



Where Goes New Hampshire? New Hampshire 2018

Sponsored by *BusinessNH Magazine* and Leadership New Hampshire

Steve Norton

Executive Director

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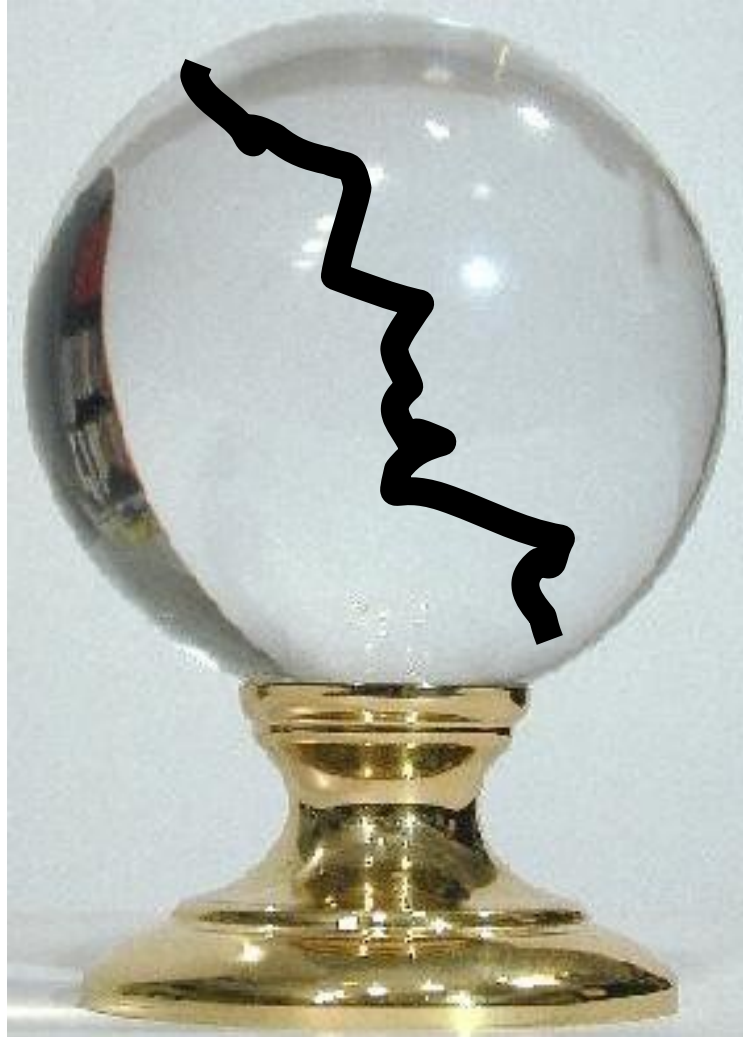
March 11, 2008

“...to raise new ideas and improve policy debates through quality information and analysis on issues shaping New Hampshire’s future.”

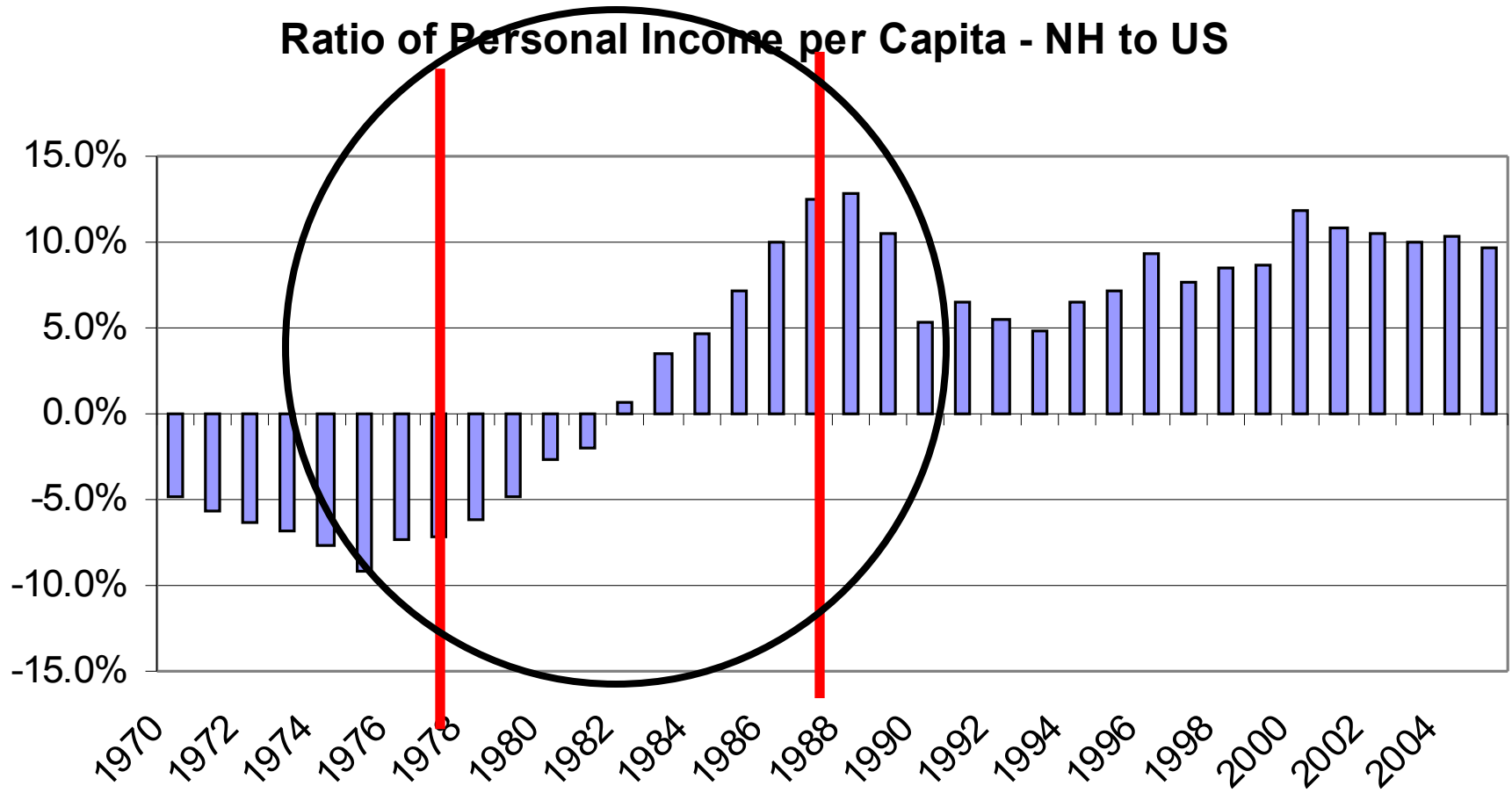


What is NH?

What Will NH Be in 2018?



The New Hampshire Revolution: NH Income per person grew faster than US in 1970-80's.

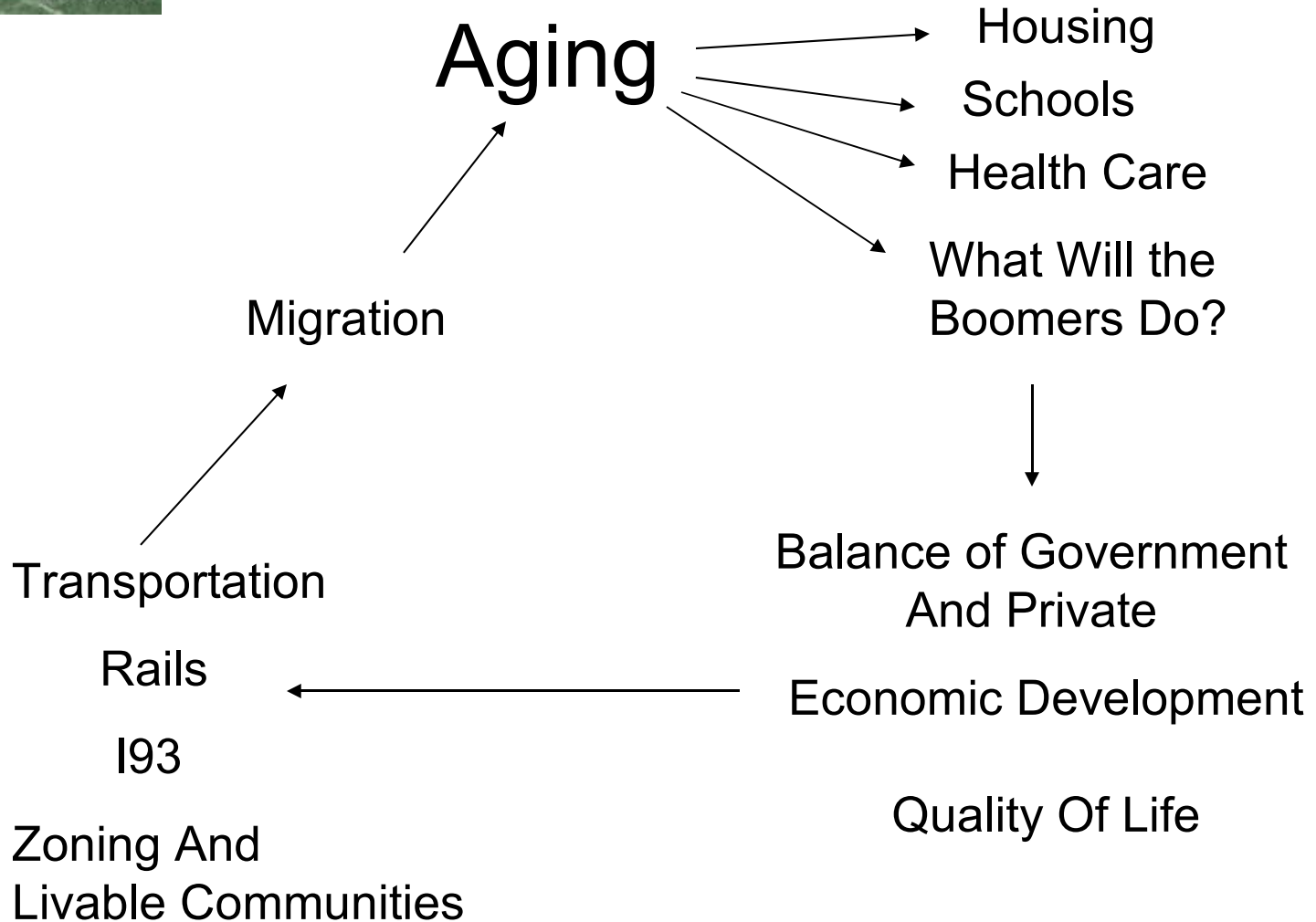


Source: US Bureau of Economic Analysis

Macro Trends

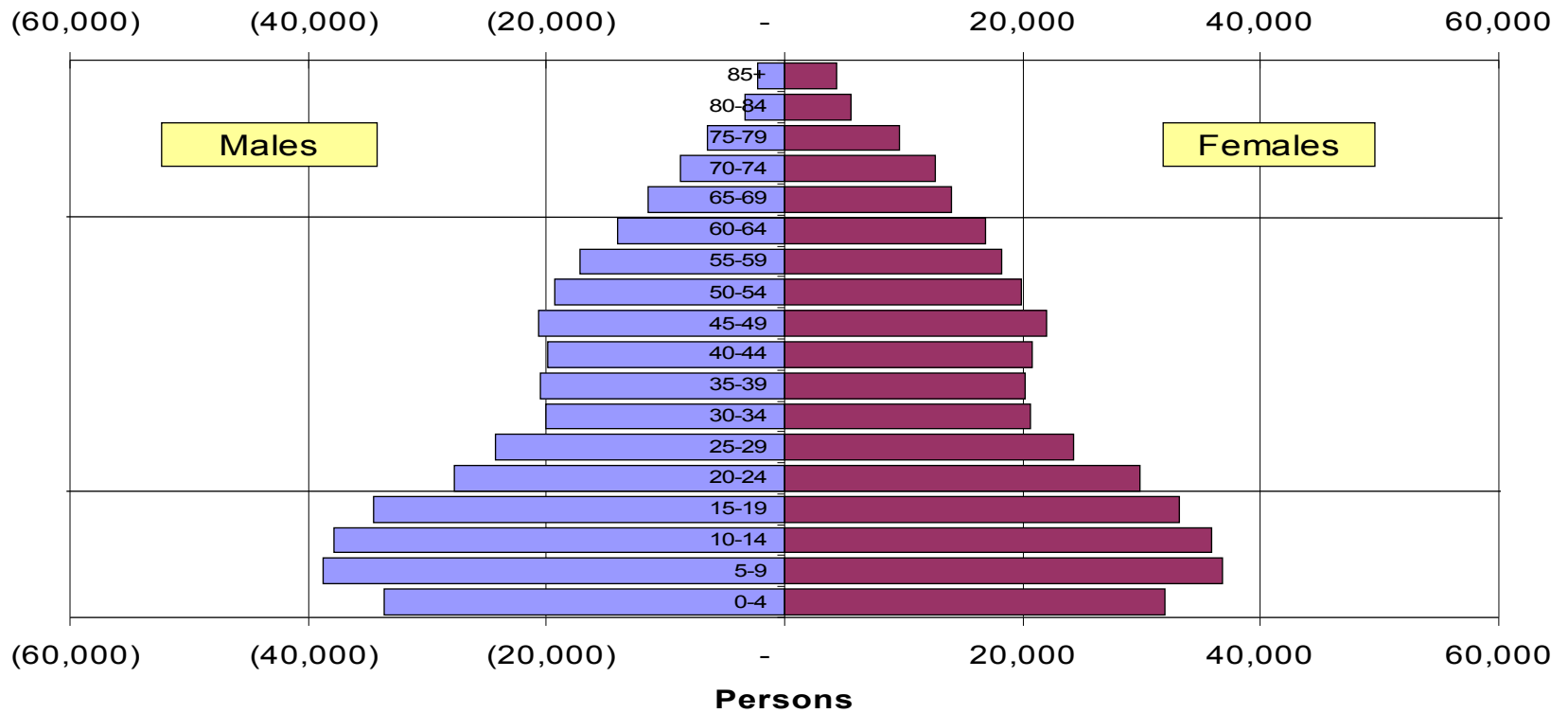
- Aging
 - People are getting older, fewer children
- Economic Change
 - Agriculture -> Manufacturing -> ?
- The World is Flat
 - Information, Communication, Transportation
- Environmental Change
 - Climate, Water, Conservation
- Migration
- Role of Towns in Shaping New Hampshire

It's A System, Not Static



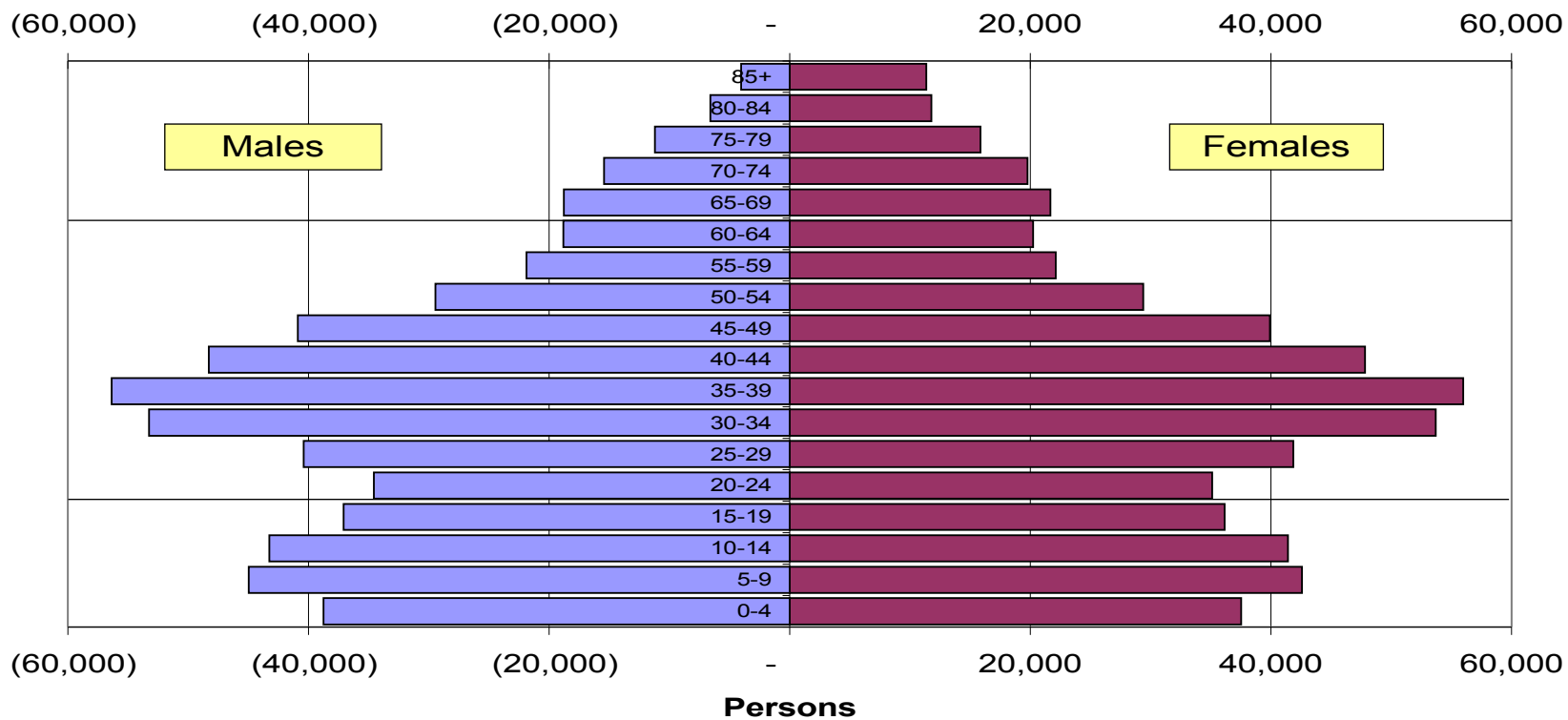
Age Distribution: 1970

Distribution of NH Population by Age in 1970



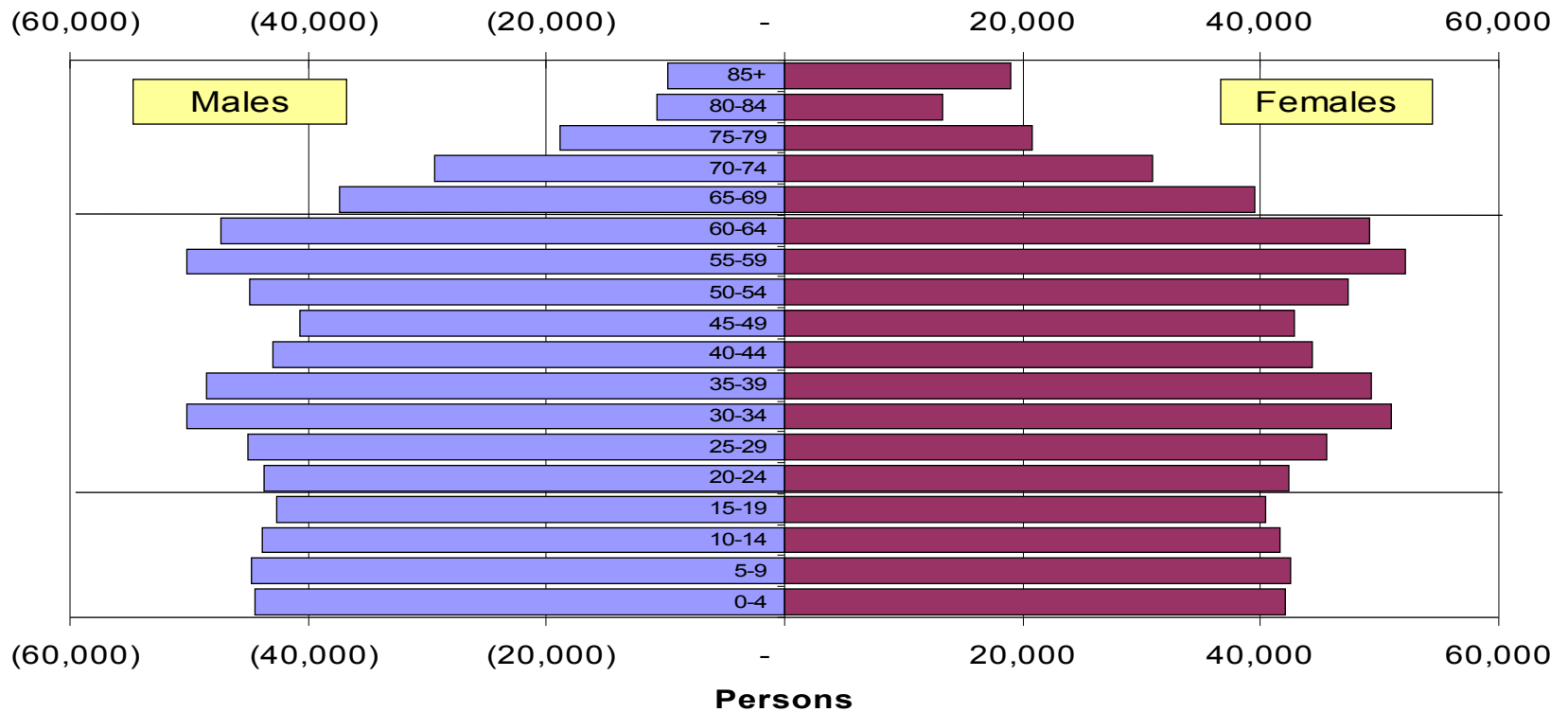
Age Distribution: 1995

Distribution of NH Population by Age in 1995



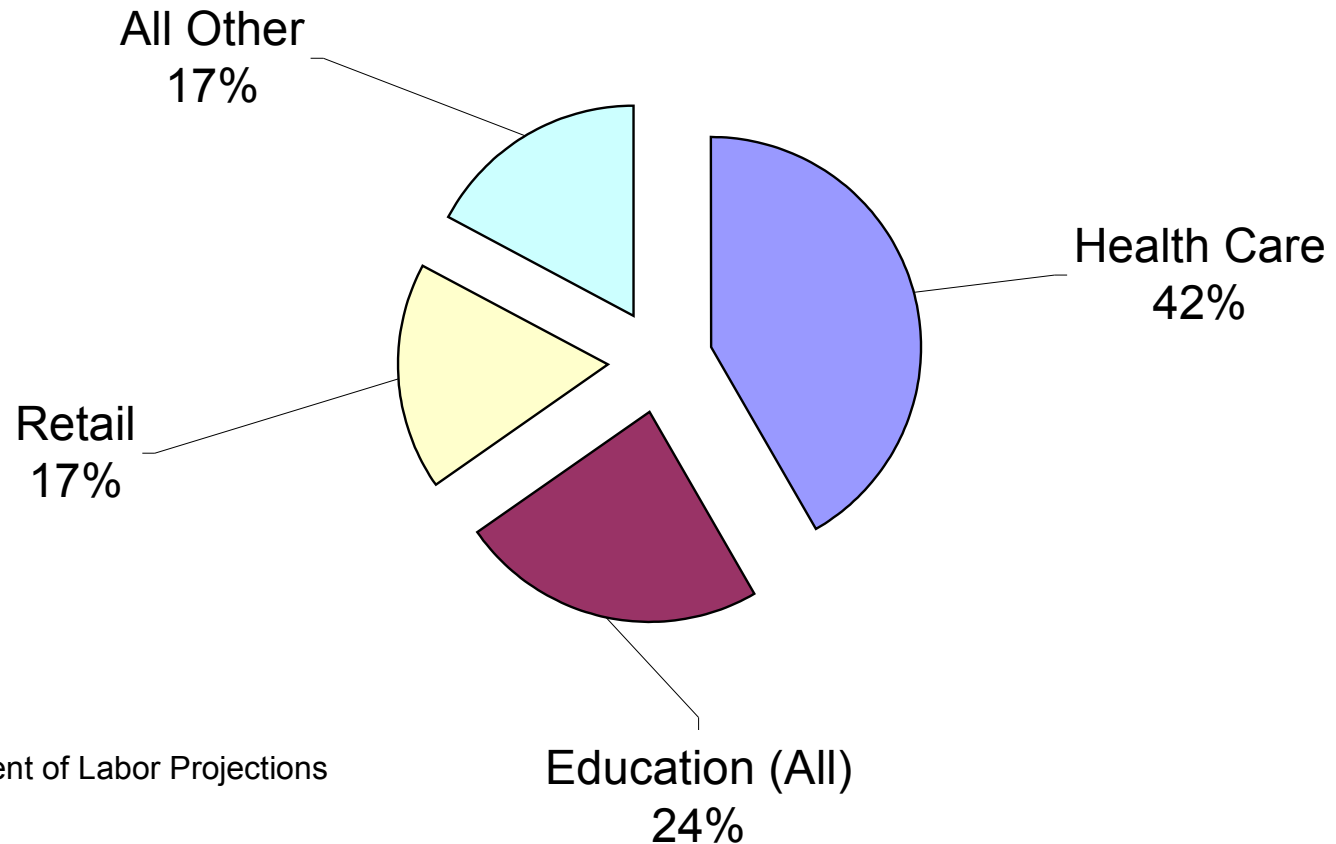
Age Distribution: 2020?

Distribution of NH Population by Age in 2020



Health Care Accounts for Much of Job Growth

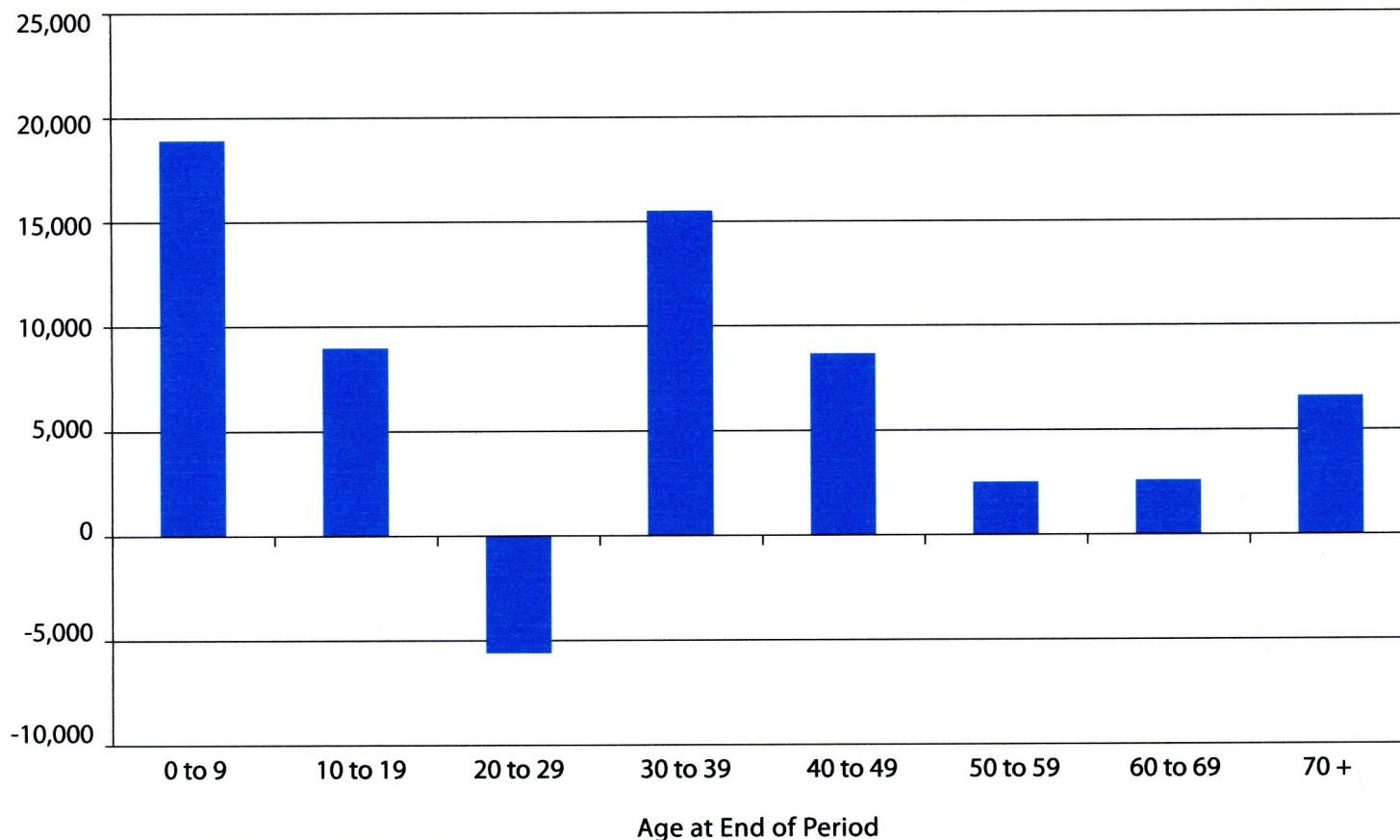
Distribution of Estimated 113,788 New Jobs
by Industry (2004-2014)



Migration Happened (Many from MA!)

Source: www.carseyinstitute.unh.edu

FIGURE 7: NEW HAMPSHIRE AGE SPECIFIC NET MIGRATION, 1990 TO 2000



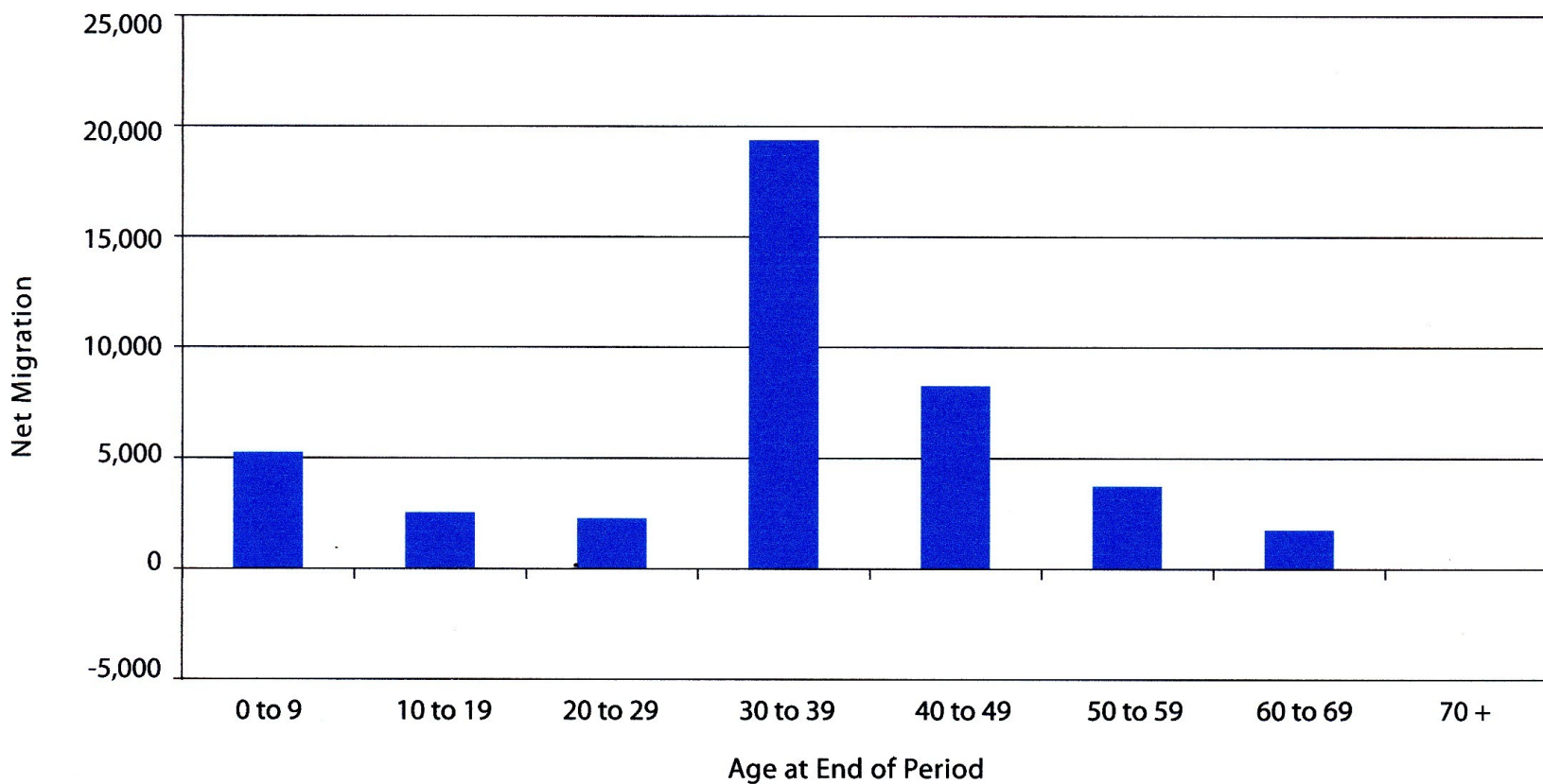
Source: Johnson, et al., 2005 *Demography*
42(4):791-812

Source: Johnson, Ken. 2007. 'The Changing Faces of New Hampshire. The Carsey Institute. Durham, NH.

Migration Happens?

Source: www.carseyinstitute.unh.edu

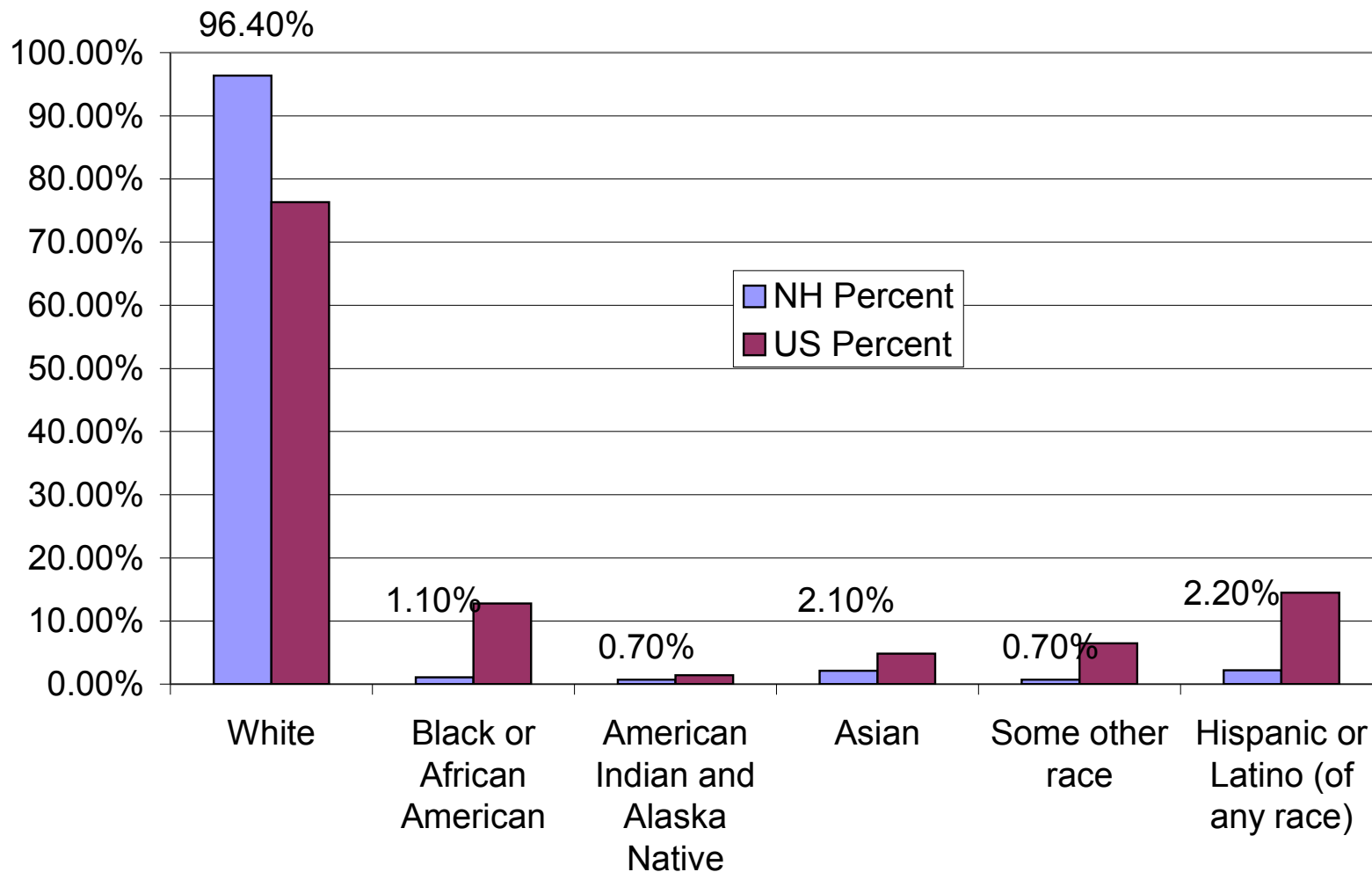
FIGURE 14: ESTIMATED NEW HAMPSHIRE AGE SPECIFIC NET MIGRATION, 2000 TO 2005



Source: Johnson, Ken. 2007. 'The Changing Faces of New Hampshire. The Carsey Institute. Durham, NH.

The Changing Face of NH?

Distribution of Population by Race and Ethnicity (2005)



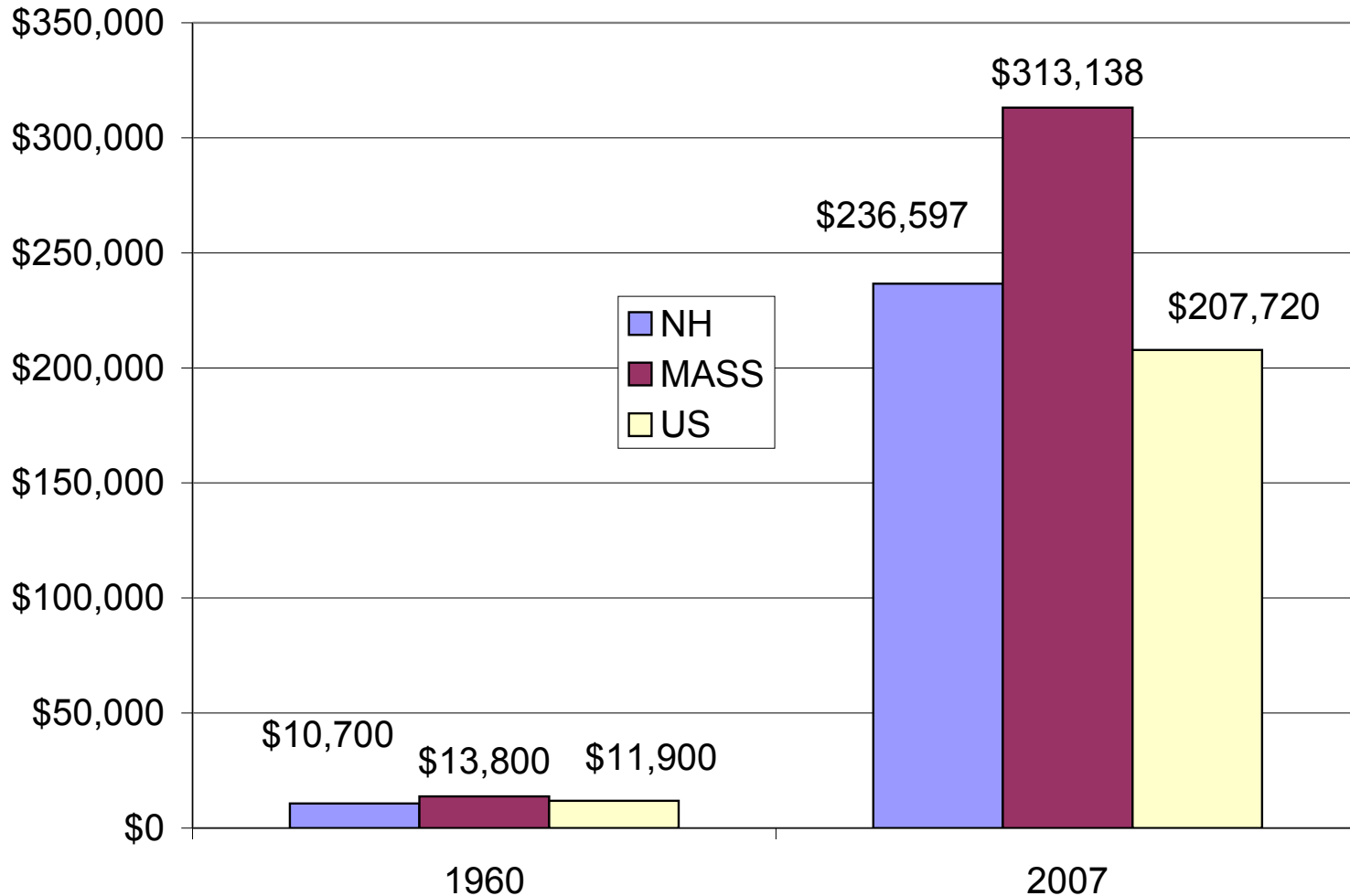


High Growth in foreign born in early 2000s. Higher than US average and similar to Georgia and NC

State	2000-2005 Percentage Change in Foreign Born Population	2000-2005 Average Annual Percentage Change	2005 Foreign Born Population
Georgia	37.8%	6.6%	795,419
New Hampshire	<u>33.8%</u>	6.0%	72,480
North Carolina	30.4%	5.5%	560,753
Massachusetts	15.3%	2.9%	891,184
Connecticut	14.4%	2.7%	423,254
Rhode Island	9.4%	1.8%	130,517
Maine	5.5%	1.1%	38,727
Montana	2.1%	0.4%	16,734
Vermont	-6.0%	-1.2%	21,843
United States	14.8%	<u>2.8%</u>	35,622,125

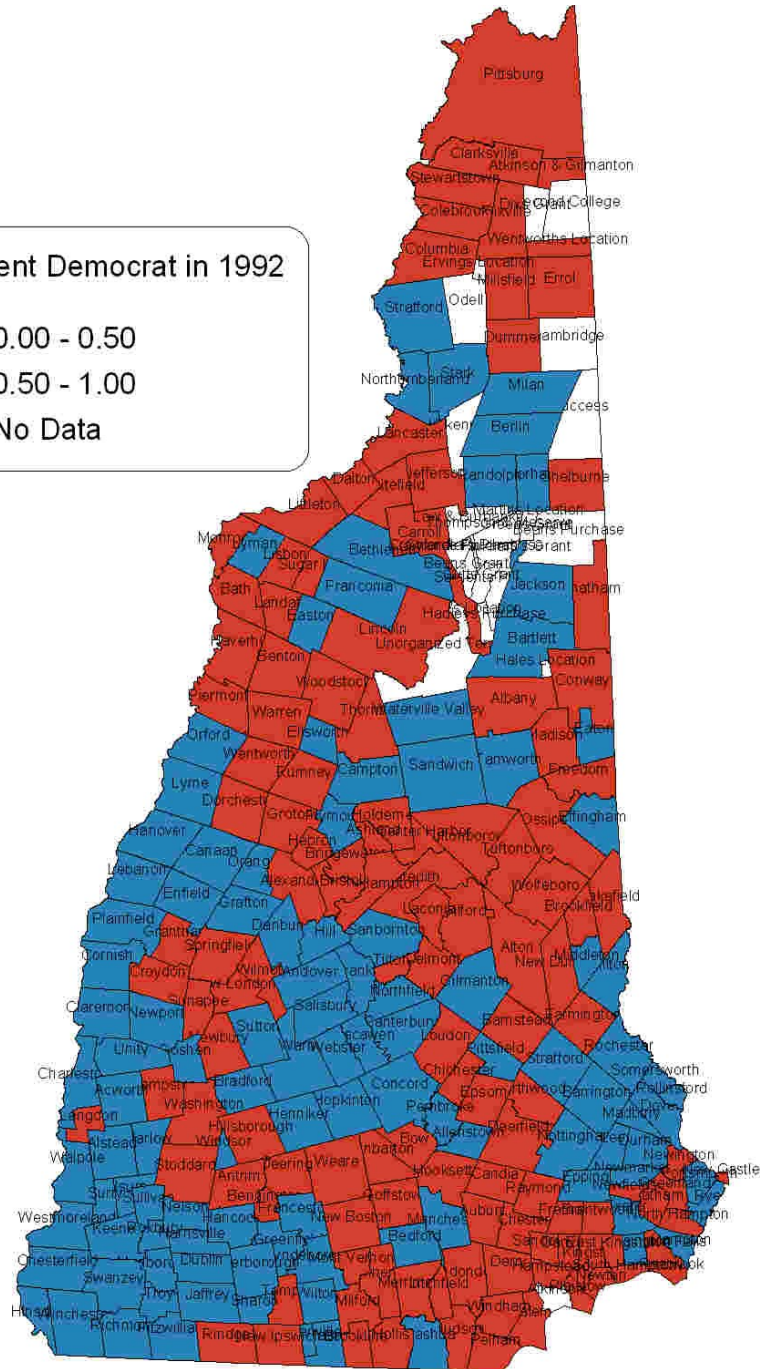
Why NH? Lower Housing Prices?

Median Home Value
(1960 and 2007)



Percent Democrat in 1992

- 0.00 - 0.50
- 0.50 - 1.00
- No Data





Major Policy Levers Which Will Affect Issue of Aging

- Transportation
- Housing Prices
- ‘Retaining Youth’ Initiatives (55 Initiative, the Arts)
- Information Highway
- Conservation, Quality of Life, Water and Sewer
- Business Development
- State and Community Investment
- Taking Advantage of Regional Opportunities



Mt Washington Valley

The North Country

The Lakes Region

What is NH?

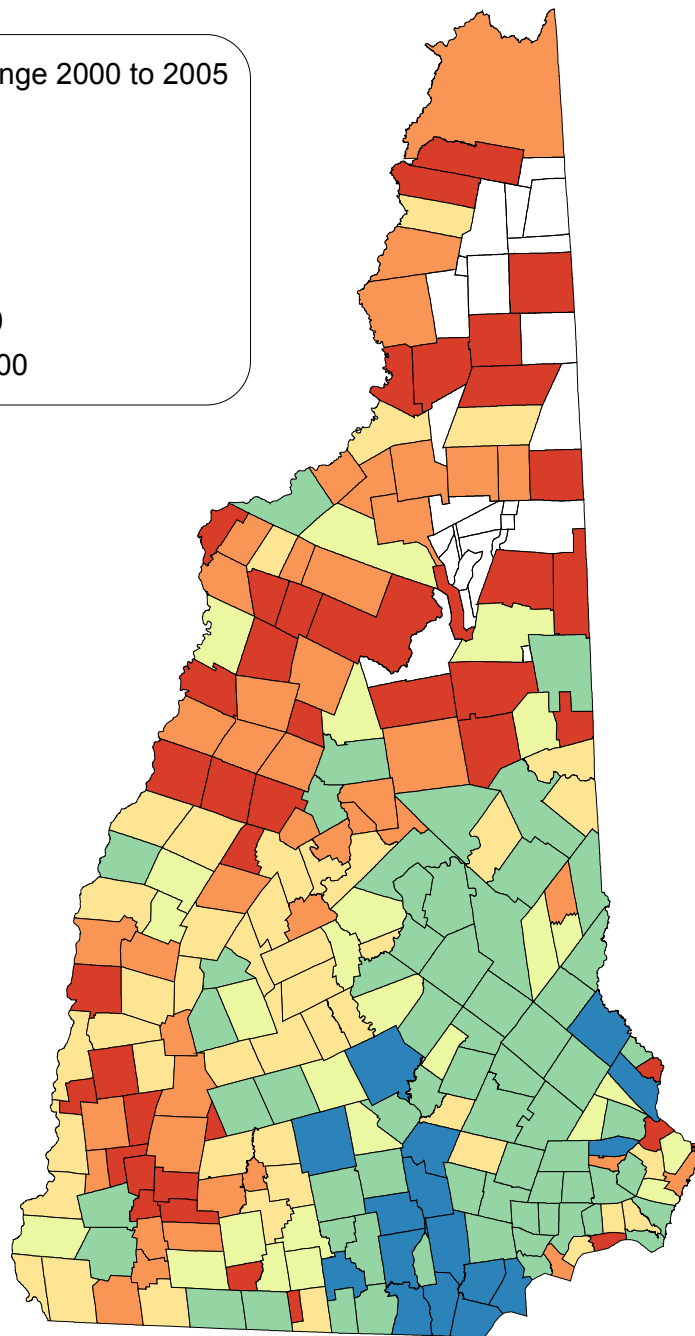
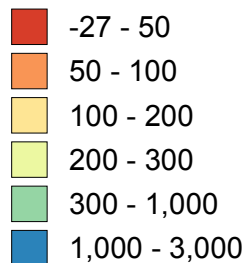
The Seacoast

The Capital Region

The Monadnock Region

The Tech Corridor?

Population Change 2000 to 2005



Geographic Variation: What Do Regions Have in Common?



And the Agent for Change is ...

? Recession ?



NH 2018

- Many policy levers affecting the future.
- Prediction for 2018? Not that much different than now.
- Recession makes investment and change difficult.
- State and local policy decisions regarding transportation, housing and energy likely to fundamentally shape 2018 and BEYOND.
- What will the boomers do?



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