

# New Hampshire Economic Conditions

June 2013

## Summer Hiring Patterns in New Hampshire

Employment in New Hampshire expands by roughly four percent, about 23,000 jobs, between April and July each year, according to a survey of New Hampshire employers that measures nonfarm payroll employment each month. These employment swings are primarily attributed to summer hiring, which is most prevalent in four private industry sectors: *Construction*, *Accommodation and food services*, *Arts, entertainment and recreation*, and *Retail trade*. With the exception of *Retail trade*, employment numbers in the remaining three industries peak in July each year.

Among these four industries, the largest percent change occurs in the *Arts, entertainment and recreation* sector each summer. From April to July, as seasonal businesses open and hire staff in anticipation of summer visitors, employment increases by about 50 percent, representing between 4,500 and 5,000 workers. The largest numeric increase, and

second largest percent change, is in the *Accommodation and food services* sector, where employment increases by more than 10,000 from April to July annually, roughly a 20 percent increase.

While *Construction* jobs aren't tied to tourism, these jobs are commonly dependent on summer weather conditions. *Construction* experiences a recurring increase of around seven percent during the spring months each year, about 2,000 jobs.

The summer season does foster an employment increase in *Retail trade*, although the Christmas holiday season is typically this industry's peak employment season. Increases in *Retail trade* generally account for about 2,500 workers, a four percent increase.

These data represent some of the expected employment changes

experienced in New Hampshire on an annual basis. Seasonal employment patterns are clearly illustrated when looking at monthly employment totals over time. The shaded areas in the graph below show employment increases from April to July each year, though the volume of growth was somewhat stunted during the most recent recession.

### Hires: New Hires vs. Recall Hires

Another measure of employment is the Local Employment Dynamics (LED), produced quarterly by the U.S. Census Bureau.<sup>1</sup> One employment measure available through LED is *all hires*, an estimated number of workers who

<sup>1</sup> Local Employment Dynamics (LED) Longitudinal Employer-Household Dynamics. United States Census. <http://lehd.ces.census.gov/>. The Quarterly Workforce Indicators (QWI) are a set of economic indicators—including employment, job creation, wages, and worker turnover

## Contents

### Seasonally Adjusted Estimates

Unemployment Rates. . . . . 4

Current Employment Statistics. . . . . 4

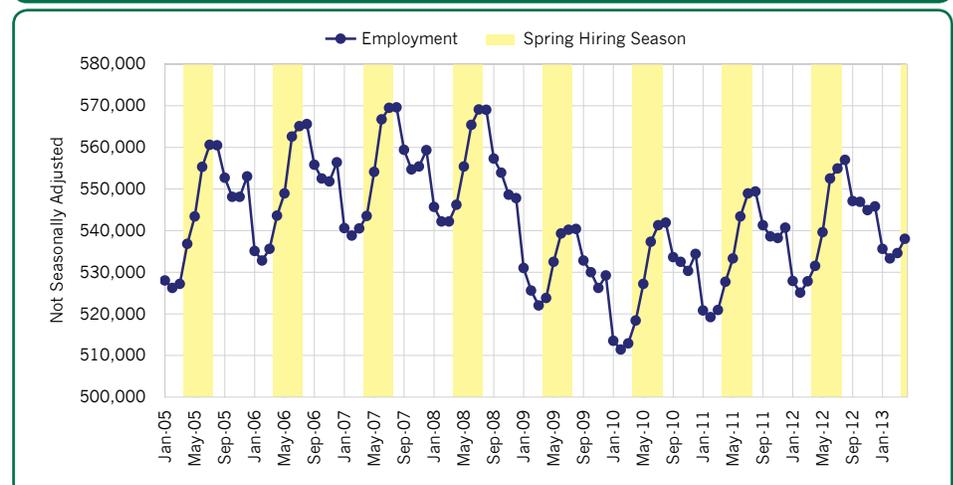
### Not Seasonally Adjusted Estimates

Unemployment Rates. . . . . 5

Current Employment Statistics. . . . . 6

Claims Activity . . . . . 9

## Total Private Employment (Current Employment Statistics)



started a new job in a specific quarter. *All hires* represent the total of *new hires* plus *recall hires*. *New hires* is a count of workers who started a new job in a given quarter, but had not worked for that employer in any of the previous four quarters. *Recall hires* is a count of workers who started a job in a given quarter with an employer they had worked for sometime in the previous year, with the exception of the previous quarter. These data provide an additional perspective on the dynamics of employment change.

During the second quarter (April, May, and June) of 2012, 14.6 percent of hires among all industries statewide were recall hires, meaning that about one of every seven had worked for the same employer sometime during the previous year (but not the previous quarter).

In New Hampshire, the industries with the largest number of second quarter hires are *Construction*, *Accommodation and food services*, *Arts, entertainment and recreation*, and *Retail trade*. Only *Retail trade* had a smaller share of second quarter recall hires (12.4 percent) than that of all industries. About one of every eight workers hired in *Retail trade* during the second quarter had worked for the same employer sometime during the previous year (but not the previous quarter).

Larger shares of recall hires were found in New Hampshire's typical summer season industries. One of every three workers (33.2 percent) hired in the *Arts, entertainment and recreation* sector was a recall hire, and one of every four hires (24.4 percent) in *Construction* was

### New Hires and Recall Hires in New Hampshire, 2Q 2012



Source: Local Employment Dynamics, U.S. Census Bureau

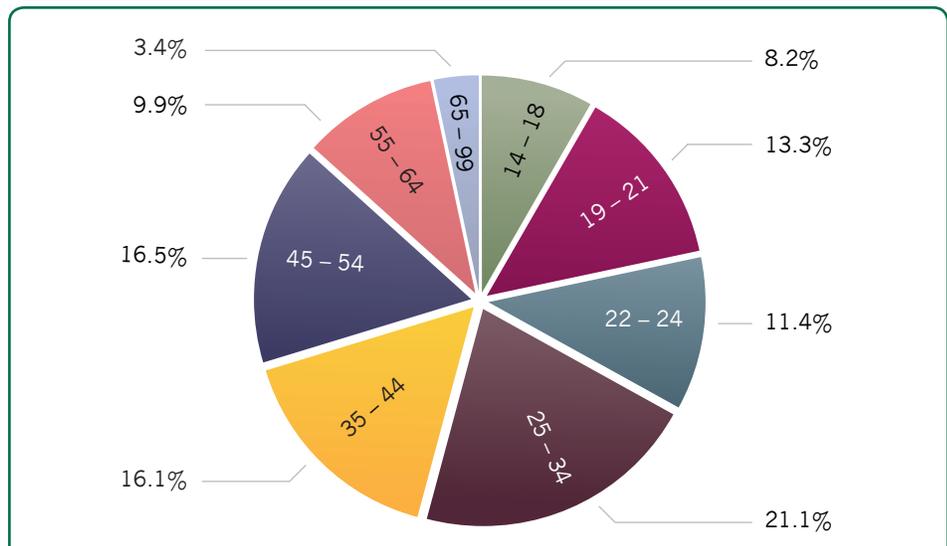
a recall hire. Nearly one of every five hires (18.7 percent) in the *Accommodation and food services* sector was a recall hire.

### Second Quarter 2012 Hires by Age

Comparing the share of all hires statewide during the second quarter of 2012, those age 14 to 18 and 19 to 21 years together represented

21.5 percent of hires. Additionally, those age 22 to 24 years held more than 11 percent of hires. When combined with the two younger age groups, the resulting cohort accounted for roughly 33 percent of hires, the largest share among age groups similar in span of years. Those 25 to 34 years of age represented 21.1 percent of hires, the next largest among the cohorts.

### All Hires by Age Group in New Hampshire, 2Q 2012

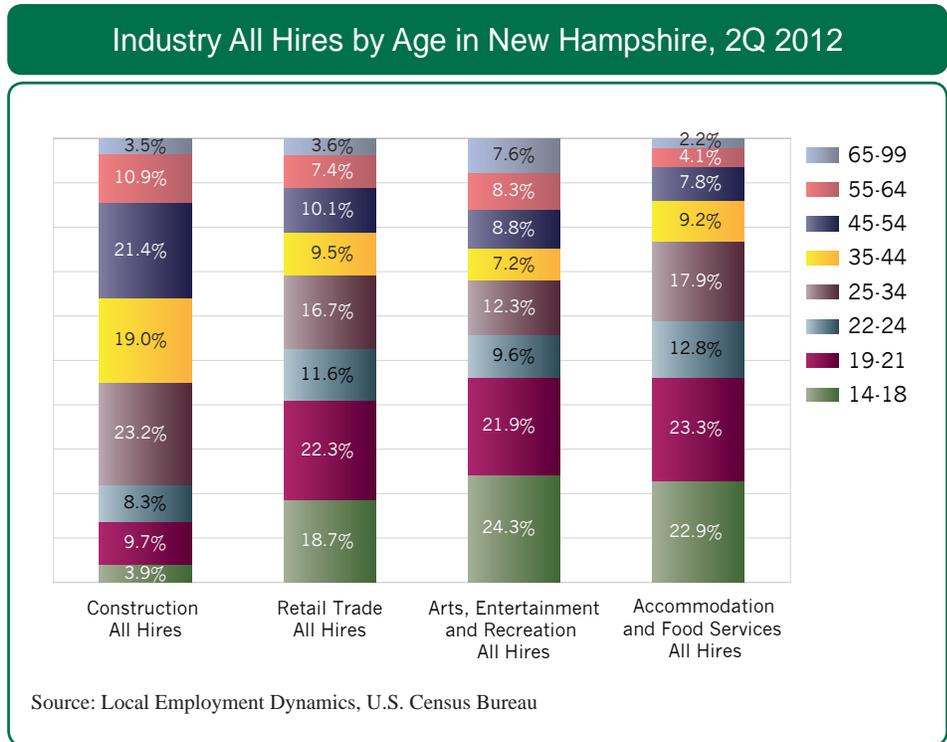


Source: Local Employment Dynamics, U.S. Census Bureau

Among the industries in New Hampshire most likely to hire for the summer season, there is a strong relationship with the younger age cohorts. Slightly under half of second quarter 2012 hires in the *Retail trade, Arts, entertainment, and recreation, and Accommodation and food service* industry sectors were either 14 to 18 years or 19 to 21 years. Second quarter hires of those in the 14 to 21 age range are typically high school and college students who work during summer break.

*Construction's* hiring patterns among all age cohorts was more similar to that of statewide all industries than to other industries that hire for the summer. Although this industry also has usual seasonal hiring, the age distribution of hires may be indicative of the unsuitability of some construction work for those in the youngest age groups. New Hampshire labor law prohibits those under 16 years of age from working in dangerous construction occupations. The age distribution of hires may also indicate that the *Construction* industry has a longer seasonal period than those industries that commonly hire students who must return to school in the fall.

Anita Josten



## Seasonally Adjusted Estimates

### Unemployment Estimates by Region

Seasonally Adjusted	Apr-13	Mar-13	Apr-12
United States	7.5%	7.6%	8.1%
Northeast	7.6%	7.9%	8.1%
New England	6.8%	6.9%	7.2%
Connecticut	8.0%	8.0%	8.2%
Maine	6.9%	7.1%	7.3%
Massachusetts	6.4%	6.4%	6.6%
New Hampshire	5.5%	5.7%	5.4%
Rhode Island	8.8%	9.1%	10.6%
Vermont	4.0%	4.1%	4.9%
Mid Atlantic	7.9%	8.3%	8.5%
New Jersey	8.7%	9.0%	9.4%
New York	7.8%	8.2%	8.6%
Pennsylvania	7.6%	7.9%	7.8%

### Local Area Unemployment Statistics (LAUS) by Place of Residence

New Hampshire	Nov-12	Dec-12	Jan-13	Feb-13	Mar-13	Apr-13
Unemployment Rate	5.7%	5.7%	5.8%	5.8%	5.7%	5.5%
Civilian Labor Force	744,130	744,730	745,610	744,970	744,620	744,110
Number Employed	701,960	702,530	702,320	701,930	701,920	703,100
Number Unemployed	42,170	42,200	43,290	43,040	42,700	41,010
<b>United States (in thousands)</b>						
Unemployment Rate	7.8%	7.8%	7.9%	7.7%	7.6%	7.5%
Civilian Labor Force	155,319	155,511	155,654	155,524	155,028	155,238
Number Employed	143,277	143,305	143,322	143,492	143,286	143,579
Number Unemployed	12,042	12,206	12,332	12,032	11,742	11,659

### Current Employment Statistics (CES) by Place of Establishment

Sector	Number of Jobs			Change from Previous	
	Apr-13	Mar-13	Apr-12	Month	Year
Total Nonfarm	638,400	638,800	632,300	-400	6,100
Total Private	547,700	547,800	540,800	-100	6,900
Mining and Logging	900	900	1,000	0	-100
Construction	23,000	23,000	22,700	0	300
Manufacturing	65,100	65,600	66,200	-500	-1,100
Durable Goods	49,500	49,700	50,400	-200	-900
Non-Durable Goods	15,600	15,900	15,800	-300	-200
Trade, Transportation, and Utilities	136,600	135,300	135,500	1,300	1,100
Wholesale Trade	26,900	26,800	26,600	100	300
Retail Trade	95,700	94,300	94,200	1,400	1,500
Transportation, Warehousing, and Utilities	14,000	14,200	14,700	-200	-700
Information	11,900	11,900	12,000	0	-100
Financial Activities	35,600	36,000	34,600	-400	1,000
Professional and Business Services	70,900	69,900	67,600	1,000	3,300
Professional, Scientific, and Technical	30,200	29,400	30,100	800	100
Administrative and Support	32,500	32,600	29,500	-100	3,000
Education and Health Services	116,300	117,100	113,900	-800	2,400
Educational Services	29,500	29,900	28,400	-400	1,100
Health Care and Social Assistance	86,800	87,200	85,500	-400	1,300
Leisure and Hospitality	64,900	65,300	64,400	-400	500
Arts, Entertainment, and Recreation	10,900	11,500	11,200	-600	-300
Accommodation and Food Services	54,000	53,800	53,200	200	800
Other Services	22,500	22,800	22,900	-300	-400
Government	90,700	91,000	91,500	-300	-800
Federal Government	7,100	7,300	7,400	-200	-300
State Government	24,400	24,500	24,400	-100	0
Local Government	59,200	59,200	59,700	0	-500

Current month  
is preliminary;  
past months  
are revised

Prior data and area data are available on our Web site at [www.nhes.nh.gov/elmi/statistics/ces-data.htm](http://www.nhes.nh.gov/elmi/statistics/ces-data.htm)

## Not Seasonally Adjusted Estimates by Place of Residence

### Labor Force Estimates

New Hampshire	Apr-13	Mar-13	Apr-12
Total Civilian Labor Force	736,560	742,120	734,720
Employed	698,050	697,610	696,830
Unemployed	38,510	44,510	37,890
Unemployment Rate	5.2%	6.0%	5.2%

United States (# in thousands)	Apr-13	Mar-13	Apr-12
Total Civilian Labor Force	154,739	154,512	153,905
Employed	143,724	142,698	141,995
Unemployed	11,014	11,815	11,910
Unemployment Rate	7.1%	7.6%	7.7%

### Unemployment Rates by Area

Counties	Apr-13	Mar-13	Apr-12
Belknap	5.3%	6.3%	5.1%
Carroll	5.5%	6.3%	5.6%
Cheshire	4.8%	5.9%	4.8%
Coos	7.6%	7.9%	8.9%
Grafton	4.3%	4.8%	4.2%
Hillsborough	5.3%	6.1%	5.2%
Merrimack	4.6%	5.7%	4.5%
Rockingham	5.7%	6.3%	5.6%
Strafford	4.9%	5.9%	5.0%
Sullivan	4.5%	5.2%	4.4%

Map Key	Labor Market Areas	Apr-13	Mar-13	Apr-12
1	Colebrook NH-VT LMA, NH Portion	10.7%	8.8%	10.9%
2	Berlin NH MicroNECTA	7.8%	8.6%	9.8%
3	Littleton NH-VT LMA, NH Portion	5.3%	5.7%	6.0%
4	Haverhill NH LMA	5.7%	6.6%	5.3%
5	Conway NH-ME LMA, NH Portion	6.1%	6.4%	6.5%
6	Plymouth NH LMA	5.1%	5.9%	5.2%
7	Moultonborough NH LMA	4.1%	5.5%	3.9%
8	Lebanon NH-VT MicroNECTA, NH Portion	3.5%	3.9%	3.2%
9	Laconia NH MicroNECTA	5.5%	6.6%	5.3%
10	Wolfeboro NH LMA	4.5%	5.9%	4.4%
11	Franklin NH MicroNECTA	5.1%	6.7%	4.9%
12	Claremont NH MicroNECTA	4.3%	5.1%	4.2%
13	Newport NH LMA	5.5%	6.3%	5.3%
14	New London NH LMA	4.2%	5.1%	4.0%
15	Concord NH MicroNECTA	4.5%	5.6%	4.4%
16	Rochester-Dover NH-ME MetroNECTA, NH Portion	4.9%	5.9%	5.0%
17	Charlestown NH LMA	4.9%	5.9%	4.3%
18	Hillsborough NH LMA	5.4%	5.9%	5.4%
19	Manchester NH MetroNECTA	4.9%	5.8%	5.0%
20	Keene NH MicroNECTA	4.4%	5.5%	4.4%
21	Peterborough NH LMA	5.4%	6.4%	5.3%
22	Nashua NH-MA NECTA Division, NH Portion	5.5%	6.2%	5.2%
23	Exeter Area, NH Portion, Haverhill-N. Andover-Amesbury MA-NH NECTA Division	6.3%	6.6%	6.4%
24	Portsmouth NH-ME MetroNECTA, NH Portion	4.7%	5.4%	4.5%
25	Hinsdale Town, NH Portion, Brattleboro VT-NH LMA	7.4%	6.8%	6.4%
26	Pelham Town, NH Portion, Lowell-Billerica-Chelmsford MA-NH NECTA Division	7.4%	7.2%	7.0%
27	Salem Town, NH Portion, Lawrence-Methuen-Salem MA-NH NECTA Division	8.1%	8.0%	8.0%

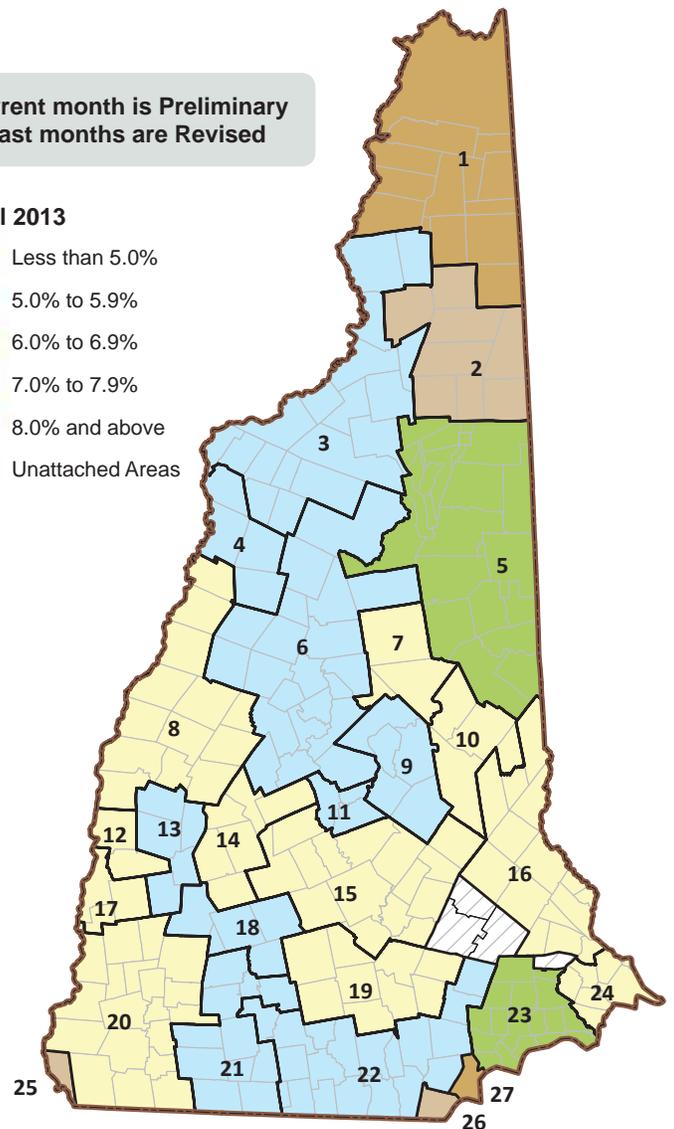
### Unemployment Rates by Region

Not Seasonally Adjusted	Apr-13	Mar-13	Apr-12
United States	7.1%	7.6%	7.7%
Northeast	7.3%	7.9%	7.7%
New England	6.8%	7.2%	6.9%
Connecticut	7.8%	8.2%	7.8%
Maine	7.1%	7.6%	7.4%
Massachusetts	6.3%	6.8%	6.3%
New Hampshire	5.2%	6.0%	5.2%
Rhode Island	8.7%	9.5%	10.4%
Vermont	4.6%	4.6%	5.1%
Mid Atlantic	7.5%	8.2%	8.1%
New Jersey	8.4%	9.0%	9.1%
New York	7.3%	8.0%	8.1%
Pennsylvania	7.2%	7.8%	7.2%

Current month is Preliminary  
Past months are Revised

#### April 2013

- Less than 5.0%
- 5.0% to 5.9%
- 6.0% to 6.9%
- 7.0% to 7.9%
- 8.0% and above
- Unattached Areas



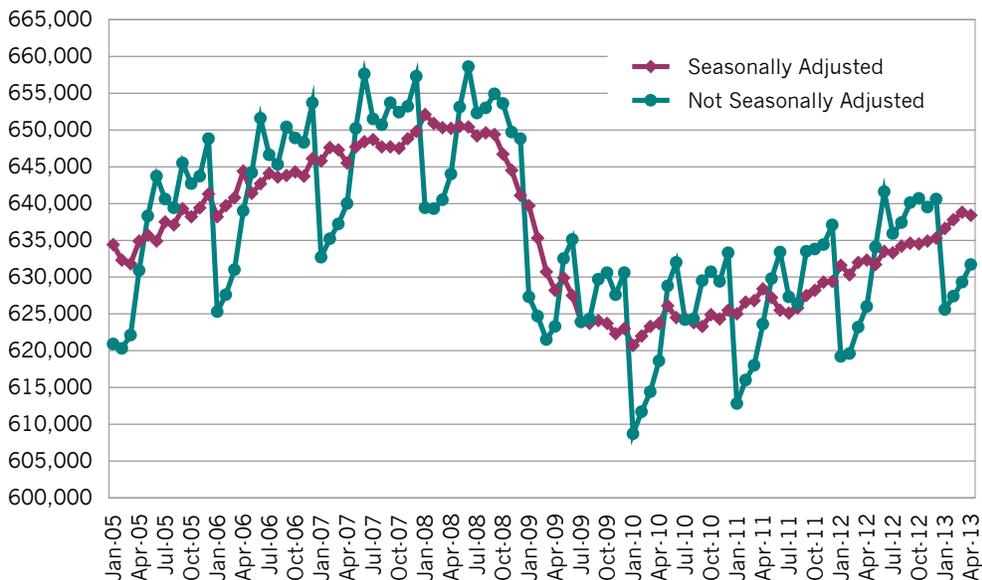
New Hampshire unemployment and labor force estimates are calculated using a regression model which depends on Current Population Survey (CPS) estimates. Labor Market Area estimates are calculated using the Bureau of Labor Statistics "Handbook Method" and then adjusted to the State levels.

## Monthly Analysis of Current Employment Statistics (CES)

### New Hampshire Nonfarm Employment Statewide Not Seasonally Adjusted

	Number of Jobs			Change from previous:	
	Apr-13 preliminary	Mar-13 revised	Apr-12	Month	Year
Total All Supersectors	631,700	629,300	626,000	2,400	5,700
Private Employment Total	538,000	534,600	531,500	3,400	6,500
Mining and Logging	800	800	900	0	-100
Construction	22,100	20,400	21,800	1,700	300
Manufacturing	64,800	65,000	65,800	-200	-1,000
Durable Goods	49,400	49,500	50,100	-100	-700
Non-Durable Goods	15,400	15,500	15,700	-100	-300
Trade, Transportation and Utilities	133,000	131,400	132,600	1,600	400
Wholesale Trade	26,500	26,400	26,500	100	0
Retail Trade	92,800	91,200	91,600	1,600	1,200
Transportation and Utilities	13,700	13,800	14,500	-100	-800
Information	11,800	11,800	12,000	0	-200
Financial Activities	35,500	35,700	34,300	-200	1,200
Professional and Business	70,500	68,700	67,800	1,800	2,700
Education and Health	117,300	117,900	114,400	-600	2,900
Leisure and Hospitality	59,900	60,800	59,300	-900	600
Other Services	22,300	22,100	22,600	200	-300
Government Total	93,700	94,700	94,500	-1,000	-800
Federal Government	7,200	7,200	7,400	0	-200
State Government	25,700	26,000	25,500	-300	200
Local Government	60,800	61,500	61,600	-700	-800

### Total Nonfarm Employment Trend for April 2013

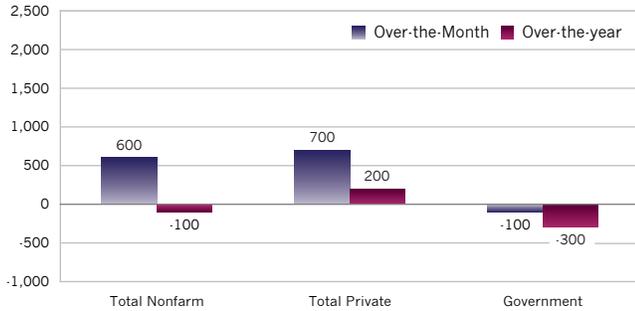


## Not Seasonally Adjusted Estimates by Place of Establishment

### Nonfarm Employment by Metropolitan Statistical Areas

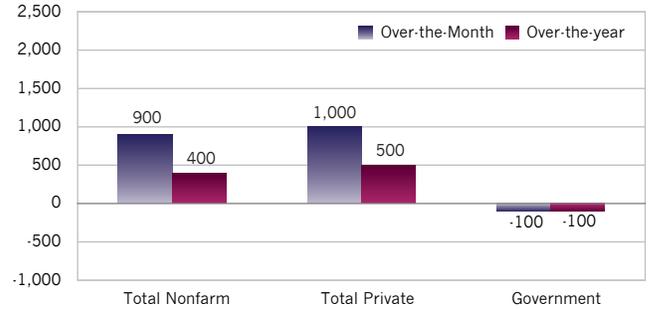
**Manchester Metro NECTA**

April 2013



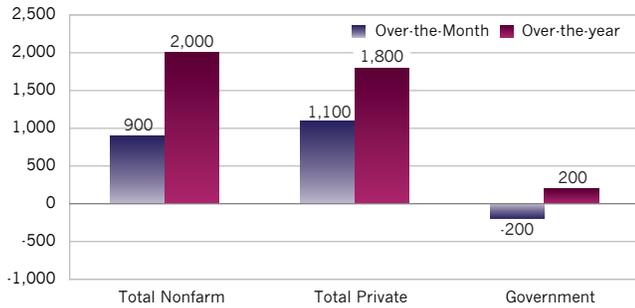
**Nashua NH-MA NECTA Division**

April 2013



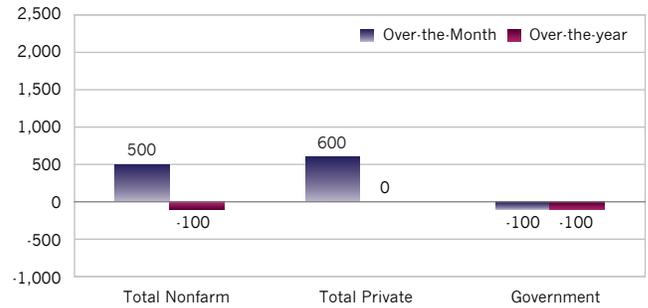
**Portsmouth NH-ME NECTA**

April 2013



**Rochester-Dover NH-ME NECTA**

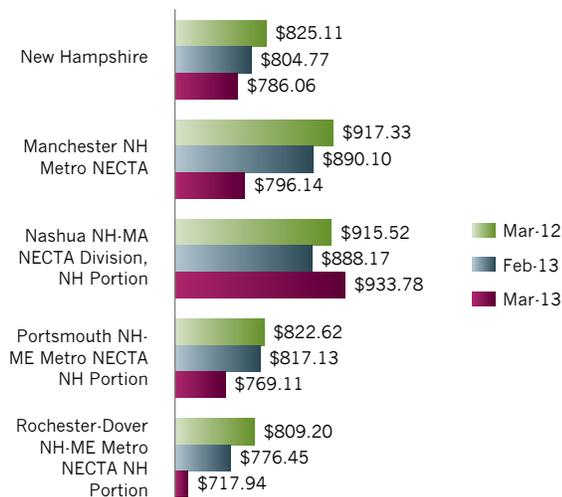
April 2013



### Average Weekly Earnings Data

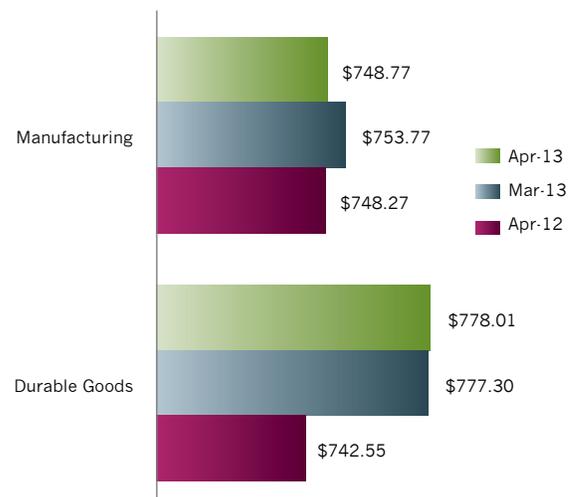
**All Employees Average Weekly Earnings**

April 2013



**Production Workers Average Weekly Earnings**

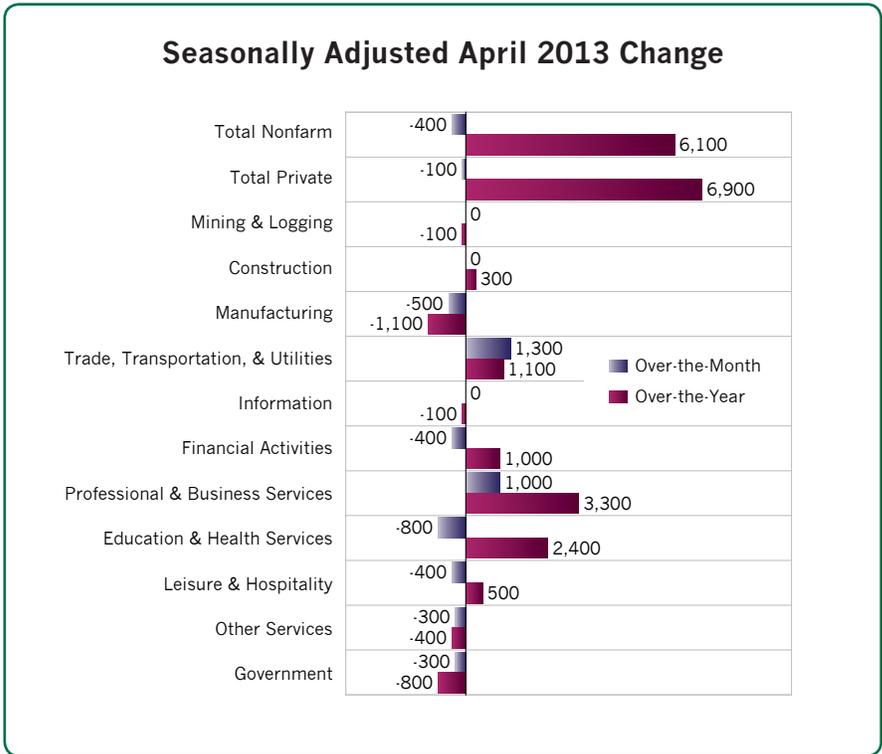
April 2013



Sector data for the four areas and hours and earnings data are available on our web site: [www.nhes.nh.gov/elmi/statistics/ces-data.htm](http://www.nhes.nh.gov/elmi/statistics/ces-data.htm)

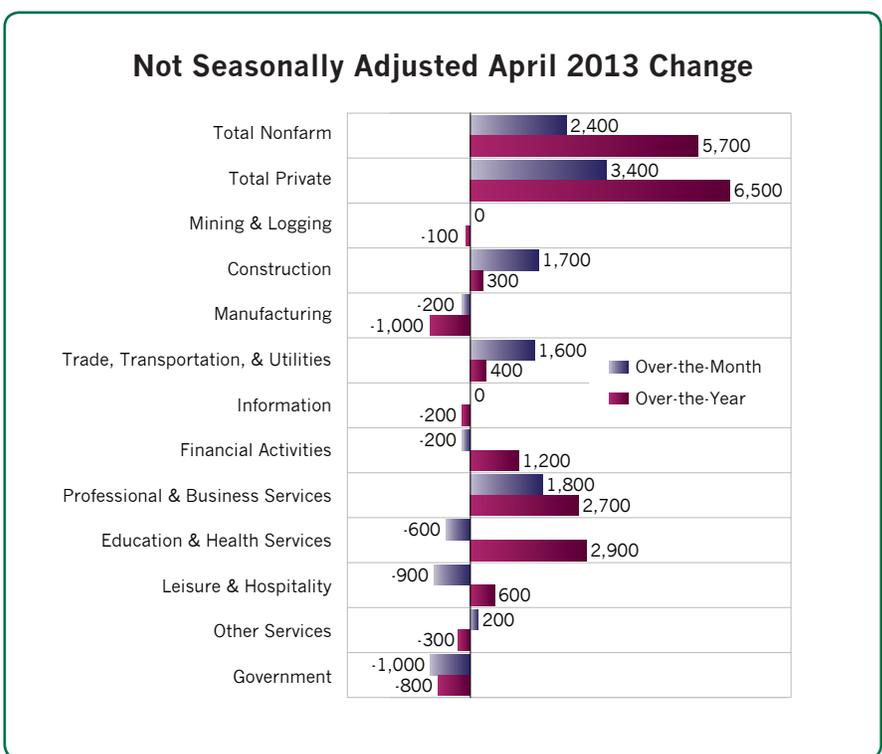
## Seasonally Adjusted Statistical Analysis of Nonfarm Employment

- Seasonally adjusted nonfarm employment decreased by 400 jobs between March and April. Both the private sector and the government sector saw losses over-the-month.
- Trade, transportation, and utilities and professional and business services added 1,300 and 1,000 jobs, respectively, from March to April. These were the only two supersectors to add employment over-the-month.
- Total nonfarm increased by 6,100 jobs between April 2012 and April 2103. All of the employment gain was in the private sector, up 6,900 jobs, while the government sector lost 800 jobs.
- Ninety-four percent of the over-the-year nonfarm growth was in professional and business services and private education and health services.



## Not Seasonally Adjusted Statistical Analysis of Nonfarm Employment

- New Hampshire's not seasonally adjusted employment increased by 2,400 jobs between March and April. All of this growth was in the private sector.
- Professional and business services, construction, and trade, transportation, and utilities contributed over 1,500 jobs each, over-the-month.
- Over-the-year, not seasonally adjusted nonfarm employment expanded by 5,700 jobs. All of this growth was in the private sector.
- Over-the-year, 86 percent of private job growth was in two supersectors, private education and health services and professional and business services.



For further analysis, see the *Detailed Monthly Analysis of Industry Employment Data* on our web site: [www.nhes.nh.gov/elmi/statistics/ces-data.htm](http://www.nhes.nh.gov/elmi/statistics/ces-data.htm)

### Unemployment Compensation Claims Activity

	Nov-12	Dec-12	Jan-13	Feb-13	Mar-13	Apr-13
<b>Initial Claims</b>	5,613	7,368	7,135	5,159	4,419	5,111
<b>Continued Weeks Claimed</b>	33,389	45,784	48,356	45,419	49,210	40,311

### Consumer Price Index

United States, All Urban Consumers, Not Seasonally Adjusted (CPI-U) (1982-1984=100)				
Apr-13	Mar-13	Apr-12	Change from Previous	
			Month	Year
232.531	232.773	230.085	-0.1%	1.1%

#### NH Employment Security Economic and Labor Market Information Bureau

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