

ECONOMIC CONDITIONS in New Hampshire



January 2000

Volume 100, Number 01

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New Hampshire R&D Intensive Average Weekly Wage Exceeded \$1,000 in 1998

Research and development (R&D) intensive high technology industries' average weekly wage in New Hampshire grew 7.9 percent from \$936 in 1997 to \$1,010 in 1998. The annual rate of increase had been accelerating from 5.8 percent in 1996 to 6.8 percent in 1997. From 1995 to 1998 the average weekly wage for these industries grew 22.0 percent.

High tech employment and wages have been booming from 1995 to 1998. R&D intensive high tech industries' total wages skyrocketed 41.6 percent from \$2.1 billion in 1995 to \$3.0 billion in 1998. Average annual employment increased 16.0 percent from 49,924 in 1995 to 57,935 in 1998. Average weekly wage soared 22.0 percent from \$827.86 in 1995 to \$1,009.83 in 1998. Every year during this period marked an increasing rate of growth. Annual average weekly wage growth in R&D intensive high tech industries accelerated from 5.2 percent in 1995 to 7.9 percent in 1998.

Thirty industries having a number of R&D workers at least 50 percent higher than the average proportion for all industries were identified and classified as R&D intensive by an Occupational Employment Survey in the late 1980s. In New Hampshire, 24 of those industries had employment in 1998 and are listed in the accompanying table.

Eight of the 24 industries' average weekly wages exceeded \$1,000. They were led by communications equipment manufacturing, SIC 366, with \$1,645

High Tech R&D Intensive Industries with 1998 Employment

SIC Code	Industry Description
282	Plastics materials and synthetics
283	Drugs
284	Soap, cleaners, and toilet goods
285	Paints and allied products
286*	Industrial organic chemicals
289	Miscellaneous chemical products
299*	Miscellaneous petroleum and coal products
335	Nonferrous rolling and drawing
355	Special industry machinery
357*	Computer and office equipment
362	Electrical industrial apparatus
366*	Communications equipment
367	Electronic components and accessories
371	Motor vehicles and equipment
372	Aircraft and parts
381*	Search and navigation equipment
382	Measuring and controlling devices
384	Medical instruments and supplies
386	Photographic equipment and supplies
737*	Computer and data processing services
871	Engineering and architectural services
873	Research and testing services
874*	Management and public relations
899*	Services, not elsewhere classified

* Industries with average weekly wages over \$1,000

per week. Three of the eight were not in manufacturing -

- Computer and data processing services, SIC 737, with \$1,246
- Services, not elsewhere classified, SIC 899, with \$1,159
- Management and public relations services, SIC 874, with \$1,121

Bruce Olinsky

Published by the Economic and
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Bureau

Employment
SECURITY

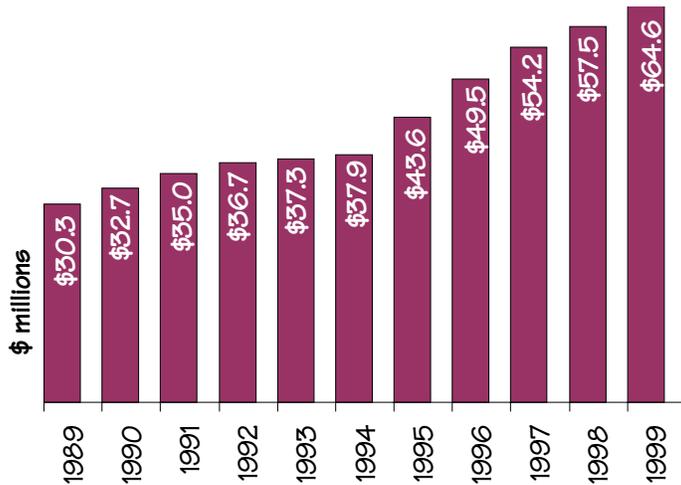
Lottery Sales in New Hampshire

The New Hampshire lottery is the oldest modern day legal lottery in the United States. Governor John King signed the sweepstakes bill in 1963 and the first tickets went on sale in March 1964. Only one type of ticket was sold at three dollars each in 1964. Today a variety of lotto-type games and numerous instant games are available. Lottery

sales have totaled more than \$1.8 billion since 1964. Annual sales have increased from \$5.7 million in fiscal year 1964 to more than \$202.4 million in fiscal year 1999.

New Hampshire's schools received an estimated \$64.6 million from the sale of lottery tickets in fiscal year 1999. According to the New Hampshire Sweepstakes Commission, about 32 cents from every New Hampshire lottery ticket sold goes back to the state in the form of aid for education. Schools in the state have received more than \$603 million from lottery sales since 1964.

Money Distributed to Schools from Lottery Sales Has Doubled in the Last Ten Years



Money Distributed to New Hampshire Schools from Sales of Lottery Tickets

So where does the rest of the money go? Cost of sales consumes about 66 cents of every dollar; about 54 cents goes to lottery winners and 12 cents goes to other cost of sales such as agent commissions, advertising, and vendor fees. The remaining two cents goes to operating expenses such as salaries, benefits, and ticket printing.

Elisabeth Picard

The Granite State's Lottery - Yearly Revenue

Fiscal Year	Revenue	Cost of Sales*		Operating Expenses**		Net for Education	
		Amount	% of Sales	Amount	% of Sales	Amount	% of Sales
1989	87,157,937	54,031,036	62.0%	2,777,834	3.2%	30,349,067	34.8%
1990	94,566,729	58,657,447	62.0%	3,230,862	3.4%	32,678,420	34.6%
1991	99,724,542	61,159,464	61.3%	3,536,252	3.5%	35,028,826	35.1%
1992	106,530,552	66,355,044	62.3%	3,433,901	3.2%	36,741,607	34.5%
1993	106,587,946	65,829,576	61.8%	3,468,241	3.3%	37,290,129	35.0%
1994	112,118,195	70,781,219	63.1%	3,474,590	3.1%	37,862,386	33.8%
1995	143,474,699	96,399,824	67.2%	3,432,261	2.4%	43,642,614	30.4%
1996	165,901,621	112,779,033	68.0%	3,581,957	2.2%	49,540,631	29.9%
1997	179,890,876	122,045,911	67.8%	3,638,180	2.0%	54,206,785	30.1%
1998	187,066,779	125,798,298	67.2%	3,763,294	2.0%	57,505,188	30.7%
1999	202,493,547	134,251,696	66.3%	3,662,857	1.8%	64,578,994	31.9%

Source: New Hampshire Sweepstakes Commission, <http://www.state.nh.us/lottery/yrlyrev.htm> [December 27, 1999]

* Cost of sales includes prizes paid and other cost of sales expenses such as agent commissions, advertising, and vendor fees.

** Operating expenses covers salaries, benefits, and ticket printing.

Unemployment Compensation Claims Activity

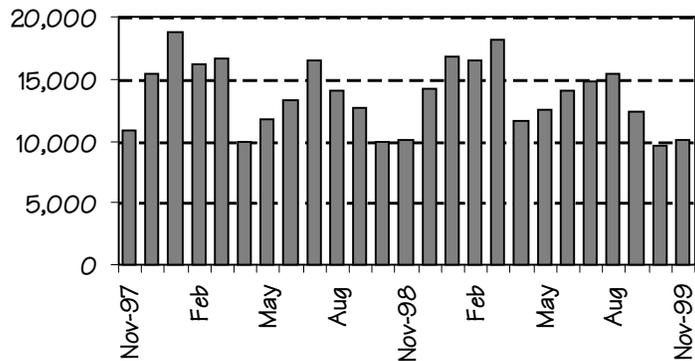
Total Regular Unemployment Compensation Programs:	Nov 1999	Oct 1999	Nov 1998	Change from Previous			
				Month		Year	
				Net	Percent	Net	Percent
Initial Claims	2,398	1,843	2,604	555	30.1%	(206)	-7.9%
Continued Weeks	10,104	9,614	10,133	490	5.1%	(29)	-0.3%

Claims Activity

Unemployment Compensation Fund, November 1999

Unemployment compensation fund balance at the end of November:	\$303,268,367.63
Average payment for a week of total unemployment:	\$219.08
Net benefits paid:	\$1,694,193.82
Net contributions received during the month:	\$2,560,269.01
Interest Received November 1999:	\$0.00
Interest Received October 1999:	\$0.00
Reed Act October 1999:	\$404,529.00

Trust Fund



Continued Weeks Claimed

Nov-97 through Nov-99

Continued Weeks Claimed Was Up Slightly

Nov-99	Oct-99	Nov-98	change from previous	
			Month	Year
168.3	168.2	164.0	0.1%	2.6%

United States
All Urban Areas (CPI-U)
(1982-1984=100)

Consumer Price Index

Vital Signs: Economic and Social Indicators for New Hampshire, 1995-1998, 65 pages, January 2000

Vital Signs is released

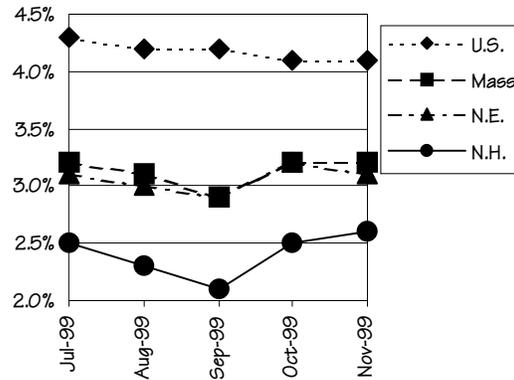
Vital Signs is a collection of economic and social indicators gathered from a wide variety of sources. It examines seventeen areas of the New Hampshire economy including health, population, employment, transportation, crime, education, social assistance, environment, and others. Each section contains a table with data comparing the four year time span of 1995 to 1998. Narrative and graphs discussing and illustrating trends, significant recent events and developments, legislation, and other activity, accompany each section.

This and other ELMI publications are available by calling (603) 228-4124; by accessing our Web site at <www.nhes.state.nh.us/lmpage.htm>; or by sending a request to:

ELMI Publications
New Hampshire Employment Security
32 South Main Street
Concord, NH 03301

N.H. and U.S. Seasonally Adjusted Unemployment Rate

New Hampshire and Vermont both recorded 2.6 percent unemployment to lead New England and the Northeast region.



Unemployment Rates by Region

	preliminary Nov-99	revised Oct-99	Nov-98
United States	4.1%	4.1%	4.4%
New England	3.1%	3.2%	3.3%
Connecticut	2.9%	3.0%	3.2%
Maine	3.5%	3.9%	4.0%
Massachusetts	3.2%	3.2%	3.1%
New Hampshire	2.6%	2.5%	2.9%
Rhode Island	3.8%	3.7%	4.4%
Vermont	2.6%	2.9%	3.1%
Northeast	4.2%	4.3%	4.5%
New Jersey	4.3%	4.5%	4.5%
New York	5.0%	5.2%	5.5%
Pennsylvania	4.3%	4.2%	4.5%

Labor Force Estimates

by Place of Residence

	Jul-99	Aug-99	Sep-99	revised Oct-99	preliminary Nov-99
New Hampshire					
Unemployment Rate	2.5%	2.3%	2.1%	2.5%	2.6%
Civilian Labor Force	671,300	669,650	667,350	671,340	673,790
Number Employed	654,680	654,000	653,140	654,550	656,050
Number Unemployed	16,620	15,650	14,210	16,790	17,740
United States (in thousands)					
Unemployment Rate	4.3%	4.2%	4.2%	4.1%	4.1%
Civilian Labor Force	139,254	139,264	139,386	139,662	139,827
Number Employed	133,307	133,411	133,550	133,896	134,085
Number Unemployed	5,947	5,853	5,836	5,766	5,743

Seasonally Adjusted Nonfarm Employment

By Place of Establishment

Industry	Jul-99	Aug-99	Sep-99	revised Oct-99	preliminary Nov-99
TOTAL ALL INDUSTRIES	598,100	600,200	600,400	596,800	602,200
Mining*	500	500	400	400	400
Construction	23,800	23,700	23,800	24,100	24,700
Manufacturing	106,200	106,100	106,200	106,000	105,900
Durable Goods	74,200	74,300	74,500	74,400	74,100
Nondurable Goods	32,000	31,800	31,700	31,600	31,800
Transportation and Public Utilities	21,400	21,700	21,500	21,900	21,700
Trade	154,800	155,900	156,300	156,100	157,600
Wholesale Trade	30,400	31,000	31,300	31,000	31,900
Retail Trade	124,400	124,900	125,000	124,800	125,700
Finance, Insurance, and Real Estate	31,500	31,900	31,800	31,900	31,800
Services	179,500	179,500	180,700	177,300	180,600
Government	80,400	80,900	79,700	79,100	80,100

* Since N.H. mining employment exhibits no clear seasonal pattern, these estimates are not adjusted.

Labor Force Estimates

New Hampshire	Nov-99	Oct-99	Nov-98
Number of Workers	preliminary	revised	
Total Civilian Labor Force	676,070	668,410	664,110
Employed	657,930	654,610	644,670
Unemployed	18,140	13,800	19,440
Unemployment Rate (% of labor force)	2.7%	2.1%	2.9%

Unemployment Rates by Area

	Nov-99	Oct-99	Nov-98
	preliminary	revised	

U.S. and Regional States

United States	3.8%	3.8%	4.1%
New England	2.9%	2.8%	3.0%
Connecticut	2.6%	2.7%	2.9%
Maine	3.6%	3.3%	4.2%
Massachusetts	2.8%	2.8%	2.7%
New Hampshire	2.7%	2.1%	2.9%
Rhode Island	3.4%	3.9%	3.9%
Vermont	2.5%	2.6%	2.9%
Northeast	4.0%	4.0%	4.2%
New Jersey	4.0%	4.2%	4.2%
New York	4.8%	4.9%	5.2%
Pennsylvania	4.0%	3.8%	4.2%

Labor Market Areas (NH Portions Only)

Berlin LMA	4.6%	2.5%	2.9%
Seabrook-South Hampton, NH Portion			
Boston MA-NH PMSA	4.6%	2.9%	8.9%
Claremont LMA	2.5%	2.0%	2.1%
Colebrook LMA	7.6%	1.7%	8.1%
Concord LMA	1.9%	1.5%	2.2%
Conway LMA	2.3%	1.7%	2.7%
NH Portion Hartford-Lebanon VT-NH LMA	1.1%	0.9%	1.2%
NH Portion Keene-Brattleboro NH-VT LMA	2.1%	1.8%	2.4%
Laconia LMA	2.4%	1.8%	2.5%
Lancaster LMA	4.6%	2.3%	4.7%
Salem-Derry, NH Portion Lawrence MA- NH PMSA	4.4%	3.6%	5.0%
Littleton LMA	3.7%	1.7%	4.4%
Pelham, NH Portion Lowell MA-NH PMSA	5.7%	4.2%	4.7%
Manchester LMA	2.3%	1.9%	2.6%
Nashua LMA	2.9%	2.4%	3.0%
Peterborough LMA	2.5%	1.9%	2.4%
Plymouth LMA	2.6%	1.4%	2.8%
NH Portion Portsmouth-Rochester, NH- ME PMSA	2.2%	1.7%	2.5%

Counties

Belknap	2.3%	1.8%	2.5%
Carroll	2.3%	1.7%	2.6%
Cheshire	2.3%	1.9%	2.6%
Coos	5.2%	2.4%	4.6%
Grafton	2.0%	1.2%	2.4%
Hillsborough	2.7%	2.2%	2.8%
Merrimack	2.0%	1.5%	2.1%
Rockingham	3.4%	2.7%	3.9%
Strafford	2.1%	1.6%	2.7%
Sullivan	2.6%	2.0%	2.1%

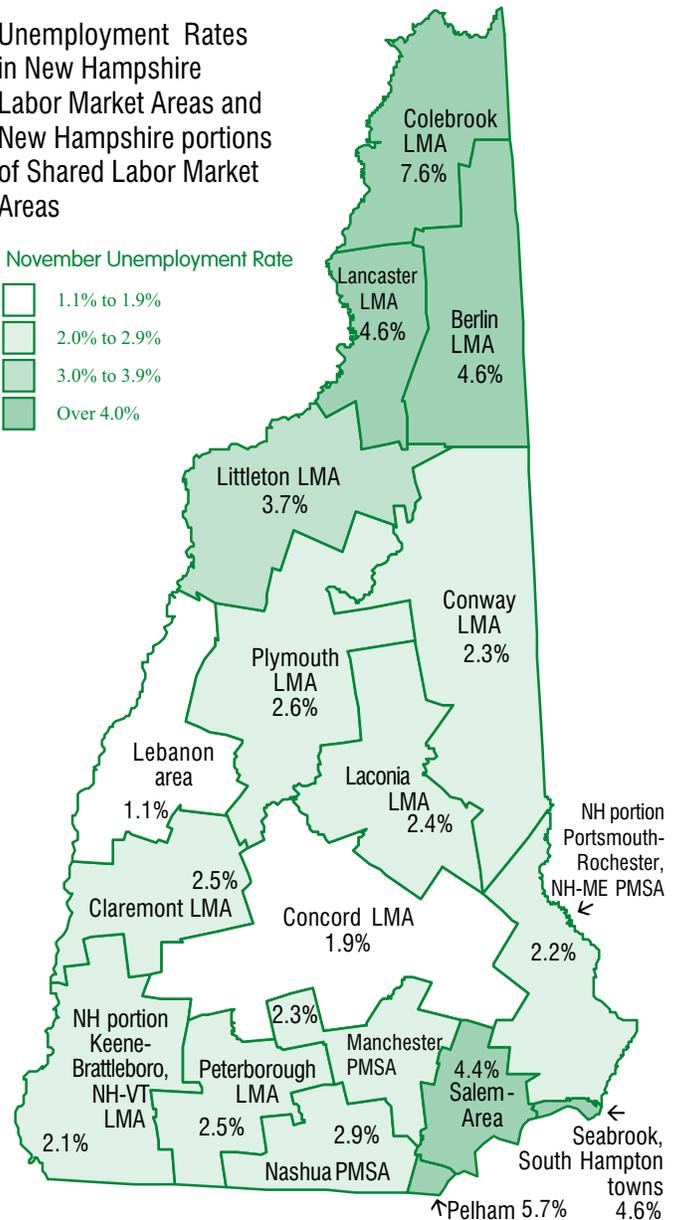
Local Area Unemployment Statistics (LAUS)

Not Seasonally
Adjusted

By Place of Residence

Unemployment Rates
in New Hampshire
Labor Market Areas and
New Hampshire portions
of Shared Labor Market
Areas

November Unemployment Rate



Gains in Retail trade and government led to an over-the-month gain in nonfarm employment statewide.

More detailed industry information is available at our Web site

Monthly Not Seasonally Adjusted New Hampshire Nonfarm Wage and Salary Employment

Current Employment Statistics Employment by Industry - Number of Jobs by place of establishment	Number of Jobs			Net Change	
	Nov-99 (preliminary)	Oct-99 (revised)	Nov-98	From Previous	
				Month	Year
Total All Industries	605,000	604,000	594,200	1,000	10,800
Private Employment Total	522,300	522,400	512,100	-100	10,200
Mining	400	400	500	0	-100
Construction	25,000	25,100	24,500	-100	500
Manufacturing	105,500	105,700	106,900	-200	-1,400
Durable Goods Total	73,900	74,000	74,800	-100	-900
Nondurable Goods Total	31,600	31,700	32,100	-100	-500
Transportation & Public Utilities	21,800	21,900	21,200	-100	600
Trade Total	158,800	157,500	155,100	1,300	3,700
Wholesale Trade	31,600	31,500	30,600	100	1,000
Retail Trade	127,200	126,000	124,500	1,200	2,700
Finance, Insurance, & Real Estate	31,600	31,700	31,300	-100	300
Services	179,500	180,300	172,700	-800	6,800
Government Total	82,700	81,600	82,100	1,100	600

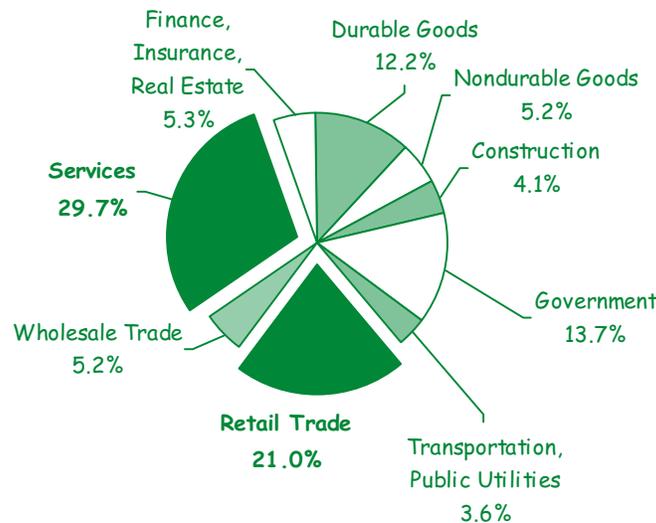
Note: Totals are rounded to hundreds

Most of the job gain statewide was localized in the Manchester PMSA. Like the state, the gains were in retail trade and government.

Current Employment Statistics (CES) Manchester PMSA

Employment by Industry Number of jobs by place of establishment	Number of Jobs			Change	
	Nov-99 (preliminary)	Oct-99 (revised)	Nov-98	from previous:	
				Month	Year
Total All Industries	103,400	101,900	102,300	1,500	1,100
Private Employment Total	91,300	90,200	90,900	1,100	400
Construction & Mining	4,800	4,700	4,700	100	100
Manufacturing	15,500	15,200	14,900	300	600
Durable Goods	10,200	9,900	9,800	300	400
Nondurable Goods	5,300	5,300	5,100	0	200
Transportation & Public Utilities	6,500	6,300	6,100	200	400
Trade Total	26,000	25,500	25,200	500	800
Wholesale Trade	7,000	7,000	6,900	0	100
Retail Trade	19,000	18,500	18,300	500	700
Finance, Insurance, & Real Estate	6,700	6,800	7,100	-100	-400
Services	31,800	31,700	32,900	100	-1,100
Government Total	12,100	11,700	11,400	400	700

Divisional Percentages of Nonfarm Employment



Current Employment Statistics Nashua PMSA

Employment by Industry Number of jobs by place of establishment	Number of Jobs			Change from previous:	
	Nov-99 (preliminary)	Oct-99 (revised)	Nov-98	Month	Year
	Total All Industries	93,200	93,300	94,200	-100
Private Employment Total	84,400	84,500	86,000	-100	-1,600
Construction & Mining	3,100	3,200	3,200	-100	-100
Manufacturing	26,900	27,000	27,400	-100	-500
Durable Goods	21,100	21,200	21,400	-100	-300
Nondurable Goods	5,800	5,800	6,000	0	-200
Transportation & Public Utilities	3,100	3,100	3,000	0	100
Trade Total	22,800	22,700	23,400	100	-600
Wholesale Trade	4,100	4,100	4,400	0	-300
Retail Trade	18,700	18,600	19,000	100	-300
Finance, Insurance, & Real Estate	5,100	5,000	5,300	100	-200
Services	23,400	23,500	23,700	-100	-300
Government Total	8,800	8,800	8,200	0	600

The Nashua PMSA experienced only minor over-the-month changes in all industries.

Current Employment Statistics Portsmouth-Rochester, NH-ME PMSA

Employment by Industry Number of jobs by place of establishment	Number of Jobs			Change from previous:	
	Nov-99 (preliminary)	Oct-99 (revised)	Nov-98	Month	Year
	Total All Industries	119,500	119,900	118,800	-400
Private Employment Total	97,000	97,400	96,500	-400	500
Construction & Mining	4,200	4,100	4,100	100	100
Manufacturing	18,500	18,500	18,600	0	-100
Durable Goods	11,100	11,100	11,200	0	-100
Nondurable Goods	7,400	7,400	7,400	0	0
Transportation & Public Utilities	4,000	4,100	3,800	-100	200
Trade Total	32,400	32,200	31,500	200	900
Wholesale Trade	5,400	5,300	5,300	100	100
Retail Trade	27,000	26,900	26,200	100	800
Finance, Insurance, & Real Estate	6,700	6,800	6,600	-100	100
Services	31,200	31,700	31,900	-500	-700
Government Total	22,500	22,500	22,300	0	200

Much of the statewide loss of jobs in the Services division was attributable to the Portsmouth-Rochester PMSA.

Average Earnings and Hours of Production Workers in Manufacturing

Industry	Average Weekly Earnings			Average Weekly Hours			Average Hourly Earnings		
	Nov-99 (prelim.)	Oct-99 (revised)	Nov-98	Nov-99 (prelim.)	Oct-99 (revised)	Nov-98	Nov-99 (prelim.)	Oct-99 (revised)	Nov-98
NEW HAMPSHIRE									
All Manufacturing	\$536.73	\$526.32	\$533.23	40.6	40.3	41.4	\$13.22	\$13.06	\$12.88
Durable Goods	537.43	528.93	528.55	40.9	40.5	41.1	13.14	13.06	12.86
Nondurable Goods	533.86	521.60	543.93	39.9	40.0	42.1	13.38	13.04	12.92
MANCHESTER PMSA									
All Manufacturing	\$573.39	\$543.59	\$561.37	39.3	38.8	41.8	\$14.59	\$14.01	\$13.43
Durable Goods	558.16	536.66	557.51	38.6	37.9	42.3	14.46	14.16	13.18
Nondurable Goods	603.58	557.28	570.31	40.7	40.5	41.0	14.83	13.76	13.91
NASHUA PMSA									
All Manufacturing	\$567.01	\$568.48	\$633.36	41.6	41.8	42.0	\$13.63	\$13.60	\$15.08
Durable Goods	557.40	555.30	595.91	42.1	42.1	40.9	13.24	13.19	14.57
Nondurable Goods	602.60	611.72	758.45	40.2	40.7	45.8	14.99	15.03	16.56
PORTSMOUTH-ROCHESTER, NH-MA PMSA									
All Manufacturing	\$543.10	\$526.22	\$490.44	41.3	40.2	40.2	\$13.15	\$13.09	\$12.20
Durable Goods	613.99	597.55	521.30	43.7	42.5	40.6	14.05	14.06	12.84
Nondurable Goods	433.90	416.87	445.10	37.6	36.6	39.6	11.54	11.39	11.24

Despite having an average weekly hours rate below the other two PMSAs and the state, the Manchester PMSA led them all in average weekly earnings for all manufacturing.

For Additional Information



<p>New Hampshire Employment Security Economic and Labor Market Information Bureau:</p> <p>General Information 228-4124 Research Unit 228-4173 Economist 228-4122 Covered Employment and Wages (ES-202) 228-4177 Current Employment Statistics (790) 228-4127 Local Area Unemployment Statistics 228-4175 Mass Layoff Statistics (MLS) 228-4175 Occupational Employment Statistics 228-4120 TDD Access: Relay NH 1 800 735-2964</p> <p>Internet address: www.nhes.state.nh.us</p> <p>US Department of Labor Boston Regional Office: Bureau of Labor Statistics Information (617) 565-2327</p>	<p>New Hampshire Employment Security Local Offices:</p> <p>Berlin 752-5500 Claremont 543-3111 Concord 228-4100 Conway 447-5924 Dover 742-3600 Keene 352-1904 Laconia 524-3960 Lebanon 448-6340 Littleton 444-2971 Manchester 627-7841 Nashua 882-5177 Portsmouth 436-3702 Salem 893-9185</p>
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OFFICIAL BUSINESS

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