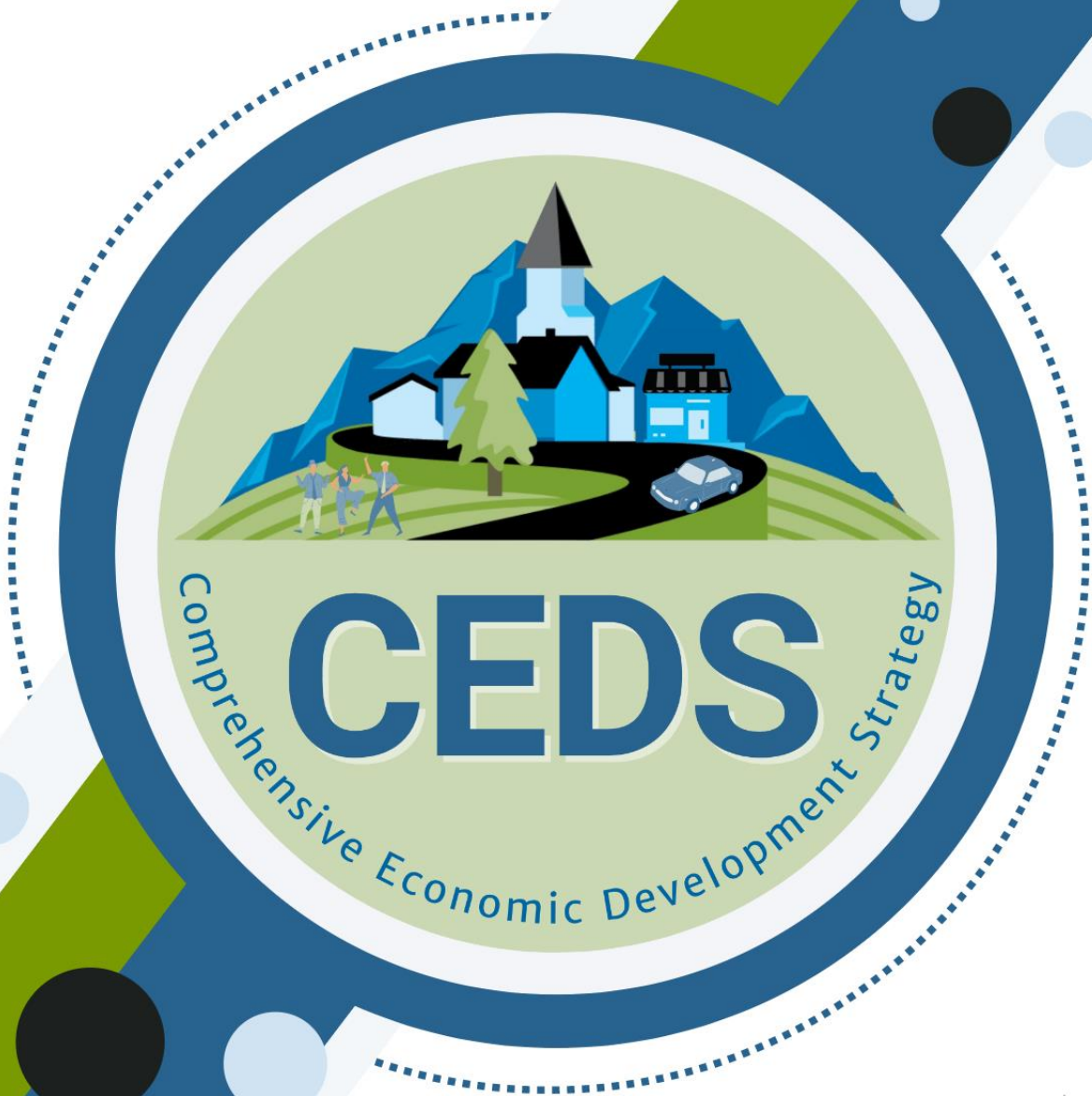


# COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY

2023-2028

Amended October 2024



**Funding for this work is provided by:**

The U.S. Department of Commerce, Economic Development Administration Grant ED22PHI3020022 and with help from the North Country Comprehensive Economic Development Strategy Committee.

---

Endorsed by North Country Comprehensive Economic Development Strategy (CEDS)  
Committee on February 17, 2023

Recommended by North Country Council Board of Directors on March 16, 2023

Adopted by the North Country Council Commission on June 21, 2023

Amended in June 2024 and endorsed by the North Country CEDS Committee on August 22, 2024; recommended by North Country Council Board of Directors on September 19, 2024; and Adopted by the North Country Council Commission on October 23, 2024.

# TABLE OF CONTENTS

EXECUTIVE SUMMARY .....	1
RECOGNITION FOR OUR TEAM.....	1
CEDS GOALS & CROSS CUTTING THEMES .....	2
VISION.....	2
MISSION.....	3
SUMMARY BACKGROUND .....	3
FOUNDATION FOR THE COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDS) .....	6
NORTH COUNTRY RISING (NCR).....	7
PLANNING PRINCIPLES.....	7
PLANNING PROCESS AND COMMUNITY ENGAGEMENT .....	9
REGIONAL SNAPSHOT AND DATA.....	11
REGIONAL OVERVIEW .....	11
POPULATION.....	13
Current Population Characteristics.....	13
Projections for the Future.....	15
Age of Labor Force .....	16
Poverty .....	16
Disability .....	17
EMPLOYMENT AND WORKFORCE CHARACTERISTICS.....	18
Unemployment.....	18
Unemployment Among Single-Parent Families and Childcare .....	19
Educational Attainment of Workforce and Apprenticeships .....	20
Industry.....	22
Cluster Mapping.....	22
Understanding Market Leakages .....	26
Key Findings.....	27
Wages .....	28
Income.....	29
Trends in Income .....	29
REGIONAL HEALTH INDICATORS.....	30
Mental Health and Substance Abuse .....	31
FOOD INSECURITY .....	32
INFRASTRUCTURE .....	33
Transportation.....	33
Transportation Type.....	34

Characteristics of the Housing Market.....	35
Broadband Access.....	36
Economic Development Programs.....	38
Outdoor Recreation Infrastructure.....	38
INDUSTRIAL AND COMMERCIAL USES.....	39
Industry Changes.....	39
Space Needs .....	43
Reinvesting in our Industries.....	43
NATURAL RESOURCES.....	45
Key Natural Resources .....	45
Outdoor Recreation.....	45
Natural Capital During the Covid-19 Pandemic.....	46
Food and Agriculture.....	47
Land Use .....	47
SWOT ANALYSIS .....	49
WHAT IS A SWOT?.....	49
COMMUNITY SURVEY RESULTS .....	50
Money.....	50
Markets.....	51
People .....	51
Place.....	52
Land Use .....	52
STRATEGIC ACTION PLAN.....	54
APPENDIX .....	62
SWOT ANALYSIS SURVEY RESPONSE TABLES .....	62
Money.....	62
Markets.....	63
People .....	64
Place.....	65
Land Use .....	66

# EXECUTIVE SUMMARY

## RECOGNITION FOR OUR TEAM

North Country Council is sincerely grateful for the support and passion of individuals and organizations involved in the development and maintenance of the Comprehensive Economic Development Strategy (CEDS) in order to improve and preserve regional economic resiliency. The North Country CEDS is a living network of partnerships inclusive of entities reflective of industry across the region. This network is a working collaboration that evolves to meet the needs of the region’s future.

The CEDS Committee is a passionate, dedicated group of individuals tasked with creating the vision and the guiding strategy for the region’s resiliency. These individuals are the ears and eyes on the ground within the region; experiencing, hearing, and living the region’s economy. With this they bring back to others the perspective and connections in forming the strategy. Together, the CEDS Committee forms partnerships of local officials, private businesses, educational institutions, charitable and non-profit representation that join together to create a strategy for the future.

This Strategy is presented in reverse order. First, we focus on “What we will do” by discussing the vision, Strategic Direction & Action Plan. Then, we’ll look at “Why we will do it” by reflecting the area’s background data and analyzing our current position in the SWOT analysis.

CEDS COMMITTEE & OUTSIDE PARTICIPANTS	
Name	Affiliation
Allan Reetz	Hanover Food Cooperative
Amy Bassett	Small Business Administration
Anne Duncan Cooley	Grafton Regional Development Corporation
Annette Cole	White Mountains Community College
Ben Amsden	NH Charitable Foundation
Benoit LaMontagne	NH Business and Economic Affairs
Chris Thayer	Appalachian Mountain Club
Chuck Henderson	Office of US Senator Jeanne Shaheen
Ericka Canales	Coos Economic Development Corporation
George Hunton	NH Community Development Finance Authority
Harrison Kanzler	AHEAD
Jac Cuddy	Mt. Washington Valley Economic Development Council
Jason Achmoody	The Woodsville Guaranty Savings Bank
Jeremy Knowlton	White Mountain Science Inc.
Jon Muise	USDA Rural Development
Julie Renaud Evans	Northern Forest Center
Miguel Morales	Small Business Administration
Misty Sinsigalli	USDA Rural Development
Pam LaFlamme	City of Berlin
Pam Sullivan	WREN
Peter Corey	Northern Community Investment Capital
Sonya Salanti	Neil and Louise Tillotson Fund   NHCF
Stephanie Weiner	Office of US Representative Ann McLane Kuster
Steve Fortier	NH Business and Economic Affairs
Sue Cagle	UNH Cooperative Extension - Grafton
Tim Josephson	Upper Valley Lake Sunapee Regional Planning Commission

**Additionally, gratitude and recognition go to the North Country Council staff Michelle Moren-Grey - Executive Director, Glenn Copleman—Senior Economic Planner, Kaela Tavares—Planning & Economic Development Coordinator, Stacey Doll—Community Resilience Planner, Cathlin Lord—Planning Specialist, Courtney Bowler—Associate Planner, and Angela Cleveland - Planning & Economic Development Coordinator for assistance on this update and support to the Committee.**

## CEDS GOALS & CROSS CUTTING THEMES

Goals, Strategies and Actions outlined in the CEDS align with a set of common cross-cutting themes and are integral to building and sustaining a resilient, inclusive, and caring economy. The figure below represents the Goals and the Cross Cutting Themes driving the Strategies and Actions of this CEDS update.

COMMUNITY CAPITALS							
GOALS	To support ongoing efforts to collaborate, share resources, build new & strengthen existing partnerships within economic development that balances community capital & regional needs	To sustain a culture of honoring and protecting the people, heritage, and landscape of the region	To protect the natural capital of the region while investing in and supporting climate mitigation, adaptation, and regeneration planning and projects	To provide support for business development, transition, and innovation that supports workforce training, opportunity, livable wage & work-life balance	To supplement what is missing in the skills, training, and education system that directly connects to industry needs in the region	To understand income and equity disparities in the region, create plans for an inclusive environment with access for everyone, and measure progress over time	To study and learn from innovative models around the country and pilot them in the region
CROSS-CUTTING THEMES	COLLABORATION & COLLECTIVE IMPACT	supporting ongoing efforts to collaborate, share resources, build new & strengthen partnerships, and create collective impact within & across sectors of the economy and community capitals					
	PLANNING & ASSESSMENT	identifying areas where additional planning, inventory, and assessments are needed to build a resilient future for the region					
	INVESTING & SUPPORTING COMMUNITY BACKBONE SYSTEM	supporting housing, transportation, childcare, health and food for every person in the region					
	EQUITY, CONNECTIVITY & ACCESS	supporting equitable access and connectivity to resources for obtaining and retaining employment and living a health life in the region					
	BALANCED ECONOMIES	supporting innovative financing, investing, & building of local economies in the region while ensuring a balance between investments in supply & demand and balancing investments between all the forms of community capital					
	INNOVATION, EDUCATION & WORKFORCE DEVELOPMENT	supporting innovation in education and workforce training and providing the support, space, & time for innovation in education and across all sectors of the economy					
	CULTURE, CLIMATE & QUALITY OF LIFE	providing investment and support for the assets that make the region unique such as the region's culture, environment, & quality of life					

## VISION

The region values its people, landscape, unique places, and regional collaboration while supporting a resilient, inclusive, and caring economy that can withstand, adapt, innovate, and transform to meet present and future needs.

## MISSION

North Country Council's mission is to encourage effective community & regional planning for economic development and the conservation of natural, cultural, and economic resources. This is accomplished by providing information, regional advocacy, technical assistance, community education, and direct services to the region.

## SUMMARY BACKGROUND

### WHAT IS AN ECONOMIC DEVELOPMENT DISTRICT (EDD)?

An Economic Development District is a federally designated region by the U.S. Department of Commerce, Economic Development Administration (EDA). North Country Council is responsible for carrying out the various responsibilities associated with the development, maintenance, and implementation of the Comprehensive Economic Development Strategy (CEDS).

In 1975 the North Country Council was designated and consists of northern Carroll County, all of Grafton and Coos counties. By being a designated EDD, the region is afforded enhanced services focused on economic stimulation and resiliency via the CEDS process of various key current economic indicators.

North Country Council is one of nine NH Regional Planning Commissions and has provided planning services since 1973. The scope of responsibilities of the RPC is laid out in NH RSA 36:46. The Council serves 50 municipalities and 25 unincorporated places along with various local organizations in the northern third of the state. RPCs are advisory and do not carry out enforcement.

### Important Note on the Economic Development District Communities

**Coos County:** The entirety of the county is considered part of the EDD and the North Country Council Regional Planning Commission Region (RPC). Those municipalities and unincorporated places include:

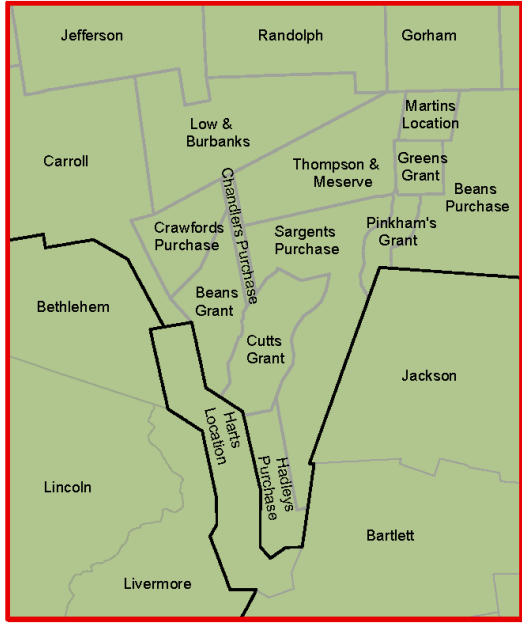
Atkinson & Gilmanton Academy Grant, Beans Grant, Beans Purchase, Berlin, Cambridge, Carroll, Chandlers Purchase, Clarksville, Colebrook, Columbia, Crawford's Purchase, Cutt's Grant, Dalton, Dix's Grant, Dixville, Dummer, Errol, Erving's Location, Gorham, Green's Grant, Hadley's Purchase, Jefferson, Kilkenny, Lancaster, Low & Burbanks Grant, Martin's Location, Milan, Millsfield, Northumberland, Odell, Pinkham's Grant, Pittsburg, Randolph, Sargent's Purchase, Second College Grant, Shelburne, Stark, Stewartstown, Stratford, Success, Thompson & Meserve's Purchase, Wentworth Location, & Whitefield

**Grafton County:** The entire county is part of the EDD while only the northern portion is part of the NCC RPC. Those municipalities and unincorporated places included in the EDD are as follows (**in bold are part of both EDD and RPC**):

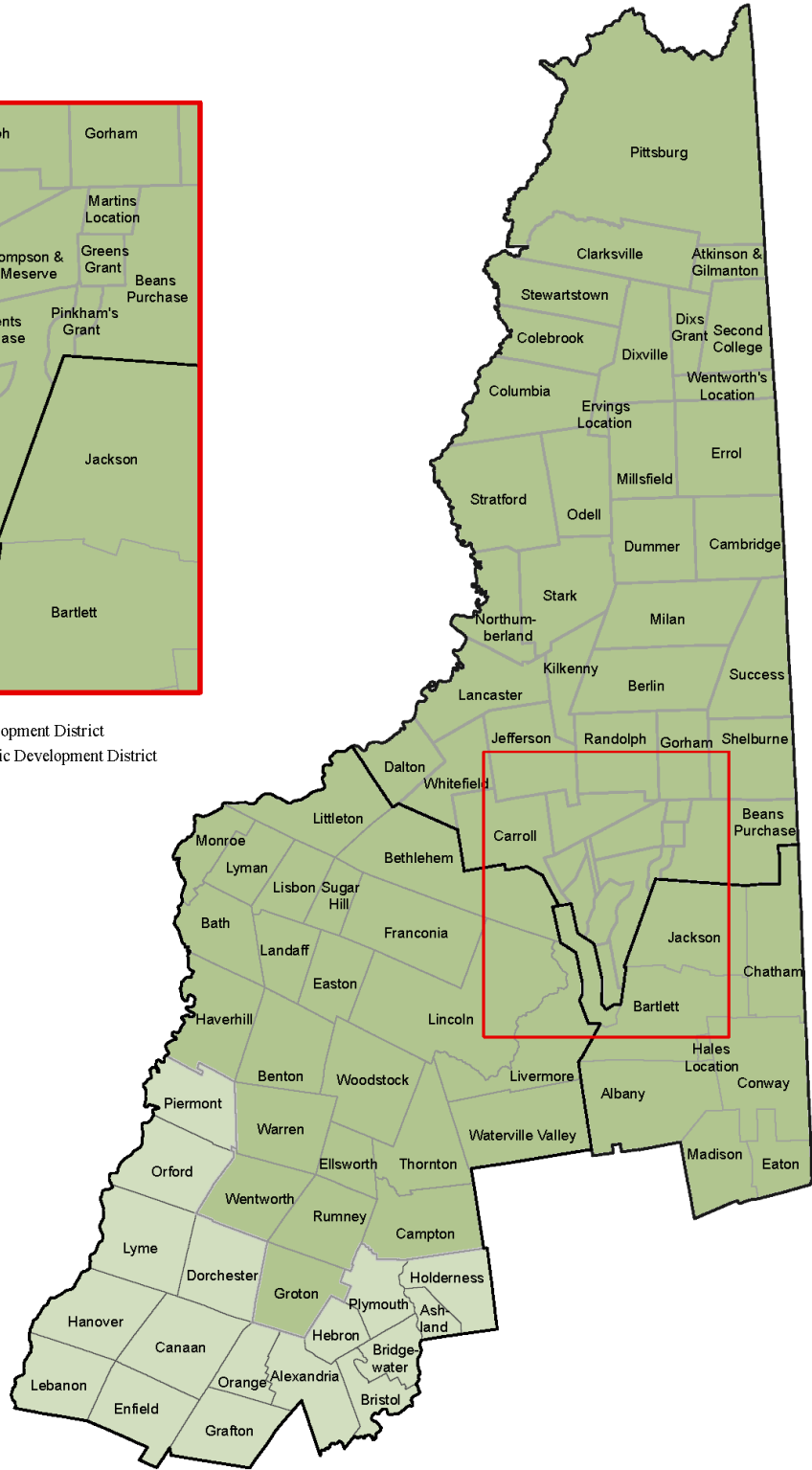
Ashland, Alexandria, **Bath, Benton**, Bridgewater, Bristol, **Bethlehem, Campton**, Canaan, Dorchester, **Easton, Ellsworth**, Enfield, **Franconia**, Grafton, **Groton**, Hanover, **Haverhill**, Hebron, Holderness, **Landaff**, Lebanon, **Lincoln, Lisbon, Littleton, Livermore, Lyman**, Lyme, **Monroe**, Orange, Orford, Piermont, Plymouth, **Rumney, Sugar Hill, Thornton, Warren, Waterville Valley, & Woodstock**

**Carroll County:** Only the northern portion of the county is part of the EDD and RPC. Those municipalities and unincorporated places include:

Albany, Bartlett, Chatham, Conway, Eaton, Hales Location, Hart's Location, Jackson & Madison



- Planning Region & Economic Development District
- Additional Communities in Economic Development District

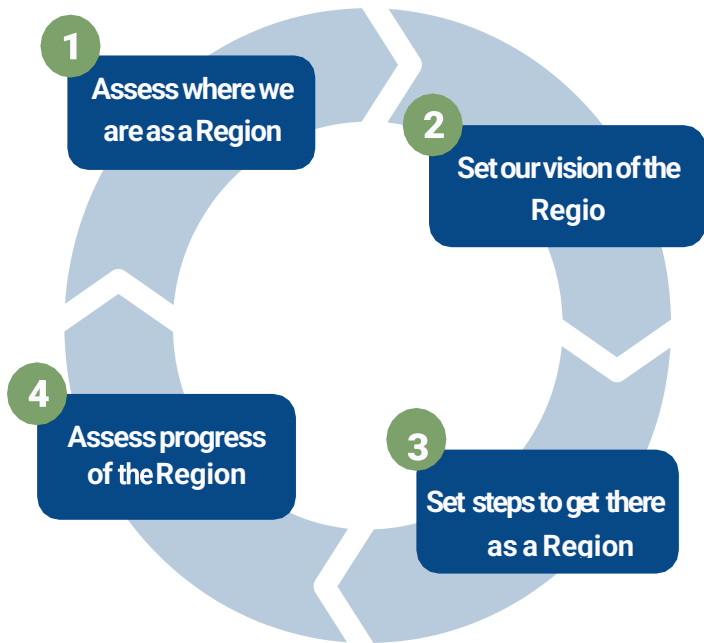




# WHAT IS THE COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDS)?

The Comprehensive Economic Development Strategy (CEDS) is a locally based, regionally driven strategy that engages community leaders, private sector partners, Economic Development Districts (EDDs), and other stakeholders in the planning for our region's future by developing a roadmap for resilient economic development.

## CEDS Process



## What Does an Effective CEDS Look like?

- Identifies and builds on region's strengths and competitive advantages.
- Identifies gaps in resources or expertise
- Promotes cross-sector collaboration
- Helps to expand supply chains and provides support to new and existing industry clusters
- Improves regional resilience and preparedness to plan, respond to, and recover from natural disasters and economic shocks
- Acts as an engaging platform to generate region-wide discussion while serving as a call-to-action for economic development
- Commits to measurable success
- Tells a compelling story about the region's past, present, and future
- Motivates action and implementation

## WHY IS IT IMPORTANT TO THE COMMUNITY?

- Identifies and prioritizes projects for federal and state funders
- Serves as a tool for communities to maximize efficiency and effectiveness
- Helps to take full advantage of the community's strengths and opportunities
- Gives the community a voice in regional economic development planning
- Strategies for fostering economic resilience



## **ROLE AND RESPONSIBILITIES OF THE CEDS COMMITTEE**

The CEDS Committee is responsible for developing and revising the CEDS. This Committee is comprised of individuals that represent a broad range of constituencies in the region. These stakeholders include public officials, state and federal representatives, institutions of higher education, workforce development, healthcare, local business owners, non-profits, and regional leaders.

The CEDS Committee reviews projects and activities in the region that pertain to economic development and job creation. It meets bi-monthly to review and prioritize economic development projects and update the CEDS. Committee meetings also provide a forum for pending projects to present material to the Committee for their consideration. The Committee also creates space within bi-monthly meetings to network, share resources and build upon or strengthen partnerships. The Committee also engages in strategic work sessions to tackle barriers and challenges offering their unique perspective, listening to everyone's contributions, and collaboratively working together to create innovative solutions and support pilot programs and projects.

The CEDS Committee assists new project development by providing applicants guidance and direction on how to support the goals and strategies outlined in the CEDS and builds a resilient, inclusive, and caring economy. The Committee provides support to new economic development opportunities by making introductions and connections to resources and partners in the region and inviting new businesses to be part of a growing economic prosperity while also supporting and protecting the people, landscape, places, and heritage that make the region unique.

## **FOUNDATION FOR THE COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY (CEDS)**

The Goals and Strategies outlined in the CEDS were informed by several important planning processes, community input opportunities, regional data, and analysis work, which was combined to provide direction for supporting resilient, rural economic development for the region. They include:

The planning process and community input from the *North Country Rising Plan* for economic and community recovery and resilience

The Regional data snapshot

The Strengths, Weaknesses, Opportunities, and Threats Analysis

## NORTH COUNTRY RISING (NCR)

With support from the Economic Development Administration under the CARES Act, North Country Council led an economic and community recovery and resiliency planning process during the Covid-19 pandemic to learn about the region's greatest assets and challenges during that time. The vision for [NCR](#) was to create a resilient, inclusive, and caring economy that can withstand, adapt, innovate, and transform in the face of major disruptions. To provide a foundation for the NCR planning process and support this vision, North Country Council established the following guiding principles.

### ***A Resilient Economy for the Region includes:***

Supporting a triple bottom line approach that balances People, Planet, and Profit.

Valuing all eight forms of community capital including Human, Social, Natural, Cultural, Intellectual, Physical, Financial and Political.

Using Systems Thinking methodology when evaluating needs and defining innovative solutions for economic and community resilience.

Investing in our local economy, building connections, leveraging resources, and working together across economic sectors.

These principles support taking an inclusive, whole systems approach to defining economic and community resilience as well as the challenges and barriers to resilience for the rural region. These principles require taking a deeper look at the ways in which industries, infrastructure, accessibility, relationships, and culture, amongst other attributes, are all connected and impact each other in ways that can either build economic and community resilience or deter from it. The result of working with these guiding principles is a more complete understanding of the region's assets and needs and the complex, interconnected solutions that must be developed for the region to recover from recent shocks and be better prepared for future shocks.

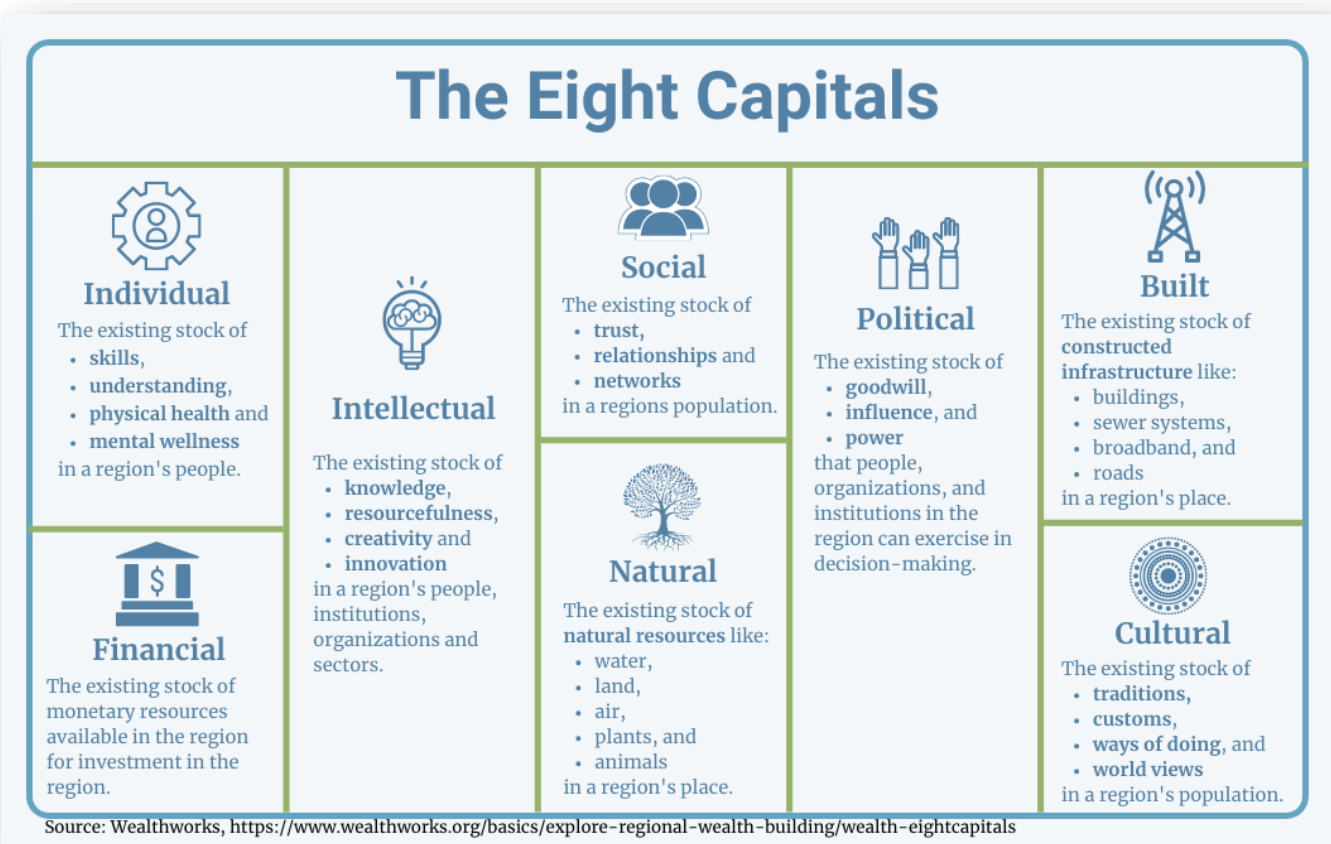
## PLANNING PRINCIPLES

### ***Triple Bottom Line***

Traditionally, economic development planning takes an approach that places financial capital as the primary goal, and at times, this can be at odds with the natural and cultural capital that makes a community and region unique. The North Country is not known for its financial wealth; however, it is known for its social, cultural, and natural wealth that makes the region an attractive place to live, work, play and visit. If economic development goals were not in alignment with those assets, the region could experience financial and economic growth while losing cultural and natural wealth. As was relevant throughout the pandemic, the people of the North Country have a strong relationship with the environment and to each other, which they relied on during the most challenging of times. Economic development strategies should support the local economy and workforce while also strengthening the relationship between the people and the ecosystem.

## Community Capitals

To expand the concept of economic development beyond balancing a triple bottom line, it is also important to the North Country's economy to invest in and support all forms of community capital. There are eight forms of community capital that, when working together, enhance economic development in rural communities and regions. These eight forms of capital help us understand our assets and needs in a more integrated way. The Community Capitals framework clarifies that financial wealth is not the only form of capital flowing throughout region and that other resources such as social and professional relationships, natural environment, infrastructure, land, knowledge, experience, and more can provide not only abundance to the region but the tools needed to ensure economic and community resilience in the future.



## Systems Thinking

The most adaptive, innovative, resilient system known is the ecosystem. It is complex, interconnected, and every element of the system plays a role. As the North Country develops economic strategies, it is essential that each asset and need be evaluated and planned as a part of a larger system. In other words, we must remove the silos that put economic development challenges and resources as separate and/or at odds with housing, childcare, food, equity, transportation, environmental challenges, and resources. They are all interconnected, and the more we develop interconnected solutions, the more likely we are to build sustainable solutions for building long-term economic resiliency.

### ***Local Economy and Collaboration***

The pandemic exposed the fragility of current systems that rely on importing and exporting products and services outside the region. Whereas building and strengthening an economy that can be competitive in a global market may have been the driving force before the pandemic, ensuring the local workforce is healthy and safe while making sure residents had food, shelter, and care became the priority. This has provided a new perspective on what is most important for the region moving forward. When outside markets were closed to the region, local producers and suppliers stepped up to try to fill a void. In addition, businesses, organizations, and community leadership found new ways to collaborate and build a supportive network for the region's response and recovery efforts. As the NC invests in economic development strategies that build resiliency, supporting the local economy, and ongoing collaboration will be essential.

## **PLANNING PROCESS AND COMMUNITY ENGAGEMENT**

The North Country Rising planning process began by reaching out to organizations where the Council was currently collaborating and reaching out to additional organizations to build future collaborations. Emails, phone calls, and Zoom meetings were made with leaderships from the region's Regional Development Corporations, the North Country Health Consortium, North Country Educational Services, Coos County Child Care Task Force, social service leadership through the Granite State United Way Working Better Together initiative, regional Chambers of Commerce, the Neil and Lois Tillotson Foundation and the Conservation Fund.

---

### **The Goals were to:**

Reconnect and check in on the impacts of COVID-19 on their work and organizations.

Ask if they needed any immediate assistance or resources.

Gather their input into framing the North Country Rising planning process.

Request their assistance in gathering people together to inform the planning process.

Ensure we continue to check-in and collaborate during the pandemic and beyond.

---

In addition, North Country Council staff attended the Resiliency Academy hosted by the New Hampshire Small Business Development Corporation and the University of New Hampshire. This forum allowed the Council staff to learn and interact with fellow planners as well as community, business, organizational, and educational leadership across the State. Information from the Academy is woven into the Strategies and Solutions section of this plan as well as in the Resource Section. From those initial conversations, North Country Council began to review and digest the articles, reports, and plans that were shared or suggested as additional data and stories that could help inform the plan. Some resources were focused on addressing long-standing, underlying challenges in the rural region whereas other resources took a broader perspective of the systemic challenges

brought to light in part by the COVID-19 pandemic. Those articles, reports, and plan findings are integrated into this North Country Rising Plan and are shared in the Resource Section.

The Council also engaged with existing North Country Council committees to provide information about the planning process, invited them to participate, and provide updates from community engagement sessions and planning efforts. This included the regional Transportation Advisory Committee (TAC) and the Comprehensive Economic Development Strategy (CEDS) Committee.

North Country Council created an inclusive community engagement process that began early winter 2020.

---

### **The goal of the community engagement process was to:**

Create forums for people to gather, share stories & resources, and work together on a plan for economic & community recovery & resiliency.

Better understand how people, communities, and industries defined resiliency for the region, the economy, and themselves.

Learn about economic and social impacts from the pandemic.

Uncover strategies employed in response to the pandemic.

Define assets and resources that were critical to daily survival and response efforts

Name the region's greatest challenges, barriers, and needs that stemmed from the pandemic or were pre-existing and exacerbated by the pandemic.

Identify projects, programs, and innovative solutions for economic and community recovery and building a more resilient region in the face of future shocks.

---

North Country Council has hosted focus groups across six economic sectors including Food & Agriculture, Arts & Culture, Education, Healthcare, Outdoor Recreation & Tourism, and Small Business. The Council continued to conduct in-person, over-the-phone and Zoom interviews with leadership around the region representing child and family services, entrepreneurs, hospitality, cultural commissions, chambers of commerce, rotary clubs, and the building, trades, and lumber industry. North Country Council set up booths at farmers' markets around the region to poll individuals and vendors, participated in local arts and cultural events, and provided presentations to partner organizations around the region and State.

Throughout the planning process, North Country Council had an open form to submit stories of resilience or to request a meeting/interview with the Council staff. Summary reports from focus group meetings were posted on the Council's website with options to sign up for focus group meetings. The Council also shared a monthly update on the North Country Rising Planning process in the Council's newsletter and provided means for people to contact the Council for more information or to set up a time to talk.

---

## In summary, North Country Council has:

Held 22 focus group meetings, engaging with 142 workers.

Conducted 35 in-person interviews and 14 over-the-phone interviews.

Attended 5 standing meetings with rotary clubs, regional superintendents, childcare task forces, and social service networking meetings engaging with 87 workers and business leaders.

Participated in 4 farmer's markets and 2 Arts & Cultural events, engaging with roughly 70 additional residents, small business owners, and farmers from the region.

Presented the final plan to the public and shared the recording of the final plan presentation online.

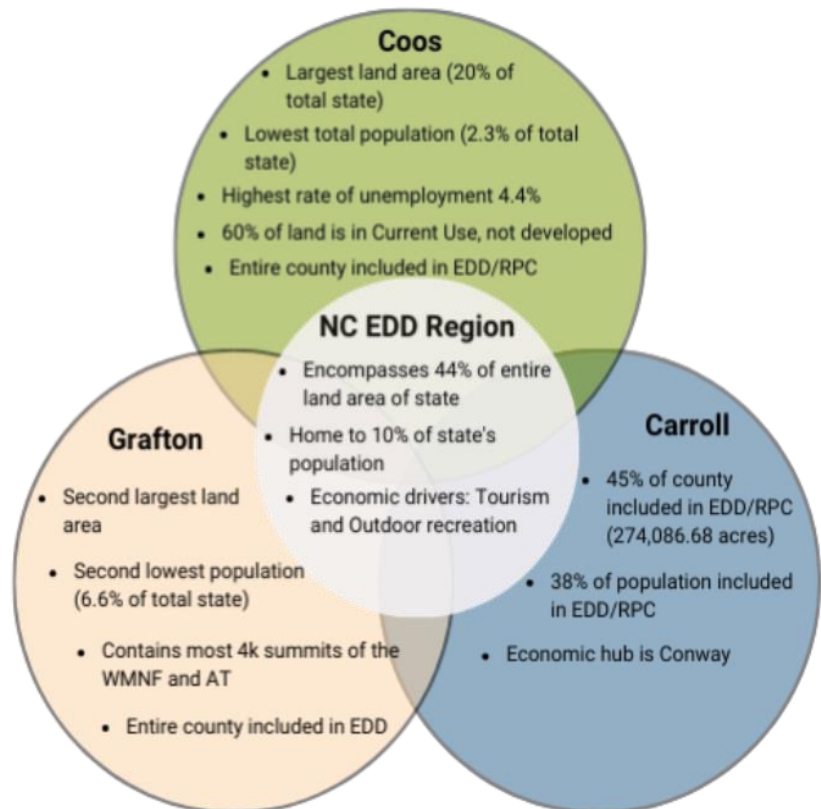
---

## REGIONAL SNAPSHOT AND DATA

### REGIONAL OVERVIEW

The EDD is comprised of three counties and are primarily mountainous, each with their own special features to celebrate. The majority of the region is rural forested land with a large portion established as State and National parks or forests. Coos is home to the headwaters of the Connecticut River and the only in-state international port of entry with Canada; Grafton enjoys the seat of Franconia Notch State Park, host to most of the 4,000-foot summits, and a portion of the Appalachian Trail; Carroll offers pastoral landscapes in the valleys with epic mountain views in the background.

Due to the mountainous and steep slopes covering most of the region, agriculture activity is limited. Along river flood plains there are flats of fertile soil that have been farmed



primarily as small subsistence farms, but there are a handful of larger scale dairy, fruit orchard, and Christmas tree farms. The farms of times gone by have contributed to the rural and pastoral views with old barns and farmhouses that are characteristic of the river valleys with the backdrop of the mountains. More recently, the raw landscape has become more valuable to outdoor recreationists who help drive the heavily relied upon tourism industry.

Historically the land's natural resources of wood were harvested almost to depletion. At the start of the 20<sup>th</sup> century, tourists and outdoor enthusiasts used the established railways previously devoted to industry to access the North Country region. Efforts were made to protect the landscape with the establishment of National and State Forests to foster the newly booming tourism industry and improve stewardship practices of the North Country's natural resources. One of these efforts was the Current Use Taxation (RSA 79-a) that incentivizes landowners to preserve the natural resources or open space in their land in return for a property tax reduction. There are further tax incentives to private landowners who open their land up for recreational use.

The District's vast resources of National and State Parks draws diverse recreation opportunities which support one of the primary economic industries: tourism. Ski resorts, snowmobile trails, camping areas, fishing, hunting, and hiking are some of the celebrated activities in the area. Outdoor recreation business has built sustainability through improving on and expanding the breadth of their experiences. Activities such as zip-lining have been added to many ski mountains to encourage expanded season and resiliency on weather dependent business tourism. Decommissioned railroad beds have been repurposed for use by snowmobiles and ATVs connecting communities with these rail trails and opening new opportunities for tourism that previously did not exist in the smaller, more remote towns and village centers.

In addition to Outdoor Recreation, the district's arts and culture industry is a vital part of the tourism economy as well as a value to residents who appreciate the arts as part of the district's uniqueness. Many artists have chosen to take residence in the region drawing inspiration from the natural surroundings and quaint small towns and villages. In recent history, public art and community performances have grown supporting both social capital and community engagement.

Food and agriculture have historically been part of the district's regional economy and continues to be today. The industry is shifting from large scale farming practices, that still do exist, to more small family farms, niche markets and products, and products developed through homesteading. The industry has declined as the population grows; there is a need to support the protection of agriculture lands, the allowance of food production within conservation spaces, and the training, education, and support for the next generation of farmers to ensure the industry continues to thrive.

The region experienced widespread impacts from the COVID-19 pandemic, and pre-existing challenges in the region were exacerbated. The most significant impacts to the regional economy were related to business closures and adjustments, outdoor recreation, and the region's natural capital, childcare and housing.

North Country healthcare providers prepared for what would become months of emergency response and ongoing trauma, both with patients and from personal experience. The region's social service sector was stretched beyond capacity as homelessness, addiction relapse, tending to the senior population, and a variety of transportation and access needs increased rapidly. The region's education system was truly tested as teachers shifted between in-person and remote learning while responding to the growing needs of children and families adapting to life, work, and school at home. Local farmers could not keep up with demand for food and products as supply chains around the country shut down.



The arts and culture industry came to a halt as performances, exhibitions, galleries, and classes in the arts were subject to social distancing and maximum capacity guidelines established by the Center for Disease Control and Prevention (CDC); an industry that not only supports the tourism economy but provides the rich cultural capital that makes the region unique to its residents. Businesses, organizations, community groups, neighbors, and friends had to adapt to a life of access to less in a region where resources are already scarce in a global crisis.

The following pages take a deeper look into the region’s data and the experienced impacts of COVID-19 pandemic which was used to develop this CEDS strategy.

## POPULATION

### Current Population Characteristics

Indicator	Time Period	NH Total	Total EDD Region	Total RPC Region	Coos County	Carroll EDD/RPC	Carroll County	Grafton EDD	Grafton RPC
<b>Total Population</b>	2020	1,355,244	140,056	82,198	31,486	18,239	48,461	90,331	32,473
	2016	1,327,503	139,432	82,423	32,219	18,049	47,416	89,164	32,155
	Change	↑ 2.1%	↑ 0.4%	↓ -0.3%	↓ -2.3%	↑ 1.1%	↑ 2.2%	↑ 1.3%	↑ 1.0%
<b>Population Under Age 5</b>	2020	63,677	5,624	3,218	1,262	734	1,831	3,628	1,222
	2016	65,048	5,870	3,255	1,257	818	1,849	3,797	1,182
	Change	↓ -2.1%	↓ -4.2%	↓ -1.1%	↑ 0.4%	↓ -10.3%	↓ -1.0%	↓ -4.5%	↑ 3.4%
<b>Population Age 5-19</b>	2020	231,485	22,210	11,363	4,388	2,491	6,553	15,331	4,484
	2016	241,606	23,008	12,574	4,640	2,864	6,970	15,526	5,067
	Change	↓ -4.2%	↓ -3.5%	↓ -9.6%	↓ -5.4%	↓ -13.0%	↓ -6.0%	↓ -1.3%	↓ -11.5%
<b>Population Ages 20-64</b>	2020	814,940	81,081	47,975	18,377	9,924	26,368	52,780	19,674
	2016	811,104	83,839	49,205	19,364	10,691	27,122	53,753	19,132
	Change	↑ 0.5%	↓ -3.3%	↓ -2.5%	↓ -5.1%	↓ -7.2%	↓ -2.8%	↓ -1.8%	↑ 2.8%
<b>Population Age Over 65</b>	2020	245,142	31,141	19,642	7,459	5,090	13,709	18,592	7,093
	2016	211,073	26,697	17,382	6,927	3,684	11,475	16,088	6,781
	Change	↑ 16.1%	↑ 16.6%	↑ 13.0%	↑ 7.7%	↑ 38.2%	↑ 19.5%	↑ 15.6%	↑ 4.6%
<b>Median Age</b>	2020	43	50.4	53.5	48.7	56.4	53.4	43.3	51.95
	2016	42.4	49.55	50.5	47.9	49.6	50.9	42.4	50.55
	Change in Years	↑ 0.6	↑ 0.9	↑ 3.0	↑ 0.8	↑ 6.8	↑ 2.5	↑ 0.9	↑ 1.4

Source: Age and Sex, U.S. Census, ACS, 5-Year Estimates, 2016-2020 and 2012-2016

According to the U.S Census 2020 5-year estimated population the EDD increased by 0.4% which is a change of direction from the previous trend. The EDD’s average age increased by 0.9 years with a

median age of the population around 50.4 years.

Grafton County is unique in that the whole of the county is considered part of North Country Council's EDD, but only the northern portion is included in the RPC. This is important to note as the contrast between the EDD and RPC does not include 17 towns within the Lebanon-Hanover and Plymouth labor market areas. Depending on the trends of focus, the data has been structured with these differences for comparison.

Grafton RPC reported to have an increase of population under the age of 5 (3.4%) and 20-64 years of age (2.8%) between 2020 and 2016 which does not follow the trend when looking at the EDD data. Also of note is a significant decrease in the 5-19 years of age cohort at 11.8%. Grafton EDD however declined in population of the younger group and significantly increased by those over the age of 65, which could largely be attributed to in-migration for retirement. Coos County experienced a blip, reporting an increase in the population under age 5 (0.4%).

As of the 2020 Census there are 140,056 residents in the EDD. That number has grown 0.4% over the last decade. Recently, a portion of that growth has been due to migration (people moving to the area) as opposed to natural increase (new births). Of the EDD's population, 3,732 new persons in the area are due to migration.

Indicator	Time Period	NH	Total EDD	Total RPC Region	Coos County	Carroll EDD/RPC	Carroll County	Grafton County	Grafton RPC
<b>Total Net Migration</b>	2010-2020	54,982	3,732	3,952	78	832	3,849	2,788	1,442

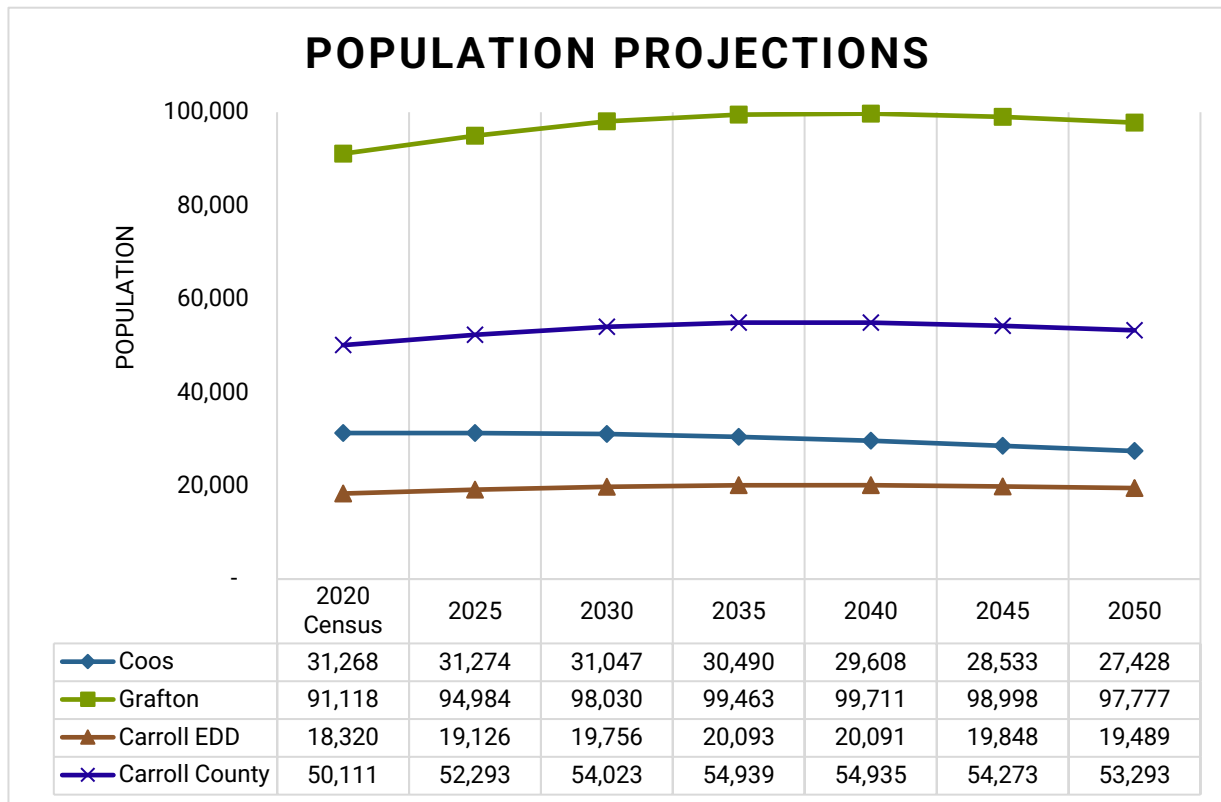
Source: Net Migration, United States Census Bureau Decennial Census and New Hampshire Department of State, 2010-2020 and 2010-2019.

### Projections for the Future

Looking to the future based on population projections from the 2020 US Census supplied by NH Office of Strategic Initiatives (OSI), it's estimated that only Coos County and the North Country Council RPC region will experience population loss. The ED region as a whole is projected to experience a growth in population following the trend for the State.

2020 Population Snapshot & Projection Trends	
State of NH	1,377,529 ↑
NCC EDD	140,706 ↑
NCC RPC	83,107 ↓
Coos County	31,268 ↓
Grafton EDD	91,118 ↑
Grafton RPC	33,519 ↑
Carroll EDD	18,320 ↑

\*2020 Census



Source: State of NH, OSI, County Population Projections, <https://www.nh.gov/osi/data-center/documents/2022-state-county-municipality-projections-tables.pdf>

## Age of Labor Force

There are 7 hub areas for jobs in the region, each employing a concentration of residents from the surrounding area. These markets are centered in: Colebrook, Littleton, Berlin, Haverhill, Plymouth, Conway, and Lebanon. As of 2021, 78,975 people are part of the Labor Force in each of the EDD’s labor market areas. This number had decreased in recent years, declining by more than 2,300 workers since 2018. This decline was observed in each labor market area. It is important to track how many workers are within the EDD and their ages since there is an overall trend of an aging population.

The following table gives the labor force participation rate by age group for those 16 years and older.

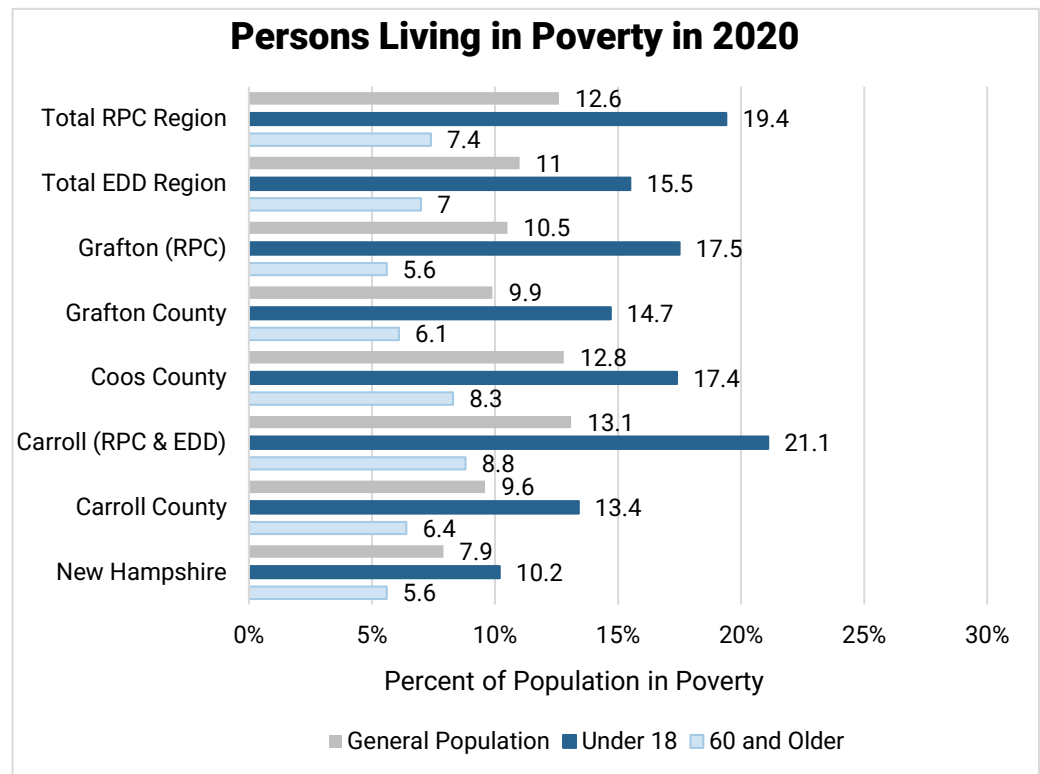
Indicator	NH	Coos County	Carroll County	Grafton County
Age 16-19	49.5%	57.5%	57.8%	32.7%
Age 20-24	80.7%	87.2%	90.2%	70.9%
Age 25-29	88.4%	63.2%	93.1%	82.3%
Age 30-34	85.6%	69.1%	84.1%	86.4%
Age 35-44	86.0%	72.6%	84.2%	85.2%
Age 45-54	86.1%	79.7%	86.1%	84.3%
Age 55-59	80.5%	71.0%	81.4%	79.2%
Age 60-64	66.2%	54.8%	59.1%	62.1%
Age 65-74	31.2%	27.2%	31.6%	31.8%
Age 75 and older	8.5%	8.3%	8.9%	9.6%

Source: Employment Status, U.S. Census, ACS, 5-Year Estimates, 2016-2020

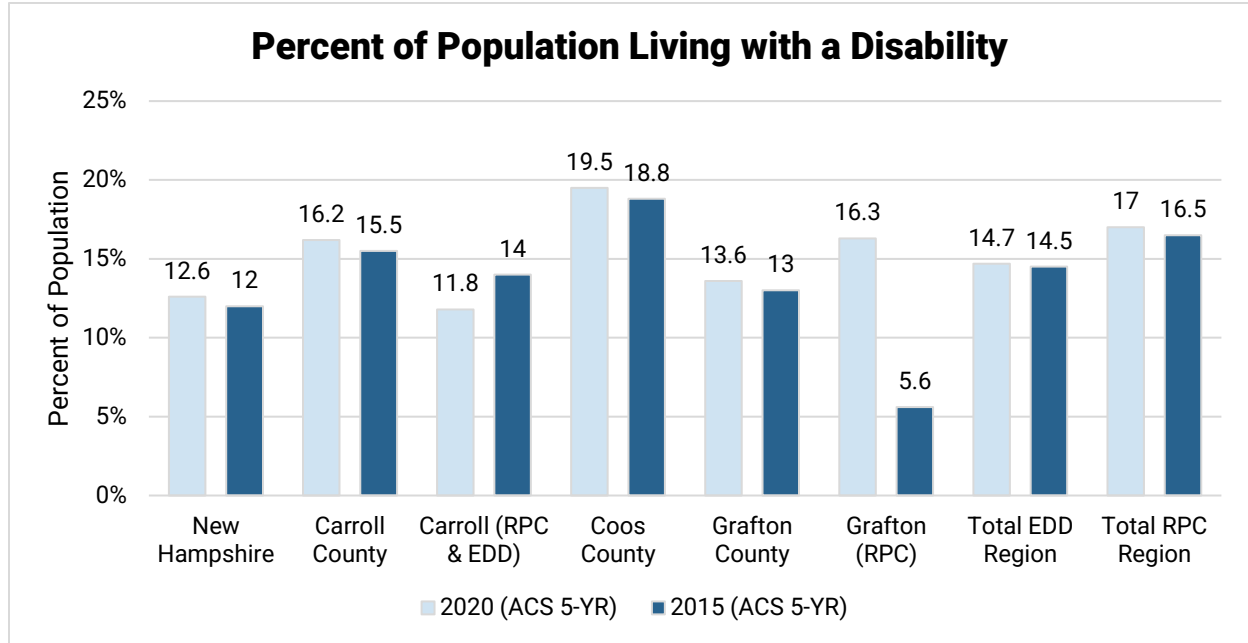
Coos County observes noticeably lower labor force participation rates for adults between 25 and 45 years old. This trend has held true in ACS 5-year estimates in 2018, 2019, 2020 (as shown to the left) and 2021. Several factors likely contribute to this, including access to childcare, disability rates, and potentially the share of unincorporated self-employed people.

## Poverty

In years past, the North Country region has seen higher rates of poverty, compared to those of the state of New Hampshire in our sensitive populations: children under the age of 18 and seniors 60 and older. This trend continues for poverty rates in 2020, with slightly higher percentages of those living in poverty in comparison to 2019. Notably high percentages of people living in poverty within the North Country region include northern Carroll County (municipalities within the EDD) and the RPC region, which does not include southern Grafton County.



## Disability



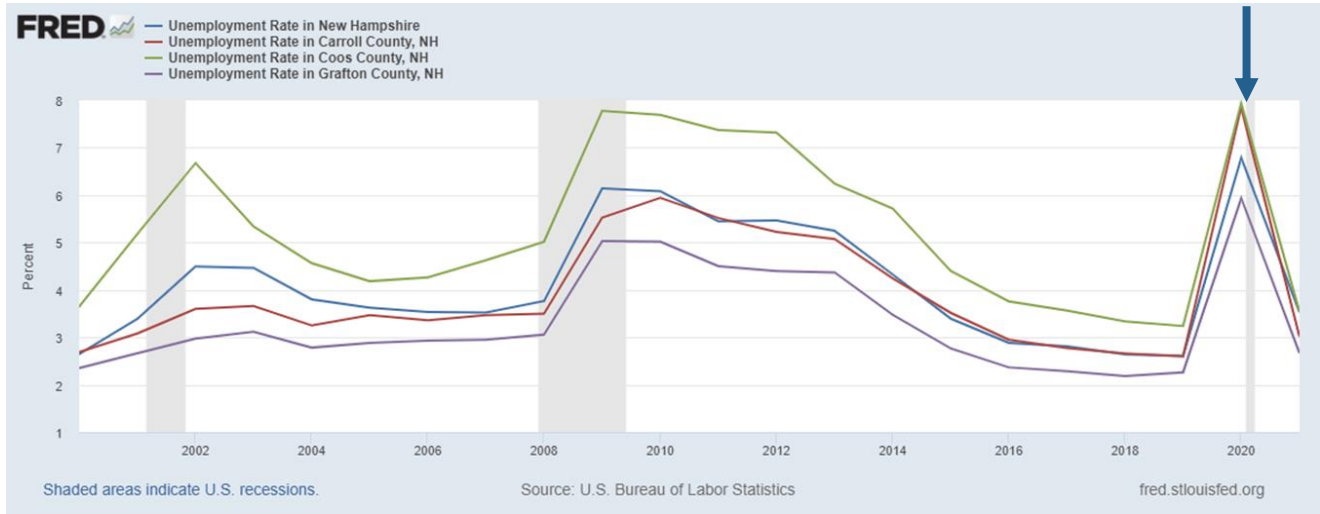
The Americans with Disability Act (ADA) defines a person with a disability as someone who has a record of or is perceived by others to have a “physical or mental impairment that substantially limits one or more major life activities.” Recognizing populations of persons with a disability within the EDD is critical for ensuring access to public accommodations and services. Accommodations and services include, but are not limited to handicap ramps, handicap door assistance, specialized healthcare services, ADA accessible sidewalks and walking paths, handicap parking spaces, and reliable public transportation. (Source: [Introduction to the Americans with Disabilities Act | ADA.gov](https://www.ada.gov/))

The EDD’s percentage of population of people with a disability is higher than the state average and the percentage is growing. Northern Carroll County is the only region that has experienced a decrease in the region’s percent of population that is a person with a disability over the two time periods. While on the other hand, northern Grafton County has seen an increase of 10.7 percentage points between 2011-2015 and 2016-2020. In comparison to trends throughout the state, Grafton has seen a large increase in the percentage of the population living with a disability.

# EMPLOYMENT AND WORKFORCE CHARACTERISTICS

## Unemployment

Over the last two decades, New Hampshire and the EDD’s trends in unemployment rates have correlated with regional and national economic events. Most recently, a drastic increase in unemployment (represented by the grey bar in year 2020, in FRED graph) is a result of pandemic related unemployment. Areas with more service-based occupations, such as Coos and Carroll counties, have experienced greater rates of unemployment.



Source: Federal Reserve Bank of St. Louis, Economic Research, “Unemployment Rate of New Hampshire, Carroll County, Coös County, and Grafton County” Annual, 2000-2021. [Unemployment Rate \(UNRATE\) | FRED | St. Louis Fed \(stlouisfed.org\)](https://fred.stlouisfed.org)

In a survey conducted by the NH Small Business Development Center (SBDC) to assess the impact of COVID-19 on small businesses throughout New Hampshire:

- 37% of respondents whose business is located in the region say that they reduced their hours of operation since February 15, 2020
- 38% say that their business closed temporarily
- 1% say that they closed permanently
- 42% say their business has had no change in its open status since that time
- Respondents whose business is located in the region are more likely than businesses located elsewhere to report having closed temporarily since February 15, 2020<sup>1</sup>

The national average unemployment rate was 14.8% and New Hampshire’s unemployment rate was at 16% in April 2020. Thirty-five of the region’s communities had unemployment rates over 20%. As of April 2021, New Hampshire had recovered to 2.8% unemployment compared to the U.S. at 6.1%. Coos County had the highest average unemployment rate at 3.8%. Carroll County, at 3.3%, ranked second highest for unemployment.<sup>2</sup>

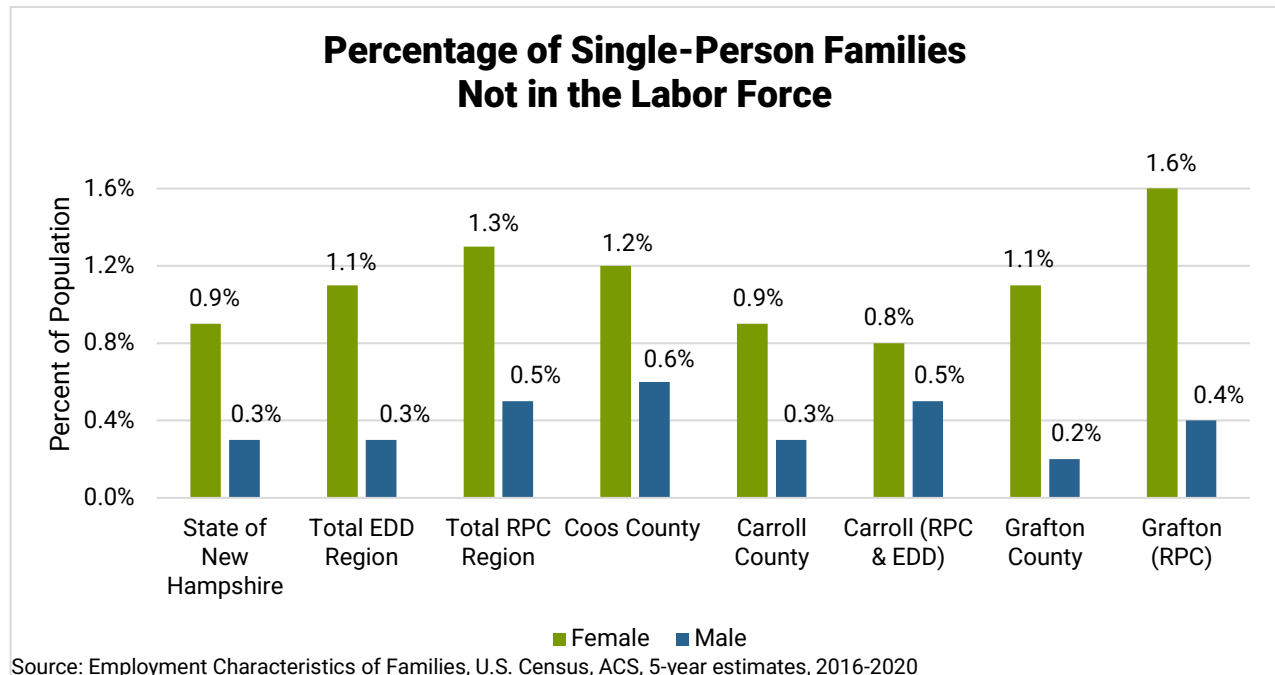
Indicator	Year	State of NH	Coos County	Carroll County	Grafton County
<b>Average Unemployment</b>	2021	3.5%	4.4%	3.8%	3.3%
	2020	6.7%	7.9%	7.7%	5.8%
	2019	2.6%	3.2%	2.6%	2.3%
	2018	2.5%	3.2%	2.5%	2.1%

Source: 2018-2021 NH Local Area Unemployment Statistics-NH Employment Security, Economic & Labor Market Information Bureau, [www.nhes.nh.gov/elmi](http://www.nhes.nh.gov/elmi)

<sup>1</sup> Source: NH Small Business Development Center

<sup>2</sup> Source: Local Area Unemployment Statistics, U.S. Bureau of Labor Statistics

## Unemployment Among Single-Parent Families and Childcare



Unemployment trends of single-parent families show that unemployment among single parent females is significantly higher than their male counterparts. This trend holds true for the regions within the EDD, highlighting that the economic conditions for female single-parent families are likely significantly more strained. Unemployed single parents face a range of barriers that make it challenging to join the labor force. One of which being childcare that is affordable, located in proximity to work and/or home, offers flexible hours of service, and offers a wide range of ages served. Throughout the North Country region, there are only 30 childcare facilities, with a capacity to care for 947 children. This leaves a supply and demand gap of 756 children still in need of care. With few childcare facilities and seats in a large geographic area, access to childcare persists to be a challenge and is a limitation to single parents joining the workforce. It is important to note that childcare is not a fully formal industry and so, this data does not fully capture all childcare. This data does not consider other childcare opportunities such as a babysitter or childcare by a family member. However, childcare throughout the EDD is in short supply, as many facilities have lengthy waitlists. In order to lessen the childcare cap, there would need to be a continual increase in the coming years in the number of facilities and capacity of children.

The childcare industry is essential to supporting all other industries. The region has been challenged with meeting the needs for childcare which has disproportionately impacted women, single-parent households, and low-income families. The pandemic exacerbated these challenges and created a significant childcare crisis in this rural region for parents of school-age children as schools switched from in-person learning to remote and hybrid schedules. These challenges had a profound impact on the workers in the region and impacted people's ability to be available to work.

County	# Of Facilities	Capacity (# of children)	Supply and Demand Gap (# of children without access to care)
Carroll	8	254	188
Coos	10	399	154
Grafton	12	294	414
<b>Total:</b>	<b>30</b>	<b>947</b>	<b>756</b>

Source: U.S. Department of Housing and Urban Development, CPD Maps, June 2022, [CPD Maps \(hud.gov\)](https://www.hud.gov/cpd)

## Educational Attainment of Workforce and Apprenticeships

Indicator	Time Period	NH	Coos County	Carroll County	Grafton County
Less than 9 <sup>th</sup> Grade	2020	1.1%	2.5%	0.6%	1.2%
	2015	1.7%	1.1%	1.8%	1.7%
	Change	↓0.6%	↑1.4%	↓1.2%	↓0.5%
9 <sup>th</sup> to 12 <sup>th</sup> Grade, no diploma	2020	3.3%	6.1%	3.4%	3.6%
	2015	3.6%	6.8%	3.4%	3.8%
	Change	↓0.3%	↓0.7%	0%	↓0.2%
High School or Equivalent	2020	19.6%	30.1%	21.2%	18%
	2015	20.1%	29.5%	24%	19.7%
	Change	↓0.5%	↑0.6%	↓2.8%	↓1.7%
Some College, no degree	2020	12.9%	14.2%	15.3%	11.8%
	2015	13.3%	15%	15.4%	12%
	Change	↓0.4%	↓0.8%	↓0.1%	↓0.2%
Associate degree	2020	7.5%	8.4%	8.7%	6%
	2015	6.7%	8%	7.3%	5.5%
	Change	↑0.8%	↑0.4%	↑1.4%	↑0.5%
Bachelor's Degree	2020	16.5%	9.7%	17.1%	15.1%
	2015	15.3%	8.9%	15.3%	13.9%
	Change	↑1.2%	↑0.6%	↑1.8%	↑1.2%
Graduate or Prof. Degree	2020	10.4%	5.4%	12%	14.7%
	2015	9.1%	4.6%	9.2%	12.3%
	Change	↑1.3%	↓0.8%	↑2.8%	↑2.4%

As of 2020, the EDD and state have experienced an overall downward trend in education attainment levels of residents in achieving some college with no degree and the education levels below. Simultaneously, there has been an overall upward trend in attainment of higher education. This suggests that more residents are completing higher levels of education. For example, the downward trend in Grafton County residents completing high school as their highest level of education, while residents completing an Associate degree has increased, tells us that more residents of Grafton County are continuing education beyond high school. The greatest increase has been in attainment of Graduate or Professional Degrees within Carroll and Grafton counties by 2.8% and 2.4%, respectively.

Note: this is for the age of 25. Source: U.S. Census, ACS, 5-year estimates, 2016-2020 & 2011-2015

During a period where the NC region is facing a shortage of skilled tradespeople, there was a need to review the data regarding apprenticeships for trade jobs. Below is a table of the registered apprenticeships in NH, but it should be noted there may be other non-traditional routes to training in a trade skill that is not captured. This is a segment of the labor force educational attainment that is worth tracking and investing in when considering the future of the region.

Higher education and CTE programs offer opportunities for the EDD to increase intellectual and individual capital. To better understand opportunities within the EDD, where they are currently located, and where they are needed, below is information on higher education opportunities

Indicator	2019	2020	2021
Active Apprentices	2,814	2,796	2,764
New Apprentices	1,403	1,033	1,111
Completed Apprentices	466	516	640
New Programs	37	45	74
New Occupations	38	16	32

Registered Apprenticeships in New Hampshire, *Apprenticeships in New Hampshire*, New Hampshire Employment Security, 2021



and CTE programs. CTE or, career and technical education, provides students with the needed knowledge, skills, and training to succeed in future careers. The training for future careers varies by CTE program. CTE programs throughout the EDD and what they offer for training can be viewed in the following table. For a more extensive breakdown of what career trainings are available within each CTE program, please visit, [New Hampshire's Department of Education Career & Technical Education Programs 2020-2021](#).

Career Clusters	Location of CTE Program				
	Berlin	Conway	Littleton	Plymouth	Whitefield
Ag., Food & Natural Resources					✓
Architecture & Construction	✓	✓	✓	✓	
Arts, A/V Tech & Communications	✓	✓	✓	✓	
Business Management & Admin		✓	✓		
Education & Training	✓	✓	✓		
Finance		✓	✓		
Government & Public Admin					✓
Health Sciences	✓	✓	✓	✓	
Hospitality & Tourism		✓		✓	✓
Human Services					
Information Technology		✓	✓		✓
Law, Public Safety, Corrections & Security		✓	✓		✓
Manufacturing	✓	✓	✓		✓
Marketing		✓		✓	
Science, Technology, Engineering & Mathematics	✓	✓			
Transportation, Distribution & Logistics	✓	✓	✓	✓	

CTE Program Grid- 2021, CTE Programs in New Hampshire, New Hampshire Department of Education

Although there are four institutions of higher education within the EDD, three are within southern Grafton County. Additionally, all opportunities to earn a degree higher than an Associate's are in southern Grafton County. Higher education opportunities are limited for residents of Coos, Carroll, and northern Grafton County and access would require travel. Lack of opportunities also makes it difficult to retain residents for future employment when it is necessary to leave to receive an education.

Institution	Location	Degrees Available			
		Associate	Bachelor	Masters	Doctorate
Dartmouth College	Hanover		✓	✓	✓
Upper Valley Graduate School of Education	Lebanon			✓	
White Mountains Community College	Berlin, Littleton, Conway	✓			
Plymouth State University	Plymouth	✓	✓	✓	✓

Colleges & Universities Approved to Operate in the State of New Hampshire, Higher Education in New Hampshire, New Hampshire Department of Education

## Industry

Building off the 2018 data from the Arnett Development Group, supplemented with 2019 On The Map Census data, the top employed industries have been consistent since at least 2012. Over the years and throughout the North Country, Accommodation & Food Services, Healthcare & Social Assistance, Retail Trade, Educational Services, and Manufacturing have been ranked as the top industry employers.

Highest Employed Industries by County						
	Carroll		Coos		Grafton	
1.	Education, Healthcare & Social Assistance	25.1%	Education, Healthcare & Social Assistance	25.2%	Education, Health Care & Social Assistance	33.5%
2.	Arts/Entertainment & Accommodations/ Food Service	12.2%	Retail Trade	14%	Arts/Entertainment & Accommodations/ Food Service	11.9%
3.	Retail Trade	11.1%	Arts/Entertainment & Accommodations/ Food Service	11.2%	Retail Trade	10.6%
4.	Construction	10.9%	Manufacturing	9.4%	Manufacturing	8.9%
5.	Manufacturing	9.1%	Construction	9%	Professional, Scientific and Management	8.2%

Source: American Community Survey, 5-Year 2018-2022, DP03

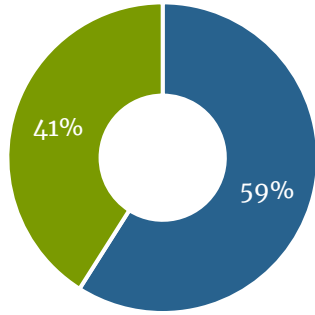
## Cluster Mapping

In an effort to better understand the characteristics of the region's industry clusters data from the Harvard Business School Cluster Mapping project was reviewed. A cluster is a regional concentration of related industries in a location and an industry cluster measures industries by comparing each other according to GDP, job growth, regional competitiveness, regional specialization, and earnings. The series of charts & tables below explore these cluster by county with the most recently available data from <https://clustermapping.us/cluster>.

### Industry Clusters for Grafton County, NH

Local Clusters	Traded Clusters
Local Health Services	Education & Knowledge Creation
Local Hospitality Establishments	Hospitality & Tourism
Local Real Estate, Construction & Development	Metalworking Technology
Local Retailing of Clothing and General Merchandise	Distribution & Electronic Commerce

Share of Employment



■ Local ■ Traded

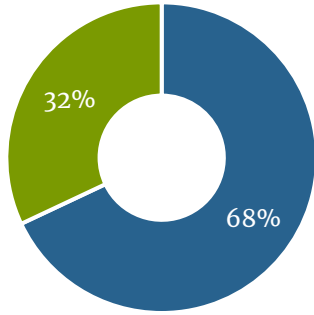
Grafton County - Average Wages by Cluster



Industry Clusters for Coos County, NH

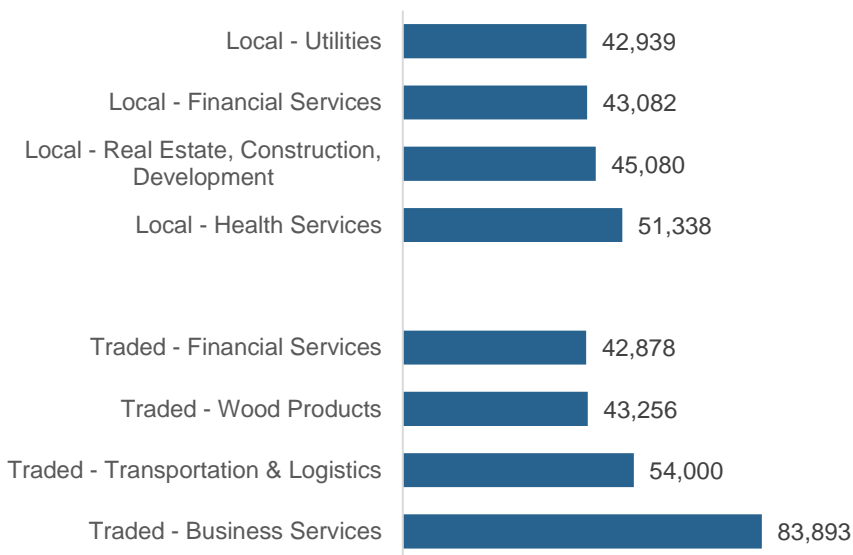
Local Clusters	Traded Clusters
Local Health Services	Hospitality & Tourism
Local Community & Civic Organizations	Distribution & Electronic Commerce
Local Motor Vehicle Products & Services	Paper & Packaging
Local Hospitality Establishments	Forestry

Share of Employment

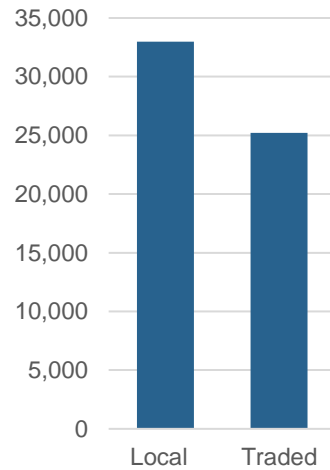


■ Local ■ Traded

Coos County - Average Wages by Cluster



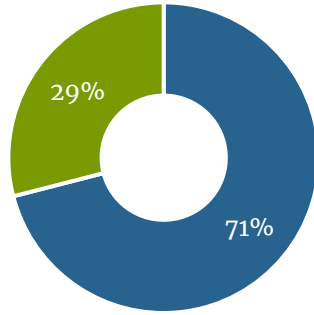
Average Wages Local Vs. Traded Clusters



Industry Clusters for Carroll County, NH

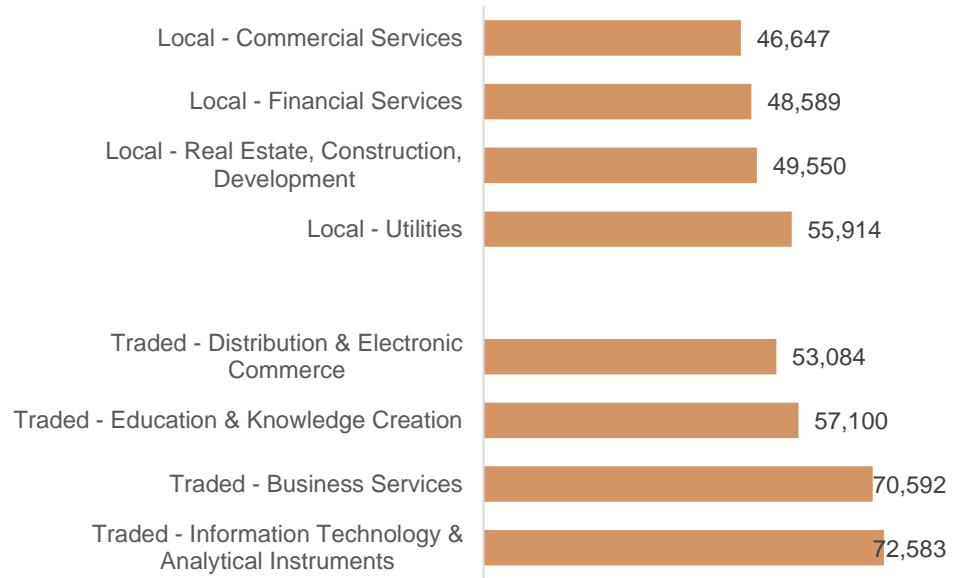
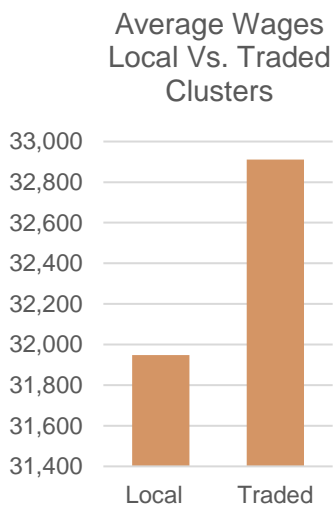
Local Clusters	Traded Clusters
Local Hospitality Establishments	Hospitality & Tourism
Local Health Services	Distribution & Electronic Commerce
Local Real Estate, Construction & Development	Business Services
Local Retail of Clothing & Merchandise	Plastics

Share of Employment



■ Local ■ Traded

Carroll County - Average Wages by Cluster



Top Regional Clusters for Carroll, Coos, & Grafton County				
	Top Identified Regional Clusters	Examples	Job Growth Rating	Regional Impact Rating
1.	Local Health Services	Pharmacies, optical goods stores, dentist offices	71	71
2.	Education & Knowledge Creation	Colleges / universities / professional schools, computer training	63	63
3.	Electric Power Generation	Hydroelectric power generation, biomass electric generation	55	37
4.	Lighting & Electrical Equipment	Current-carrying wiring device manufacturing	52	33
5.	Information Technology & Analytical	Transformer, capacitor, resistor, coil, and other inductor manufacturing	51	30
6.	Local Hospitality	Restaurants, gift / souvenir shops, sports and recreation, golf courses	46	26

Source: New Hampshire Counties, Arnett Development Group, Emsi Q3 2018 Data Set

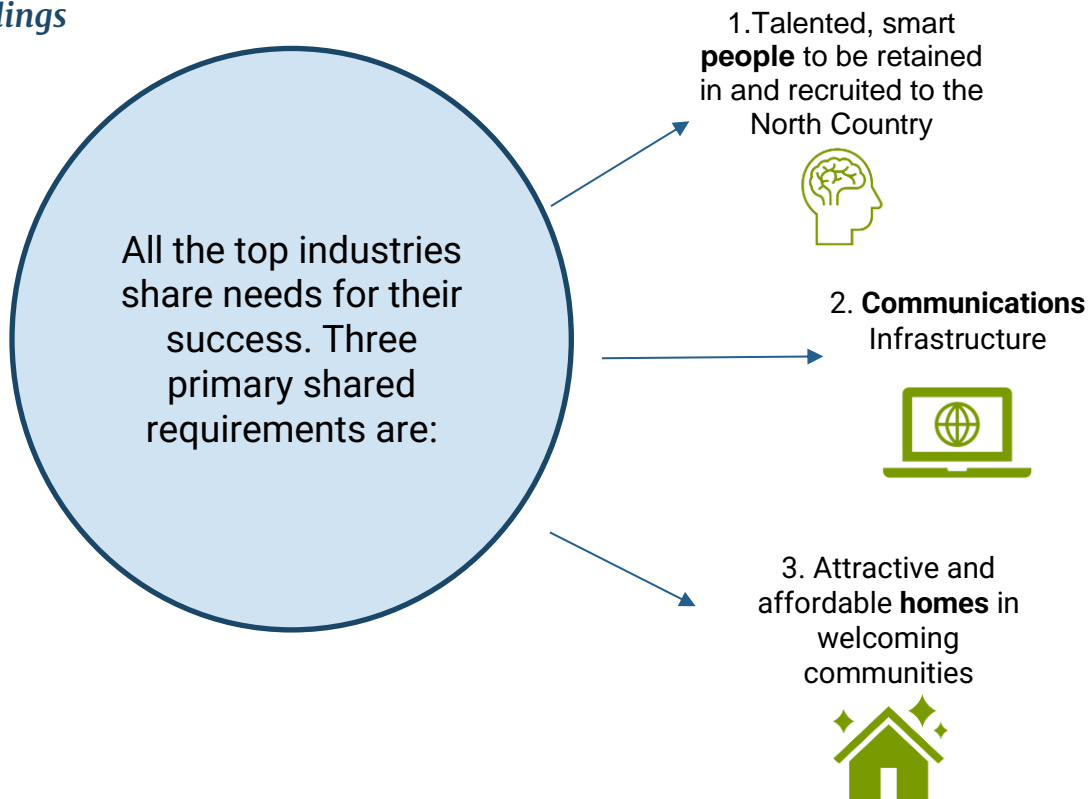
### ***Understanding Market Leakages***

Market leakages can be summarized as the amount of an industry being produced outside of the region rather than being produced locally, which would benefit regional resilience. For instance, a \$1 billion industry could have only 10% "leaked," meaning 90% is produced in the region but the remaining 10% is from outside. This small percentage can cause a significant market loss and emphasizes that the industry value and leakage percentage is variable. As the Economic Trends summary indicated, the EDD has a significant "leakage" in Manufacturing (92%, \$2 Billion) and Finance & Insurance (65%, \$1.1Billion). The chart to the right illustrates those industry leakages.

<b>Industry</b>	<b>Percent Leakage by County</b>			
	<b>Carroll %</b>	<b>Coos %</b>	<b>Grafton %</b>	<b>Orleans, VT %</b>
Real Estate & Rentals	70	47	41	46
Financial & Insurance Services	33	15	35	23
Professional, Scientific, & Tech Services	41	13	52	22
Manufacturing	8	5	8	12
Retail Trade	34	28	33	27

Source: New Hampshire Counties, Arnett Development Group, Emsi Q3 2018 Data Set

## Key Findings

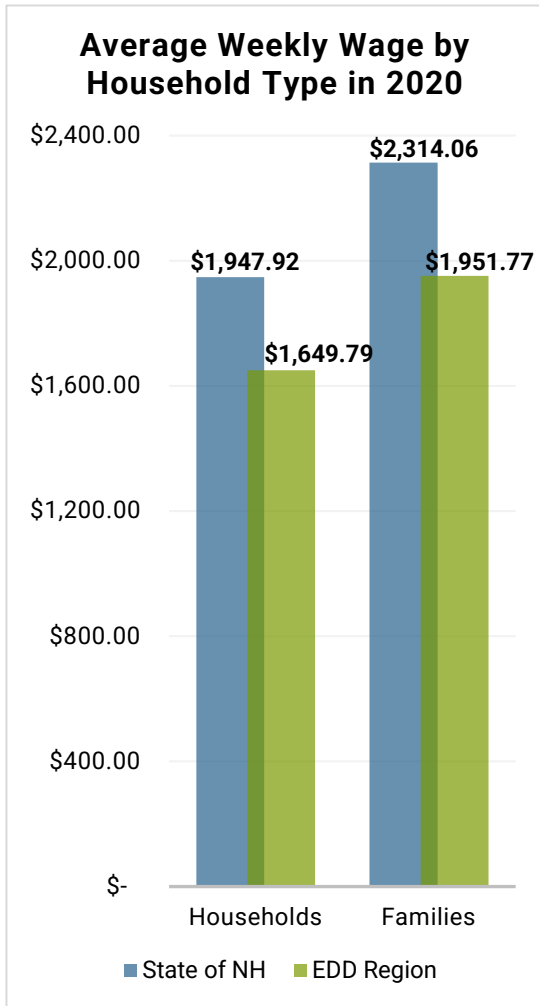


### A Strategic Response to the above findings should include:

- Project to both the local and regional markets a "brand" that incentivizes people to stay or come,
- Demonstrate market demand for world-class communication systems to attract the needed private and public investment; and
- Demonstrate a local supply of attractive and compelling places to call home and welcoming, amenity-rich hometowns.

## Wages

Data gathered on average weekly wages in 2020 by household type illustrated that households in the EDD receive an average of \$298.13 less weekly. Using data from the New Hampshire Economic and Labor Market Information Bureau, the average wage is broken down by labor market areas (LMAs). All and top industries across the labor markets on average pay similar wages across all experience levels, except for in the Lebanon-Hanover LMA. In both industry breakdowns, average and experienced wages for the Lebanon-Hanover LMA is significantly higher.



2020 ACS 5-yr Estimate S1902

Breakdown of Wages for the Highest Employed Industries in the EDD Labor Market Areas in 2020				
	Entry-Level Wage	Average Wage	Experienced Wage	Est. % of Population Employed in Industry
<b>Northern NH</b>				
Average Wages of Top 4 Industries:	\$11.06	\$17.39	\$20.54	41%
Office and Administrative Support	\$12.37	\$17.99	\$20.80	15%
Food Preparation and Service	\$8.84	\$13.53	\$15.87	10%
Sales and Related Occupations	\$10.40	\$19.84	\$24.55	9%
Production/Manufacturing	\$12.63	\$18.18	\$20.95	8%
Average Wages of All Industries:	\$11.53	\$22.57	\$28.08	
<b>Conway-Wolfeboro</b>				
Average Wages of Top 4 Industries:	\$11.14	\$17.47	\$20.64	48%
Sales and Related Occupations	\$10.42	\$17.05	\$20.36	14%
Office and Administrative Support	\$12.51	\$18.44	\$21.41	13%
Food Preparation and Service	\$9.60	\$14.23	\$16.54	13%
Educational Instruction and Library	\$12.02	\$20.16	\$24.23	7%
Average Wages of All Industries:	\$11.38	\$21.39	\$26.40	
<b>Lebanon-Hanover</b>				
Average Wages of Top 4 Industries:	\$12.85	\$24.01	\$29.58	37%
Office and Administrative Support	\$14.79	\$21.21	\$24.42	12%
Sales and Related Occupations	\$11.08	\$18.02	\$21.76	9%
Educational Instruction and Library	\$15.69	\$42.07	\$55.25	8%
Food Preparation and Serving	\$9.84	\$14.54	\$16.89	7%
Average Wages of All Industries:	\$13.89	\$31.93	\$40.95	
<b>Plymouth</b>				
Average Wages of Top 4 Industries:	\$11.90	\$19.58	\$23.41	46%
Food Preparation and Service	\$8.60	\$13.25	\$15.57	13%
Office and Administrative Support	\$12.24	\$18.11	\$21.05	13%
Sales and Related Occupations	\$10.61	\$15.61	\$18.11	11%
Educational Instruction and Library	\$16.16	\$31.33	\$38.91	9%
Average Wages of All Industries:	\$11.37	\$21.44	\$26.48	

Source: New Hampshire Occupational Employment & Wage Statistics. 2020 Substate Areas. Accessed: <https://www.nhes.nh.gov/elmi/products/oes-prod.htm>



## Income

In 2021, all of the EDD was well below the median annual income compared to that of the state of New Hampshire. In previous years, Coos County would be the only county in the region that would fall below the state median income. Carroll and Grafton County have also dropped below the state median; however, Coos County's median household income is still significantly lower than the rest of the EDD. Understanding the income variability is key to recognizing how clusters of industries in the southern portion of the EDD drive median income higher; not just within the respective county the industry exists, but also for the whole EDD.

### Income Variability By County

Compared to the NC, including bordering areas of Vermont and Main, Grafton county differs significantly by "having substantial income from non-resource, non-amenity employers such as the Dartmouth Hitchcock Medical Center, Dartmouth College and some diverse industries."

Source: Challenge and Hope in the North Country,; Lawrence C. Hamilton, Linda M Fogg, Curt Grimm; Carsey School of Public Policy, UNH, December 5, 2017

## Trends in Income

Indicator	Time Period	State of NH	Total EDD Region	Total RPC Region	Coos County	Carroll County	Carroll EDD/RPC	Grafton EDD	Grafton RPC
Median Household Income	2020	77,923	60,387	57,636	53,438	68,489	61,813	69,750	59,721
	2015	66,779	51,771	50,044	43,875	55,208	55,208	53,281	50,290
	Change	↑ 16.7%	↑ 16.6%	↑ 15.2%	↑ 21.8%	↑ 24.1%	↑ 12.0%	↑ 30.9%	↑ 18.8%
Median Family Income	2020	97,001	73,875	72,984	64,583	80,750	80,385	81,250	74,063
	2015	81,726	63,098	62,050	55,833	63,824	67,708	64,905	63,750
	Change	↑ 18.7%	↑ 17.1%	↑ 17.6%	↑ 15.7%	↑ 26.5%	↑ 18.7%	↑ 25.2%	↑ 16.2%
Average Per Capita Income	2020	41,234	38,634	37,753	30,142	47,620	52,352	40,478	39,737
	2015	34,362	30,310	28,927	24,702	34,055	35,451	32,574	30,866
	Change	↑ 20.0%	↑ 27.5%	↑ 30.5%	↑ 22.0%	↑ 39.8%	↑ 47.7%	↑ 24.3%	↑ 28.7%

Trends in Income, Source: U.S. Census, ACS, 5-year estimates, 2020 & 2015. Tables: S1903 and DP03

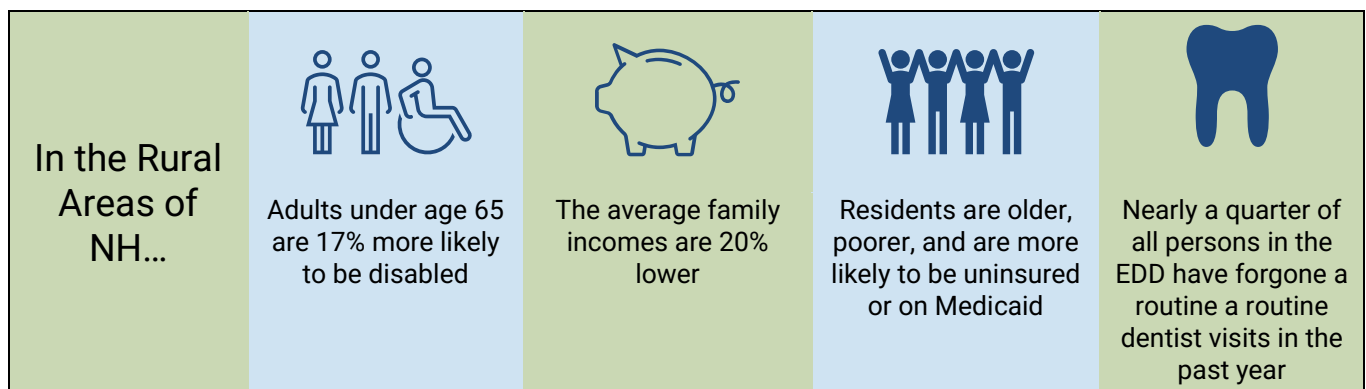
## REGIONAL HEALTH INDICATORS

Within the EDD, many people are challenged with access to medical care, health insurance, and lack the opportunity to improve the current state of their health. The North Country Healthcare Community Health Needs Assessment identified that the most critical health concerns for persons living in the North Country included “drug abuse, lack of dental insurance, cost of prescription drugs, lack of physical exercise, cost of healthy foods, [and] alcohol abuse.” Additionally, within the North Country Healthcare Community Health Needs report, the geographic region is defined as including all of Coos County and Grafton County, “as well as communities in northeastern Vermont and western Maine”. The North Country also faces unique challenges in relation to health due to the rural setting. The rural areas of New Hampshire are known to face several challenges including lower family incomes, an aging population, and higher rates of residents being uninsured.

Health Indicators		
Prevalence of	North Country (Coos and northern Grafton County)	New Hampshire
Diabetes	13%	9%
Overweight	29%	35%
Obesity	34%	27%
Asthma	16%	11%
Hypertension	37%	31%
Heart Attack	7%	4%
High Cholesterol	44%	39%

Source: North Country Public Health Region Community Healthy Improvement Plan, North Country Health Consortium, 2015-2017

Source: North Country Healthcare 2016 Community Health Needs Assessment: Implementation Strategy; April 1, 2016



Sources: New Hampshire Rural Health Issue Brief, 2014 and North Country Healthcare 2016 Community Health Needs Assessment: Implementation Strategy; April 1, 2016; and Challenge and Hope in the North Country, Carsey School of Public Policy, UNH. Hamilton Lawrence; Fogg, Linda M.; and Grimm, Curt; Issue Brief #130, Fall 2017.

## Mental Health and Substance Abuse

Historically, resources for substance abuse have been scarce in the region, but there has been a growing trend in regional and state initiatives focused on strengthening workforce resiliency. One such initiative, Recovery Friendly Workplaces, was piloted by Governor Chris Sununu in early 2018 to assist workplaces in the state with employees who are struggling with substance abuse and recovery. The mission of providing a recovery friendly workplace is to support and equip business owners with the resources needed “to foster a supportive environment that encourages success of their employees in recovery.” In the NC Region there are 35 participating employers designated as a “Recovery Friendly Workplace”. The top industries represented by these employers are healthcare, recovery centers, manufacturing, manufacturing, and community services.

Source: Recovery Friendly Workplace, press conference March 17,2018. <https://www.recoveryfriendlyworkplace.com/>

### “Recovery Friendly Workplaces” in the North Country Region




Source: Recovery Friendly Workplace NH Designees. <https://www.recoveryfriendlyworkplace.com/designees>

## FOOD INSECURITY

The conditions for accessing food in the EDD can be significantly challenging. Rural areas are susceptible to an increased lack of access to full-service grocery stores. The USDA Economic Research Service offers an atlas to examine food access in relation to low income and low access by census tract. Within the EDD, there are 22 communities where at least a portion of residents (at least one census tract within the town) struggle with food access due to their proximity to a store, living at least 10 miles from a grocery store in a rural area. Although the issue is seen in each county within the region, it is a more common issue within Coos County. Additionally, past research on food insecurity characteristics in the state illustrated “a striking pattern” where there was “a high prevalence of illness in the northern portion of the state, the same area with the least access to full-service food outlets.”

Following is a list of communities, broken down by county, where at least a portion of the residents do not have easy access to a grocery store:



**Food Insecurity Definitions:**

**Low food security-** reports of reduced quality, variety, or desirability of diet. Little or no indication of reduced food intake.

**Very low food security-** reports of multiple indications of disrupted eating patterns and reduced food intake.

[Defined by USDA](#)

### CARROLL COUNTY:

Conway, Albany, Bartlett

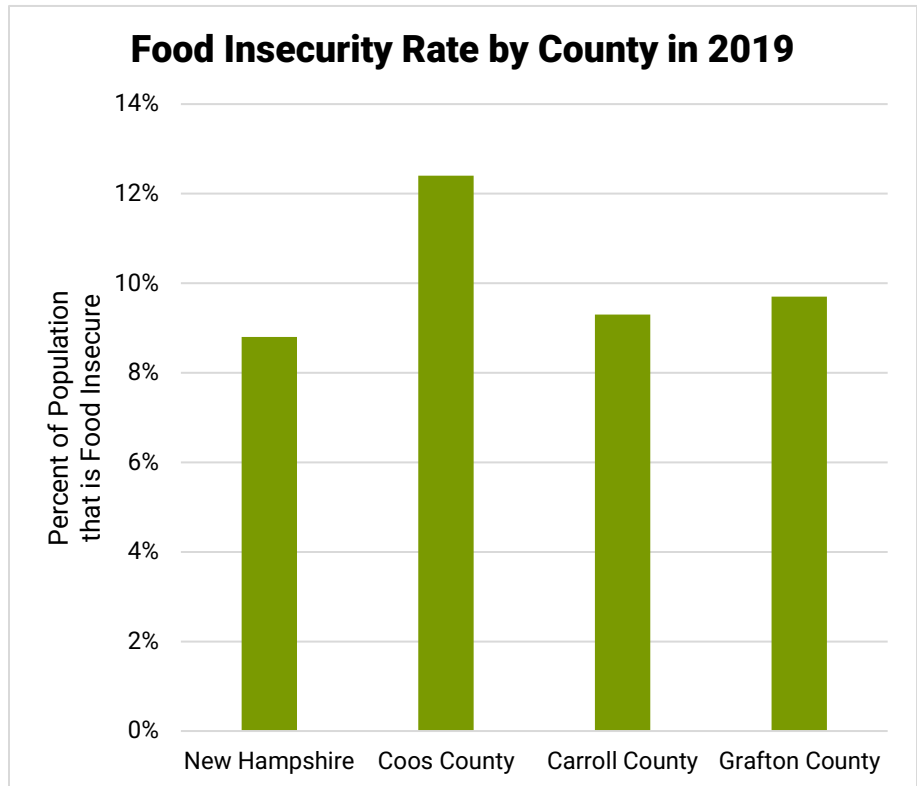
### COOS COUNTY:

Atkinson & Gilmanton Academy  
Grant, Dix's Grant, Second  
College, Wentworth's Location,  
Errol, Cambridge, Milan,  
Success, Dixville, Millsfield,  
Dummer, Berlin

### GRAFTON COUNTY:

Alexandria, Benton, Grafton,  
Orange, Plymouth, Warren,  
Woodstock

The USDA Summer Food Service  
Program in Coös County, New  
Hampshire. Jean Bessette, October 30,  
2018. [USDA ERS - Go to the Atlas](#)



Source: Gundersen, C., Strayer, M., Dewey, A., Hake, M., & Engelhard, E. (2021). Map the Meal Gap 2021: An Analysis of County and Congressional District Food Insecurity and County Food Cost in the United States in 2019. Feeding America.

# INFRASTRUCTURE

## Transportation

The EDD consists of nearly half of all the land area in the state, emphasizing the rural character of the region and necessity of access to transportation. The rural nature of the region’s transportation infrastructure exacerbates negative impacts, making repairs and maintenance more costly.

<b>A Look at Regional Infrastructure</b>			
<b>Transportation Linkages</b>	<b>Key Highway Systems</b>	<b>Transportation Challenges</b>	<b>A Glance at the Scenic Byway System</b>
<p>The existing transportation linkages in the region serve as a critical lifeline of the EDD economy. Linkages include networks of roads, railways, and airports which allow for exporting of regionally produced products while also being a key pillar of support to the tourism industry.</p>	<p>The EDD is home to five major highways which traverse the region. US 2 and US 302 run east to west; US 3 and NH 16 run north to south; and Interstate 93 runs north to south through the heart of the planning region.</p>	<p>Transportation is significantly challenged by severe weather events, mountain passes, and major transportation routes which pass directly through many village centers. However, what our transportation system lack in efficiency is countered by their unparalleled scenic and aesthetic quality.</p>	<p>Currently there are five state-designated scenic byways: Moose Path Trail, Presidential Range Trail, Woodlands Heritage Trail, and the Mountain Road in Weeks State Park. Additionally, there are two federally designated byways, White Mountains Trail, and Kancamagus Highway. In the southern towns of Grafton County there are two more state-designated byways, Lakes Region Tour, and the Enfield Shaker Village Scenic Byway.</p>

## Transportation Type

Indicator	Time Period	NH	Total EDD Region	Total RPC Region	Coos County	Carroll (RPC & EDD)	Grafton County	Grafton (RPC)
<b>Drove Alone (Car, Truck, or Van)</b>	2020	567,386	51,167	31,028	10,865	7,213	33,089	7,213
	2015	551,578	50,887	31,148	11,283	7,442	32,162	12,423
	Change	↑3%	↑0.5%	↓0.3%	↓4%	↓3%	↑3%	↓42%
<b>Carpooled (Car, Truck, or Van)</b>	2020	54,530	6,491	3,644	1,384	706	4,401	1,554
	2015	54,027	5,805	3,532	1,418	647	3,740	1,467
	Change	↑1%	↑12%	↑3%	↓2%	↑9%	↑18%	↑6%
<b>Walked</b>	2020	14,215	2,434	1,258	275	219	1,940	764
	2015	14,701	3,198	1,502	474	352	2,372	676
	Change	↑3%	↓24%	↓16%	↓42%	↑37%	↓18%	↑13%
<b>Public Transportation (excluding Taxicabs)</b>	2020	5,234	532	86	36	31	465	16
	2015	5,382	627	66	17	11	599	38
	Change	↓3%	↓15%	↑30%	↑112%	↑182%	↓22%	↓58%
<b>Taxicab, Motorcycle, Bicycle, or Other Means</b>	2020	8,415	1,665	875	475	66	1,124	334
	2015	8,243	1,346	503	147	126	1,073	203
	Change	↑21%	↑24%	↑74%	↑223%	↓48%	↑5%	↑65%
<b>Worked at Home</b>	2020	57,076	4,998	2,996	1,003	823	3,172	1,170
	2015	38,662	3,282	2,124	793	564	1,925	767
	Change	↑48%	↑52%	↑41%	↑26%	↑46%	↑65%	↑53%

Source: Commuting Characteristics by Sex, S0801, U.S. Census, ACS, 5-year estimates, 2016-2020

Within the North Country, there are few options for public transportation within and between municipalities. One option within the region is Tri-County Transit, a division of the Tri-County Community Action Program. Tri-County Transit offers bus services throughout Coos, Carroll, and northern Grafton County. The service routes span over 3,000 square miles of the North Country, including flex routes, door-to-door service, long-distance medical program, and Medicaid trips. These services run Monday through Friday, with some additional services on Saturday. Tri-County Transit routes include stops at stores, common areas, and medical facilities. Stops can also vary upon request to help fulfill rider needs. Over the period of one year, from July 1, 2021, to June 30, 2022, Tri-County Transit had a total of 18,134 riders. In this time, Coos County serviced the most riders, with a total of 13,593. Carroll County serviced 3,624 and Grafton County serviced 917 riders.

## Characteristics of the Housing Market

Recently, a comprehensive study of the regions housing markets discovered ongoing and persistent challenges regarding housing affordability and choice in the North Country. Often similar to NH as a whole recently home sale prices have greatly increased, however new housing production in the north country lags behind other portions of the state for a wide variety of reasons including access to skilled labor, access to financing, construction costs, and municipal regulations.

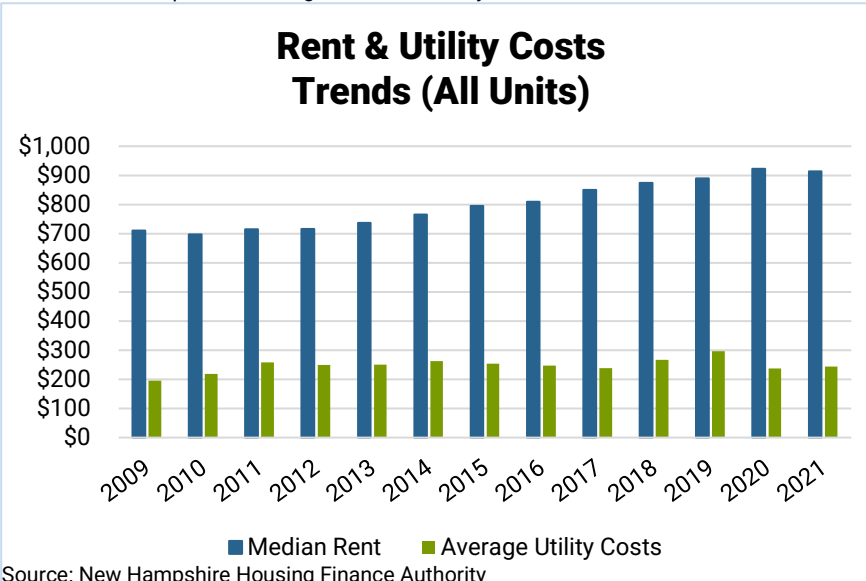
Key Issues and Solutions relevant to the Economic Development Strategy are:

- In recognition of the need for broad buy-in for comprehensive, regional housing solutions, launch an advocacy campaign focused on two principles:
  - “Housing Matters”
  - “Wages Matter, Too”
- Create a Workforce Housing Business Partnership

If you’d like to read more about the housing needs of the region, access the report [here](#).



Source: New Hampshire Housing Finance Authority



Source: New Hampshire Housing Finance Authority

Another challenge the region faced was the demand and cost of housing increases that arose from the pandemic. The North Country is geographically located within two hours of several large, urbanized areas and was home to many second homeowners before the pandemic. As people shifted to remote working and learning, many second homeowners chose to stay in the region where transmission rates were lower, and families could enjoy spending time outdoors. As people visited the region, the area’s natural and cultural capital, combined with relatively affordable prices for a second home buyer, made the region attractive for those seeking new investments, putting more demand on the market.

The short-term rental market expanded in the region, and data suggests this expansion may be impacting the availability and price of traditional long-term rentals. With relatively lower wages in the region, many workers rely on long-term rental as affordable housing.

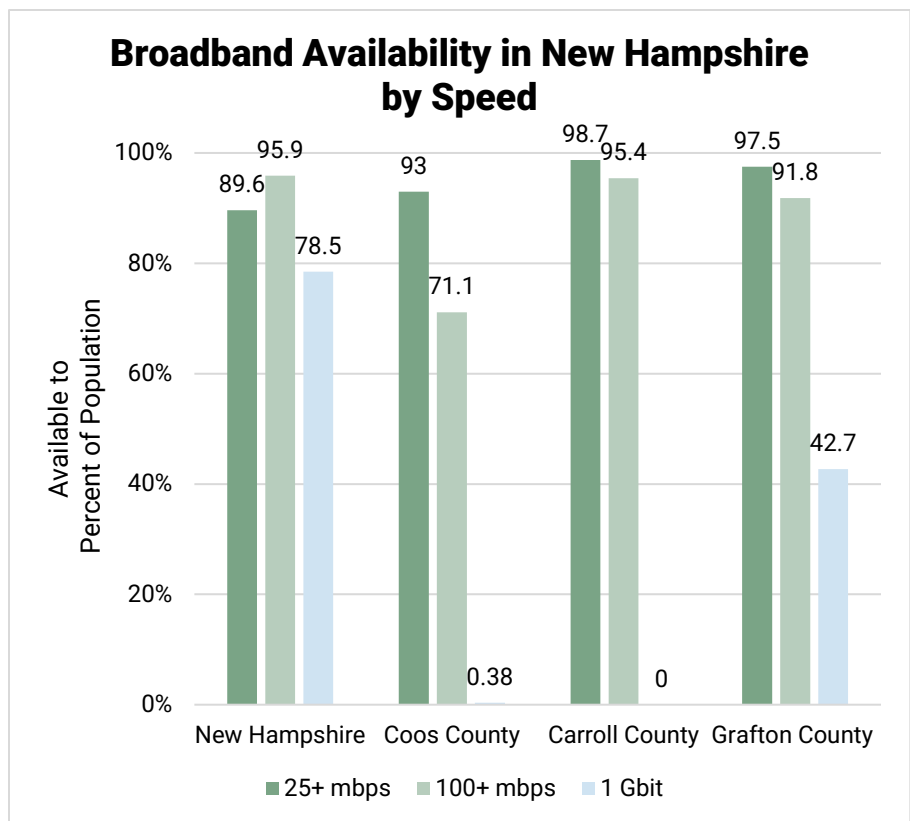
“According to AirDNA, advertisements for short-term rentals in the towns that make up the North Country Economic Development Region have increased 74% since 2017. Three-quarters of these rentals are for an entire home (as opposed to just a room). The economics of short-term rentals also differ from longer-term rentals. AirDNA reports that the median monthly revenue for units in these towns is more than \$2,600, a full \$1,600 more than the median rent for long-term rentals.”

Before the pandemic, home prices were already rising faster than inflation rates, and because of the pandemic, were accelerated. In the North Country, where housing stock is low and home prices were relatively affordable, this created a spike in demand that would put additional pressure on the region’s businesses and workforce.<sup>3</sup>

### Broadband Access

The EDD, like many other rural areas in the country lacks access to fast, reliable broadband services. Though many rural areas may offer broadband service, it’s often low-speed access. Compared to the broadband availability of other regions, North Country region clearly lacks coverage, specifically at higher download speeds. To find current detailed information on broadband availability, explore the Federal Communications Commission maps here: <https://broadbandmap.fcc.gov/#/>

The figure above indicates that there is a severe lack of access to broadband services in the region and suggests that it’s likely negatively impacting the growth of new business and the resiliency of current businesses acting as a barrier to attracting new businesses, industry, entrepreneurs, and residents. Broadband availability continues to be a major barrier to economic development and resiliency. Businesses typically base their broadband needs on how many employees they have connected to the internet server and the type of usage the business would need on a daily basis. Based on the 2015 New Hampshire Broadband Report, the current state of broadband availability in the EDD does not foster an environment for higher-paying businesses, industry, and entrepreneurs to put roots down in the area.



<sup>3</sup> Source: North Country Housing Needs Analysis, 2021 – <https://www.nhhfa.org/wp-content/uploads/2021/07/North-Country-Housing-Needs-Analysis-2021.pdf>



Lack of access to broadband has also had a negative impact on educational attainment within the EED. Specifically, young adults wishing to take online classes and many children who have been taking virtual classes on and off throughout the pandemic. Limited access to fast and reliable broadband has left many children struggling to keep up with their education.



The Carroll County Broadband initiative is working toward ultimately providing affordable, high-speed broadband to every premises in the County. Originally formed as an ad hoc Committee (CCBroadband) of multiple Carroll County towns, a more formal group is carrying the project forward under a newly enacted State Law. The original Committee participated in a multi-state feasibility study (March 2022) that gathered existing conditions data, identified needs, and presented options for building broadband infrastructure throughout the County. Informational meetings were held with numerous telecommunications providers to educate Committee members on the technology and possible options for broadband implementation.

The Committee was instrumental in working with State Legislators to draft new legislation that now permits multi-town bonding for broadband infrastructure by amendments to RSA 31. Further, the Committee assisted with the proposal and ultimate enactment of State Law RSA 53-G. This new Law allows for the formation of Communications Districts whereby two or more municipalities can join together in a governmental entity to fund and provide broadband to its residents and businesses.

Per RSA 53-G, the first step to forming a Communications District is to establish a Communications District Planning Committee. Thus, the Carroll County Communications District Planning Committee (CCCDPC) was born to build upon the foundational work laid by CCBroadband. Members were appointed by their respective Selectboards, grant funds secured, and a consultant hired to draft the requisite District Agreement and Bylaws for the envisioned District. The CCDPC's work can be followed at this web page on the County's website: <https://www.carrollcountynh.net/carroll-county-communications-district-planning-committee>. The formation of the District will be a Ballot question for voters in 2023.

Fiber broadband infrastructure buildout has begun in some of the more populated areas of the County as telecommunications providers respond to the region's needs by making broadband capital investments. The Carroll County Communications District is intended to be the vehicle for getting broadband to the more rural areas of the County.

## ***Economic Development Programs***

There are a wide variety of economic development tools and programs that can be put in place within pockets of a region to promote private investment, ease up-front development burdens and create meaningful public and private partnerships. Four such core tools include: Federal Opportunity Zones; Economic Development HUB Zones; Community Revitalization Tax Incentives; and Tax Increment Financing (TIF) Districts.

<b>Federal Opportunity Zones (federal tax program)</b>
· Located in: Berlin, Colebrook, Conway, Groveton, Lancaster, Lincoln, Littleton & Plymouth
<b>Economic Development HUB Zones (federal contract program)</b>
· Located in: All of Coos & Grafton Counties* (*Grafton County ending in June of '23)
<b>Community Revitalization Tax Incentives (state-enabled tax program)</b>
· Berlin, Bristol, Canaan, Enfield, Lancaster, Lisbon, Lebanon, Northumberland, Waterville Valley
<b>Tax Increment Financing (TIF) Districts (local tax deferral program)</b>
· Berlin, Enfield, Hanover, Lebanon, Lincoln

## ***Outdoor Recreation Infrastructure***

The region's network of outdoor recreation infrastructure is essential to the success of this growing economic sector within the North Country. The region's trails, trailheads, parking lots, restrooms, visitor centers, water access points, and physical infrastructure components are essential to the continued growth and sustainability of this type of economic activity. Equally important are the workforce skills and career opportunities available for the outdoor recreation workforce. Expanding our data on these resources to understand the number, capacity, and location of this infrastructure, such as the miles of trails available for different users (ski, bike, hike, OHRV, equestrian, paddler, etc.) or projects underway that tie with regional or statewide priorities, and sample project illustrating local initiatives could aid communities in the region in pursuing new, wider-reaching projects, to grow the sector.

## INDUSTRIAL AND COMMERCIAL USES

Historically, the economy of NH's North County has seen the rise, fall and rebirth of different industries over time. Between NH's 3 northernmost counties, we see industries focused on the land, people, infrastructure and institutions in Carroll, Coos and Grafton Counties. Forest based wood industries, and manufacturing of wood products (such as paper, furniture and lumber) and textiles were core industries in the historic economic development of the region. While employment and profit generation have waned over time, these core industries remain a critical component of the region's economic heritage and activity. Manufacturing operations have evolved with polymer product, iron and paper manufacturing in Northern Coos County, the growth of biomedical and technology-based manufacturing in southern Grafton County, and the continuation of various industrial activities in the area's established industrial parks like the one found in Littleton. This section will analyze employment by industry, explore the space needs for our core industries, and discuss the benefits and challenges of investing time, people and money to expand them.

### *Industry Changes*

Figures 1, 2 and 3 look at employment by industry between 2000 and 2020 for Carroll, Coos and Grafton Counties. From these figures we can observe recent increases and decreases in each industry, explore what factors may contribute to these changes, and understand what economic development activities best align with recent conditions and needs. Each county will be explored in detail, but first we'll look at the trends across all three figures, specifically focusing on manufacturing.

According to the U.S. Department of Labor, the businesses defined as manufacturing include: "establishments engaged in the mechanical or chemical transformation of materials or substances into new products. These establishments are usually described as plants, factories, or mills and characteristically use power driven machines and materials handling equipment. Establishments engaged in assembling component parts of manufactured products are also considered manufacturing if the new product is neither a structure nor other fixed improvement. Also included is the blending of materials, such as lubricating oils, plastics resins, or liquors." In 2020, 9% of the labor force was employed in manufacturing across all three counties in the North Country. While this number decreased in the long-term history, it is consistently one of the top 5 employment industries in our region and may need additional support to remain a strong foundation of a diverse North Country economy. Of the top employment sectors, manufacturing pays the 2<sup>nd</sup> highest wages in Carroll County, and the 3<sup>rd</sup> highest in Coos and Grafton Counties, highlighting this sector as an opportunity for good paying, consistent jobs. As of 2020, Grafton County had the highest number of manufacturing jobs at 2,754, Carroll County had 2,645 and Coos County



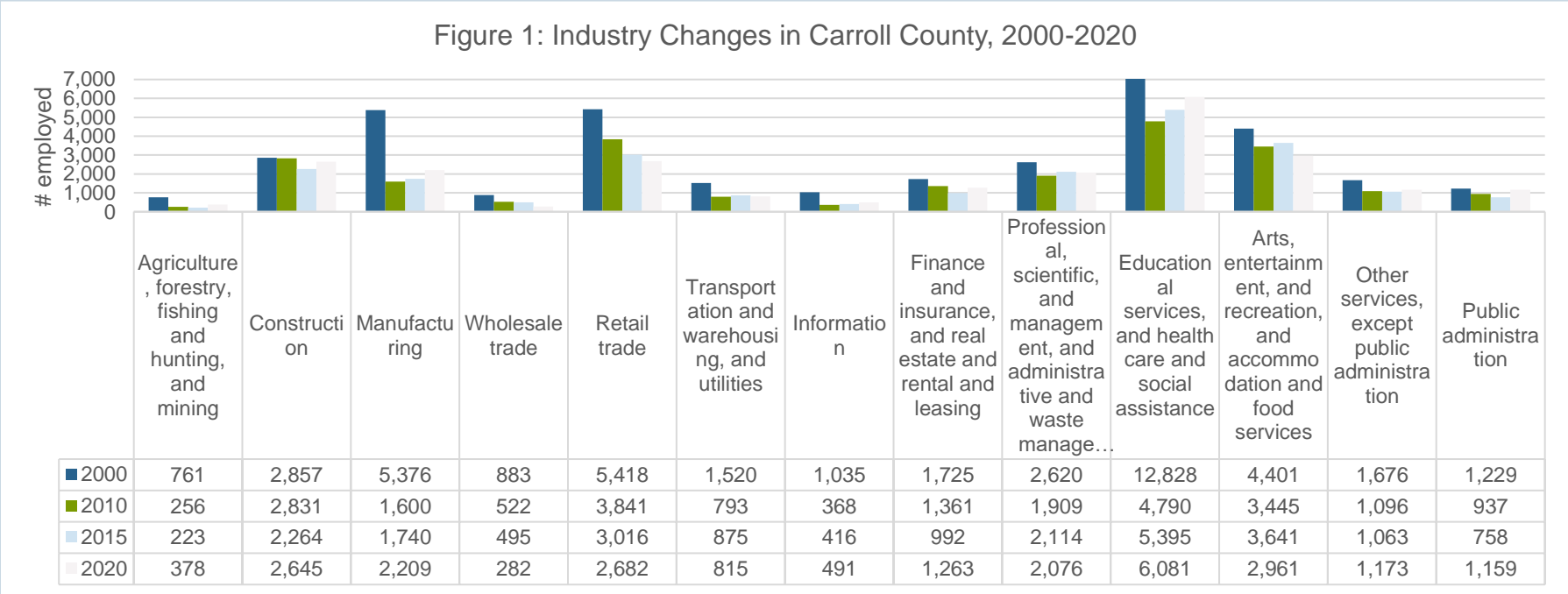
*Burgess BioPower biomass plant in Berlin. Photo Credit: North Country Council*

was at 1,293. The following breaks down the industry trends for each of the three counties in the North Country.

**Industry Changes in Carroll County**

According to Figure 1, the 5 industries with the most employees in Carroll County are: 1) Education, Healthcare & Social Assistance; 2) Arts & Entertainment, Accommodation & Food Services; 3) Retail Trade; 4) Construction; 5) Manufacturing. Education, Health Care & Social Assistance and Manufacturing have trended upward since 2010, while Retail Trade and Arts & Entertainment, Accommodation & Food Services trended downward. Construction decreased in 2015 but then rebounded in 2020. The median earnings for the top employment industries in Carroll County are:

- Education, Healthcare & Social Assistance: \$61,500
- Manufacturing: \$59,560
- Construction: \$44,560
- Retail Trade: \$43,083
- Arts & Entertainment, Accommodation & Food Services: \$35,508

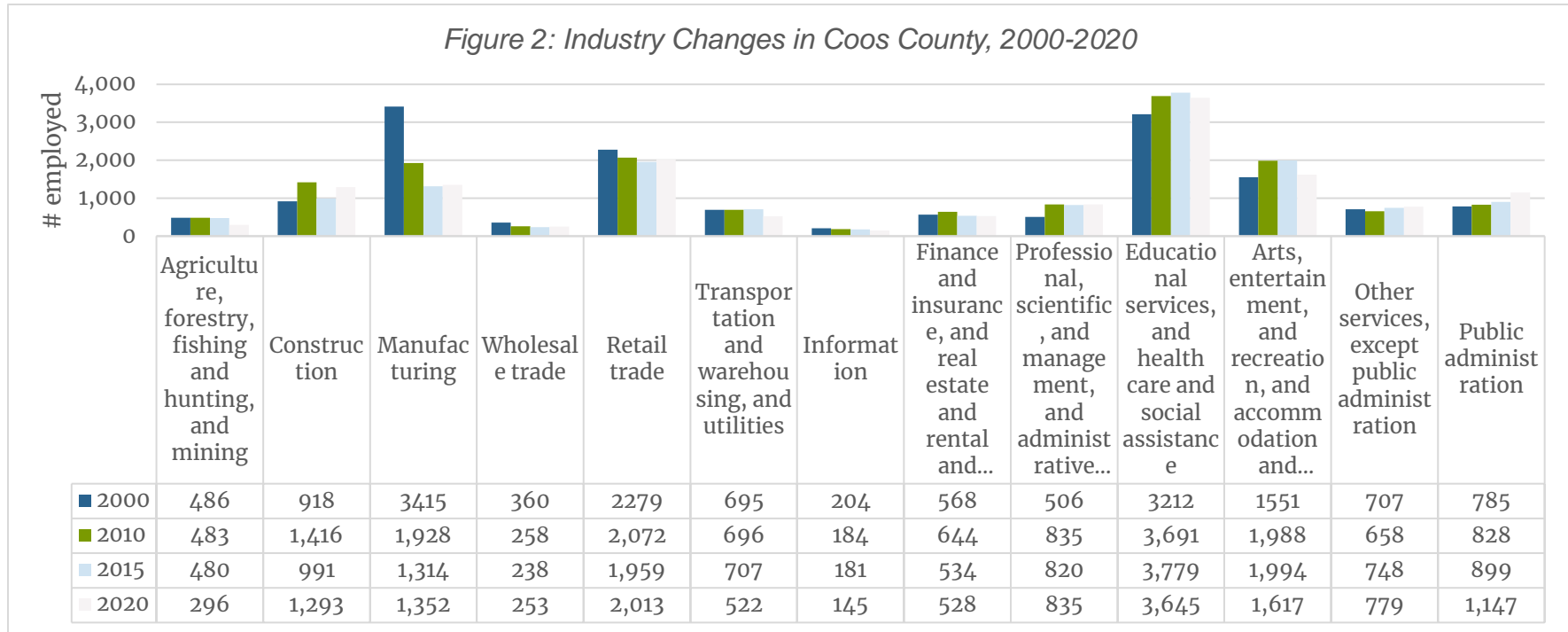


Source: American Community Survey 5-Year Data (2018-2022), DP03 and US Census 2000, DP3

**Industry Changes in Coos County**

The 5 industries with the most employees in Coos County include: 1) Education, Healthcare & Social Assistance; 2) Retail Trade; 3) Arts & Entertainment, Accommodation & Food Services; 4) Manufacturing; 5) Construction. See Figure 2. All of these industries trended downward in employment between 2010 to 2020. The median incomes for the top employment industries are:

- Education, Healthcare & Social Assistance: \$50,218
- Construction: \$46,891
- Manufacturing: \$44,643
- Retail Trade: \$41,167
- Arts & Entertainment, Accommodation & Food Services: \$39,250

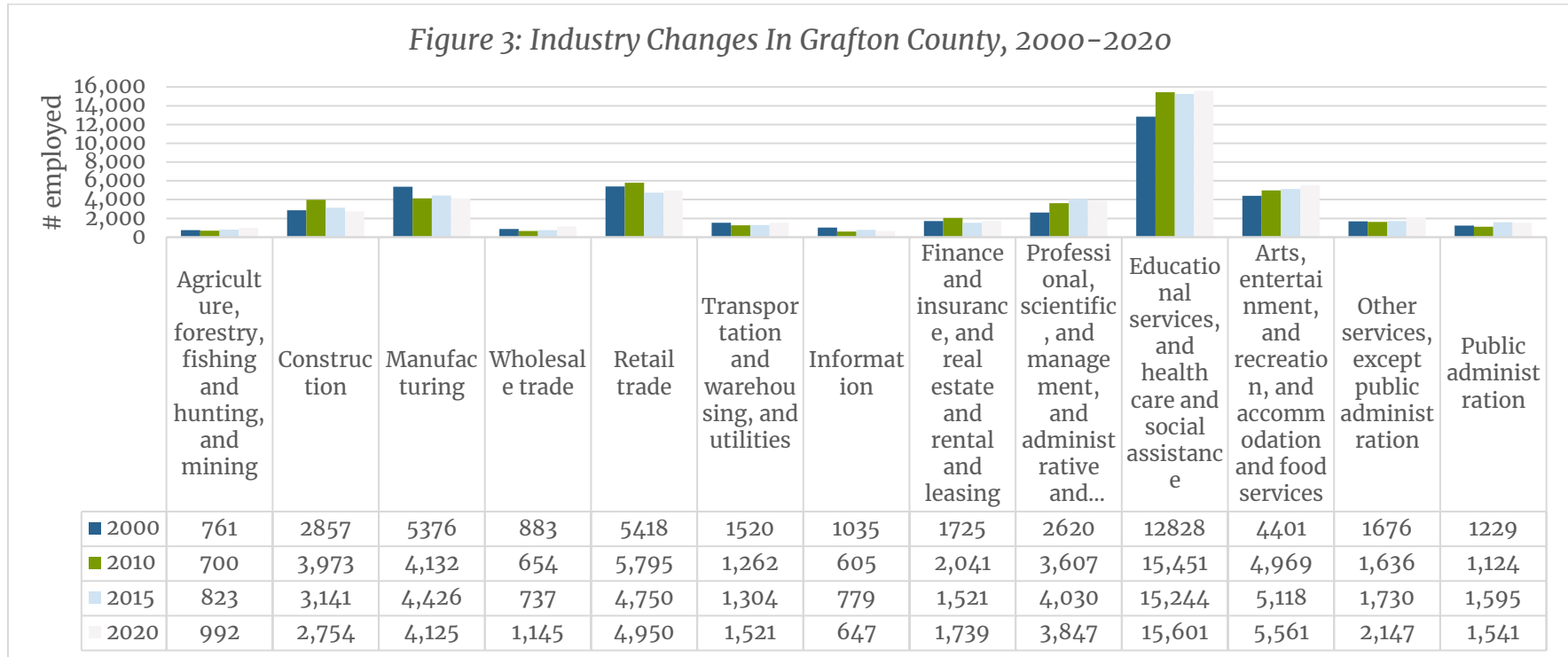


Source: American Community Survey 5-Year Data (2018-2022), DP03 and US Census 2000, DP3

**Industry Changes in Grafton County**

The 5 industries with the most employees in Grafton County in the recent past have been: 1) Education, Healthcare & Social Assistance; 2) Arts & Entertainment, Accommodation & Food Services; 3) Retail Trade; 4) Manufacturing; 5) Professional, Scientific & Management. See Figure 3. Education, Healthcare & Social Assistance; Arts & Entertainment, Accommodation & Food Services; and Professional, Scientific & Management have trended upwards since 2010. Retail Trade and Manufacturing have trended downward since 2010. The median income of top employment industries in 2022 included the following:

- Professional, Scientific & Management: \$69,231
- Education, Healthcare & Social Assistance: \$67,050
- Manufacturing: \$54,421
- Retail Trade: \$37,926
- Arts & Entertainment, Accommodation & Food Services: \$ 31,363



Source: American Community Survey 5-Year Data (2018-2022), DP03 and US Census 2000, DP3

## Space Needs

More recently, redevelopment and reuse of former industrial spaces has been a focal point. Examples like the Groveton Mills site in Northumberland, and demolition and remediation of spaces like the former Frasier Pulp Mill in Berlin show us ways to use our historic spaces for the development of new industries. Today's cleaner, greener industries also help us reuse these spaces for industrial uses again, which is a win-win.

Several economic development projects on the CEDS Priority Project List draw attention to the demand and need for improved and expanded space for industry such as manufacturing and expansion of commercial operations. All of these projects highlight the lack of existing space, including buildings ready for occupancy and even land ready for new construction:

- Littleton Industrial Park is actively pursuing expansion to meet demand.
- Dartmouth Regional Technology Center continues to operate at capacity.
- Whitefield Industrial Park is seeking utility and development assistance to open up available land.
- Mount Washington Valley Technology Park is actively pursuing road construction to access additional development sites.
- City of Berlin is pursuing a project to expand utilities and open up additional business development locations along a main corridor.
- Continued redevelopment of the Groveton Mill Site is being explored.
- Colebrook Industrial Park is actively improving infrastructure to spur development.



*Littleton Industrial Park, 1997. Photo Credit: North Country Council*

## Reinvesting in our Industries

While the North Country has space available, there is a need to connect these spaces to essential infrastructure and resources: roads, rail, and airports, poles and easements to hold broadband technology, and core education programs to train and sustain the workforce. The smaller populations and slower economic growth as compared to other regions of NH have resulted in limited highway connectivity; underutilized railways and airports; slow broadband build-out; delayed preparation of existing sites and reclamation and development of new modern industry spaces; and fewer educational programs with adequate resources and offerings. These are many of the areas where reinvestment is needed.

It is important to understand the costs and benefits of reinvesting in our region's industries. Weighing these to prioritize our investments helps us use our financial and people resources wisely. Some of the benefits and challenges to reinvestment include:

- **Benefits of Reinvestment**

- Space – Business and industry expansion demands physical space to provide opportunities for new construction and viable reuse of former sites. Easily accessible, connected spaces that include both “green fields” and move-in ready structures reduce physical construction barriers, delays, and burden faced by new, relocating and expanding businesses.
- Technology – Technology advancements are making significant improvements to efficiency, accuracy, and production in nearly all sectors. The role of robotics, innovation and technology in our goods producing industries continues to grow and provide new opportunities for skills advancement.
- Tax & industry diversification – Local and county governments in the region rely heavily on residential property taxes. Increasing the opportunities for business growth and development in the region can add stability to the tax base through diversification and reduce the burden on residential taxpayers.

- **Challenges of Reinvestment**

- Training/employees – it takes time, expertise and funding to create and/or grow new training programs in our schools. And many companies do not have the resources to create or revive programs on their own.
- Cost of infrastructure investment – the cost to transport goods, build and maintain roads, and install and maintain water/waste services continues to rise. Neither private investment nor public funding can accomplish build-out alone, highlighting the need for partnerships.
- Disbursed locations – The relatively low population densities in the region make it challenging to build projects or launch programs that can reach all corners of the region. This highlights the need for focused investment in several nodes as well as virtual and rotating (traveling) educational and skill development programming.
- Lack of housing options – it is getting increasingly more difficult to recruit talent to the North Country due to the cost and availability of quality housing.

In order to retain and grow these industries, the region must work together to invest in the people and systems that support them. We also need to consider what workforce skills, technology improvements, physical space and infrastructure is essential for success. And we must work together to explore what existing constraints may be hindering growth in these industries. Education, Health Care & Social Assistance demands a skilled workforce at all levels, quality and available housing stock, and modern, geographically dispersed facilities. Manufacturing needs available space and land, physical buildings, infrastructure (water, sewer, power and broadband), and a workforce skilled in not only traditional practices but emerging technologies, software, programming, and automation. The North Country CEDS Committee is committed to embracing the opportunities and tackling the challenges to retain and grow these industries and ensure we are working together to fill any gaps and/or to promote them and their successes.



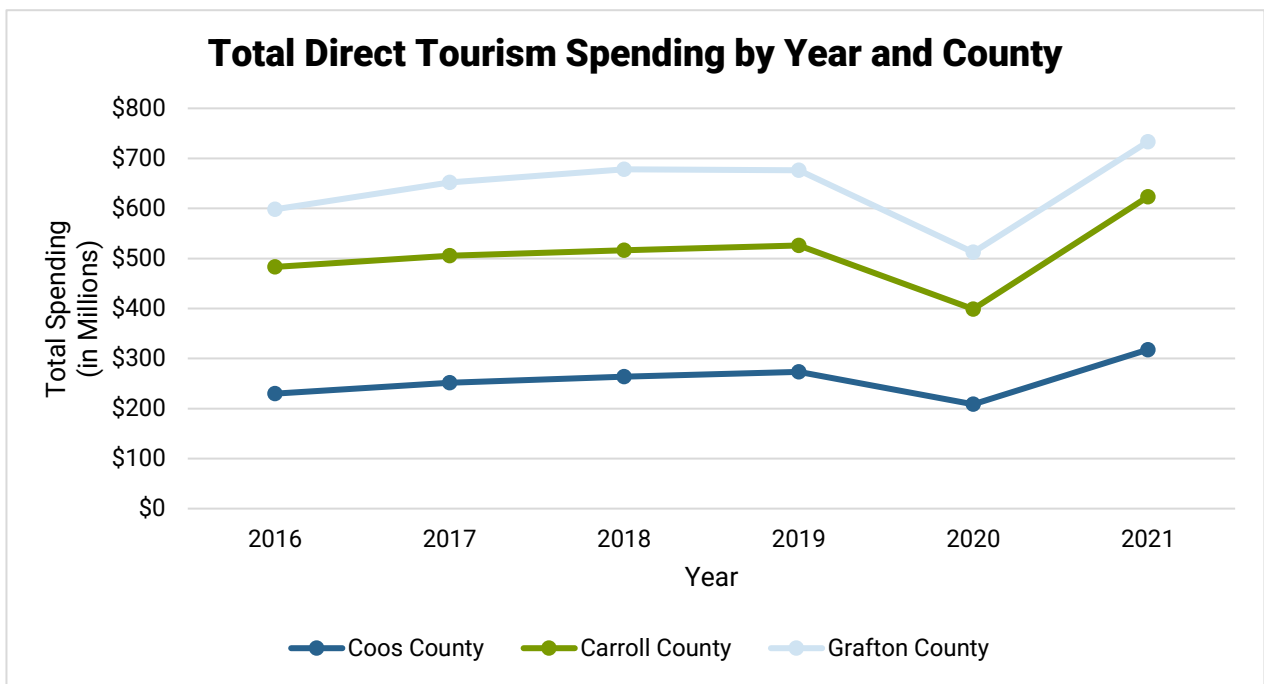
# NATURAL RESOURCES

## Key Natural Resources

Natural resources and the rich environment of the North Country region have historically, and consistently, been the core driver of settlement, industry, and sense of place. Historically, development of the region is tied to industries related to raw materials and the goods they can produce. In more recent times extractive and harvest-oriented businesses have shifted toward more recreational use and increased tourism. The dramatic decline of the wood-products industry and large-scale manufacturing shifted much of the region’s focus towards capitalizing on what already existed in their communities, however forestry continues to be practiced by private landowners through large tracts of EDD land area. Today more than ever, all players—residents and entities— in the region must focus on sustainability of our natural environment and resources. They are limited and subject to great impact. Loss and degradation of these resources will have profound consequences.

## Outdoor Recreation

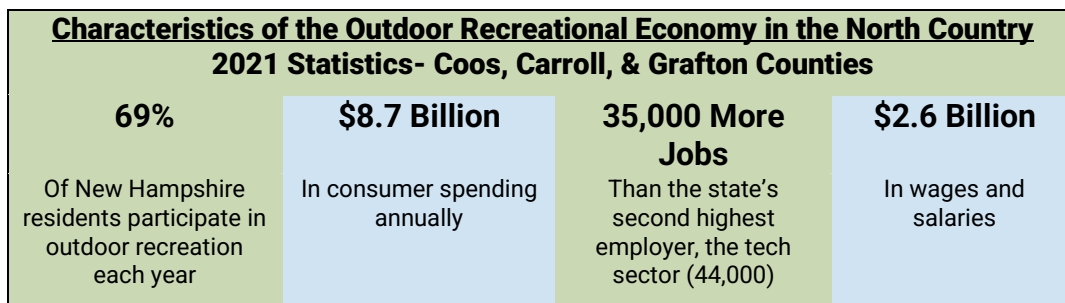
Mountains, rivers, valleys, and more became recognized as profitable natural resources if properly planned to be used for outdoor recreation. The region diversified their industries to not only offer world-class ski areas and hiking but shifted to highlighting as many forms of outdoor recreation as possible. Fishing and hunting have continued to be a major attraction in the region with areas like Pittsburg offering “trophy stretch” for anglers starting below the dam of First Connecticut Lake.



Source: *New Hampshire Travel Impacts*; Coos County, Carroll County, Grafton County; DeanRunyan.com, [TravelStats](#)

Outdoor recreation businesses have built sustainability through improving on and expanding the breadth of their experiences. Activities such as mountain biking and zip-lining have been added to many ski mountains to encourage expanded seasons and resiliency in weather dependent business tourism dollars. Efforts such as those of Granite Backcountry Alliance, *backcountry skiing*; Bike the Borderlands/the Northern Forest Center, *mountain biking*; the Tri-Town Bike Friendly initiative, and local

NEMBA chapters are having positive economic impacts for communities and introducing a new and expanding base of outdoor enthusiasts to our region beyond the traditional hike, winter sports, OHRV, hunting-fishing users. Growth in the outdoor recreation workforce will be necessary and education programs are reaching into this space. High School CTE programs in Littleton, Whitefield, Kennett, and Plymouth are all focused on outdoor rec curriculums and AMC's renovation and reopening of Camp Dodge Trails Training Center including annual Trail Skills College curriculums for professional staff, volunteers, and outdoor enthusiasts are examples of workforce development taking shape with help of recent NBRC and USDA Rural Development funding. ATV and snowmobile use, and access have also increased in the past decade alongside the businesses however, key natural resources such as the presence of iconic fall foliage, mountains, boreal forest, and wildlife such as moose, have become some of the unique attributes driving the region's outdoor recreation. Lastly, agriculture has continued to be a pillar of local food production and recreation.



Source: Outdoor Industry Association: Accessed Nov. 27, 2018

### *Natural Capital During the Covid-19 Pandemic*

While businesses shut down, unemployment and flex schedules increased, and families were spending more time at home, the draw to spend time outdoors, where the virus is less likely to spread, became more and more appealing to people. The region is known for its abundant natural capital and the White Mountain National Forest within the region is located within one day's drive of more than 70 million people. Michael Ferguson, a professor of recreation management and policy at the University of New Hampshire, says the number of visitors in New England's national forests increased by more than 60% throughout the summer of 2020. He has also seen a 400% increase in visitation to congressionally designated wilderness areas throughout the pandemic.<sup>4</sup>

As people began making plans to escape to the region, the White Mountain National Forest, on March 26, 2020, shut down several recreation sites and toilet facilities for the health and safety of visitors and staff. On April 24, 2020, the White Mountain National Forest shut down several high use trailheads, day-use areas, and dispersed recreation facilities in alignment with federal, state, and local guidance for physical distancing and to ensure health and safety of employees, visitors, and volunteers. An announcement on that date stated "while the White Mountain National Forest remains open, we are reminding the public to please recreate responsibly. New Hampshire has a Stay Safe at Home order in place and has asked the public to recreate locally."<sup>5</sup>

By May 2020, the Appalachian Mountain Club closed overnight use based on their abilities to maintain health and safety during the pandemic for overnight guests. During this time the AMC maintained

<sup>4</sup> Source: National Forest Foundation NFF, 2020; United States Department of Agriculture Forest Service USDA FS, 2020

<sup>5</sup> Source: <https://www.fs.usda.gov/detail/whitemountain/news-events/?cid=FSEPRD729207>

critical stewardship services (water, restrooms, information) to the historic volume of visitors to the region and AMC's popular, priority landscapes. NH's public-private partnerships were critical to providing outdoor recreation services and experiences. The AMC was able to maintain a base level of services allowing residents and the visiting public to seek health and wellness through their public lands while sustaining some level of economic growth through outdoor recreation and tourism for the state of NH.

As recreational facilities had to close during this time, and the outdoor recreation workforce was already working at capacity, there was a significant increase in visitors during the 2020 summer and fall tourism season. The dedicated workforce and volunteers were essential in addressing challenges with overcrowding in parking lots and trailheads, substantial litter and waste at recreational sites, trailheads, and on trails, increased need for trail maintenance and emergency response, and significant impact to the natural environment.

### ***Food and Agriculture***

Another important aspect of the district's natural resources are the land and practices that support food and agriculture. From rolling farmlands along the Connecticut River to timer farming in Coos County, agricultural land is a valuable asset to the region and is under threat of development. Conservation Trusts are working with landowners to ensure agricultural practices can continue on conserved land and many communities have created community gardens and school gardens increasing the amount of land and space dedicated to food production and natural resources. Utilizing the communities' public natural spaces, the District's farmers' markets are essential for providing direct to consumer opportunities for farmers and community engagement and socialization. These same public natural spaces are often used for outdoor performances, concerts, and seasonal events.

### ***Land Use***

Significant portions of Coos, Carroll and Grafton County are put under current use taxation, or RSA 79-a. The tax incentive essentially encourages landowners to preserve the natural resources and/or open space of their land in return for a property tax reduction.

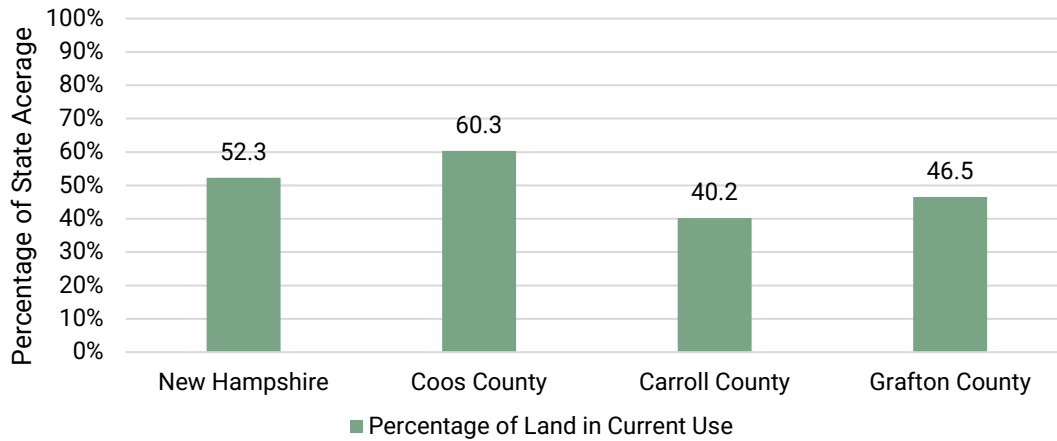
**RSA 79-A and the Recreation Adjustment:** "Under this program, parcels of land (10 acre minimum) are taxed based on their current use value as open space rather than on their potential value for development purposes. Recreation adjustment lowers a landowners' tax burden by an additional 20 percent if the land is kept open to the public for traditional forms of recreation. The six traditional forms of recreation are skiing, snowshoeing, fishing, hunting, hiking, and nature observation. Access must be available year-round unless these activities are detrimental to crops on agricultural lands or active forestry operations."

**RSA 212:34 Duty of Care:** in summary states the landowners are not responsible for the maintenance of their premises in order for them to be used for recreation.

**RSA 508:14 Landowner Liability Limited:** in summary protects landowners from liability of personal injury or property damages.

Below is data on current use enrollment in 2020 from New Hampshire Department of Revenue Administration.

## Percent of Acreage out of the Total Acres in the State by Use in 2020



Source: 2020 Current Use Report, NH Department of Revenue Administration, [20-current-use-report.pdf \(nh.gov\)](https://www.nh.gov/Portals/0/20-current-use-report.pdf)

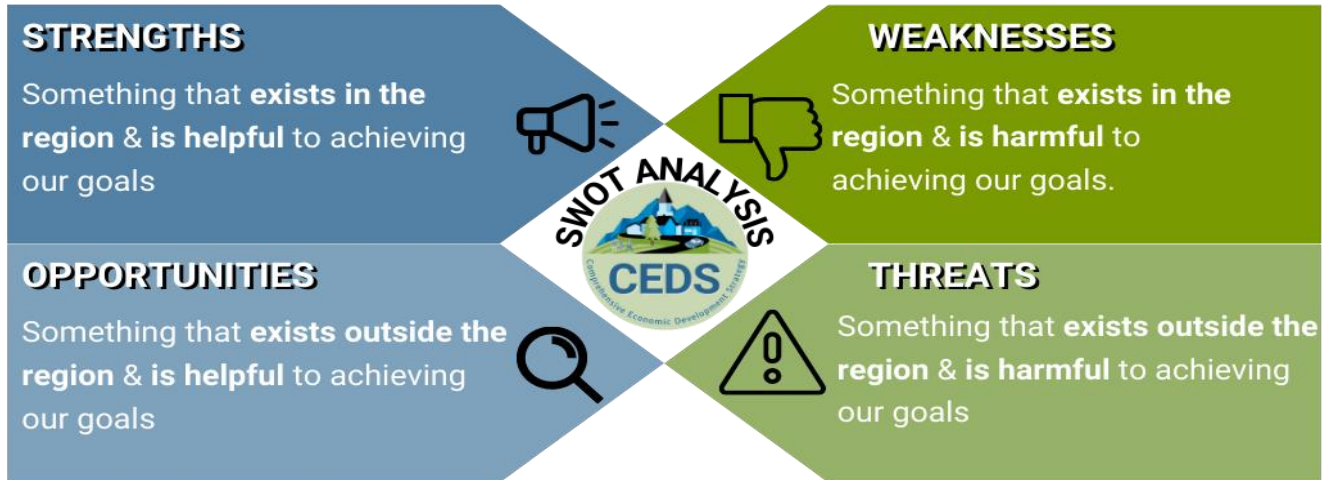
In NH as a whole, Coos County and Grafton County there has been no change in the share of land enrolled. In Carroll County the percentage of land enrolled has increased from 38.3% in 2015 to 40.2% in 2020 where 11,000 acres have been added. This represents land that is used for forestry, farming or recreation.

County	Total Land Acres	Acres in Current Use	Percent of Land in Current Use
<b>Statewide</b>	5,742,659	3,006,013	52.3%
<b>Belknap</b>	257,725	143,530	55.7%
<b>Carroll</b>	598,386	240,530	40.2%
<b>Cheshire</b>	452,910	300,459	66.3%
<b>Coos Coos</b>	1,152,946	694,876	60.3%
<b>Grafton</b>	1,096,322	510,328	46.5%
<b>Hillsborough</b>	561,351	262,740	46.8%
<b>Merrimack</b>	597,481	343,323	57.5%
<b>Rockingham</b>	446,221	148,846	33.4%
<b>Strafford</b>	235,092	119,673	50.9%
<b>Sullivan</b>	344,219	241,706	70.2%

Source: 2020 Current Use Report, NH Department of Revenue Administration, [20-current-use-report.pdf \(nh.gov\)](https://www.nh.gov/Portals/0/20-current-use-report.pdf)

Land conservation efforts in the region are expanding through the efforts of SPNHF, Upper Saco Valley Land Trust, and Ammonoosuc Conservation Trust. These efforts are part of the region’s balance between growth and development and long-term land protection, biodiversity, and climate resiliency. Climate change and resiliency efforts and research are also underway in the region. Efforts such as the AMC’s research in resiliency of mountain ecosystems and North Country Council has launched a regional climate collaborative to chart long-term planning.

# SWOT ANALYSIS



## WHAT IS A SWOT?

A SWOT analysis is a strategic planning tool used by many organizations to help determine their best path to success and to defend against setbacks or impacts. This SWOT effort, being part of a future looking CEDS, paid extra attention to future OPPORTUNITIES and gaining awareness of future THREATS.

The strategy presumes that the entity is in a competitive situation with others seeking the same ends. It lists ways that the entity can “win” that competition. **The CEDS is the region’s strategy to preserve and develop core economic, cultural, environmental, and human attributes, which define an authentic reflection of the region’s values and aspirations.** For the region, that competition is real and developing a SWOT based strategy will guide the region out of conflict. The EDD’s challenges are no longer unique, such as paper industry contractions and high unemployment. Currently, the SWOT factors reflect those being experienced by the populated areas of the state, and beyond. These factors, both as OPPORTUNITIES and THREATS, are identified based upon the market research and are described herein.

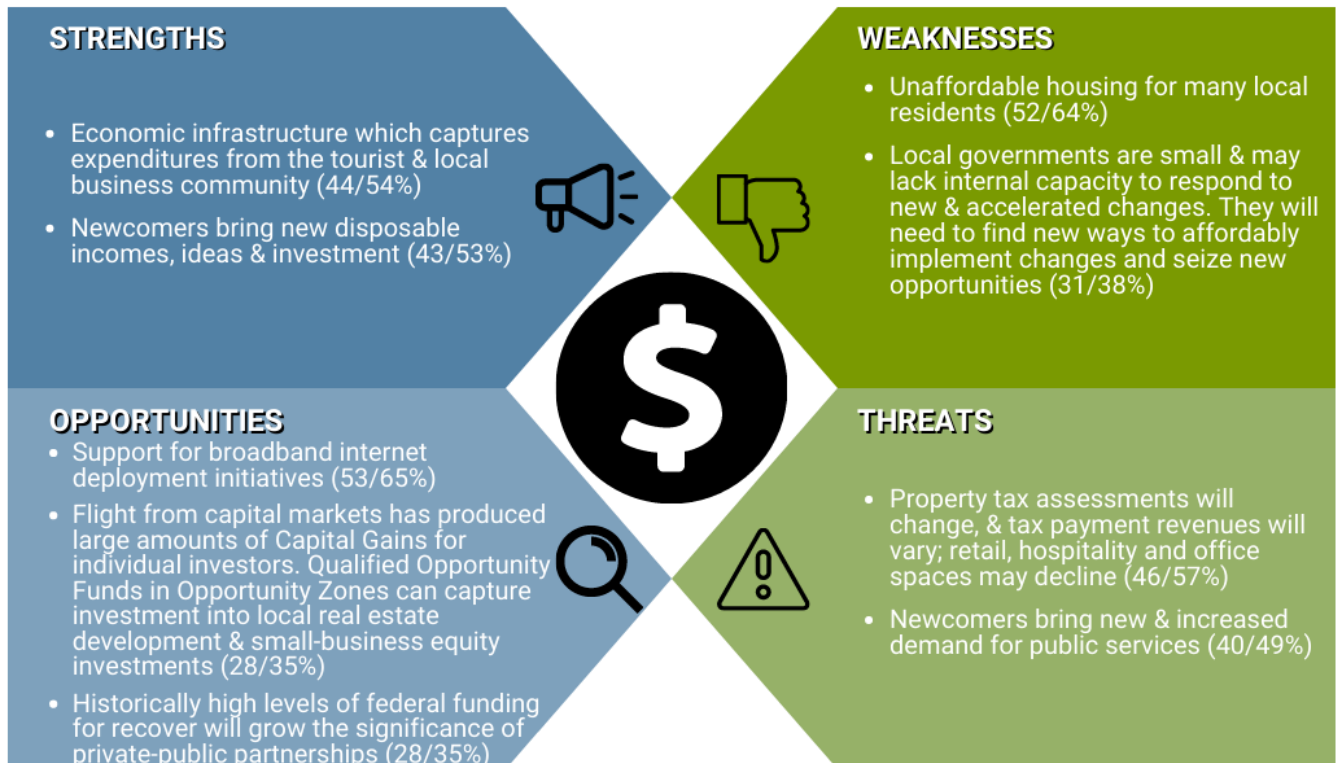
# COMMUNITY SURVEY RESULTS

The responses of the community survey results have been sorted using the ADG approach of Money, Market, People, Place and Land Use.

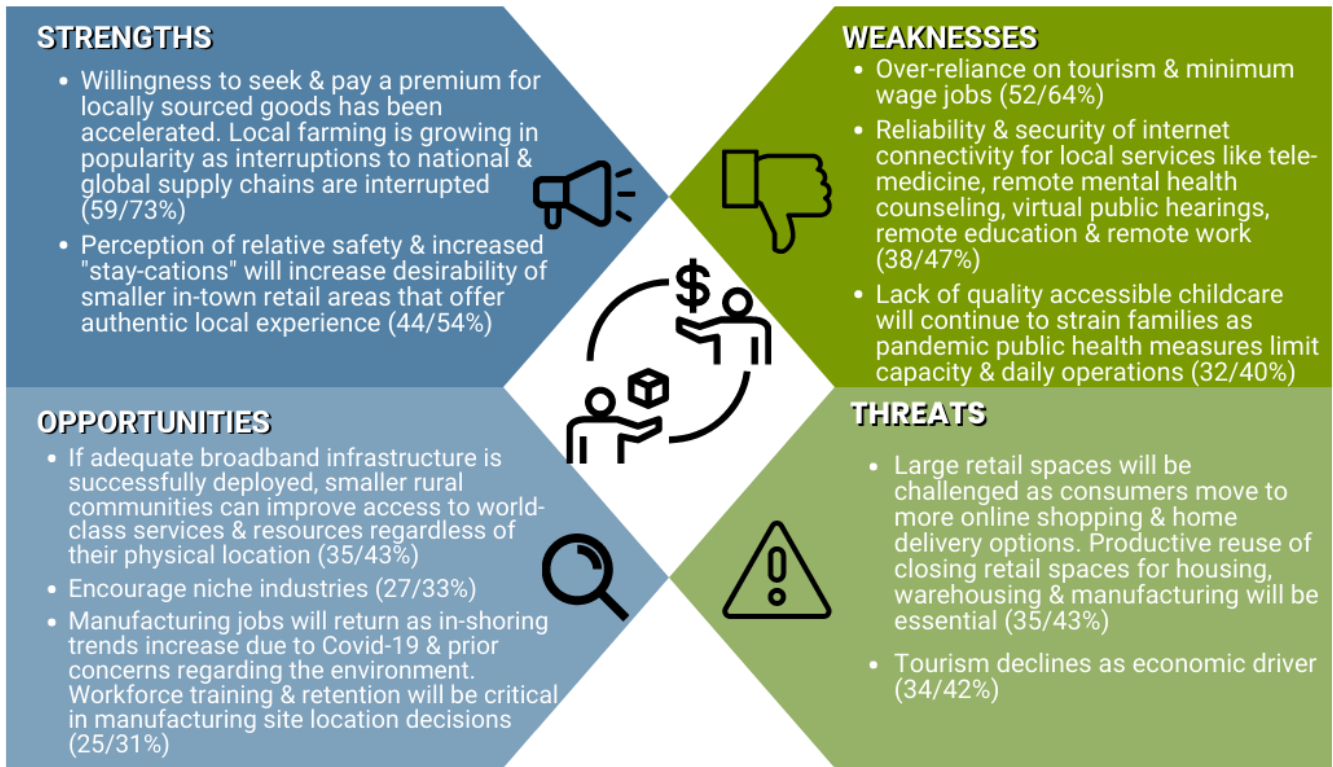
Tables of survey results can be found in the Appendix.



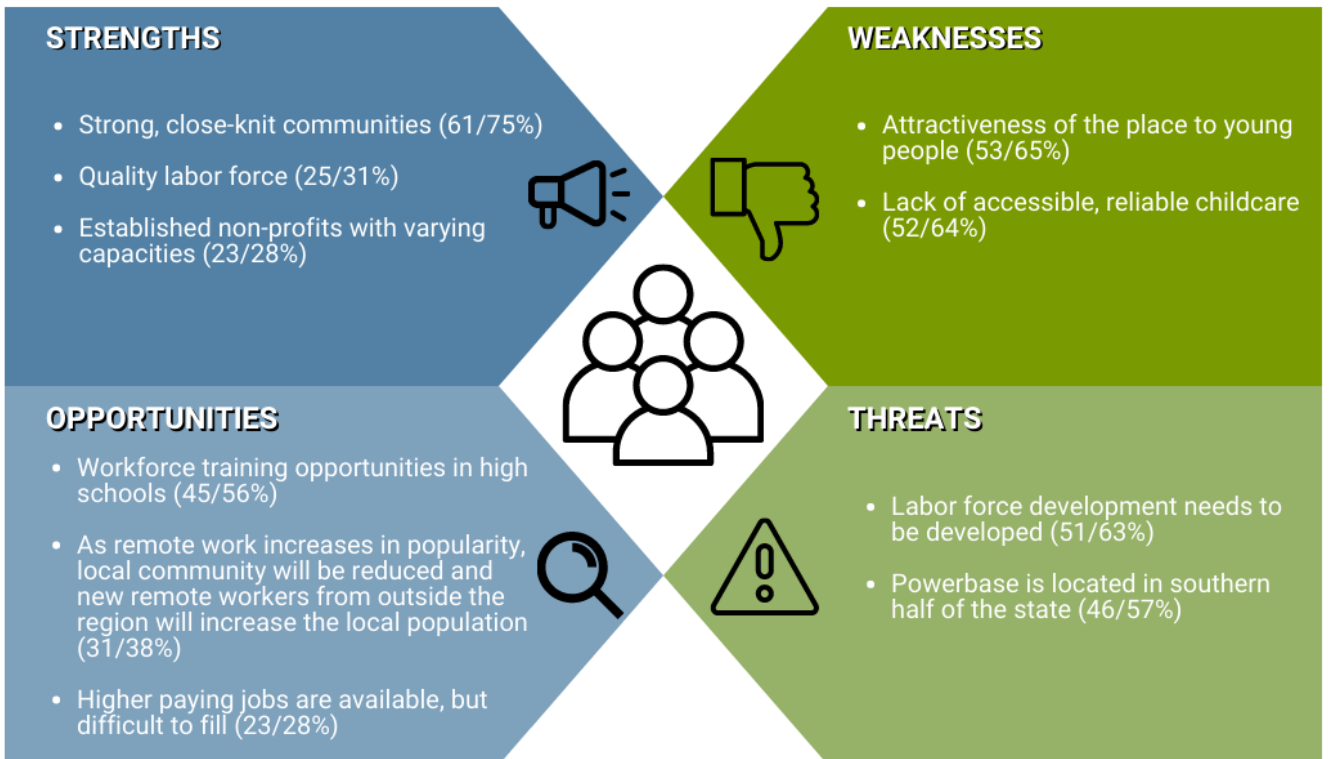
## Money



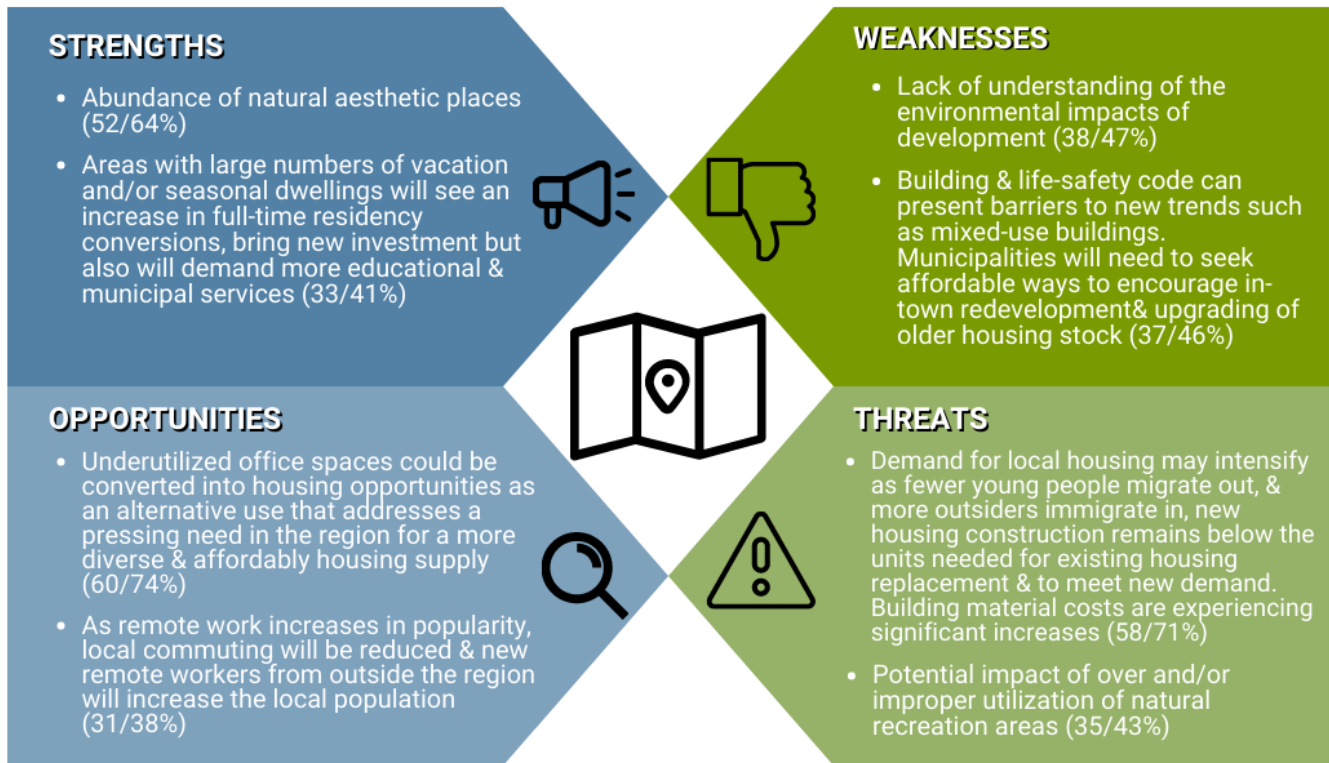
## Markets



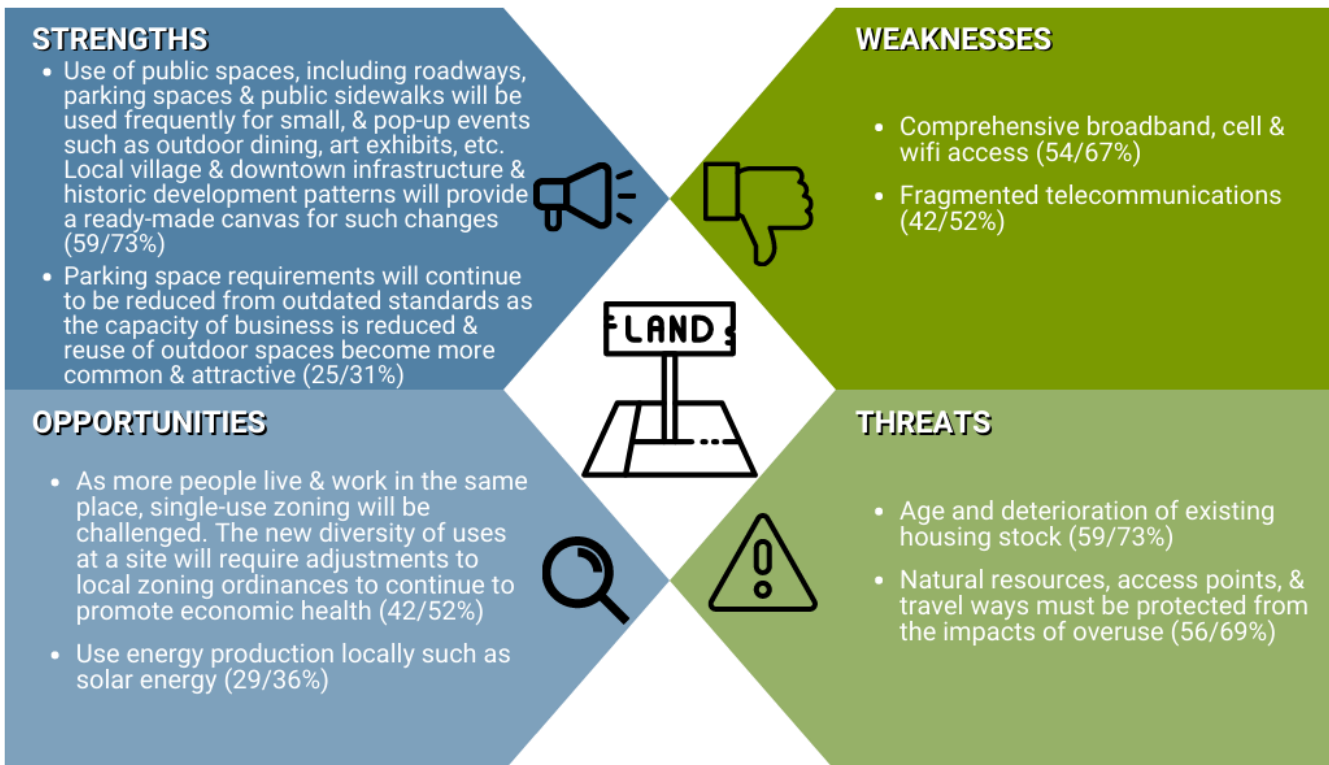
## People



## Place



## Land Use





## **NOTE REGARDING THE STRATEGIC ACTION PLAN**





The Strategic Direction and Action Plan establishes goals, strategies and action items to improve economic conditions in the region. However, this plan does not include a roster of specific projects with steps, stakeholders, costs funding and timeframes for completion, intentionally. The intention of this Strategic Action Plan is to identify the broader areas for action that allow communities, organizations, and stakeholders to move forward toward the shared vision of our CEDS. In this approach we strive to remain open to new ideas, and nimble in this time of rapidly changing economic and political conditions. The action items below describe Actions which can be completed or launched by North Country Council staff, and entities participating in our CEDS process today.

## **NOTE REGARDING A CEDS PROJECT LIST**







The North Country CEDS Committee maintains a list of known programs and projects as a separate document adjusted and updated as conditions and status changes occur for projects seeking EDA funding. CEDS Committee members meet to review and discuss these projects with potential EDA applicants at CEDS meetings to evaluate how they align with the documented conditions, needs and direction presented in the Action Plan and the CEDS as a whole. Entities with projects can access the North Country CEDS Project Profile Form online by following this link:




<https://survey123.arcgis.com/share/1624a4098762467ba914689fee731ccc>





# STRATEGIC ACTION PLAN


CEDS Goal	CEDS Strategies	Types of Community Capital	Cross-Cutting Theme	Action Items
<p>1. To support ongoing efforts to collaborate, share resources, build new partnerships, and strengthen existing ones within economic development that balances community capitals and regional needs.</p>	<p>To maintain an active and supportive CEDS committee who provide connection and guidance for economic development while building relationships and trust with each other</p>		<p>Collaboration &amp; Collective Impact</p>	<p>Create a new CEDS committee member welcome packet outlining the committee's responsibilities, meeting structure, and overview of the CEDS</p> <p>Develop a meeting structure that consists of formal &amp; informal networking, collaboration, and strategic work sessions.</p>
	<p>While valuing the assets that make the region unique, provide guidance, resources, and connections for existing and new economic development projects to support their success</p>		<p>Collaboration &amp; Collective Impact</p>	<p>Develop guidance documents for new project applications on topics of importance in supporting the CEDS and regional needs (i.e., sustainable development guidelines, investing and supporting infrastructure such as housing and childcare, developing products and services for the local and regional supply chain, etc.)</p>
	<p>Ensure balanced investment and support across all community capitals and measure progress over time towards balancing community capitals and economic development</p>		<p>Planning &amp; Assessment</p>	<p>Develop community capital metrics to guide new project development and provide evaluation for ongoing CEDS updates</p>
	<p>Develop a central hub for sharing resources and information within the regional economy</p>		<p>Planning &amp; Assessment</p>	<p>Provide relevant educational and networking opportunities which foster connectivity and cooperation of state and local leaders; businesses, industry, charitable, and others</p>




Maintain up to date investment tracker to showcase past and current successful projects


CEDS Goal	CEDS Strategies	Types of Community Capital	Cross-Cutting Theme	Action Items
<p>2. To sustain a culture of honoring and protecting the people, heritage, and landscape of the region.</p>	<p>Improve the human systems that strengthen our regional economy by promoting creative housing options that are safe, diverse and desirable, high-quality affordably childcare, and access to food and healthcare systems</p>	 	<p>Investing &amp; Supporting Community Backbone Systems</p>	<p>Invite regional childcare organizations, housing leadership/developments, the newly forming North Country Food Council and healthcare organizations to provide regular updates to the CEDS committee on action underway, barriers and challenges, and support needed</p>
	<p>Explore opportunities to increase wage rates and reduce market leakages within industry sectors with traditionally low wage-rates including tourism, hospitality, outdoor recreation, childcare, education, agriculture, healthcare, and the service industry</p>	 	<p>Balanced Economies</p>	<p>Identify businesses currently leading this effort and share their stories as well as models from around the country</p>
	<p>To support the expansion and retention of area traditional industries when possible and help transition to new industries as needed</p>	 	<p>Innovation, Education &amp; Workforce Development</p>	<p>Identify declining industry trends by identifying alternative opportunities to match the skills of employees to new industries</p>

CEDS Goal	CEDS Strategies	Types of Community Capital	Cross-Cutting Theme	Action Items
<p>3. To protect the natural capital of the region while investing in and supporting climate mitigation, adaptation, and regeneration planning and projects</p>	<p>Foster existing business retention, expansion, and transition to new markets as well as the start-up of new businesses, industries, and innovation centers that support climate mitigation, adaptation, and regeneration</p>	 	<p>Climate, Culture &amp; Quality of Life</p>	<p>Support site-readiness improvements (such as three phase power, suitable access, water and wastewater, broadband and communications infrastructure, and move-in ready locations) based on business needs and established locations (such as industrial parks, downtowns/village centers, and locally designated growth zones)</p> <hr/> <p>Identify important industries needed to build a green economy for the region and actively seek new and existing markets to participate (i.e., electric vehicle &amp; solar panel development, regenerative local agriculture, sustainable building and trades)</p>
	<p>Ensure future development does not detract from the natural capital &amp; systems which are the core to sustainability &amp; success of all</p>		<p>Climate, Culture &amp; Quality of Life</p>	<p>Encourage development activities to identify opportunities to reduce and mitigate environmental impact through practices such as low-impact development designs, reduced and context appropriate lighting, and use of renewable energy resources</p>




CEDS Goal	CEDS Strategies	Types of Community Capital	Cross-Cutting Theme	Action Items
<p>4. To provide support for business development, and innovation that supports workforce training, opportunity, livable wage, and work-life balance</p>	<p>Aid municipalities, business, and organizations in accessing or expanding resilient infrastructure including, broadband, diverse transportation options, and water and wastewater systems</p>		<p>Equity, Connectivity &amp; Access</p> <p>Planning &amp; Assessment</p>	<p>Provide technical support to business owners who are reinventing themselves and/or creating business sustainability and resiliency plans</p>
	<p>Support and assist the region with efforts to attract new residents, retain the existing population, and retrain the local workforce with the skills necessary to grow local industry, encourage entrepreneurship and innovation</p>		<p>Balanced Economies</p>	<p>Create opportunities for creating think tanks within existing businesses, industries, educational institutes, youth programs, and new industries interested in locating in the region to innovate and create</p>
	<p>Maintain and build new partnerships with resource organizations at the regional, state, and federal level who can provide business technical support and ensure regional businesses are aware of these resources</p>		<p>Innovation, Education &amp; Workforce Development</p>	<p>Ongoing sharing of resources, programs, training, support and funding opportunities at CEDS meetings and through the NCC EDD public communication channels</p>
	<p>Remove barriers to the use of vacant office buildings and commercial property that can be converted into new business space, coworking/makerspace, and innovation centers</p>		<p>Innovation, Education &amp; Workforce Development</p> <p>Balanced Economies</p>	<p>Explore spaces, infrastructure, and attributes that can be repurposed in the region for new or expanding business &amp; industry and assess the impact of code on redevelopment and reuse of vacant spaces. Advocate for removal of barriers while still ensuring building safety.</p>

CEDS Goal	CEDS Strategies	Types of Community Capital	Cross-Cutting Theme	Action Items
<p>5. To supplement what is missing in the skills, training, and education system that directly connects to industry needs in the region</p>	<p>Support school programming, workforce development, and innovation that provides opportunities for youth and young adults to stay, live, work, and play in the region and take a more active role in their economic future</p>		<p>Innovation, Education &amp; Workforce Development</p>	<p>Create programs where students and youth innovate and develop new industries to meet the needs of the region</p> <hr/> <p>Create programming between schools and existing businesses for creative on-site, experiential learning, and innovative internship and mentorship opportunities</p> <hr/> <p>Actively connect missing education and training that is needed to support and sustain the region's basic needs (i.e., building/trades, food production, healthcare)</p>

CEDS Goal	CEDS Strategies	Types of Community Capital	Cross-Cutting Theme	Action Items
<p>6. To understand income and equity disparities in the region, create plans for an inclusive environment with access for everyone, and measure progress over time</p>	<p>Expand access to education and training programs in distressed markets or areas where industry and major employers are changing</p>		<p>Equity, Connectivity &amp; Access</p>	<p>Identify distressed market areas and potential education and workforce training partners and opportunities to bring to those areas</p>
	<p>Ensure equitable access to basic needs to sustain life are available across the region including access to housing, food, transportation, heat, health and community services</p>		<p>Equity, Connectivity &amp; Access</p>	<p>Work with partner organizations to identify and inventory assets and gaps across the region</p>
	<p>Reduce barriers and provide support to traditionally marginalized populations to have equitable access to economic development opportunities in the region</p>		<p>Equity, Connectivity &amp; Access</p>	<p>Work with the new <a href="#">NH Center for Equity and Justice</a> to identify actions to support this strategy</p>

CEDS Goal	CEDS Strategies	Types of Community Capital	Cross-Cutting Theme	Action Items
<p>7. Study and learn from innovative models around the country and pilot them in the region</p>	<p>Attract innovation to the region by researching models that work in other areas and adapting those models to our regional &amp; industry needs</p>		<p>Innovation, Education &amp; Workforce Development</p>	<p>Reach out to neighboring states and regions on ways they have creatively tackled common challenges and methods used to capitalize on opportunities</p> <hr/> <p>Review and consider adopting practices from <a href="#">the NCR case studies</a> that support innovation in existing industries in areas where they have expressed an interest in learning from others such as marketing, education, and training</p>



CEDS Goal	CEDS Strategies	Types of Community Capital	Cross-Cutting Theme	Action Items
<p>8. Retain and attract manufacturing and other skilled trades that provide good jobs, with year-round employment, livable wages, and advancement opportunities for this generation and beyond</p>	<p>Retain our next generation workforce and engage them in the potential for employment and advancement in these fields</p>		<p>Innovation, Education &amp; Workforce Development</p>	<p>Explore apprenticeships and high school programs that can engage youth in manufacturing and the trades before they graduate.</p>
	<p>Increase the technology knowledge base of our current and future workforce to continue innovation, progress and competition in the manufacturing sector.</p>		<p>Innovation, Education &amp; Workforce Development</p>	<p>Partner with White Mountains Community College, White Mountain Science Inc., NH FIRST and other organizations that can build technological skills in our youth and current workforce.</p>
	<p>Encourage the monitoring of potentially available industrial properties suitable for manufacturing purposes.</p>		<p>Planning &amp; Assessment</p>	<p>Work with NH BEA, the Economic Development Councils and local governments to track available properties to convert to or expand as industrial properties for manufacturing uses.</p>

# APPENDIX

## SWOT ANALYSIS SURVEY RESPONSE TABLES

### Money

Count	Percentage	Answer
<b>QUESTION: What are the NC's greatest strengths when it comes to money?</b>		
44	54.32	Newcomers bring new disposable income, ideas, and investments
43	53.09	Economic infrastructure which captures expenditures from the tourist and local business community
1	Other Response	An underserved market of aging long-term residents who will require more services as they grow older.
<b>QUESTION: What are the NC's greatest weaknesses when it comes to money?</b>		
52	64.2	Unaffordable housing for many local residents
31	38.27	Local governments are small and may lack internal capacity to respond to new and accelerated changes. They will need to find new ways to affordably implement changes and seize new opportunities.
23	28.40	Tax structure, dependence on property taxes to fund schools.
2	Other Response	Unreliable broadband internet in the region
2	Other Response	Development of tourist business hindering development of regional infrastructure and support for local population
<b>QUESTION: What are the NC's greatest opportunities when it comes to money?</b>		
53	65.43	Support for broadband internet deployment initiatives
28	34.57	Historically high levels of federal funding for recovery will grow the significance of private-public partnerships.
28	34.57	Flight from capital markets has produced large amounts of Capital Gains for individual investors. Qualified Opportunity Funds in Opportunity Zones can capture investment into local real estate development and small-business equity investments.
1	Other Response	An already existing and growing natural (eco-tourism?) tourism market. Learning to properly cater to the market will drive profits, livable wage job opportunities, and generate local, small business wealth that will stay here and be reinvested in the local community.
<b>QUESTION: What are the NC's greatest threats when it comes to money?</b>		
46	56.79	Property tax assessments will change, and tax payments revenues will vary, retail, hospitality and office spaces may decline.
40	49.38	Newcomers bring new and increased demand for public services.
1	Other Response	"Flight from capital markets has produced large amounts of Capital Gains for individual investors. Qualified Opportunity Funds in Opportunity Zones can capture investment into local real estate development and small-business equity investments."
2	Other Response	Short-term rentals and "outside money" artificially inflating real estate prices depleting affordable units for locals.
2	Other Response	Community unwillingness to welcome new people and ideas; discreet or direct development pushback by municipal board members and staff thereby discouraging and dissuading investors.
2	Other Response	Climate change is affecting the environment (i.e., less snow) and therefore way of life and tourism attraction. / Growing threat of limitations being placed on tourism.

## Markets

Count	Percentage	Answer
<b>QUESTION: What are the NC's greatest strengths when it comes to markets?</b>		
59	72.84	Willingness to seek and pay a premium for locally sourced goods has been accelerated. Local farming is growing in popularity as interruptions to national and global supply chains are interrupted.
44	54.32	Perception of relative safety and increased "stay-cations" will increase desirability of smaller in-town retail areas that offer authentic local experience.
2	Other Response	Spending local means, you know the people you're buying from, and the investment stays local.
<b>QUESTION: What are the NC's greatest weaknesses when it comes to markets?</b>		
52	64.2	Over-reliance on tourism and minimum wage jobs.
38	46.9	Reliability and security of internet connectivity for local services like tele-medicine, remote mental health counseling, virtual public hearings, remote education, and remote work. Low levels of high-speed connection in parts of the region may limit access.
32	39.51	Lack of quality accessible child-care will continue to strain families as pandemic public health measures limit capacity and daily operations.
1	Other Response	Disagree that reliance on tourism and minimum wage jobs belong together. Just the over-reliance on minimum wage jobs, or rather, the lack of career-driven job opportunities that include possible advancement, benefits, and paid time off.
2	Other Response	Growing movements to limit tourism in the region / Dependence on tourism as an economic driver
1	Other Response	It's not just childcare, comprehensive early childhood development is holding us back vs. our southern neighbors.
<b>QUESTION: What are the NC's greatest opportunities when it comes to markets?</b>		
35	43.21	If adequate broadband infrastructure is successfully deployed, smaller-rural communities can improve access to world-class services and resources regardless of their physical location.
25	30.86	Manufacturing jobs will return as in-shoring trends increase due to Covid-19 and prior concerns regarding the environment, increased costs abroad and Intellectual Property issues. Workforce training and retention will be critical in manufacturing site location decisions.
27	33.33	Encourage niche industries.
<b>QUESTION: What are the NC's greatest threats when it comes to markets?</b>		
35	43.21	Large retail spaces will be challenged as consumers move to more online shopping and home delivery options. Productive reuse of closing retail spaces for housing, warehousing, and manufacturing will be essential.
34	41.98	Tourism declines as economic driver.
26	32.1	Increases in home-delivery goods, including groceries and meals coupled with a decline in off-shore buying of recyclables will mean more recycling materials (especially cardboard) will need to be retained and disposed of (or re-used) locally. The capacity and content of local landfills will become a concern.

## People

Count	Percentage	Answer
QUESTION: What are the NC's greatest <b>strengths</b> when it comes to <b>people</b> ?		
61	75.31	Strong, close-knit communities.
25	30.86	Quality labor force.
23	28.4	Established non-profits with varying capacities.
3	Other Responses	Resilience/ re-investment
QUESTION: What are the NC's greatest <b>weaknesses</b> when it comes to <b>people</b> ?		
53	65.43	Attractiveness of the place to young people.
52	64.2	Lack of accessible, reliable childcare.
2	Other Response	Over-reliance on tourism, seasonal and low-pay wages.
6	Other Response	Lack of affordable housing, relatively high cost of living, "Work, Stay, Play" model is not affordable with current local career opportunities.
2	Other Response	Lack of skilled/quality labor force; lack of training opportunities for skilled trade workers
QUESTION: What are the NC's greatest <b>opportunities</b> when it comes to <b>people</b> ?		
45	55.56	Workforce training opportunities in high schools.
31	38.27	As remote work increases in popularity, local community will be reduced and new remote workers from outside the region will increase the local population.
23	28.4	Higher paying jobs are available, but difficult to fill.
QUESTION: What are the NC's greatest <b>threats</b> when it comes to <b>people</b> ?		
51	62.96	Labor force development needs to be developed.
46	56.79	Power base is located in southern half of the state.

## Place

Count	Percentage	Answer
QUESTION: What are the NC's greatest <b>strengths</b> when it comes to <b>place</b> ?		
52	64.2	Abundance of natural aesthetic places.
30	37.04	Natural Resources base is essentially intact.
33	40.74	Areas with large numbers of vacation and/or seasonal dwellings will see an increase in full-time residency conversions, bring new investment but also will demand more educational and municipal services.
QUESTION: What are the NC's greatest <b>weaknesses</b> when it comes to <b>place</b> ?		
38	46.91	Lack of understanding of the environmental impacts of development.
37	45.68	Building and life-safety codes can present barriers to new trends such as mixed-use buildings. Municipalities will need to seek affordable ways to encourage in-town redevelopment and upgrading of older housing stock.
31	38.27	Lack of land use planning for influx of climate refugees.
1	Other Response	Rurality of the region makes it difficult to centralize and provide affordable services; discrepancies between those who want to see land developed for economic activity and those who wish to see no development (want to keep land open and rural).
QUESTION: What are the NC's greatest <b>opportunities</b> when it comes to <b>place</b> ?		
60	74.07	Underutilized office spaces could be converted into housing opportunities as an alternative use that addresses a pressing need in the region for a more diverse and affordable housing supply.
31	38.27	As remote work increases in popularity, local commuting will be reduced and new remote workers from outside the region will increase the local population.
QUESTION: What are the NC's greatest <b>threats</b> when it comes to <b>place</b> ?		
58	71.6	Demand for local housing may intensify as fewer young people migrate out, and more outsiders immigrate in new housing construction remains below the units needed for existing housing replacement and to meet new demand. Building material costs are experiencing significant increases.
35	43.21	Potential impact of over and/or improper utilization of natural recreation areas.

## Land Use

Count	Percentage	Answer
<b>QUESTION: What are the NC's greatest strengths when it comes to land use?</b>		
59	72.84	Use of public spaces, including roadways, parking spaces and public sidewalks will be used frequently for small, and pop-up events such as outdoor dining, art exhibits, etc. Local village and downtown infrastructure and historic development patterns will provide a ready-made canvas for such changes.
25	30.86	Parking spaces requirements will continue to be reduced from outdated standards as the capacity of businesses is reduced and reuse of outdoor spaces become more common and attractive.
2	Other Response	Good mix/a lot of conserved land already available.
<b>QUESTION: What are the NC's greatest weaknesses when it comes to land use?</b>		
54	66.67	Comprehensive broadband, cell and wi-fi access.
42	51.85	Fragmented telecommunications.
4	Other Response	Zoning and land use ordinances do not allow for cost effective development (specifically housing).  Zoning limitations/restrictions: need for small lot development with more green space; vacation rentals allowed in residentially zones areas, local involvement in master plan development & zoning amendments & monitoring of growth pursuant to that guidance, fragmented & contrary policies (i.e., should be encouraging "ADU" rather than prohibiting them.
<b>QUESTION: What are the NC's greatest opportunities when it comes to land use?</b>		
42	51.85	As more people live and work in the same place, single-use zoning will be challenged. The new diversity of uses at a site will require adjustments to local zoning ordinances to continue to promote economic health.
29	35.8	Use energy production locally such as solar energy.
25	30.86	Encourage local energy and heat production and conservation.
1	Other Response	Reintroducing hydro for energy production. Incentivize/Facilitate agribusiness/small-scale farming and husbandry to ensure sustainable open spaces.
<b>QUESTION: What are the NC's greatest threats when it comes to land use?</b>		
56	69.14	Natural resources, access points, and travel ways must be protected from the impacts of overuse.
59	72.84	Age and deterioration of existing housing stock.