

New Hampshire



New Hampshire employed nearly 5,000 in the bioscience industry in 2012 across 256 business establishments. The state has a specialization in medical devices and equipment with a location quotient of 1.35 meaning a 35 percent greater concentration of medical device jobs in New Hampshire relative to the national average. Two state subsectors had net employment gains from 2007 to 2012—research, testing, and medical labs and drugs and pharmaceuticals. These gains were not enough, however, to offset job losses in other subsectors during this 5-year period. New Hampshire's academic bioscience R&D activity is highly concentrated with its research universities spending nearly \$220 million in 2012 which equates to a much higher than average R&D expenditure on a per capita basis.

Bioscience Performance Metrics

Summary of State Performance in Selected Bioscience-related Metrics

Metric	New Hampshire	United States	Quintile
Bioscience Industry, 2012			
Bioscience Industry Employment	4,952	1,619,746	V
Bioscience Industry Location Quotient	0.64	n/a	IV
Bioscience Industry Establishments	256	73,088	V
Academic Bioscience R&D Expenditures, FY 2012			
Bioscience R&D (\$ thousands)	\$219,870	\$38,139,876	IV
Bioscience Share of Total R&D	55%	61%	III
Bioscience R&D Per Capita	\$166	\$119	I
NIH Funding, FY 2013			
Funding (\$ thousands)	\$93,273	\$22,293,255	IV
Funding Per Capita	\$70	\$70	II
Bioscience Venture Capital Investments, 2009–13 (\$ millions)	\$145.2	\$49,401.7	III
Bioscience and Related Patents, 2009–13	1,003	100,238	III

State ranking figures for bioscience performance metrics are calculated as quintiles, where I = top quintile, III = middle quintile, and V = bottom quintile.

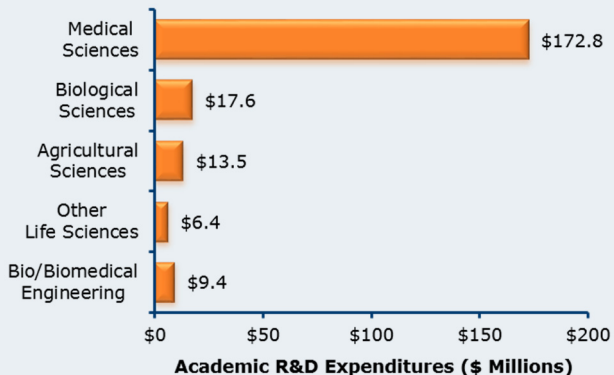
For source notes, see end of State Profile.

Industry Subsector	New Hampshire		United States	
	2012	2007–2012 Change	2012	2007–2012 Change
Agricultural Feedstock & Chemicals				
Establishments	3	130.8%	1,772	5.2%
Employment	16	503.5%	76,404	-1.0%
Location Quotient	0.04		n/a	
Direct-Effect Employment Multiplier	12.1		18.1	
Total Employment Impact	191		1,382,637	
Average Annual Wage	\$45,157	-34.9%	\$75,828	14.2%
Bioscience-Related Distribution				
Establishments	84	7.4%	36,793	1.4%
Employment	703	-10.3%	442,016	-3.9%
Location Quotient	0.35		n/a	
Direct-Effect Employment Multiplier	2.7		2.7	
Total Employment Impact	1,902		1,199,015	
Average Annual Wage	\$76,890	2.4%	\$85,188	11.5%
Drugs and Pharmaceuticals				
Establishments	8	-33.3%	3,057	12.0%
Employment	1,063	13.7%	284,331	-10.9%
Location Quotient	0.79		n/a	
Direct-Effect Employment Multiplier	7.4		9.9	
Total Employment Impact	7,888		2,673,265	
Average Annual Wage	\$73,721	14.3%	\$106,576	13.9%
Medical Devices and Equipment				
Establishments	60	5.3%	7,235	12.0%
Employment	2,239	-29.4%	349,432	1.4%
Location Quotient	1.35		n/a	
Direct-Effect Employment Multiplier	3.3		3.9	
Total Employment Impact	7,353		1,318,459	
Average Annual Wage	\$61,604	2.8%	\$75,695	10.7%
Research, Testing, and Medical Laboratories				
Establishments	101	18.8%	24,231	31.0%
Employment	930	15.3%	467,563	9.7%
Location Quotient	0.42		n/a	
Direct-Effect Employment Multiplier	2.7		2.7	
Total Employment Impact	2,491		1,284,196	
Average Annual Wage	\$89,658	15.2%	\$91,248	15.9%
Total Bioscience Industry				
Establishments	256	9.6%	73,088	11.4%
Employment	4,952	-13.1%	1,619,746	-0.4%
Location Quotient	0.64		n/a	
Direct-Effect Employment Multiplier	4.2		4.9	
Total Employment Impact	20,738		7,857,572	
Average Annual Wage	\$71,595	9.7%	\$88,202	12.8%
Total Private Sector				
Establishments	46,341	-0.9%	8,699,564	-0.5%
Employment	527,175	-3.1%	111,137,206	-3.1%
Average Annual Wage	\$48,736	10.0%	\$49,130	11.1%

Note: U.S. employment metrics include Puerto Rico. Estimates of total impacts do not include Puerto Rico.

Bioscience Research in New Hampshire

Bioscience Academic R&D Expenditures, FY 2012



NIH Awards, 2009–2013

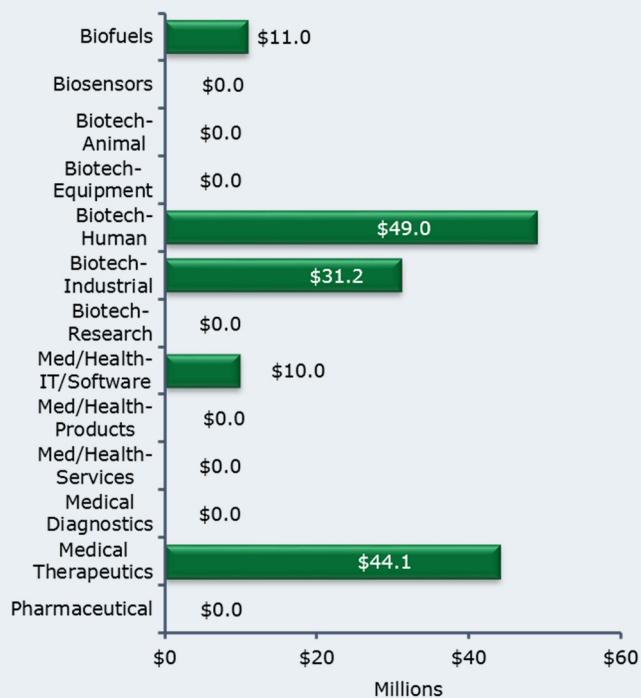


Bioscience Venture Capital in New Hampshire

Bioscience-Related Venture Capital Investments, 2009–2013

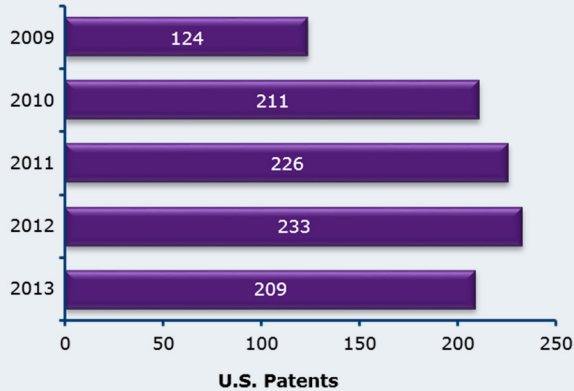


Bioscience-Related Venture Capital Investments by Segment, 2009–2013

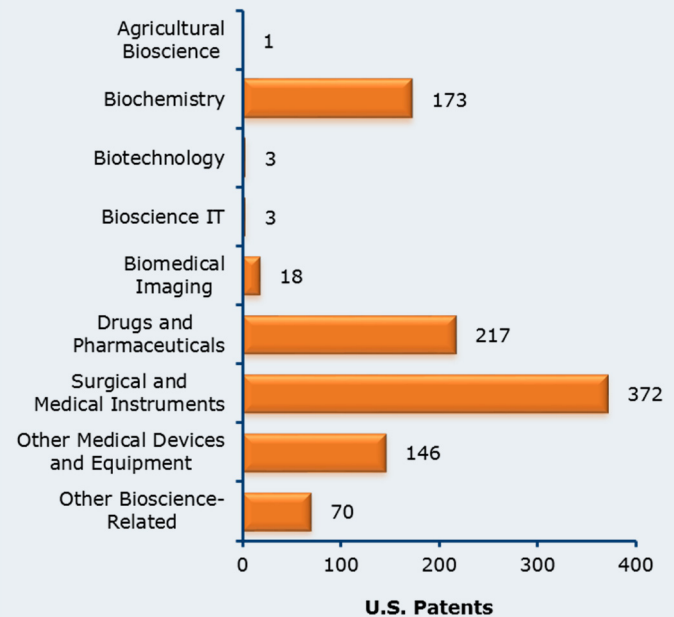


Bioscience Patents in New Hampshire

Bioscience-Related Patents, 2009–2013



Bioscience-Related Patents by Segment, 2009–2013



Source Notes

Employment, Establishments, and Wages: U.S. Bureau of Labor Statistics, Quarterly Census of Employment and Wages (QCEW), enhanced file from the IMPLAN Group, LLC.

Employment Multipliers: IMPLAN Group, LLC state-level Input/Output models.

Academic R&D Expenditures: National Science Foundation (NSF) Higher Education Research and Development (HERD) Survey.

NIH Funding: National Institutes of Health, *NIH Awards by Location & Organization* (summary information within RePORT database), and NIH-managed funding for FY 2009 and FY 2010 from the American Recovery and Reinvestment Act (ARRA) website.

Venture Capital: Thomson Reuters Thomson ONE venture capital database.

Patents: U.S. Patent & Trademark Office data from Thomson Reuters Delphion Patent Analysis Database.

For a more detailed discussion of the data and methodology used, please see the Appendix to the full national report.