

New Hampshire's Labor Market in Review

2017 Economic Analysis Report



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2017 Economic Analysis Report



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The Federal Reserve raised the interest rate in mid-June for the second time in 2017 despite a below-expectations inflation rate, but referencing a strong labor market overall with a falling unemployment rate and projected GDP growth at 2.2 percent.

New Hampshire's economy is showing strength as well. From 2015 to 2016, GDP in New Hampshire increased by 3.0 percent, the fastest among the states in New England.

The unemployment rate was 2.9 percent in May 2017 and has been below 3.0 percent for over a year. This has raised concerns among businesses regarding where additional workers are going to come from. The low unemployment rate is a reversal of the labor market trend from a couple of years ago, where there were many unemployed persons and few openings available. Now employers are feeling confident and ready to expand their businesses¹ but are increasingly finding it harder to find workers. In certain health care industries, such as long term care facilities, a labor shortage has led the New Hampshire Legislature to pass bills trying to ease the regulatory licensing burden at entry for hiring.² The condition of the current labor market in New Hampshire requires employers to "think outside the box" to find ways to attract and hire additional labor.

The Employment Situation in New Hampshire – A tight labor market

The New Hampshire labor market has steadily been improving since the beginning of 2010. Nonfarm jobs have grown from 621,200 in January 2010 to 674,700 in April 2017, a gain of 53,500 jobs. Resident employment has similarly grown over the period, with about 37,500 more residents holding jobs. In this recovery period, nonfarm jobs have been growing at a faster rate than resident employment.³ On the other hand, during the prior downturn, nonfarm jobs declined faster than resident employment. Currently, the two time series are closer together than prior to the Great Recession. As an economic measurement of labor market conditions, the nonfarm jobs count is considered the primary indicator, so its current strength in New Hampshire is a positive sign. Faster growth in nonfarm jobs relative to resident employment might indicate that an increased number of workers hold multiple jobs or more out-of-state residents commute into New Hampshire for work.

The labor force has followed a somewhat different pattern. Yet, over the period January 2010 to May 2017, the labor force has increased by about 13,000 residents. The difference between the civilian labor force and resident employment equals the number of New Hampshire residents that are unemployed. The level of unemployment has diminished from about 46,400 in January 2010 to 21,920 in May 2017. When the resident employment level grows closer to total labor

¹ According to the Granite State Poll released May 23, 2017, "Confidence in the New Hampshire economy remains near record highs." The BIA Report on Consumer Confidence. The University of New Hampshire Survey Center, accessed on June 15, 2017 at:

http://cola.unh.edu/sites/cola.unh.edu/files/research_publications/gsp2017_spring_ccon052317.pdf

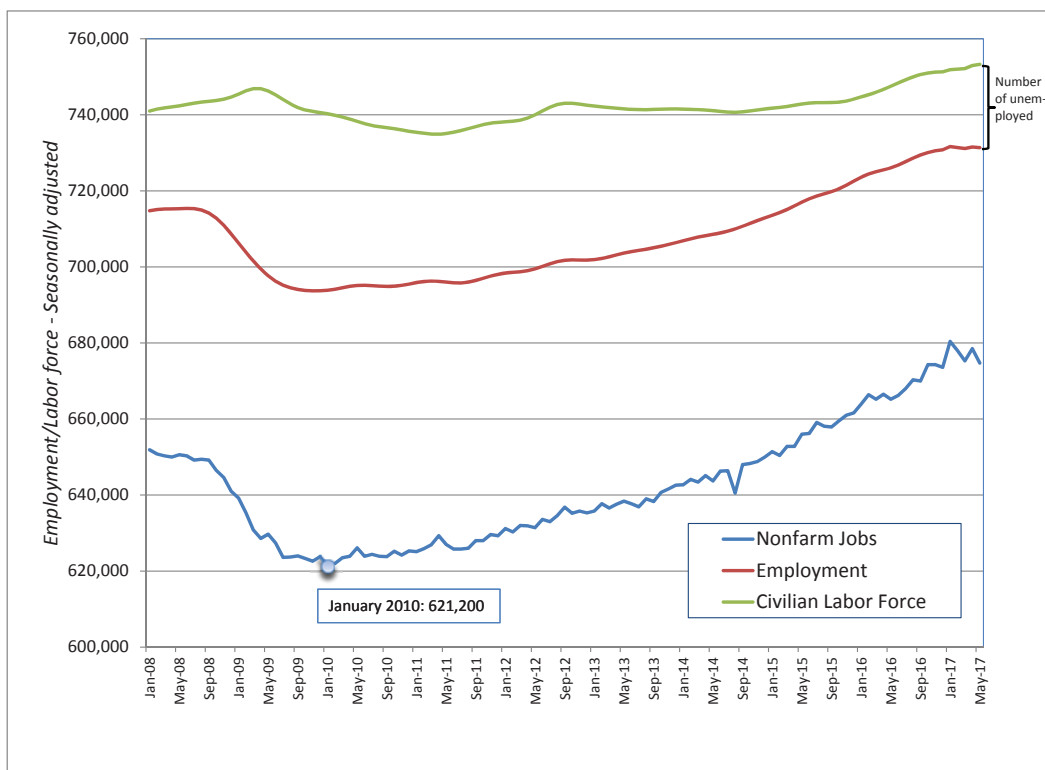
² DeWitt, Ethan. "Bills to address New Hampshire nursing shortage clear State House." June 13, 2017. The Keene Sentinel. Accessed on June 21, 2017 at:

http://www.sentinelsource.com/news/local/bills-to-address-new-hampshire-nursing-shortage-clear-statehouse/article_772c60be-9f45-50eb-8e1c-f8f0e5f6f280.html

³ Nonfarm employment is a monthly estimate of the number of payroll jobs (full and part-time) located in New Hampshire. Self-employment is excluded from this measure. Resident employment is the number of employed persons residing in New Hampshire. This employment measure includes these self-employed and includes New Hampshire residents employed out of state.

force, the unemployment rate is falls. Economists argue that there always will be a certain level of unemployment, sometimes referred to as the “natural rate” of unemployment. Large improvement in terms of job creation in the labor market, without a similarly sizeable response in the size of the labor force, puts pressure on the number of available workers. The balance in the labor market has shifted from an oversupply of workers to a potential shortage of workers. Additional sources of labor that might be available, such as workers not in the labor force, workers in the surrounding states (increase the number of out-of-state residents commuting to New Hampshire for work or retaining New Hampshire residents that currently are commuting out-of-state), and international migrants.

The number of employed residents has grown closer to total labor force and more than 50,000 nonfarm jobs have been created since January 2010



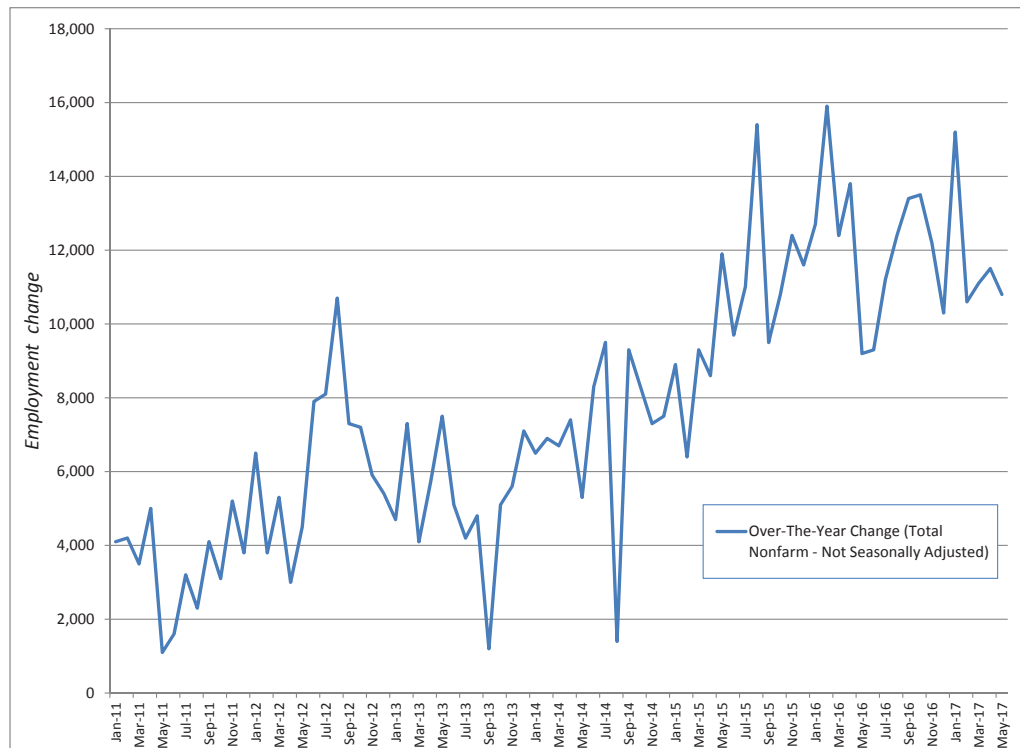
Source: Local Area Unemployment Statistics, Current Employment Statistics, Economic and Labor Market Information Bureau

Nonfarm employment

There has been an uptick in the rate at which nonfarm jobs have been created in the New Hampshire economy. As New Hampshire was coming out of the Great Recession (2007-2009), over-the-year gains in nonfarm employment were modest, averaging less than 5,000 jobs annually. But over the last couple of years, these over-the-year gains have averaged around 12,000 jobs, more than double the number of gains in the earlier phase. These current job gains have helped the state’s economy overall, creating a more optimistic environment among

business owners,⁴ who are now hopeful to expand operations. However, businesses might increasingly face a labor market with few workers available. In order to sustain this current level of job growth, the labor force will have to be expanded.

Nonfarm job growth has started to pick up over the last couple of years



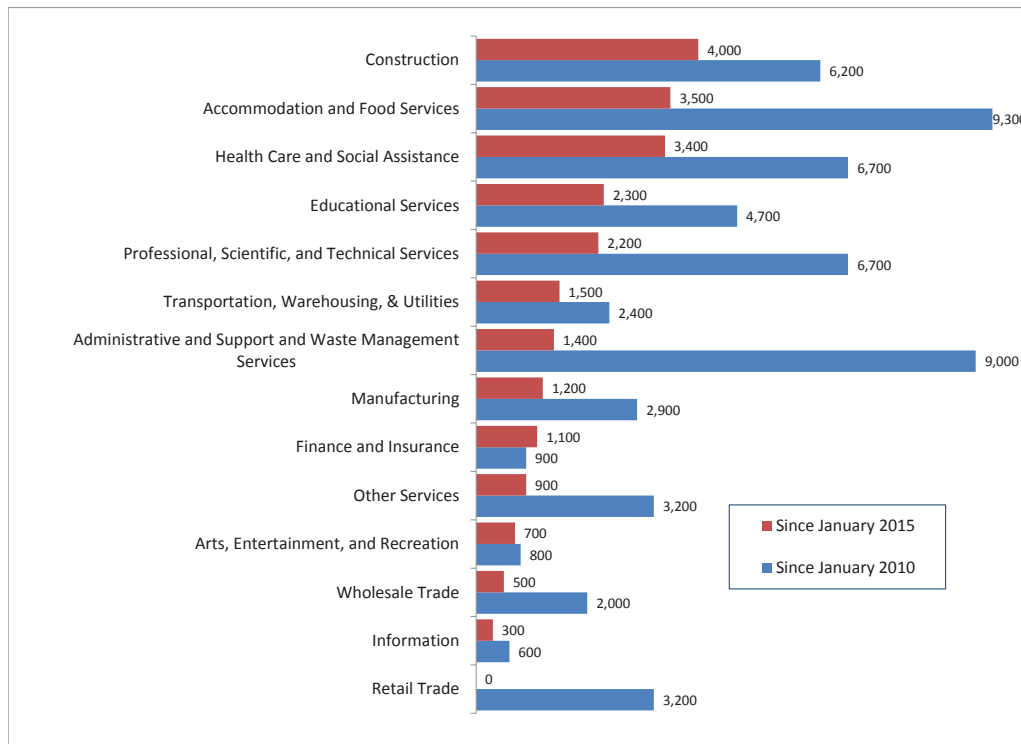
Source: Current Employment Statistics, Economic and Labor Market Information Bureau

In order to understand what sectors are contributing to total job growth, the employment level for all industry sectors were compared to January 2010 — the lowest employment level coming out of the 2007-2009 recession. In comparing seasonally adjusted employment data from January 2010 to May 2017, all sectors have gained employment, an indicator of a broad-based expansion of the New Hampshire economy. Overall, total nonfarm employment gained 59,700 private jobs between January 2010 and May 2017, equivalent to an average monthly gain of 670 private jobs. The sectors contributing the most jobs were *Accommodation and food services*, *Administrative and support and waste management services*, *Health care and social assistance*, and *Professional, scientific and technical services*.

⁴ op. cit. Granite State Poll

But as described, there has been an uptick in job growth more currently, so a second comparison was made between January 2015 and May 2017, seasonally adjusted. Over this more recent timeframe since January 2015, New Hampshire gained 24,100 private jobs in total, which can be translated to an average monthly gain of 830 private jobs. The three sectors contributing the most to the job growth in the more current history were *Construction*, *Accommodation and food services*, and *Healthcare and social assistance*.

Job growth by sector (nonfarm employment, seasonally adjusted)



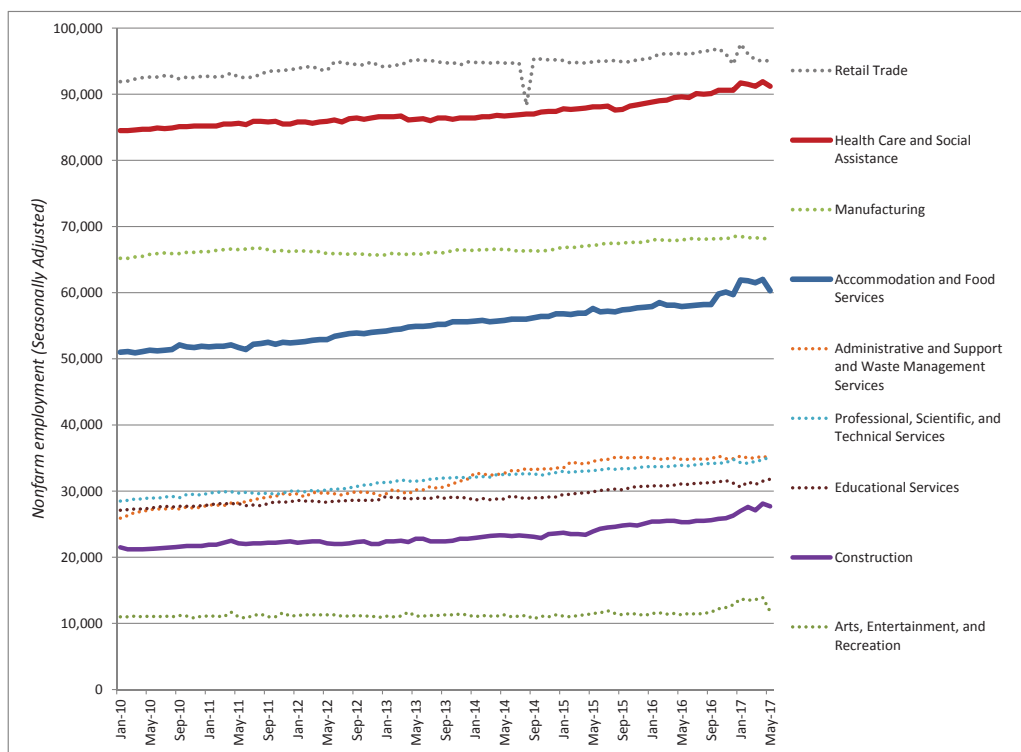
Source: Current Employment Statistics, Economic and Labor Market Information Bureau

Employment in both *Health care and social assistance* and *Accommodation and food services* has been strong since January 2010. But over the last two years, the job growth in each of these two sectors has accelerated. As the economy improved slowly, though steadily, it seemed that business and consumer confidence finally improved enough to spur improvement in other sectors of the economy. This might explain the current job growth in *Construction*. From January 2015 to May 2017, *Construction* gained 4,000 jobs, reaching 27,700 jobs in May 2017 — a level of employment not experienced in this sector since May 2007.

The initial employment gains (since January 2010) in Retail trade stalled over the last couple of years. As consumers are growing more comfortable with their mobile gadgets and the internet, online shopping has started to take hold. Some of this new economic activity associated with online shopping is captured by employment growth in *Transportation, warehousing and utilities*, gaining 1,500 jobs since January 2015.

When comparing the employment levels for each sector, *Healthcare and social assistance* might soon employ more workers than *Retail trade*. Modest employment gains in *Manufacturing* since January 2010 ensured that this sector remained New Hampshire's third largest sector, accounting for about 68,000 jobs in May 2017.

Seasonally adjusted Nonfarm employment level by selected sectors

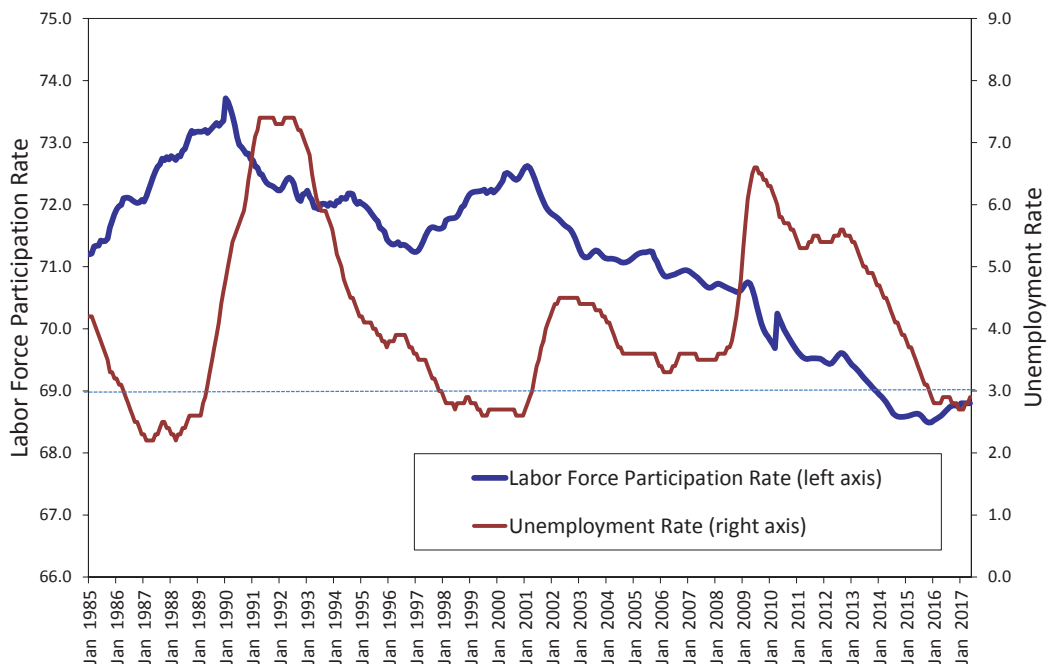


Source: Current Employment Statistics, Economic and Labor Market Information Bureau

Unemployment rate – How low can New Hampshire's rate go?

New Hampshire's unemployment rate for May 2017 increased slightly to 2.9 percent from 2.8 percent in April 2017. Over-the-year from May 2016, the unemployment rate remained unchanged. The unemployment rate has remained below 3.0 percent for an extended period of time (18 months). Since the mid 1980's, New Hampshire's unemployment rate has been below 3.0 percent during two other time periods; from May 1986 to April 1989 and from January 1998 to March 2001. During these periods of very low unemployment, the labor force participation rate increased. Over time, though, there has been a structural decline in the labor force participation rate and, during each consecutive timeframe with very low unemployment the response in the labor force participation rate has been increasingly muted.

New Hampshire's labor force participation rate has experienced a structural decline, but does seem to respond when the unemployment rate is below 3 percent



Source: Local Area Unemployment Statistics, Economic and Labor Market Information Bureau

During this current period of very low unemployment, the labor force participation rate increased only slightly, from 68.5 percent to 68.8. But within the current reality of an aging workforce, a stabilization of the labor force participation rate is in itself a response to a rather strong labor market.

To get a better understanding of the impact that slight changes in the labor participation rate have on the potential workforce, a “counterfactual” estimation can be made to illustrate this dynamic. If the participation rate reached back in January 2000, at 72.6 percent, was applied to the current level of the civilian population age 16 or over, approximately 40,000 additional

persons would be included in the labor force today. However, the median age of New Hampshire's population was 37.1 in 2000, in comparison to 42.8 in 2015.⁵ The labor market dilemma is that the current demand for workers is driven in part by an expanding health care industry responding to the needs of an aging population. In other words, an aging population generates a demand for workers and limits the available labor simultaneously. This demographic composition is even more pronounced in New Hampshire's rural regions.

How can New Hampshire's labor market widen its labor force base?

Another source of labor could come from outside New Hampshire, especially from the neighboring states. Currently, though, the unemployment rate in the neighboring states is rather low as well. The unemployment rate for Vermont was 3.1 percent and the rate for Maine was 3.2 percent in May 2017. The labor market in these two states face similar aging communities as New Hampshire, so it is not likely that these two bordering states will be able to provide New Hampshire with additional workers. In 2015, the median age in Maine was 44.6 years and the median age in Vermont was 43.1 years.⁶

The unemployment rate in Massachusetts was 4.2 percent in May 2017, only slightly lower than the rate for the nation at 4.3 percent. The attractiveness of the Massachusetts job market continues to draw many New Hampshire residents to commute to that state for work. Nonfarm job growth in Massachusetts outpaced New Hampshire from 2012 to 2015, but has been trending lower than New Hampshire's job growth over the past year. There are currently both commercial and residential developments being built in southern New Hampshire, betting that growth in Massachusetts will have a spill-over impact in New Hampshire. As office space is limited in the Boston area, rents rise and can become undesirable.⁷ An increase in traffic congestion might also encourage New Hampshire residents to seek employment opportunities closer to home, rather than commuting to Massachusetts for work. In general, though, the communities in southern New Hampshire are growing in tandem with the Greater Boston area and the labor market is in reality sharing the same workforce.

⁵ 2015 American Community Survey 1- year estimate

⁶ Ibid

⁷ In the first quarter of 2017, industrial vacancy rate for the Greater Boston area was down to "11.2 percent, a new low point for this economic expansion." Rents have risen eight percent over the last year. Greater Boston Industrial Viewpoint. Accessed on June 15, 2017 at <http://www.colliersboston.com/flipbook/research/2017-q1-industrial-viewpoint/?page=2>

Is there still slack in the labor market? Encouraging higher levels of labor market intensity.

Another way to make more labor available is to have the current workers work more hours. In today's labor market, many workers are salaried and many workers are working on results-oriented measures not tied to hourly wages. So it might be hard to establish the level of ability to work more hours.

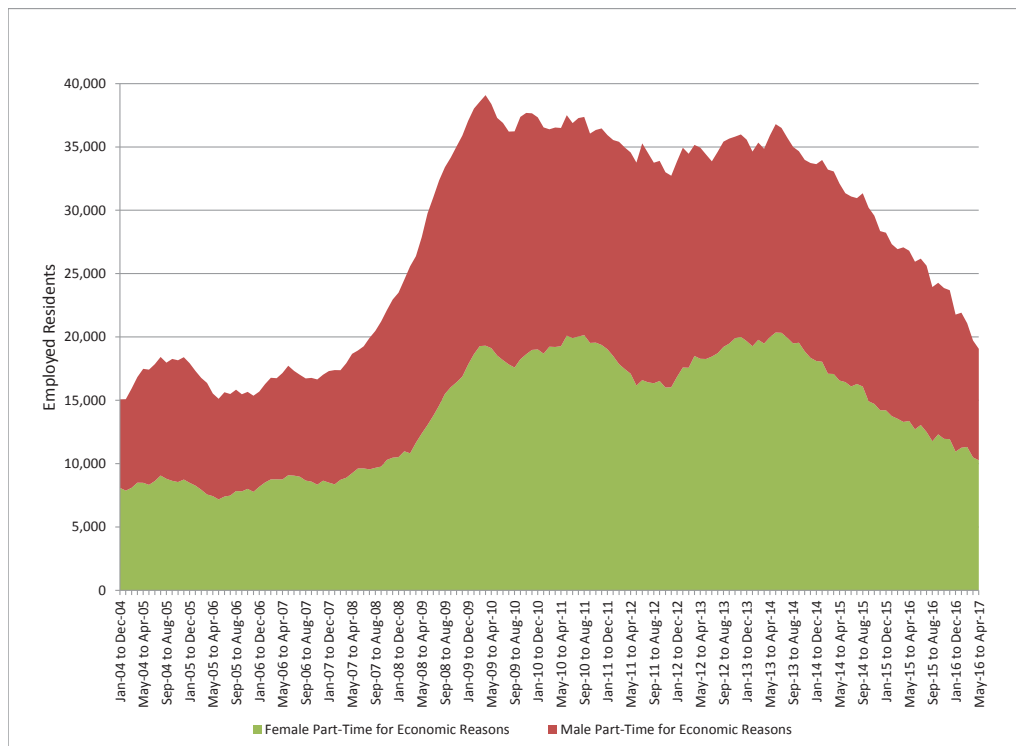
According to data compiled by Bureau of Labor Statistics, and based on the Current Population Survey, in 2016 there were 398,000 workers in New Hampshire paid wages at an hourly rate.⁸ This was approximately 55 percent of all employed New Hampshire residents in 2016. Using data produced by Current Population Survey (CPS), though, on part-time and full-time employment status, an estimate can be made of persons working part-time. Some of these workers might be encouraged to change to full-time status. Part-time employment is measured by reason for part-time status. The two main categories are for *economic reasons* (involuntary part-time) and for *non-economic reasons* (voluntary part-time).

Part-time for economic reasons indicates that the worker is working part-time and would like to work more hours but feels unable to find such work.

The number of workers working part-time for economic reasons has decreased from a high of about 39,000 persons in the aftermath of the Great Recession to below 20,000 persons. This measure is considered a way to estimate the slack in the labor market. As the level has returned to the level prior to the Great Recession, it is likely not going to be reduced much further.

⁸ Table 3. Wage and salary workers paid hourly rates with earnings at or below the prevailing federal minimum wage, by state, 2016 annual averages. Bureau of Labor Statistics. Accessed on June 15, 2017 at <https://www.bls.gov/opub/reports/minimum-wage/2016/home.htm>

The level of part-time workers for economic reasons in New Hampshire has subsided to a normal level



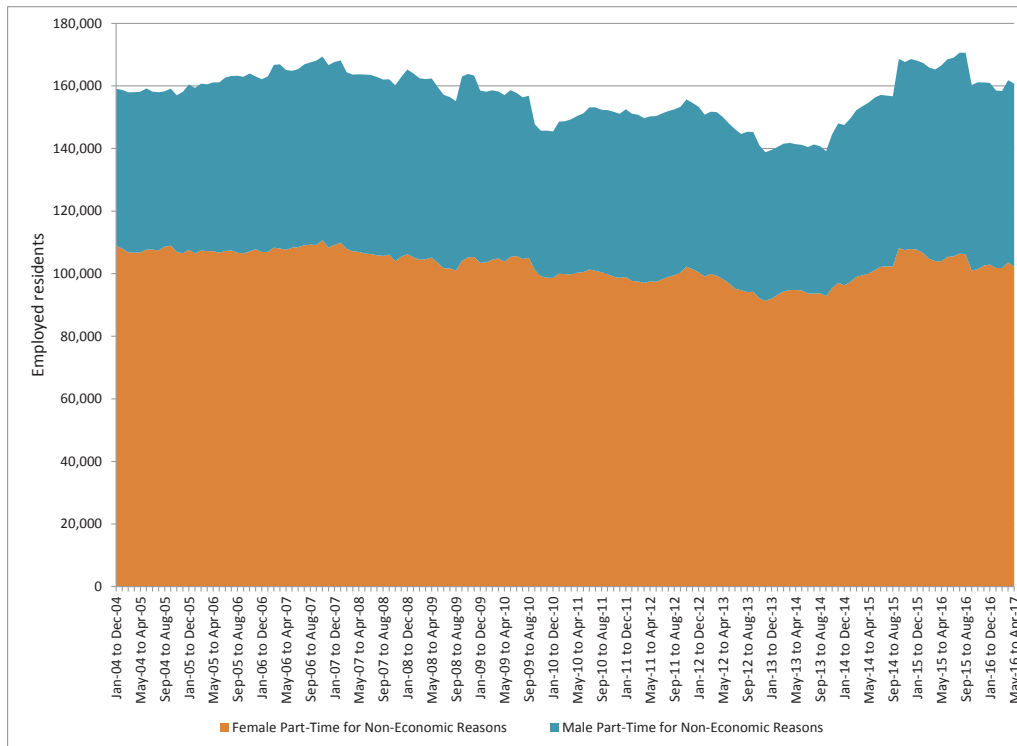
Source: U.S. Census Bureau, unpublished Current Population Survey data

Part-time for non-economic reasons indicates that the worker is working part-time due to one of many reasons, but not due to the economic conditions of the labor market. Reasons for working part-time for non-economic reasons are childcare problems, family or personal obligations, school or training, retirement, or Social Security limits on earnings.

Working part-time for non-economic reasons can be used as a way to measure the *intensity of participation in the labor market*.

- The group of employed are much larger than the part-time for economic reasons.
- After several years of decline in the aftermath of the Great Recession, part-time workers for non-economic reasons started to grow for both males and females.
- For every male part-time, there are twice as many female part-time workers for non-economic reasons. This male-to-female ratio seems consistent over time. This is likely due to females typically being responsible for family care.

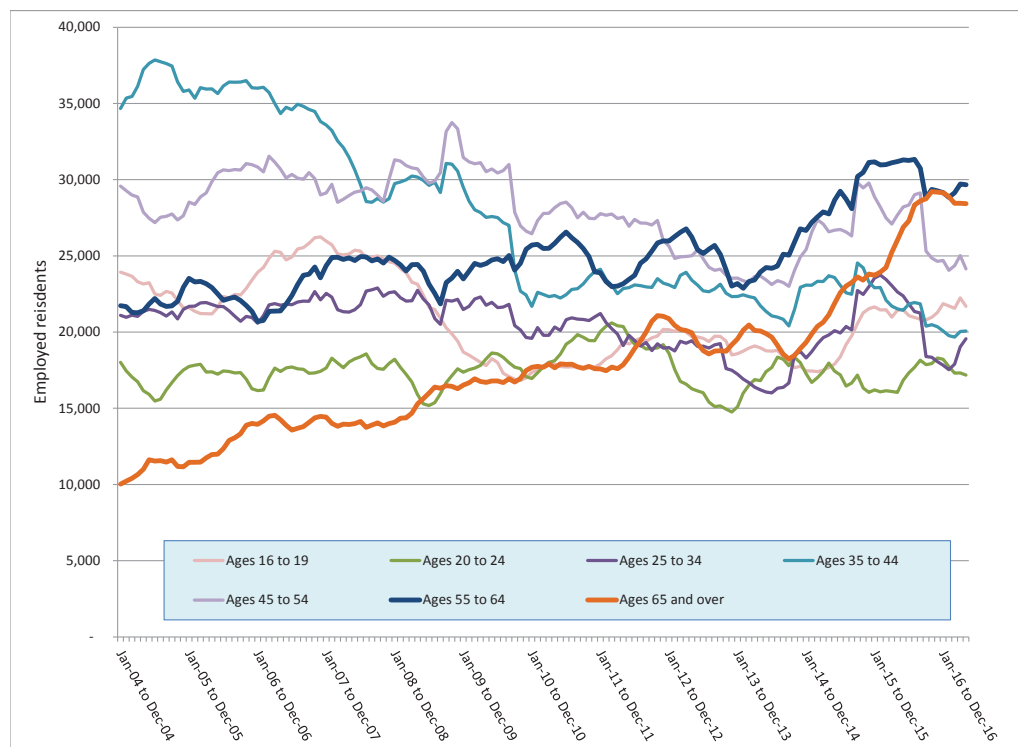
There are twice as many females working part-time for non-economic reasons as males in New Hampshire



Source: U.S. Census Bureau, unpublished Current Population Survey data

There are currently approximately 160,000 employed residents working part-time for non-economic reasons. Maybe some of these workers could be encouraged to work full-time. Employers would have to find out what would entice these part-time workers for non-economic reasons to take-on more full-time employment. Increased flexibility in job structure, such as telecommuting and alternative work schedules as well as more readily available and affordable childcare options might entice some part-time workers to pursue a full-time work schedule.

There has been an increase in the number of older workers in New Hampshire working part-time for non-economic reasons



Source: U.S. Census Bureau, unpublished Current Population Survey data

Over the last couple of years the rise in part-time workers for non-economic reasons is due to an increase in part-time workers in the older age cohorts (Ages 55 to 64 and Ages 65 and over).

The labor market might be able to encourage a more intense level of participation, though that might be difficult as the older workers appreciate the flexibility of part-time work.

Not in the labor force by County

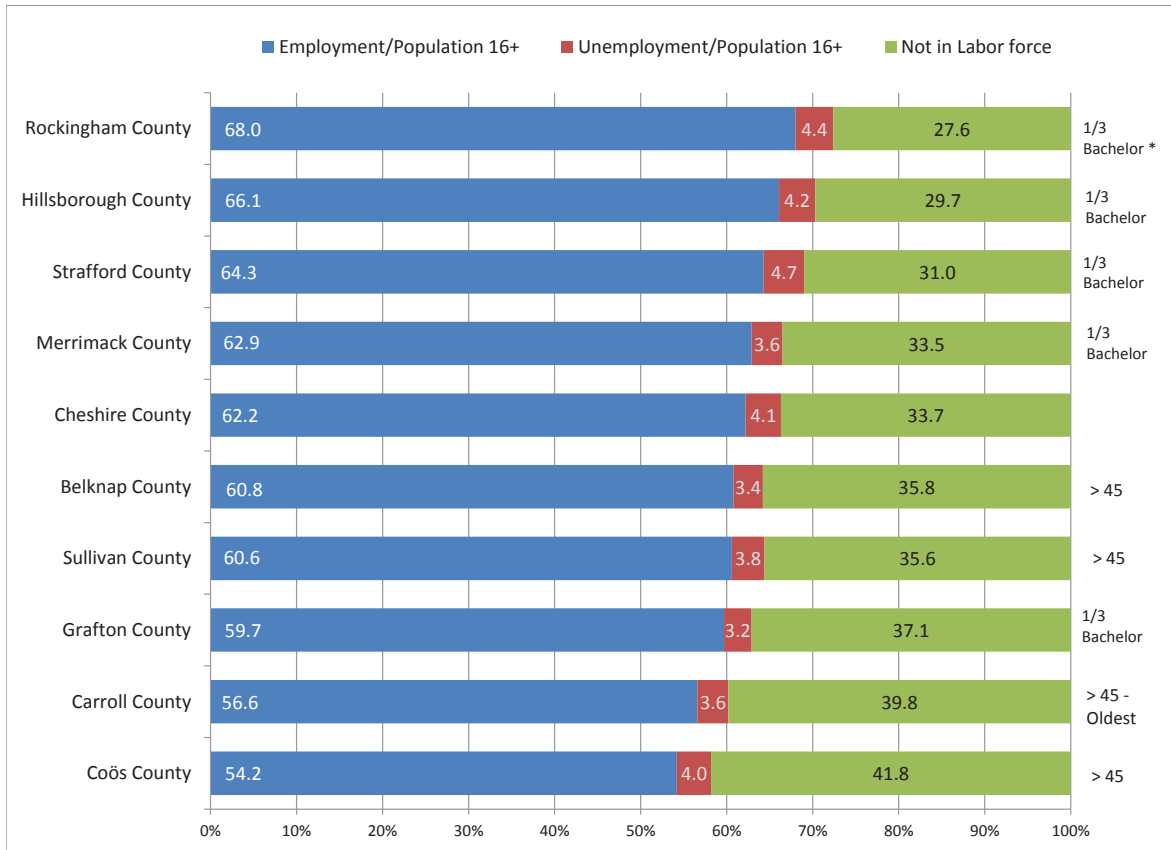
Another source of labor is from encouraging persons not in the labor force to re-enter the labor force. There can be many reasons why a person is not in the labor force. Most common reasons include family care responsibilities, retirement, disability, and studying full-time. Willingness to join the labor force can be swayed by the type of job opportunities available and by the level of pay being offered. The ability to participate in the labor market can be helped by removing barriers to employment, such as transportation and availability of affordable child- and eldercare. Within New Hampshire, the share of the population attached to the labor force differs from region to region.⁹

⁹ Data on employment status is available by county from the American Community Survey 5-year estimates. In New Hampshire, American Community Survey 1-year estimate is not available for all counties as the population does not meet the minimum threshold. The disadvantage of using the 5-year estimate is that tracking progress over time is limited. Data on employment to population ratio from Current Population Survey is not estimated at the sub-state level.

Three major factors that influence labor force participation:

- Age of the population- The older the median age in an area, the more likely a larger share of the population is retired. Despite the fact that the labor force participation rate in older age groups has been increasing; however there is still an immense drop in labor force participation for the age cohorts under 65 years of age compared to those 65 and over.
- Educational attainment of the population – In a recent white paper from the Federal Reserve Bank of Boston, it was concluded the participation rate for workers ages 65 and over increased more sharply in New England than the U.S. between 2007 and 2015. The paper pointed out that the high level of educational attainment among the region's senior citizen population has led to this increase in labor force participation.¹⁰
- Job creation within the county or proximity to an area with economic opportunities.

The share of population attached to the labor force vary greatly between New Hampshire's counties



Source: U.S. Census Bureau, 2011-2015 American Community Survey 5-Year Estimates

¹⁰ Mary A. Burke. Labor Force Participation in New England vs the United States 2007-2015: Why Was the Regional Decline More Moderate? Page 12. Federal Reserve Bank Boston Current Policy Perspectives No. 16-2 (2016) Accessed on June 16, 2017 at <https://www.bostonfed.org/publications/current-policy-perspectives/2016/labor-force-participation-in-new-england-vs-the-united-states-2007-2015.aspx>

The share of the population not in the labor force varies substantially, ranging from 41.8 percent in Coös County to 27.6 percent in Rockingham County. Four of the counties with the highest median age are also the ones with the highest shares of population not in the labor force. In addition, the share of the population with a Bachelor's degree or higher in Coös County is only 17.8 percent. In comparison, the share of the population in Rockingham County with a Bachelor's degree or above was 38.8 percent, the highest among all New Hampshire counties.

The median age in Carroll County was 50.3 years, the highest of all New Hampshire's counties. Meanwhile, the share of the population with a Bachelor's degree or above was rather high as well, at 32.1 percent. In-migration of retirees over the last couple of decades has elevated the median age of the population and likely elevated the educational attainment as well.

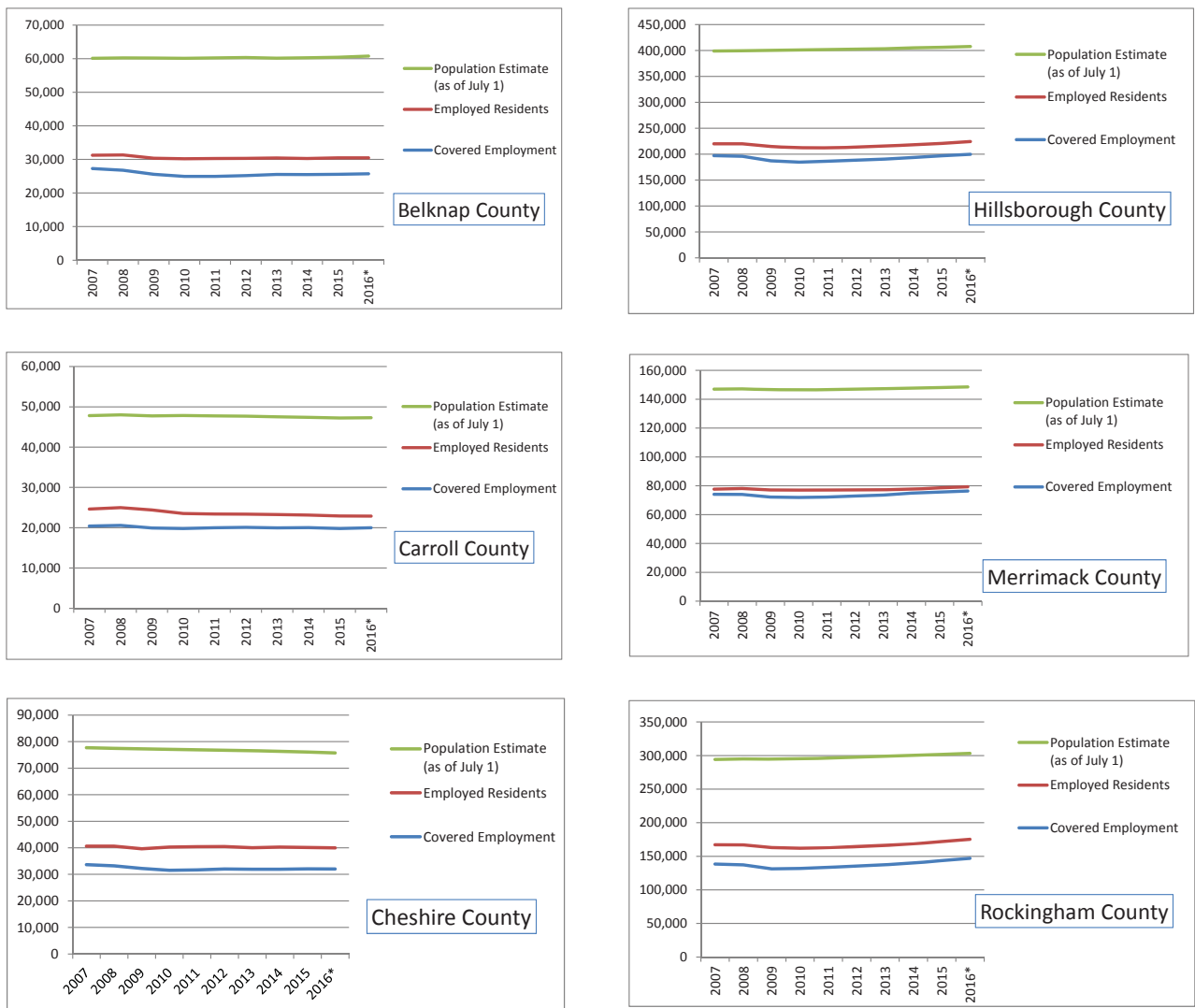
Grafton County has a fairly high share of the population not in the labor force, despite a high level of educational attainment and, with a median age at 41.9 years, the third lowest among New Hampshire's counties. Due to Dartmouth College and Plymouth State University being located in Grafton County, a high share of younger persons (students) living on campuses in Hanover and Plymouth helped bring the median age down in a region that otherwise is aged. Grafton County also has the second highest share of population with a Bachelor's degree or above, which would encourage a higher share of the population to be attached to the labor force. One reason for the high share of the population not in the labor force could be that most of the students are attending school full-time and may not participate in the labor force.

The last factor impacting the level of labor force attachment is the availability of jobs in the region. In the following we will compare the ten counties in terms of job and population growth over the last decade.

Three parameters of community economic development (Covered employment, Resident employment and Population)

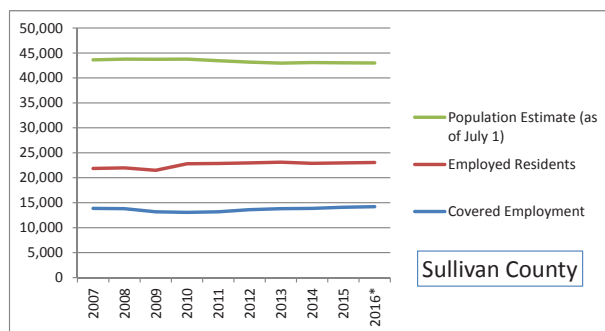
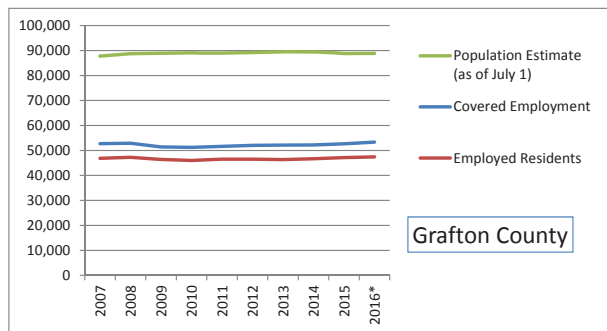
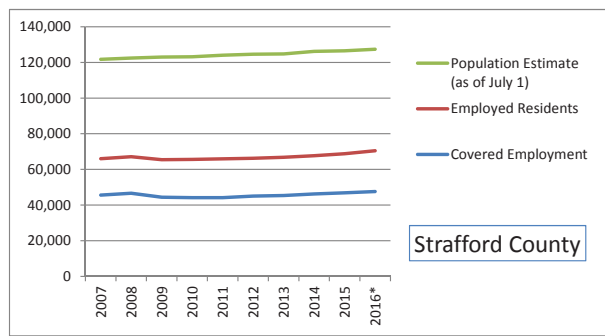
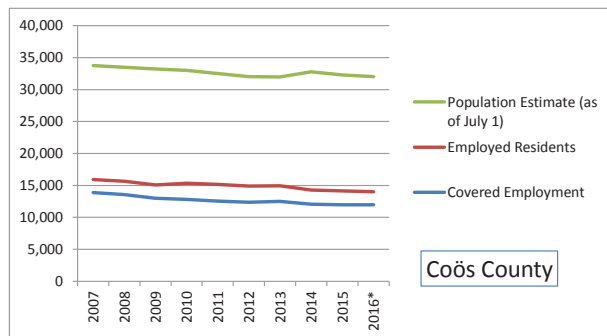
In general, the New Hampshire labor market has been growing at a faster rate, and the level of employment and labor force has reached above the pre-recession levels. But how do these measures look when evaluated at the county level? Below the ten counties are compared over a ten-year period on three parameters. These parameters are covered employment, resident employment, and population.

Ten charts depicting whether counties have recovered the number of jobs lost during the downturn



Source: U.S. Census Bureau, Population Estimate; Quarterly Census of Employment and Wages, Local Area Unemployment Statistics, Economic and Labor Market Information Bureau

*2016 is preliminary



Change 2007 to 2016*	Belknap	Carroll	Cheshire	Coös	Grafton	Hillsborough	Merrimack	Rockingham	Strafford	Sullivan
Covered Employment	-1,531	-404	-1,630	-1,883	597	2,615	2,344	8,541	2,027	336
Employed Residents	-788	-1,741	-638	-1,893	589	4,335	1,664	8,215	4,477	1,190
Population Estimate (as of July 1)	670	-540	-1,971	-1,712	1,124	8,918	1,558	9,119	5,693	-604

Source: U.S. Census Bureau, Population Estimate; Quarterly Census of Employment and Wages, Local Area Unemployment Statistics, Economic and Labor Market Information Bureau

*2016 is preliminary

From 2007 to 2016, four of the ten New Hampshire counties have lost employment, both in term of covered jobs in the county and number of employed residents in the county. These four counties are Belknap, Carroll, Cheshire and Coös counties. Three of these counties have likewise experienced declines in their population. Belknap County has experienced population growth despite the job losses. This is a possible indication that additional retirees have migrated to the county.

Population in Sullivan County also declined slightly, although this county experienced both some job growth and substantial additional resident employment.

Grafton County is the only county in New Hampshire with a larger covered employment level than the level of employed residents. A higher level of covered employment than resident employment is an indication that Grafton County attracts workers living outside the region. Grafton County improved on all three parameters between 2007 and 2016. As Grafton County borders Sullivan County to the north, job growth in Grafton County can be beneficial to residents in Sullivan County.

The counties experiencing the most gains on all three measures are Rockingham, Hillsborough, and Strafford counties. There were 9,119 more persons living in Rockingham County in 2016 than in 2007. About 8,500 jobs were gained in covered employment, three times more jobs than were added in Hillsborough County. Interestingly, there was slightly larger gain in resident employment in Strafford County than in Hillsborough County, likely due to more Strafford County residents commuting to Rockingham County for work. These same three counties are those with the smallest shares of population not in the labor force. This suggests that there is a connection between job opportunities, labor force attachment and population growth. However, job opportunities do not necessarily have to be within the county of residence, as long as job opportunities are within a reasonable commute. Job growth can be faster in one county, whereas the neighboring county would concurrently experience larger population and resident employment growth.

Conclusion

Overall, the labor market in New Hampshire is doing well in terms of job creation. In addition, the unemployment rate has remained below 3.0 percent for an extensive amount of time. This low unemployment rate has created a tight labor market, where employers need to be more creative in order to attract additional workers. Flexibility in work scheduling and other accommodations might be necessary to entice persons not in the labor force to enter or re-enter the labor force. Similar remedies might be necessary to get part-time workers to accept more hours, thereby shifting to full-time status.

However, there are regional differences from county to county. The southeastern parts of New Hampshire, as well as Grafton County, are growing in terms of jobs and population. On the other hand, the northern parts, except Grafton County, and western parts of the state have been losing both jobs and population between 2007 and 2016. The rapidly aging population in these mostly rural communities, in combination with lower educational attainment, is a large obstacle to growth. Encouraging younger workforce-ready residents to relocate to rural communities would solve this problem. But what would be the incentive for younger workers to do so? There are many reasons for why young adults are less likely to stay or relocate to the rural areas of New Hampshire. A couple of examples of what could transform New Hampshire's more rural communities in order to attract the next generation of workers include:

- Expanded ability to be connected to the web;
- Better marketing of the career opportunities that are available;
- Create a *movement*, such as “work in the cloud, live in the hills” as opposed to “work in the city, play in the hills”

In addition, technology and innovation might alleviate the high demand for workers related to the delivery of services to an aging population.



The products and services of the NHES Economic and Labor Market Information Bureau result from the cooperation and teamwork of the entire ELMI Bureau staff: Michael Argiropolis, Robert Cote, Gregory David, Bruce DeMay, Deborah Dunn, Katrina Evans, Donna Finlay, Eleanor Goodbread, Debra Jodoin, Anita Josten, Donald Kelley, Annette Nielsen, Bruce Olinsky, Martin Page, Peter Sgrulloni, and James Smith.

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