



JOBS FOR THE FUTURE

NEW HAMPSHIRE SECTOR PARTNERSHIP INITIATIVE

TARGET INDUSTRY SECTORS

MARCH 2016

INTRODUCTION

Observations from an analysis of the New Hampshire labor market informed the New Hampshire Sector Partnership Initiative (SPI) team’s selection of industries to target for engagement. After reviewing existing labor market research, Jobs for the Future (JFF) met with the SPI team from December 2015 through January 2016 to discuss key findings and resolve data collection queries in order to come to consensus. Once the team agreed on the industries to target, JFF began compiling more detailed overviews of the labor market dynamics within each industry (the overviews will be available at the four target sectors’ launch meetings hosted with respective industry partners). A full synthesis of the sector analyses will be compiled in summer 2016.

Key data for each industry are listed below. JFF highlighted each industry’s most salient variables and customized tables to help the readability of the report, so there is some variation in the table columns for the different industries. All data collected for the purposes of this report can be found in the accompanying New Hampshire Target Sectors Chartbook.

ANALYSIS CONSIDERATIONS

In order to determine the target sectors that could form the basis of potential partnerships, JFF and the SPI team took the following factors into consideration while examining statewide labor market data:

Analysis focused on sectors with a significant amount of **middle-skill occupations**: jobs requiring more than a high school diploma, but less than a four-year degree.

EMPLOYMENT OPPORTUNITIES

Since “employment” refers to the number of workers in an occupation or industry, the team looked for industries that employ a significant portion of the state’s labor force. To gauge current and future job opportunities within the state’s industries, the team also reviewed projected job-growth data and online job advertisements.

Target Industry Sectors:

- Healthcare
- Manufacturing
- Information Technology
- Hospitality

INDUSTRY CONCENTRATION

“Location quotient” is the per capita concentration of an industry or occupation in a region as compared with the national average. The industries highly concentrated in an area are usually critical to the health of its economy and serve as a guide to understanding what makes that area’s labor market unique.

EDUCATION LEVEL

Employers, educators, and workforce intermediaries collaborate within sector partnerships to align job training investments with the needs of local labor markets. For the partnerships to be fruitful, the team targeted sectors that employ the greatest number of workers in middle-skill occupations, jobs that require some form of postsecondary education or training, but less than a four year degree. “Education level,” as used in the tables below, refers to the typical education level required to qualify for a position. The team used industry staffing pattern percentages to determine the spectrum of occupations within a given industry, then examined the typical entry-level education required for those occupations.

WAGES

To ensure that opportunities to train program graduates were focused on occupations that command competitive self- and family-supporting wages, the team considered the median hourly wages of key occupations in the state’s industries.

OVERVIEW OF NEW HAMPSHIRE SECTORS

KEY OBSERVATIONS

- The four sectors employing the most workers in New Hampshire are Retail Trade (97,184 jobs in 2015), Healthcare and Social Assistance (88,057), Government (83,113), and Manufacturing (67,801).
- For this analysis, we combined two of the NAICs industry groups listed below, the Accommodation and Food Services industry (56,334 jobs in 2015) and the Arts, Entertainment and Recreation industry (11,356) to explore the state’s hospitality economy. Combining these two groups indicates that there are 67,690 jobs in hospitality, excluding extended proprietors (as described below).
- We combined the Professional, Scientific, and Technical Services industry (32,551 jobs in 2015) with the Finance and Insurance industry (28,398) to explore the state’s business and professional services economy, and identify job openings in the information technology sector.
- While the Retail Trade sector is the state’s largest industry by employment, the team determined that convening effective retail sector partnerships was impractical in light of its limited career-advancement opportunities and lack of well-paying jobs.
- The Government sector is the state’s third largest by employment, but it includes all public education jobs, which, at the elementary and secondary levels require advanced postsecondary education.

- Based on an analysis of various factors, the SPI identified four initial target sectors: healthcare, manufacturing, information technology, and hospitality.

Table 1: New Hampshire Two-Digit Industry Data

NAICS	Description	2015 Jobs	2015 Location Quotient ⁱ
44	Retail Trade	97,184	1.36
62	Healthcare and Social Assistance	88,057	1.05
90	Government	83,113	0.87
31	Manufacturing	67,801	1.21
72	Accommodation and Food Services	56,334	0.96
56	Administrative and Support and Waste Management and Remediation Services	33,298	0.82
54	Professional, Scientific, and Technical Services	32,551	0.83
52	Finance and Insurance	28,398	1.09
42	Wholesale Trade	27,168	1.01
23	Construction	24,139	0.83
81	Other Services (except Public Administration)	20,277	1.04
61	Educational Services	18,454	1.50
48	Transportation and Warehousing	14,015	0.68
51	Information	12,521	0.99
71	Arts, Entertainment, and Recreation	11,356	1.16

Source: EMSI

ⁱ A location quotient above 1.0 indicates that the industry is more highly concentrated than the national average

HEALTHCARE

KEY OBSERVATIONS

- The Healthcare and Social Assistance industry employed 88,057 workers in 2015, the second highest number of jobs in the state.
- Of those jobs, 53,210 (60.4%) required more than a high school diploma, suggesting ample job opportunities for individuals completing training programs.
- Within Healthcare, Ambulatory Healthcare Services employed 30,728 workers at 2,371 business establishments, and Hospitals employed 28,403 workers at just 42 business establishments. The numerical difference between these subsectors underscores the importance for sector partners of differentiating between the employment needs of large hospitals and those of small medical practices.

Healthcare Skills In Greatest Demand:

- Patient Care
- Treatment Planning
- Rehabilitation
- Patient/Family Instruction
- Coordination

Top Requested Certifications

- Registered Nurse
- First Aid CPR AED
- Certified Nursing Assistant
- Basic Cardiac Life Support
- Nurse Practitioner

Table 2: Top Healthcare Subsectors

NAICS	Description	2015 Jobs	2014 Establishments
621	Ambulatory Healthcare Services	30,728	2,371
622	Hospitals	28,403	42
623	Nursing and Residential Care Facilities	15,235	338

Source: EMSI

- All the top healthcare occupations are projected to grow between 10-25% in the next five years.
- Registered Nurses, Nursing Assistants, and Medical Assistants made up the lion's share of healthcare jobs in 2015.
- New Hampshire sector employers posted the most online job advertisements for Registered Nurses as well, but Physical Therapists and Speech-Language Pathologists were the second and fourth most commonly advertised positions. Even though Physical Therapists and Speech-Language Pathologists are not part of the five largest healthcare

occupations, job-posting activity may suggest that employers are struggling to fill these positions.

- Genesis Healthcare Corporation, Dartmouth-Hitchcock Medical Center, and the Hospital Corporation of America advertised the most jobs in 2015.

Table 3: Top Healthcare Occupations

SOC	Description	2015 Jobs	2015-2020 % Change	Median Hourly Earnings	Regional Completions (2012) ⁱⁱ	Openings
29-1141	Registered Nurses	12,733	10%	\$30.68	864	2,552
31-1014	Nursing Assistants	8,639	10%	\$13.76	132	1,773
31-9092	Medical Assistants	2,186	16%	\$15.68	595	588
29-2061	Licensed Practical and Licensed Vocational Nurses	2,157	16%	\$22.58	176	637
31-1011	Home Health Aides	1,858	25%	\$11.93	39	668

Source: EMSI

Table 4: Healthcare Job Ad Dataⁱⁱⁱ

Employer	Job Postings	Occupation	Job Postings
Genesis Healthcare Corporation	1,090	Registered Nurses	2,690
		Physical Therapists	1,188
Dartmouth-Hitchcock Medical Center	1,026	Nursing Assistants	601
		Speech-Language Pathologists	552
Hospital Corporation of America	442	Medical and Health Services Managers	456
		Licensed Practical and Licensed Vocational Nurses	422
Kindred Healthcare Incorporated	400	Physical Therapist Assistants	255
Elliot Health System	380	Medical Records and Health Information Technicians	237
St. Joseph Hospital	338		

ⁱⁱ Regional Completions are the number of individuals in the state who completed a training program aligned with the listed occupation.

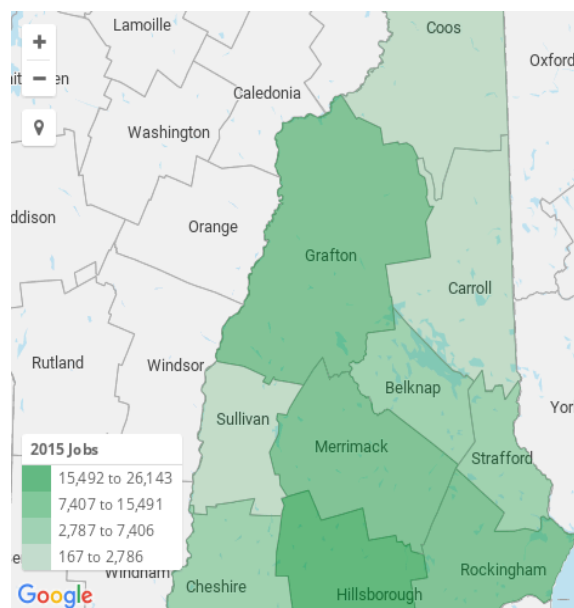
ⁱⁱⁱ All job ad data in this report is for the full year of 2015 in the state of New Hampshire

Source: *Burning Glass*

- The Healthcare industry has the highest per-capita concentration (measured by location quotient) in Grafton County, which employs over 11,500 workers.
- Considering the major hospital center in Grafton county and the existence of several smaller employers in the northern counties, the team deemed it appropriate to solicit feedback from multiple groups of healthcare employers across the state.

Table 5: Healthcare by Location

NH County	2015 Jobs	2015-2020 % Change	2015 Location Quotient
Hillsborough County	26,143	13%	1.16
Rockingham County	14,422	12%	0.83
Grafton County	11,539	13%	1.85
Merrimack County	9,862	13%	1.14
Strafford County	6,314	10%	1.14
Cheshire County	3,748	10%	0.93
Belknap County	3,507	11%	1.04
Carroll County	2,535	7%	0.91
Coos County	1,837	2%	1.22
Sullivan County	1,400	3%	0.77



Source: *EMSI*

MANUFACTURING

KEY OBSERVATIONS

- The Manufacturing industry employed 67,801 workers in 2015, the fourth most in the state.
- Of those jobs, 19,466 (28.7%) require more than a high school diploma.
- There were 2,031 Manufacturing establishments in 2014, suggesting a wide and diverse range of employers. The top five manufacturing subsectors are also more highly concentrated in New Hampshire than the national average, with Computer and Electronic Product Manufacturing, Fabricated Metal Product Manufacturing, and Machinery Manufacturing employing the most workers.
- The fifth largest occupation within Manufacturing is “Production Workers, All Other.” When an industry is highly concentrated in an area, it is not unusual to see a large number of jobs grouped in the “All Other” category partly because the nature of these jobs is more specialized, thus making a more specific occupation code harder to assign. “Production Workers, All Other” is also the most commonly requested occupation code in online advertisements, underscoring the need for sector partners to look more closely at the industry’s nuanced job classifications.
- According to the US Census Bureau’s Quarterly Workforce Indicators, there were an average of 2,047 Manufacturing hires due to replacement each quarter from 2014-2015, significantly less than the average of 2,946 Manufacturing separations over the same time period. This data seems to verify feedback from manufacturing employers that they are struggling to fill replacement positions when workers decide to retire or move on to a different company.
- Novo Nordisk, Hypertherm Incorporated, and Dell advertised the most jobs online in 2015.

Manufacturing Skills In Greatest Demand:

- Inspection
- Repair
- Computer Aided Drafting/Design
- Sales
- Machining

Top Requested Certifications

- Certified Accounts Payable Associate
- Six Sigma Certification
- Certified Public Accountant
- Certified Quality Engineer
- American Society of Mechanical Engineers Certification

Table 6: Top Manufacturing Subsectors^{iv}

NAICS	Description	2015 Jobs	2015 Location Quotient	2014 Establishments
334	Computer and Electronic Product Manufacturing	14,652	3.05	267
332	Fabricated Metal Product Manufacturing	12,185	1.83	411
333	Machinery Manufacturing	7,361	1.44	163
326	Plastics and Rubber Products Manufacturing	5,043	1.61	94
335	Electrical Equipment, Appliance, and Component Manufacturing	4,051	2.36	57

Source: EMSI

Table 7: Top Manufacturing Occupations

SOC	Description	2015 Jobs	Median Hourly Earnings	2015 Location Quotient	Regional Completions (2012)	Openings	Typical Entry Level Education
51-2092	Team Assemblers	4,431	\$15.29	0.82	0	397	High school diploma or equivalent
51-9061	Inspectors, Testers, Sorters, Samplers, and Weighers	3,584	\$19.75	1.42	0	442	High school diploma or equivalent
51-1011	First-Line Supervisors of Production and Operating Workers	3,047	\$26.74	1.06	118	260	Post-secondary non-degree award
51-4041	Machinists	2,634	\$19.83	1.38	124	376	High school diploma or equivalent
51-9199	Production Workers, All Other	2,348	\$14.92	1.94	0	338	High school diploma or equivalent

^{iv}While we considered all available data categories in evaluating potential target sectors, table columns in this document are different in each industry section to highlight each industry's most salient variables and for readability. For example, we include location quotient in the manufacturing tables to show how highly concentrated these subsectors and occupations are within the state, but did not include location quotient data in the healthcare tables. Healthcare's concentration in the state is closer to the national average, but its high overall employment and projected growth define its promise for sector partnership potential.

SOC	Description	2015 Jobs	Median Hourly Earnings	2015 Location Quotient	Regional Completions (2012)	Openings	Typical Entry Level Education
51-2022	Electrical and Electronic Equipment Assemblers	2,058	\$14.49	2.18	0	116	High school diploma or equivalent
51-4011	Computer-Controlled Machine Tool Operators, Metal and Plastic	1,908	\$17.58	2.78	120	349	High school diploma or equivalent

Source: EMSI

Table 8: Manufacturing Job Ad Data

Employer	Job Postings
Novo Nordisk	189
Hypertherm Incorporated	138
Dell	120
Albany International Corporation	94
Osram Sylvania	94

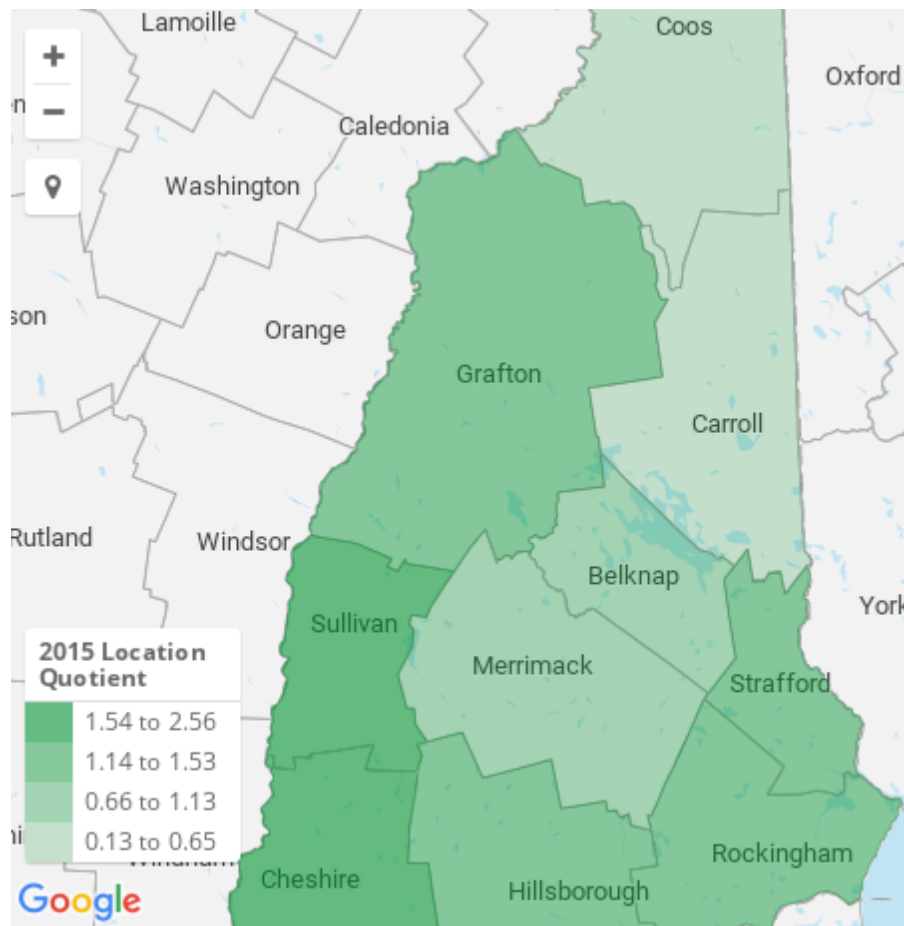
Occupation	Job Postings
Production Workers, All Other	446
Inspectors, Testers, Sorters, Samplers, and Weighers	207
Laborers and Freight, Stock, and Material Movers	201
Sales Representatives, Wholesale and Manufacturing, except Technical and Scientific Products	192
Engineers, All Other	169
Team Assemblers	157
Industrial Engineers	153
First-Line Supervisors of Production and Operating Workers	146

Source: Burning Glass

- Seven out of ten counties feature a higher than average Manufacturing sector concentration, showing how prolific the industry is throughout the state. As a result, the SPI team thought it prudent to meet with employers across the state.

Table 9: Manufacturing by Location Quotient

NH County	2015 Jobs	2015 Location Quotient
Sullivan County	3,620	2.56
Cheshire County	4,888	1.55
Hillsborough County	26,124	1.49
Strafford County	5,586	1.29
Grafton County	5,775	1.18
Rockingham County	15,775	1.17
Belknap County	2,691	1.02
Merrimack County	6,598	0.98
Coos County	750	0.64
Carroll County	1,204	0.56



Source: EMSI

INFORMATION TECHNOLOGY

- There were 60,949 jobs in the Professional, Scientific, and Technical Services and Finance and Insurance industries in 2015 (NAICS codes 52+54). A portion of these jobs are in the Information Technology (IT) field, as described below.
- Of those jobs, 32,774 (53.8%) required more than a high school diploma.
- Unlike Healthcare and Manufacturing, which both employ large numbers of workers with sub-Bachelors (BA/BS) degrees and short-term training credentials, 27,325 (44.8%) of the jobs in these combined industries require a Bachelor's degree or higher.
- This leaves approximately 5,500 jobs in the sub-BA, shorter term training range.
- The majority of the 5,500 sub-BA/BS, shorter term training jobs are in the IT field (Computer User Support Specialists, Web Developers, and Computer Network Support Specialists).
- The SPI team determined that while the professional services industries are critical to the state's economy, a partnership focused specifically on professional services would be hard to sustain in light of the jobs requiring advanced credentials.
- While information technology is technically a group of occupations rather than a sector, there are over 15,000 computer and mathematical workers in Hillsborough, Rockingham, and Strafford Counties. The SPI team determined that training IT workers through the initiative could serve the state's professional services industries as well as provide workers with a skillset that is in high demand across the state's other industries.

IT Skills In Greatest Demand:

- SQL
- Java
- Oracle
- Linux
- Technical Support

Top Requested Certifications

- Project Management Certification (e.g. PMP)
- Cisco Certified Network Professional
- Certified Information Systems Security Professional
- Microsoft Certified Systems Engineer
- Certified A+ Technician

Table 10: Top Sub-BA Professional, Scientific, and Technical Services and Business and Financial Occupations

SOC	Description	Employed in Industry Group (2015)	Median Hourly Earnings	Typical Entry Level Education
15-1151	Computer User Support Specialists	847	\$23.77	Some college, no degree
49-2011	Computer, Automated Teller, and Office Machine Repairers	66	\$20.23	Some college, no degree
23-2011	Paralegals and Legal Assistants	957	\$21.77	Associate's degree

SOC	Description	Employed in Industry Group (2015)	Median Hourly Earnings	Typical Entry Level Education
17-3011	Architectural and Civil Drafters	380	\$24.64	Associate's degree
15-1134	Web Developers	336	\$26.39	Associate's degree
15-1152	Computer Network Support Specialists	186	\$27.26	Associate's degree

Source: EMSI

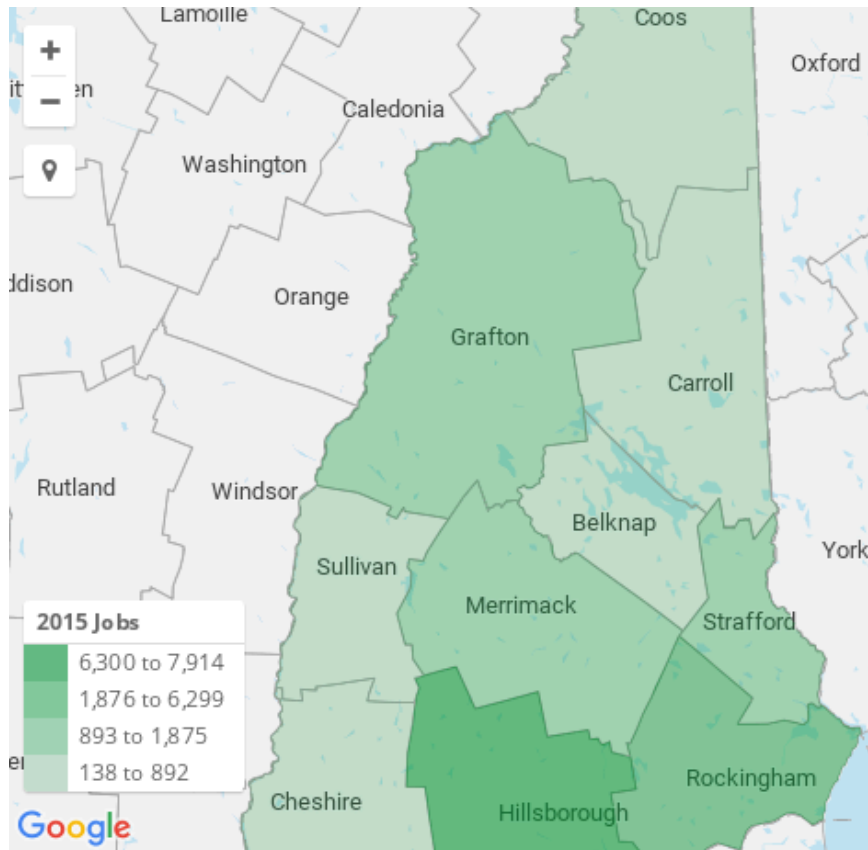
Table 11: Information Technology Job Ad Data

Employer	Job Postings	Occupation	Job Postings
Liberty Mutual	608	Software Developer/ Engineer	3,406
Fidelity Brokerage Services	265	Computer Support Specialist	647
		Database Administrator	628
Oracle	199	Software QA Engineer/ Tester	603
BAE Systems	137	Network/ Systems Administrator	546
Anthem Blue Cross	107		

Source: Burning Glass

Table 12: Computer and Mathematical Occupations by Location

NH County	2015 Jobs	2015-2020 % Change	2015 Location Quotient	Openings
Hillsborough County	7,914	9%	1.29	1,426
Rockingham County	4,686	9%	1.00	875
Strafford County	1,408	10%	0.93	267
Grafton County	1,310	4%	0.77	195
Merrimack County	1,778	6%	0.76	265
Cheshire County	692	3%	0.63	86
Belknap County	503	4%	0.55	66
Sullivan County	204	7%	0.41	38
Carroll County	292	5%	0.39	43
Coos County	138	2%	0.34	16



Source: EMSI

HOSPITALITY

- There were 67,690 jobs in the Accommodation and Food Services and Arts, Entertainment, and Recreation industries in 2015. New Hampshire Employment Security Economic and Labor Market Information Bureau research indicates that employment in the Hospitality cluster is highly seasonal. Taking extended proprietors into account (people who work in Hospitality on a seasonal basis or as a second form of income), there were 82,676 jobs in the Accommodation and Food Services and Arts, Entertainment, and Recreation industries in 2015.
- These combined industries were more highly concentrated in New Hampshire’s four northernmost counties than in any of the six southern counties.

Hospitality Skills In Greatest Demand:

- Mathematics
- Restaurant and Store Management
- Product Sale and Delivery
- Scheduling
- Decision Making

Top Requested Certifications

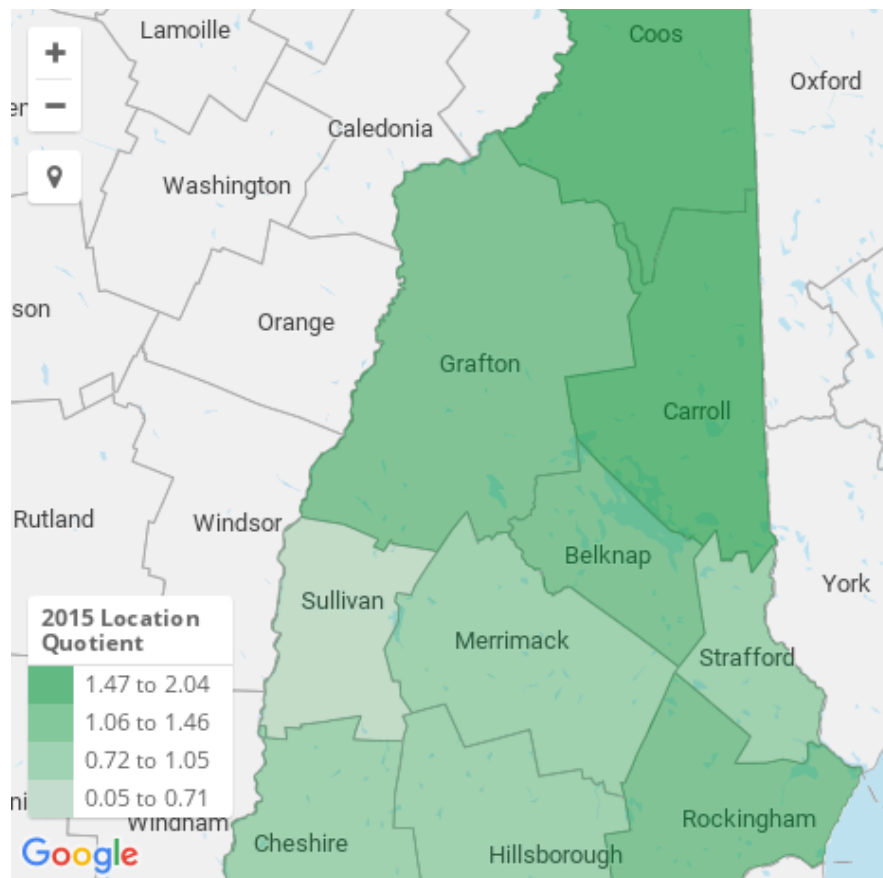
- ServSafe
- First Aid CPR AED
- Training for Intervention Procedures (TIPS)

- Hospitality is one of the state’s critical economic drivers, with a gross domestic product of \$2.52 billion in 2014 and employing a large number of workers^v.
- While occupational coding suggests that 75,491 (91.3%) of Hospitality jobs (including extended proprietors) require no more than a high school diploma, occupational coding may not reflect unique job responsibilities in highly localized industries. The SPI team relied on more recent, contextualized research from the New Hampshire Employment Security’s Economic and Labor Market Information Bureau to establish the need for Hospitality related job training. For more information, please visit: <http://www.nhes.nh.gov/elmi/products/sector-analysis.htm>.
- Within the Accommodation and Food Services cluster, NHES identified career pathways in culinary/kitchen occupations, food and beverage service, lodging/hotels, event planning/catering, building management, and business administration.
- Within the Arts, Entertainment and Recreation cluster, NHES identified employment demand for occupation groups covering Performing Arts, Parks, Zoos, and Historical sites, and Gambling, Recreation, and Amusements.
- NHES identified over 35 Hospitality related short-term postsecondary training programs at in-state institutions and over 20 Hospitality related Career and Technical Education programs at in-state high schools.
- NHES determined that in 2014, the four counties with the largest share of private employment in Accommodation and Food Services also had the highest average weekly wage.
- Given the NHES research, the high industry concentration, large employment totals, and high economic output, the SPI team determined that Hospitality is a critical sector to include in the initiative.

Table 13: Hospitality: Accommodation and Food Services and Arts, Entertainment and Recreation by Location

NH County	2015 Jobs	2015-2020 % Change	2015 Location Quotient
Grafton County	7,810	4%	1.16
Carroll County	6,112	3%	2.04
Belknap County	4,909	6%	1.34
Coos County	2,761	1%	1.70

^v <http://www.nhes.nh.gov/elmi/products/sector-analysis.htm>



Source: EMSI

Table 14: Top Hospitality Subsectors

NAICS	Description	2015 Jobs	2015 - 2025 % Change	2015 Location Quotient	2014 Establishments
722	Food Services and Drinking Places	46,453	8%	0.93	3,046
721	Accommodation	9,882	9%	1.15	552
713	Amusement, Gambling, and Recreation Industries	9,301	10%	1.33	537
711	Performing Arts, Spectator Sports, and Related Industries	1,474	8%	0.69	171
712	Museums, Historical Sites, and Similar Institutions	581	9%	0.87	66

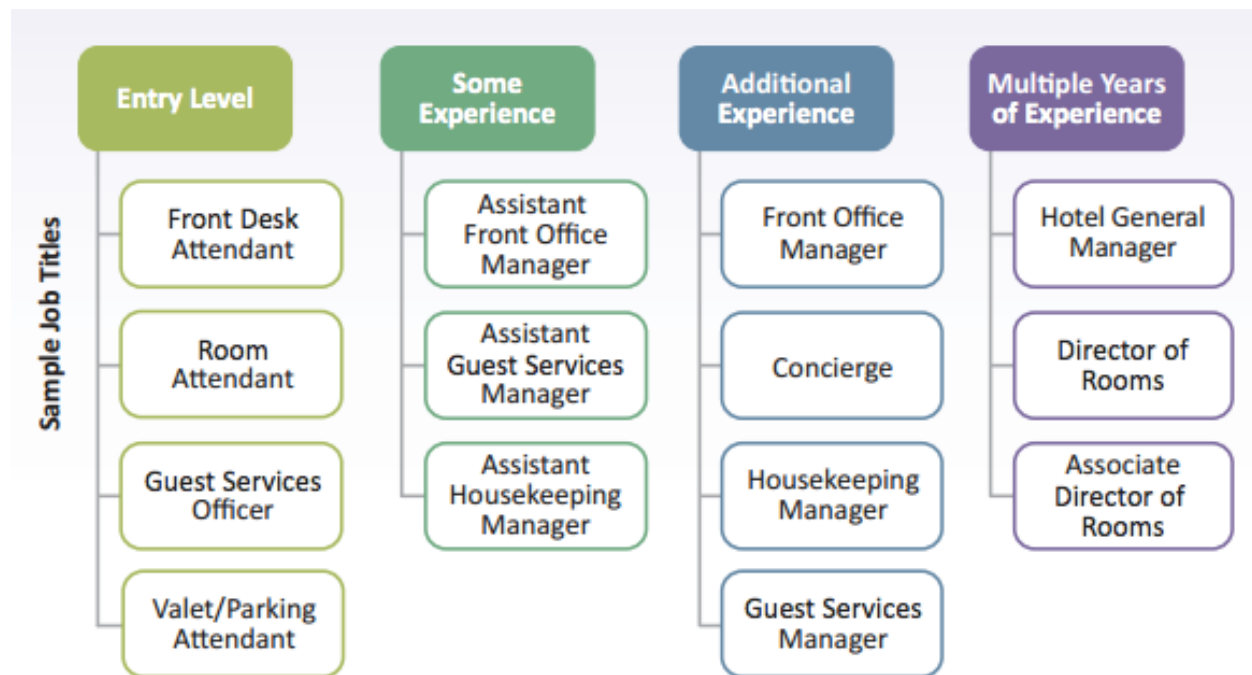
Table 15: Hospitality: Top Occupations Requiring Postsecondary Experience

SOC	Description	Employed in Industry Group (2015)	Median Hourly Earnings
35-1012	First-Line Supervisors of Food Preparation and Serving Workers	2,815	\$16.08
11-9051	Food Service Managers	2,090	\$17.96
39-9031	Fitness Trainers and Aerobics Instructors	2,074	\$15.09
11-9081	Lodging Managers	841	\$15.01
35-1011	Chefs and Head Cooks	803	\$17.91
39-9032	Recreation Workers	660	\$11.13
11-1021	General and Operations Managers	656	\$47.11

Table 16: Hospitality Job Ad Data

Employer	Job Postings	Occupation	Job Postings
Omni Hotel Corporation	604	Combined Food Preparation and Serving Workers, Including Fast Food (35-3021.00)	383
Compass Group	152	Cooks, Restaurant (35-2014.00)	347
Panera Bread	135	First-Line Supervisors of Food Preparation and Serving Workers (35-1012.00)	335
Applebee's Neighborhood Grill & Bar	103	Food Service Managers (11-9051.00)	275
Sodexo	99	Waiters and Waitresses (35-3031.00)	193

Figure 1: Sample Lodging/Hotels Career Path



Source: <http://www.nhes.nh.gov/elmi/products/sector-analysis.htm>

CONCLUDING OBSERVATIONS

The SPI Team is well positioned to take the critical next steps needed to launch strong sector partnerships in healthcare, manufacturing, information technology, and hospitality. The following are some key observations on upcoming phases of the SPI Team’s work to develop these partnerships:

- Partnership Considerations.** As it prepares to launch sector partnerships, the SPI Team will identify strong industry champions for each sector partnership, along with capable intermediaries to support and sustain this work. It is critical for the industry champions to be individuals who are supported by their peers, with the time, interest, and ability to convene them. Intermediaries should be organizations that are trusted by industry and other stakeholders, with the capacity to support effective, industry-led convenings. The SPI team has done excellent work identifying candidates for both these roles, and JFF will work closely with the team to help it finalize the organizations that will serve as industry champions and as sector intermediaries.
- Asset mapping with diverse stakeholder groups.** In any state, a wide variety of organizations have deep perspective on the needs of key industries, resources that are available, and the challenges facing the workforce. One critical next step in this project

is to complete a comprehensive asset mapping process, which will provide critical insight into all these areas including vetting the labor market analysis presented in the report and providing the occupational nuances and complexities that are not always reflected in the data. The SPI has compiled a very strong list of key organizations throughout the state to engage in this process, and JFF will ensure that it shares the key findings from the asset mapping with the SPI Team to help fully inform the development of sector partnerships.

- **Baseline/Employability Skills.** Employability skills, such as work ethic and punctuality, are critical for occupations across the four targeted sectors, and are often lacking in candidates for entry-level positions. As JFF completes its targeted labor market information analysis and asset mapping, it will determine if employers in these four industries struggle to find job applicants that possess these skills, and report any findings to the SPI team. Once sector partnerships launch, employers in the targeted industries may ultimately seek assistance from education and training and other stakeholders in addressing these types of skill needs among job seekers, along with helping them acquire specific technical skills.

DATA SOURCES AND LIMITATIONS

During the initial planning and research phase, the team reviewed labor market data from the New Hampshire Employment Security's Economic + Labor Market Information Bureau, the New Hampshire Economic Development FY 2016-17 Strategic Plan, the New Hampshire Job Training Fund's 2014-2015 Activities Report.

This report uses data from the Economic Modeling Specialists International Analyst (EMSI) platform. EMSI aggregates data from more than 90 federal, state, and private sources, including the Quarterly Census of Employment and Wages (QCEW) from the Bureau of Labor Statistics, local area personal income (LAPI) from the Bureau of Economic Analysis, county business patterns (CBP) from the Census Bureau, and establishments data from Infogroup. EMSI has proprietary methods to remove suppressions and to include data for proprietors to yield a comprehensive representation of the regional workforce. Unlike the Bureau of Labor Statistics data, EMSI's trademarked methodology includes underreported self-employment, investment trusts and partnerships, certain farms, and tax-exempt nonprofit cooperatives.

This report also includes analytical information from Burning Glass Technologies, which provides real-time labor market demand information from online job postings. All job ad data in this report is for the full year of 2015 in the state of New Hampshire. Real-time labor market information (RT LMI) is data gleaned from a large volume of online job postings. Several private-sector entities have developed software that collects online job postings by "scraping" or "spidering" the listings from the internet and organizing them into standardized data categories, especially the North American Industry Classification System (NAICS) and the Standard

Occupational Classification (SOC) system. Burning Glass’s patented parsing and data extraction capabilities can extract, derive, and infer from more than 70 data elements in an online job posting. This opens profound insights into employers’ demands for skills and credentials.

RT LMI complements the traditional LMI with more recent information on employer skills, education, and credential demand. By scouring recent online postings, Burning Glass can offer insight into newly emerging skills in unique combinations. The obvious limitation of job postings data is that the data are only retrievable from the web. Jobs that go unposted (which may include a large share of the middle-skill occupations) remain invisible. Similarly, EMSI draws on a composite dataset that integrates over 90 federal and state labor market data sources. Some of these sources contain data points that are undisclosed or “suppressed” by regulations put in place to protect the privacy of businesses that report to them. In some cases, EMSI uses proprietary algorithms to replace these suppressions with mathematically educated estimates.

Some of the limitations of labor market data sources can be overcome through qualitative interviews with employers, educators, policymakers, and workforce intermediaries whose on-the-ground experience can fill in gaps about future employer skill demand and participant supply. Overall, data can be a useful starting point, but the intricacies of talent shortages and job openings still require verification at the local level.



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