The New Hampshire Labor Market

presented to the

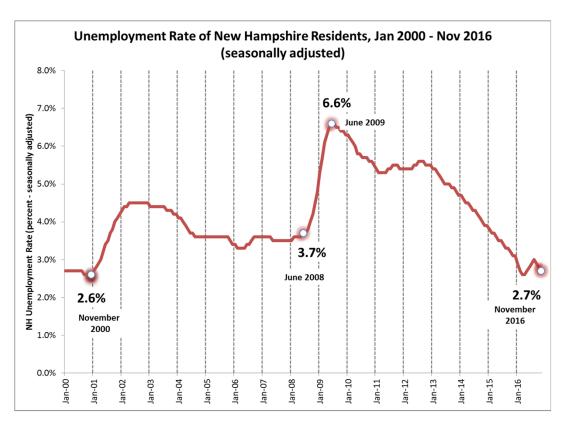
New Hampshire Senate and House of Representatives Finance and Ways and Means Committees Concord, New Hampshire

January 10, 2017

Bruce DeMay, Director Economic and Labor Market Information Bureau New Hampshire Employment Security

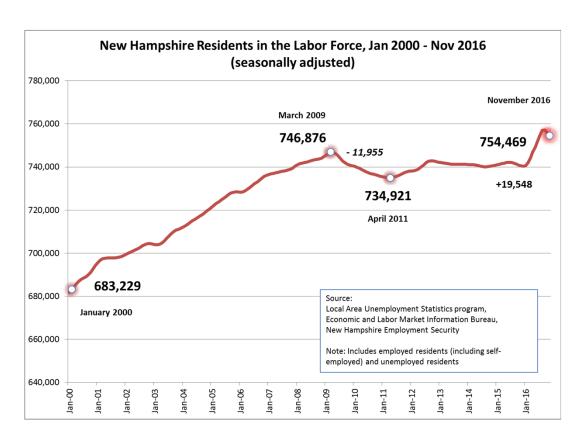
New Hampshire's unemployment rate is 2.7%

- The latest New Hampshire unemployment rate was estimated at 2.7% for November 2016
- The 2.7% ranks New Hampshire as lowest in the nation, tied with South Dakota
- The fluctuation in the 2016 unemployment rate (within the 2.6%-3.0% band) will be smoothed during the annual benchmark process early this year.
- The annual average unemployment rate for 2016 should come in at around 2.8%.



Recent Growth in the Labor Force

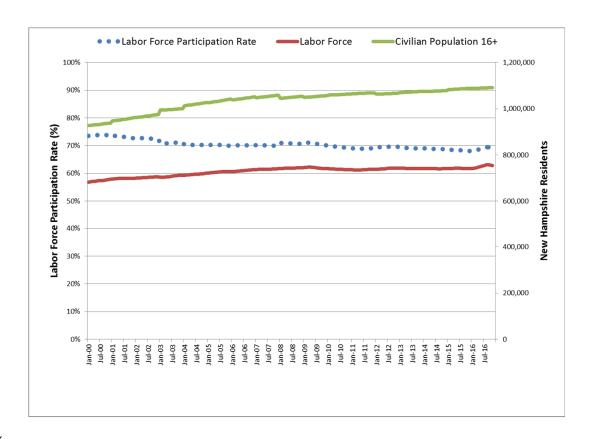
- New Hampshire's Labor Force peaked in March 2009, suffered during the recession and its aftermath, recovered slowly, and until recently has remained relatively flat.
- Slow population growth, the recession, and a slight drop in labor force participation combined to reduce the civilian labor force after March 2009.
- Recent positive net migration and a slight increase in the participation rate have helped boost the New Hampshire labor force.



Civilian Non-Institutional Population Age 16+ Supplies Labor Force

Slower population growth is one factor that leads to slower labor force growth

- From January 2000 through December 2007, New Hampshire's Civilian Population grew by about 16,600 each year
- From December 2007 through November 2015, Civilian Population grew by approximately 3,600 each year
- Labor Force Participation has been declining long-term:
 - January 2000 = 73.6%
 - December 2007 = 69.9%
 - November 2016 = 69.1%
 - Had reached recent low of 68.0% in July 2015
 - Last five months ranged from 69.1% to 69.4%

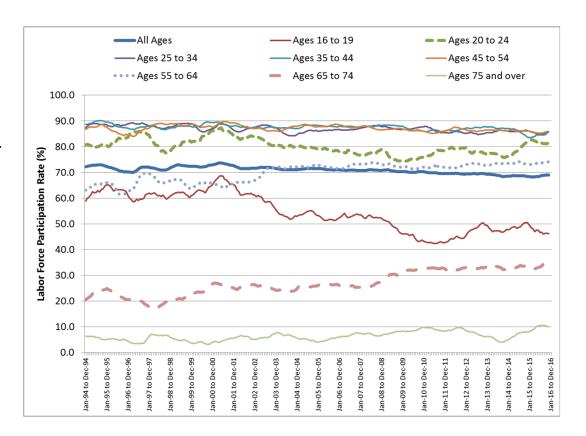


Trends in New Hampshire Labor Force Participation Rates

In 2016 there was a slight uptick in the labor force participation rate (LFPR).

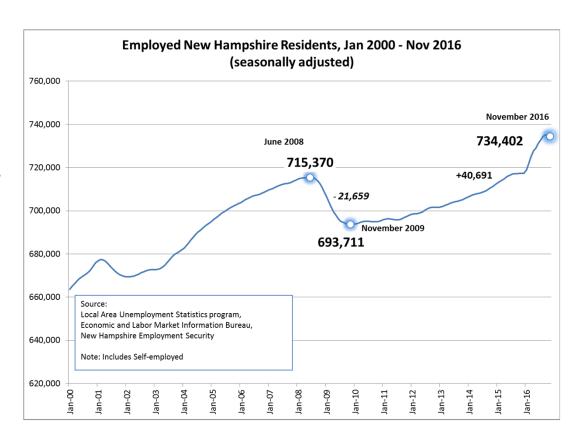
Longer term trends:

- The LFPR for persons ages 16-19 has rebounded since the recession.
- The LFPR for persons ages 20-24 is at its highest in fifteen years.
- The LFPR of persons ages 55 to 64
 has been increasing significant
 because this is the largest segment
 of our population.
- The LFPR for persons ages 65-74
 has risen since the recession,
 continuing a long-term trend; this
 is affected by the labor market
 behavior of Boomers reaching 65
 years more staying in and
 working.



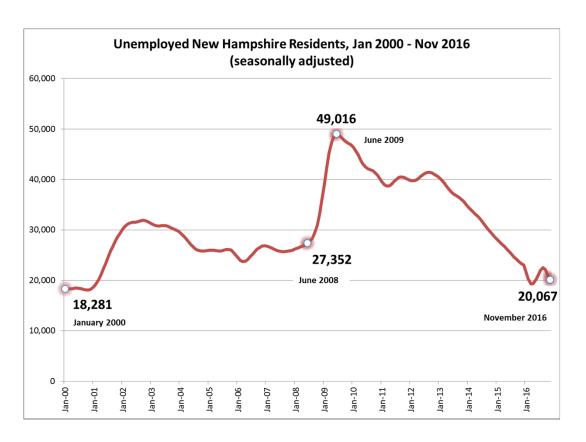
Employed New Hampshire Residents

- The number of employed New Hampshire residents was estimated at 734,402 in November 2016
- The number of employed residents dropped over 21,000 from the prerecession peak to its lowest point in 2009
- Since November 2009, over 40,000 more New Hampshire residents are employed
- Estimates include self-employed persons



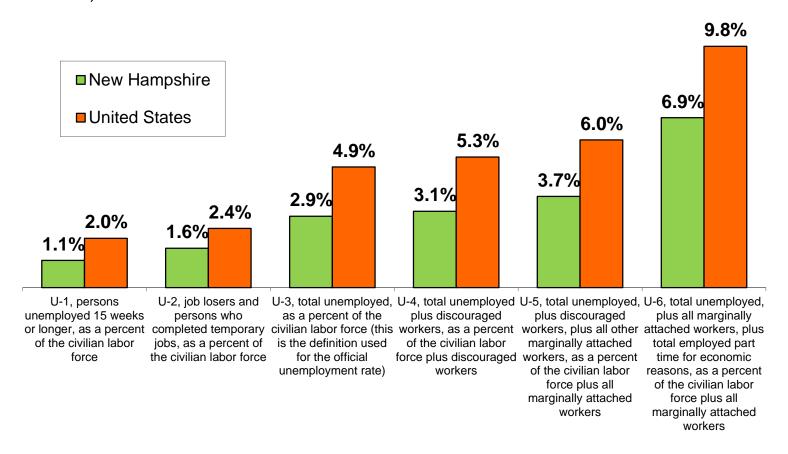
Unemployment is close to what it was in 2000

- The number of unemployed New Hampshire residents is close to the level in early 2000
- The unemployment rate in January 2000 was 2.7%, the same as in November 2016
- Unemployment has dropped almost 30,000 since its peak in June 2009, in the aftermath of the recession



All New Hampshire measures of labor underutilization are significantly below the national rates

Alternative Measures of Labor Underutilization - NH vs US 4 Quarter averages - 4Q2015-3Q2016 (October 2015-September 2016)



The numbers behind the alternative measures of labor underutilization

- The latest four quarter averages show employment steadily rising
- Unemployment has been steadily decreasing (and was estimated at 20,070 for November 2016, seasonally adjusted)
- The number working part-time for economic reasons has also declined significantly

Note: Alternative Measures of Labor Underutilization are updated each quarter, based on the latest four quarters of data from the Current Population Survey The numbers behind the Alternative Measures of Labor Underutilization for New Hampshire

	I	s	
	2013Q4 - 2014Q3	2014Q4 - 2015Q3	2015Q4 - 2016Q3
	(Oct 2013 – Sep 2014)	(Oct 2014 – Sep 2015)	(Oct 2015 – Sep 2016)
Employed New Hampshire residents *	702,000	716,400	729,000
Employed New Hampshire residents working part-time for economic reasons *	34,600	30,200	24,300
Unemployed New Hampshire residents *	33,800	27,000	21,700
New Hampshire residents who want a job, but have not searched for one in the past month (excluded from the unemployment estimates) *			
Residents who want a job but have not searched for one in the past year	11,100	12,500	10,700
Residents who want a job and have searched for one in the past year, but not in the past month, and are currently not available for work	2,900	2,900	2,800
Residents who want and are available for a job, have searched for a job in the past year, but not in the past month due to discouragement	1,800	1,700	1,600
Residents who want and are available for a job, have searched for one in the past year, but not in the past month due to reasons other than discouragement	5,700	4,000	4,700
Unemployment benefit claimants - New Hampshire residents (all programs) **	8,200	5,300	4,300

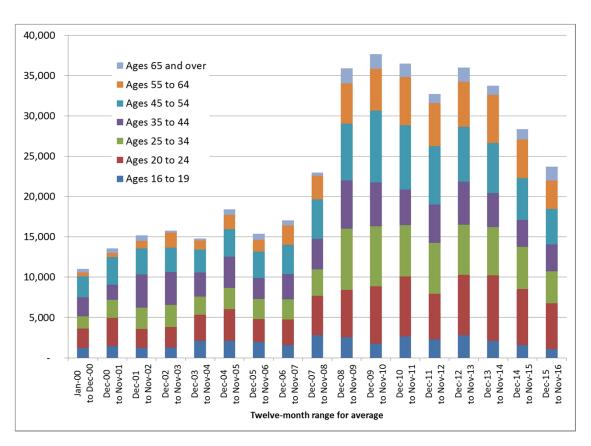
^{*} Based on Current Population Survey (CPS) raw data. The CPS is the only source of data for the various components of the Alternative Measures of Labor Underutilization. The number of residents employed or unemployed, and any rates developed using these numbers may not match those of the Local Area Unemployment Statistics (LAUS) program, which uses additional data in an econometric modeling process to estimate labor force employment and unemployment statistics.

Prepared by New Hampshire Employment Security, Economic and Labor Market Information Bureau, 45 South Fruit Street, Concord, New Hampshire 03301

^{**} Based on Unemployment Insurance (UI) System data. Includes regular UI programs, Emergency Unemployment Compensation (EUC), and Extended Benefits (EB) programs.

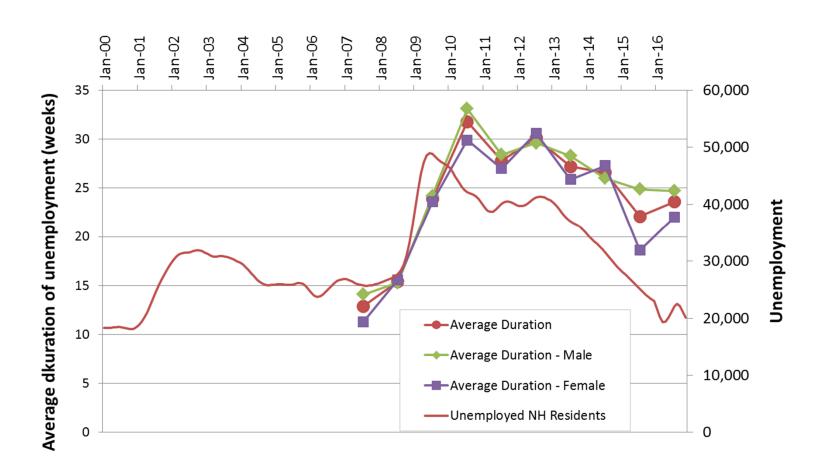
Fewer persons working part-time for economic reasons

- The number or persons working part-time for economic reasons peaked at almost 38,000 during the recession
- Working part-time for economic reasons is generally considered to be involuntary part-time employment; these workers would prefer to be working full time jobs
- From December 2015-November 2016 the average is under 24,000, the lowest it has been in eight years – but still a potential source of labor
- The largest segment of persons working part-time for economic reasons are those workers 20-24 years of age; they most recently number about 5,700



Source: US Census Bureau, unpublished Current Population Survey data (12 Months Average). Prepared by New Hampshire Employment Security, Economic and Labor Market Information Bureau

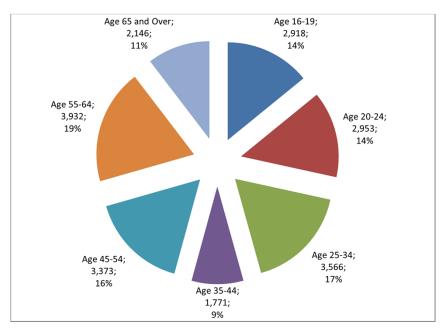
Average Duration of Unemployment has decreased along with the level of unemployment – although the average is affected by the number of long-term unemployed persons

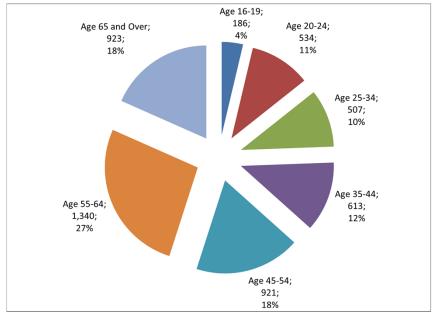


From December 2015-November 2016, on average, about 20,659 New Hampshire residents were unemployed; of these, about 5,024 (24.3%) were long-term unemployed (27+ weeks)

Persons 55-64 years of age accounted for about 19% of the unemployed...

...but accounted for approximately 27% of persons unemployed for 27+ weeks

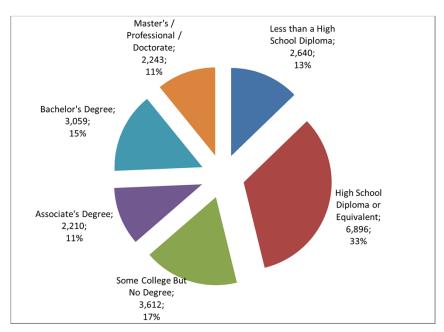


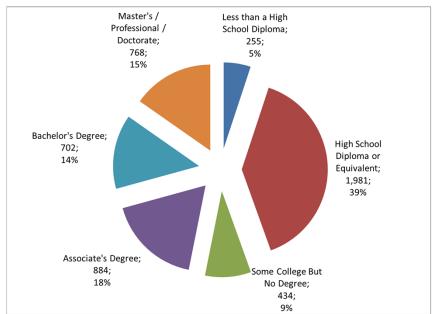


About 33% of the unemployed had a high school diploma or equivalent, but 39% of the long-term (27+ weeks) unemployed had that level of education

Persons with less than a high school diploma accounted for about 13% of the unemployed...

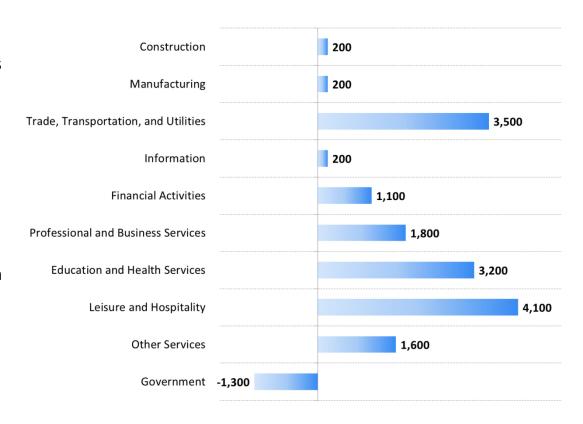
...but only 5% of persons unemployed for 27+ weeks, likely due to younger persons either finding work or leaving the labor market





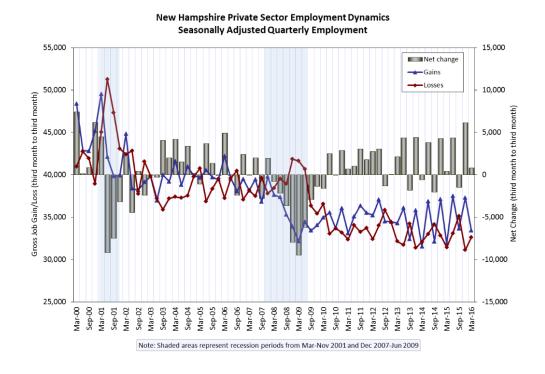
New Hampshire nonfarm jobs increased over-the-year – with broad-based growth

- Seasonally adjusted nonfarm jobs grew over-the-year in most sectors (November 2015 - November 2016)
- Total nonfarm employment (private plus government) was up 2.2%
- Private nonfarm jobs were up2.8%, accounting for all the growth
- The only sector with fewer jobs was Government
 - The decline in Government was primarily at the Local level



Business Employment Dynamics – Net Job Gains

- In eight of the last 12 quarters, ending with 2016Q1, employment at private sector firms adding employees more than offset employment at firms that lost employees over -the-quarter.
- The over-the-quarter net gains in 2016Q1 were the largest since 2000.
- Net job losses by firms reducing employment are drifting downward while net gains by firms increasing employment are ratcheting upward.
- Still, for private firms that have changes in the number of their employees – either a gain or a loss – the numbers of employees being added or lost by these firms is at a much lower level than it was prerecession.



Preliminary short-term industry projections indicate an average annual growth rate of 0.9 percent from 2016Q2-2018Q2 (Preliminary; excludes self-employed)

duotes Titlo	2016 Q2	2018 Q2	2016Q2 to 2018Q2	Percent	Average Annua
dustry Title	Estimated	Projected	Numeric Change	Change	Growth Rate
otal Employment	648,471	660,443	11,972	1.8%	0.9%
oods Producing Industries	96,524	98,309	1,785	1.8%	0.9%
Agriculture, Forestry, Fishing, and Hunting	2,139	2,167	28	1.3%	0.7%
Mining	580	604	24	4.1%	2.0%
Construction	25,716	26,871	1,155	4.5%	2.2%
Manufacturing	68,089	68,667	578	0.8%	0.4%
ervice Providing Industries	551,947	562,134	10,187	1.8%	0.9%
Utilities	2,247	2,172	-75	-3.3%	-1.7%
Wholesale Trade	27,772	28,392	620	2.2%	1.1%
Retail Trade	95,577	96,586	1,009	1.1%	0.5%
Transportation and Warehousing	17,059	17,393	334	2.0%	1.0%
Information	12,496	12,564	68	0.5%	0.3%
Finance and Insurance	29,366	30,060	694	2.4%	1.2%
Real Estate and Rental and Leasing	6,913	6,995	82	1.2%	0.6%
Professional, Scientific, and Technical Services	33,794	34,796	1,002	3.0%	1.5%
Management of Companies and Enterprises	8,679	8,851	172	2.0%	1.0%
Administrative and Waste Management Services	35,266	36,543	1,277	3.6%	1.8%
Educational Services	63,532	64,011	479	0.8%	0.4%
Health Care and Social Assistance	90,070	92,348	2,278	2.5%	1.3%
Arts, Entertainment, and Recreation	11,388	11,579	191	1.7%	0.8%
Accommodation and Food Services	58,248	59,321	1,073	1.8%	0.9%
Other Services, Except Public Admin.	20,502	20,950	448	2.2%	1.1%

Industries projected to add the most jobs over the short-term

- Includes:
 - Ambulatory health care services
 - Hospitals
 - Nursing and residential care services
 - Specialty trade contractors
 - Construction of buildings
- These each have projected growth of at least 200 jobs, up to 1,200 jobs, over the two-year projection period

New H	ampshire Short-term Industry Projections, 2	2016 Q2	to 2018	Q2 (Prelimina	ry)	
NAICS		2016 Q2	2018 Q2	2016Q2 to 2018Q2	Percent	Average Annua
Code	Industry Title	Estimated	Projected	Numeric Change	Change	Growth Rate
561	Administrative and Support Services	33,439	34,641	1,202	3.6%	1.8%
541	Professional, Scientific, and Technical Services	33,794	34,796	1,002	3.0%	1.5%
722	Food Services and Drinking Places	49,309	50,243	934	1.9%	0.9%
621	Ambulatory Health Care Services	31,091	32,000	909	2.9%	1.5%
622	Hospitals	29,271	30,089	818	2.8%	1.4%
238	Specialty Trade Contractors	16,785	17,543	758	4.5%	2.2%
611	Educational Services	63,532	64,011	479	0.8%	0.4%
930000	Local Government, excluding Education ¹	22,180	22,592	412	1.9%	0.9%
523	Financial Investment and Related Activities	6,838	7,195	357	5.2%	2.6%
624	Social Assistance	14,959	15,285	326	2.2%	1.1%
524	Insurance Carriers and Related Activities	14,556	14,828	272	1.9%	0.9%
424	Merchant Wholesalers, Nondurable Goods	7,395	7,655	260	3.5%	1.7%
236	Construction of Buildings	5,762	6,002	240	4.2%	2.1%
623	Nursing and Residential Care Facilities	14,749	14,974	225	1.5%	0.8%
441	Motor Vehicle and Parts Dealers	12,701	12,918	217	1.7%	0.9%
445	Food and Beverage Stores	21,911	22,124	213	1.0%	0.5%
444	Building Material and Garden Equipment and Supplies Dealers	9,944	10,150	206	2.1%	1.0%

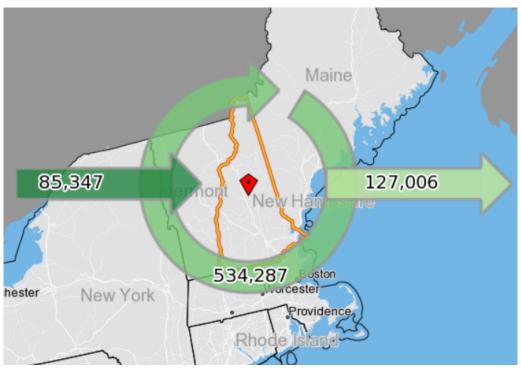
Workers Commute Into and Out of New Hampshire to U.I. Covered Jobs

In 2014, about 661,293 New Hampshire residents worked in at least one job in covered employment

- 534,287 U.I.-covered jobs in New Hampshire were held by New Hampshire residents who stayed in state to work
- 127,006 jobs in other states were held by New Hampshire residents

In 2014, there were about 619,634 jobs in covered employment in New Hampshire

 Since 534,287 of these jobs were held by New Hampshire residents, then 85,347 of these jobs were held by residents of other states commuting into New Hampshire



U.S. Census Bureau. 2016. OnTheMap Application. Longitudinal-Employer Household Dynamics Program. http://onthemap.ces.census.gov/. Data include only employment in jobs covered by unemployment insurance, and exclude self-employed persons.

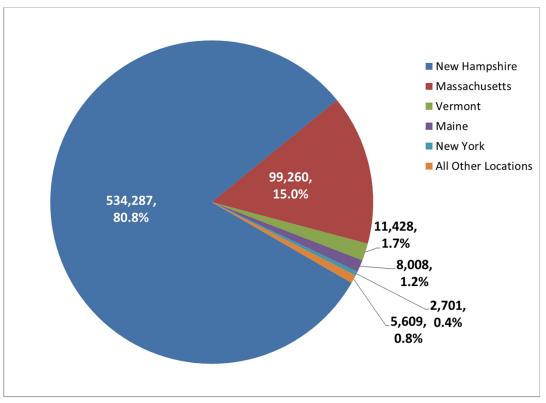
2014 data are the latest available.

Where Workers are Employed Who Live in New Hampshire

Most New Hampshire residents who work in covered employment stay in state to work

Of the 127,006 jobs in other states that were held by New Hampshire residents:

- 99,260 were in Massachusetts
- 11,428 were in Vermont
- 8,008 were in Maine



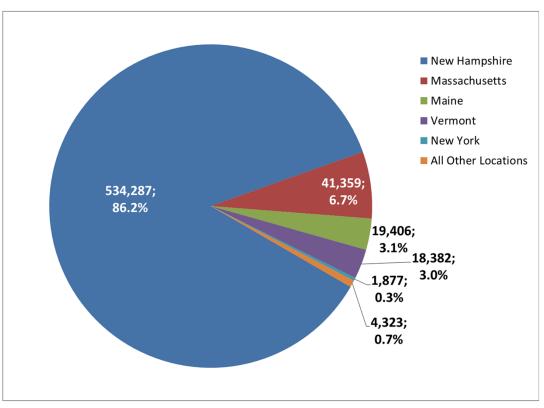
U.S. Census Bureau. 2016. OnTheMap Application. Longitudinal-Employer Household Dynamics Program. http://onthemap.ces.census.gov/. Data include only employment in jobs covered by unemployment insurance, and exclude self-employed persons.

Where Workers Live Who are Employed in New Hampshire

Most New Hampshire jobs in covered employment are held by New Hampshire residents

Of the 85,347 New Hampshire jobs in covered employment that were held by residents of other states:

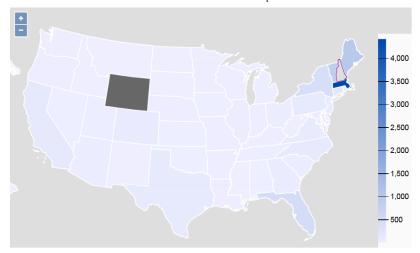
- 41,359 were held by Massachusetts residents
- 19,406 were held by Vermont residents
- 18,382 were held by Maine residents



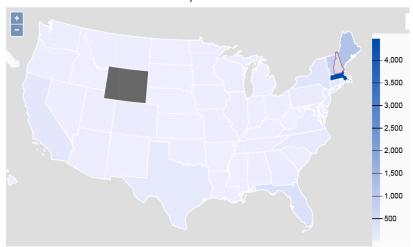
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During 2015Q2, what was the inflow/outflow of workers by geography? Where did employees come from? Where did they go?

Job-to-Job Flows from 50 States to New Hampshire



Job-to-Job Flows from New Hampshire to 50 States



Source: U.S. Census Bureau. 2017. Job-to-Job Flows Data (Beta). Longitudinal Employer-Household Dynamics Program. http://lehd.ces.census.gov/data/#j2jj2j

During 2015Q2, what was the inflow/outflow of workers by age?

These estimates are for newly-hired employees in covered employment who have moved to another job during 2015Q2 or from 2015Q1

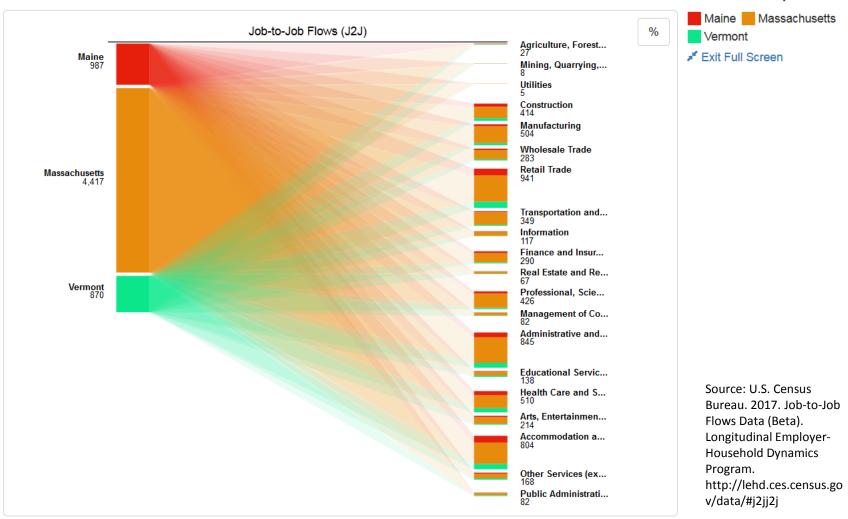
- These are employees with short or no nonemployment spells
- Both to Massachusetts alone, and to all other states, New Hampshire had a slight deficit in the three youngest age groups, but a surplus in all age groups age 25 and up.
- Not shown is the movement from job-to-job in New Hampshire alone, which totaled 24,654 for 2015Q2

	From All	From NH		
	Other	to All		
	States to	Other	From MA	From NH
Origin/Destination	NH	States	to NH	to MA
Age				
14-18	2,270	2,307	129	176
19-21	4,773	4,840	507	659
22-24	4,489	4,694	523	697
25-34	8,606	8,450	1,165	1,104
35-44	5,096	4,946	793	676
45-54	4,881	4,766	778	676
55-64	3,101	2,968	442	407
65-99	794	701	87	78
Total	34,010	33,672	4,424	4,473

Source: U.S. Census Bureau. 2017. Job-to-Job Flows Data (Beta). Longitudinal Employer-Household Dynamics Program. http://lehd.ces.census.gov/data/#j2jj2j

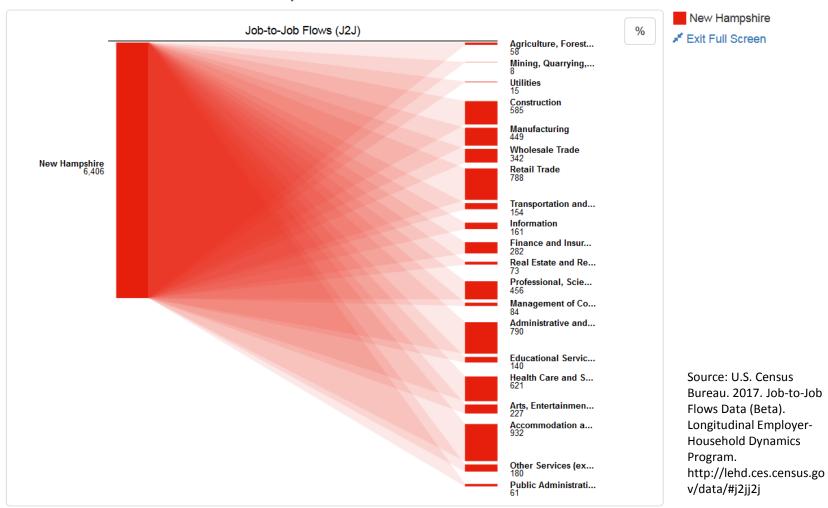
In 2015Q2, over 6,200 jobs in New Hampshire were held by workers who had jobs in Massachusetts, Maine, or Vermont during 2015Q2 or the previous quarter

Job-to-Job Flows from Maine, Massachusetts and Vermont to 20 Industries in New Hampshire



In 2015Q2, about 6,400 jobs in Massachusetts, Maine, and Vermont were held by workers who had jobs in New Hampshire during 2015Q2 or the previous quarter

Job-to-Job Flows from New Hampshire to 20 Industries in Maine, Massachusetts or Vermont



Job-to-Job flows by industry: New Hampshire to Massachusetts, 2015Q2

Origin NH - Destination MA	Agriculture, Forestry, Fishing and Hunting	Mining, Quarrying, and Oil and Gas Extraction	Utilities	Construction	Manufacturing	Wholesale Trade	Retail Trade	Transportation and Warehousing	Information	Finance and Insurance	Real Estate and Rental and Leasing	Professional, Scientific, and Technical Services	Management of Companies and Enterprises	Administrative and Support and Waste Management and Remediation Services	Educational Services	Health Care and Social Assistance	Arts, Entertainment, and Recreation	Accommodation and Food Services	Other Services (except Public Administration)	Public Administration	
Agriculture, Forestry, Fishing and Hunting	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	1
Mining, Quarrying, and Oil and Gas Extraction	0	0	0	4	2	0	0	1	0	0	0	0	0	0	0	0	0	0	0	0	7
Utilities	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Construction	0	0	1	190	6	2	6	1	4	0	4	17	2	18	0	0	0	1	2	0	254
Manufacturing	1	2	0	23	113	82	9	6	8	3	1	46	4	51	3	10	1	13	4	3	383
Wholesale Trade	1	0	1	15	23	55	9	6	13	5	0	23	6	20	0	8	1	5	2	0	193
Retail Trade	13	0	1	61	47	35	327	24	24	26	7	48	16	93	17	74	40	124	33	7	1017
Transportation and Warehousing	0	0	0	14	8	5	17	23	1	2	2	1	2	17	1	1	3	2	4	0	103
Information	0	0	0	0	5	9	3	0	21	5	1	16	1	5	1	6	1	2	0	1	77
Finance and Insurance	0	0	0	1	4	5	6	0	5	105	0	13	7	7	0	7	3	3	1	0	167
Real Estate and Rental and Leasing	0	0	1	4	2	0	2	2	4	1	16	4	0	8	1	0	0	1	0	2	48
Professional, Scientific, and Technical Services	2	0	3	5	32	8	11	2	34	24	0	101	6	38	6	10	1	4	5	2	294
Management of Companies and	4	1	0	3	7	7	8	2	2	1	1	5	3	6	2	6	1	4	1	1	65
Administrative and Support and Waste	2	0	0	58	53	25	23	19	11	15	1	48	7	214	8	34	1	32	12	2	565
Educational Services	1	0	2	3	8	5	9	4	2	4	0	18	2	9	34	17	12	18	4	5	157
Health Care and Social Assistance	0	0	0	5	6	5	13	4	2	3	0	14	1	22	9	176	11	23	2	1	297
Arts, Entertainment, and Recreation	0	0	2	6	1	6	13	1	1	2	4	12	1	5	6	5	24	18	11	1	119
Accommodation and Food Services	6	0	0	28	16	15	34	10	7	6	5	13	7	41	7	38	32	276	12	3	556
Other Services (except Public Administration)	0	0	0	7	4	6	15	2	1	1	1	10	2	15	1	6	2	9	21	0	103
Public Administration	0	0	1	7	2	0	3	0	1	3	1	2	1	8	5	5	2	1	4	0	46
	30	3	12	434	339	270	508	107	141	206	44	391	68	577	101	403	136	536	118	28	4452

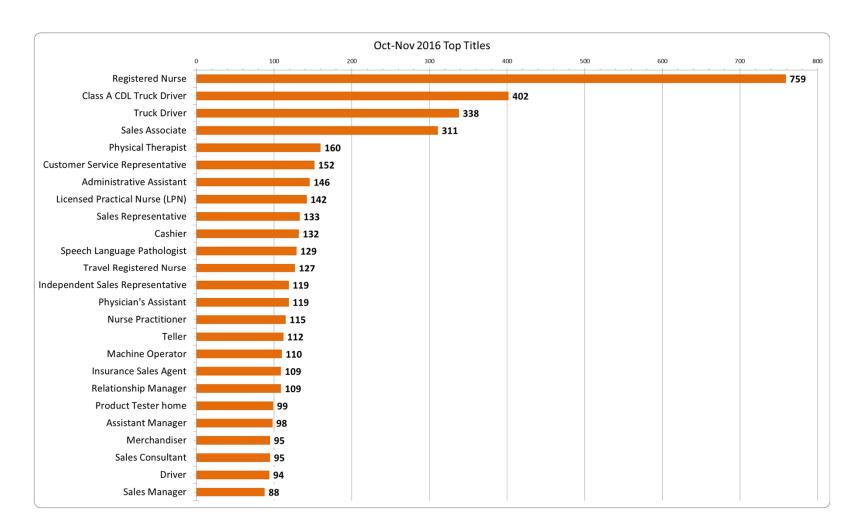
Source: U.S. Census Bureau. 2017. Job-to-Job Flows Data (Beta). Longitudinal Employer-Household Dynamics Program. http://lehd.ces.census.gov/data/#j2jj2j

Job-to-Job flows by industry: Massachusetts to New Hampshire, 2015Q2

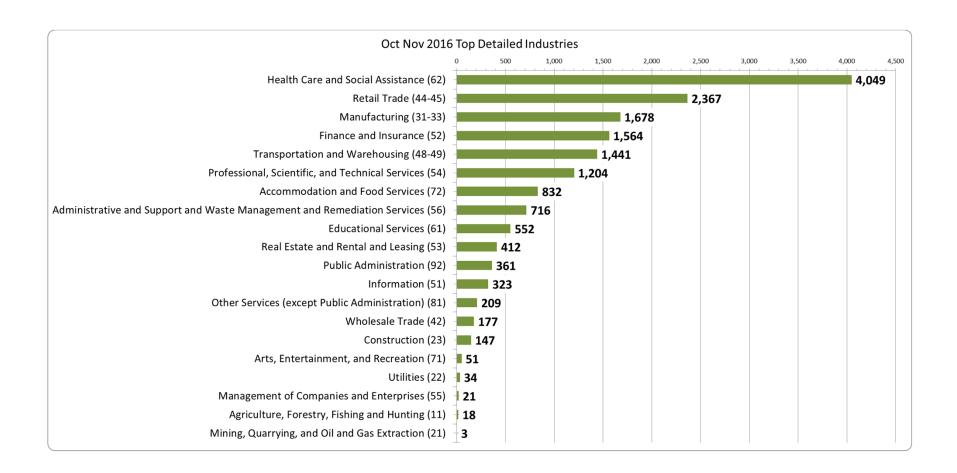
Origin MA- Destination NH	Agriculture, Forestry, Fishing and Hunting	Mining, Quarrying, and Oil and Gas Extraction	Utilities	Construction	Manufacturing	Wholesale Trade	Retail Trade	Transportation and Warehousing	Information	Finance and Insurance	Real Estate and Rental and Leasing	Professional, Scientific, and Technical Services	Management of Companies and Enterprises	Administrative and Support and Waste Management and Remediation Services	Educational Services	Health Care and Social Assistance	Arts, Entertainment, and Recreation	Accommodation and Food Services	Other Services (except Public Administration)	Public Administration	
Agriculture, Forestry, Fishing and Hunting	0	0	0	0	0	0	4	0	0	0	0	0	0	4	0	0	0	0	0	1	9
Mining, Quarrying, and Oil and Gas Extraction	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Utilities	0	0	0	0	0	0	0	0	0	2	0	0	0	0	1	0	0	0	0	0	3
Construction	1	2	0	156	28	12	10	2	1	3	3	5	1	22	3	2	5	7	3	1	267
Manufacturing	0	0	1	10	184	36	21	10	5	7	5	29	7	51	1	6	2	8	3	2	388
Wholesale Trade	0	0	0	6	27	47	16	218	4	6	0	15	9	29	2	4	1	8	1	4	397
Retail Trade	1	0	0	10	25	28	305	12	9	13	6	14	7	44	6	14	22	69	12	7	604
Transportation and Warehousing	0	1	2	9	7	5	17	28	3	0	3	1	3	13	2	1	1	12	6	1	115
Information	0	0	0	2	5	13	20	1	36	7	1	26	0	16	2	0	1	5	2	0	137
Finance and Insurance	0	0	0	1	3	1	5	0	0	106	0	13	5	9	0	2	2	4	0	0	151
Real Estate and Rental and Leasing	0	0	0	6	1	4	2	1	0	0	17	1	2	4	1	0	1	3	1	1	45
Professional, Scientific, and Technical Services	2	0	1	15	36	27	14	7	16	27	6	154	6	72	6	11	5	10	1	5	421
Management of Companies and	0	0	0	4	3	16	12	3	0	9	2	2	5	6	2	4	2	3	2	0	75
Administrative and Support and Waste	0	0	0	23	42	16	35	7	5	22	1	32	3	213	6	18	9	21	8	9	470
Educational Services	1	0	1	4	6	3	21	0	4	2	1	11	1	9	28	15	26	39	10	6	188
Health Care and Social Assistance	1	0	2	2	9	2	37	2	0	7	1	10	5	36	16	197	13	35	10	5	390
Arts, Entertainment, and Recreation	1	0	0	4	2	2	7	1	2	1	0	3	0	11	1	1	29	17	1	1	84
Accommodation and Food Services	1	0	2	11	12	5	71	7	4	5	0	7	4	59	3	15	19	241	14	5	485
Other Services (except Public Administration)	0	0	0	3	7	3	14	0	1	1	1	6	2	7	1	6	4	16	23	3	98
Public Administration	1	0	0	1	1	1	6	1	1	0	0	2	1	3	1	1	4	2	2	1	29
	9	3	9	267	398	221	617	300	91	218	47	331	61	608	82	297	146	500	99	52	4356

Source: U.S. Census Bureau. 2017. Job-to-Job Flows Data (Beta). Longitudinal Employer-Household Dynamics Program. http://lehd.ces.census.gov/data/#j2jj2j

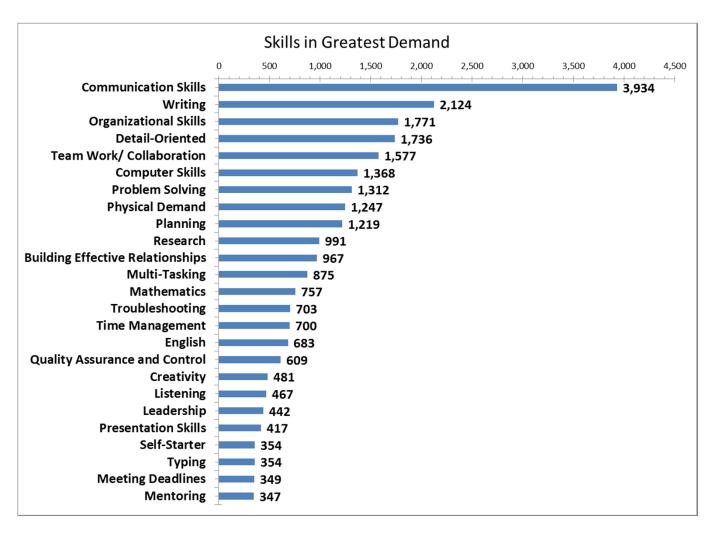
What employers are looking for: Top 25 Job Titles – New Hampshire online job postings, October 1 – November 30, 2016. There were 20,443 online postings during that time period.



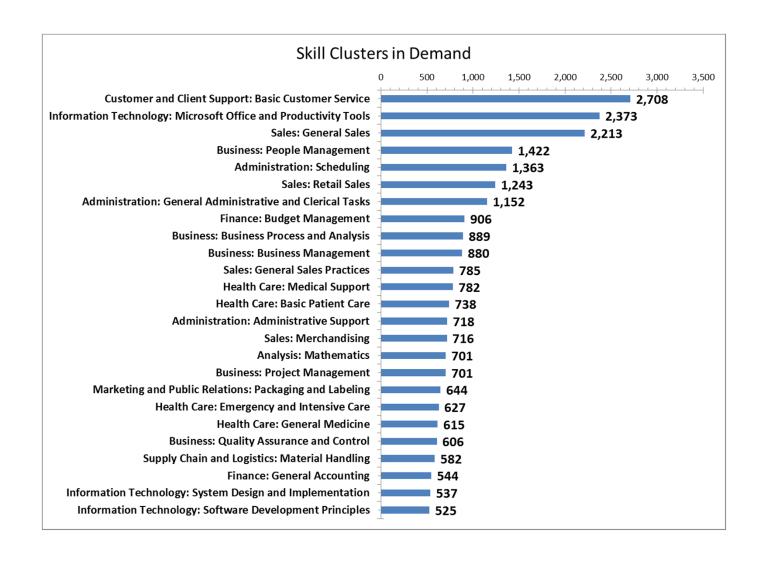
What employers are looking for: Top Detailed Industries – New Hampshire online job postings, October 1 – November 30, 2016. Of the 20,443 online postings, 16,212 could be assigned an Industry.



What employers are looking for: Employers listed skills they wanted in about 12,400 of the 20,400 jobs posted between October 1, 2016-November 30, 2016

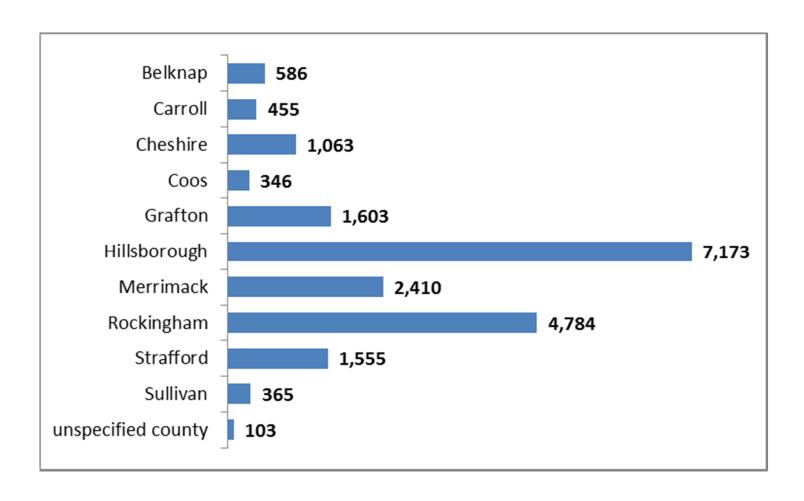


What employers are looking for: Skill clusters in demand could be identified for about 10,000 of the jobs posted between October 1, 2016-November 30, 2016



What employers are looking for:

Almost 60% of the online job postings from October 1 – November 30, 2016 were postings for Hillsborough and Rockingham counties.



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