

# ECONOMIC CONDITIONS in New Hampshire



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**Employment  
SECURITY**

Estimated retail sales in New Hampshire totaled \$24.7 billion in 2002, a 1.4 percent growth over-the-year.

New Hampshire is a high retail sales state in a high retail sales region. According to Sales and Marketing Management's 2002 Survey of Buying Power, New Hampshire's estimated total retail sales<sup>#</sup> for 2002 were \$24.7 billion, up 1.4 percent from 2001. New England saw an increase of nearly one percent, while nationally retail sales had an over-the-year drop of almost one percent. The nation's loss can be attributed to the over-the-year drop in six of the nine regions.

New Hampshire had the third largest total retail sales in New England. Combined, Massachusetts and Connecticut had nearly 70 percent of New England's total retail sales. New Hampshire followed claiming nearly 12 percent. New England's retail sales reached \$206.8 billion in 2002. Out of the nine regions, New England had the smallest number of residents, 14.1 million, and the smallest number of

households, 5.5 million. This region had the second smallest total retail sales in the nation; only East South Central (which includes Alabama, Kentucky, Mississippi, and Tennessee) was smaller, with \$194.5 billion in 2002. New England's share of the nation's retail sales was almost six percent.

Among the regions, New England had the largest per household retail sales, at \$37,761. Retail sales per household in the Granite State were \$50,113, higher than the New England region and the nation. It was the highest in New England, leading the next closest state Connecticut by over \$11,500.

New Hampshire also had the largest per capita retail sales, \$19,369. Again Connecticut followed, but the difference was just over \$4,500. One possible reason why New Hampshire had the largest retail sales per household and the largest per capita retail sales could be because New Hampshire does not have a sales

*Continued on page 2*

**In 2002, New Hampshire's household retail sales surpassed all other New England states by \$11,500**

	Average Household Retail Sales	Per Capita Retail Sales	Per Capita EBI	Average Household EBI	Median Household EBI
United States	\$33,662	\$12,646	\$18,491	\$49,218	\$38,365
New England	\$37,761	\$14,688	\$21,600	\$55,531	\$43,350
Connecticut	\$38,550	\$14,788	\$25,056	\$65,318	\$49,688
Maine	\$35,923	\$14,742	\$15,556	\$37,907	\$31,832
Massachusetts	\$37,355	\$14,444	\$22,096	\$57,144	\$45,620
New Hampshire	\$50,113	\$19,369	\$21,199	\$54,848	\$44,764
Rhode Island	\$28,640	\$11,222	\$18,274	\$46,635	\$39,040
Vermont	\$32,338	\$12,880	\$16,449	\$41,296	\$35,128

Source: "2002 Survey of Buying Power." Sales and Marketing Management. September 2002.

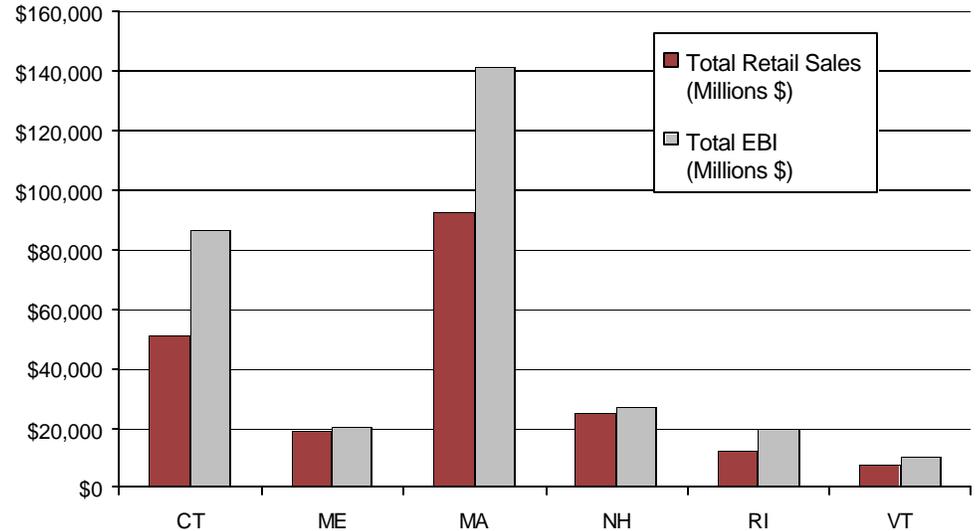
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tax, attracting shoppers from surrounding states.

Another tool to analyze retail sales is called the Effective Buying Income (EBI), which was developed by Sales and Market-

money available to spend than they did in 2001. All other New England states, except Rhode Island, had reductions of their total EBI ranging from -0.1 percent in Massachusetts to -4.6 percent in Maine.

**New Hampshire's total retail sales accounted for over 91 percent of the state's total EBI in 2002, second only to Maine**



Source: "2002 Survey of Buying Power." Sales and Marketing Management, September 2002.

ing Management. The EBI is estimated by taking personal income less personal tax and non-tax payments. EBI resembles disposable income.

In 2002, New Hampshire had the fastest growing total EBI in New England, up 3.2 percent over-the-year, bringing the total to just under \$27 billion. This means that in 2002 Granite Staters had more

New Hampshire had a per capita EBI of \$21,199, up one percent from 2001. New England had the highest per capita EBI, \$21,600, among the regions. Per capita EBI was the amount that was available to spend per person, whereas, per capita retail sales is the amount that was spent on retail items per person.

Average household EBI in New Hampshire was higher than the nation's and was the third highest among the New England states. Among the nine regions, New England had the largest average household EBI, \$55,531 in 2002.

Gail Houston

Source: "2002 Survey of Buying Power." Sales and Marketing Management, September 2002.

\* According to Sales and Marketing Management total retail sales reflects net sales (minus refunds and allowances for returns) for all establishments primarily engaged in retail trade, plus eating and drinking establishments. Receipts from repairs and other services (by retailers) are also included, but retail sales by wholesalers and service establishments are not.

**New Hampshire had 12 percent of New England's total retail sales in 2002**

States	Population * (thousands)	Households * (thousands)	2002 Total Retail Sales (thousands)	Total EBI (thousands)
United States	286,817.4	107,755.0	\$3,627,218,024	\$5,303,481,498
New England	14,077.4	5,475.8	\$206,773,785	\$304,074,420
Connecticut	3,436.6	1,318.2	\$50,816,891	\$86,102,037
Maine	1,293.0	530.6	\$19,060,788	\$20,113,537
Massachusetts	6,393.8	2,472.3	\$92,352,349	\$141,276,897
New Hampshire	1,273.2	492.1	\$24,660,419	\$26,990,623
Rhode Island	1,065.2	417.4	\$11,954,155	\$19,465,472
Vermont	615.6	245.2	\$7,929,183	\$10,125,854

Source: "2002 Survey of Buying Power." Sales and Marketing Management, September 2002. \* Data is for a point in time (01/01/02) and was estimated by Sales and Marketing Management

**New Hampshire led New England in computer ownership and Internet usage in both 1998 and 2001.**

A home computer has become almost common place in New Hampshire households as evidenced by a US Census ranking of third highest concentration nationally in 2001. Two-thirds of all households surveyed in the Granite State reported having a computer in 2001, up from just over half in 1998. Only Alaska and Utah had higher percentages of their households owning computers in 2001.

In New England, computer ownership in 2001 ranged from 58.6 percent of households in Rhode

*Continued on page 8*

**Percent of Households Owning Computers (Top 10 Plus New England States)**

Rank	State	1998	2001
	US	42.1%	55.5%
1	Alaska	62.4	68.7
2	Utah	60.1	67.7
3	New Hampshire	54.2	67.7
4	Washington	56.3	66.5
5	Oregon	51.3	65.8
6	Colorado	55.3	64.7
7	Minnesota	47.6	64.6
8	Maryland	46.3	64.1
9	Hawaii	42.3	63.1
10	Maine	43.4	62.8
14	Vermont	48.7	60.4
17	Massachusetts	43.4	59.1
19	Connecticut	43.8	58.7
20	Rhode Island	41.0	58.6

**Unemployment Compensation Claims Activity**

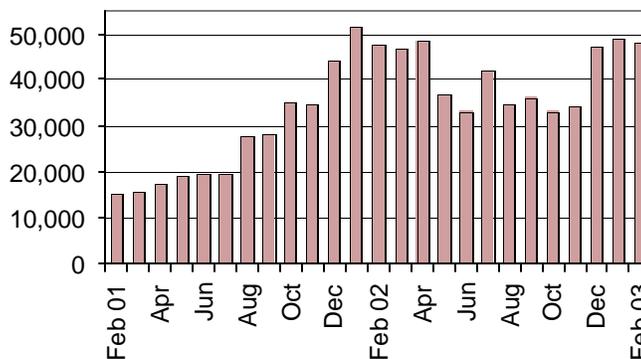
Total Regular Unemployment Compensation Programs:				Change from Previous			
				Month		Year	
	Feb-03	Jan-03	Feb-02	Net	Percent	Net	Percent
Initial Claims	4,333	6,543	4,550	-2,210	-33.8%	-217	-4.8%
Continued Weeks	47,862	49,002	47,486	-1,140	-2.3%	376	0.8%

**Claims Activity**

**Unemployment Compensation Fund**

Unemployment compensation fund balance at the end of February	\$269,687,726.99
Average payment for a week of total unemployment:	\$260.46
Net benefits paid:	\$10,889,778.62
Net contributions received during the month:	\$1,800,893.61
Interest Received:	\$0.00
Reed Act Distribution:	\$0.00
Reed Act Withdrawn:	\$0.00

**Trust Fund**



**Continued Weeks Claimed**

**Feb. 2001 - Feb. 2003**

Although continued weeks claimed for February 2003 showed a slight over-the-month decrease, they were still up from a year ago.

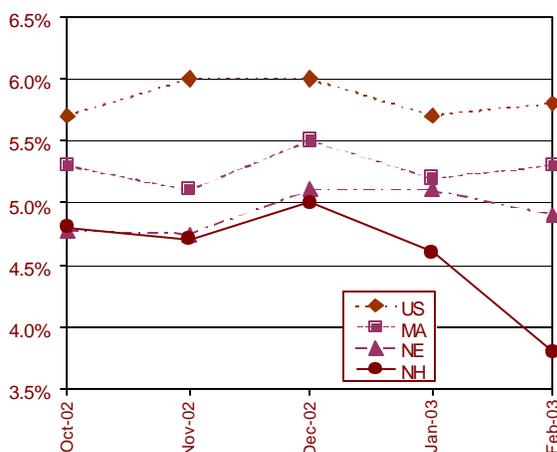
Feb-03	Jan-03	Feb-02	Change from Previous	
			Month	Year
183.1	181.7	177.8	0.8%	3.0%

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

**Consumer Price Index**

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

New Hampshire's February 2003 unemployment rate of 3.8 percent was the lowest in New England and sixth lowest nationwide.



### Unemployment Rates by Region

	preliminary Feb-03	revised Jan-03	Feb-02
United States	5.8%	5.7%	5.6%
Northeast	5.7%	5.8%	5.4%
New England	4.9%	5.1%	4.5%
Connecticut	5.0%	4.9%	4.1%
Maine	4.6%	4.5%	4.2%
Massachusetts	5.3%	5.2%	5.0%
New Hampshire	3.8%	4.6%	4.4%
Rhode Island	5.1%	5.2%	4.9%
Vermont	4.0%	4.0%	3.8%
Mid Atlantic	6.0%	6.1%	5.7%
New Jersey	5.7%	5.5%	5.5%
New York	6.1%	6.3%	6.0%
Pennsylvania	6.2%	6.1%	5.5%

### Seasonally Adjusted Labor Force Estimates

By Place of Residence

	Oct-02	Nov-02	Dec-02	revised Jan-03	preliminary Feb-03
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#### New Hampshire

Unemployment Rate	5.0%	5.0%	5.0%	4.6%	3.8%
Civilian Labor Force	709,310	709,460	706,500	719,100	715,060
Number Employed	674,190	674,310	671,320	685,880	688,200
Number Unemployed	35,120	35,150	35,180	33,220	26,860

#### United States (in thousands)

Unemployment Rate	5.8%	5.9%	6.0%	5.7%	5.8%
Civilian Labor Force	145,393	145,180	145,150	145,838	145,857
Number Employed	136,988	136,542	136,439	137,536	137,408
Number Unemployed	8,405	8,637	8,711	8,302	8,450

### Seasonally Adjusted Nonfarm Employment

By Place of Establishment

Supersector	Oct-02	Nov-02	Dec-02	revised Jan-03	preliminary Feb-03
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Total Nonfarm	620,700	619,700	616,700	618,200	616,200
Construction	28,100	27,900	28,200	28,200	27,600
Manufacturing	84,400	83,700	82,800	81,500	80,500
Trade, Transportation, and Utilities	140,400	139,600	138,900	138,200	139,000
Leisure and Hospitality	60,600	60,200	61,100	61,700	61,200
Government	87,900	87,900	85,300	88,700	89,000



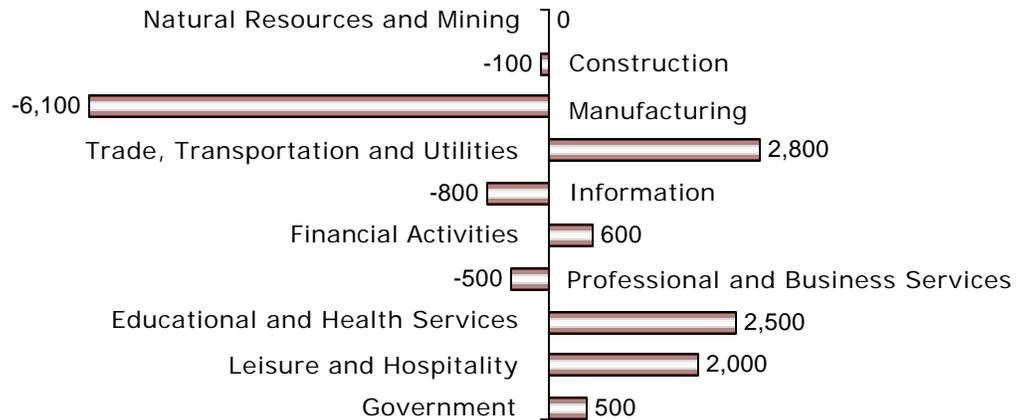
**Monthly Not Seasonally Adjusted New Hampshire Nonfarm Wage and Salary Employment**

Employment in the state increased by 800 over-the-year despite the large drop in Manufacturing.

Current Employment Statistics Employment by Sector by place of establishment	Number of Jobs			Change from previous:	
	Feb-03 (preliminary)	Jan-03 (revised)	Feb-02	Month	Year
Total All Sectors	609,400	610,200	608,600	-800	800
Private Employment Total	517,700	522,200	517,400	-4,500	300
Natural Resources & Mining	900	900	900	0	0
Construction	25,300	26,500	25,400	-1,200	-100
Manufacturing	80,800	81,700	86,900	-900	-6,100
Durable Goods	59,900	60,500	65,000	-600	-5,100
Non-Durable Goods	20,900	21,200	21,900	-300	-1,000
Trade, Transportation and Utilities	136,400	138,200	133,600	-1,800	2,800
Wholesale Trade	26,100	26,200	26,400	-100	-300
Retail Trade	94,500	96,300	92,000	-1,800	2,500
Transportation and Utilities	15,800	15,700	15,200	100	600
Information	12,500	12,700	13,300	-200	-800
Financial Activities	36,800	37,000	36,200	-200	600
Professional and Business	52,300	52,500	52,800	-200	-500
Educational and Health	94,000	93,400	91,500	600	2,500
Leisure and Hospitality	56,900	57,400	54,900	-500	2,000
Other Services	21,800	21,900	21,900	-100	-100
Government Total	91,700	88,000	91,200	3,700	500

**Change in Nonfarm Employment**

February 02 to February 03



**Monthly Analysis of Current Employment Statistics (CES) data**

For Further Analysis Please read the *Detailed Monthly Analysis of Industry Employment Data* on our Web site at <[www.nhes.state.nh.us/elmi/nonfarm.htm](http://www.nhes.state.nh.us/elmi/nonfarm.htm)>

**Seasonally Adjusted:** The manufacturing supersector's (NAICS supersector 30) 1,000-job decline accounted for one half of the 2,000 jobs lost in February's preliminary seasonally adjusted estimates for total nonfarm employment. The construction supersector (NAICS supersector 20) trimmed 600 jobs from its ranks, while leisure and hospitality (NAICS supersector 70) decreased its work force by 500 jobs.

February's seasonally adjusted estimates did exhibit some bright spots as the

trade, transportation, and utilities supersector (NAICS supersector 40) added 800 jobs, and government supersector (NAICS supersector 90) employment increased by 300.

**Unadjusted:** The 800-job total loss in February's preliminary unadjusted estimates reflected that New Hampshire was still unwinding from the peak holiday season.

Trade, transportation, and utilities (NAICS supersector 40) suffered the

*Continued on page 7*

### Monthly Unadjusted Nonfarm Wages and Salary Employment by Primary Metropolitan Statistical Area

Employment by Sector number of jobs by place of establishment	Manchester PMSA			Nashua PMSA			Portsmouth-Rochester NH-ME PMSA		
	Preliminary Feb-03	Change from previous:		Preliminary Feb-03	Change from previous:		Preliminary Feb-03	Change from previous:	
		Month	Year		Month	Year		Month	Year
Total All Sectors	107,200	-300	600	93,600	-600	-400	125,100	1,900	3,600
Private Employment Total	94,200	-600	100	83,700	-700	-200	100,700	500	3,500
Natural Resources and Construction	6,100	-100	400	3,400	0	100	4,100	-100	0
Manufacturing	11,800	100	-400	21,800	-300	-1,600	13,500	0	-600
Trade, Transportation, and Utilities	23,700	-200	700	21,200	-200	300	26,900	0	1,900
Wholesale Trade	6,200	0	200	3,500	0	100	4,100	0	-400
Retail Trade	13,700	-200	300	15,600	-200	100	20,200	0	2,200
Transportation and Utilities	3,800	0	200	2,100	0	100	2,600	0	100
Information	3,200	0	0	1,700	0	-300	3,100	0	-200
Financial Activities	8,400	-100	-100	6,300	-100	0	7,100	-100	-100
Professional and Business	12,100	-100	-600	7,300	-100	100	11,000	200	-400
Educational and Health	16,500	100	200	11,600	100	400	18,600	0	1,300
Leisure and Hospitality	8,000	-200	-200	7,200	-100	700	10,100	10,100	10,100
Services	4,400	-100	100	3,200	0	100	4,200	0	400
Government Total	13,000	300	500	9,900	100	-200	24,400	1,400	100

### Average Earnings and Hours of Production Workers in Manufacturing

Sector	Average Weekly Earnings			Average Weekly Hours			Average Hourly Earnings		
	Feb-03 prelim.	Jan-03 revised	Feb-02	Feb-03 prelim.	Jan-03 revised	Feb-02	Feb-03 prelim.	Jan-03 revised	Feb-02
<b>New Hampshire</b>									
All Manufacturing	\$587.20	\$595.31	\$557.79	40.0	39.9	40.1	\$14.68	\$14.92	\$13.91
Durable Goods	614.70	627.35	577.53	41.2	41.3	40.5	14.92	15.19	14.26
Nondurable Goods	522.66	517.57	499.74	37.2	36.5	38.8	14.05	14.18	12.88
<b>Manchester PMSA</b>									
All Manufacturing	\$637.93	\$602.55	\$631.58	39.5	38.6	39.4	\$16.15	\$15.61	\$16.03
<b>Nashua PMSA</b>									
All Manufacturing	\$574.06	\$579.68	\$559.50	39.4	40.2	38.8	\$14.57	\$14.42	\$14.42
<b>Portsmouth-Rochester, NH-MA PMSA</b>									
All Manufacturing	\$649.52	\$680.85	\$677.98	43.1	42.5	43.6	\$15.07	\$16.02	\$15.55

greatest setback in the monthly employment total with a 1,800-job reduction.

In addition to the completion of a holiday shopping season, other factors contributed to the overall job loss. The construction supersector (NAICS supersector 20), which experienced some seasonal downturn and project completion, reduced its ranks by 1,200 jobs. Manufacturing (NAICS supersector 30) pared another 900 jobs from its roster.

The leisure and hospitality supersector (NAICS supersector 70) had a 500-job drop in February.

Information (NAICS supersector 50), financial activities (NAICS supersector 55), and professional and business services (NAICS supersector 60) each cut back their respective staffs by 200 jobs.

Other services (NAICS supersector 80) rounded out February's employment dip with a 100-job loss.

*B. G. McKay*

Continued from page 3

Island to New Hampshire's 67.7 percent. Nationally, 55.5 percent of households owned computers.

Not only did more households in the state own computers in 2001, more were also travelling the "information super-highway". New Hampshire, with 61.6 percent of its households connected to the Internet in 2001, ranked second in the nation. Alaska ranked first with 64.1 percent. Nationally, 50.5 percent of households were using the Internet. The remaining New England States ranked in the top 20, ranging from Vermont in 14<sup>th</sup> place with 60.4 percent to Rhode Island in 17<sup>th</sup> place with 53.1 percent of its households using the Internet.

*Elisabeth Picard*

**Percent of Households Using Internet (Top 10 Plus New England States)**

Rank	State	1998	2001
	US	26.2	50.5
1	Alaska	44.1	64.1
2	New Hampshire	37.1	61.6
3	Washington	36.6	60.4
4	Colorado	34.5	58.5
5	Oregon	32.7	58.2
6	Maryland	31.0	57.8
7	New Jersey	31.3	57.2
8	Minnesota	29.0	55.6
9	California	30.7	55.3
10	Hawaii	27.9	55.2
11	Connecticut	31.8	55.0
13	Massachusetts	28.1	54.7
15	Vermont	31.8	53.4
16	Maine	26.0	53.3
17	Rhode Island	27.1	53.1

Source: *A Nation Online: How Americans are Expanding Their Use of the Internet*. February 2002. US Department of Commerce. (based on US Census Bureau's September 2001 Current Population Survey) Accessed March 11, 2003 <www.ntia.doc.gov/ntiahome/dn/index.html >

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