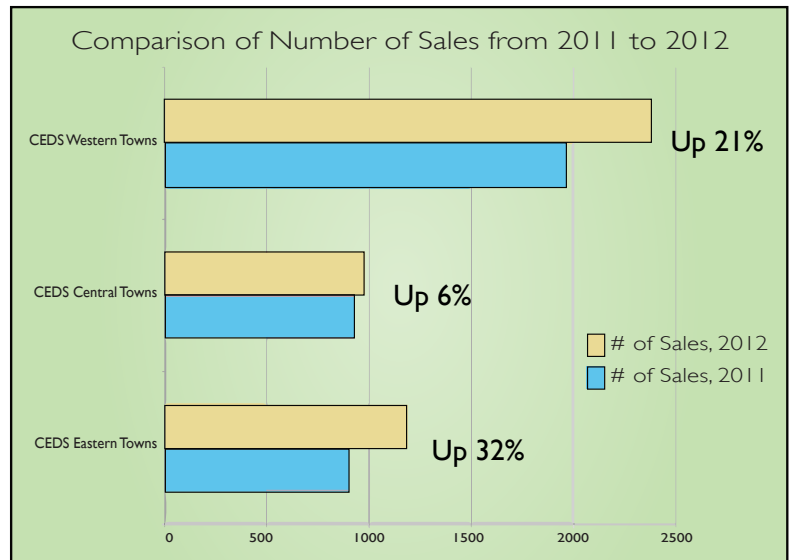
*The values listed for 2012 are the preliminary values for the first three quarters. These numbers may be adjusted slightly once final sales are reported.

2012 are the preliminary year-end values and may be adjusted slightly once final sales are all reported.

As shown in the chart on the previous page, the average sale price of a home (new or existing) remained fairly flat when compared to 2011 values. With the exception of Coos and Sullivan Counties, the percent change in price from 2011 to 2012 was within a +/-5% window. In 2012, the highest median sales price for all homes was once again in Rockingham County, with an average cost at \$255,000. This is up \$5,000 or 2% from 2011. Once again, the second highest median sales price was in Hillsborough County at \$209,900. Both counties in the REDC region were the only two above the State median sales price of \$205,000. Overall sale prices are down on average 20% in the five year period from 2007 to 2012 for each of the counties in New Hampshire, with a statewide decrease of 19% over the past five-years.

The NHHFA reports that 4,549 sales were completed within REDC Region during 2012. This represents an increase of approximately 750 sales or a 1% increase from 2011. Of the sales reported, 88% (4,022) were existing homes and only 12 percent (528) were new construction. The ratio of existing home sales to new home sales is the same in 2012 as it was in 2011. Over 50% of the sales were made in the western subregion, where the population is most dense. The distribution of sales during 2012 is illustrated in the chart, below.

The median transaction price for all homes in the Region was \$255,043 in 2012, which is a 1% increase from 2011. The



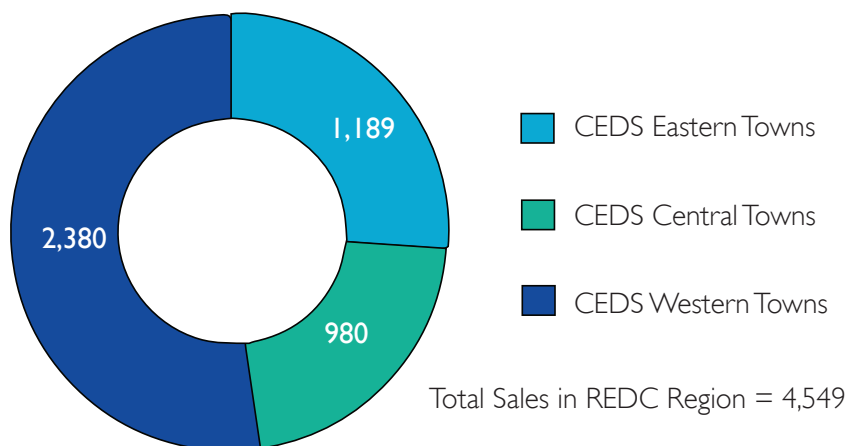
Data Source: NH Housing Finance Authority Purchase Price Database; CEDS Subregion Sales Prices based on weighted averages

highest median price for all sales was once again recorded in the town of New Castle at \$972,500 for 21 transactions, and the lowest median price was recorded in Northwood at \$155,000 for 31 transactions. At \$328,957, the average transaction price for a home sale in the Eastern subregion was approximately \$100,000 greater than the average sale price in either of the other two regions (\$236,549 in the Central subregion, \$225,733 in the Western subregion). It should be noted that calculations based on sample sizes less than 50 are considered highly volatile and only 64% of the REDC Region communities reported over 50 sales during 2012. In addition, the REDC regional and subregion totals are based on weighted averages of all reporting communities.

The year-to-year change in new home prices is extremely volatile due to the small sample size. For example, the Town of Pelham experienced a 32% increase in the purchase price of new homes from 2011 to 2012, but the sample size was only 20 homes. Similarly, the Town of Brentwood witnessed over a 46% decrease in new home sale prices from 2011 to 2012, but there was only one new home sale reported. Overall the change in sales price of homes in each subregion remained fairly flat.

The most recent purchase price surveys indicate that the significant cooling of the housing market in the state and region experienced over the past few years may be reversing. The chart above illustrates that all home sales increased from 2011 to 2012 across all subregions. The eastern subregion experienced the greatest percentage

Number of Home Sales in 2012



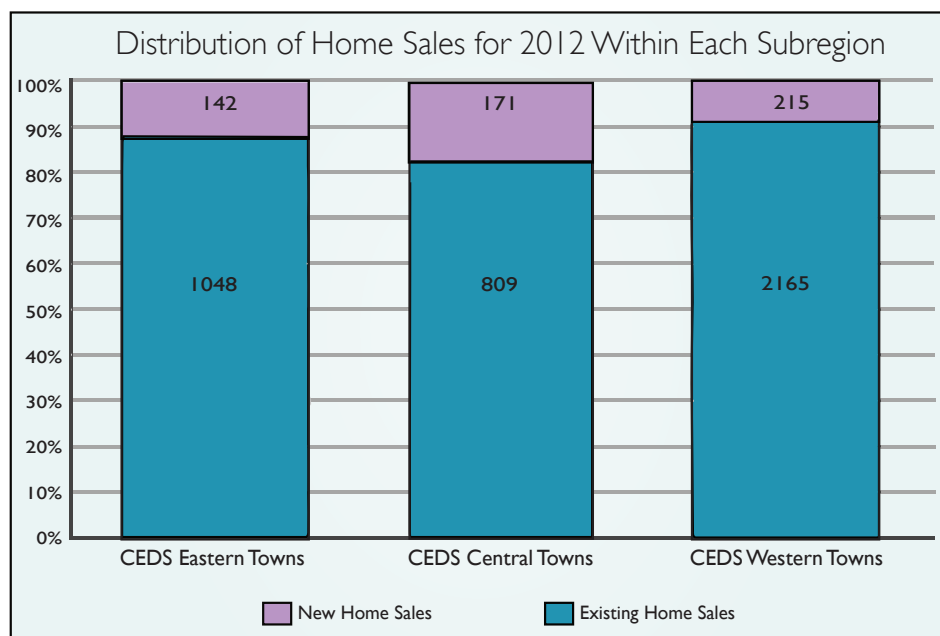
Data Source: NH Housing Finance Authority Purchase Price Database.

* The values listed for 2012 are the preliminary year end values. These numbers may be adjusted slightly once final sales are reported.

Changes in the Region

increase (32%) with the western subregion having the greatest number of new sales at 416 sales. The State of New Hampshire also reported a double-digit increase at 19% more sales in 2012 than 2011.

The chart to the right shows the distribution of each type of home sales (new, existing) that make up the total number of home sales within each REDC subregion. The western subregion had the greatest number of sales during 2012 (2380 sales), followed by the eastern then central subregions (1189 and 980 sales, respectively). This stands to reason since the largest population and available housing stock is within the western subregion. In all three subregions, the sale of existing homes far outpaces that of new construction, with the central subregion having a larger percentage of new construction sales (18%) when compared to the other two subregions (eastern at 12% new sales and western at 9%). This could be attributed to the fact that the Central subregion has more undeveloped land than the Eastern and Western subregions.



Source: NH Housing Finance Authority Purchase Price Database; CEDS Subregion Sales Prices based on weighted averages

“Workforce housing remains an important subject even though it appears that housing is more affordable. While housing prices have come down, they still remain out of reach for many in New Hampshire’s workforce. The costs to rent an apartment have remained high and low vacancy rates make affordable places to rent difficult to find close.

For years workforce housing advocates have worked tirelessly to help elected officials and members of the community about the connection of housing supply to economic development. Where employees live and what a house or apartment costs concern employers in New Hampshire and factor into prospective new businesses decision to come to New Hampshire. Without an adequate and diverse supply of attractive housing that is affordable to a range of incomes, the state’s businesses will find it challenging to retain current workers and recruit new employees. Much of the workforce is highly mobile. Having a range of housing options that people desire and can afford will support a business environment that allows employers a greater opportunity for success.”

~George O. Reagan, Housing Awareness Program Administrator - New Hampshire Housing

Housing Rental Prices The NH Housing Finance Authority also collects data on the average monthly price of a rental unit. In 2012, the highest average monthly rental price was in the Eastern subregion at \$1,357 per month. For communities reporting data in this subregion (7 communities), the lowest average rental was in Hampton at \$1,090/month and the highest was in Stratham at \$1,758/month. Monthly costs were not as high in the other two subregions. The Central subregion rates ranged from \$685/month to \$1,141/month, while the Western subregion prices ranged from \$874/month to \$1,195/month. The table to the right summarizes the 2012 average monthly rental prices.

AVERAGE RENTAL PRICES

TOWN/AREA	2012 Monthly Rental Prices
Eastern Subregion	\$1,357
Central Subregion	\$914
Western Subregion	\$1,072
REDC CEDS Region	\$1,113
Hillsborough County Totals:	\$1,067
Rockingham County Totals:	\$1,070

Source: New Hampshire Housing Finance Authority (NHHFA)

Deed Foreclosures Real Data Corporation publishes summaries of New Hampshire real estate sales and other public records. This includes foreclosure data for both Hillsborough and Rockingham Counties and the State of New Hampshire. The table below summarizes the annual number of foreclosed deeds in the three sub-regions of the REDC Region, as well as county- and state-wide information. In addition, Table B-7 in the Appendix lists the foreclosure data on a town-by-town format.

After a decline in the rise of foreclosures in 2011, the table demonstrates that there was an increase in the number of foreclosures between 2011 and 2012. The number of foreclosures edged up slightly within the REDC region (9%) and is still under the peak witnessed in 2010. The largest number of foreclosures during 2012 occurred in the Western subregion, which is expected since it also has the largest housing stock in the region (92,777 housing units per the 2011 ACS). The Eastern Subregion was the only subregion to have a decrease in the number of foreclosures, down four foreclosures, which is 3%.

FORECLOSURES IN THE REDC REGION & STATE

Town/Area	Number of Foreclosures				Year-to-Year Change			% Change
	2009	2010	2011	2012	2009-2010	2010-2011	2011-2012	2011-2012
CEDS Eastern Towns	156	181	152	148	25	-29	-4	3%
CEDS Central Towns	278	343	273	286	65	-70	13	5%
CEDS Western Towns	630	715	556	637	85	-159	81	15%
REDC CEDS Region	1064	1239	981	1071	175	-258	90	9%
Hillsborough County	1044	1172	933	1078	128	-239	145	16%
Rockingham County	686	820	680	710	134	-140	30	4%
New Hampshire	3467	3953	3146	3768	486	-807	622	20%

Source: Real Data Corp, Compiled by New Hampshire Housing Finance Authority

Employment and Wages Hillsborough and Rockingham Counties continue to be the hub of employment for the State of New Hampshire. In 2011, the two counties had 20,952 establishments, which was up 0.6% from 2010 and is 48% of the State total. In addition, the two counties had an average annual employment of 318,615 jobs, which is 53% of the State total. A summary of employment units (establishments), average employment and average weekly wages by industry classification for Hillsborough and Rockingham Counties, as well as the State of NH, is found in Table C-2 of the Appendix. This table has been updated with data from 2011, the latest available from the Labor Market Information Bureau of the NH Department of Employment Security (as of May 2013).

Table C-3: Employers, Employment & Wages by Town in the Appendix looks at similar data for establishments, employment and wages but at a town level rather than by industry class. Unfortunately, the most recent annual data is

from 2011. A summary of that information for the Region, Counties and State is provided the table, below. In 2011, the region reversed its downward trend in number of jobs and establishments. From 2010 to 2011, the REDC region gained an additional 3,862 jobs and 264 establishments. In 2010, the hardest hit subregion was the Eastern subregion, where there was a loss of 227 establishments and a net loss of 1,282 jobs. However in 2011, the Eastern subregion made the greatest percent turn around and gained 236 establishments and 2,170 jobs.

Tables C-3 and C-5 in the Appendix include weekly wage information in addition to the employer and employment data already discussed. The Appendix tables show changes in numbers of employers, employees and average wages from 2010 and 2011. (Although we present the data town-by-town, and summarized by CEDS subregion, it should be noted that some data is suppressed in smaller communities or where a single employer makes up more than 80

Changes in the Region

ANNUAL ESTABLISHMENTS AND EMPLOYMENT COUNTS FOR REDC REGION, COUNTIES & STATE OF NH

Region/State	2010		2011		# Change: 2011 - 2012		% Change: 2011 - 2012	
Town/Area	Establishments	Avg. Annl. Employment	Establishments	Avg. Annl. Employment	Establishments	Avg. Annl. Employment	Establishments	Avg. Annl. Employment
CEDS Eastern Towns	4,420	64,433	4,656	66,603	236	2,170	5.3%	3.4%
CEDS Central Towns	2,093	22,118	2,105	22,332	12	214	0.6%	1.0%
CEDS Western Towns	7,315	119,874	7,331	121,352	16	1,478	0.2%	1.2%
REDC CEDS region	13,828	206,425	14,092	210,287	264	3,862	1.9%	1.9%
Hillsborough County	11,063	184,628	11,094	186,437	31	1,809	0.3%	1.0%
Rockingham County	9,754	131,892	9,783	133,444	29	1,552	0.3%	1.2%
New Hampshire	43,778	600,540	44,113	605,864	335	5,324	0.8%	0.9%

Source: NH Dept. Of Employment Security, Labor Market Information Bureau

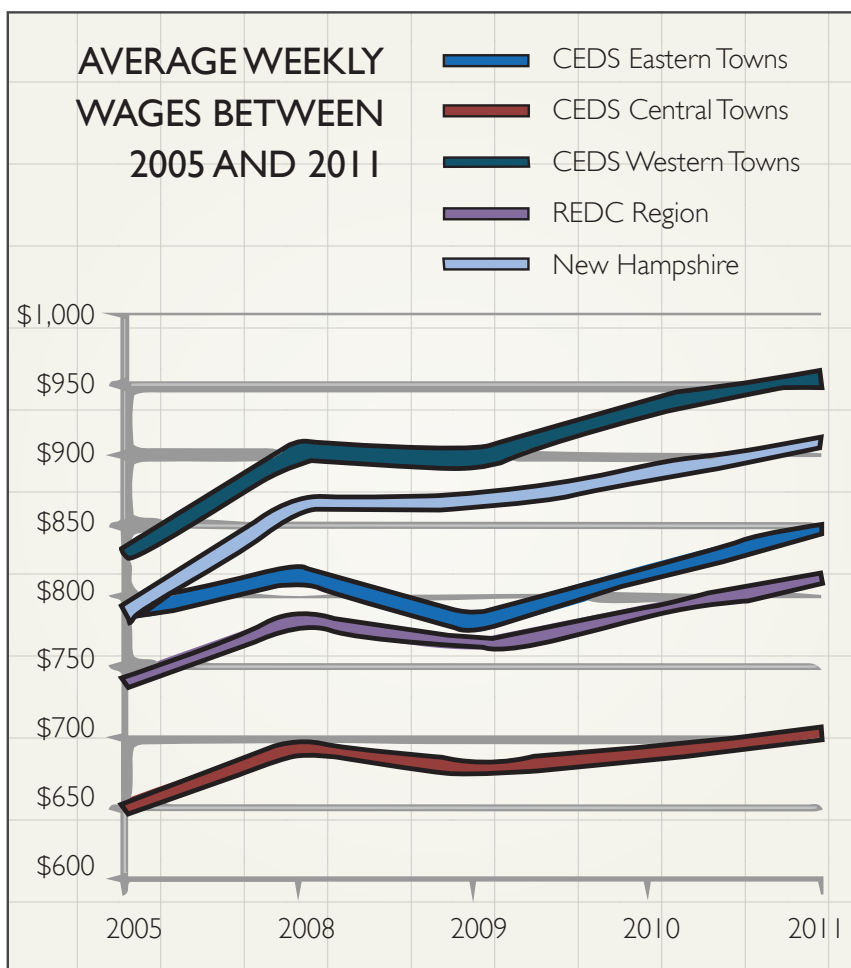


Chart Source: NH Dept. of Employment Security, Labor Market Information Bureau.

* Note: Weekly wages is based on all reporting jobs from both private and government sector.

percent of the collected data. This means that the subregional totals do not always add to the County totals. In addition the wage information for the subregions and the Region is an average of the individual town data, not a true average of all wages.)

The chart to the left outlines the average weekly wages for the Region and State from 2005 to 2011. After experiencing a decrease in weekly wages from 2008 to 2009, the REDC region rebounded in 2010. This upward trend continued though 2011 with a 3% increase to \$813/weekly, an all-time high. Average weekly wages were up across each subregion of the REDC region, as well as for the State and Hillsborough and Rockingham Counties. Within the REDC region, the highest average wage rate was in the town of Merrimack at \$1,682/weekly. The lowest average was in the town of Hampton Falls, with an average wage of \$590/weekly. Once again, the employees in the REDC region on average made less than the state weekly average of \$909/weekly.

Unemployment Rates and Trends

Table C-4 in the Appendix includes town-by-town annual unemployment data from 2002 through 2012. Over this 10-year

period, rates were generally at the lowest from 2006 to 2007 and highest during 2009-2010. The state and country are coming off of the worst recession in over 70 years, and the unemployment rates are slow to recover. In 2012, overall annual unemployment rates have remained flat from 2011, with no to minimal increases across the region. The lowest unemployment rate was in the Eastern subregion (5.2%) and highest in the Central subregion (6.3%). Even

with the mild recovery in 2011 annual rates, overall rates are still 2 – 3% higher than those from 2000. Results are summarized in the table, below.

Although the unemployment rate increased slightly in the State of New Hampshire, it is still lower than both Hillsborough and Rockingham Counties. In addition, even though New Hampshire is the only State in the New

ANNUAL UNEMPLOYMENT RATES FOR THE REDC SUBREGIONS, COUNTIES, AND STATE

Town/Area	Annual 2002*	Annual 2003*	Annual 2004*	Annual 2005*	Annual 2006*	Annual 2007*	Annual 2008*	Annual 2009*	Annual 2010*	Annual 2011*	Annual 2012*
CEDS Eastern Towns	4.1%	4.1%	3.8%	3.6%	3.5%	3.4%	3.8%	5.8%	5.4%	4.8%	5.2%
CEDS Central Towns	5.4%	5.4%	4.6%	4.2%	3.9%	3.9%	4.5%	6.8%	6.5%	5.8%	6.3%
CEDS Western Towns	5.9%	5.6%	4.7%	4.2%	3.9%	3.9%	4.2%	6.7%	6.6%	5.9%	6.1%
REDC CEDS region	5.0%	4.9%	4.3%	3.9%	3.7%	3.7%	4.2%	6.4%	6.1%	5.5%	5.9%
Hillsborough County	4.9%	4.7%	4.0%	3.7%	3.7%	3.6%	3.9%	5.6%	6.3%	5.5%	5.7%
Rockingham County	5.5%	5.4%	4.7%	4.2%	3.9%	3.9%	4.3%	6.6%	6.3%	5.7%	6.0%
New Hampshire	4.5%	4.5%	3.9%	3.6%	3.5%	3.5%	3.9%	6.2%	6.1%	5.4%	5.5%

Source: NH Dept. of Employment Security - Economic & Labor Market Information Bureau

* Rates not seasonally adjusted.

England Region to see an increase in the annual unemployment rate in 2012, both the regional counties and the state rates are still significantly lower than that of the New England Region and United States. The table below demonstrates that New Hampshire is second only to Vermont with the lowest unemployment rate in the New England Region. New Hampshire's jobless rate continued to remain below the national average rate during 2012 and ranked 8th overall behind North Dakota (3.1%), Nebraska (3.9%), South Dakota (4.4%), Vermont (5.0%), Iowa and Oklahoma (5.2%) and Wyoming (5.4%) on the national level.

As reported in last year's CEDS update, unemployment rates in the REDC region remained fairly low and level from 2006 to 2008, with annual unemployment rates increasing sharply in 2009. After two years of modest decreases in the annual unemployment rates in the REDC region in 2010 and 2011, the rates increased slightly in 2012. As highlighted in the table, on the following page, the hardest hit NECTA in the REDC region remains the Salem, NH area. With a rate of 8.1% annual unemployment in 2012, the Salem, NH region matched the national annual unemployment rate. The U.S. Office of Management and Budget uses the term NECTA, New England City and Town Area, which is a geographic and statistical entity for use in describing aspects of the New England region of the United States. The Portsmouth NH-ME Metro NECTA, NH Portion (24) remained the strongest sub-area with an annual unemployment rate of only 4.8% for 2012.

While the REDC region and state unemployment levels are slightly up in 2012, the New England Region and national rates are improving. Although the national unemployment rate remains 3–4% higher than the

UNEMPLOYMENT RATES FOR NEW ENGLAND STATES AND COUNTRY

	Annual Unemployment Rate			Change 2011-2012
	2010	2011	2012	
Hillsborough County	6.3	5.5	5.7	0.2
Rockingham County	6.3	5.7	6.0	0.3
New Hampshire	6.1	5.4	5.5	0.1
Connecticut	9.1	8.8	8.4	-0.4
Maine	7.9	7.5	7.3	-0.2
Massachusetts	8.5	7.4	6.7	-0.7
Rhode Island	11.6	11.3	10.4	-0.9
Vermont	6.2	5.6	5.0	-0.6
New England	8.5	7.7	7.2	-0.5
United States	9.6	8.9	8.1	-0.8

Source: US Department of Labor-Bureau of Labor Statistics

Changes in the Region

AVERAGE ANNUAL UNEMPLOYMENT RATES FOR REDC CEDS REGION NECTAs

	2009	2010	2011	2012	Change from 2009-2012	Change from 2009-2010	Change from 2011-2012
Rochester-Dover NH-ME MetroNECTA (16)	6.2%	5.9%	5.3%	5.5%	-0.7%	-0.3%	0.2%
Manchester NH NECTA (19)	6.3%	6.2%	5.3%	5.5%	-0.8%	-0.1%	0.2%
Nashua NH-MA NECTA, NH Portion (22)	6.4%	6.3%	5.6%	5.7%	-0.7%	-0.1%	0.1%
Exeter Area, NH Portion, Haverhill-North Andover-Amesbury (23)	7.4%	6.9%	6.3%	6.7%	-0.7%	-0.5%	0.4%
Portsmouth NH-ME Metro NECTA, NH Portion (24)	5.4%	5.1%	4.7%	4.8%	-0.6%	-0.3%	0.1%
Pelham Town, Lowell-Billerica-Chelmsford MA-NH NECTA Division (26)	8.2%	7.8%	7.1%	7.3%	-0.9%	-0.4%	0.2%
Salem Town, NH Portion, Lawrence-Methuen-Salem MA-NH NECTA	8.0%	8.2%	7.3%	8.1%	0.1%	0.2%	0.8%
Hillsborough County	6.5%	6.3%	5.5%	5.7%	-0.8%	-0.2%	0.2%
Rockingham County	6.6%	6.3%	5.7%	6.0%	-0.6%	-0.3%	0.3%
New Hampshire	6.2%	6.1%	5.4%	5.5%	-0.7%	-0.1%	0.1%
New England	8.1%	8.5%	7.7%	7.2%	-0.9%	0.4%	-0.5%
United States	9.3%	9.6%	8.9%	8.1%	-1.2%	0.3%	-0.8%

Source: NH Economic & Labor Market Information Bureau

2013 MONTHLY UNEMPLOYMENT RATES FOR REGIONAL NECTAS

	Jan. 2013	Feb. 2013	March 2013	Change Jan-March 2013	Change March 2012-2013
Rochester-Dover NH-ME MetroNECTA, NH Portion (16)	6.3%	6.3%	5.9%	-0.4%	0.4%
Manchester NH NECTA (19)	6.3%	6.0%	5.8%	-0.5%	0.3%
Nashua NH-MA NECTA, NH Portion (22)	6.7%	6.4%	6.2%	-0.5%	0.5%
Exeter Area, NH Portion, Haverhill-North Andover-Amesbury, NH Portion (23)	8.0%	7.4%	6.6%	-1.4%	0.2%
Portsmouth NH-ME Metro NECTA, NH Portion (24)	5.8%	5.6%	5.5%	-0.3%	0.7%
Pelham Town, Lowell-Billerica-Chelmsford MA-NH NECTA Division, NH Portion (26)	9.5%	8.5%	7.1%	-2.4%	0.4%
Salem Town, NH Portion, Lawrence-Methuen-Salem MA-NH NECTA, NH Portion (27)	9.2%	8.5%	7.8%	-1.4%	0.2%
Hillsborough County	6.6%	6.3%	6.1%	-0.5%	0.5%
Rockingham County	7.1%	6.6%	6.3%	-0.8%	0.5%
New Hampshire	6.5%	6.2%	6.0%	-0.5%	0.4%
United States	8.5%	8.1%	7.6%	-0.9%	-0.8%

Source: NH Economic & Labor Market Information Bureau

rate of the mid-2000's, it is down 0.8% from 2011. As the entire country and this region works to recover from the recession and unemployment rates remain near or at all-time highs, New Hampshire continues to fare better than the New England Region and United States. However, the REDC CEDS region has continued to maintain unemployment rates higher than the state annual rate. The Portsmouth NH-ME Metro NECTA is the only region that had a rate lower than that of the State in 2012, while Manchester NH and Rochester-Dover NH-ME Metro NECTAs had the same annual rate as the state.

So far in 2013, the unemployment rates in the REDC region remain near

or above the annual rates from 2012; however, the rates are improving. The table on the previous page outlines the monthly (not seasonally adjusted) unemployment rates for the first three months of 2013. Rates within the REDC Region decreased on average 1% from January to March 2013. It is interesting to note that the region experienced a similar drop in rates during the first quarter of 2011 and 2012; however, rates across the board were approximately 0.5% greater in March 2013 than March 2012. This indicates that the region has slowed down in its recovery.

Recent Closings The State of New Hampshire Department of Resources & Economic Development (DRED) Office of Workforce Opportunity monitors significant plant and business closings during the year. The state's Rapid Response program works with qualifying

employers, and if a company chooses to participate, DRED receives a count of the number of layoffs. The table below summarizes reported closings and/or reductions in workforce in the REDC Region that occurred during 2012 and for partial year 2013 (report date of March, 2013). During 2012, the Region experienced a reported loss of 1,196 jobs, which were 87 fewer jobs than what was reported in 2011. The most notable job losses between January 2012 and March 2013 came from Lowe's with 277 jobs in three locations around the region, Chunky's Cinema, Pelham and Nashua (217 jobs), BAE Systems, Nashua (200 jobs), and NorAm, Hudson (199 jobs). The City of Nashua was hardest hit during that period with a reported work force reduction of roughly 400 jobs. The largest impacted industry was manufacturing, which reported approximately 600 jobs lost between January 2012 and March 2013.

REPORTED WORKFORCE REDUCTIONS FROM LAYOFFS AND PLANT CLOSINGS

Company Name	Location	Industry	Layoff Date	Other Layoff Dates	Total Employees	No. Employees Terminated	No. of Sites	Reported in 2012 CEDS?
Thermo Fisher	Portsmouth	manufacturing	11/11/11	01/03/12	200	150	2	yes
Friendly's	Keene, Exeter	hospitality	01/08/12		unknown	unknown	unknown	yes
Chunky's Cinema	Pelham/ Nashua	cinema/pub	01/08/12		217	217	2	yes
Cobham (DTC)	Nashua	communications	03/01/12		72	72	1	yes
Vectron International	Hudson	manufacturing	03/12/12	May 2012 Aug. 2012	150	90	1	yes
NorAm	Hudson	distribution	07/27/12		199	199	1	no
Exeter Health Care	Exeter	healthcare	08/17/12	09/30/12	118	118	1	no
GT Advanced Technologies	Merrimack	manufacturing	10/12/12		600	50	1	no
Hostess Brands	Several	distribution	11/21/12		90	90	5	no
Source HOV	Portsmouth	services	11/30/12		100	100	1	no
So. NH Medical	Nashua	healthcare	TBD		1800	100	1	yes
Sears	Keene/ Nashua	retail	TBD		unknown	unknown	2	yes
Benchmark Electronics	Nashua	manufacturing	TBD		unknown	10		yes
Airgas	Salem	utility	01/01/13	05/01/12	25	25	1	no
Brookstone	Merrimack	retail	01/14/13		305	71	1	no
BAE	Nashua	mfg defense	03/04/13		2000	200	1	no
Fisher Scientific	Hudson	biotech mfg	04/19/13		66	38	1	no
Findings, Inc.	Keene	manufacturing	06/13/13	rolling	50	50	1	no
Airgas East	Salem	distribution	multp.		173	56	1	no
Lowe's	3 locations	retail	ongoing		277	277	3	no
Amphenol Backplane	Nashua	manufacturing	TBD		unknown	13	1	no

Source: NH DRED Office of Workforce Opportunity

Labor Force Table C-6 in the Appendix tracks civilian labor force data in the County, State and in the other New England States, and it is summarized for 2011 and 2012, below. Over that 12-month period, Hillsborough County, Rockingham County and the State of New Hampshire all experienced an increase in unemployment rate. However, the New Hampshire region also saw an increase in its pool of available workers, with an increase of 0.48% (1,100 workers) in Hillsborough, 0.95% (1,657 workers) in Rockingham and 0.54% (4,000 workers) within the state. There is a rise in the number of both unemployed and employed individuals, indicating that the increase in unemployment may be

attributed to an increase in the available worker force and not a loss of jobs.

In all other New England States and the nation, unemployment rates and the number of unemployed workers are down from 2011. However, some of the states experienced an increase in their labor force, while others witnessed a decrease. For the nation, the unemployment rate decreased by 0.8% between 2011 and 2012, yet the labor force was up 0.88% (1,358,000 workers). This indicates that new jobs are being created.

CIVILIAN LABOR FORCE IN THE NEW ENGLAND REGION

Region/State	2011				2012				Change 2011- 2012			
(in thousands)	Civilian Labor Force	Employed	Un-employed	Unempl. Rate (%)	Civilian Labor Force	Employed	Un-employed	Unempl. Rate (%)	Civilian Labor Force	Employed	Un-employed	Unempl. Rate (%)
Hillsborough County	228.4	215.7	12.7	5.5	229.5	216.4	13.0	5.7	1.100	0.729	0.371	0.2
Rockingham County	174.9	165.0	9.9	5.7	176.6	166.0	10.6	6.0	1.657	0.953	0.704	0.3
New Hampshire	738.0	698.0	40.0	5.4	742.0	701.0	41.0	5.5	4.000	3.000	1.000	0.1
Connecticut	1,902.0	1,749.0	169.0	8.8	1,879.0	1,722.0	157.0	8.4	-23.000	-27.000	-12.000	-0.4
Maine	704.0	651.0	53.0	7.5	706.0	655.0	52.0	7.3	2.000	4.000	-1.000	-0.2
Massachusetts	3,470.0	3,202.0	254.0	7.4	3,475.0	3,242.0	234.0	6.7	5.000	40.000	-20.000	-0.7
Rhode Island	563.0	500.0	63.0	11.3	560.0	502.0	58.0	10.4	-3.000	2.000	-5.000	-0.9
Vermont	359.0	339.0	20.0	5.6	356.0	339.0	18.0	5.0	-3.000	0.000	-2.000	-0.6
New England	7,735.0	7,140.0	599.0	7.7	7,720.0	7,161.0	560.0	7.2	-15.000	21.000	-39.000	-0.5
United States	153,617	139,869	13,747	8.9	154,975	142,469	12,506	8.1	1,358	2,600	-1,241	-0.8

Source: US Bureau of Labor Statistics

Household Income The ACS collects numerous data regarding income and poverty, and categorizes it by factors such as ethnicity, gender, age, family type, etc. For the purposes of the 2013 CEDS Update, we narrowed down the scope of data to look solely at the median annual household income. The ACS uses the following definitions:

Household: A household includes all the people who occupy a housing unit as their usual place of residence.

Income: "Total income" is the sum of the amounts reported separately for wages, salary, commissions, bonuses, or tips; self-employment income from own non-farm or farm businesses, including proprietorships and partnerships; interest, dividends, net rental income, royalty income, or income from estates and trusts; Social Security or Railroad Retirement income; Supplemental

ANNUAL HOUSEHOLD INCOME

	Median Household Income			2011	
	2010	2011	Change	Income Compared to US Average	% Above US Average
CEDS Eastern Towns	\$70,529	\$73,949	\$3,420	\$21,187	40%
CEDS Central Towns	\$81,077	\$81,875	\$798	\$29,113	55%
CEDS Western Towns	\$76,861	\$78,475	\$1,613	\$25,713	49%
REDC Region	\$76,146	\$78,054	\$1,907	\$25,292	48%
Hillsborough County	\$69,321	\$70,591	\$1,270	\$17,829	34%
Rockingham County	\$75,825	\$77,470	\$1,645	\$24,708	47%
New Hampshire	\$63,277	\$64,664	\$1,387	\$11,902	23%
United States	\$51,914	\$52,762	\$848	\$-	-

Source: American Community Survey, US Census Bureau

Security Income (SSI); any public assistance or welfare payments from the state or local welfare office; retirement, survivor, or disability pensions; and any other sources of income received regularly such as Veterans' (VA) payments, unemployment compensation, child support, or alimony.

Median income: The median income divides the income distribution into two equal groups, one having incomes above the median, and other having incomes below the median.

Table F-1 in the Appendix lists the median household income for a twelve-month period, adjusted to 2011 dollars for the municipalities within the CEDS region, as well as Hillsborough and Rockingham Counties, New Hampshire and the United States. A summary of the average annual household incomes for the REDC region is listed above.

The median annual household income for the REDC Region, generated from the ACS 5-year data from 2007-2011 and adjusted to 2011 dollars is \$78,475, which is \$1,613 greater than 2010. On average, the entire REDC region, the two-county area in our region, the State of New Hampshire and the United States all experienced an increase in the average household income from 2010 to 2011.

The REDC region's annual median household income for 2011 is 48% greater than the United States average of \$52,762 annual income. Although not as a significant difference, the New Hampshire state average of \$64,664 annual income is still 23% greater than that of the nation. When comparing 2010 data to 2011, we see that the

distribution of wealth remains fairly consistent, with the largest percentage of REDC region households earning between \$50,000 and \$74,999 annually. Approximately two-thirds of the nation earns on average less than \$74,999 annually, with 18% of the households earning less than \$20,000 annually. The REDC however, has a more even distribution of wealth with approximately 50% of its households earning less than \$74,999 annually and 50% earning greater than \$75,000 annually.

Looking at only the REDC Region, the income distribution is a little more uniform. The average annual household income is greatest in the Central subregion (\$81,875), followed by the Western subregion (\$78,475) and then the Eastern subregion (\$73,949). Conversely, the Eastern subregion experienced the greatest increase in annual household income between 2010 and 2011, followed by the Western then Central subregions. Although the Eastern subregion has the lowest average annual income, it has a larger percentage of its population bringing in over \$200,000 annually (8% for Eastern versus 5% for Central and 6% for Western).

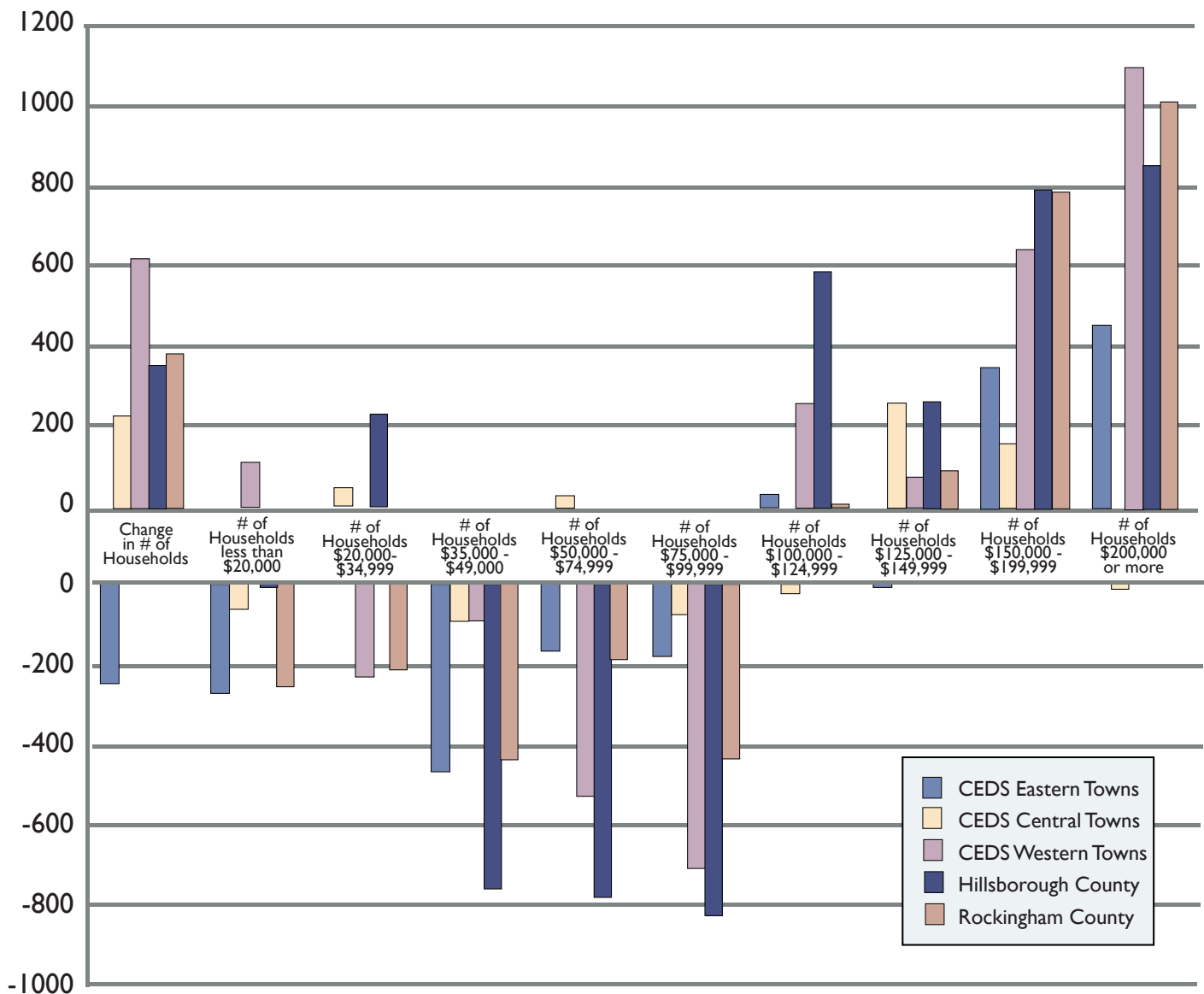
As outlined in the 2012 CEDS update, one explanation for why the Central subregion annual income is greater than the other two subregions is age distribution. The Central region has a higher percentage of its population (when compared with the other subregions) within the 40-54 year old age bracket – the age when most individuals are earning their personal maximum wage. Conversely, the Western subregion has a higher percentage of its population (when compared with the other subregions) falling at 24 years old and younger. These individuals are generally just entering

Changes in the Region

the workforce and therefore will have smaller wages as a group. Finally, the Eastern subregion has a larger percentage of its population (when compared with the other subregions) at 60 years and older. This is the age when many individuals retire and/or move to a fixed income, therefore, the median income will tend to be lower.

The chart below illustrates the changes in annual household income from 2010 to 2011 within the different income brackets. What the chart tells us is that between 2010 and 2011, the number of households making less than \$100,000 annually is down; however, the number of households making greater than \$100,000 increased across the board, with the largest number of increases at over \$200,000 annually.

2010 to 2011 Change in Number of Households Within an Annual Household Income Bracket



Data Source: American Community Survey, US Census Bureau

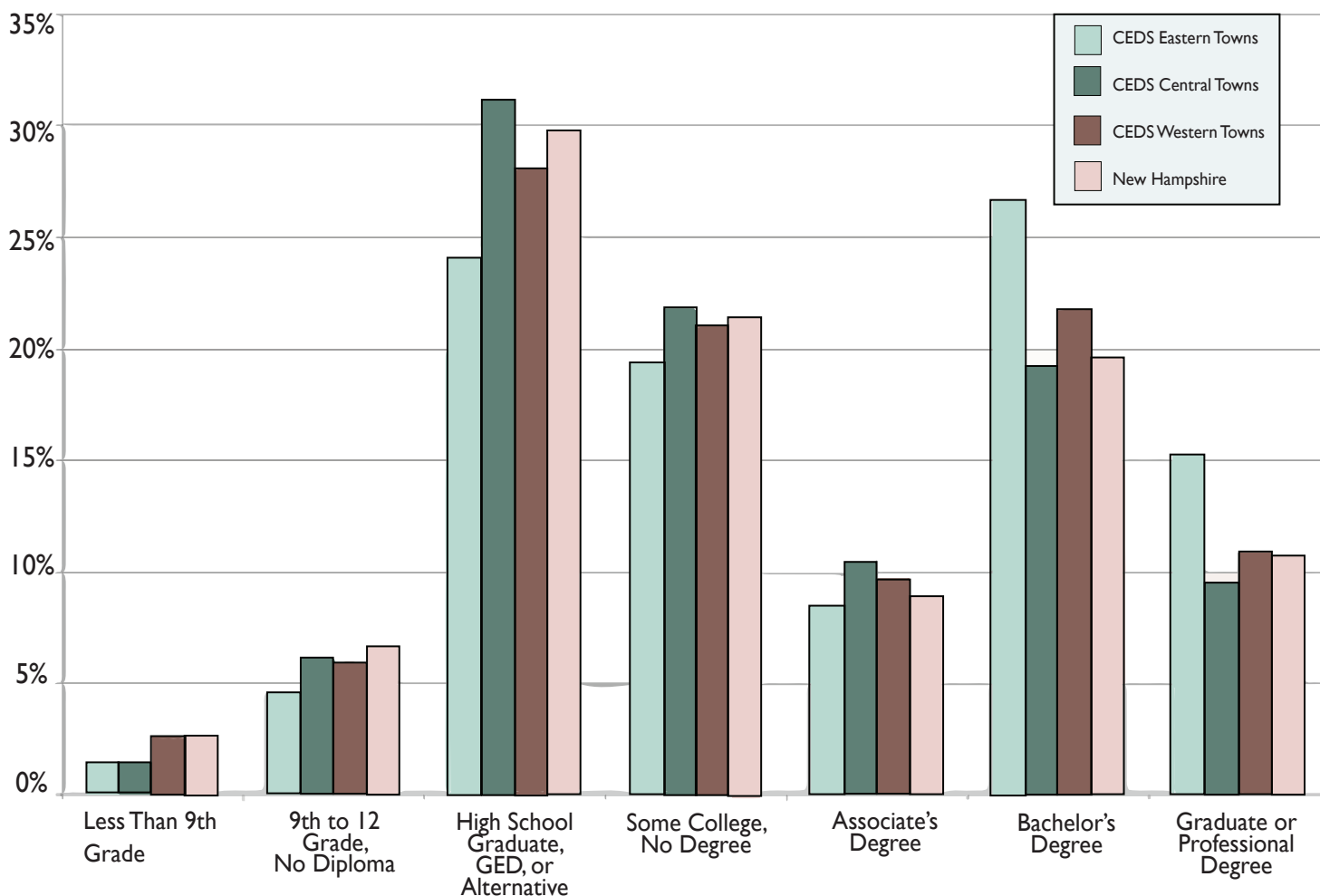
Education Attainment Similar to the Annual Household Income data, the ACS data collected for Education Attainment is categorized by factors such as ethnicity, gender, and age. For the purposes of the 2013 CEDS Update, we narrowed down the scope of data to look at the distribution of education attainment broken out by gender. The data is located in Table F-2 in the Appendix and summarized in the chart, below.

As was found with the 2010 data, in 2011, with the exception of the Eastern subregion, the highest percentage of each region's population had a maximum level of education attainment with a high school diploma, or equivalent. In the Eastern subregion, the highest percent of its population has earned a bachelor's degree. On average,

roughly 29% of the population earned a high school diploma or equivalent as the maximum level of education attainment, with the Eastern subregion an outlier at 24% of its population. Within the Eastern subregion, 42% of its population earned a Bachelor's or Graduate/Professional degree.

When comparing the 2010 to 2011 ACS data, there is relatively little change in the distribution of levels of education attainment levels. After accounting for moderate increases in population, the greatest percentage increases in the maximum level of education attainment were found in the "some college, no degree" and "graduate or professional degree" categories. The largest percent decrease in the maximum level of education attainment was found in the "9th to 12th grade, no diploma" division.

Level of Education Attainment by Percentage of Population



Data Source: American Community Survey, US Census Bureau

State of the Economy

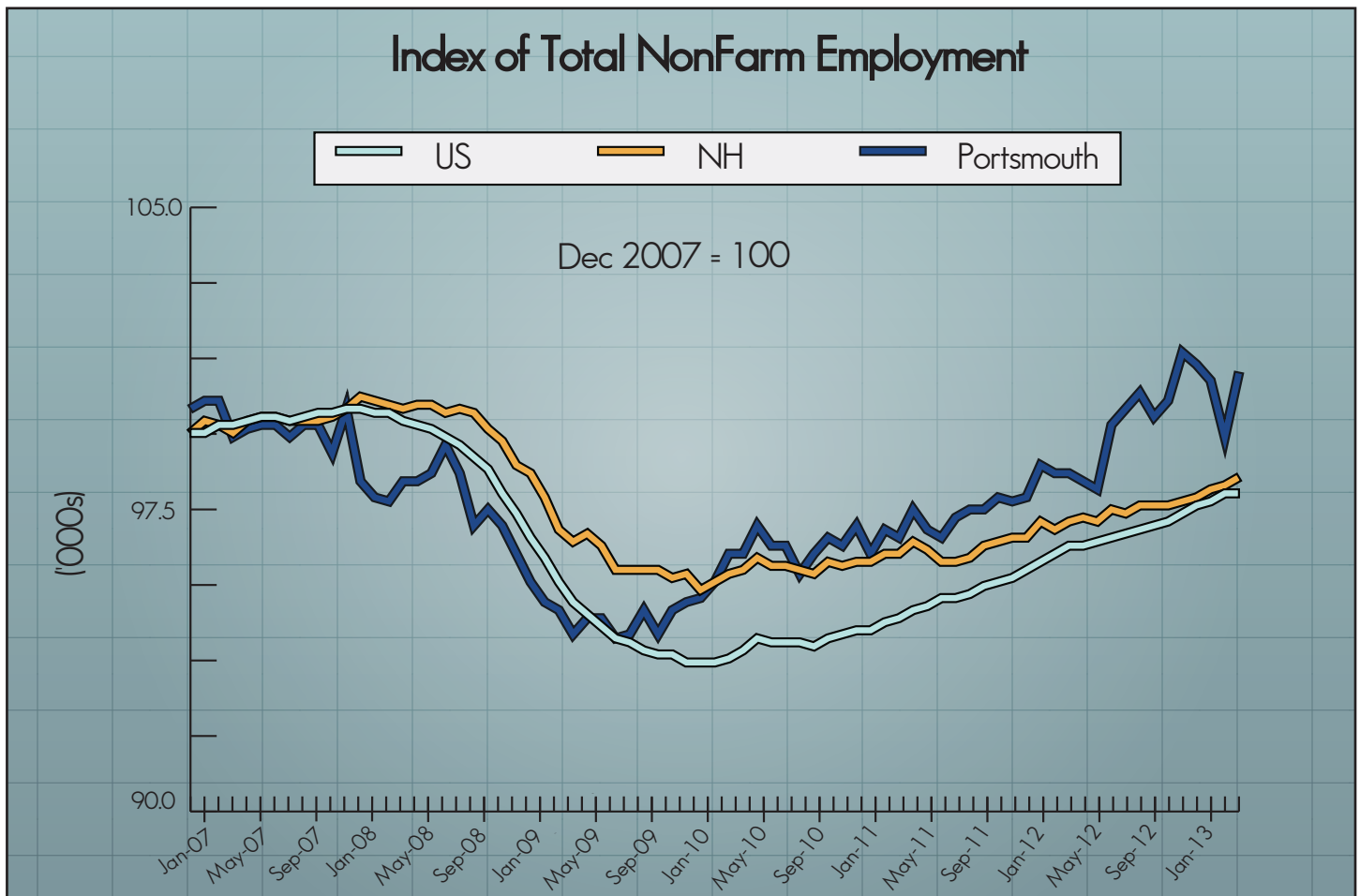
The State of the Economy in Rockingham County continues to improve. The County and the rest of New Hampshire have been emerging from the Great Recession, but the pace of the recovery is much slower than in the typical post World War II recession. The most positive statement that can be made is that the New Hampshire economy has fared better than the nation as a whole.

The following chart shows employment for the United States, New Hampshire and the Portsmouth, NH area, indexed to the beginning month of the Great Recession (December 2007). The chart shows the number of jobs declined more severely in the United States, than in either New Hampshire or in the Greater Portsmouth area (although Portsmouth was following the nation more closely than New Hampshire at the beginning of the recession). However, even though the recovery began in the summer of 2010, the rate of employment growth since that time has been lackluster.

While neither the nation nor New Hampshire have yet achieved its pre-recession level of employment, the job base in the Greater Portsmouth area is actually somewhat larger than it was before the beginning of the recession.

The National Economic Forecast According to the March 2013 United States economic forecast from Mark Zandi of Moody's Analytics the U.S. economy is holding up well despite mounting fiscal headwinds, at least so far. Real GDP growth in the first quarter is tracking close to 2%, about average since the recovery began nearly four years ago. Consumers seem unfazed by the tax increases that took effect this year, and although the government's spending cuts hurt, they have yet to significantly undermine growth.

The Federal Reserve's pursuit of monetary easing means that interest rates are at historically low levels. They are likely



Data Source: US Bureau of Labor Statistics

to remain there, at least until the national unemployment rate hits 6.5%, which is not likely until late 2014. It may be the summer of 2016 before the Fed is able to normalize monetary policy.

On the fiscal policy side, the sequester took effect March 1; it will reduce Federal outlays in 2013 by \$58 billion and by \$1.2 trillion over the next decade. Even if the sequester is reduced by half, it will subtract more than 1% from economic growth in 2013. However, the sequester has also begun to get the Federal deficit under control.

A strengthening private sector is helping the U.S. economy withstand the drag from fiscal policy. Consumers seem unfazed by the tax increases at the beginning of 2013, and Federal government cut backs have so far not undermined growth.

In summary Mark Zandi notes: "The economy has performed below expectations over the past two years. Scarred by the Great Recession, businesses and households have taken longer than anticipated to get their grooves back. Their caution has been reinforced by unfortunate events such as the European debt crisis and Washington's political brinkmanship. But the nightmare of the recession is fading, and though many dangers remain, the threats appear less threatening. Optimism about the economy is even more warranted."

Impact upon New Hampshire New Hampshire's recovery has been lackluster when compared to the New England job recovery. While the assessment of New Hampshire's current employment picture improved with this year's revisions to the current jobs data, the weak performance of the state economy is still a serious concern.

New Hampshire still ranks well among the states in measures of education attainment, quality of life and personal tax burden. Yet that advantage is withering away, and may erode further in years to come.

The 2012 Kids Count report from the Annie E. Casey Foundation ranked New Hampshire as the most child-friendly state in the country for the ninth time in ten years. The annual state ranking report looks at education, health, family and community support indicators in deriving its assessment of child wellbeing.

In another report, the Manchester-Nashua area ranked second best among cities to raise a family. The report from Kiplinger's Personal Finance developed its analysis based on comparing the cost of living, income growth, crime rate, health care, public schools, community services, and cultural resources among 360 metropolitan areas across the U.S. The study also relied on interviews with local realtors, educators and public officials.

A July 2012 poll published by the Business and Industry Association showed that about half of New Hampshire businesses surveyed expect improved economic conditions in 2013. Issues that are of major concern to businesses range from the Supreme Court upholding the Affordable Care Act to the "Fiscal Cliff".

Dennis Delay, New Hampshire Forecast Manager for New England Economic Partnership (NEEP) noted in November 2012 that the New Hampshire economic recovery is still slow by historical standards. The NEEP forecast summary is shown below.

Granite State manufacturing jobs declined at a 3.2% annual rate in the last five years (2006 to 2011). In the forecast

NEEP FORECAST SUMMARY COMPARISONS AVERAGE ANNUAL RATES OF GROWTH DECEMBER 2012 FORECAST

	Actual 2001-2006	Actual 2006-2011	Forecast 2011-2016
Gross State Product (Real Dollars)	%	%	%
GPS - New Hampshire	2.3	0.8	3.6
GPS - New England	1.6	0.5	3.1
GDP - United States	2.7	0.5	3.1
Total Non-Farm Jobs	%	%	%
Jobs - New Hampshire	0.5	-0.5	1.5
Jobs - New England	-0.1	-0.5	1.3
Jobs - United States	0.6	-0.7	2.0

Source: New England Economic Partnership

period, New Hampshire manufacturing jobs will decline only slightly, at a 0.2% average decrease each year. However, it is expected that Granite State manufacturing output will continue to increase much faster in the forecast period than the increase in jobs, as was also the case in the past five years.

Private service producing jobs grew at an annual rate of only 0.1% over the last five years (2006 to 2011). The rate of growth will increase to 1.7% annually in the forecast period. The fastest rate of growth (2.7%) will occur in leisure and hospitality, followed by 2.5% annual growth in professional and business services jobs. Education and health service jobs grew by 2.3% annually over the last five years, but the rate of growth will slow to 1.7% average annual growth in education and health services jobs from 2011 to 2016.

Housing permit data indicates that building activity in New Hampshire and New England has reached its lowest level in decades. Construction employment in New Hampshire declined at an annual rate of 5.7% in the last five years, compared to the New England average 5.4% annual decline. Growth in New Hampshire construction jobs will be moderate in the five years of the forecast period (1.8% annual growth), as housing permits increase from the current annual rate of 2,200 per year to a more normal 6,000 per year.

The November 2012 New England Economic Partnership forecast took special note of a recent study by the New Hampshire Center for Public Policy Studies, which revealed that many of the sources of New Hampshire's past growth may not continue into the future.

For several decades, New Hampshire has been the Northeast's economic stand-out. With a highly-educated workforce, high rates of in-migration and high income levels, New Hampshire boasted a dynamic economy that gave it distinct advantages over its neighbors.

The Great Recession disrupted much of the New Hampshire economy, as it has across the country. But it is a mistake to assume that the recession is the sole reason for the recent slowdown in the state's economic engine, or that, once the impacts of the recession are behind us, New Hampshire will return to the pattern of reliable growth of years past. After benefiting from nearly three decades of economic tailwinds, New Hampshire now faces a strong headwind.

What does that headwind look like? First, more people are now leaving New Hampshire than are moving here. The recession saw a sustained period of out-migration from

the state, but migration into the state was already declining well before the recession. That decline in new arrivals has been accompanied by another worrisome demographic trend: New Hampshire's population is growing older and at a faster rate than the rest of the country. While the state's median age was equal to the U.S. average in 1980, New Hampshire's median age rose to 41 by 2010, compared to the national average of 37.

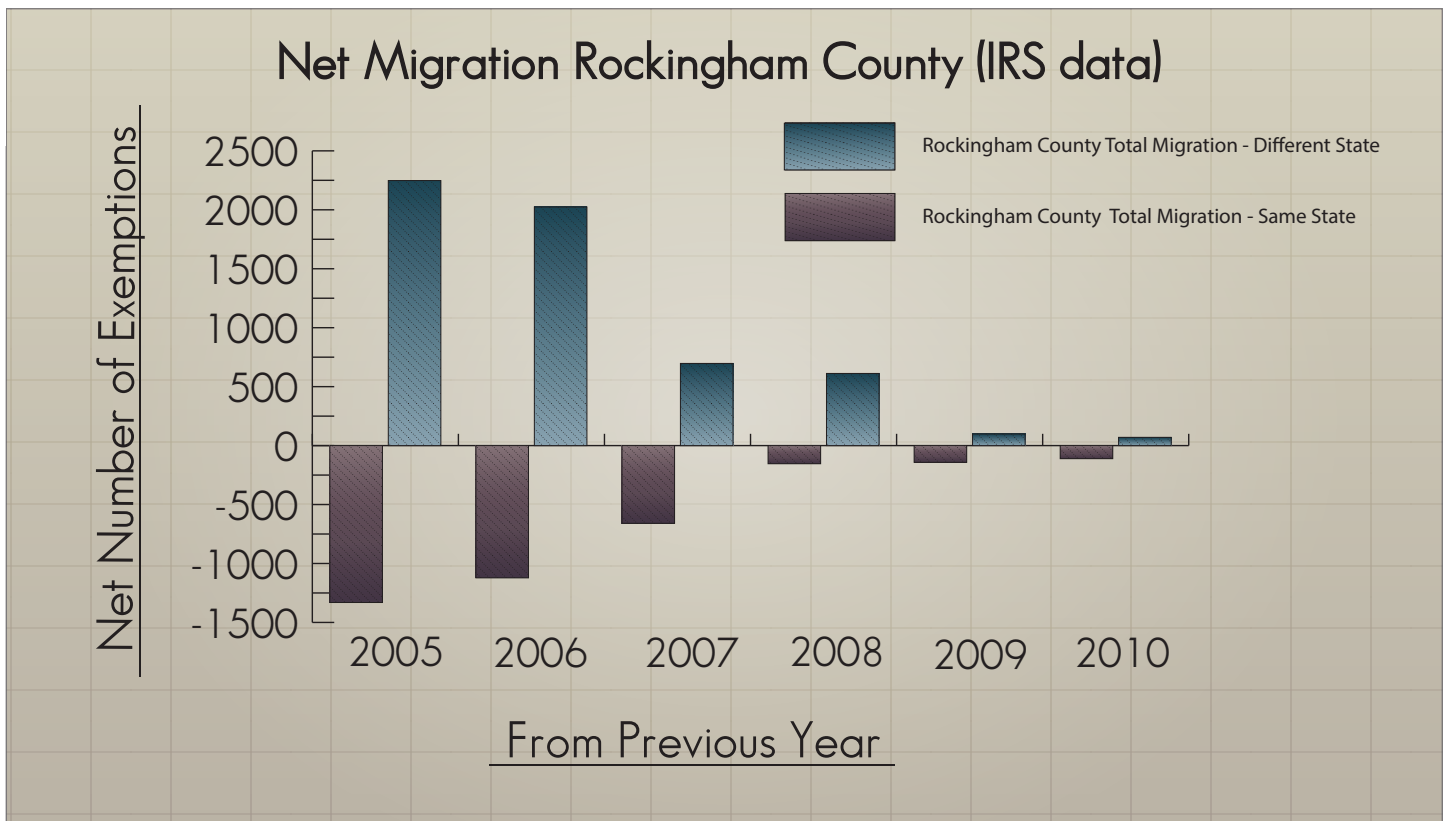
Second, as the state's population has aged, the number of New Hampshire residents participating in the workforce has declined. This trend was underway before the recent downturn in the economy, so it is not due solely to the recession. Without increases in capital investment and technology to offset this drop in the labor force, we'll likely see further declines in economic output.

Third, New Hampshire is also seeing a decline in its educational edge over other states. Many of the people who moved here over the past three decades were highly educated, allowing the state to race ahead of the rest of the country in the percent of residents with a college degree. This translated to greater worker productivity and higher incomes. But over the past decade, New Hampshire's rate of increase in educational attainment slipped below the national rate. In other words, we're adding college graduates to our workforce at a slower pace than the rest of the country – a marked departure from the previous decades.

Taken together, these trends have significantly slowed growth in the state economy. Between 2000 and 2010, New Hampshire saw a slower rate of growth in Gross Domestic Product than in any period over the past 40 years. Even as the recession slowed economic growth across the country, many areas outperformed New Hampshire with more buoyant job growth, higher productivity gains, and higher growth in capital stock. New Hampshire also saw a greater drop in GDP growth between the 1990s and the 2000s than almost every region of the country.

Viewed this way, New Hampshire's present economic advantages appear largely to be fueled by decades-old demographic trends that have run their course. Why does this matter? Many of the factors that contribute to the so-called "New Hampshire Advantage" – including a low crime rate, lower tax burdens, and high rates of job creation – are driven by the state's economic dynamism. A sustained decline in New Hampshire's record of economic growth will likely change all that.

The outcomes of these shifts may not necessarily all be negative. Slower population growth will likely mean less



Source: US Internal Revenue Service, County Migration Estimates

congestion and less strain on local government budgets, for instance. And some of the fundamental advantages upon which New Hampshire's economy is founded – proximity to Boston and a beautiful natural environment, for example – won't disappear anytime soon. But, at the least, this shift demands a recalibration of the assumptions upon which much state and local policy is founded.

There is no single, simple answer to these challenges. Any response must be a blend of approaches, with the goals of increasing the size and skill level of the workforce, boosting labor productivity, and encouraging capital investment. The question facing the new governor, Legislature and other state policymakers is how to prioritize the options in redesigning New Hampshire's economic blueprint.

The slowdown in migration into and out of Rockingham County can be seen in the chart above. Data on county migration levels, derived from Internal Revenue Service tax filing record, shows a significant slowdown in people moving into Rockingham County from other states (outside of New Hampshire). Interestingly the net outmigration of Rockingham County residents to other counties within New Hampshire also slowed in the same time period.

Rockingham County Cluster Analysis

An industry cluster analysis identifies industries that are geographically concentrated or of a similar nature, and that make use of related buyers, suppliers, infrastructure and workforce. Unlike an industry sector, a true industry cluster looks beyond the production of a good or service to the entire value chain. Clusters are industries that are connected by the flow of goods and services, which is stronger than the flow linking them to the rest of the economy. Industry clusters may initially develop informally, but clusters grow because member industries perceive or receive some type of benefit from the cluster.

The REDC region contains all of the cities and towns in Rockingham County, plus the Hillsborough County towns of Hudson, Litchfield, Merrimack, Pelham and the City of Nashua. In the following industry cluster analysis, because of data limitations, we look at only the Rockingham County region, and do not include the five municipalities in Hillsborough County.

QUARTERLY CENSUS OF EMPLOYMENT & WAGES (QCEW) CLUSTER - EMPLOYMENT

Description	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Total All Industries	130,917	130,262	130,312	133,808	136,150	138,103	138,380	137,160	131,372	131,904
Advanced Materials	9,768	7,650	6,790	6,827	6,527	6,530	6,686	7,083	5,997	6,153
Agribusiness, Food Processing & Technology	1,182	1,259	1,298	1,462	1,503	1,607	1,654	1,741	1,621	1,595
Apparel & Textiles	862	900	992	989	1,019	1,045	939	865	732	698
Arts, Entertainment, Rec. & Visitor Industries	4,763	5,098	5,099	5,173	5,018	5,115	5,052	5,060	4,965	5,111
Biomedical/Biotechnical (Life Sciences)	9,609	9,921	9,986	10,279	10,812	11,312	11,517	11,381	11,957	12,139
Business & Financial Services	10,783	10,525	10,602	11,039	11,275	11,893	11,792	11,038	10,963	10,928
Chemicals & Chemical Based Products	3,232	3,293	3,172	3,134	3,219	3,439	3,394	3,602	2,958	2,911
Defense & Security	4,246	4,174	4,085	4,065	4,459	4,495	4,617	4,557	4,558	4,465
Education & Knowledge Creation	1,230	1,308	1,565	1,480	1,643	1,394	1,462	1,426	1,503	1,846
Energy (Fossil & Renewable)	6,306	6,096	5,912	5,806	5,731	5,950	6,098	6,165	6,160	5,711
Forest & Wood Products	1,262	1,337	1,462	1,507	1,435	1,462	1,358	1,246	1,037	939
Glass & Ceramics	861	849	768	743	737	792	770	721	618	612
IT & Telecommunications	10,398	8,599	7,009	7,351	7,427	7,042	8,074	8,381	7,570	7,554
Transportation & Logistics	4,066	3,810	3,653	3,436	3,437	3,404	3,424	3,095	2,975	2,968
Manufacturing Supercluster	10,273	8,091	6,854	7,177	6,882	6,939	7,934	8,116	7,210	6,915
Primary Metal Mfg	191	217	206	202	323	404	492	529	415	338
Fabricated Metal Product Mfg	2,335	1,881	1,764	1,703	1,735	1,768	1,779	1,882	1,595	1,662
Machinery Mfg	990	962	1,026	1,316	1,402	1,668	1,917	1,859	1,790	1,640
Computer & Electronic Product Mfg	4,721	3,753	2,944	3,097	2,788	2,388	2,779	2,759	2,473	2,539
Electrical Equ., Appliance & Component Mfg	1,560	843	606	614	610	686	919	1,038	887	665
Transportation Equipment Mfg	476	435	308	245	24	25	48	49	50	71
Mining	92	98	103	126	123	130	210	174	114	148
Printing & Publishing	1,985	2,011	2,106	1,796	1,859	1,971	1,921	1,841	1,687	1,490

Source: US Commerce Department's Economic Development Administration, Innovation in American Regions

The above table identifies the major industry clusters in Rockingham County, New Hampshire, according to the "Innovation in America's Regions" tool developed by U.S. Economic Development Administration. The table shows employment (number of jobs) in each industry cluster for the ten years 2001 through 2010.

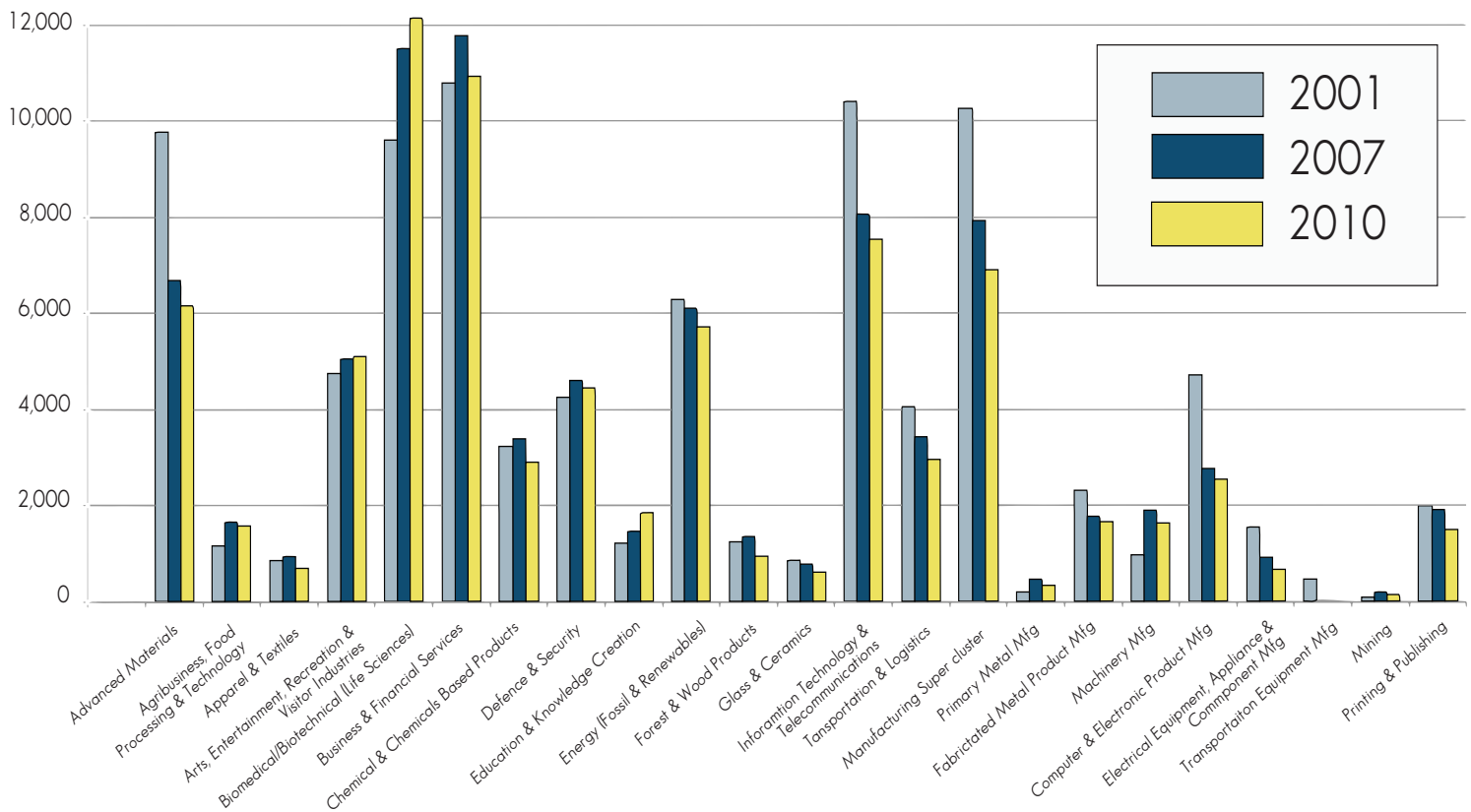
The industry cluster tool focuses on 17 clusters across the United States in order to provide a framework that is easy to analyze and understand. This tool is used in

identifying the basic competitive strengths in their regional economy.

The graph on the opposing page shows the growth in employment in each Rockingham County industry cluster.

The change in employment in the Rockingham County industry clusters is most appropriately examined in two time periods. The years 2001 to 2007 were prior to the Great Recession and a period of business expansion.

QCEW CLUSTER - EMPLOYMENT CHANGE



Data Source: US Commerce Department's Economic Development Administration, Innovation in American Regions

The years 2007 to 2010 include the Great Recession, and were noted by substantial business contraction.

Several industrial clusters in the Rockingham County region added jobs in the period 2001 to 2007. Primary metal manufacturing and Machinery manufacturing employment grew by 17% and 12% annually from 2001 to 2007. Agribusiness jobs grew by 5.8% annually, and employment in the Biomedical/Biotechnical cluster grew by 3.1% annually.

In the years 2007 to 2010, most industry clusters shrank due to a fall in demand associated with the Great Recession. Primary metal manufacturing jobs fell by 11.8% annually, for example. However some industry clusters did grow – the Education and Knowledge Creation cluster employment expanded by more than 8% annually, while Biomedical/Biotechnical cluster jobs grew by 1.8% annually.

QCEW -2010

Description	QCEW Cluster - Establishments	Industry Cluster Establishment LQ	QCEW Cluster - Employment	Industry Cluster Employment LQ	QCEW Cluster - Wages	Industry Cluster Annual Wages LQ
Total All Industries	10,542	1.00	131,904	1.00	\$5,912,430,236	1.00
Advanced Materials	273	1.63	6,153	1.27	\$402,585,883	1.24
Agribusiness, Food Processing & Technology	65	0.40	1,595	0.51	\$77,000,395	0.68
Apparel & Textiles	74	0.81	698	0.71	\$36,351,664	0.89
Arts, Entertainment, Recreation & Visitor Industries	351	1.14	5,111	0.98	\$125,705,403	0.72
Biomedical/Biotechnical (Life Sciences)	308	0.82	12,139	0.84	\$588,259,410	0.89
Business & Financial Services	1,680	1.01	10,928	0.94	\$798,191,343	0.87
Chemicals & Chemical Based Products	82	1.03	2,911	1.42	\$173,957,046	1.40
Defense & Security	443	1.15	4,465	0.62	\$295,574,331	0.62
Education & Knowledge Creation	173	1.20	1,846	0.36	\$75,992,416	0.33
Energy (Fossil & Renewable)	534	1.14	5,711	0.98	\$404,771,389	0.99
Forest & Wood Products	76	0.94	939	0.66	\$42,703,826	0.69
Glass & Ceramics	17	1.37	612	2.32	\$27,927,762	2.33
Information Technology & Telecommunications	568	1.42	7,554	1.49	\$610,095,221	1.39
Transportation & Logistics	233	0.93	2,968	0.76	\$138,631,924	0.78
Manufacturing Supercluster	239	1.52	6,915	1.24	\$497,628,920	1.42
Primary Metal Mfg	6	0.88	338	0.91	\$16,572,049	0.79
Fabricated Metal Product Mfg	105	1.54	1,662	1.30	\$92,265,371	1.55
Machinery Mfg	31	0.90	1,640	1.60	\$149,479,908	2.52
Computer & Electronic Product Mfg	72	3.27	2,539	2.24	\$194,794,829	1.93
Electrical Equipment, Appliance & Component Mfg	16	1.86	665	1.81	\$40,122,220	2.11
Transportation Equipment Mfg	9	0.53	71	0.05	\$4,394,543	0.05
Mining	21	1.51	148	0.80	\$7,736,198	0.71
Printing & Publishing	220	0.99	1,490	0.69	\$82,317,527	0.66

Source: US Commerce Department's Economic Development Administration, Innovation in American Regions

The above table shows data for these clusters for just the year 2010. The table includes numbers of establishments, employment, and total wages for each identified cluster for the year 2010, along with its LQ value.

The key statistic in the above table is the LQ, or Location Quotient. A Location Quotient analysis is used to assess industry concentration by comparing the employment shares of each industry in a particular region to the employment shares of the same industry based on a larger reference

region such as the nation. This method of comparing levels of employment between two geographic areas assumes that a region is self sufficient if its ratio of employment is proportional to the nation's ratio of employment for that industry. If the region's ratio of employment is lower than the nation's rate, the region is said to be producing less of that product and is therefore forced to import some of these products. If a region's ratio of employment is greater than the nation's rate, then the region is exporting some of its products.

In the table the following clusters have LQ values greater than one, and therefore are judged to be highly concentrated and of great importance to the Rockingham County, New Hampshire region.

- Advanced Materials
- Chemicals & Chemical Based Products
- Glass & Ceramics
- Information Technology & Telecommunications
- Fabricated Metal Product Mfg
- Machinery Mfg
- Computer & Electronic Product Mfg
- Electrical Equipment, Appliance & Component Mfg

The following table shows the LQs for each industry for the ten years 2001 to 2010. Note that the above industry clusters have retained their importance to Rockingham County over this time period.

INDUSTRY CLUSTER EMPLOYMENT LQ

Description	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Total All Industries	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Advanced Materials	1.58	1.33	1.23	1.23	1.17	1.17	1.22	1.32	1.24	1.27
Agribusiness, Food Processing & Technology	0.37	0.39	0.41	0.46	0.47	0.51	0.52	0.55	0.52	0.51
Apparel & Textiles	0.51	0.58	0.69	0.70	0.75	0.80	0.76	0.74	0.72	0.71
Arts, Entertainment, Recreation & Visitor Industries	0.92	0.99	0.99	0.97	0.94	0.95	0.93	0.93	0.95	0.98
Biomedical/Biotechnical (Life Sciences)	0.80	0.80	0.79	0.79	0.81	0.84	0.84	0.81	0.84	0.84
Business & Financial Services	0.98	0.97	0.97	0.98	0.98	1.00	0.97	0.91	0.94	0.94
Chemicals & Chemical Based Products	1.21	1.28	1.27	1.25	1.29	1.39	1.42	1.56	1.42	1.42
Defense & Security	0.64	0.64	0.63	0.61	0.65	0.64	0.65	0.63	0.64	0.62
Education & Knowledge Creation	0.28	0.29	0.34	0.32	0.35	0.29	0.30	0.29	0.30	0.36
Energy (Fossil & Renewable)	1.05	1.06	1.05	1.01	0.97	0.97	1.01	1.00	1.05	0.98
Forest & Wood Products	0.58	0.64	0.72	0.74	0.70	0.73	0.72	0.72	0.70	0.66
Glass & Ceramics	2.17	2.32	2.22	2.14	2.16	2.35	2.34	2.29	2.31	2.32
Information Technology & Telecommunications	1.63	1.51	1.31	1.38	1.39	1.30	1.53	1.57	1.49	1.49
Transportation & Logistics	1.00	0.97	0.93	0.85	0.83	0.81	0.80	0.74	0.76	0.76
Manufacturing Supercluster	1.30	1.13	1.01	1.05	1.00	1.01	1.18	1.24	1.28	1.24
Primary Metal Mfg	0.33	0.42	0.43	0.42	0.67	0.85	1.06	1.17	1.12	0.91
Fabricated Metal Product Mfg	1.42	1.23	1.20	1.14	1.14	1.14	1.15	1.24	1.24	1.30
Machinery Mfg	0.72	0.78	0.88	1.12	1.17	1.37	1.58	1.55	1.72	1.60
Computer & Electronic Product Mfg	2.67	2.47	2.13	2.27	2.06	1.77	2.14	2.18	2.14	2.24
Electrical Equipment, Appliance & Component Mfg	2.80	1.68	1.30	1.34	1.36	1.54	2.10	2.42	2.34	1.81
Transportation Equipment Mfg	0.24	0.23	0.17	0.13	0.01	0.01	0.03	0.03	0.04	0.05
Mining	0.47	0.53	0.56	0.66	0.62	0.63	0.98	0.82	0.61	0.80
Printing & Publishing	0.74	0.80	0.86	0.73	0.75	0.79	0.76	0.75	0.76	0.69

Source: US Commerce Department's Economic Development Administration, Innovation in American Regions

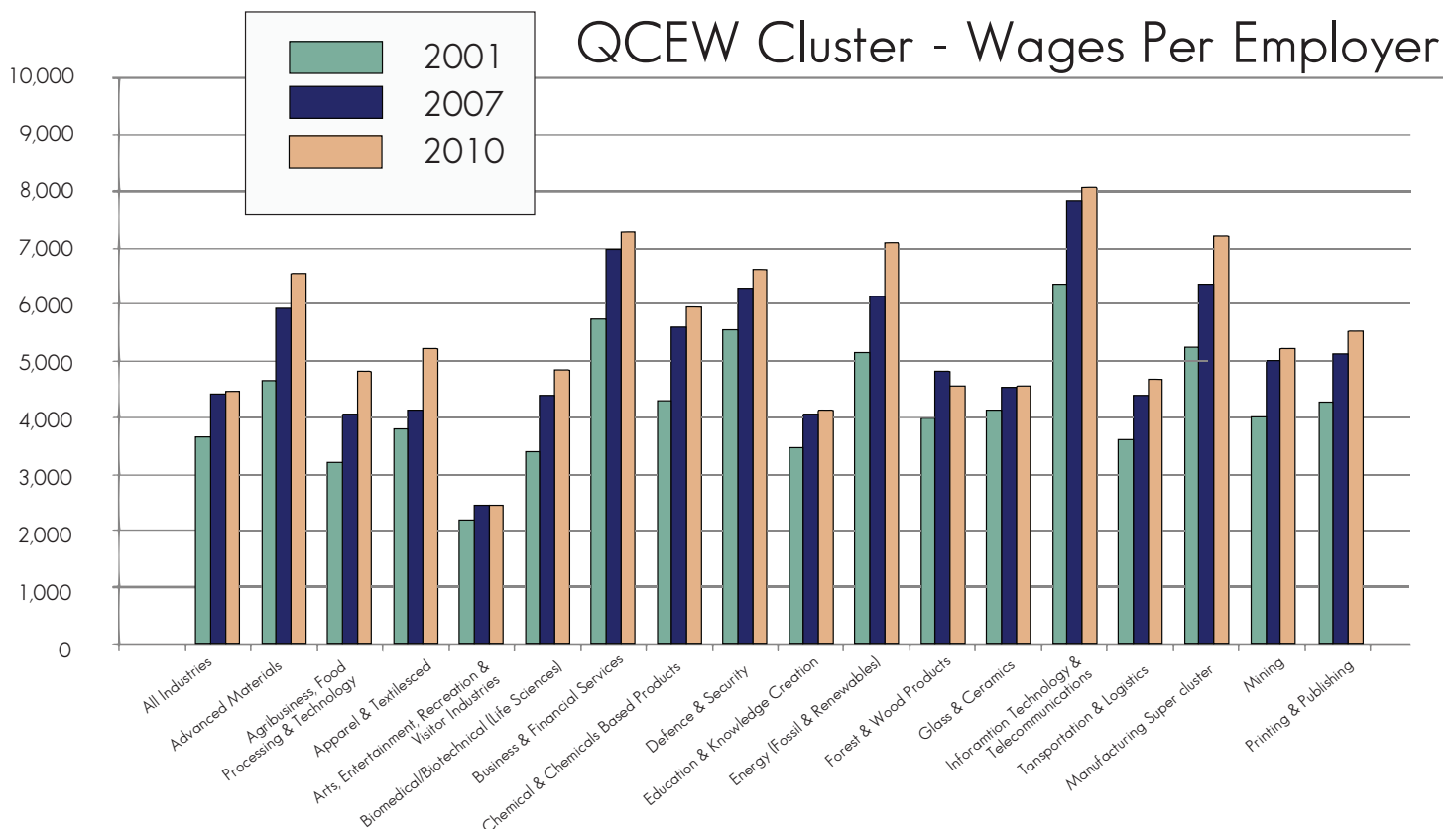
State of the Economy

An examination of annual wages per employee, as shown on the following table, reveals that the highly concentrated industry clusters in Rockingham County, New Hampshire also tend to pay above average wages. The graph below shows the trends in annual wages per employee for each Rockingham County industrial cluster.

QCEW CLUSTER - WAGES PER EMPLOYEE

Description	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Total All Industries	\$36,642	\$37,049	\$37,718	\$40,250	\$41,438	\$43,784	\$44,134	\$43,630	\$43,628	\$44,824
Advanced Materials	\$46,340	\$46,052	\$49,402	\$52,876	\$56,401	\$57,263	\$59,247	\$62,202	\$60,616	\$65,429
Agribusiness, Food Processing & Technology	\$32,048	\$36,969	\$38,179	\$36,870	\$36,215	\$38,790	\$40,678	\$42,496	\$44,171	\$48,276
Apparel & Textiles	\$38,189	\$38,479	\$38,914	\$41,454	\$45,909	\$39,976	\$41,384	\$42,479	\$43,897	\$52,080
Arts, Entertainment, Recreation & Visitor Industries	\$21,927	\$23,011	\$22,514	\$21,964	\$22,152	\$22,469	\$24,567	\$23,946	\$24,344	\$24,595
Biomedical/Biotechnical (Life Sciences)	\$34,030	\$34,729	\$36,253	\$38,836	\$40,323	\$40,867	\$43,777	\$47,532	\$47,027	\$48,460
Business & Financial Services	\$57,419	\$58,945	\$60,656	\$62,339	\$65,955	\$69,910	\$69,653	\$72,604	\$70,786	\$73,041
Chemicals & Chemical Based Products	\$42,922	\$43,132	\$45,400	\$48,550	\$50,384	\$52,524	\$55,812	\$56,256	\$59,124	\$59,759
Defense & Security	\$55,559	\$55,208	\$53,931	\$56,284	\$61,191	\$64,683	\$62,750	\$69,309	\$64,875	\$66,198
Education & Knowledge Creation	\$34,596	\$35,049	\$36,175	\$38,476	\$38,420	\$40,059	\$40,807	\$39,262	\$39,135	\$41,166
Energy (Fossil & Renewable)	\$51,670	\$50,933	\$54,747	\$56,902	\$57,053	\$58,112	\$61,305	\$67,378	\$65,687	\$70,876
Forest & Wood Products	\$39,842	\$39,748	\$40,600	\$43,341	\$41,937	\$43,742	\$48,143	\$46,626	\$45,113	\$45,478
Glass & Ceramics	\$41,261	\$37,641	\$38,953	\$40,995	\$43,441	\$43,622	\$45,345	\$43,819	\$42,151	\$45,634
Information Technology & Telecommunications	\$63,560	\$69,645	\$68,961	\$72,481	\$77,376	\$79,161	\$78,464	\$75,732	\$74,495	\$80,765
Transportation & Logistics	\$35,966	\$36,990	\$39,328	\$39,967	\$39,424	\$42,589	\$43,756	\$44,442	\$44,367	\$46,709
Manufacturing Supercluster	\$52,590	\$56,050	\$55,049	\$57,512	\$61,800	\$60,091	\$63,609	\$59,985	\$61,212	\$71,964
Mining	\$40,072	\$43,307	\$44,611	\$47,325	\$49,740	\$46,473	\$50,061	\$49,785	\$47,450	\$52,272
Printing & Publishing	\$42,747	\$42,603	\$44,116	\$45,727	\$50,541	\$47,756	\$51,319	\$51,789	\$50,824	\$55,247

Source: US Commerce Department's Economic Development Administration, Innovation in American Regions



Data Source: US Commerce Department's Economic Development Administration, Innovation in American Regions

Wage growth in the highly concentrated industry clusters in Rockingham County remained above average in the period 2001 to 2007, as well as in the Great Recession period 2007 to 2010. For example, while the average wage for all industries in Rockingham County grew by 3.1% annually from 2001 to 2007 and 0.5% annually from 2007 to 2010, the Advanced Materials industry cluster wages grew by 4.2% annually from 2001 to 2007, and 3.4% annually from 2007 to 2010. The Manufacturing Supercluster industry cluster wages also grew above average in both time periods – 3.2% annually from 2001 to 2007 and 4.2% annually from 2007 to 2010. The Chemical & Chemical Based Products industry cluster, another highly concentrated industry cluster in Rockingham County, grew by 4.5% annually from 2001 to 2007, and 2.3% annually from 2007 to 2010.

The table below shows the staffing pattern for one of the identified highly important industry clusters in Rockingham County, New Hampshire.

An analysis of staffing patterns for other industry clusters shows that with the exception of one industry cluster (Information Technology & Telecommunications Industry Cluster) Production Occupations make up 30% to 50% of the staffing within the critical industry clusters within Rockingham County, New Hampshire. Therefore workforce programs targeted at training for manufacturing and production would have significant value to the regions industry clusters.

STAFFING PATTERNS (OCCUPATIONS) FOR ADVANCED MATERIALS INDUSTRY CLUSTER

Occupation	Share of Employment	Share of Wages	Average Annual Wage
Production Occupations	41.90%	27.10%	\$34,129
Architecture and Engineering Occupations	15.00%	20.50%	\$72,096
Office and Administrative Support Occupations	10.60%	7.50%	\$37,360
Management Occupations	7.40%	17.10%	\$121,942
Business and Financial Operations Occupations	4.40%	5.50%	\$67,327
Transportation and Material Moving Occupations	4.10%	2.40%	\$30,554
Computer and Mathematical Occupations	4.10%	6.50%	\$84,992
Installation, Maintenance, and Repair Occupations	3.70%	3.20%	\$45,858
Life, Physical, and Social Science Occupations	2.80%	3.70%	\$68,551
Sales and Related Occupations	2.70%	3.60%	\$69,983
Construction and Extraction Occupations	1.40%	1.20%	\$45,179

Source: US Commerce Department's Economic Development Administration, Innovation in American Regions

Other Notable Changes in the REDC Region

There were several notable changes for major employers in the REDC region in the last year:

In November 2012 BAE Systems was awarded a \$41.3 million contract for laser-guided rocket weapons systems. The Nashua, NH location will get 70% of the work on the Advanced Precisions Kill Weapon System (APKWS), with the work to be completed in September 2014. In December BAE was awarded an \$81 million contract to produce components for anti-missile weapons systems, and another \$241 million for work on the F-35 Lightning II Joint Strike Fighter jet project. In January of 2013 BAE Nashua obtained a second contract associated with APKWS worth \$28 million to the defense manufacturing company. Even with all of the above extra work contracts BAE still laid off about 200 workers out of a workforce of 4,600 employees in the first quarter of 2013, due mostly the government spending cutbacks associated with sequestration.

Manufacturing activity in the city of Rochester included Safran, a French aerospace manufacturer building a 275,000 square foot advanced manufacturing facility, and Albany International, an advanced textiles and material processing company that moved its corporate headquarters from Albany, NY to Rochester in the year 2010.

A chemical company in Londonderry plans on hiring almost 100 more workers in the next two years. Kluber Lubrication North America Limited Partnership, a subsidiary of Freudenberg Chemical Specialties, provides seals and vibration control technology components, filters, nonwovens, release agents and lubricants for a variety of industrial sectors. The parent company also has facilities in Bristol and Northfield and is planning to hire at those locations as well.

Foss Manufacturing, a manufacturer of specialty non woven fibers, plans to invest \$15 million and create 150 new jobs in Rome, Georgia. However, the company also announced it is

committed to staying and expanding in New Hampshire as its home base. The company invested \$5 million in a new production facility in Hampton, New Hampshire, and has added 60 new employees since January of this year. The company currently employs about 400 people.

Companies are also relocating into New Hampshire from nearby Massachusetts. Aspen Technology, a supplier of software that optimizes process chemical manufacturing headquartered in Burlington, Massachusetts, is leasing new office space in Nashua, New Hampshire. Software engineers and quality assurance specialists will be operating from the Nashua office. BurstPoint Technologies moved its 20 employees from Westborough, Massachusetts to Merrimack, New Hampshire at the same time adding engineering and finance positions since making the move. The high-tech software company said the biggest reason for the move is the pool of senior technical talent available in New Hampshire.

On the negative side, GT Advanced Technologies in Nashua, an international supplier of components for the solar energy industry, is laying off 25% of its workforce. The company employed 650 people worldwide, with 250 working in Nashua and Merrimack, New Hampshire. The company noted that global demand for solar cells was slowing and prices were falling. The company also cited uncertain financial conditions in Asian markets, including import duties on Chinese goods coming into United States and Europe, as the reasons for the downsizing.

The Portsmouth Naval Shipyard had a civilian payroll of \$421 million in 2012 for 5,313 employees, most of whom live in New Hampshire and Maine. Although the number of jobs at the shipyard increased by 126 from 2011 to 2012, the year 2013 looks more uncertain. All of the current employees are facing up to a 20 percent cut in pay as a result of sequestration. At the end of April the shipyard plan was to furlough every employee once a week for 22 weeks pending some change to the sequester. Another impact, according to union representatives, is a higher than normal number of resignations and a higher rate of applications for retirement.

New Hampshire Economic Conditions

In addition to the series on the impact of the national recession on the New Hampshire economy, the monthly New Hampshire Economic Conditions reports provide ongoing information on the status of the New Hampshire economy. During the past year, these monthly reports have highlighted the following issues:

Population change, 2010 to 2011: Half of New Hampshire's counties lost population for the third year in a row

Since 2000, there has been a slow down in population growth throughout New Hampshire. On July 1, 2011, the U.S. Census Bureau estimated that there were 1,318,194 residents in New Hampshire. The population change from 2010 to 2011 was 1,387, the third year in a row that net population gain for New Hampshire was minimal – a sign that the state's population growth has stalled. The low growth rate can be attributed largely to domestic out-migration (people who move out of New Hampshire and go to another state). Many economists imply that this lull in migration was in response to lackluster job opportunities and current residents' inability to sell their homes during the latest recession.

The slow down in population growth prior to the Great Recession is evident in the county population estimates. Since 2005, several of New Hampshire's counties experienced weak population growth or even declines. The population in Coös County has been sliding downward continuously since 2005, and Cheshire County's population has been declining since 2007. The population in Belknap County has been flat since 2005. Geographic mobility nearly halted during the Great Recession. The state's estimated population rose by just 196 persons from 2008 to 2009. Over this period, six of New Hampshire's counties experienced population declines. From 2010 to 2011, this trend has continued with half of the counties showing a decline over the year. In contrast, Strafford County seems to be exempt from this slow down in population expansion, growing the fastest among New Hampshire counties over the period 2000-2011. **May 2012**

New Hampshire Employment Projections, 2010 – 2020

The Economic and Labor Market Information Bureau has recently completed New Hampshire industrial and occupational employment projections for 2010 – 2020. Over the ten-year period, employment in the state is expected to grow by 10.4 percent, an average of one percent per year. The 2010 estimated employment of 662,146 is projected to grow to 730,710 by 2020. Service-providing industries will continue to dominate New Hampshire's economic landscape, but positive growth is expected for Goods-producing industries as well. **June 2012**

Demographics of New Hires in the First Quarter of 2011

Between men and women, new hires were split fairly evenly, with about 16,000 each. Among the age groups, new hire employment ranged from 7,200 among those aged 25 – 34 years down to 550 for those aged 64 years and over. About two-thirds of new hires were employed in five industry sectors: Retail trade, Accommodation and food services, Health care and social assistance, Administrative/support

services and waste management, and Manufacturing. Retail trade had about 6,600 new hires, the largest share in total as well as for men, women, and each age group. **July 2012**

Alternative Measures of Labor Underutilization

Six alternative measures of labor underutilization have been available for states since 2009. These data are released on a quarterly basis in the form of a four-quarter moving average. The six measures of labor underutilization are based on results of the Current Population Survey and are designated as U-1 through U-6. The measure that uses the same criteria as the official unemployment rate is designated as U-3. Measures U-1 and U-2 are more restrictive than the U-3 while measures U-4 through U-6 are more inclusive. The U-6 is the most commonly quoted figure when discussing the “real” unemployment rate. The broadest measure of labor underutilization, it includes all those who meet the official definition of unemployed, plus those who want a job but have not looked for one in the past month, and those who are working part-time but want full-time work. Of course, by its very definition the U-6 is not an unemployment rate, because it includes persons who have jobs, though they are not working as many hours as they would like. The U-6 measure for New Hampshire was 11.2 percent for the four-quarter period ending June 2012. By comparison, the U-6 for the United States was 15.3 percent during the same period. **August 2012**

New Hampshire's Real Gross Domestic Product by State, 2011

The measure of economic health for U.S. states is the Gross Domestic Product by State. GDP by state is measured by incomes earned and costs of production by industry located within a state. Examples of income factors include rent received for land, housing, and patents (royalties), wages received for labor, interest received for capital investment, and profit received on entrepreneurship. New Hampshire's real GDP by state for 2011 was \$56.6 billion, an increase of 1.5 percent over-the-year. Nationally, the 2011 real GDP by state was \$13,108.7 billion, also increasing by about 1.5 percent over-the-year. The leading contributors to total real GDP by state for New Hampshire are Manufacturing, Real estate, rental and leasing, Government, Finance and insurance, Health care and social assistance, Retail trade, Professional, technical, and scientific services, and Wholesale trade. These eight sectors combined represented nearly 80 percent of total real GDP by state for New Hampshire in 2011. (There are 20 industry sectors in all, including Government.) The largest share of total real GDP by state for New Hampshire is in Manufacturing, with 15.5 percent of the state's GDP. This industry holds the largest share of total real GDP by state for the nation as well, with 12.8 percent. **November 2012**

New Hampshire's Change in Population and Demographics of Movers

As of July 2012, New Hampshire's resident population reached 1,320,718, an increase of 4,249, or 0.3 percent from the April 2010 decennial census results. The percentage change ranked 45th among all states including the District of Columbia. New Hampshire's resident population was the 10th smallest among all the states and the District of Columbia. Because state population counts vary widely, comparing relative size among states can distort the significance of numerical change. Percentage change provides a more representative comparison between all states.

In 2011, a total of 159,129 individuals changed residences within or moved to New Hampshire. Of those, 122,129 moved from one residence to another within the state, while 37,000 came from other states. Fourteen states each had more than 500 residents moving into New Hampshire, accounting for over 85 percent of domestic in-migrants in 2011. The three bordering states had the largest numbers of in-migrants to New Hampshire. Massachusetts far exceeded other state-to-state in-migrants with over 15,500. The state's other two neighbors had the next largest in-migration numbers: almost 3,100 from Maine and just over 2,100 from Vermont. The largest number of in-migrants from outside New England came from Florida, with 1,970 people moving to New Hampshire. **February 2013**

New Hampshire's Personal Income in 2012

New Hampshire's preliminary 2012 total personal income grew to \$62.15 billion (current dollars and not adjusted for inflation). This reflected an increase of 2.8 percent from 2011. While this was not as substantial as the 3.5 percent increase for the nation, it is the third year of positive change since the decline from 2008 to 2009, primarily the result of the recession (officially December 2007-June 2009) and its financial market crisis.

New Hampshire's size, both in residents and number of businesses, is difficult to compare with larger states like California and New York. Per capita personal income allows for an equalized comparison of personal income among states of different sizes. Simply put, per capita personal income (PCPI) is the result of dividing a state's total personal income by the number of residents, including all persons, in the state. New Hampshire's preliminary 2012 per capita personal income was \$47,058. This was an increase of 2.6 percent over-the-year, ranking ninth highest among the states (not including District of Columbia) and higher than the national average of \$42,693. Matter of fact, five of the six New England states (excluding Maine) had a PCPI higher than the national average. **April 2013**

Past Year's Activities

The Regional Economic Development Center of Southern New Hampshire (REDC) continued to build upon its partnership with the Economic Development Administration (EDA) of the U.S. Department of Commerce. Working in collaboration with the Rockingham Planning Commission (RPC) and the Nashua Regional Planning Commission (NRPC), REDC has fulfilled its responsibilities as the designated administrator for the Rockingham Economic Development District (EDD). Not only has REDC maintained its annual "grass-roots" CEDS planning process, supported regional economic development projects and provided technical assistance to economic development stakeholders at the local level, the agency has also increased funding opportunities for its communities and embraced the expansion of the EDD to include additional communities.

Program and Project Highlights

REDC continued its partnership with EDA through the maintenance of the "comprehensive, continuous grass-roots" CEDS planning process that has resulted in the Annual CEDS Update for 2013. Through the use of the EDA Planning Investment Grant, REDC has brought together economic development stakeholders in the region through four (4) CEDS Steering Committee meetings, outreach to the municipalities, non-profits and the business community and sponsorship of forums.

Below is a summary of the program and projects REDC participated in or helped facilitate during the 2012-2013 CEDS planning cycle.

1. CEDS

a. REDC held four (4) CEDS meetings, one each in November 2012, February 2013, May 2013 and June 2013.

b. In October–December 2012, REDC collected updates to and submissions for new projects for the CEDS Priority Project List.

c. In February–April 2013, REDC worked with two University of New Hampshire undergraduate economics students who studied the

proposed Hampton Intermodal Transportation Center. They presented their findings at the May 2013 CEDS meeting, which was covered by the press.

d. In March–April 2013, REDC worked in conjunction with the local Regional Planning Commissions to complete the data collection for the 2013 CEDS update. In addition, several key sections of the update were completed.

e. In April–June 2012, REDC completed the 2013 CEDS update.

f. In June 2013, REDC held the fourth and final CEDS Steering Committee meeting to review the CEDS Update. In addition, the REDC Board of Directors approved and ratified the 2013 CEDS Update.

2. Lending

Besides serving as the administrative entity for the Rockingham County EDD, REDC manages the Regional Revolving Loan Fund (RLF) for thirty-one communities in Rockingham County NH and five communities in Hillsborough County, as well as manages Community Development Block Grant (CDBG) funds to non-entitlement communities in the Counties. Each year millions of dollars revolve out of our REDC's RLF, which create or retain hundreds of jobs in the Region. Many businesses, in addition to those who are funded through REDC, receive technical assistance on business planning both directly from REDC and through

our partnership with the NH SBDC. Additionally, REDC manages a revolving loan fund of \$1,000,000 under the Intermediary Relending Program (IRP) for the United States Department of Agriculture (USDA Rural Development.



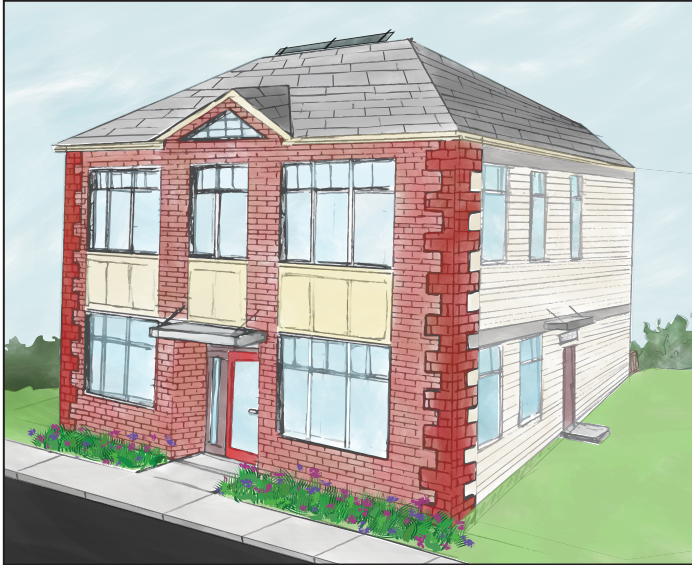
The Zickell Family, (Bob Zickell pictured here) has received assistance from REDC in financing for start-up businesses over the past twenty years.

3. Smuttynose Brewery Expansion

The sewer line extension project (the part of the project partially funded by EDA) reached substantial completion in March 2013. REDC is working with the Town of Hampton to close out the EDA public works grant.

4. Brownfield's EPA grant award

REDC received a \$1 million dollar Brownfield's grant, which took effect October 1, 2010. This fund is used to make loans and grants to clean up Brownfields sites throughout the Region. This supports the CEDS goal of redeveloping Brownfields sites. Currently REDC has two Brownfield's projects. The Town of Hudson's grant for the remediation of a site to develop a recreation field went out to bid in March 2013. Work is expected to begin in May 2013. The second project is the remediation and conversion of a mill building to low-income housing in the City of Nashua. In this case, REDC is providing a \$160,000 loan to a developer to clean up the site. Remediation is expected to begin in the summer of 2013.



Artist Rendering of the REDC Regional Business Development & Training Center.

5. Events and Outreach

REDC continues to present at business expos, chamber of commerce events, planning boards and commissions, and economic development committee meetings, as well as working with congressional representatives to further infrastructure improvements in the region, encourage regional cooperation and promote grass roots economic development at the town, regional and state levels.

6. REDC Regional Business Development & Training Center

The plans and specs for our new Training Center were approved by EDA in March 2013 and the project went out to bid in April 2013. A successful bidder was selected, and a contract was awarded in May 2013. The project is on schedule for a December 2013 completion date.



REDC Board of Directors and friends at the ground breaking at the future home of the REDC Regional Business Development & Training Center: Left to Right: Peter Reno, Senior Vice President, Enterprise Bank; Dan Gray, Executive Director, Coastal Economic Development Center; Wesley Moore, REDC Vice Chair; Paul Deschaine, REDC Board Member; Robert McDonald, REDC Board Member; Warren Henderson, REDC Chair; Craig Wheeler, Raymond Town Manager; Laurel Bistany, REDC Executive Director; Audry Goudie, NH Electric Co-Op; Carol Estes, REDC Board Member; Scott Zeller, REDC Board Member; David Bickford, REDC Board Member; and Thomas Conaton, REDC Board Member.

REDC CEDS Priority Projects

Project Selection Criteria Using the 2012 CEDS Priority Project List, REDC utilized its “RFP” (Request for Projects) process to update and create the 2013 Priority Project list. The RFP solicitation is mailed to all communities within the CEDS Region, and any other group that had a project on the 2012 list. REDC put together a package consisting of the 2012 Priority Project list, the 2010-2014 CEDS Goals and Objectives, the CEDS Project Criteria, an explanation of the CEDS process and projects, and a new Project Submission form. In addition, a form for “updates” to existing priority projects was included for those communities with projects already on the list. Forms were also available on the REDC website. Current project proponents received the CEDS Project Update form via email, postal service mail and a follow-up telephone call.

After collecting the new and updated project proposals, REDC staff reviewed each to ensure compliance with at least one of the six CEDS goals and objectives. Projects were presented to the CEDS Steering Committee throughout the year, and each new project was discussed in detail with the project proponents. REDC staff made recommendations for additions and changes to the CEDS Priority Project List based on its review of the materials submitted by the municipalities and organizations. The finalized list with

recommendations was presented to the CEDS Steering Committee, which ratified the list at its May 2013 meeting.

2013 Priority Project List The RPF process brought in three new priority projects (see facing page) for the 2013 CEDS Update. In addition, there were five projects removed from the list. The Route 28 widening project in Derry and the Route 102 water line project in Raymond were both completed during the past twelve months. Due to uncertainty in fishing regulations and a downturn in the economy, the Yankee Fisherman’s Cooperative opted to remove the Fish Processing project. In Exeter, the Train Station parking project was removed due to unresolvable funding issues, and the Alrose Multi-Family project was removed due to changes in ownership of the site.

Hampton’s Smuttynose Brewery infrastructure improvement project is nearing completion, and at the time of writing this update is in the grant closeout stages. It is expected that the sewer line expansion will be completed by late spring, 2013. For more detailed updates regarding each project, please refer to the Priority Project List, Project Matrix and Project Details sections, starting on page 60.



The Newmarket Mills, located on Main Street in Newmarket, is an outstanding example of mixed-use economic redevelopment within a community. (Courtesy of Eric Chinburg)

Workforce Housing Priority Project Success Story

The redevelopment of downtown Newmarket has been on the CEDS Priority Project list in one iteration or another for over ten years. One of the goals of the Lamprey River Mill Re-Development Priority Project is to redevelop the existing mill buildings for mixed use including residential, retail and office units. REDC is happy to report that one-hundred percent of the private portion of first phase of the project is complete and leased. The project (developed under the name The Newmarket Mills) has become an important part of this community. By restoring and reusing the historic mills, the project created 112 loft, one bedroom, and two bedroom units of workforce housing and over 50,000 square feet of commercial space.

New Priority Project Details

The following is a descriptive listing of the three new priority projects on the 2013 list.

North Main Street Water Line Extension

Location: Newmarket

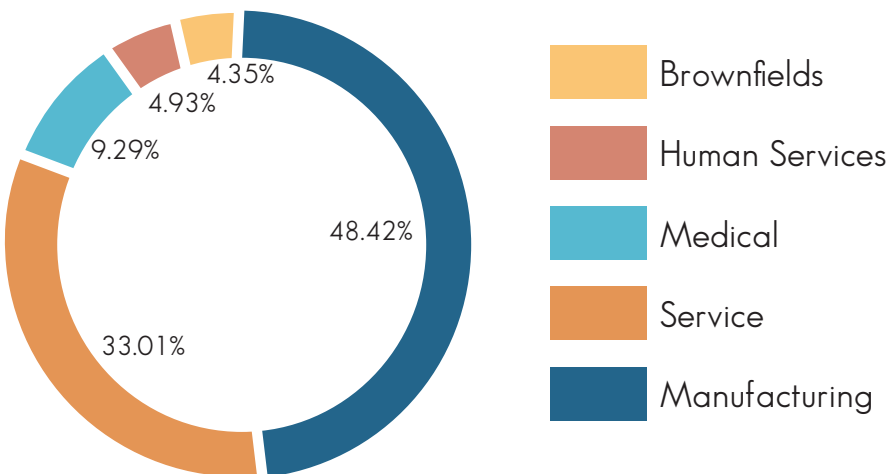
Project Description: A recent Water System Master Plan update for the Town identified that the existing capacity along North Main Street (Route 108) from Bay Road to Simons Lane is not adequate and is in need of upgrades. Currently there is a developer interested in developing vacant land along this strip of roadway, but the cost to upgrade the infrastructure is a limiting factor. This project proposes to complete the necessary upgrades by replacing approximately 1,600 LF of 6" water line with 8" water line. This project supports the CEDS Goals of Economic Development (1) and Infrastructure Development (2).

Timeframe: SHORT TERM



Downtown Newmarket, NH.

The REDC Revolving Loan Fund Portfolio by Industry



REDC Revolving Loan Fund Program

Location: Region-wide

Project Description: REDC plans to apply to EDA for a RLF to supplement existing loan funds. The money will be used to make loans to new and existing businesses across our region. REDC plans to apply for a \$250K-\$500K loan. The source of matching funds has not been determined at this time. This project supports the CEDS Goal of Economic Development (1).

Timeframe: SHORT TERM

YMCA Exeter Project

Location: Exeter

Project Description: The Southern District YMCA is proposing to develop a 30,000 sf YMCA in two phases at the site of the former Exeter Junior High School. The asbestos-contaminated school was demolished and site was cleared between September 2012 and February 2013. The first phase of the facility will contain a Wellness Center, Indoor Track, Gymnasium, Community room and other features. The second phase will involve the development of an Aquatics center. The project will create 15 new jobs during the first phase and 15-20 new jobs in the second phase. This project supports the CEDS Goals of Economic Development (1) and Environmental Preservation (6).

Timeframe: SHORT TERM



Artist Rendering of future Exeter YMCA. (Image courtesy of Southern District YMCA)

Priority Projects by Location and Duration



Short Term



Intermediate



Long Term

Derry



Route 28 Water & Sewer Expansion

Newmarket



Black Bear Business & Industrial Park



North Main St. Water Line Extension



Lamprey River Mill Redevelopment

Exeter



YMCA Exeter Project

Pelham



Pelham Route 38 Water/Sewer Study

Hampton



Hampton Intermodal Transportation Center



Infrastructure Improvements for Smuttynose Expansion

Plaistow



Water/Waste Water Engineering & Needs Assessment



Development of Railroad Station

Londonderry



Pettengill Road Commerce Park

Portsmouth



Regional Biosolid/Septage Treatment Facility



Greenland Well Upgrade



Route 1A Sagamore Bridge Replacement

Nashua



Mohawk Tannery Cleanup & Redevelopment



Bridge St. Waterfront Development Site



Front & Franklin St. Mill District

REDC/Region-wide



REDC Revolving Loan Fund

Raymond



Flint Hill Eco-Sensitive Low Impact Design Business Park



Town of Raymond Route 101 Exit 4 Development



Exit 5 Economic Development Master Plan



REDC Business & Development Training Center

Seabrook



NH Route 107 I-95 Bridge Expansion



Route 1 Expansion South of Route 107



Route 107 West Development & Master Plan

Stratham



Stratham Town Center Project



Water Supply System Construction
(Water System Phase III)



Sewer Collection/Treatment/Disposal Design
(Waste Water System Phase II)



Waste Water System Construction
(Waste Water System Phase III)



Stratham Gateway Project



Well Development/Testing/Permitting
(Phase 1)



Waste Water Disposal/Testing/Permitting
(Waste Water System Phase I)



Water System Treatment/Storage/Distribution
Design (Water System Phase II)

Short Term

- Route 28 Water & Sewer Extension
- YMCA Exeter Project
- Infrastructure Improvements for Smuttynose Expansion
- Pettengill Road Commerce Park
- Front & Franklin Street Mill District
- Bridge Street Waterfront Development Site
- Lamprey River Mill Re-development
- North Main Street Water Line Extension
- Development of Railroad Station
- Greenland Well Upgrade
- Route 1A / Sagamore Bridge Replacement
- REDC Regional Business Development & Training Center
- Exit 5 Economic Development Master Plan
- NH Route 107 / I-95 Bridge Expansion
- Route 1 Expansion South of Route 107
- Route 107 West (of I-95) Development & Master Plan
- Stratham Gateway Project
- Well Development/Testing/Permitting
(Water System Phase I)
- Water System Treatment/Storage/Distribution Design
(Water System Phase II)
- Waste Water Disposal/Testing/Permitting
(Waste Water System Phase I)
- REDC Revolving Loan Fund (RLF)

Intermediate

- Mohawk Tannery Cleanup & Redevelopment
- Black Bear Business & Industrial Park
- Water/Waste Water Engineering & Needs Assessment
- Town of Raymond Route 101 Exit 4 Development
- Water Supply System Construction
(Water System Phase III)
- Sewer Collection/Treatment/Disposal Design
(Waste Water System Phase II)
- Waste Water System Construction
(Waste Water System Phase III)

Long Term

- Hampton Intermodal Transportation Center
- Pelham/Route 38 Water/Sewer Study
- Regional Biosolids/Septage Treatment Facility
- Flint Hill Eco-Sensitive Low Impact Design Business Park
- Stratham Town Center Project

2013 REDC /CEDS Priority Project Matrix

1 = Economic Development
2 = Infrastructure Development
3 = Regional Cooperation

4 = Workforce Development
5 = Workforce Housing
6 = Environmental Preservation

Project Name & Proponent	Project Description	Estimated Cost & Possible Funding Source	Start Date	Update	Goals
Short Term					
Route 28/Manchester Road Widening Project Derry	Reconstruction of approximately 3,350 sf (0.65 miles) of Route 28, a vital industrial and municipal corridor.	\$6.5 million Funding secured	NA	Project completed. REMOVE FROM LIST.	2
Route 28 Water & Sewer Extension Derry	Extend utilities to town line for future development.	Phase 1: \$850,000 Phase 2: \$3.5 million Local, Private, EDA	2013	The Town opened bids in April 2013 for a construction of a bridge replacement, water main replacement, new sewer main, drainage and road reconstruction. Along Route 28. (Phase 1). Phase 2: additional water & sewer infrastructure. Plans to advertise bid late 2013. This work is predicated upon the Derry Town Council ratifying proposed zoning changes in the 2013.	1, 2, 4
YMCA Exeter Project Exeter/ Southern District YMCA	Demolition of abandoned asbestos contaminated building, cleanup of site, construction of 30KYMCA in 2 phases.	Cleanup & Phase 1: \$4 million; Phase 2: \$2 million. Private, YMCA fundraising, Tax credits,	On-going	NEW PROJECT.	1, 6
Exeter Train Station Parking Area Expansion Exeter	Expansion of existing parking area adjacent to the Exeter Train Station.	\$1.35 million Local, private, CMAQ, DOT, TIF	N/A	Due to funding issues, the town has requested the project be REMOVED FROM THE LIST.	2, 6
Infrastructure Improvements for Smuttnose Expansion Hampton	Completion of required offsite improvements and construction of a LEED certified development to expand current business.	Infrastrctr: only: \$700,000 EDA, State, Local, private	2012	The sewer line expansion and associated pump house have been constructed. The EDA grant is in closeout stages and expected to be completed in late spring 2013.	1, 4, 6
Pettengill Road Commerce Park Londonderry	Develop new roadway/ boulevard to gain access to over 1000 acres of commercial/industrial land.	\$12.3 million EDA, TIF, local, private	2013	The town completed an economic viability analysis of the site and continues to investigate funding opportunities.	2, 3, 4

Project Name & Proponent	Project Description	Estimated Cost & Possible Funding Source	Start Date	Update	Goals
Front & Franklin Street Mill District Nashua	Redevelopment of mill district to private, mixed-use with public infrastructure.	Infstr only: \$3.1 million Private, TIF district, local, Federal, EDA	On-going	The Cotton Mill Square mill has received all permits & is scheduled to break ground Jan. 2013. The Broad Street Parkway project has broken ground, and the City is finalizing plans for the Nashua River Bridge & intersection that will provide direct access to this area. In addition, REDC is working with the developer of this project on a Brownfields remediation loan.	2, 5, 6
Bridge Street Waterfront Development Site Nashua	Rebuild at 30-acre site into mixed-use, new-urbanist designed community.	\$4.3 million NH DOT, EPA Brownfields, private, TIF, EDA	2013	A developer has completed a site plan for Phase I of the project (229 units of housing & 8200 sf commercial space); ground breaking expected Fall 2013. The City has finalized waste water plans for this area. Moved from Intermediate.	2, 6
Lamprey River Mill Re-Development Newmarket / Newmarket Community Development Corp.	Purchase and renovate historic mill building for mixed use.	\$8.5 million EDA, state, DOT, local, private	On-going	100% of the private portion of Phase I of the project is complete & leased. Town has hired an engineer to conduct feasibility study for enclosed pedestrian bridge to parking area (NHDOT grant). Phase 2 involves development of 3 acres of vacant land adjacent to the public library. The developer is gearing up to begin Phase 2.	1, 2, 4, 6
North Main Street Water Line Extension Newmarket	Replace and upgrade existing waterline to accommodate additional economic development.	\$430,000 Local, impact fees, EDA	2013	NEW PROJECT.	1, 2
Development of Railroad Station Plaistow	Construct railroad station for regional access to existing commuting routes.	\$8.4 million EDA, CMAQ, local, Brownfields, MBTA	On-going	Town and NHDOT have received letters of intent for the initial feasibility and environmental studies. A consultant has been identified & negotiations are ongoing. A list of tasks has been identified and next steps are to finalize and obtain approval of a contract before beginning studies.	1, 2, 3, 4
Greenland Well Upgrade Portsmouth	Upgrades at Greenland Well to improve reliability & efficiency of region's water source.	\$1 million Municipal Bonding	2013	No changes. Ready to begin as soon as funds are available.	2, 3, 6
Route 1A / Sagamore Bridge Replacement Portsmouth	Replacement of outdated bridge that carries loads well in excess beyond designed limits.	\$5 million State Funding secured	2013	NH DOT made interim structural improvements and postponed full-scale replacement to 2013-2014.	2, 3, 4

REDC CEDS Priority Projects

Project Name & Proponent	Project Description	Estimated Cost & Possible Funding Source	Start Date	Update	Goals
Raymond Route 102 Water Line Extension Raymond	Water line extension of approx. 2 miles from 102/107 intersection.	\$2.5 million US EPA/ NHDES	2010	Project completed. REMOVE FROM LIST.	2, 3, 6
REDC Regional Business Development and Training Center REDC sponsored Located in Raymond	Construction of new 5,000 sf regional business development and training center with new REDC offices.	\$1.1 million EDA, REDC, CDFA tax credits, USDA	2012	Project awarded EDA Public Works grant for \$432,185 in 2012. Hired A/E in Oct. 2012 and completed designs in March 2013. Contract awarded in May 2013. Construction scheduled to begin Spring 2013.	1, 3, 4, 6
Exit 5 Economic Development Master Plan Raymond	Development of Master Plan and economic growth strategy for the area surrounding Exit 5 off Highway 101.	Master plan only: \$30,000 Project: \$10 million CTAP, public, private, local	2013	Due to the recent completion of installation of a water line along Route 102 & rezoning part of the this area, interest to complete the Master Planning for the Route 5 area has gained momentum. In addition, Raymond is working with a developer who owns several parcels in the project area. Moved from Intermediate.	1, 2, 5, 6
NH Route 107 / I-95 Bridge Expansion Seabrook	Widening a bridge that provides access to the Seabrook business district and is the connector b/w eastern and western portions of the town.	\$6.4 million Private, State, local	2012	NH DOT construction of the project is currently underway. Estimated completion is late 2013.	1, 2, 3
Route 1 Expansion South of Route 107 Seabrook	Widening main road through Seabrook business district for improved traffic flow.	\$1.5 million Private businesses, State DOT, local	2013	Preliminary roadway design work is underway. NH DOT will need to obtain additional strips of land for work. Negotiations with land owners to begin in 2013. Funding in place.	1, 2, 3
Route 107 West (of I-95) Development Master Plan Seabrook	Plan to evaluate & analyze the feasibility for the highest & best future development of Route 107 in Seabrook, west of the interchange with I-95.	\$50-60,000 for study only Public funding, private developers	2013	The Town was awarded a \$19,000 NHHFA Challenge Grant for the analysis and best use of Route 107 between Route 1 and Kensington. Rockingham Planning Commission will oversee consultant selection.	1, 2
Stratham Gateway Project Stratham	Upgrade water lines in business corridor for job growth.	\$1 million EDA, local, private	2013	In 2013, the Town will seek to change zoning in this area. Stratham continues to move forward with work to upgrade infrastructure and utilities.	2, 6

Project Name & Proponent	Project Description	Estimated Cost & Possible Funding Source	Start Date	Update	Goals
Well Development/ Testing/Permitting (Water System Phase I) Stratham	Complete analysis of 2 potential well sites, construct production well, test water quality/quantity, seek NHDES permits to use as water supply for Rt 108 commercial corridor/Town Center.	\$150,000 Local, state, coastal	On-going	The Town, in conjunction with Exeter & RPC, completed a study entitled "Exeter/Stratham Intermunicipal Water and Wastewater System Study" in Dec. 2012. The findings of the study indicate that there would be significant savings if the two towns completed a collaborated effort. Based on this, Stratham is continuing discussions & negotiations with Exeter. In addition, the Town has approved funding to continue studying and planning its own system in case the collaborative solution does not work.	1, 2, 3, 6
Water System Treatment/ Storage/ Distribution Design (Water System Phase II) Stratham	After Phase I completed: design a water supply treatment, storage and distribution system for 108 corridor /Town Center. May be a multi-jurisdictional project with Exeter.	\$400,000 TIF, State revolving funds, bonds, local	2013	This phase is dependent on the results of Phase I.	1, 2, 3, 6
Waste Water Disposal/ Testing/ Permitting (Waste Water System Phase I) Stratham	Evaluation and testing of potential site for waste water discharge for Rt 108 commercial corridor/Town Center; obtain DES permits.	\$175,000 Local, state, coastal	On-going	The Town, in conjunction with Exeter & RPC, completed a study entitled "Exeter/Stratham Intermunicipal Water and Wastewater System Study" in Dec. 2012. The findings of the study indicate that there would be significant savings if the two towns completed a collaborated effort. Based on this, Stratham is continuing discussions & negotiations with Exeter. In addition, the Town has approved funding to continue studying and planning its own system in case the collaborative solution does not work.	1, 2, 3, 5, 6
REDC Revolving Loan Fund REDC/ Region-wide	Establishment of an EDA RLF to supplement existing loan funds. The money will be used to make loans to new & existing businesses across the region.	Total funds: -\$500K - \$1 million 50% RLF EDA grant; 50% TBD	2013	NEW PROJECT.	1

Project Name & Proponent	Project Description	Estimated Cost & Possible Funding Source	Start Date	Update	Goals
Intermediate Projects					
Alrose Multi-Family Workforce Housing Project Exeter	Purchase site of former Alrose Shoe factory to redevelop for multi-family affordable units.	\$5.85 million NHFA, CDBG tax credits, private	NA	The property was sold to a new owner who is not interested in pursuing the existing Workforce Housing project. Town has requested the current project to be REMOVED FROM THE LIST.	5
Mohawk Tannery Cleanup & Redevelopment Nashua	Revitalization of former tannery site, cleanup, and reuse of 39-acres for mixed use.	\$5.65 million Private, EPA, EDA, Federal	2011-2015	The City has broken ground on the Broad Street Pkwy project, which will provide access to the site.	2, 5, 6
Black Bear Business and Industrial Park Newmarket	Development of area for industrial/commercial use, new access and rail upgrades.	\$12 million Private, TIF, EDA	Unknown	A group of investors who are interested in developing a portion of the site has approached the Town. Work continues on investigating access options for the site. Town is looking to conduct a marketing & development feasibility study, which would be in the short term time frame.	1, 2, 4
Water/Waste Water Engineering & Needs Assessment Plaistow	Update a comprehensive engineering and needs assessment report from the 1970s addressing water supply and wastewater treatment.	\$150,000 EPA, USDA, State, local	2012-2015	The Town continued talks with Pennichuck East Utility, (PEU) on the feasibility of providing water service to Plaistow. The Town has on its 2013 warrant to conduct a feasibility study to evaluate using the Town's fire protection system as a potable water system.	2, 6
Town of Raymond Route 101 Exit 4 Development Raymond	Development of 300 acres for mixed use and wastewater treatment.	\$80 million EDA, TIF, USDA, CDBG, private	2013-2015	Clean-up of the site for construction of a waste water treatment facility is near completion. A developer is working with the town to develop a 39-acre parcel in the project area. Moved from Long Term.	1, 2, 3, 4, 5, 6
NH Community Fish Processing Facility By Yankee Fisherman's Cooperative (YFC) 'YFC sponsored located in Seabrook	Construct a small-scale fish processing facility adjacent to the YFC building. Will allow for NH commercial fishermen ability to direct market and diversify current products.	\$1 million EPA	NA	Due to uncertainty in fishing regulations, and downturn in the economy, the Coop opted to open a smaller retail store at their existing site instead of the processing plant. REMOVE FROM LIST.	1, 3, 6

Project Name & Proponent	Project Description	Estimated Cost & Possible Funding Source	Start Date	Update	Goals
Sewer Collection/ Treatment/ Disposal Design (Waste Water System Phase II) Stratham	After Phase I completed: design a sewer collection, treatment, and disposal system for I08 corridor/ Town Center. May be a multi-jurisdictional project with Exeter.	\$600,000 TIF, state revolving funds, bonds, local	2013-2014	This phase is dependent on the results of Phase I.	1, 2, 3, 5, 6
Waste Water System Construction (Waste Water System Phase III) Stratham	After Phase II completed – construct waste water system for I08 corridor/Town Center. May be a multi-jurisdictional project with Exeter.	\$6million TIF, state revolving funds, bonds, local	2015	This phase is dependent on the results of Phase II.	1, 2, 3, 5, 6
Long Term Projects					
Hampton Intermodal Transportation Center Rockingham Planning Commission with Hampton	Development of an intermodal transportation center at the Route I – Hwy I0I interchange - constructing new center w/ park and ride facility, and several multi-user transportation participants.	Center: \$3.5-4 million With road recon-figuration: \$I9 million Federal Highway programs (CMAQ), state DOT, Brownfields	Feasibility study: On-going. Unknown for project	Project Advisory Committee formed in 2012. Phase II Brownfields site analysis started in Fall 2-12 & on-going. Consultant hired to provide preliminary designs. RPC working on cost & ridership estimates for various transportation alternatives. Anticipated preliminary study results Summer 2013.	1, 2, 3, 6
Pelham/Route 38 Water/Sewer Study Pelham	Engineering study to determine how to provide infrastructure along Pelham's business corridor to foster economic growth and development.	\$30,000-\$50,000 Unknown	2013-2015	Trying to identify funding sources. No changes.	2, 6
Regional Biosolids/ Septage Treatment Facility Portsmouth	Design and construction of a regional biosolid/septage treatment and energy recovery facility.	\$6-7 million Private, user fees, local, State/Fed grants, EPA, EDA	2014-2016	Project moving forward. No changes.	1, 2, 3, 6
Flint Hill Eco-Sensitive Low Impact Design Business Park Raymond	Development of 70-acre town-owned parcel into an eco-sensitive, low impact business park.	\$1.2 million TIF District, private, EDA, public grants	unknown	Due to economic conditions, the prjct has not moved forward, but still remains set aside for development. Moved from Intermediate.	1,2
Stratham Town Center Project Stratham	Infrastructure Improvements and Master Plan study aimed at increasing development potential, future job growth and housing needs.	\$90,000 Local – municipal	2010-2015	Work continues on the Master Plan for the ara. Final plan from 2-day charrette completed in Sept 2012. The Town submitted a proposal to the NHDOT, (via RPC) as part of their 10-year Transportation Improvements Program, (TIP). The project is currently under review. The project includes the installation of two roundabouts, bike lanes, and pedestrian sidewalks.	1, 2

Short Term Actions for 2013–2014

REDC will continue to meet its obligations as an Economic Development District (EDD) by (1) coordinating and implementing economic development activities in the District, (2) carrying out economic development research, planning, implementation and advisory functions identified in the CEDS and (3) coordinating the development and implementation of the CEDS with other local, state, federal, non-profit and private organizations.

For the 2010 CEDS, through a grass-roots planning process and with public input, REDC developed CEDS goals and objectives for the current five-year cycle. REDC and the other economic stakeholders in the region continue to address these goals and objectives with an on-going approach. The status of these goals is discussed in the Evaluation section of the CEDS. However, the Short-Term Actions for the period from July 1, 2013 to June 30, 2014 will be as follows:

I. Continue CEDS “grass-roots” planning process:

- Implement the EDA Planning Investment and update the 2010 CEDS for 2014 (June 30, 2014);
- Schedule four (4) CEDS Steering Committee meetings as part of the program year;
- Maintain the required percentage of private sector representatives on the CEDS Steering Committee. If we fall below that percentage, then identify, recruit, train and orient private sector representatives for the CEDS Steering Committee. Key areas of interest include new and emerging technologies, expertise in green technologies, banking and financing, as well as real estate development;
- Maintain Evaluation as an ongoing process;
- Update existing and identify new Priority Projects as part of the CEDS planning process;
- Host one to two public forums that focus on events and/or topics relevant to economic development in our region and in line with the goals of the CEDS; and
- Provide demographic data and information developed through five-year CEDS process to municipalities, businesses, non-profit groups and the public through an enhanced website and regular electronic updates.

2. Provide support for local economic development efforts:

- Begin the construction of the REDC Regional Business Development & Training Center. Provide local entrepreneurs with access to instruction, computers, and reference materials to facilitate the creation of new rural businesses and the expansion of existing businesses;
- Increase outreach to local communities in identifying and implementing Priority Projects through general technical assistance and recommendations;
- Continue work with the Brownfield's Advisory Committee to redevelop blighted areas and encourage economic growth;
- Meet with representatives from “pockets of distress” communities to identify infrastructure and community needs;
- Pursue CDFI designation to provide additional resources to our Region;
- Provide funding for local projects that support the CEDS Goals and Objectives through the availability of additional EDA project funds; and
- Assist other communities as requested.

3. Assist and provide technical assistance for regional economic development projects:

- Continue to provide grant and loan opportunities to the Region with the REDC \$1 million EDA Brownfield's grant;
- Provide technical assistance and support to municipalities in identifying federal, state, non-profit and private funds to support their economic development activities;
- Provide technical assistance to the proponents of this year's Priority Projects, as needed. Identify key Priority Projects that are eligible for EDA funding opportunities. Provide grant writing and management assistance as needed for these projects;
- Partner with state agencies to educate businesses about the availability of stimulus funds for infrastructure improvements and energy efficiencies; and
- Provide technical assistance and financing for expanding businesses that create jobs.

Evaluation

REDC seeks to evaluate our 2013 plan for the purpose of determining our success in meeting both our goals as well as EDA priorities. This evaluation component will be fairly broad in addressing each of these areas, while specific enough to quantify the results achieved by the Regional Economic Development Center of Southern New Hampshire.

REDC established an evaluation methodology that focused upon quantitative and qualitative measures related to program performance. The evaluation process reviews the actions from the past twelve months as part of its annual CEDS update. REDC evaluates the effectiveness of the CEDS Process, headway made towards CEDS Goals attainment, progress made on the CEDS Projects, and the extent to which we are achieving our Short Term Actions (which include the goals of the EDA annual planning grant).

Documentation of CEDS Process

REDC utilizes the EDA Guidelines and recommendations for developing the CEDS document. The first step in the process was to create the 2013 CEDS Steering Committee (outlined in the next section). The Steering Committee met several times throughout the CEDS process, providing valuable input and feedback into the development of this document. REDC worked with staff from both inside and outside its own organization to provide the necessary data, maps and text to create the written document. The staff worked closely with the Steering Committee to complete the 2013 CEDS Update.

Evaluation of Past 12 months

Evaluation of CEDS Process

Levels of Participation Goal



To encourage a high level of participation in CEDS activities by a diverse group representative of both municipal and business leaders.



The REDC CEDS Steering Committee had four regular meetings this year which were attended by an average of thirteen individuals. These meetings were attended by a broad cross section of private business persons, municipal employees, economic development and planning practitioners, as well as elected officials. The meetings were held throughout the CEDS region in order to accommodate and encourage as many members as possible to participate.

In addition to the Committee meetings, REDC worked with two University of New Hampshire economic major students, who interned with REDC as part of their classwork. The two students reviewed the economic feasibility and impacts of

a proposed intermodal transportation center in Hampton, NH. Their work was presented at a publically-open CEDS meeting.

Data Development and Dissemination



To provide comprehensive data and other statistical analysis tools for the region's economic development stakeholders; and to have that body of work "recognized" as an all-inclusive source of current information on each of the towns that comprise the region.



Through the development of the CEDS, REDC maintains current and accurate demographic and other data on all towns, projects, available real estate sites, and companies in the region. This data is gathered by the Rockingham Planning Commission (RPC) and is compiled by REDC's Planner into the comprehensive information contained in the CEDS.

Development of the 2013 CEDS Update included reporting on the new 2007-2011 U.S. Census American Community Survey data. The CEDS contains valuable data that is used by municipalities and private firms to assist in grant applications, budgetary requests, and marketing plans.

The Region is positively impacted by the availability of the REDC CEDS, which brings together many different types of data and analysis. It is a unique tool that gives the Region an advantage in economic development and with securing funds. The communities, in turn, disseminate the data to the stakeholders.

In addition, the 2013 CEDS Update includes a comprehensive list of available technical and trade training programs available in and around the CEDS Region. This information is also posted in an easy-to-use format on our website. This information has been updated from the 2012 CEDS.

Marketing and Outreach of CEDS



To promote the use of the CEDS document by the region's economic development stakeholders as a resource in the region, as well as a "blueprint for success."



REDC went through a major format change for 2013 CEDS Update. In an attempt to make the CEDS a more user-friendly and widely-accessible document, we redesigned the format and layout to present a more marketable guide for our region.

Hard copies and/or electronic copies of the 2013 CEDS Update were mailed to each community within the CEDS region, the CEDS steering committee, the REDC Board of Directors, and state and federal funding agencies. In addition, we make the current CEDS, charts and graphs and several past CEDS available on the REDC website.

REDC promotes and makes available on its website any of the special reports generated from the CEDS such as "State of the Economy: 2013," as well as any reports we receive from the EDA.

In addition, REDC distributes printed materials on the CEDS process in our marketing material that is given to clients, commercial lenders and attendees at business expos and other economic development events.

Evaluation of CEDS Goals

Economic Development



To create high-skill, higher-wage jobs within innovative clusters as a means to diversify the regional economy and improve the economic conditions in the area.



REDC has aided in the creation and/or the retention of thousands of jobs through our Regional revolving loan fund. EDA funds have also been used for public works projects to create jobs within the Region. The Infrastructure Improvements

for the Smuttynose Brewery Expansion in Hampton were completed in the spring of 2013. This will allow for the relocation and expansion of the Smuttynose Brewery, which will retain and create over 25 new jobs.

REDC has assisted numerous regional businesses with technical assistance and financing which have lead to jobs in the manufacturing, service, and health care sectors.

Infrastructure Development



To invest in infrastructure improvements, such as roads, bridges, sewers, water facilities and broadband, and multi-modal transportation systems that will strengthen and diversify the regional economy.



Improved and expanded infrastructure leads to increased private investment and attention to environmental issues. For example, the Smuttynose Expansion project listed above is a sewer line infrastructure project that will allow for

the development of a currently vacant site. In addition, the Town of Seabrook started a project that will assist with the widening of the Route 107 Bridge over I-95 to accommodate future growth on Route 1, the commercial district of the town. This project is being funded in a large part by private commercial developers.

REDC continues to support the Pettengill Access Road project in Londonderry NH. This project, and subsequent development, will result in the creation of 4,000 – 6,000 new jobs. Although the application was not selected for EDA

funding in 2011, REDC and the town continue to partner together to help move this important project forward.

REDC encouraged the submission of new Priority Projects from towns that have previously indicated some degree of distress, and new infrastructure projects have been added to the Priority Project List each year. This year resulted in the addition of one new infrastructure project to the CEDS Priority Project list. This project is in the Town of Newmarket to upgrade an existing waterline along North Main Street to allow for commercial development of vacant and under-used properties.

The overall impact of this goal is to enhance the infrastructure in the region, which leads to increased economic development opportunities. Although many of these projects are funded through sources other than EDA, they provide direct benefits to the region in creating jobs and increasing the tax base for local communities.

Regional Cooperation



To develop cost-effective regional solutions to local problems as a means to improve municipal budgets and maintain the quality of life in the Region.



REDC supports regional cooperation through the study of sharing of key (and usually costly) municipal services. The most recent example of this is participation in discussions between Exeter and Stratham NH on water and wastewater sharing.

The region will be more successful if we can continue to encourage communities to work together on areas of common interest where efficiency can be found through partnerships. REDC encourages communities to work together to address common problems through a regional solution. RPC continues to host its Municipal Forums to encourage collaboration among local communities.

REDC has continued its work with officials throughout NH to strategize on municipal sharing with a particular focus on water/sewer services as this lack of infrastructure is a barrier to development. Representatives from numerous communities have shared their ideas on regionalism and shared services ranging from shared administrative staff to sharing emergency services. Regional infrastructure projects are necessary to limit the financial burden on individual communities and to encourage economic development and private investment.

Workforce Development



To leverage the resources available through the workforce development and university/community college systems to address the growing skill needs of the business community and regional workforce.



REDC was awarded an Economic Development Administration Public Works grant for the construction of a new business development and workforce training center in conjunction with its new offices in Raymond, NH.

REDC broke ground on this important project in the spring of 2013.

REDC matches workforce development needs of biotech, manufacturing and software development firms with workforce development agencies or educational institutions. We continuously work with the NH Department of Resources and Economic Development (DRED) to promote the NH Job Training Fund which can provide up to a 50% match for job training, promote the Economic Revitalization Tax Credits, Research & Development Tax Credits, and the REDC supports the Community College System of NH with their many programs, which are highlighted within the CEDS and include AMPED, WorkReady NH, and Running Start.

Workforce Housing



To develop diversified workforce housing options for all income levels to ensure the availability of workers for expanding businesses and new firms in the Region.



REDC assists and provides support with the development of a workforce housing plan for the State of NH through the New Hampshire Housing Finance Authority Consolidated Plan Committee of which Laurel Bistany, Executive Director of REDC, now sits.

REDC has focused upon the need for more workforce housing as an economic development issue. Firms that are relocating and/or expanding are finding it difficult to attract workers due to the limited affordable housing opportunities. The 2010 Census highlights that workforce housing continues to be a problem in this area, particularly on the seacoast. NH has a disproportionate amount of

expensive owner-occupied housing verses rental units.

In partnership with the City of Nashua REDC supported the creation of 109 new housing units in Nashua NH, through our Brownfields RLF fund. The remediation of the mills at Cotton Mill Square will lead to 56 units of low to moderate income housing in Downtown Nashua and fulfills several goals including Workforce Housing, Environmental Preservation, Regional Cooperation and Economic Development.

The Workforce Housing Coalition (WHC) is currently exploring development of workforce housing at the former Alrose Shoe Facility in Exeter NH in partnership with Rockingham Planning Commission and REDC. This important project was added to the 2011 CEDS Priority Project list.

Environmental Preservation



To maintain the unique qualities of life in southern New Hampshire through the preservation of natural and historic resources and a balanced approach to economic development.



REDC has been promoting our new Brownfields RLF throughout the Region as a means of ensuring a clean environment and in some cases promoting green space. REDC plans to focus upon "green" and marine industries as emerging technologies for the future. REDC continues to work extensively with the Brownfields Advisory Committee through the regional planning commissions. The preservation of open space and historic buildings maintains the quality of life in the region.

A long term environmental impact affecting our region is the Great Bay nitrogen problem, which has been a focus in the CEDS since last year. This multi-layered problem is complicated and has vast economic and environmental repercussions. We continue to work with local stakeholders to brainstorm ideas, like installing oyster beds in Great Bay, to reduce the current nitrogen in the Bay.

Evaluation of CEDS Projects



The goal of the Priority Project list is to identify significant economic development projects in the Region. The list is updated each year. Significant work has been done on several of the projects on the Project List over the past 12 months, and the Priority Project list has been a successful tool in obtaining funding for key projects. The Route 28 widening project in Derry and the Route 102 water line project in Raymond were both completed during the past twelve months.



Hampton's Smuttynose Brewery infrastructure improvement project is nearing completion, and at the time of writing this update is in the grant closeout stages. It is expected that the sewer line expansion will be completed by late spring, 2013.

REDC has secured funding for its new offices and a business development and training center in Raymond, NH. The EDA awarded REDC \$432,185 in Public Works and Economic Development funds to help complete this important regional project. Construction began in the spring of 2013.

In Derry, the Route 28 Water & Sewer Extension has secured funding and the Town opened bids in April 2013 for construction of the bridge replacement, water main replacement, new sewer main, drainage and road reconstruction.

In Nashua, a developer has completed a site plan for Phase I of the Bridge Street Waterfront Development Site (229 units of housing & 8200 sf commercial space); ground breaking expected Fall 2013. The City has finalized waste water plans for this area.

Raymond is making progress on its Exit 5 Master Plan due to the recent completion of installation of a water line along Route 102 and rezoning part of the this area. Interest to complete the Master Planning for the Route 5 area has gained momentum. In addition, Raymond is working with a developer who owns several parcels in the project area.

Evaluation of Short Term Actions

Continue “Grass Roots” Planning Process



During the past twelve months, REDC has met this action item by completing and filing the 2013 CEDS Update, holding four Steering Committee meetings throughout the planning cycle, updating the Priority Project list, completing the evaluation for the past 12-month cycle, and updating all available demographic data, to include adding newly obtained ACS data. We held a public CEDS meeting in May to present a report on the economic feasibility of a proposed intermodal transportation center. This report was completed by two University of NH interns.

Provide Support for Local Economic Development Efforts



The REDC successfully completed this action item by beginning the construction process for the new REDC Regional Business Development & Training Center; meeting with several key municipalities regarding potential Priority Projects in their community, continuing to work with the Brownfield's Advisory Committee, and continuing to reach out to all municipalities within our region to work on lending and project funding issues.

Provide Technical Assistance for Regional Economic Development Projects



REDC worked with a number of communities in its region to provide economic development advice and provide assistance when needed. REDC continued to work with the Town of Hudson on its Brownfield's grant, and is currently working with the City of Nashua on a new Brownfield loan. REDC reviewed, and approved, several loans in the past year which were made predominately to businesses in the service and manufacturing sectors and resulted in significant job creation. In 2012, REDC continued to work with the Town of Londonderry on the Pettengill infrastructure project. The town recently completed an economic viability assessment of the site and is actively pursuing end users for the site.

Evaluation Criteria for 2012-2013

The REDC staff and the CEDS Steering Committee will evaluate our performance based on:

- Goal attainment; did we make measurable progress in each of our six priority areas;
- Adherence to EDA policies and priorities;
- Submission of timely and complete reports;
- Progress towards completion of the 2013-2014 Short Term Action items listed in this CEDS;
- An active and engaged Steering Committee.

Coming soon... 2015 The Comprehensive Economic Development Strategy (CEDS) is a five-year plan with annual updates. REDC completed the current five-year plan in 2010, and this document is the 2013 Update. Next year in the Fall of 2014, REDC will start the planning process for our next five-year plan, which will be published in June 2015.

The CEDS process begins with creating a broad-based Steering Committee that represents the various businesses, industries and communities in our region. The committee helps guide the staff and provides input on the various aspects of the plan. One of the key features of the five-year plan is the development of the region's vision and goals. This is accomplished via a grass-roots visioning and planning effort that incorporates the committee, staff, and the citizens and business owners in our region. REDC establishes public forums and events where community members can identify the positive and negative attributes of, along with the potential difficulties to and opportunities for our region. This information is compiled and examined in the process to create the vision and goals.

For more information about the CEDS process, contact the CEDS Planner Jen Kimball at jennifer@redc.com.

Steering Committee

The first step in creating a successful Comprehensive Economic Development Strategy is to form a steering committee that is a broad-based representation of the major interests of the Region. Once again, REDC used the previous year's CEDS Steering Committee as a starting point to develop this year's committee. The committee accepted a resignation from Andre Garron of Londonderry, who moved to a new position with the University of New Hampshire, outside of the REDC region. The 2013 Steering Committee is listed on the facing page.

Consultants

Dennis Delay
Economic Consultant

116 Forest Street
Manchester, NH 03103
603-785-1129
delaydc@grolen.com

Kerrie Diers,
Executive Director, NRPC

Executive Park Drive, Suite 201
Merrimack, NH 03054-4058
603-424-2240 x12
kerried@nashuarpc.org

Peter Francese
Demographer

peter@francese.com
603-778-1779

Cliff Sinnott,
Executive Director, RPC

156 Water Street
Exeter, NH 03833
603-778-0885
csinnott@rpc-nh.org

Theresa Walker,
Consultant REDC

37 Industrial Drive, Suite F2
Exeter, NH 03833
603-772-2655
theresa@redc.com

Staff

Laurel Bistany
Executive Director REDC
laurel@redc.com

Jennifer Kimball
Planner REDC
jennifer@redc.com

Laura Harper
Administrative Assistant REDC
lharper@redc.com

Beth Johnson
Bookkeeper
beth@redc.com

Chris Duffy
Business Counselor
chris@redc.com

CEDS Steering Committee

Name	Representing	Name	Representing
David Bickford	Public Service on NH (PSNH), REDC Board	Barbara Kravitz	Rockingham Planning Commission
Nancy Carmer	City of Portsmouth	Robert McDonald	Sovereign Santander Bank
David Choate	Colliers International	Wes Moore	Moorecast, iPlayer HD
Thomas Conaton	Hampshire First Bank	Dan Poliquin	Dan Poliquin Welding & Fabrication (owner), Town of Plaistow
Glenn Coppelman	NH CDFA (Regional Dev. Coord.), Town of Kingston	Barry Sandberg	Exeter Development Commission (EDC)
Ernest Creveling	Town of Raymond	William Scott	Town of Salem
Thomas Galligani	City of Nashua	George Sioras	Town of Derry
Jeff Gowan	Town of Pelham	Lin Tamulonis	Great Bay Community College
Diane Hardy	Town of Newmarket	Scott Zeller	Exavera
Warren Henderson	Small Business Entrepreneur, President, REDC Board	Robert Zickell	MTI/Polyexe

CEDS Steering Committee Meetings

The 2012 CEDS Steering Committee met four times during the CEDS development process. A summary of the meetings is listed below.

Date	Meetings	Location	Agenda
11/7/2012	CEDS Steering Committee Meeting #1	Pelham - Pelham Town Offices	EDA grants and CEDS program. 2013 CEDS timeline and process. Granite State Future program presented by Jen Czysz, NRPC.
02/13/2013	CEDS Steering Committee Meeting #2 Tour of Newmarket Mills by Eric Chinburg	Newmarket - Chinburg Properties Tour & Newmarket Town Hall	Tour of mill redevelopment project by developer. 2013 Priority Project List. Regionally significant programs and projects.
05/1/2013	CEDS Steering Committee Meeting #3 Public Presentation: Measuring the Impacts of Additional Infrastructure in Intermodal Transportation	Hampton - Lane Memorial Library	UNH Interns present findings on economic analysis of the Hampton Intermodal Transportation Center Priority Project. Priority Project: YMCA, Exeter, NH. Approve 2013 Priority Project list. 2013 CEDS: new format.
06/26/2013	CEDS Steering Committee Meeting #4	Exeter - REDC	Review and approval of the 2013 CEDS update. Planning for the 2014 CEDS update.

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Table A-1: Population History and Current Population Estimates

Table A-1: Population History and Estimates													2013 CEDS Update					
Town/Area	US Census Population Counts										OEP Annual Population Estimates				change in population			
	1950	1960	1970	1980	1990	2000	2010	2009	2010	2011	2000-2010	% change	2010-2011	% change	OEP			
East Kingston	449	574	838	1,135	1,352	1,784	2,357	2,281	2,358	2,363	573	32%	5	0%				
Exeter	5,664	7,243	8,892	11,024	12,481	14,058	14,306	14,777	14,314	14,354	248	2%	40	0%				
Greenland	719	1,196	1,784	2,129	2,768	3,208	3,549	3,438	3,551	3,586	341	11%	35	1%				
Hampton	2,847	5,379	8,011	10,493	12,278	14,937	14,976	15,072	14,985	14,868	39	0%	-117	-1%				
Hampton Falls	629	885	1,254	1,372	1,503	1,880	2,236	2,102	2,237	2,235	356	19%	-2	0%				
Kensington	542	708	1,044	1,322	1,631	1,893	2,124	2,110	2,125	2,121	231	12%	-4	0%				
New Castle	583	823	975	936	840	1,010	968	1,023	969	967	-42	-4%	-2	0%				
Newfields	469	737	843	817	888	1,551	1,680	1,670	1,681	1,678	129	8%	-3	0%				
Newington	494	2,499	798	716	990	775	753	791	753	753	-22	-3%	0	0%				
Newmarket	2,709	3,153	3,361	4,290	7,157	8,027	8,936	9,276	8,941	8,950	909	11%	9	0%				
North Hampton	1,104	1,910	3,259	3,425	3,637	4,259	4,301	4,472	4,303	4,324	42	1%	21	0%				
Portsmouth	18,830	25,833	25,717	26,254	25,925	20,784	21,233	20,668	21,245	21,206	449	2%	-39	0%				
Rye	1,982	3,244	4,083	4,508	4,612	5,182	5,298	5,151	5,301	5,324	116	2%	23	0%				
Seabrook	1,788	2,209	3,053	5,917	6,503	7,934	8,693	8,373	8,698	8,697	759	10%	-1	0%				
South Hampton	314	443	558	660	740	844	814	891	814	813	-30	-4%	-1	0%				
Stratham	759	1,033	1,512	2,507	4,955	6,355	7,255	7,269	7,259	7,245	900	14%	-14	0%				
CEDS Eastern Towns	39,882	57,869	65,982	77,505	88,260	94,481	99,479	99,364	99,534	99,484	4,998	5%	-50	0%				
Atkinson	492	1,017	2,291	4,397	5,188	6,178	6,751	6,466	6,755	6,741	573	9%	-14	0%				
Auburn	1,158	1,292	2,035	2,883	4,085	4,682	4,953	5,110	4,956	4,974	271	6%	18	0%				
Brentwood	819	1,072	1,468	2,004	2,590	3,197	4,486	4,279	4,489	4,497	1,289	40%	8	0%				
Candia	1,243	1,490	1,997	2,989	3,557	3,911	3,909	4,112	3,911	3,913	-2	0%	2	0%				
Chester	807	1,053	1,382	2,006	2,691	3,792	4,768	4,624	4,771	4,762	976	26%	-9	0%				
Danville	508	605	924	1,318	2,534	4,023	4,387	4,438	4,389	4,424	364	9%	35	1%				
Deerfield	706	714	1,178	1,979	3,124	3,678	4,280	4,403	4,282	4,308	602	16%	26	1%				
Epping	1,796	2,006	2,356	3,460	5,162	5,476	6,411	6,256	6,415	6,501	935	17%	86	1%				
Fremont	698	783	993	1,333	2,576	3,510	4,283	4,200	4,285	4,316	773	22%	31	1%				
Hampstead	902	1,261	2,401	3,785	6,732	8,297	8,523	8,794	8,528	8,526	226	3%	-2	0%				
Kingston	1,283	708	2,882	4,111	5,591	5,862	6,025	6,163	6,028	6,010	163	3%	-18	0%				
Newton	1,173	1,419	1,920	3,068	3,473	4,289	4,603	4,589	4,606	4,661	314	7%	55	1%				
Northwood	966	1,034	1,525	2,175	3,124	3,640	4,241	4,136	4,243	4,235	601	17%	-8	0%				
Nottingham	566	623	952	1,952	2,939	3,701	4,785	4,540	4,788	4,813	1,084	29%	25	1%				
Plaistow	2,082	2,915	4,712	5,609	7,316	7,747	7,609	7,629	7,613	7,584	-138	-2%	-29	0%				
Raymond	1,428	1,867	3,003	5,453	8,713	9,674	10,138	10,950	10,145	10,185	464	5%	40	0%				
Sandown	315	366	741	2,057	4,060	5,143	5,986	6,001	5,989	6,076	843	16%	87	1%				
CEDS Central Towns	16,942	20,225	32,760	50,579	73,455	88,600	96,138	96,690	96,193	96,526	9,338	11%	333	0%				
Derry	5,826	6,987	11,712	18,875	29,603	34,021	33,109	34,318	33,129	33,008	-912	-3%	-121	0%				
Hudson	4,183	5,876	10,638	14,022	19,530	22,928	24,467	24,712	24,481	24,514	1,539	7%	33	0%				
Litchfield	427	721	1,420	4,150	5,516	7,360	8,271	8,528	8,276	8,275	911	12%	-1	0%				
Londonderry	1,640	2,457	5,346	13,598	19,781	23,236	24,129	24,729	24,144	24,132	893	4%	-12	0%				
Merrimack	1,908	2,989	8,595	15,406	22,156	25,119	25,494	26,278	25,508	25,454	375	1%	-54	0%				
Nashua	34,669	39,096	55,820	67,865	79,662	86,605	86,494	87,566	86,543	86,366	-111	0%	-177	0%				
Pelham	1,317	2,605	5,408	8,090	9,408	10,914	12,897	12,550	12,904	12,894	1,983	18%	-10	0%				
Salem	4,805	9,210	20,142	24,124	25,746	28,112	28,776	29,640	28,793	28,702	664	2%	-91	0%				
Windham	964	1,317	3,008	5,664	9,000	10,709	13,592	12,993	13,600	13,756	2,883	27%	156	1%				
CEDS Western Towns	55,739	71,258	122,089	171,794	220,402	249,004	257,229	261,314	257,378	257,101	8,225	3%	-277	0%				
RRDC Region	11,2563	14,9352	22,0831	29,9878	38,2117	43,0285	45,2846	45,7368	45,3105	45,3111	22,561	5%	6	0%				
Hillsborough County	156,987	178,161	223,941	276,608	336,073	380,841	400,721	403,288	400,950	400,797	19,880	5%	-153	0%				
Rockingham County	70,059	98,065	138,950	190,345	245,845	277,359	295,223	297,734	295,123	295,608	17,864	6%	485	0%				
New Hampshire	529,880	606,787	737,681	920,475	1,109,252	1,235,550	1,316,470	1,324,575	1,317,208	1,318,000	80,920	7%	792	0%				

Data Sources: US Census and NH Office of Energy and Planning

Table B-1: Housing Units – Census Counts and Housing Estimates

TOWN/AREA	Housing Units (US Census counts)			Avg. Annual Growth Rate		ACS Housing Estimates					
	1990	2000	2010	'90-'00	'00-'10	Housing Counts		number occupied		number vacant	
						2010	2011	2010	2011	2010	2011
East Kingston	494	648	907	2.8%	3.4%	893	901	859	870	34	31
Exeter	5,346	6,107	6,496	1.3%	0.6%	6,759	6,527	6,305	6,182	454	345
Greenland	1,082	1,244	1,443	1.4%	1.5%	1,313	1,375	1,290	1,355	23	20
Hampton	8,599	9,349	9,921	0.8%	0.6%	9,708	9,652	7,065	6,922	2,643	2,730
Hampton Falls	591	729	900	2.1%	2.1%	867	878	829	835	38	43
Kensington	585	672	806	1.4%	1.8%	799	794	775	741	24	53
New Castle	399	488	537	2.0%	1.0%	482	508	408	428	74	80
Newfields	324	532	591	5.1%	1.1%	589	603	578	594	11	9
Newington	320	305	322	-0.5%	0.5%	326	305	302	283	24	22
Newmarket	3,285	3,457	4,139	0.5%	1.8%	4,009	3,890	3,763	3,688	246	202
North Hampton	1,495	1,782	1,914	1.8%	0.7%	1,815	1,890	1,714	1,764	101	126
Portsmouth	11,369	10,186	10,625	-1.1%	0.4%	10,647	10,757	9,927	9,992	720	765
Rye	2,443	2,645	2,852	0.8%	0.8%	2,856	2,811	2,339	2,299	517	512
Seabrook	3,469	4,066	4,544	1.6%	1.1%	4,640	4,693	3,976	3,905	664	788
South Hampton	263	308	504	1.6%	5.0%	329	365	305	289	24	76
Stratham	1,917	2,371	2,864	2.1%	1.9%	2,784	2,777	2,636	2,673	148	104
CEDS Eastern Towns	41,981	44,889	49,365	0.7%	1.0%	48,816	48,726	43,071	42,820	5,745	5,906
Atkinson	1,885	2,431	2,788	2.6%	1.4%	2,746	2,813	2,634	2,642	112	171
Auburn	1,354	1,622	1,814	1.8%	1.1%	1,841	1,863	1,695	1,705	146	158
Brentwood	778	920	1,350	1.7%	3.9%	1,186	1,217	1,186	1,217	0	0
Candia	1,192	1,384	1,494	1.5%	0.8%	1,505	1,482	1,505	1,448	0	34
Chester	924	1,247	1,596	3.0%	2.5%	1,624	1,621	1,573	1,551	51	70
Danville	960	1,479	1,684	4.4%	1.3%	1,582	1,637	1,460	1,545	122	92
Deerfield	1,227	1,406	1,743	1.4%	2.2%	1,631	1,682	1,448	1,487	183	195
Epping	2,059	2,215	2,723	0.7%	2.1%	2,808	2,889	2,450	2,487	358	402
Fremont	920	1,201	1,573	2.7%	2.7%	1,599	1,581	1,514	1,486	85	95
Hampstead	2,661	3,276	3,727	2.1%	1.3%	3,568	3,650	3,261	3,387	307	263
Kingston	2,115	2,265	2,480	0.7%	0.9%	2,375	2,419	2,243	2,281	132	138
Newton	1,251	1,552	1,751	2.2%	1.2%	1,840	1,708	1,763	1,679	77	29
Northwood	1,791	1,905	2,129	0.6%	1.1%	2,139	2,209	1,694	1,753	445	456
Nottingham	1,314	1,592	1,986	1.9%	2.2%	1,941	2,039	1,684	1,750	257	289
Plaistow	2,691	2,927	3,016	0.8%	0.3%	3,047	3,195	2,940	3,016	107	179
Raymond	3,350	3,710	4,254	1.0%	1.4%	4,297	4,185	4,014	3,893	283	292
Sandown	1,488	1,777	2,214	1.8%	2.2%	1,981	1,924	1,955	1,924	26	0
CEDS Central Towns	27,960	32,909	38,322	1.6%	1.5%	37,710	38,114	35,019	35,251	2,691	2,863
Derry	11,869	12,735	13,277	0.7%	0.4%	13,244	13,481	12,542	12,773	702	708
Hudson	6,902	8,165	9,212	1.7%	1.2%	8,998	9,064	8,718	8,808	280	256
Litchfield	1,845	2,389	2,912	2.6%	2.0%	2,744	2,873	2,668	2,730	76	143
Londonderry	6,739	7,718	8,771	1.4%	1.3%	8,677	8,846	8,374	8,507	303	339
Merrimack	7,915	8,959	9,818	1.2%	0.9%	9,907	9,754	9,471	9,421	436	333
Nashua	33,383	35,387	37,168	0.6%	0.5%	37,142	37,422	35,114	35,220	2,028	2,202
Pelham	3,118	3,740	4,598	1.8%	2.1%	4,340	4,364	4,263	4,275	77	89
Salem	9,897	10,866	11,810	0.9%	0.8%	12,056	11,984	11,202	11,194	854	790
Windham	3,327	3,906	5,164	1.6%	2.8%	4,907	4,989	4,514	4,560	393	429
CEDS Western Towns	84,995	93,865	102,730	1.0%	0.9%	102,015	102,777	96,866	97,488	5,149	5,289
REDC CEDS Region	154,936	171,663	190,417	1.0%	1.0%	188,541	189,617	174,956	175,559	13,585	14,058
Hillsborough County	135,622	149,961	166,053	1.0%	1.0%	164,603	165,465	153,120	153,471	11,483	11,994
Rockingham County	101,773	113,023	126,709	1.1%	1.1%	125,410	126,140	114,722	115,105	10,688	11,035
State of NH	503,541	546,524	614,754	0.8%	1.2%	607,758	611,916	513,804	514,869	93,954	97,047

Source: U.S. Census

Source: Starting in 2010, the housing count estimates are from the American Community Survey.

Table B-4: Housing Purchase Prices – NH Counties

All Homes									
	Change from 2007-2012	2007	2008	2009	2010	2011	2012 *	change from 2011 to 2012	Percent change from 2011 to 2012
Hillsborough County	-21%	\$265,000	\$244,900	\$218,500	\$224,900	\$210,533	\$209,900	-\$633	0%
Rockingham County	-15%	\$300,000	\$285,000	\$247,000	\$259,000	\$250,000	\$255,000	\$5,000	2%
Belknap County	-22%	\$219,000	\$215,000	\$170,000	\$175,000	\$170,000	\$170,000	\$0	0%
Carroll County	-23%	\$219,900	\$210,000	\$170,000	\$180,000	\$173,000	\$169,000	-\$4,000	-2%
Cheshire County	-20%	\$205,000	\$192,500	\$169,900	\$166,000	\$159,000	\$164,500	\$5,500	3%
Coos County	-23%	\$127,533	\$115,000	\$80,000	\$95,000	\$90,000	\$98,000	\$8,000	9%
Grafton County	-16%	\$221,000	\$212,500	\$182,000	\$185,000	\$189,425	\$185,000	-\$4,425	-2%
Merrimack County	-22%	\$238,000	\$232,000	\$199,900	\$195,000	\$182,000	\$185,000	\$3,000	2%
Strafford County	-20%	\$235,000	\$225,500	\$194,933	\$195,000	\$186,000	\$187,900	\$1,900	1%
Sullivan County	-17%	\$190,000	\$185,000	\$149,000	\$153,000	\$149,900	\$158,500	\$8,600	6%
New Hampshire Statewide	-19%	\$252,500	\$240,000	\$210,000	\$215,000	\$207,000	\$205,000	-\$2,000	-1%

Existing Homes									
	Change from 2007-2012	2007	2008	2009	2010	2011	2012 *	change from 2011 to 2012	Percent change from 2011 to 2012
Hillsborough County	-20%	\$255,000	\$234,900	\$212,500	\$217,500	\$206,000	\$203,000	-\$3,000	-1%
Rockingham County	-15%	\$290,000	\$275,000	\$240,000	\$250,000	\$245,000	\$247,900	\$2,900	1%
Belknap County	-19%	\$210,000	\$210,000	\$165,000	\$173,700	\$166,000	\$170,000	\$4,000	2%
Carroll County	-23%	\$217,500	\$201,000	\$167,533	\$180,000	\$170,500	\$167,500	-\$3,000	-2%
Cheshire County	-21%	\$205,000	\$190,000	\$167,000	\$162,500	\$156,900	\$161,000	\$4,100	3%
Coos County	-22%	\$125,000	\$115,000	\$79,500	\$94,500	\$90,000	\$98,000	\$8,000	9%
Grafton County	-18%	\$220,000	\$208,500	\$174,000	\$183,500	\$185,000	\$180,000	-\$5,000	-3%
Merrimack County	-21%	\$230,000	\$225,900	\$195,000	\$189,000	\$175,000	\$182,600	\$7,600	4%
Strafford County	-23%	\$229,000	\$216,000	\$185,000	\$184,500	\$180,000	\$177,000	-\$3,000	-2%
Sullivan County	-18%	\$189,000	\$184,500	\$145,900	\$153,000	\$147,000	\$155,000	\$8,000	5%
New Hampshire Statewide	-19%	\$245,000	\$231,900	\$200,000	\$205,000	\$200,000	\$199,000	-\$1,000	-1%

New Homes									
	Change from 2007-2012	2007	2008	2009	2010	2011	2012 *	change from 2011 to 2012	Percent change from 2011 to 2012
Hillsborough County	-13%	\$322,400	\$325,000	\$296,333	\$285,000	\$300,000	\$281,594	-\$18,406	-6%
Rockingham County	-11%	\$338,000	\$336,670	\$285,000	\$294,561	\$284,318	\$299,933	\$15,615	5%
Belknap County	n/a	\$259,900	\$250,000	\$236,560	\$205,500	\$223,000	n/a	n/a	n/a
Carroll County	n/a	\$224,900	\$231,500	\$245,000	\$197,000	\$260,000	n/a	n/a	n/a
Cheshire County	n/a	\$219,900	\$199,933	\$189,900	\$185,000	\$175,000	n/a	n/a	n/a
Coos County	n/a	\$190,000	\$150,000	\$248,000	\$325,000	\$0	n/a	n/a	n/a
Grafton County	n/a	\$240,000	\$230,000	\$250,000	\$219,000	\$234,700	n/a	n/a	n/a
Merrimack County	-13%	\$275,110	\$275,700	\$257,500	\$257,000	\$249,900	\$239,061	-\$10,839	-4%
Strafford County	10%	\$262,400	\$259,900	\$234,600	\$249,900	\$249,900	\$289,900	\$40,000	16%
Sullivan County	n/a	\$252,000	\$216,574	\$206,000	\$150,000	\$160,000	n/a	n/a	n/a
New Hampshire Statewide	-7%	\$300,000	\$295,000	\$270,000	\$270,900	\$267,500	\$280,000	\$12,500	5%

* The values listed for 2012 are the preliminary values for Jan. through Oct. 2012. These numbers may be adjusted slightly once final sales are reported.

Source: NHHFA Purchase Price Database

Table B-5: Home Sales Data, REDC CEDS Region

Town/Area	2012 All Home Sales *		2012 Existing Home Sales*		2012 New Home Sales *		Med. Sales Price Change 11 to 12		
	Med Sales Price	Sample Size	Med Sales Price	Sample Size	Med Sales Price	Sample Size	All Sales	Existing	New
East Kingston	\$275,000	31	\$239,000	28	\$279,000	3	-6.0%	-17.6%	-17.9%
Exeter	\$252,000	191	\$242,000	152	\$286,650	39	-3.8%	-6.9%	4.2%
Greenland	\$360,000	48	\$349,000	32	\$407,000	16	0.0%	-3.1%	18.8%
Hampton	\$284,000	202	\$275,000	190	\$358,365	13	1.6%	0.0%	-1.5%
Hampton Falls	\$385,000	29	\$348,500	26	\$399,900	3	26.2%	14.3%	n/a
Kensington	\$375,000	16	\$375,000	16	n/a	n/a	31.6%	31.6%	n/a
New Castle	\$972,500	21	\$972,500	20	\$700,000	1	-11.6%	-11.6%	n/a
Newfields	\$395,000	19	\$395,000	19	n/a	n/a	54.9%	54.9%	n/a
Newington	\$530,000	3	\$530,000	3	n/a	n/a	32.5%	32.5%	n/a
Newmarket	\$239,900	86	\$235,000	81	\$256,000	5	9.0%	7.7%	-3.9%
North Hampton	\$405,000	44	\$390,000	38	\$449,000	6	1.3%	1.3%	2.4%
Portsmouth	\$340,000	255	\$320,550	225	\$395,660	30	9.7%	3.4%	1.5%
Rye	\$512,500	64	\$512,500	61	\$650,000	3	3.5%	3.5%	-27.8%
Seabrook	\$265,000	59	\$238,000	48	\$388,385	11	6.0%	0.0%	2.2%
South Hampton	\$520,000	3	\$520,000	3	n/a	n/a	73.4%	73.4%	n/a
Stratham	\$322,000	118	\$320,000	106	\$343,478	12	10.3%	24.3%	-10.8%
CEDS Eastern Towns	\$328,957	1189	\$319,318	1048	\$361,088	142	3%	1%	3%
Atkinson	\$260,000	58	\$260,000	54	\$229,900	4	9.7%	9.7%	4.7%
Auburn	\$347,750	59	\$300,000	39	\$393,990	20	10.4%	15.4%	-3.9%
Brentwood	\$325,000	68	\$333,000	41	\$299,759	27	-1.5%	0.9%	5.5%
Candia	\$212,500	35	\$212,500	34	\$159,900	1	-19.8%	-17.9%	-46.7%
Chester	\$267,000	63	\$360,000	50	\$349,900	13	-0.7%	27.2%	37.2%
Danville	\$190,000	27	\$190,000	23	\$204,500	4	-20.8%	-9.6%	-31.8%
Deerfield	\$222,400	37	\$220,000	36	\$238,000	1	-1.1%	4.0%	1.7%
Epping	\$230,000	83	\$199,900	62	\$245,600	21	0.0%	5.8%	-4.2%
Fremont	\$193,000	48	\$193,000	39	\$195,895	9	-5.4%	2.9%	-4.0%
Hampstead	\$249,933	70	\$249,900	63	\$270,000	7	0.0%	0.0%	-5.9%
Kingston	\$216,200	67	\$202,000	58	\$259,900	9	10.9%	10.1%	13.0%
Newton	\$247,900	56	\$245,000	42	\$247,933	14	7.1%	16.7%	-0.2%
Northwood	\$155,000	31	\$149,000	27	\$186,550	4	-18.4%	-18.6%	-21.9%
Nottingham	\$238,000	41	\$229,000	36	\$267,700	5	1.3%	3.2%	7.1%
Plaistow	\$205,000	59	\$205,000	58	\$159,900	1	-1.4%	-1.4%	-15.8%
Raymond	\$179,000	104	\$175,500	93	\$214,900	11	-17.9%	-12.3%	-4.4%
Sandown	\$229,900	74	\$215,000	54	\$279,933	20	-3.8%	7.6%	2.5%
CEDS Central Towns	\$236,549	980	\$230,738	809	\$277,693	171	-1%	3%	5%
Derry	\$197,000	303	\$195,000	276	\$250,000	27	7.1%	8.3%	-5.7%
Hudson	\$222,000	214	\$220,000	195	\$299,950	19	-1.3%	2.3%	-6.2%
Litchfield	\$235,000	83	\$215,000	66	\$283,000	17	-3.3%	-6.5%	12.1%
Londonderry	\$235,000	233	\$220,000	207	\$329,900	26	2.2%	0.9%	22.2%
Merrimack	\$208,500	347	\$202,500	337	\$279,900	10	-2.6%	-3.6%	-12.1%
Nashua	\$193,333	676	\$190,000	633	\$287,000	43	-7.9%	-7.3%	-8.6%
Pelham	\$285,000	111	\$274,900	91	\$330,000	20	8.7%	1.8%	32.0%
Salem	\$238,000	226	\$229,300	203	\$305,000	23	-0.8%	-3.7%	-6.2%
Windham	\$360,000	187	\$359,900	157	\$382,333	30	0.0%	7.4%	-12.7%
CEDS Western Towns	\$225,733	2380	\$218,490	2165	\$307,267	215	-2%	-2%	-3%
REDC CEDS Region	\$255,043	4549	\$247,226	4022	\$312,164	528	1%	1%	4%
Hillsborough County	\$209,900	3633	\$203,000	3374	\$281,594	259	0%	-1%	-6%
Rockingham County	\$255,000	3118	\$247,900	2700	\$299,933	418	2%	1%	5%
New Hampshire	\$205,000	11693	\$199,000	10790	\$280,000	903	-1%	-1%	5%

Source: NH Housing Finance Authority Purchase Price Database; CEDS Subregion Sales Prices based on weighted averages

NOTE: Calculations based on sample sizes less than 50 are considered highly volatile.

* The values listed for 2012 are the preliminary year end values. These numbers may be adjusted slightly once final sales are reported.

Table B-7: Foreclosure Data

Town/Area	Number of Foreclosures				Year-to-Year Change			% Year to Year Change		
	2009	2010	2011	2012	2009-2010	2010-2011	2011-2012	2009-2010	2010-2011	2011-2012
East Kingston	7	8	2	3	1	-6	1	14%	-75%	50%
Exeter	21	25	34	29	4	9	-5	19%	36%	-15%
Greenland	6	6	3	4	0	-3	1	0%	-50%	33%
Hampton	32	46	32	25	14	-14	-7	44%	-30%	-22%
Hampton Falls	3	3	4	4	0	1	0	0%	33%	0%
Kensington	3	8	3	5	5	-5	2	167%	-63%	67%
New Castle	0	0	0	0	0	0	0	0%	0%	0%
Newfields	1	0	0	2	-1	0	2	-100%	0%	100%
Newington	1	2	0	0	1	-2	0	100%	-100%	0%
Newmarket	15	27	17	17	12	-10	0	80%	-37%	0%
North Hampton	10	8	5	10	-2	-3	5	-20%	-38%	100%
Portsmouth	18	17	17	16	-1	0	-1	-6%	0%	-6%
Rye	5	4	6	2	-1	2	-4	-20%	50%	-67%
Seabrook	20	19	20	16	-1	1	-4	-5%	5%	-20%
South Hampton	2	0	1	3	-2	1	2	-100%	100%	200%
Stratham	12	8	8	12	-4	0	4	-33%	0%	50%
CEDS Eastern Towns	156	181	152	148	25	-29	-4	16%	-16%	-3%
Atkinson	11	14	9	7	3	-5	-2	27%	-36%	-22%
Auburn	7	10	10	11	3	0	1	43%	0%	10%
Brentwood	11	12	8	8	1	-4	0	9%	-33%	0%
Candia	10	10	8	6	0	-2	-2	0%	-20%	-25%
Chester	9	14	8	15	5	-6	7	56%	-43%	88%
Danville	11	13	9	18	2	-4	9	18%	-31%	100%
Deerfield	16	21	13	12	5	-8	-1	31%	-38%	-8%
Epping	16	29	17	22	13	-12	5	81%	-41%	29%
Fremont	15	17	17	16	2	0	-1	13%	0%	-6%
Hampstead	9	19	19	25	10	0	6	111%	0%	32%
Kingston	15	17	22	17	2	5	-5	13%	29%	-23%
Newton	14	23	10	16	9	-13	6	64%	-57%	60%
Northwood	24	19	20	18	-5	1	-2	-21%	5%	-10%
Nottingham	13	18	12	16	5	-6	4	38%	-33%	33%
Plaistow	17	27	25	23	10	-2	-2	59%	-7%	-8%
Raymond	51	51	43	37	0	-8	-6	0%	-16%	-14%
Sandown	29	29	23	19	0	-6	-4	0%	-21%	-17%
CEDS Central Towns	278	343	273	286	65	-70	13	23%	-20%	5%
Derry	112	122	106	130	10	-16	24	9%	-13%	23%
Hudson	70	73	37	26	3	-36	-11	4%	-49%	-30%
Litchfield	15	14	9	23	-1	-5	14	-7%	-36%	156%
Londonderry	51	82	69	50	31	-13	-19	61%	-16%	-28%
Merrimack	82	79	63	87	-3	-16	24	-4%	-20%	38%
Nashua	190	225	166	204	35	-59	38	18%	-26%	23%
Pelham	21	28	24	23	7	-4	-1	33%	-14%	-4%
Salem	65	69	65	79	4	-4	14	6%	-6%	22%
Windham	24	23	17	15	-1	-6	-2	-4%	-26%	-12%
CEDS Western Towns	630	715	556	637	85	-159	81	13%	-22%	15%
REDC CEDS Region	1064	1239	981	1071	175	-258		16%	-21%	0%
Hillsborough County	1044	1172	933	1078	128	-239	145	12%	-20%	16%
Rockingham County	686	820	680	710	134	-140	30	20%	-17%	4%
New Hampshire	3467	3953	3146	3768	486	-807	622	14%	-20%	20%

Source: Real Data (www.real-data.com)

Table C-2: Employment and Wages for Hillsborough County

NAICS Code	Industry	Hillsborough County 2009			Hillsborough County 2010			Hillsborough County 2011		
		Units	Average Annual Empl.	Average Weekly Wage	Units	Average Annual Empl.	Average Weekly Wage	Units	Average Annual Empl.	Average Weekly Wage
ALL	Total, Private plus Government	11,121	187,240	\$959.30	11,063	184,628	\$980.99	11,094	186,437	\$1,014.00
	Total Private	10,842	165,260	\$962.96	10,780	162,829	\$986.25	10,813	165,030	\$1,019.00
101	Goods Producing	1,639	33,003	\$1,236.24	1,586	32,117	\$1,287.91	1,569	32,694	\$1,330.00
11	Agriculture, Forestry, Fishing and Hunting	34	182	\$527.70	29	155	\$552.39	24	136	\$585.00
111	Crop Production	13	79	\$309.95	11	75	\$316.50	10	71	\$308.00
112	Animal Production	5	14	\$604.64	3	10	\$679.69	n	n	n
113	Forestry and Logging	11	57	\$752.75	11	54	\$801.85	10	50	\$856.00
114	Fishing, Hunting, and Trapping	0	0	\$0.00	0	0	\$0.00	0	0	\$0.00
115	Agriculture and Forestry support Activities	6	32	\$636.25	5	17	\$730.62	n	n	n
21	Mining	9	37	\$1,367.42	7	32	\$1,464.75	7	38	\$1,267.00
211	Oil and Gas Extraction	0	0	\$0.00	0	0	\$0.00	0	0	\$0.00
212	Mining, except Oil and Gas	9	37	\$1,367.42	7	32	\$1,464.75	7	38	\$1,267.00
213	Support Activities for Mining	0	0	\$0.00	0	0	\$0.00	0	0	\$0.00
23	Construction	940	6,141	\$1,009.28	917	5,843	\$1,016.61	913	6,194	\$1,004.00
236	Construction of Buildings	250	1,358	\$1,018.54	238	1,305	\$1,079.53	232	1,363	\$1,068.00
237	Heavy and Civil Engineering Construction	22	303	\$1,078.48	19	290	\$1,088.09	24	132	\$1,053.00
238	Specialty Trade Contractors	668	4,479	\$1,001.78	660	4,248	\$992.41	657	4,519	\$981.00
31-33	Manufacturing	656	26,644	\$1,293.20	633	26,088	\$1,352.83	625	26,327	\$1,410.00
311	Food Manufacturing	26	449	\$623.32	23	433	\$654.17	25	409	\$684.00
312	Beverage and Tobacco Product Manufacturing	n	n	n	5	346	\$1,480.32	5	328	\$1,514.00
313	Textile Mills	10	529	\$929.48	10	538	\$976.33	9	557	\$1,044.00
314	Textile Product Mills	10	79	\$572.68	9	73	\$658.60	10	83	\$658.00
315	Apparel Manufacturing	3	39	\$878.27	3	42	\$912.87	848	45	\$991.00
316	Leather and Allied Product Manufacturing	n	n	n	n	n	n	n	n	n
321	Wood Product Manufacturing	13	131	\$813.55	13	128	\$801.96	12	145	\$848.00
322	Paper Manufacturing	10	881	\$905.24	10	822	\$963.91	9	744	\$1,016.00
323	Printing and Related Support Activities	64	784	\$866.57	59	638	\$837.80	56	627	\$856.00
324	Petroleum and Coal Products Manufacturing	n	n	n	n	n	n	n	n	n
325	Chemical Manufacturing	21	447	\$1,193.03	20	418	\$1,211.38	17	413	\$1,126.00
326	Plastics and Rubber Products Manufacturing	37	1,979	\$911.13	37	2,080	\$990.13	38	2,028	\$1,006.00
327	Nonmetallic Mineral Product Manufacturing	24	422	\$1,028.17	22	408	\$1,063.43	20	437	\$960.00
331	Primary Metal Manufacturing	12	965	\$1,001.22	11	1,030	\$1,026.04	11	1,164	\$989.00
332	Fabricated Metal Product Manufacturing	117	2,855	\$964.66	115	2,956	\$1,062.35	116	3,055	\$1,045.00
333	Machinery Manufacturing	50	1,302	\$1,448.27	48	1,345	\$1,515.78	50	1,295	\$1,876.00
334	Computer and Electronic Product Manufacturing	144	11,370	\$1,643.57	144	11,083	\$1,698.37	143	11,237	\$1,749.00
335	Electrical Equipment and Appliances Manufacturing	23	1,770	\$1,210.78	21	1,621	\$1,320.04	19	1,564	\$1,312.00
336	Transportation Equipment Manufacturing	9	337	\$1,110.94	8	223	\$1,004.49	9	228	\$1,048.00
337	Furniture and Related Product Manufacturing	17	102	\$680.58	16	87	\$699.40	15	85	\$707.00
339	Miscellaneous Manufacturing	58	1,760	\$1,001.46	55	1,798	\$1,090.96	54	1,880	\$1,362.00
102	Service Providing	9,203	132,257	\$894.76	9,194	130,712	\$912.12	9,244	132,336	\$942.00
22	Utilities	18	379	\$1,439.61	17	379	\$1,554.50	16	367	\$1,662.00
221	Utilities	18	379	\$1,439.61	17	379	\$1,554.50	16	367	\$1,662.00
42	Wholesale Trade	995	7,469	\$1,346.27	990	7,299	\$1,433.89	953	7,187	\$1,521.00
423	Merchant Wholesalers, Durable Goods	310	4,397	\$1,329.40	311	4,249	\$1,436.62	302	4,152	\$1,522.00
424	Merchant Wholesalers, Nondurable Goods	85	1,355	\$904.30	87	1,342	\$931.23	89	1,293	\$1,000.00
425	Electronic Markets and Agents and Brokers	600	1,718	\$1,738.14	593	1,708	\$1,821.92	563	1,742	\$1,905.00
44-45	Retail Trade	1,441	26,577	\$554.13	1,426	26,298	\$566.91	1,429	26,513	\$586.00
441	Motor Vehicle and Parts Dealers	169	3,359	\$892.81	166	3,386	\$923.83	165	3,502	\$946.00
442	Furniture and Home Furnishings Stores	76	698	\$617.26	74	740	\$599.51	68	755	\$606.00
443	Electronics and Appliance Stores	98	1,430	\$1,285.08	102	1,581	\$1,314.25	103	1,709	\$1,363.00
444	Building Material and Garden Supply Stores	110	2,129	\$634.05	109	2,137	\$644.63	133	2,125	\$655.00
445	Food and Beverage Stores	155	6,240	\$344.17	149	5,813	\$343.35	154	5,752	\$344.00
446	Health and Personal Care Stores	111	1,288	\$552.40	106	1,232	\$525.84	117	1,295	\$556.00
447	Gasoline Stations	140	935	\$391.76	135	917	\$396.27	113	899	\$396.00
448	Clothing and Clothing Accessories Stores	176	2,381	\$323.87	169	2,440	\$320.02	160	2,099	\$337.00
451	Sporting Goods, Hobby, Book, and Music Stores	119	1,495	\$351.67	120	1,449	\$373.60	112	1,420	\$383.00
452	General Merchandise Stores	45	3,845	\$408.69	46	3,790	\$414.93	53	4,085	\$403.00
453	Miscellaneous Store Retailers	178	1,467	\$426.72	184	1,649	\$418.36	184	1,660	\$414.00
454	Nonstore Retailers	64	1,309	\$1,061.32	66	1,165	\$1,107.87	69	1,213	\$1,152.00
48-49	Transportation and Warehousing	218	3,928	\$711.84	210	3,772	\$740.03	211	3,820	\$782.00
481	Air Transportation	20	409	\$848.89	18	322	\$963.79	19	316	\$1,065.00
484	Truck Transportation	76	789	\$782.90	72	795	\$728.13	76	827	\$796.00
485	Transit and Ground Passenger Transportation	35	832	\$385.13	32	742	\$371.69	31	699	\$383.00
486	Pipeline Transportation	0	0	\$0.00	0	0	\$0.00	n	n	n
487	Scenic and Sightseeing Transportation	n	n	n	n	n	n	n	n	n
488	Support Activities for Transportation	n	n	n	n	n	n	n	n	n
491	Postal Service	n	n	n	n	n	n	n	n	n
492	Couriers and Messengers	n	n	n	n	n	n	n	n	n
493	Warehousing and Storage	21	807	\$849.48	21	826	\$890.64	21	826	\$896.00

Source: NH Economic and Labor Market Information Bureau

Table C-2: Employment and Wages for Hillsborough County (continued)

NAICS Code	Industry	Hillsborough County 2009			Hillsborough County 2010			Hillsborough County 2011		
		Units	Average Annual Empl.	Average Weekly Wage	Units	Average Annual Empl.	Average Weekly Wage	Units	Average Annual Empl.	Average Weekly Wage
51	Information	222	5,748	\$1,580.81	211	5,179	\$1,733.61	202	5,204	\$1,621.00
511	Publishing Industries (except Internet)	95	2,876	\$1,880.63	89	2,567	\$2,099.18	83	2,500	\$1,819.00
512	Motion Picture and Sound Recording	9	343	\$522.78	8	201	\$913.35	9	212	\$914.00
515	Broadcasting, except Internet	9	218	\$1,146.48	8	210	\$1,100.44	7	211	\$1,128.00
517	Telecommunications	57	2,018	\$1,429.05	51	1,889	\$1,457.12	46	1,940	\$1,538.00
518	Data Processing and Related Services	28	192	\$1,209.01	28	195	\$1,236.86	30	218	\$1,242.00
519	Other Information Services	25	100	\$1,308.82	29	117	\$1,554.34	27	124	\$1,644.00
52	Finance and Insurance	636	9,775	\$1,681.82	612	9,291	\$1,818.58	613	9,393	\$1,941.00
522	Credit Intermediation and Related Activities	224	2,265	\$1,106.01	199	2,152	\$1,152.08	197	2,141	\$1,118.00
523	Financial Investment and Related Activities	142	4,394	\$2,041.74	146	4,257	\$2,354.89	150	4,452	\$2,540.00
524	Insurance Carriers and Related Activities	263	2,991	\$1,595.57	257	2,756	\$1,521.64	255	6,278	\$1,612.00
525	Funds, Trusts, and Other Financial Vehicles	8	126	\$1,529.75	10	125	\$1,577.99	11	122	\$1,739.00
53	Real Estate and Rental and Leasing	377	2,445	\$1,041.18	370	2,307	\$779.11	358	2,316	\$1,054.00
531	Real Estate	300	1,750	\$1,175.69	298	1,717	\$790.43	294	1,758	\$1,121.00
532	Rental and Leasing Services	n	n	n	n	n	n	62	549	\$840.00
533	Lessors of Nonfinancial Intangible Assets	n	n	n	n	n	n	3	8	\$903.00
54	Professional and Technical Services	1,402	11,924	\$1,547.86	1,409	11,421	\$1,560.17	1,414	11,599	\$1,603.00
541	Professional and Technical Services	1,602	11,924	\$1,547.86	1,409	11,421	\$1,560.17	1,414	11,599	\$1,603.00
5411	Legal Services	258	1,763	\$1,521.50	254	1,727	\$1,553.90	254	1,705	\$1,518.00
5412	Accounting and Bookkeeping Services	163	2,293	\$1,599.64	160	1,970	\$1,520.86	160	1,885	\$1,525.00
5413	Architectural and Engineering Services	192	1,900	\$1,375.78	193	1,872	\$1,420.72	196	1,885	\$1,464.00
5414	Specialized Design Services	34	237	\$1,123.61	32	244	\$1,137.60	31	249	\$1,181.00
5415	Computer Systems Design and Related Services	396	3,177	\$1,883.60	394	2,988	\$1,939.40	388	3,261	\$2,050.00
5416	Management and Technical Consulting Services	189	903	\$1,590.38	202	948	\$1,663.12	205	928	\$1,563.00
5417	Scientific Research and Development Services	39	571	\$1,777.06	40	577	\$1,799.81	38	585	\$1,829.00
5418	Advertising and Related Services	51	432	\$913.06	49	430	\$864.63	50	403	\$1,015.00
5419	Other Professional and Technical Services	80	649	\$612.91	87	665	\$631.13	93	699	\$661.00
55	Management of Companies and Enterprises	92	2,880	\$1,280.55	94	2,950	\$1,316.53	103	2,997	\$1,316.00
551	Management of Companies and Enterprises	92	2,880	\$1,280.55	94	2,950	\$1,316.53	103	2,997	\$1,316.00
56	Administrative and Waste Services	719	8,217	\$617.11	741	8,720	\$614.98	775	9,160	\$639.00
561	Administrative and Support Services	693	8,057	\$614.52	715	8,557	\$612.16	747	9,006	\$637.00
5611	Office Administrative Services	96	621	\$1,362.72	98	558	\$1,332.27	111	589	\$1,426.00
5612	Facilities Support Services	0	0	\$0.00	n	n	n	n	n	n
5613	Employment Services	102	2,690	\$539.96	102	3,364	\$528.10	95	3,396	\$538.00
5614	Business Support Services	67	779	\$646.12	69	810	\$648.21	69	863	\$653.00
5615	Travel Arrangement and Reservation Services	36	204	\$791.54	39	201	\$850.34	43	206	\$927.00
5616	Investigation and Security Services	39	816	\$674.56	51	729	\$766.70	54	781	\$837.00
5617	Services to Buildings and Dwellings	339	2,754	\$480.90	343	2,675	\$500.40	351	2,786	\$516.00
5619	Other Support Services	13	193	\$582.29	n	n	n	n	n	n
562	Waste Management and Remediation Services	27	159	\$747.96	26	164	\$762.00	28	154	\$790.00
61	Educational Services	182	4,161	\$696.81	187	4,180	\$713.56	188	4,625	\$728.00
611	Educational Services	182	4,161	\$696.81	197	4,180	\$713.56	188	4,625	\$728.00
62	Health Care and Social Assistance	1,022	26,141	\$876.55	1,037	26,275	\$898.97	1,062	26,575	\$927.00
621	Ambulatory Health Care Services	664	9,203	\$1,206.85	675	9,263	\$1,237.08	690	9,436	\$1,282.00
622	Hospitals	7	8,268	\$901.06	7	8,343	\$830.08	10	8,590	\$950.00
623	Nursing and Residential Care Facilities	108	5,084	\$554.06	105	5,185	\$552.26	98	5,124	\$552.00
624	Social Assistance	243	3,586	\$429.60	250	3,484	\$441.38	264	3,425	\$451.00
71	Arts, Entertainment, and Recreation	144	2,408	\$367.77	144	2,419	\$367.53	150	2,418	\$385.00
711	Performing Arts and Spectator Sports	29	251	\$805.03	29	256	\$784.96	29	252	\$891.00
712	Museums, Historic Sites, Zoos, and Parks	10	131	\$393.65	10	131	\$429.07	11	135	\$427.00
713	Gambling, Recreation, Amusement Industries	105	2,026	\$311.96	105	2,032	\$310.93	111	2,031	\$320.00
72	Accommodation and Food Services	796	13,810	\$319.06	800	13,863	\$320.91	810	13,998	\$324.00
721	Accommodation	57	1,350	\$420.36	56	1,311	\$406.63	51	1,246	\$418.00
722	Food Services and Drinking Places	739	12,460	\$308.08	744	12,552	\$311.96	759	12,752	\$315.00
81	Other Services Except Public Admin	939	6,394	\$597.60	940	6,343	\$595.30	959	6,523	\$599.00
811	Repair and Maintenance	351	1,952	\$846.74	354	1,906	\$842.47	350	1,942	\$857.00
812	Personal and Laundry Services	283	2,283	\$469.29	284	2,248	\$484.03	290	2,326	\$481.00
813	Membership Associations and Organizations	170	1,968	\$513.96	170	1,990	\$498.92	178	2,048	\$506.00
814	Private Households	135	191	\$446.56	132	200	\$449.41	141	207	\$444.00
99	Unclassified Establishments	n	n	n	9	15	\$1,035.51	n	n	n
999	Unclassified Establishments	n	n	n	9	15	\$1,035.51	n	n	n
Total Government		279	21,980	\$931.82	283	21,799	\$941.71	281	21,407	\$974.00
	Federal Government	75	3,924	\$1,485.64	74	3,921	\$1,492.79	74	3,841	\$1,544.00
	State Government	89	2,005	\$763.20	90	1,958	\$767.52	91	1,994	\$753.00
	Local Government	115	16,051	\$817.48	119	15,919	\$827.41	117	15,572	\$862.00

Source: NH Economic and Labor Market Information Bureau

Table C-2: Employment and Wages for Rockingham County

NAICS Code	Industry	Rockingham County 2009			Rockingham County 2010			Rockingham County 2011		
		Units	Average Annual Empl.	Average Weekly Wage	Units	Average Annual Empl.	Average Weekly Wage	Units	Average Annual Empl.	Average Weekly Wage
ALL	Total, Private plus Government	9,831	131,375	\$839.06	9,754	131,892	\$862.17	9,783	133,444	\$881
	Total Private	9,531	116,492	\$840.45	9,455	117,079	\$865.32	9,497	119,079	\$884
101	Goods Producing	1,466	19,644	\$1,104.36	1,411	18,689	\$1,199.72	1,371	18,941	\$1,146
11	Agriculture, Forestry, Fishing and Hunting	28	235	\$429.97	28	241	\$501.43	27	240	\$441
111	Crop Production	13	161	\$351.42	12	162	\$460.55	13	161	\$360
112	Animal Production	5	25	\$575.61	6	28	\$594.99	5	26	\$614
113	Forestry and Logging	n	n	n	n	n	n	3	19	\$647
114	Fishing, Hunting, and Trapping	n	n	n	n	n	n	n	n	n
115	Agriculture and Forestry support Activities	6	27	\$485.45	6	29	\$480.55	n	n	n
21	Mining	9	107	\$1,023.71	10	104	\$1,064.33	11	113	\$1,112
211	Oil and Gas Extraction	0	0	\$0.00	0	0	\$0.00	n	n	n
212	Mining, except Oil and Gas	n	n	n	n	n	n	n	n	n
213	Support Activities for Mining	n	n	n	n	n	n	n	n	n
23	Construction	952	5,461	\$991.20	910	5,220	\$980.95	870	5,407	\$1,018
236	Construction of Buildings	247	904	\$978.93	241	896	\$948.06	229	891	\$976
237	Heavy and Civil Engineering Construction	51	766	\$1,254.04	52	805	\$1,358.14	51	809	\$1,315
238	Specialty Trade Contractors	654	3,792	\$941.06	618	3,520	\$903.11	590	3,708	\$964
31-33	Manufacturing	476	13,840	\$1,161.09	464	13,123	\$1,300.66	464	13,181	\$1,212
311	Food Manufacturing	35	1,275	\$973.99	32	1,187	\$1,088.94	30	1,189	\$1,196
312	Beverage and Tobacco Product Manufacturing	6	217	\$911.22	7	228	\$940.45	8	250	\$943
313	Textile Mills	n	n	n	n	n	n	n	n	n
314	Textile Product Mills	n	n	n	n	n	n	n	n	n
315	Apparel Manufacturing	n	n	n	n	n	n	n	n	n
316	Leather and Allied Product Manufacturing	n	n	n	n	n	n	n	n	n
321	Wood Product Manufacturing	19	293	\$845.83	19	199	\$891.55	18	166	\$931
322	Paper Manufacturing	6	82	\$801.32	6	84	\$810.06	8	98	\$781
323	Printing and Related Support Activities	45	503	\$741.17	40	377	\$788.91	40	392	\$791
324	Petroleum and Coal Products Manufacturing	6	164	\$1,140.21	5	158	\$1,301.67	5	165	\$1,249
325	Chemical Manufacturing	18	824	\$1,451.04	20	851	\$1,354.59	18	926	\$1,415
326	Plastics and Rubber Products Manufacturing	21	962	\$962.14	21	985	\$956.47	20	977	\$940
327	Nonmetallic Mineral Product Manufacturing	17	764	\$1,020.97	17	718	\$1,094.79	19	724	\$1,214
331	Primary Metal Manufacturing	6	416	\$881.61	6	339	\$910.34	6	313	\$927
332	Fabricated Metal Product Manufacturing	103	2,003	\$1,128.93	102	1,966	\$1,217.87	100	2,162	\$1,190
333	Machinery Manufacturing	33	1,791	\$1,369.77	30	1,640	\$2,022.53	31	1,605	\$1,220
334	Computer and Electronic Product Manufacturing	70	2,473	\$1,464.26	70	2,540	\$1,515.99	69	2,422	\$1,540
335	Electrical Equipment and Appliances Manufacturing	14	887	\$1,143.38	15	669	\$1,208.56	15	630	\$1,179
336	Transportation Equipment Manufacturing	7	50	\$921.32	8	69	\$916.56	9	99	\$870
337	Furniture and Related Product Manufacturing	24	278	\$923.17	22	263	\$909.33	22	265	\$968
339	Miscellaneous Manufacturing	32	455	\$904.64	34	437	\$1,061.78	33	375	\$941
102	Service Providing	8,065	96,848	\$786.93	8,044	98,391	\$801.80	8,108	100,138	\$834
22	Utilities	18	1,106	\$1,975.90	17	1,076	\$1,874.93	19	1,063	\$2,137
221	Utilities	18	1,106	\$1,975.90	17	1,076	\$1,874.93	19	1,063	\$2,137
42	Wholesale Trade	968	6,227	\$1,276.46	944	6,114	\$1,357.89	963	6,246	\$1,392
423	Merchant Wholesalers, Durable Goods	292	2,979	\$1,157.79	282	2,910	\$1,193.64	290	2,974	\$1,258
424	Merchant Wholesalers, Nondurable Goods	98	1,694	\$1,104.78	99	1,737	\$1,196.74	99	1,697	\$1,170
425	Electronic Markets and Agents and Brokers	578	1,553	\$1,691.37	563	1,467	\$1,874.69	575	1,575	\$1,885
44-45	Retail Trade	1,434	24,272	\$470.90	1,439	24,665	\$474.98	1,450	25,241	\$484
441	Motor Vehicle and Parts Dealers	183	2,437	\$830.84	180	2,470	\$846.46	182	2,506	\$864
442	Furniture and Home Furnishings Stores	77	649	\$590.55	74	626	\$595.42	73	653	\$570
443	Electronics and Appliance Stores	78	813	\$809.69	86	949	\$777.32	91	1,042	\$822
444	Building Material and Garden Supply Stores	124	2,376	\$626.87	131	2,596	\$634.44	131	2,636	\$651
445	Food and Beverage Stores	138	5,791	\$329.54	136	5,975	\$329.98	136	6,068	\$333
446	Health and Personal Care Stores	87	1,002	\$537.15	88	1,003	\$489.68	95	1,079	\$516
447	Gasoline Stations	120	932	\$384.37	115	936	\$379.06	117	976	\$370
448	Clothing and Clothing Accessories Stores	196	2,249	\$296.71	190	2,285	\$30,836.00	181	1,971	\$312
451	Sporting Goods, Hobby, Book, and Music Stores	111	1,153	\$307.46	115	1,169	\$332.88	106	1,042	\$330
452	General Merchandise Stores	56	4,527	\$391.70	59	4,475	\$393.41	63	4,808	\$380
453	Miscellaneous Store Retailers	196	1,553	\$372.29	194	1,562	\$364.51	201	1,672	\$381
454	Nonstore Retailers	70	791	\$880.30	74	800	\$857.87	76	787	\$937
48-49	Transportation and Warehousing	226	3,903	\$708.53	222	3,911	\$723.68	225	3,986	\$744
481	Air Transportation	12	136	\$1,024.19	11	126	\$1,080.33	9	130	\$1,079
484	Truck Transportation	101	841	\$867.88	97	838	\$888.86	98	866	\$894
485	Transit and Ground Passenger Transportation	36	1,244	\$400.81	37	1,263	\$425.20	35	1,266	\$447
486	Pipeline Transportation	n	n	n	n	n	n	n	n	n
487	Scenic and Sightseeing Transportation	n	n	n	n	n	n	n	n	n
488	Support Activities for Transportation	26	271	\$961.69	30	277	\$974.13	33	306	\$1,098
491	Postal Service	0	0	\$0.00	0	0	\$0.00	0	0	\$0
492	Couriers and Messengers	22	455	\$874.20	20	465	\$887.73	20	473	\$902
493	Warehousing and Storage	18	886	\$791.62	16	868	\$795.93	16	869	\$784

Source: NH Economic and Labor Market Information Bureau

Table C-2: Employment and Wages for Rockingham County (continued)

NAICS Code	Industry	Rockingham County 2009			Rockingham County 2010			Rockingham County 2011		
		Units	Average Annual Empl.	Average Weekly Wage	Units	Average Annual Empl.	Average Weekly Wage	Units	Average Annual Empl.	Average Weekly Wage
51	Information	141	2,661	\$1,330.91	137	2,580	\$1,445.29	123	2,445	\$1,539
511	Publishing Industries (except Internet)	50	1,035	\$1,583.46	51	1,045	\$1,738.63	46	1,014	\$1,917
512	Motion Picture and Sound Recording	12	150	\$307.81	11	117	\$358.65	9	105	\$394
515	Broadcasting, except Internet	4	69	\$1,079.18	4	52	\$1,013.91	4	57	\$1,091
517	Telecommunications	35	822	\$1,456.93	30	798	\$1,504.92	21	727	\$1,498
518	Data Processing and Related Services	25	436	\$1,098.74	25	493	\$1,103.32	24	480	\$1,155
519	Other Information Services	16	149	\$708.84	16	75	\$963.18	18	61	\$1,165
52	Finance and Insurance	427	5,024	\$1,478.30	411	4,887	\$1,524.68	421	4,997	\$1,545
522	Credit Intermediation and Related Activities	158	2,200	\$1,207.20	150	2,134	\$1,268.61	151	2,099	\$1,290
523	Financial Investment and Related Activities	120	571	\$2,262.18	121	535	\$2,415.33	124	554	\$2,590
524	Insurance Carriers and Related Activities	143	2,247	\$1,544.09	134	2,211	\$1,558.34	139	2,333	\$1,528
525	Funds, Trusts, and Other Financial Vehicles	7	7	\$1,673.66	7	7	\$868.78	8	11	\$961
53	Real Estate and Rental and Leasing	326	1,746	\$870.21	323	1,696	\$934.11	312	1,721	\$983
531	Real Estate	255	1,142	\$843.35	258	1,133	\$883.38	251	1,137	\$902
532	Rental and Leasing Services	71	605	\$920.96	65	563	\$1,036.20	61	583	\$1,141
533	Lessors of Nonfinancial Intangible Assets	0	0	\$0.00	0	0	\$0.00	0	0	\$0
54	Professional and Technical Services	1,140	6,984	\$1,274.37	1,133	6,981	\$1,319.19	1,130	7,129	\$1,372
541	Professional and Technical Services	1,140	6,984	\$1,274.37	1,133	6,981	\$1,319.19	1,130	7,129	\$1,372
5411	Legal Services	176	828	\$1,096.78	172	805	\$1,108.79	176	806	\$1,125
5412	Accounting and Bookkeeping Services	141	940	\$870.12	139	971	\$870.60	133	1,007	\$946
5413	Architectural and Engineering Services	179	1,251	\$1,487.87	181	1,176	\$1,690.91	186	1,169	\$1,780
5414	Specialized Design Services	18	49	\$1,143.29	18	49	\$1,168.44	21	51	\$1,132
5415	Computer Systems Design and Related Services	239	1,665	\$1,422.14	240	1,711	\$1,402.25	242	1,738	\$1,375
5416	Management and Technical Consulting Services	222	740	\$1,678.86	215	766	\$1,604.40	212	905	\$1,884
5417	Scientific Research and Development Services	33	263	\$2,138.77	30	218	\$2,654.62	25	214	\$2,440
5418	Advertising and Related Services	46	256	\$936.61	50	275	\$1,044.63	51	265	\$1,022
5419	Other Professional and Technical Services	88	992	\$850.92	88	1,009	\$921.37	85	974	\$920
55	Management of Companies and Enterprises	82	2,045	\$1,774.44	87	2,038	\$1,948.23	91	1,999	\$2,592
551	Management of Companies and Enterprises	82	2,045	\$1,774.44	87	2,038	\$1,948.23	91	1,999	\$2,592
56	Administrative and Waste Services	662	7,394	\$814.92	679	8,147	\$815.11	694	8,374	\$830
561	Administrative and Support Services	604	6,676	\$785.31	624	7,574	\$790.85	635	7,791	\$810
5611	Office Administrative Services	87	660	\$1,812.06	100	701	\$1,702.44	109	753	\$1,805
5612	Facilities Support Services	n	n	n	n	n	n	6	60	\$437
5613	Employment Services	106	2,380	\$698.05	107	3,254	\$684.60	101	3,367	\$701
5614	Business Support Services	52	962	\$833.14	55	995	\$957.46	58	976	\$908
5615	Travel Arrangement and Reservation Services	41	167	\$1,089.97	41	177	\$1,116.41	41	185	\$1,159
5616	Investigation and Security Services	25	700	\$726.82	27	721	\$714.89	27	669	\$844
5617	Services to Buildings and Dwellings	275	1,525	\$490.87	277	1,474	\$507.83	281	1,562	\$507
5619	Other Support Services	n	n	n	n	n	n	13	219	\$515
562	Waste Management and Remediation Services	58	718	\$1,090.31	55	573	\$1,135.81	59	584	\$1,093
61	Educational Services	133	2,558	\$701.67	135	2,588	\$697.23	133	2,678	\$690
611	Educational Services	133	2,558	\$701.67	135	2,588	\$697.23	133	2,678	\$690
62	Health Care and Social Assistance	845	14,238	\$832.93	838	14,487	\$838.15	850	14,871	\$853
621	Ambulatory Health Care Services	567	5,760	\$1,075.70	567	5,922	\$1,093.37	581	6,089	\$1,126
622	Hospitals	9	3,715	\$923.85	8	3,655	\$918.49	6	3,599	\$930
623	Nursing and Residential Care Facilities	14	2,293	\$562.27	47	2,335	\$567.88	47	2,519	\$574
624	Social Assistance	222	2,471	\$381.29	216	2,576	\$382.27	217	2,664	\$392
71	Arts, Entertainment, and Recreation	157	2,840	\$362.41	156	2,936	\$364.34	156	2,928	\$374
711	Performing Arts and Spectator Sports	32	497	\$444.52	30	405	\$521.21	30	416	\$542
712	Museums, Historic Sites, Zoos, and Parks	13	152	\$345.49	14	154	\$330.93	13	141	\$318
713	Gambling, Recreation, Amusement Industries	112	2,191	\$344.94	113	2,377	\$339.75	114	2,371	\$348
72	Accommodation and Food Services	741	12,036	\$329.22	765	12,398	\$333.95	771	12,539	\$340
721	Accommodation	83	1,455	\$408.77	85	1,564	\$414.05	81	1,547	\$418
722	Food Services and Drinking Places	658	10,581	\$318.27	880	10,834	\$322.38	691	10,992	\$329
81	Other Services Except Public Admin	763	3,810	\$575.24	751	3,866	\$588.51	766	3,915	\$608
811	Repair and Maintenance	281	1,480	\$826.78	276	1,508	\$847.41	287	1,597	\$862
812	Personal and Laundry Services	267	1,542	\$384.08	264	1,588	\$384.76	259	1,509	\$396
813	Membership Associations and Organizations	99	636	\$484.07	102	621	\$511.42	104	649	\$515
814	Private Households	117	153	\$446.24	110	149	\$461.83	116	160	\$457
99	Unclassified Establishments	n	n	n	8	20	\$347.99	6	7	\$452
999	Unclassified Establishments	n	n	n	8	20	\$347.99	6	7	\$452
Total Government		300	14,883	\$828.12	299	14,813	\$837.26	304	14,366	\$855
	Federal Government	64	1,265	\$1,126.61	64	1,317	\$1,101.34	64	1,122	\$1,200
	State Government	93	1,310	\$676.26	93	1,292	\$670.38	97	1,285	\$663
	Local Government	114	12,308	\$813.61	142	12,204	\$826.44	144	11,958	\$844

Source: NH Economic and Labor Market Information Bureau

Table C-2: Employment and Wages for State of NH

NAICS Code Industry		State of NH - 2010					State of NH - 2011				
		Average Annual Units	Average Annual Empl.	Average Weekly Wage	Hills Co share of employmt	Rock Co share of employmt	Average Annual Units	Average Annual Empl.	Average Weekly Wage	Hills Co share of employmt	Rock Co share of employmt
ALL	Total, Private plus Government	43,778	600,540	\$883.88	30.7%	22.0%	44,113	605,864	\$909.31	30.8%	22.0%
	Total Private	41,795	513,386	\$890.13	31.7%	22.8%	42,132	520,338	\$916.27	31.7%	22.9%
101	Goods Producing	6,055	89,428	\$1,119.47	35.9%	20.9%	5,941	90,996	\$1,140.95	35.9%	20.8%
11	Agriculture, Forestry, Fishing and Hunting	244	1,752	\$579.00	8.8%	13.8%	235	1,763	\$571.97	7.7%	13.6%
111	Crop Production	65	794	\$478.92	9.4%	20.4%	62	797	\$442.86	8.9%	20.2%
112	Animal Production	49	395	\$494.28	2.5%	7.1%	48	421	\$501.43	#VALUE!	6.2%
113	Forestry and Logging	94	428	\$736.47	12.6%	#VALUE!	93	409	\$747.88	12.2%	4.6%
114	Fishing, Hunting, and Trapping	n	n	n	#VALUE!	#VALUE!	n	n	n	#VALUE!	#VALUE!
115	Agriculture and Forestry support Activities	n	n	n	#VALUE!	#VALUE!	n	n	n	#VALUE!	#VALUE!
21	Mining	61	491	\$1,078.95	6.5%	21.2%	60	495	\$1,068.59	7.7%	22.8%
211	Oil and Gas Extraction	Not included in 2010			#DIV/0!	#DIV/0!	n	n	n	#VALUE!	#VALUE!
212	Mining, except Oil and Gas	n	n	n	#VALUE!	#VALUE!	n	n	n	#VALUE!	#VALUE!
213	Support Activities for Mining	n	n	n	#VALUE!	#VALUE!	n	n	n	#VALUE!	#VALUE!
23	Construction	3,736	21,418	\$948.93	27.3%	24.4%	3,657	22,155	\$963.54	28.0%	24.4%
236	Construction of Buildings	1,001	4,936	\$980.13	26.4%	18.2%	959	5,036	\$989.48	27.1%	17.7%
237	Heavy and Civil Engineering Construction	194	2,561	\$1,209.05	11.3%	31.4%	202	2,630	\$1,207.48	5.0%	30.8%
238	Specialty Trade Contractors	2,542	13,921	\$890.02	30.5%	25.3%	2,497	14,490	\$910.25	31.2%	25.6%
31-33	Manufacturing	2,013	65,767	\$1,189.72	39.7%	20.0%	1,989	66,583	\$1,216.00	39.5%	19.8%
311	Food Manufacturing	102	2,220	\$914.28	19.5%	53.5%	102	2,201	\$981.00	18.6%	54.0%
312	Beverage and Tobacco Product Manufacturing	18	643	\$1,200.53	53.8%	35.5%	20	651	\$1,199.00	50.4%	38.4%
313	Textile Mills	27	1,457	\$1,021.42	36.9%	#VALUE!	27	1,509	\$1,084.00	36.9%	#VALUE!
314	Textile Product Mills	42	206	\$587.87	35.4%	#VALUE!	43	216	\$583.00	38.4%	#VALUE!
315	Apparel Manufacturing	19	437	\$799.05	9.6%	#VALUE!	17	433	\$859.00	10.4%	#VALUE!
316	Leather and Allied Product Manufacturing	13	160	\$666.74	#VALUE!	#VALUE!	11	158	\$643.00	#VALUE!	#VALUE!
321	Wood Product Manufacturing	114	1,657	\$762.71	7.7%	12.0%	108	1,567	\$758.00	9.3%	10.6%
322	Paper Manufacturing	25	1,334	\$975.10	61.6%	6.3%	25	1,139	\$1,032.00	65.3%	8.6%
323	Printing and Related Support Activities	174	2,377	\$840.45	26.8%	15.9%	175	2,359	\$855.00	26.6%	16.6%
324	Petroleum and Coal Products Manufacturing	18	224	\$1,292.48	#VALUE!	70.5%	17	230	\$1,266.00	#VALUE!	71.7%
325	Chemical Manufacturing	58	1,722	\$1,170.46	24.3%	49.4%	55	1,846	\$1,179.00	22.4%	50.2%
326	Plastics and Rubber Products Manufacturing	101	4,733	\$956.78	43.9%	20.8%	98	4,733	\$965.00	42.8%	20.6%
327	Nonmetallic Mineral Product Manufacturing	96	1,891	\$995.59	21.6%	38.0%	95	1,923	\$1,031.00	22.7%	37.6%
331	Primary Metal Manufacturing	39	2,576	\$969.84	40.0%	13.2%	39	2,768	\$960.00	42.1%	11.3%
332	Fabricated Metal Product Manufacturing	382	10,460	\$1,015.32	28.3%	18.8%	386	10,821	\$1,034.00	28.2%	20.0%
333	Machinery Manufacturing	168	7,466	\$1,402.09	18.0%	22.0%	166	7,692	\$1,292.00	16.8%	20.9%
334	Computer and Electronic Product Manufacturing	292	15,777	\$1,613.22	70.2%	16.1%	166	7,692	\$1,292.00	146.1%	31.5%
335	Electrical Equipment and Appliances Manufacturing	58	3,674	\$1,147.39	44.1%	18.2%	56	3,665	\$1,158.00	42.7%	17.2%
336	Transportation Equipment Manufacturing	37	1,642	\$1,237.20	13.6%	4.2%	39	1,719	\$1,254.00	13.3%	5.8%
337	Furniture and Related Product Manufacturing	74	887	\$750.30	9.8%	29.7%	74	886	\$777.00	9.6%	29.9%
339	Miscellaneous Manufacturing	158	4,225	\$982.08	42.6%	10.3%	153	4,212	\$1,233.00	44.6%	8.9%
102	Service Providing	35,740	423,957	\$841.75	30.8%	23.2%	36,191	429,342	\$869.00	30.8%	23.3%
22	Utilities	103	2,514	\$1,686.84	15.1%	42.8%	103	2,473	\$1,853.00	14.8%	43.0%
221	Utilities	103	2,514	\$1,686.84	15.1%	42.8%	103	2,473	\$1,853.00	14.8%	43.0%
42	Wholesale Trade	4,827	25,923	\$1,437.49	28.2%	23.6%	4,882	26,225	\$1,497.00	27.4%	23.8%
423	Merchant Wholesalers, Durable Goods	967	10,347	\$1,313.47	41.1%	28.1%	966	10,422	\$1,376.00	39.8%	28.5%
424	Merchant Wholesalers, Nondurable Goods	388	7,330	\$1,028.87	18.3%	23.7%	385	7,299	\$1,037.00	17.7%	23.2%
425	Electronic Markets and Agents and Brokers	3,472	8,246	\$1,956.38	20.7%	17.8%	3,531	8,504	\$2,041.00	20.5%	18.5%
44-45	Retail Trade	5,780	92,329	\$513.43	28.5%	26.7%	5,743	93,048	\$526.00	28.5%	27.1%
441	Motor Vehicle and Parts Dealers	746	10,896	\$843.01	31.1%	22.7%	752	11,188	\$862.00	31.3%	22.4%
442	Furniture and Home Furnishings Stores	293	2,300	\$586.23	32.2%	27.2%	282	2,329	\$577.00	32.4%	28.0%
443	Electronics and Appliance Stores	300	3,335	\$1,004.71	47.4%	28.5%	311	3,542	\$1,046.00	48.2%	29.4%
444	Building Material and Garden Supply Stores	526	9,119	\$616.81	23.4%	28.5%	524	9,088	\$623.00	23.4%	29.0%
445	Food and Beverage Stores	576	20,807	\$352.16	27.9%	28.7%	584	21,170	\$352.00	27.2%	28.7%
446	Health and Personal Care Stores	347	3,996	\$543.26	30.8%	25.1%	373	4,247	\$610.00	30.5%	25.4%
447	Gasoline Stations	597	4,622	\$367.89	19.8%	20.3%	591	4,605	\$365.00	19.5%	21.2%
448	Clothing and Clothing Accessories Stores	642	7,476	\$324.01	32.6%	30.6%	600	6,369	\$336.00	33.0%	30.9%
451	Sporting Goods, Hobby, Book, and Music Stores	453	4,434	\$361.21	32.7%	26.4%	417	4,232	\$369.00	33.6%	24.6%
452	General Merchandise Stores	229	15,145	\$399.20	25.0%	29.5%	247	16,104	\$389.00	25.4%	29.9%
453	Miscellaneous Store Retailers	724	5,142	\$395.83	32.1%	30.4%	716	5,139	\$395.00	32.3%	32.5%
454	Nonstore Retailers	345	5,059	\$907.93	23.0%	15.8%	347	5,036	\$971.00	24.1%	15.6%
48-49	Transportation and Warehousing	844	11,855	\$702.29	31.8%	33.0%	857	12,099	\$725.00	31.6%	32.9%
481	Air Transportation	42	491	\$1,046.41	65.6%	25.7%	39	483	\$1,106.00	65.4%	26.9%
484	Truck Transportation	376	2,833	\$824.94	28.1%	29.6%	389	8,297	\$845.00	10.0%	10.4%
485	Transit and Ground Passenger Transportation	140	3,079	\$404.15	24.1%	41.0%	138	3,095	\$425.00	22.6%	40.9%
486	Pipeline Transportation	n	n	n	#VALUE!	#VALUE!	n	n	n	#VALUE!	#VALUE!
487	Scenic and Sightseeing Transportation	25	283	\$483.82	#VALUE!	#VALUE!	25	310	\$471.00	#VALUE!	#VALUE!
488	Support Activities for Transportation	112	872	\$799.63	#VALUE!	31.8%	113	867	\$852.00	#VALUE!	35.3%
491	Postal Service	n	n	n	#VALUE!	#VALUE!	n	n	n	#VALUE!	#VALUE!
492	Couriers and Messengers	80	2,150	\$766.38	#VALUE!	21.6%	84	2,244	\$807.00	#VALUE!	21.1%
493	Warehousing and Storage	63	2,124	\$814.19	38.9%	40.9%	63	2,179	\$804.00	37.9%	39.9%

Source: NH Economic and Labor Market Information Bureau

Table C-2: Employment and Wages for State of NH (continued)

NAICS Code Industry		State of NH - 2010					State of NH - 2011				
		Units	Average Annual Empl.	Average Weekly Wage	Hills Co share of emplmt	Rock Co share of emplmt	Units	Average Annual Empl.	Average Weekly Wage	Hills Co share of emplmt	Rock Co share of emplmt
51	Information	697	11,475	\$1,499.95	45.1%	22.5%	679	11,137	\$1,433.00	46.7%	22.0%
511	Publishing Industries (except Internet)	424	5,229	\$1,736.62	49.1%	20.0%	233	4,825	\$1,653.00	51.8%	21.0%
512	Motion Picture and Sound Recording	56	605	\$551.48	33.2%	19.3%	54	609	\$594.00	34.8%	17.2%
515	Broadcasting, except Internet	46	672	\$863.12	31.3%	7.7%	45	662	\$901.00	31.9%	8.6%
517	Telecommunications	166	3,732	\$1,375.15	50.6%	21.4%	148	3,746	\$1,435.00	51.8%	19.4%
518	Data Processing and Related Services	88	805	\$1,256.67	24.2%	61.2%	88	855	\$1,305.00	25.5%	56.1%
519	Other Information Services	100	432	\$1,158.68	27.1%	17.4%	112	440	\$1,228.00	28.2%	13.9%
52	Finance and Insurance	1,942	26,249	\$1,500.96	35.4%	18.6%	1,957	36,752	\$1,569.00	25.6%	13.6%
522	Credit Intermediation and Related Activities	700	8,193	\$1,060.63	26.3%	26.0%	700	8,057	\$1,072.00	26.6%	26.1%
523	Financial Investment and Related Activities	435	5,369	\$2,342.39	79.3%	10.0%	445	5,579	\$2,631.00	79.8%	9.9%
524	Insurance Carriers and Related Activities	776	12,522	\$1,435.28	22.0%	17.7%	778	12,797	\$1,466.00	49.1%	18.2%
525	Funds, Trusts, and Other Financial Vehicles	31	346	\$1,248.49	36.1%	2.0%	35	320	\$1,438.00	38.1%	3.4%
53	Real Estate and Rental and Leasing	1,341	6,713	\$786.26	34.4%	25.3%	1,322	6,778	\$904.00	34.2%	25.4%
531	Real Estate	1,041	4,632	\$764.05	37.1%	24.5%	1,045	4,741	\$894.00	37.1%	24.0%
532	Rental and Leasing Services	294	2,046	\$826.08	#VALUE!	27.5%	270	1,992	\$920.00	27.6%	29.3%
533	Lessors of Nonfinancial Intangible Assets	7	36	\$1,386.00	#VALUE!	0.0%	8	45	\$1,329.00	17.8%	0.0%
54	Professional and Technical Services	5,153	28,849	\$1,431.55	39.6%	24.2%	5,270	29,829	\$1,483.00	38.9%	23.9%
541	Professional and Technical Services	5,153	28,849	\$1,431.55	39.6%	24.2%	5,270	29,829	\$1,483.00	38.9%	23.9%
5411	Legal Services	767	4,233	\$1,363.98	40.8%	19.0%	770	4,169	\$1,368.00	40.9%	19.3%
5412	Accounting and Bookkeeping Services	568	4,151	\$1,229.83	47.5%	23.4%	570	4,047	\$1,255.00	46.6%	24.9%
5413	Architectural and Engineering Services	715	4,707	\$1,477.72	39.8%	25.0%	735	5,084	\$1,537.00	37.1%	23.0%
5414	Specialized Design Services	89	378	\$1,045.18	64.6%	13.0%	95	376	\$1,115.00	66.2%	13.6%
5415	Computer Systems Design and Related Services	1,382	6,650	\$1,773.08	44.9%	25.7%	1,435	7,188	\$1,832.00	45.4%	24.2%
5416	Management and Technical Consulting Services	913	3,111	\$1,661.35	30.5%	24.6%	928	3,288	\$1,775.00	28.2%	27.5%
5417	Scientific Research and Development Services	140	1,463	\$1,966.92	39.4%	14.9%	138	1,491	\$1,969.00	39.2%	14.4%
5418	Advertising and Related Services	225	1,359	\$742.20	31.6%	20.2%	230	1,365	\$773.00	29.5%	19.4%
5419	Other Professional and Technical Services	356	2,798	\$795.08	23.8%	36.1%	370	2,822	\$808.00	24.8%	34.5%
55	Management of Companies and Enterprises	382	8,075	\$1,542.35	36.5%	25.2%	418	8,094	\$1,704.39	37.0%	24.7%
551	Management of Companies and Enterprises	382	8,075	\$1,542.35	36.5%	25.2%	418	8,094	\$1,704.39	37.0%	24.7%
56	Administrative and Waste Services	3,034	27,231	\$768.67	32.0%	29.9%	3,170	28,532	\$774.27	32.1%	29.3%
561	Administrative and Support Services	2,964	25,667	\$751.92	33.3%	29.5%	2,993	26,950	\$763.03	33.4%	28.9%
5611	Office Administrative Services	528	3,017	\$1,606.38	18.5%	23.2%	612	3,119	\$1,730.99	18.9%	24.1%
5612	Facilities Support Services	6	33	\$831.68	#VALUE!	#VALUE!	32	317	\$413.58	#VALUE!	18.9%
5613	Employment Services	568	9,679	\$656.55	34.8%	33.6%	556	10,201	\$649.85	33.3%	33.0%
5614	Business Support Services	265	2,657	\$789.68	30.5%	37.4%	269	2,698	\$767.16	32.0%	36.2%
5615	Travel Arrangement and Reservation Services	125	606	\$974.81	33.2%	29.2%	130	620	\$1,018.28	33.2%	29.8%
5616	Investigation and Security Services	146	1,987	\$717.13	36.7%	36.3%	145	1,984	\$788.05	39.4%	33.7%
5617	Services to Buildings and Dwellings	1,155	6,885	\$504.59	38.9%	21.4%	1,173	7,163	\$503.05	38.9%	21.8%
5619	Other Support Services	71	802	\$601.29	#VALUE!	#VALUE!	76	850	\$633.48	#VALUE!	25.8%
562	Waste Management and Remediation Services	171	1,564	\$1,043.39	10.5%	36.6%	177	1,582	\$965.68	9.7%	36.9%
61	Educational Services	652	17,149	\$905.08	24.4%	15.1%	647	17,292	\$918.53	26.7%	15.5%
611	Educational Services	652	17,149	\$905.08	24.4%	15.1%	647	17,292	\$918.53	26.7%	15.5%
62	Health Care and Social Assistance	3,565	83,592	\$901.00	31.4%	17.3%	3,610	84,345	\$923.71	31.5%	17.6%
621	Ambulatory Health Care Services	2205	28,733	\$1,225.20	32.2%	20.6%	2231	28,933	\$1,264.94	32.6%	21.0%
622	Hospitals	36	27,537	\$968.55	30.3%	13.3%	39	27,518	\$998.18	31.2%	13.1%
623	Nursing and Residential Care Facilities	336	14,778	\$568.82	35.1%	15.8%	326	14,994	\$574.25	34.2%	16.8%
624	Social Assistance	989	12,543	\$401.43	27.8%	20.5%	1,014	12,899	\$405.67	26.6%	20.7%
71	Arts, Entertainment, and Recreation	664	10,980	\$363.12	22.0%	26.7%	678	11,193	\$367.77	21.6%	26.2%
711	Performing Arts and Spectator Sports	138	1,436	\$586.71	17.8%	28.2%	138	1,439	\$613.07	17.5%	28.9%
712	Museums, Historic Sites, Zoos, and Parks	59	561	\$378.20	23.4%	27.5%	63	575	\$385.07	23.5%	24.5%
713	Gambling, Recreation, Amusement Industries	468	8,983	\$326.44	22.6%	26.5%	477	9,178	\$328.21	22.1%	25.8%
72	Accommodation and Food Services	3,221	51,363	\$327.88	27.0%	24.1%	3,266	52,068	\$332.74	26.9%	24.1%
721	Accommodation	505	8,730	\$396.40	15.0%	17.9%	492	8,859	\$405.04	14.1%	17.5%
722	Food Services and Drinking Places	2,716	42,633	\$313.85	29.4%	25.4%	2,774	43,209	\$317.91	29.5%	25.4%
81	Other Services Except Public Admin	3,455	19,365	\$597.38	32.8%	20.0%	3,508	19,374	\$608.59	33.7%	20.2%
811	Repair and Maintenance	1,254	6,225	\$859.88	30.6%	24.2%	1,282	6,329	\$871.85	30.7%	25.2%
812	Personal and Laundry Services	933	6,324	\$434.46	35.5%	25.1%	936	6,280	\$441.41	37.0%	24.0%
813	Membership Associations and Organizations	719	5,921	\$518.56	33.6%	10.5%	723	5,848	\$528.15	35.0%	11.1%
814	Private Households	549	895	\$444.22	22.3%	16.6%	568	916	\$449.27	22.6%	17.5%
99	Unclassified Establishments	79	114	\$1,120.13	13.2%	17.5%	84	105	\$1,572.07	#VALUE!	6.7%
999	Unclassified Establishments	79	114	\$1,120.13	13.2%	17.5%	84	105	\$1,572.07	#VALUE!	6.7%
Total Government		1,983	87,154	\$847.05	25.0%	17.0%	1,981	85,527	\$867.02	25.0%	16.8%
	Federal Government	385	8,005	\$1,289.16	49.0%	16.5%	382	7,390	\$1,388.53	52.0%	15.2%
	State Government	807	20,683	\$911.11	9.5%	6.2%	811	20,678	\$910.23	9.6%	6.2%
	Local Government	790	58,466	\$763.86	27.2%	20.9%	788	57,459	\$784.40	27.1%	20.8%

Source: NH Economic and Labor Market Information Bureau

Table C-3: Employers, Employment & Wages by Town

Town/Area	2010			2011			# Change: 2010-2011			% CHANGE: 2010-2011		
	Estab- lishments	Avg. Annl. Employ- ment	Average Weekly Wage	Estab- lishments	Avg. Annl. Employ- ment	Average Weekly Wage	Estab- lishments	Avg. Annl. Employ- ment	Average Weekly Wage	Estab- lishments	Avg. Annl. Employ- ment	Average Weekly Wage
East Kingston	36	190	\$661	41	209	\$874	5	19	\$213	13.9%	10.0%	32.2%
Exeter	567	9,660	\$906	565	9,617	\$950	-2	-43	\$44	-0.4%	-0.4%	4.9%
Greenland	162	2,049	\$868	166	2,000	\$886	4	-49	\$18	2.5%	-2.4%	2.1%
Hampton	524	5,418	\$885	520	5,383	\$890	-4	-35	\$5	-0.8%	-0.6%	0.6%
Hampton Falls	76	413	\$670	84	497	\$590	8	84	-\$80	10.5%	20.3%	-11.9%
Kensington	48	278	\$825	41	271	\$847	-7	-7	\$22	-14.6%	-2.5%	2.7%
New Castle	n	n	n	32	328	\$603	n	n	n	n	n	n
Newfields	56	657	\$709	61	632	\$740	5	-25	\$31	8.9%	-3.8%	4.4%
Newington	197	4,507	\$671	194	4,376	\$689	-3	-131	\$18	-1.5%	-2.9%	2.7%
Newmarket	140	1,237	\$734	143	1,243	\$767	3	6	\$33	2.1%	0.5%	4.5%
North Hampton	266	2,353	\$749	278	2,338	\$739	12	-15	-\$10	4.5%	-0.6%	-1.3%
Portsmouth	1,743	27,842	\$1,039	1,765	28,568	\$1,048	22	726	\$9	1.3%	2.6%	0.9%
Rye	n	n	n	170	1,239	\$710	n	n	n	n	n	n
Seabrook	310	5,951	\$877	306	6,027	\$978	-4	76	\$101	-1.3%	1.3%	11.5%
South Hampton	34	131	\$776	33	119	\$801	-1	-12	\$25	-2.9%	-9.2%	3.2%
Stratham	261	3,747	\$1,050	257	3,756	\$1,446	-4	9	\$396	-1.5%	0.2%	37.7%
CEDS Eastern Towns	4,420	64,433	\$816	4,656	66,603	\$847	236	2,170	\$32	5.3%	3.4%	3.9%
Atkinson	117	949	\$863	116	958	\$883	-1	9	\$20	-0.9%	0.9%	2.3%
Auburn	134	1,588	\$727	131	1,583	\$767	-3	-5	\$40	-2.2%	-0.3%	5.5%
Brentwood	140	1,799	\$861	140	2,014	\$804	0	215	-\$57	0.0%	12.0%	-6.6%
Candia	97	717	\$741	103	763	\$743	6	46	\$2	6.2%	6.4%	0.3%
Chester	84	525	\$629	76	636	\$616	-8	111	-\$13	-9.5%	21.1%	-2.1%
Danville	40	160	\$579	44	160	\$662	4	0	\$83	10.0%	0.0%	14.3%
Deerfield	67	346	\$597	68	363	\$630	1	17	\$33	1.5%	4.9%	5.5%
Epping	158	2,349	\$605	161	2,424	\$594	3	75	-\$11	1.9%	3.2%	-1.8%
Fremont	63	704	\$550	64	506	\$641	1	-198	\$91	1.6%	-28.1%	16.5%
Hampstead	261	2,238	\$705	257	2,221	\$693	-4	-17	-\$12	-1.5%	-0.8%	-1.7%
Kingston	158	1,441	\$641	160	1,432	\$657	2	-9	\$16	1.3%	-0.6%	2.5%
Newton	53	463	\$772	56	465	\$759	3	2	-\$13	5.7%	0.4%	-1.7%
Northwood	96	1,015	\$628	99	996	\$672	3	-19	\$44	3.1%	-1.9%	7.0%
Nottingham	49	270	\$783	51	286	\$752	2	16	-\$31	4.1%	5.9%	-4.0%
Plaistow	349	4,608	\$631	343	4,615	\$651	-6	7	\$20	-1.7%	0.2%	3.2%
Raymond	174	2,689	\$769	182	2,659	\$831	8	-30	\$62	4.6%	-1.1%	8.1%
Sandown	53	257	\$592	54	251	\$608	1	-6	\$16	1.9%	-2.3%	2.7%
CEDS Central Towns	2,093	22,118	\$687	2,105	22,332	\$704	12	214	\$17	0.6%	1.0%	2.5%
Derry	627	7,546	\$765	607	7,550	\$777	-20	4	\$12	-3.2%	0.1%	1.6%
Hudson	614	10,274	\$988	625	10,462	\$1,031	11	188	\$43	1.8%	1.8%	4.4%
Litchfield	86	826	\$818	88	819	\$791	2	-7	-\$27	2.3%	-0.8%	-3.3%
Londonderry	804	13,306	\$979	795	13,346	\$869	-9	40	-\$110	-1.1%	0.3%	-11.2%
Merrimack	660	14,687	\$1,422	673	14,768	\$1,682	13	81	\$260	2.0%	0.6%	18.3%
Nashua	2,651	48,137	\$1,008	2,666	48,631	\$1,023	15	494	\$15	0.6%	1.0%	1.5%
Pelham	261	2,183	\$782	253	2,159	\$799	-8	-24	\$17	-3.1%	-1.1%	2.2%
Salem	1,244	19,740	\$789	1,252	20,552	\$813	8	812	\$24	0.6%	4.1%	3.0%
Windham	368	3,175	\$849	372	3,065	\$827	4	-110	-\$22	1.1%	-3.5%	-2.6%
CEDS Western Towns	7,315	119,874	\$933	7,331	121,352	\$957	16	1,478	\$24	0.2%	1.2%	2.5%
REDC CEDS region	13,828	206,425	\$787	14,092	210,287	\$813	264	3,862	\$25	1.9%	1.9%	3.2%
Hillsborough County	11,063	184,628	\$981	11,094	186,437	\$1,014	31	1,809	\$33.00	0.3%	1.0%	3.4%
Rockingham County	9,754	131,892	\$862	9,783	133,444	\$881	29	1,552	\$19.00	0.3%	1.2%	2.2%
New Hampshire	43,778	600,540	\$884	44,113	605,864	\$901	335	5,324	\$17.00	0.8%	0.9%	1.9%

Source: NH Dept. of Employment Security, Labor Market Information Bureau

Table C-4: Current and Historic Unemployment Data

Town/Area	Unemployment Rate								10-yr change from 2002 to 2012	1-yr change from 2011 to 2012
	Annual 2002*	Annual 2006*	Annual 2007*	Annual 2008*	Annual 2009*	Annual 2010*	Annual 2011*	Annual 2012*		
East Kingston	4.1%	3.9%	4.0%	4.3%	6.0%	5.2%	4.8%	5.0%	0.9%	0.2%
Exeter	4.5%	3.5%	3.5%	4.1%	6.3%	6.1%	5.7%	5.7%	1.2%	0.0%
Greenland	3.4%	2.8%	3.0%	3.2%	5.0%	5.1%	5.0%	4.6%	1.2%	-0.4%
Hampton	5.0%	3.8%	3.6%	4.2%	6.3%	6.0%	5.3%	5.8%	0.8%	0.5%
Hampton Falls	3.9%	4.2%	3.5%	4.2%	5.8%	5.1%	5.2%	5.4%	1.5%	0.2%
Kensington	4.1%	4.0%	3.7%	4.6%	6.4%	5.8%	5.3%	5.3%	1.2%	0.0%
New Castle	3.5%	2.9%	3.2%	2.9%	4.2%	4.2%	3.4%	4.0%	0.5%	0.6%
Newfields	3.3%	3.0%	2.7%	3.3%	5.8%	6.0%	5.0%	5.1%	1.8%	0.1%
Newington	2.6%	2.6%	2.5%	2.7%	4.8%	5.4%	3.4%	5.2%	2.6%	1.8%
Newmarket	4.1%	2.9%	2.8%	3.2%	5.1%	5.2%	4.5%	4.5%	0.4%	0.0%
North Hampton	3.5%	3.2%	2.7%	3.0%	4.7%	4.9%	4.2%	5.1%	1.6%	0.9%
Portsmouth	4.2%	2.9%	2.9%	3.4%	5.2%	4.8%	4.3%	4.3%	0.1%	0.0%
Rye	4.0%	3.3%	3.1%	3.6%	5.4%	5.2%	4.9%	4.8%	0.8%	-0.1%
Seabrook	7.5%	6.2%	5.6%	6.8%	9.3%	8.0%	7.3%	8.1%	0.6%	0.8%
South Hampton	4.5%	3.5%	3.9%	4.2%	7.7%	4.9%	4.4%	6.5%	2.0%	2.1%
Stratham	4.0%	3.2%	3.2%	3.3%	5.0%	4.5%	4.6%	4.5%	0.5%	-0.1%
CEDS Eastern Towns	4.1%	3.5%	3.4%	3.8%	5.8%	5.4%	4.8%	5.2%	1.1%	0.4%
Atkinson	4.5%	3.5%	3.6%	5.2%	7.3%	6.6%	6.2%	5.8%	1.3%	-0.4%
Auburn	4.1%	3.1%	2.8%	3.1%	5.4%	5.0%	4.6%	4.3%	0.2%	-0.3%
Brentwood	4.8%	4.5%	4.4%	4.5%	6.8%	6.6%	6.1%	6.2%	1.4%	0.1%
Candia	3.8%	3.2%	3.1%	3.1%	4.9%	5.3%	4.3%	4.7%	0.9%	0.4%
Chester	5.5%	3.3%	3.4%	3.3%	5.3%	5.7%	5.2%	5.1%	-0.4%	-0.1%
Danville	6.3%	4.4%	4.7%	5.4%	8.1%	7.5%	7.2%	7.8%	1.5%	0.6%
Deerfield	4.2%	3.3%	3.9%	3.5%	6.0%	5.9%	4.5%	5.5%	1.3%	1.0%
Epping	4.6%	3.8%	3.9%	4.7%	7.4%	7.2%	6.2%	6.9%	2.3%	0.7%
Fremont	4.8%	3.9%	4.0%	4.5%	7.0%	7.0%	5.8%	6.5%	1.7%	0.7%
Hampstead	6.6%	4.4%	4.1%	5.0%	7.4%	7.0%	6.1%	6.7%	0.1%	0.6%
Kingston	6.7%	4.4%	4.8%	5.4%	7.6%	7.5%	7.0%	7.6%	0.9%	0.6%
Newton	6.9%	4.5%	4.1%	5.4%	7.5%	7.0%	6.8%	7.2%	0.3%	0.4%
Northwood	4.4%	3.5%	3.6%	4.0%	6.8%	6.1%	6.0%	7.5%	3.1%	1.5%
Nottingham	4.0%	3.2%	3.0%	3.4%	5.6%	5.0%	4.3%	4.6%	0.6%	0.3%
Plaistow	7.6%	4.9%	5.2%	5.8%	8.0%	7.4%	6.4%	7.5%	-0.1%	1.1%
Raymond	5.7%	4.0%	4.1%	4.6%	7.5%	7.0%	5.9%	5.9%	0.2%	0.0%
Sandown	6.8%	4.2%	4.0%	5.5%	7.8%	7.2%	6.8%	6.9%	0.1%	0.1%
CEDS Central Towns	5.4%	3.9%	3.9%	4.5%	6.8%	6.5%	5.8%	6.3%	0.9%	0.4%
Derry	6.4%	4.2%	4.0%	4.5%	6.9%	7.0%	6.1%	6.5%	0.1%	0.4%
Hudson	5.5%	3.8%	3.8%	4.2%	6.7%	6.6%	5.8%	6.1%	0.6%	0.3%
Litchfield	4.9%	3.2%	3.2%	3.6%	5.7%	6.1%	5.4%	5.3%	0.4%	-0.1%
Londonderry	5.3%	3.5%	3.5%	3.8%	5.9%	5.9%	5.2%	5.6%	0.3%	0.4%
Merrimack	4.7%	3.0%	3.0%	3.3%	5.8%	5.7%	4.9%	5.0%	0.3%	0.1%
Nashua	5.8%	4.0%	3.7%	4.1%	6.9%	6.7%	6.0%	6.2%	0.4%	0.2%
Pelham	7.3%	4.9%	5.0%	5.2%	8.2%	7.8%	7.1%	7.3%	0.0%	0.2%
Salem	7.2%	4.9%	5.0%	5.4%	8.0%	8.2%	7.3%	8.1%	0.9%	0.8%
Windham	6.3%	3.9%	3.7%	3.6%	6.1%	5.5%	5.1%	5.1%	-1.2%	0.0%
CEDS Western Towns	5.9%	3.9%	3.9%	4.2%	6.7%	6.6%	5.9%	6.1%	0.2%	0.3%
REDC CEDS region	5.0%	3.7%	3.7%	4.2%	6.4%	6.1%	5.5%	5.9%	0.8%	0.4%
Hillsborough County	4.9%	3.7%	3.6%	3.9%	5.6%	6.3%	5.5%	5.7%	0.8%	0.2%
Rockingham County	5.5%	3.9%	3.9%	4.3%	6.6%	6.3%	5.7%	6.0%	0.5%	0.3%
New Hampshire	4.5%	3.5%	3.5%	3.9%	6.2%	6.1%	5.4%	5.5%	1.0%	0.1%

* Unemployment rates shown are not seasonally adjusted

Source: NH Dept. Employ. Security - Economic & Labor Market Information Bureau: Local Area Unemployment Statistics (LAUS)

<http://nhetwork.nhes.state.nh.us/nhetwork>

Table C-5: Employment and Weekly Wages

Town/Area	Private Employers 2010				# of Employees, 2010				Private Employers 2011				# of Employees, 2011				Ave. Weekly Wage TOTAL Private + Gov't	
	Goods Prod.#	Service Prov.	Total		Goods Prod.#	Service Prov.*	Gov't.	Total + Gov	Goods Prod.#	Service Prov.	Total		Goods Prod.#	Service Prov.*	Gov't.	Total + Gov	2010	2011
East Kingston	10	23	104		26	78	86	190	12	26	38		32	86	90	209	\$661	\$874
Exeter	57	494	8,617		1,211	7,405	1,043	9,660	54	493	547		1,277	7,414	926	9,617	\$906	\$950
Greenland	n	n	1,928		n	n	121	2,049	36	125	160		376	1,485	138	2,000	\$868	\$886
Hampton	53	453	4,320		707	3,613	1,098	5,416	52	452	503		719	3,636	1,028	5,383	\$885	\$890
Hampton Falls	11	62	313		77	236	100	413	8	73	81		62	345	90	497	\$670	\$590
Kensington	9	37	211		24	187	67	278	8	31	39		25	182	64	271	\$825	\$845
New Castle	n	n	n		n	n	48	n	n	n	29		n	n	43	328	n	\$603
Newfields	11	39	583		273	310	74	657	13	43	55		257	305	70	632	\$709	\$740
Newington	15	180	4,432		1,067	3,365	75	4,507	16	176	192		1,075	3,215	86	4,376	\$671	\$689
Newmarket	25	110	891		239	653	345	1,237	27	110	137		258	654	332	1,243	\$734	\$767
North Hampton	38	221	2,262		176	2,086	91	2,353	36	235	271		189	2,057	92	2,338	\$749	\$739
Portsmouth	125	1,566	25,876		2,289	23,587	1,966	27,842	121	1,591	1,765		2,286	24,316	1,966	28,568	\$1,039	\$1,048
Rye	n	n	n		n	n	237	n	n	n	161		n	n	220	1,239	n	\$710
Seabrook	56	246	5,407		995	4,412	545	5,951	53	244	297		1,094	4,407	527	6,027	\$877	\$978
South Hampton	8	24	94		28	66	37	131	8	23	31		28	56	35	119	\$776	\$801
Stratham	25	230	3,372		556	2,816	375	3,747	29	222	251		609	2,801	346	3,756	\$1,050	\$1,446
CEDS Eastern Towns	443	3,685	58,410		7,668	48,814	6,308	64,431	473	3,844	4,557		8,287	50,959	6,053	66,603	\$816	\$847
Atkinson	29	86	884		242	642	65	949	30	84	113		286	608	65	958	\$863	\$883
Auburn	46	85	1,431		514	917	158	1,588	42	86	128		534	896	154	1,583	\$727	\$769
Brentwood	36	89	965		291	674	835	1,799	34	90	124		282	911	821	2,014	\$861	\$804
Candia	26	67	604		251	353	113	717	25	74	98		253	388	121	763	\$741	\$743
Chester	24	58	327		78	250	198	525	21	52	73		71	394	172	636	\$629	\$616
Danville	13	25	102		43	59	59	160	13	28	42		42	64	54	160	\$579	\$662
Deerfield	15	50	295		88	207	51	346	17	50	66		101	210	52	363	\$597	\$630
Epping	24	125	1,977		98	1,879	372	2,349	26	126	152		104	1,955	365	2,424	\$605	\$594
Fremont	20	40	572		93	479	132	704	19	41	61		92	290	124	506	\$550	\$641
Hampstead	53	203	2,136		468	1,669	101	2,238	53	200	253		472	1,651	98	2,221	\$705	\$693
Kingston	32	116	1,119		92	1,026	322	1,441	32	119	151		106	1,019	308	1,432	\$641	\$657
Newton	12	37	283		115	168	180	463	12	40	52		109	171	185	465	\$772	\$759
Northwood	31	61	803		160	643	212	1,015	32	62	94		159	646	192	996	\$628	\$672
Nottingham	17	27	115		56	58	155	270	13	32	46		49	84	153	286	\$783	\$752
Plaistow	54	287	3,532		444	3,087	1,076	4,608	52	283	335		478	30,664	1,073	4,615	\$631	\$651
Raymond	30	139	2,265		264	2,002	423	2,689	33	144	177		295	1,958	406	2,659	\$769	\$831
Sandown	18	33	189		48	141	68	257	16	35	52		45	143	63	251	\$592	\$608
CEDS Central Towns	480	1,528	17,599		3,345	14,254	4,520	22,118	470	1,546	2,017		3,478	42,052	4,406	22,332	\$687	\$704
Derry	90	527	6,476		730	5,746	1,070	7,546	85	513	597		672	5,856	1,022	7,550	\$765	\$777
Hudson	157	445	602		4,403	4,945	926	10,274	159	454	613		4,502	5,073	887	10,462	\$988	\$1,031
Litchfield	24	56	80		189	297	340	826	22	60	83		180	303	336	819	\$818	\$791
Londonderry	136	654	12,136		4,061	8,075	1,170	13,306	133	648	781		4,045	8,155	1,146	13,346	\$979	\$869
Merrimack	94	550	13,515		3,158	10,358	1,171	14,687	100	556	656		3,036	10,567	1,165	14,768	\$1,422	\$1,682
Nashua	277	2,336	46,484		7,835	35,649	4,654	48,137	274	2,353	2,627		7,838	36,201	4,591	48,631	\$1,008	\$1,023
Pelham	68	186	1,697		561	1,136	486	2,183	65	180	245		578	1,108	473	2,159	\$782	\$799
Salem	150	1,066	18,504		2,116	16,388	1,236	19,740	140	1,082	1,222		2,066	17,255	1,230	20,552	\$789	\$813
Windham	55	303	2,666		348	2,318	509	3,175	52	310	362		356	2,197	512	30,665	\$849	\$827
CEDS Western Towns	1,051	6,123	102,160		23,401	84,912	11,562	119,874	1,030	6,156	7,186		23,273	86,715	11,362	148,952	\$933	\$957
REDC Region	1,974	11,336	178,169		34,414	147,980	22,390	206,423	1,973	11,546	13,760		35,038	179,726	21,821	237,887	\$787	\$813
Hillsborough County	1,586	9,194	10,780		32,117	130,712	21,799	184,628	1,569	9,244	10,873		32,694	132,336	21,407	186,437	\$981	\$1,014
Rockingham County	1,411	8,044	9,455		18,689	98,391	14,813	131,892	1,371	8,108	9,479		18,941	100,138	14,366	133,444	\$862	\$881
New Hampshire	6,055	35,740	513,386		89,428	423,597	87,154	600,540	5,941	36,191	42,132		90,996	429,342	85,527	605,864	\$884	\$909

Data Source: Profile of New Hampshire's Counties, Cities, Towns and Unincorporated Places, NH Employment Security

Table C-6: Civilian Labor Force and Employment:Hillsborough & Rockingham Counties, New Hampshire, and New England

C-6 Civilian Labor Force and Employment: Hillsborough & Rockingham Counties, New Hampshire and New England

2013 CEDS Update

REGION/STATE (in thousands)	2007				2008				2009			
	Civilian Labor Force	Employed	Un-employed	Unempl. Rate (%)	Civilian Labor Force	Employed	Un-employed	Unempl. Rate (%)	Civilian Labor Force	Employed	Un-employed	Unempl. Rate (%)
<i>Hillsborough County</i>	228.7	220.5	8.1	3.6	229.0	220.1	8.9	3.9	229.9	215.0	14.9	6.5
<i>Rockingham County</i>	173.9	167.2	6.7	3.9	173.8	166.4	7.4	4.2	174.8	163.2	11.6	6.6
<i>New Hampshire</i>	738.0	712.0	26.0	3.5	743.0	715.0	28.0	3.8	745.0	698.0	47.0	6.3
Connecticut	1,865.0	1,780.0	85.0	4.6	1,891.0	1,782.0	109.0	5.7	1,887.0	1,730.0	157.0	8.3
Maine	705.0	671.0	33.0	4.7	707.0	669.0	38.0	5.4	698.0	641.0	57.0	8.2
Massachusetts	3,408.0	3,256.0	153.0	4.5	3,421.0	3,238.0	183.0	5.3	3,477.0	3,190.0	286.0	8.2
Rhode Island	577.0	548.0	29.0	5.0	567.0	522.0	45.0	7.9	566.0	505.0	61.0	10.8
Vermont	354.0	340.0	14.0	3.7	354.0	336.0	17.0	4.9	360.0	335.0	25.0	6.9
New England	7,648.0	7,307.0	340.0	4.4	7,633.0	7,254.0	415.0	5.4	7,733.0	7,100.0	633.0	8.2
United States	153,124	146,047	7,078	4.6	154,287	145,362	8,924	5.8	154,142	139,877	14,265	9.3
REGION/STATE (in thousands)	2010				2011				2012			
	Civilian Labor Force	Employed	Un-employed	Unempl. Rate (%)	Civilian Labor Force	Employed	Un-employed	Unempl. Rate (%)	Civilian Labor Force	Employed	Un-employed	Unempl. Rate (%)
<i>Hillsborough County</i>	229.2	214.7	14.4	6.3	228.4	215.7	12.7	5.5	229.5	216.4	13.0	5.7
<i>Rockingham County</i>	176.0	165.0	11.0	6.3	174.9	165.0	9.9	5.7	176.6	166.0	10.6	6.0
<i>New Hampshire</i>	744.0	699.0	45.0	6.1	738.0	698.0	40.0	5.4	742.0	701.0	41.0	5.5
Connecticut	1,897.0	1,724.0	173.0	9.1	1,902.0	1,749.0	169.0	8.8	1,879.0	1,722.0	157.0	8.4
Maine	697.0	642.0	55.0	7.9	704.0	651.0	53.0	7.5	706.0	655.0	52.0	7.3
Massachusetts	3,494.0	3,197.0	297.0	8.5	3,470.0	3,202.0	254.0	7.4	3,475.0	3,242.0	234.0	6.7
Rhode Island	576.0	509.0	67.0	11.6	563.0	500.0	63.0	11.3	560.0	502.0	58.0	10.4
Vermont	361.0	338.0	22.0	6.2	359.0	339.0	20.0	5.6	356.0	339.0	18.0	5.0
New England	7,770.0	7,109.0	660.0	8.5	7,735.0	7,140.0	599.0	7.7	7,720.0	7,161.0	560.0	7.2
United States	153,889	139,064	14,825	9.6	153,617	139,869	13,747	8.9	154,975	142,469	12,506	8.1

Source: NH Employment Security, US Bureau of Labor Statistics.

Table E-1: Property Valuation and Taxes

Town/Area	Total Population 2011	Property Valuation and Taxes (excluding State School Tax portion)			
		2011 Total Equalized Valuation	2011 Valuation per Capita	Full Value Tax Rate	State Rank (1=lowest)
East Kingston	2,363	\$ 291,478,979	\$ 123,351	\$ 23.65	159
Exeter	14,354	\$ 1,604,981,473	\$ 111,814	\$ 24.60	172
Greenland	3,586	\$ 669,430,920	\$ 186,679	\$ 13.68	39
Hampton	14,868	\$ 2,813,332,466	\$ 189,221	\$ 17.21	62
Hampton Falls	2,235	\$ 434,772,900	\$ 194,529	\$ 19.72	89
Kensington	2,121	\$ 293,560,055	\$ 138,406	\$ 22.10	129
New Castle	967	\$ 636,733,622	\$ 658,463	\$ 6.38	5
Newfields	1,678	\$ 259,375,642	\$ 154,574	\$ 21.90	125
Newington	753	\$ 971,307,945	\$ 1,289,918	\$ 7.68	7
Newmarket	8,950	\$ 718,640,197	\$ 80,295	\$ 26.23	189
North Hampton	4,324	\$ 1,016,338,240	\$ 235,046	\$ 15.92	50
Portsmouth	21,206	\$ 4,174,795,440	\$ 196,869	\$ 16.33	53
Rye	5,324	\$ 1,770,040,629	\$ 332,464	\$ 10.55	17
Seabrook	8,697	\$ 2,597,699,164	\$ 298,689	\$ 13.67	38
South Hampton	813	\$ 141,919,372	\$ 174,563	\$ 16.65	55
Stratham	7,245	\$ 1,111,316,215	\$ 153,391	\$ 20.46	98
CEDS Eastern Towns	99,484	\$ 19,505,723,259	\$ 196,069	\$ 17.30	NA
Atkinson	6,741	\$ 842,492,003	\$ 124,980	\$ 18.60	75
Auburn	4,974	\$ 650,691,558	\$ 130,819	\$ 17.56	66
Brentwood	4,497	\$ 474,545,987	\$ 105,525	\$ 23.28	150
Candia	3,913	\$ 408,258,374	\$ 104,334	\$ 19.19	80
Chester	4,762	\$ 454,524,525	\$ 95,448	\$ 25.54	170
Danville	4,424	\$ 330,590,251	\$ 74,727	\$ 27.47	198
Deerfield	4,308	\$ 470,036,974	\$ 109,108	\$ 24.12	165
Epping	6,501	\$ 59,791,114	\$ 9,197	\$ 25.09	179
Fremont	4,316	\$ 361,617,075	\$ 83,785	\$ 27.36	197
Hampstead	8,526	\$ 958,212,000	\$ 112,387	\$ 22.96	145
Kingston	6,010	\$ 646,269,736	\$ 107,532	\$ 22.69	137
Newton	4,661	\$ 429,491,608	\$ 92,146	\$ 26.13	187
Northwood	4,235	\$ 459,035,795	\$ 108,391	\$ 25.17	180
Nottingham	4,813	\$ 561,459,577	\$ 116,655	\$ 19.31	85
Plaistow	7,584	\$ 878,755,744	\$ 115,870	\$ 23.22	148
Raymond	10,185	\$ 819,796,643	\$ 80,491	\$ 22.72	139
Sandown	6,076	\$ 523,254,664	\$ 86,118	\$ 23.55	155
CEDS Central Towns	96,526	\$ 9,328,823,628	\$ 96,646	\$ 23.17	NA
Derry	33,008	\$ 2,521,677,930	\$ 76,396	\$ 26.86	194
Hudson	24,514	\$ 2,553,941,272	\$ 104,183	\$ 18.84	77
Litchfield	8,275	\$ 777,116,551	\$ 93,911	\$ 18.50	72
Londonderry	24,132	\$ 2,939,013,127	\$ 121,789	\$ 22.96	145
Merrimack	25,454	\$ 1,765,309,128	\$ 69,353	\$ 23.62	158
Nashua	86,366	\$ 8,248,187,902	\$ 95,503	\$ 21.53	116
Pelham	12,894	\$ 1,400,587,204	\$ 108,623	\$ 20.97	104
Salem	28,702	\$ 3,805,084,222	\$ 132,572	\$ 20.15	94
Windham	13,756	\$ 2,068,807,422	\$ 150,393	\$ 22.57	133
CEDS Western Towns	257,101	\$ 26,079,724,758	\$ 101,438	\$ 21.78	NA
Hillsborough County	400,797	\$ 38,560,332,775	\$ 96,209	\$ 21.62	NA
Rockingham County	295,608	\$ 40,557,292,929	\$ 137,200	\$ 19.69	NA
New Hampshire	1,318,000	\$ 154,348,551,055	\$ 117,108	\$ 20.46	NA

Source: N.H. Department of Revenue Administration (comparison of effective tax rates);
2010 Population from US Census Bureau

Table F-1: ACS data: Median Household Income

Table F-1: ACS data - Median Household Income													2013 CEDS Update
Median household income in the past 12 months (in 2011 inflation-adjusted dollars)													
PLACE	Total Number HOUSEHOLDS	Median household income	Number households Less than \$20,000	Number households \$20,000 to \$34,999	Number households \$35,000 to \$49,999	Number households \$50,000 to \$74,999	Number households \$75,000 to \$99,999	Number households \$100,000 to \$124,999	Number households \$125,000 to \$149,999	Number households \$150,000 to \$199,999	Number households \$200,000 or more		
East Kingston town	870	\$ 84,625	84	64	61	152	130	91	106	106	76		
Exeter town	6,182	\$ 68,777	581	1,105	615	1,133	852	657	424	349	466		
Greenland town	1,355	\$ 79,205	66	92	88	409	172	139	59	118	212		
Hampton town	6,922	\$ 70,225	759	768	852	1,308	1,086	651	466	495	537		
Hampton Falls town	835	\$ 114,375	50	45	42	80	90	134	109	141	144		
Kensington town	741	\$ 99,063	14	65	82	114	97	94	90	96	89		
New Castle town	428	\$ 103,462	17	43	57	42	50	38	48	21	112		
Newfields town	594	\$ 123,333	24	27	56	72	57	67	60	104	127		
Newington town	283	\$ 81,458	5	43	16	72	66	24	24	28	5		
Newmarket town	3,688	\$ 62,333	534	404	569	635	557	312	272	256	149		
North Hampton town	1,764	\$ 75,268	89	239	220	325	246	186	84	184	191		
Portsmouth city	9,992	\$ 64,459	1,422	1,273	1,108	2,024	1,247	1,266	518	572	562		
Rye town	2,299	\$ 89,297	146	197	149	409	391	306	127	255	319		
Seabrook town	3,905	\$ 54,359	679	671	473	874	371	364	208	138	127		
South Hampton town	289	\$ 86,528	28	26	27	50	43	17	32	30	36		
Strafford town	2,673	\$ 118,015	114	233	126	329	249	402	379	443	398		
CEDS Eastern Towns	42,820	\$ 73,949	4,612	5,295	4,541	8,028	5,704	4,748	3,006	3,336	3,550		
Atkinson town	2,642	\$ 81,515	259	299	236	399	367	340	272	215	255		
Auburn town	1,705	\$ 92,938	80	146	169	228	262	256	163	327	74		
Brentwood town	1,217	\$ 110,250	28	63	65	132	278	148	170	119	214		
Candia town	1,448	\$ 94,755	80	77	163	202	268	219	233	152	54		
Chester town	1,551	\$ 102,527	40	167	39	231	276	310	195	123	170		
Danville town	1,545	\$ 80,665	120	102	174	282	349	248	121	138	11		
Deerfield town	1,487	\$ 85,815	40	120	162	293	259	183	216	125	89		
Epping town	2,487	\$ 72,969	222	361	201	518	503	241	263	154	24		
Fremont town	1,486	\$ 79,884	94	133	87	343	354	280	85	104	6		
Hampstead town	3,387	\$ 86,955	351	421	194	628	442	328	411	375	237		
Kingston town	2,281	\$ 69,341	114	252	417	488	383	287	119	155	66		
Newton town	1,679	\$ 87,610	90	166	231	158	336	357	223	91	27		
Northwood town	1,753	\$ 65,465	115	230	275	385	257	310	82	62	37		
Nottingham town	1,750	\$ 99,394	22	127	118	343	273	426	244	156	41		
Plaistow town	3,016	\$ 72,869	203	312	380	665	422	481	265	142	146		
Raymond town	3,893	\$ 66,438	406	377	618	894	670	458	138	245	87		
Sandown town	1,924	\$ 84,537	139	158	137	405	368	199	154	197	167		
CEDS Central Towns	35,251	\$ 81,875	2,403	3,511	3,666	6,594	6,067	5,071	3,354	2,880	1,705		
Derry town	12,773	\$ 69,477	1,424	1,668	1,771	1,862	1,890	1,662	1,046	1,039	411		
Hudson town	8,808	\$ 84,304	508	712	1,047	1,684	1,636	1,254	732	645	590		
Litchfield town	2,730	\$ 103,932	159	102	255	456	456	583	434	265	201		
Londonderry town	8,507	\$ 92,438	413	636	819	1,302	1,287	1,449	930	866	805		
Merrimack town	9,421	\$ 91,200	458	705	903	1,805	1,325	1,339	1,064	1,203	619		
Nashua city	35,220	\$ 66,074	5,105	4,342	4,130	6,070	5,237	3,754	2,345	2,765	1,472		
Pelham town	4,275	\$ 96,210	285	194	450	697	673	686	456	433	401		
Salem town	11,194	\$ 73,010	1,062	1,232	1,558	1,905	1,851	1,083	823	931	749		
Windham town	4,560	\$ 117,402	170	254	334	547	486	672	484	839	774		
CEDS Western Towns	97,488	\$ 78,475	9,584	9,845	11,267	16,328	14,660	12,482	8,314	8,986	6,022		
CEDC Region	175,559	\$ 78,054	16,599	18,651	19,474	30,950	26,431	22,301	14,674	15,202	11,277		
Hillsborough County	153,471	\$ 70,591	17,704	17,676	17,904	28,285	23,268	17,228	11,078	11,530	8,798		
Rockingham County	115,105	\$ 77,470	10,084	12,596	12,689	20,238	17,285	14,685	9,643	9,991	7,994		
New Hampshire	514,869	\$ 64,664	62,895	68,170	66,611	97,963	75,254	53,049	33,151	32,118	25,658		
United States	114,761,359	\$ 52,762	20,426,914	18,018,142	15,837,068	21,001,329	14,230,409	7,287,201	7,287,492	5,393,784	5,164,261		

Data Source: US Census Bureau, American Community Survey

CEDS Subregion and Region Median Incomes are weighted averages.

Data Source: US Census Bureau, American Community Survey
CEDS Subregion and Region Median Incomes are weighted averages.

Table F-2: ACS data: Education Attainment

PLACE	Total Male Population 18 years and over:	Males with Less than 9th grade	Males with 9th to 12th grade, no diploma	Males with High school graduate, GED, or alternative	Males with Some college, no degree	Males with Associate's degree	Males with Bachelor's degree	Males with Graduate or professional degree
East Kingston town	861	3	45	209	184	67	250	103
Exeter town	4991	61	334	1079	844	295	1328	1050
Greenland town	1377	0	86	336	291	61	367	236
Hampton town	6182	59	384	1484	1480	419	1719	637
Hampton Falls town	825	12	21	169	117	49	262	195
Kensington town	749	3	23	211	147	98	177	90
New Castle town	407	3	0	83	35	20	135	131
Newfields town	610	5	27	98	115	32	212	121
Newington town	313	3	10	68	82	23	78	49
Newmarket town	3405	39	188	692	879	311	939	357
North Hampton town	1553	7	103	327	252	125	436	303
Portsmouth city	8390	136	247	1886	1561	595	2585	1380
Rye town	2094	24	60	450	407	114	659	380
Seabrook town	3763	286	293	1758	756	185	356	129
South Hampton town	281	3	11	60	74	19	72	42
Stratham town	2624	28	113	223	429	164	1122	545
CEDS Eastern Towns	38425	672	1945	9133	7653	2577	10697	5748
Atkinson town	2499	0	72	540	609	218	725	335
Auburn town	1864	38	116	533	461	212	296	208
Brentwood town	1659	26	178	482	244	137	432	160
Candia town	1564	7	59	586	279	196	303	134
Chester town	1714	17	92	543	260	116	478	208
Danville town	1608	59	145	577	289	139	264	135
Deerfield town	1564	27	155	576	189	185	265	167
Epping town	2416	91	230	688	608	160	338	301
Fremont town	1541	58	66	557	283	131	307	139
Hampstead town	3099	37	283	823	621	284	626	425
Kingston town	2088	59	197	674	497	156	414	91
Newton town	1682	55	115	556	377	165	207	207
Northwood town	1793	28	118	631	460	125	307	124
Nottingham town	1846	5	132	440	475	147	436	211
Plaistow town	2797	84	97	1224	479	240	442	231
Raymond town	3919	122	472	1435	756	264	807	63
Sandown town	2090	19	58	799	598	161	229	226
CEDS Central Towns	35743	732	2585	11664	7485	3036	6876	3365
Derry town	12586	232	1061	4393	2921	694	2225	1060
Hudson town	9095	215	563	2635	2138	787	2014	743
Litchfield town	3058	21	96	752	911	230	771	277
Londonderry town	8583	72	382	2276	1684	732	2137	1300
Merrimack town	9611	177	495	2443	1821	911	2682	1082
Nashua city	32547	1371	2519	8630	6417	2678	6908	4024
Pelham town	4576	171	154	1511	1265	247	850	378
Salem town	10951	289	687	3376	2587	1055	2028	929
Windham town	4698	28	189	932	859	375	1396	919
CEDS Western Towns	95705	2576	6146	26948	20603	7709	21011	10712
REDC Region	169873	3980	10676	47745	35741	13322	38584	19825
Hillsborough County	149431	4713	11171	41891	30271	12145	31709	17531
Rockingham County	110986	2025	6849	31774	23189	8469	25359	13321
New Hampshire	500141	14243	37943	152745	105205	38200	96536	55269

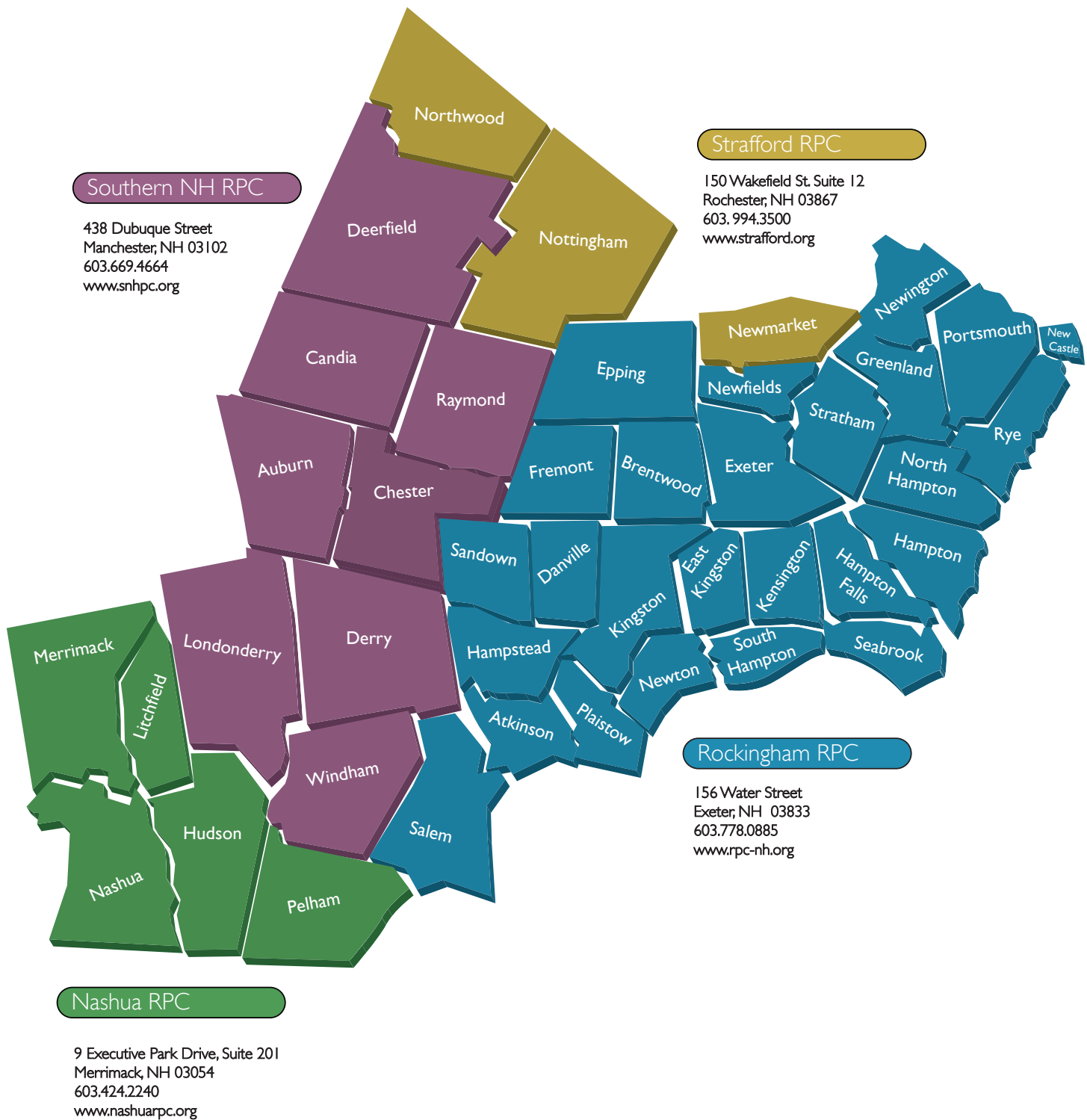
Data Source: US Census Bureau, American Community Survey, 2007-2011

Table F-2: ACS data: Education Attainment (continued)

PLACE	Total Female Population 18 years and over:	Females with Less than 9th grade	Females with 9th to 12th grade, no diploma	Females with High school graduate, GED, or alternative	Females with Some college, no degree	Females with Associate's degree	Females with Bachelor's degree	Females with Graduate or professional degree
East Kingston town	946	5	23	307	198	102	178	133
Exeter town	6220	92	275	1310	1013	773	1519	1238
Greenland town	1290	5	50	300	275	102	293	265
Hampton town	6629	78	342	1706	1291	698	1548	966
Hampton Falls town	828	5	18	188	126	72	246	173
Kensington town	771	8	45	205	131	100	192	90
New Castle town	424	0	8	55	40	36	137	148
Newfields town	617	5	14	116	73	74	240	95
Newington town	285	8	0	76	60	26	71	44
Newmarket town	3554	38	140	824	835	318	887	512
North Hampton town	1798	20	92	310	462	226	398	290
Portsmouth city	9186	128	280	2157	1562	750	2827	1482
Rye town	2306	18	30	492	273	343	732	418
Seabrook town	3511	59	346	1397	936	248	319	206
South Hampton town	304	2	26	74	83	25	64	30
Stratham town	2637	0	32	562	478	281	937	347
CEDS Eastern Towns	41306	471	1721	10079	7836	4174	10588	6437
Atkinson town	2704	30	45	720	531	336	683	359
Auburn town	1780	35	49	578	316	148	475	179
Brentwood town	1552	20	33	434	269	212	402	182
Candia town	1581	0	65	556	322	223	255	160
Chester town	1671	14	97	382	442	215	387	134
Danville town	1536	0	71	502	376	190	294	103
Deerfield town	1641	23	91	406	390	159	408	164
Epping town	2515	46	158	841	490	337	373	270
Fremont town	1529	21	122	446	327	243	289	81
Hampstead town	3500	25	235	852	766	473	766	383
Kingston town	2547	0	175	916	510	320	385	241
Newton town	1712	22	57	480	570	243	233	107
Northwood town	1560	0	53	526	444	132	225	180
Nottingham town	1731	13	116	330	305	243	442	282
Plaistow town	2929	49	129	904	694	287	501	365
Raymond town	3858	52	297	1467	888	369	536	249
Sandown town	2189	0	56	539	655	408	419	112
CEDS Central Towns	36535	350	1849	10879	8295	4538	7073	3551
Derry town	12910	137	717	4153	2703	1721	2561	918
Hudson town	9221	185	379	2743	2096	995	1741	1082
Litchfield town	2915	116	144	651	609	418	571	406
Londonderry town	8696	89	255	2298	1647	1308	2027	1072
Merrimack town	9785	60	560	2397	1720	1311	2524	1213
Nashua city	34547	1376	2209	9515	7533	3227	7151	3536
Pelham town	4709	59	183	1487	903	569	1158	350
Salem town	11350	359	737	3516	2399	1321	2065	953
Windham town	4906	68	171	1032	782	340	1523	990
CEDS Western Towns	99039	2449	5355	27792	20392	11210	21321	10520
REDC Region	176880	3270	8925	48750	36523	19922	38982	20508
Hillsborough County	155838	5411	9301	43578	33147	15478	32782	16141
Rockingham County	115703	1474	5450	31957	23662	13402	25837	13921
New Hampshire	524870	12569	29805	152066	117432	53136	105171	54691

Data Source: US Census Bureau, American Community Survey, 2007-2011

Map A-1: Regional Planning Commissions



REDC CEDS Region

REDC BOARD OF DIRECTORS

Executive Committee

Warren Henderson, Chairman of the Board – Mr. Henderson is the former Chairman of the NH Republican Party, as well as a former Rockingham County Commissioner. Mr. Henderson has served on many Boards and Commissions over the years and is an original incorporator of REDC.

Wesley Moore, Vice Chairman of the Board – Mr. Moore is an entrepreneur who has started several successful NH businesses. Most recently, he has spent his time developing iPlayer HD, a video hosting service company. Mr. Moore served as a volunteer fire fighter and is a former Newfields NH Selectman. He is an original incorporator of REDC.

Paul Deschaine, Secretary – Mr. Deschaine served as REDC's Treasurer for many years before transitioning to Secretary. He is the long time Town Administrator for Stratham NH and is an active volunteer within the community. Mr. Deschaine is also an original incorporator of REDC.

William Davis, Treasurer – Mr. Davis is a Lieutenant Colonel in the New Hampshire Air National Guard and is the commander of the 157th Logistics Squadron at Pease Air National Guard Base as well as Chief of the NH National Guard's Congressional Affairs Contact Team. Mr. Davis was Newfields' Town and School Moderator for 13 years and has also served on the Board of Directors for Leadership Seacoast.

Board Members

Robert McDonald – Mr. McDonald is a Senior Credit Officer with Sovereign Bank and serves on the REDC Loan Committee. He is also actively involved in local economic development in NH as a long-time member of the Londonderry Housing and Redevelopment Authority.

David Bickford – Mr. Bickford recently retired from Public Service of NH (PSNH), as the Director of Customer Operations. He has also served the Region as a Board Member of the Greater Portsmouth Chamber of Commerce, Seacoast Family YMCA, and the Town of Dover Chamber. Also, Mr. Bickford is a graduate of Leadership Seacoast and Leadership NH.

George Sioras – Mr. Sioras is the Planning and Community Development Director for the Town of Derry NH. He works closely with Derry businesses to facilitate economic development as well as acts as a liaison for the Derry Revolving Loan Fund (DRLF), which REDC helps run. Mr. Sioras is also on the Board of Directors of CART (Greater Derry-Salem Cooperative Alliance for Regional Transportation). CART is a non-profit public transit agency serving towns in the Derry-Salem area which provides access to medical care, employment, and other basic life needs for transit dependent individuals.

Scott Zeller Esq. – Mr. Zeller is an entrepreneur who has started several local companies. He has used his background in law to aid local non-profits, such as the NH Music Chamber, with their formation. Each year Mr. Zeller travels to El Salvador to donate his time through the charitable organization Friends of ASAPROSAR (FoA), which provides critical eye care services to the local population. Mr. Zeller also served on the REDC Loan Committee for several years and sits on the board for a private charitable foundation based out of Las Vegas NV.

Thomas Conaton – Mr. Conaton is the Senior Commercial Relationship Manager for Hampshire First Bank (NBT) and a member of the REDC Loan Committee. In addition to serving on the REDC Board, he has served on the Board of the SEE Science Center and the Home Health & Hospice Care. Mr. Conaton is also a 2012 Graduate of the Greater Manchester Leadership Program.

Carol Estes – Carol Estes is the Vice President of Commercial Lending for Optima Bank & Trust, as well as a member of the REDC Loan Committee. Ms. Estes was also the NH SBA 504 Lender of the Year for 2010 & 2012. In addition, Ms. Estes is actively involved with NH Workforce Housing Charettes and the United Way of the Greater Seacoast.

The Regional Economic Development Center is a non-profit regional Development Corporation located in Southern New Hampshire. REDC Serves new, growing, and challenged businesses within our service territory. Whether you need to find a lending partner, finance an expansion, or need assistance with restructuring, REDC can help. REDC assists municipalities with strategic planning, economic development training, and assistance with infrastructure projects through the Comprehensive Economic Development Strategy (CEDS).



37 Industrial Drive, Suite F2
Exeter, NH 03833
603-772-2655
www.redc.com