

New Hampshire ECONOMIC CONDITIONS

Maple Sugaring Season

March 2019

Job-to-Job Flows in New Hampshire – First Quarter 2017

New Hampshire businesses hired 50,275 workers during first quarter 2017. At the same time, over 49,215 workers separated from jobs with New Hampshire employers. Hires were led by businesses in the *Accommodation and food services* sector with 8,455 hires, while during the same period, over 7,540 workers separated from employment in the sector. Driven by the closing of the holiday shopping season, over 10,320 workers separated from *Retail trade* business in the first quarter of 2017, the highest number of separations among all sectors. *Retail trade* businesses hired 7,710 workers during the same period.

Job-to-job flows illustrate the churn of workers as they move from one job to another and from business to business. The job-to-job flows are a dataset compiled by the U.S. Census Bureau's Local Employment Dynamics Program. These statistics trace worker movements through industries, labor markets, and to/from nonemployment.¹

In New Hampshire, *Administrative and support and waste management and remediation services* establishments hired 6,240 workers, counterbalancing the 6,252 worker separations from the sector. The number of workers hired by businesses

INSIDE THIS ISSUE: Seasonally Adjusted Estimates

Unemployment Rates 6

Current Employment Statistics 6

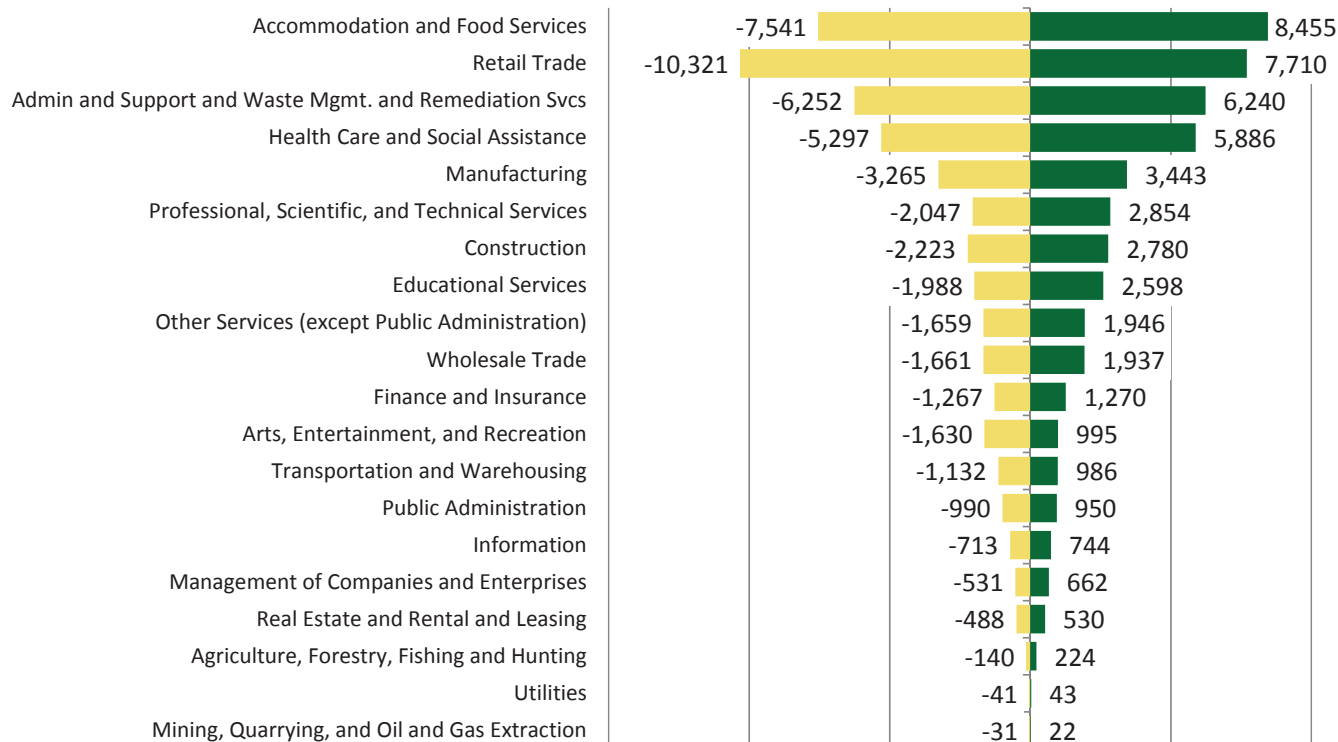
Not Seasonally Adjusted Estimates

Unemployment Rates 7

Current Employment Statistics 7

Claims Activity 11

Job-to-Job Flows in New Hampshire Businesses First Quarter 2017



Source: U.S. Census Bureau, Job-to-Job Flows, 1Q2017

■ Separations from NH Businesses by Industry
■ Hires to NH Businesses by Industry

¹ U.S. Census Bureau, Longitudinal Employer-Household Dynamics, Job-to-job flows, FAQ https://lehd.ces.census.gov/data/j2j_beta.html Nonemployment includes individuals who are unemployed and looking for work as well as individuals who are not working and not looking for work and are not in the labor force, such as students and retirees.

outweighed the number of worker separations in all but three of the remaining sectors; *Arts, entertainment, and recreation*; *Transportation and warehousing*; and *Public administration*.²

Dynamics of Job-to-Job Churning

In job-to-job statistics, a *worker* is an individual who receives earnings from a company in a quarterly time period. Some individuals do not separate from a job at one company to be hired at a job at another company, but separate and enter nonemployment. Nonemployment occurs when an individual has no earnings in a specific quarter.

Nonemployment differs from *unemployment* because these data do not identify if the individual is unemployed and looking for work or if they have left the labor force.

Workers moving from job-to-job who experience a very short or no time of unemployment between jobs indicate job changers who separate from one business to go work at another. Hires from

nonemployment include reentrants to the workforce as well as new entrants, i.e. college graduates or high school students without previous labor forces experience, as well as the unemployed.

Exploring Job-to-Job Churning

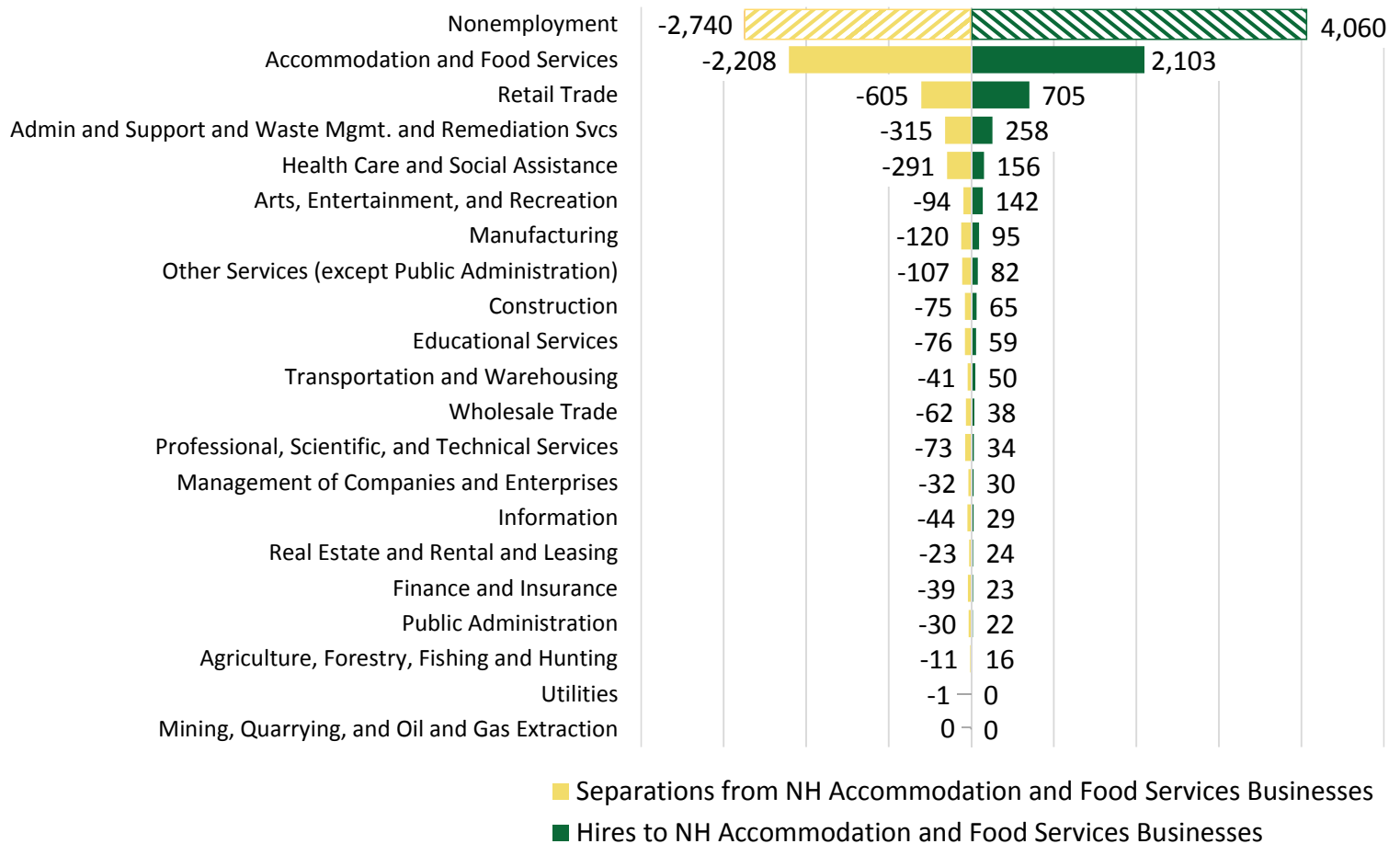
In New Hampshire, the four sectors with the highest volume of worker churning were *Accommodation and food services*, *Retail trade*, *Administrative and support and waste management and remediation services*, and *Health care and social assistance*.

Accommodation and Food Services

Accommodation and food services establishments accounted for 8.6 percent of total employment in New Hampshire during first quarter 2017, ranking as the fourth largest employing sector.³

By far the largest number, 4,060 hires by *Accommodation and food services* businesses, were from nonemployment. *Accommodation and food services* businesses hired 2,100 workers from other

Hires and Separations at New Hampshire Accommodation and Food Services Businesses — First Quarter 2017



Source: U.S. Census Bureau, Job-to-Job Flows, 1Q2017

² The Public administration sector is defined by the North American Industry Classification System (NAICS) as “consisting of establishments of federal, state, and local government agencies that administer, oversee, and manage public programs and have executive, legislative, or judicial authority over other institutions within a given area.” This sector does not include all government-owned establishments; government may own establishments in Health care and social assistance or Retail trade, for example.

³ Economic and Labor Market Information Bureau, NH Employment Security, Quarterly Census of Employment and Wages, 1Q2017.

⁴ U.S. Census Bureau, Longitudinal Employer-Household Dynamics, Job-to-job flows, https://lehd.ces.census.gov/data/j2j_beta.html

Accommodation and food services establishments. Another 700 workers previously employed at *Retail trade* businesses moved to jobs in *Accommodation and food services* firms.⁴

Over 2,700 workers separated from New Hampshire *Accommodation and food services* businesses and entered nonemployment. Another 2,200 workers separated from one New Hampshire *Accommodation and food services* business to work at another *Accommodation and food services* firms. Among workers separating from New Hampshire *Accommodation and food services* businesses, 600 workers entered employment in *Retail trade* businesses, 315 workers moved to employment in *Administrative and support and waste management and remediation services* firms, and almost 300 workers became employed in *Health care and social assistance* facilities.

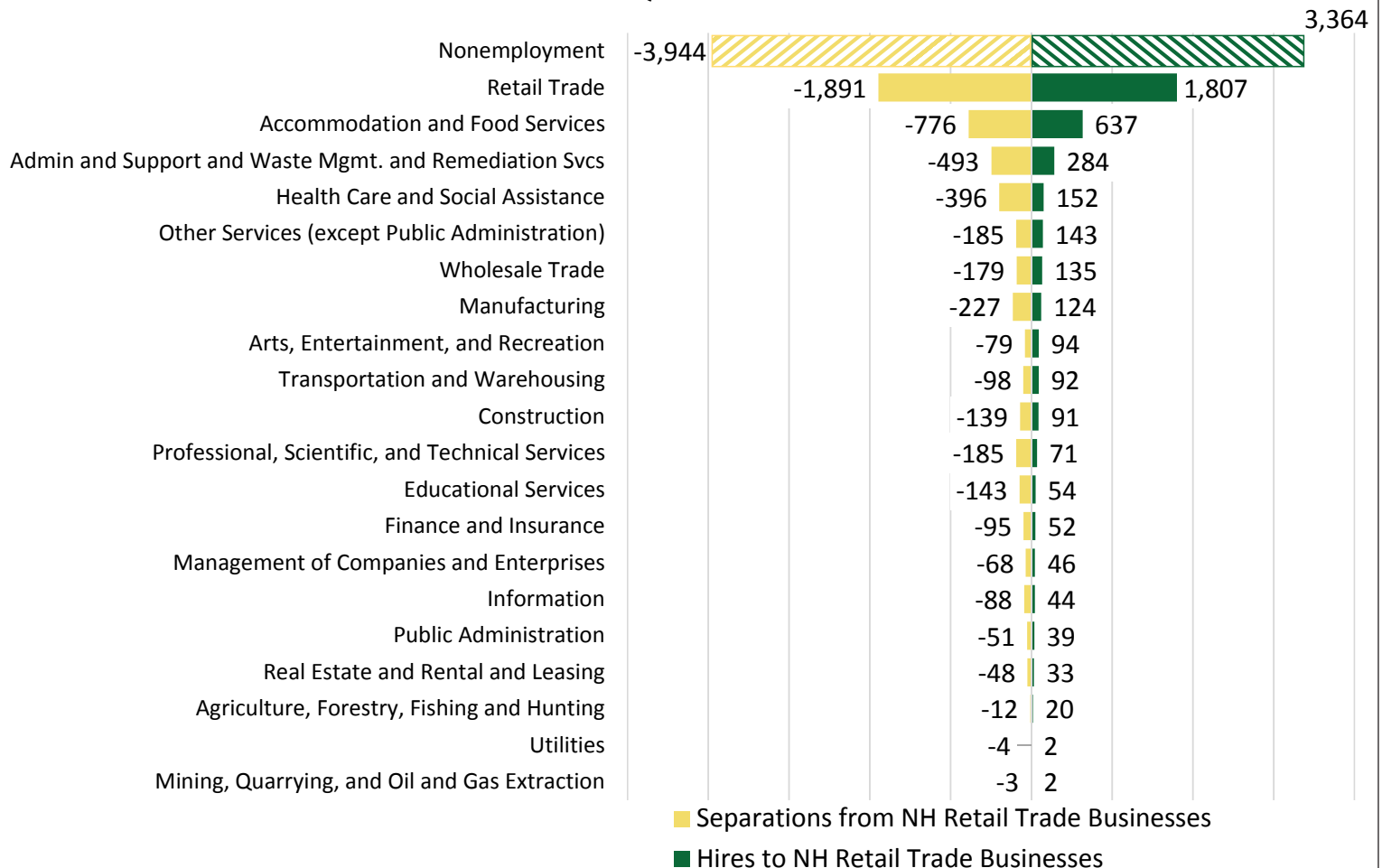
Retail Trade

Retail trade businesses accounted for 14.6 percent of total employment in New Hampshire in first quarter 2017, ranking as the largest employing sector.

Individuals hired from nonemployment accounted for 3,364 hires by *Retail trade* businesses in New Hampshire. Workers moving from one *Retail trade* business to employment in another *Retail trade* company made up the next largest number of hires with 1,800, followed by over 630 hires of workers from *Accommodation and food services* firms, and almost 300 hires came from *Administrative and support and waste management and remediation services* businesses.

Close to 4,000 workers separated from employment at *Retail trade* businesses and entered nonemployment. Almost 1,900 workers separated from one *Retail trade* business and entered employment at another *Retail trade* business, and another 780 workers entered employment at *Accommodation and food services* businesses. About 500 workers separating from *Retail trade* businesses entered employment at *Administrative and support and waste management and remediation services* firms, and 400 workers entered employment at *Health care and social assistance* facilities. Over 200 workers separating from *Retail trade* businesses entered employment at *Manufacturing* companies.

Job-to-Job Patterns of New Hampshire Retail Trade Businesses First Quarter 2017



Source: U.S. Census Bureau, Job-to-Job Flows, 1Q2017

Administrative and Support and Waste Management and Remediation Services

With employment of more than 33,000 workers, *Administrative and support and waste management and remediation services* businesses accounted for 5.2 percent of total employment in New Hampshire in first quarter 2017, ranking as the sixth largest employing sector in the state.

Administrative and support and waste management and remediation services businesses in New Hampshire had the third highest volume of employment churning during first quarter 2017. Hires of 2,200 individuals from nonemployment led the way, followed by 1,175 hires of workers from other *Administrative and support and waste management and remediation services* businesses. Another 456 hires were workers from *Retail trade* businesses, almost 350 workers were hired from *Manufacturing*, and 325 hires came from *Accommodation and food services* businesses.

Over 1,800 workers, the largest number of workers separating from *Administrative and support and waste management and remediation*

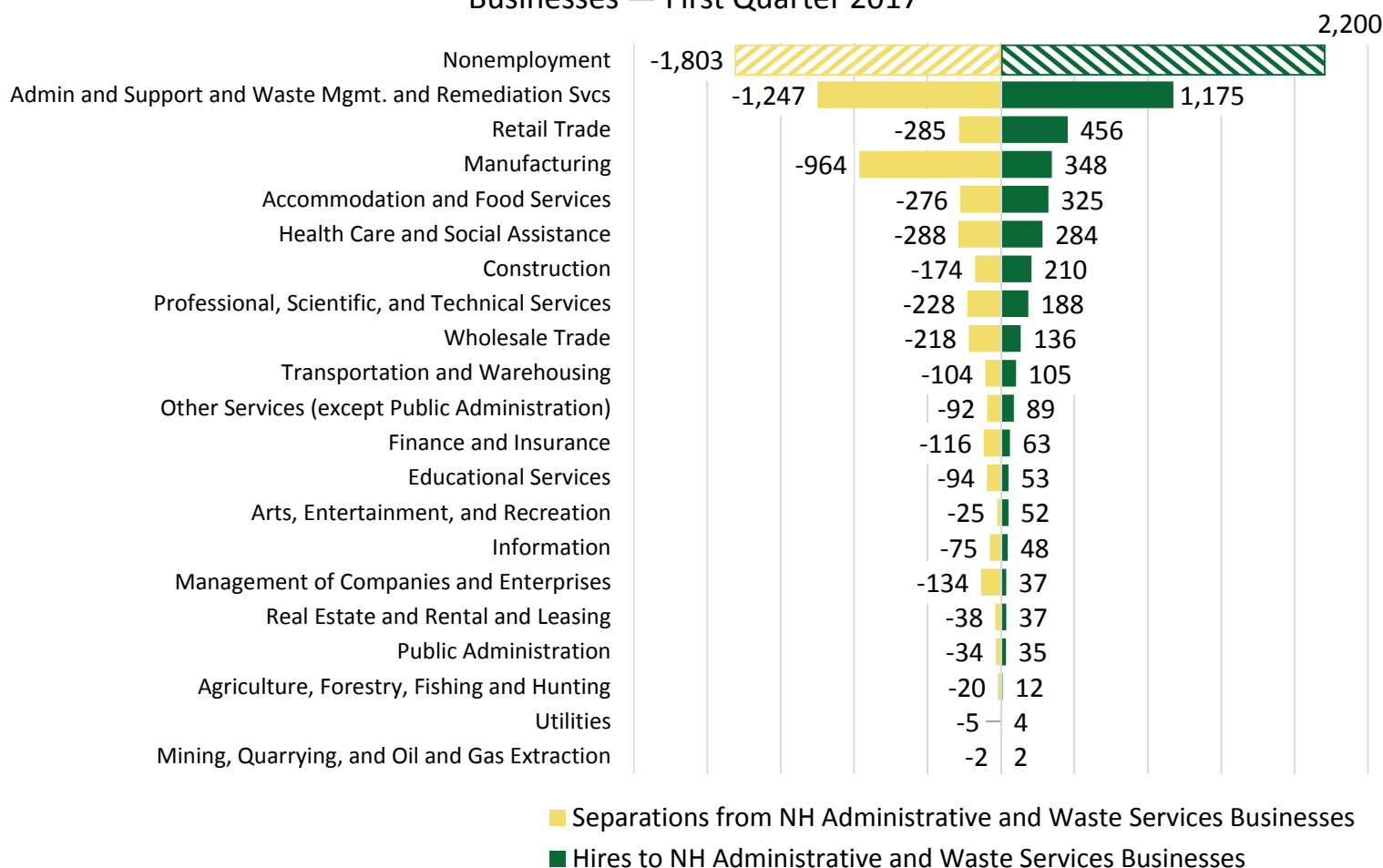
services businesses, entered nonemployment, while almost 1,250 others separated to enter employment at another *Administrative and support and waste management and remediation services* business. Almost 1,000 workers separated from *Administrative and support and waste management and remediation services* businesses to enter employment at *Manufacturing* businesses.

Health Care and Social Assistance

With over 90,800 workers in first quarter 2017, *Health care and social assistance* businesses accounted for 14.1 percent of total employment in the state, the second largest employing sector. *Health care and social assistance* businesses experienced the fourth highest volume of job-to-job churning in the state during first quarter 2017, with almost 5,900 hires and 5,300 worker separations.

Among workers hired by *Health care and social assistance* businesses in New Hampshire, almost 2,000 hires were from nonemployment, and 1,800 hires were from other *Health care and social assistance* businesses. Among workers hired from other sectors, 316 hires came from *Retail trade*, 279 hires came from *Accommodation and food*

Job-to-Job Patterns of New Hampshire Administrative and Waste Services Businesses — First Quarter 2017



Source: U.S. Census Bureau, Job-to-Job Flows, 1Q2017

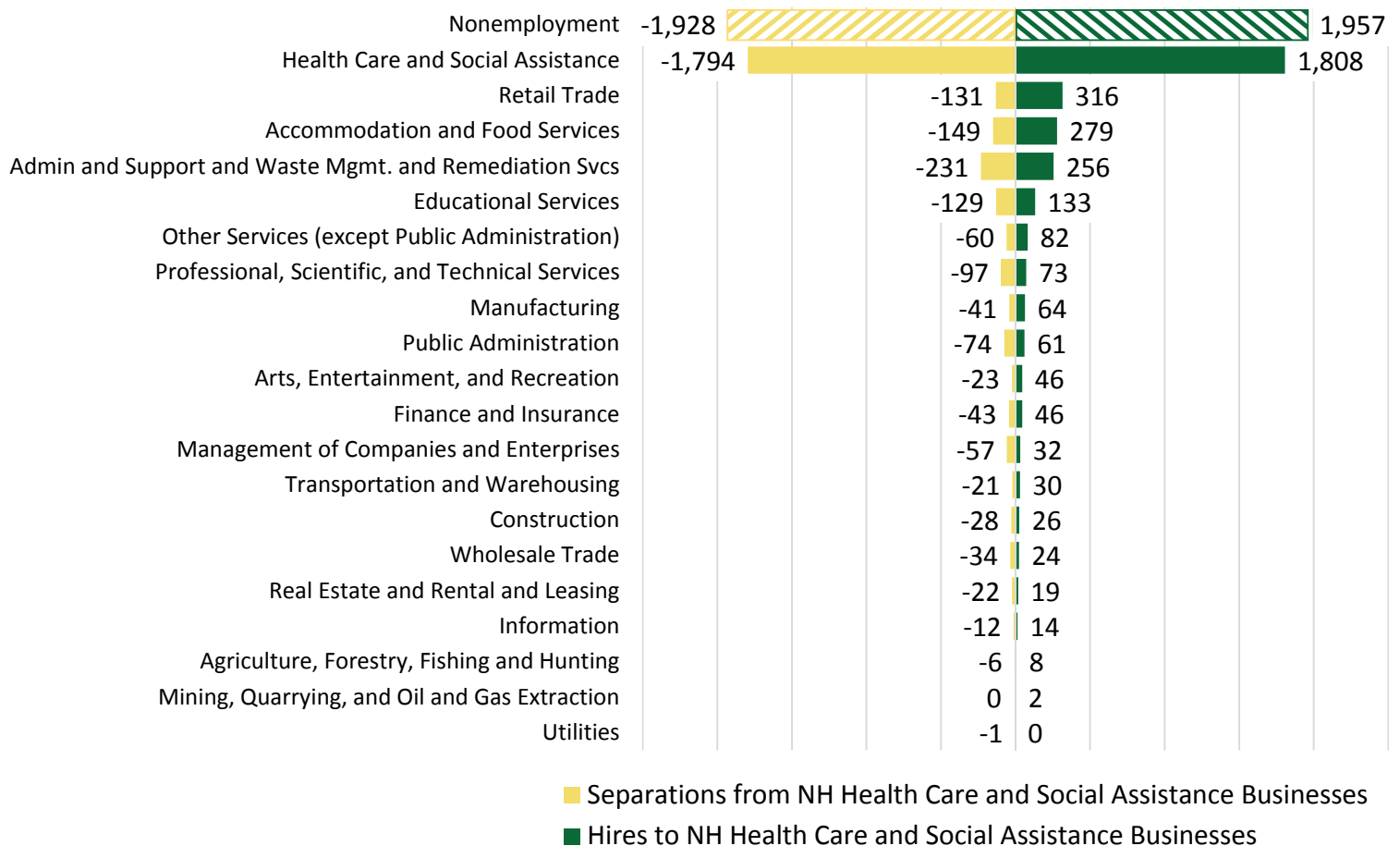
services, and 256 hires came from *Administrative and support and waste management and remediation services* businesses.

Of workers separating from *Health care and social assistance* facilities, over 1,900 separating workers entered nonemployment, while almost 1,800 workers entered employment at another *Health care and social assistance* business. Roughly 230 workers who separated from *Health care and social assistance* businesses started

employment at *Administrative and support and waste management and remediation services* businesses, 149 entered employment at *Accommodation and food services* businesses, and *Retail trade* and *Educational services* businesses were the destination sector for 130 separating workers each.

- Anita Josten, Economist

Job-to-Job Patterns of New Hampshire Health Care and Social Assistance Businesses — First Quarter 2017

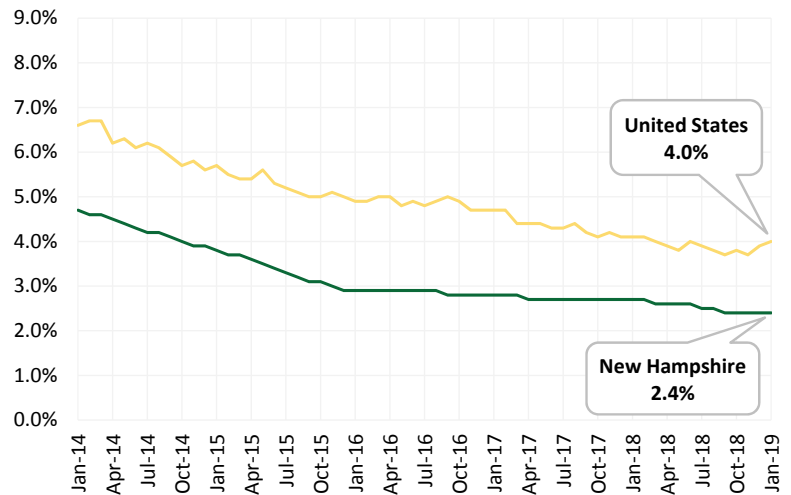


Source: U.S. Census Bureau, Job-to-Job Flows, 1Q2017

SEASONALLY ADJUSTED ESTIMATES

Unemployment Estimates by Region

Seasonally Adjusted	Jan-19	Dec-18	Jan-18
United States	4.0%	3.9%	4.1%
Northeast	3.8%	3.8%	4.3%
New England	3.3%	3.3%	3.7%
Connecticut	3.8%	3.8%	4.6%
Maine	3.5%	3.5%	3.2%
Massachusetts	3.1%	3.1%	3.6%
New Hampshire	2.4%	2.4%	2.7%
Rhode Island	4.0%	4.0%	4.4%
Vermont	2.5%	2.6%	2.7%
Mid Atlantic	4.0%	4.0%	4.6%
New Jersey	4.0%	3.9%	4.6%
New York	3.9%	3.9%	4.5%
Pennsylvania	4.1%	4.2%	4.6%

Local Area Unemployment Statistics (LAUS)
Unemployment Rate, NH and US

Current Employment Status (CES) by Place of Establishment

	Number of Jobs			Change From Previous	
	Jan-19	Dec-18	Jan-18	Month	Year
Total Nonfarm	684,800	683,700	679,300	1,100	5,500
Total Private	595,100	594,100	589,000	1,000	6,100
Mining and Logging	1,000	1,000	1,000	0	0
Construction	27,900	26,900	26,700	1,000	1,200
Manufacturing	70,200	70,800	69,500	-600	700
Durable Goods	52,500	52,900	51,700	-400	800
Non-Durable Goods	17,700	17,900	17,800	-200	-100
Trade, Transportation, and Utilities	140,300	139,100	139,600	1,200	700
Wholesale Trade	28,700	28,500	27,900	200	800
Retail Trade	94,600	93,700	95,100	900	-500
Transportation, Warehousing, and Utilities	17,000	16,900	16,600	100	400
Information	12,300	12,300	12,400	0	-100
Financial Activities	34,100	34,300	34,800	-200	-700
Financial and Insurance	27,200	27,300	27,600	-100	-400
Real Estate and Rental and Leasing	6,900	7,000	7,200	-100	-300
Professional and Business Services	83,300	83,500	83,000	-200	300
Professional, Scientific, and Technical Services	38,200	37,900	37,800	300	400
Management of Companies and Enterprises	9,100	8,900	9,200	200	-100
Administrative and Support and Waste Management and Remediation Services	36,000	36,700	36,000	-700	0
Education and Health Services	126,000	126,500	125,200	-500	800
Educational Services	32,900	33,400	33,500	-500	-600
Health Care and Social Assistance	93,100	93,100	91,700	0	1,400
Leisure and Hospitality	73,700	73,600	71,800	100	1,900
Arts, Entertainment, and Recreation	11,900	11,900	12,000	0	-100
Accommodation and Food Services	61,800	61,700	59,800	100	2,000
Other Services	26,300	26,100	25,000	200	1,300
Government	89,700	89,600	90,300	100	-600
Federal Government	8,100	7,900	7,700	200	400
State Government	24,000	24,000	24,800	0	-800
Local Government	57,600	57,700	57,800	-100	-200

*Current month
is preliminary;
past months
are revised*

Prior data and area data are available on our website at: www.nhes.nh.gov/elmi/statistics/ces-htm

NOT SEASONALLY ADJUSTED ESTIMATES BY PLACE OF RESIDENCE

Labor Force Estimates

New Hampshire	Jan-19	Dec-18	Jan-18
Total Civilian Labor Force	764,520	759,790	755,440
Employed	742,340	743,820	731,550
Unemployed	22,180	15,970	23,890
Unemployment Rate	2.9%	2.1%	3.2%

United States (# in thousands)	Jan-19	Dec-18	Jan-18
Total Civilian Labor Force	162,104	162,510	160,037
Employed	154,964	156,481	152,848
Unemployed	7,140	6,029	7,189
Unemployment Rate	4.4%	3.7%	4.5%

Unemployment Rates by Area

Counties	Jan-19	Dec-18	Jan-18
Belknap	3.1%	2.2%	3.3%
Carroll	3.1%	2.1%	3.1%
Cheshire	2.9%	2.1%	3.0%
Coös	4.1%	2.8%	4.3%
Grafton	2.4%	1.8%	2.4%
Hillsborough	2.9%	2.1%	3.2%
Merrimack	2.6%	1.8%	2.7%
Rockingham	3.2%	2.2%	3.4%
Strafford	2.6%	1.9%	2.7%
Sullivan	2.4%	1.8%	2.5%

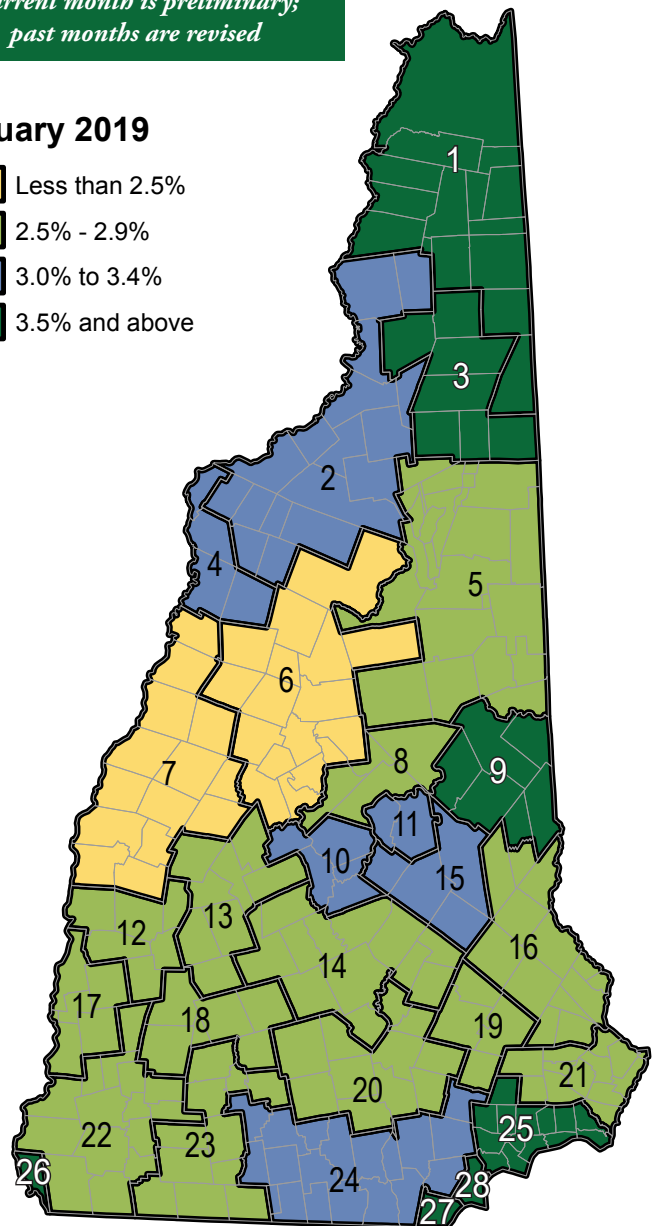
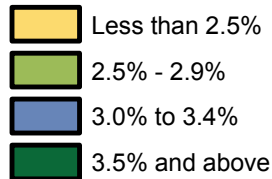
Map Key	Labor Market Areas	Jan-19	Dec-18	Jan-18
1	Colebrook, NH-VT LMA, NH Portion	3.7%	2.5%	4.4%
2	Littleton, NH-VT LMA, NH Portion	3.0%	2.2%	3.0%
3	Berlin NH Micropolitan NECTA	4.6%	3.2%	5.1%
4	Haverhill, NH LMA	3.2%	2.1%	3.4%
5	Conway, NH-ME LMA, NH Portion	2.8%	2.1%	2.8%
6	Plymouth, NH LMA	2.4%	1.8%	2.3%
7	Lebanon, NH-VT Micropolitan NECTA, NH Portion	2.1%	1.7%	2.1%
8	Meredith, NH LMA	2.7%	1.9%	3.2%
9	Wolfeboro, NH LMA	3.5%	2.3%	3.7%
10	Franklin, NH LMA	3.2%	2.2%	3.5%
11	Laconia, NH Micropolitan NECTA	3.3%	2.4%	3.2%
12	Expanded Claremont, NH estimating area	2.5%	1.8%	2.7%
13	New London, NH LMA	2.5%	1.8%	2.4%
14	Concord, NH Micropolitan NECTA	2.5%	1.8%	2.5%
15	Belmont, NH LMA	3.0%	2.1%	3.4%
16	Dover-Durham, NH-ME Metropolitan NECTA, NH Portion	2.6%	1.9%	2.7%
17	Charlestown, NH LMA	2.5%	1.8%	2.5%
18	Hillsborough, NH LMA	2.5%	1.9%	2.8%
19	Raymond, NH LMA	2.9%	2.0%	3.0%
20	Manchester, NH Metropolitan NECTA	2.7%	1.9%	2.9%
21	Portsmouth, NH-ME Metropolitan NECTA, NH Portion	2.6%	1.8%	2.8%
22	Keene, NH Micropolitan NECTA	2.7%	2.1%	2.9%
23	Peterborough, NH LMA	2.8%	2.0%	3.0%
24	Nashua, NH-MA NECTA Division, NH Portion	3.1%	2.3%	3.4%
25	Seabrook-Hampstead Area, NH Portion, Haverhill-Newburyport-Amesbury MA-NH NECTA Division	3.8%	2.6%	4.0%
26	Hinsdale Town, NH Portion, Brattleboro, VT-NH LMA	4.5%	3.3%	4.3%
27	Pelham Town, NH Portion, Lowell-Billerica-Chelmsford, MA-NH NECTA Division	3.8%	2.8%	4.3%
28	Salem Town, NH Portion, Lawrence-Methuen-Salem, MA-NH NECTA Division	4.0%	2.6%	4.0%

Unemployment Rates by Region

Not Seasonally Adjusted	Jan-19	Dec-18	Jan-18
United States	4.4%	3.7%	4.5%
Northeast	4.3%	3.5%	4.8%
New England	3.9%	2.9%	4.3%
Connecticut	4.7%	3.2%	5.2%
Maine	4.3%	3.4%	3.9%
Massachusetts	3.6%	2.7%	4.1%
New Hampshire	2.9%	2.1%	3.2%
Rhode Island	4.9%	3.8%	5.3%
Vermont	2.8%	2.3%	3.3%
Mid Atlantic	4.5%	3.8%	5.0%
New Jersey	4.6%	3.6%	5.0%
New York	4.6%	3.9%	5.0%
Pennsylvania	4.2%	3.9%	5.0%

*Current month is preliminary;
past months are revised*

January 2019



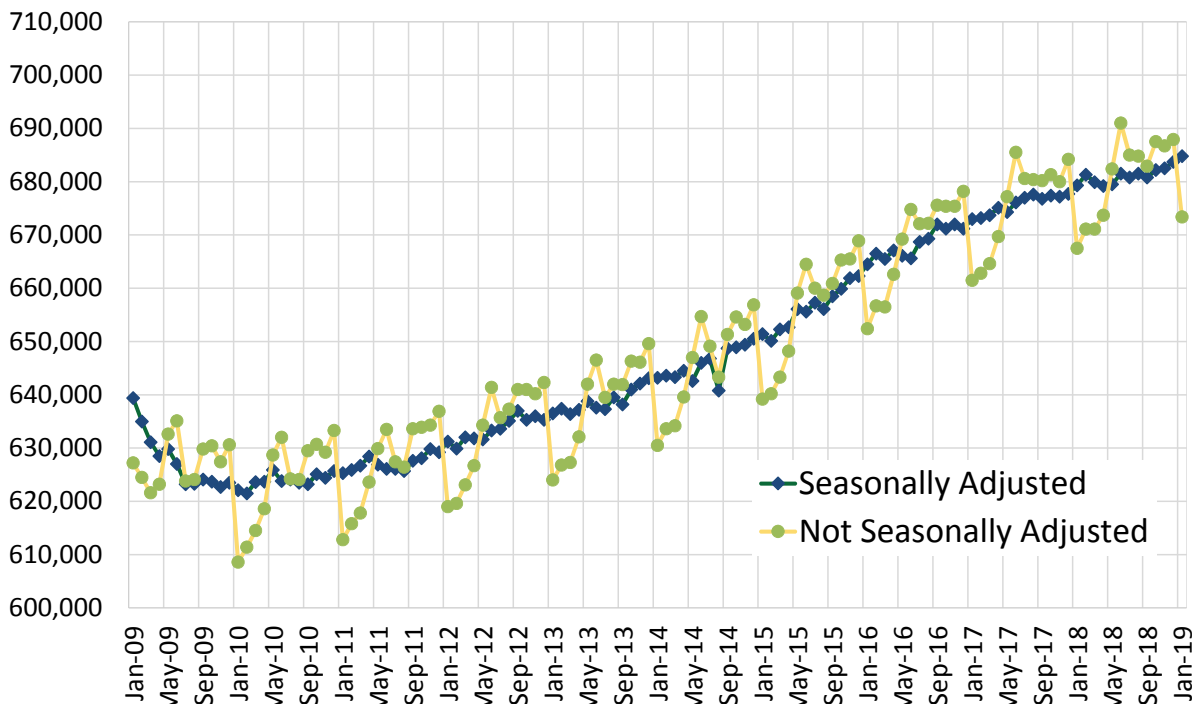
MONTHLY ESTIMATES BY PLACE OF ESTABLISHMENT

New Hampshire Nonfarm Employment Statewide
Not Seasonally Adjusted

*Current month
is preliminary;
past months
are revised*

	Number of Jobs			Change From Previous	
	Jan-19	Dec-18	Jan-18	Month	Year
Total Nonfarm	673,400	687,900	667,500	-14,500	5,900
Total Private	584,300	594,200	578,500	-9,900	5,800
Mining and Logging	900	1,000	900	-100	0
Construction	26,400	26,600	25,000	-200	1,400
Manufacturing	69,600	71,000	69,100	-1,400	500
Durable Goods	52,000	53,000	51,400	-1,000	600
Non-Durable Goods	17,600	18,000	17,700	-400	-100
Trade, Transportation, and Utilities	140,400	143,100	138,800	-2,700	1,600
Wholesale Trade	28,700	28,600	27,700	100	1,000
Retail Trade	95,000	96,800	94,700	-1,800	300
Transportation, Warehousing, and Utilities	16,700	17,700	16,400	-1,000	300
Information	12,300	12,300	12,400	0	-100
Financial Activities	33,900	34,400	34,400	-500	-500
Professional and Business Services	80,700	83,700	81,100	-3,000	-400
Education and Health Services	125,300	127,300	125,000	-2,000	300
Leisure and Hospitality	68,800	68,900	67,200	-100	1,600
Other Services	26,000	25,900	24,600	100	1,400
Government	89,100	93,700	89,000	-4,600	100
Federal Government	8,000	8,000	7,600	0	400
State Government	21,500	25,600	21,800	-4,100	-300
Local Government	59,600	60,100	59,600	-500	0

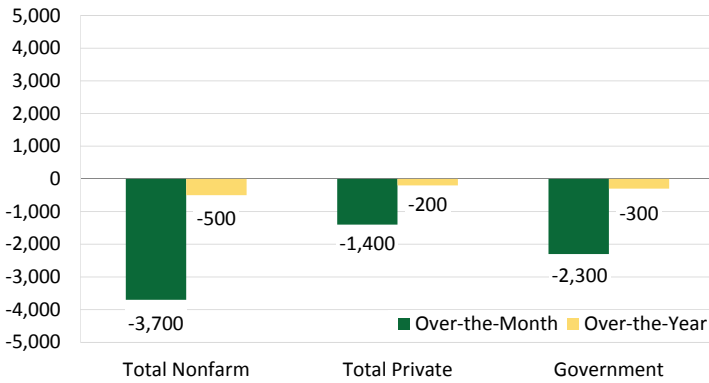
Total Nonfarm Employment Trend Through January 2019



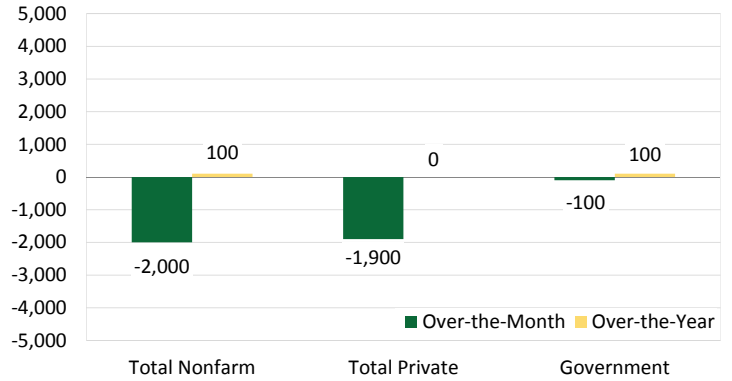
MONTHLY ESTIMATES BY PLACE OF ESTABLISHMENT

Nonfarm Employment by Metropolitan Statistical Areas - January 2019

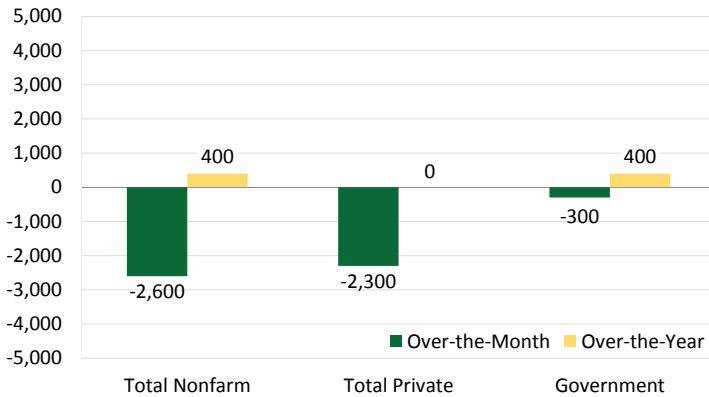
Dover-Durham NH-ME Metro NECTA



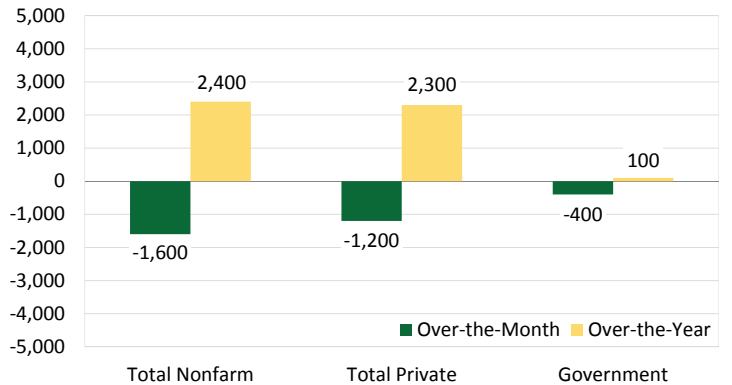
Manchester Metro NECTA



Portsmouth NH-ME Metro NECTA

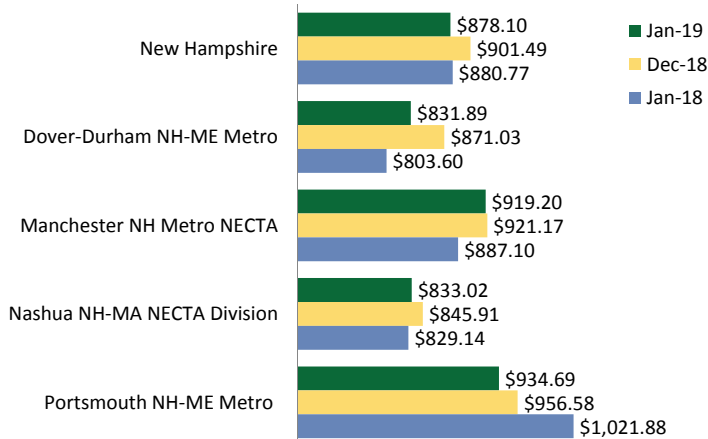


Nashua NH-MA NECTA Division

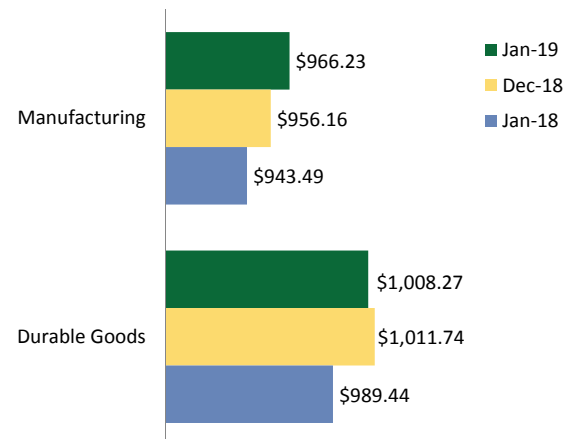


Total Private Average Weekly Earnings Data

All Employee Average Weekly Earnings



Production Workers Average Weekly Earnings



MONTHLY ANALYSIS OF CURRENT EMPLOYMENT STATISTICS (CES)

Seasonally Adjusted

Total Nonfarm employment increased by 1,100 jobs in January, according to preliminary seasonally adjusted estimates. *Trade, Transportation, and Utilities* had the largest over-the-month gain in employment, adding 1,200 jobs, followed by *Construction* with an increase of 1,000 positions. *Other Services* added 200 jobs, while *Leisure and Hospitality* and *Government* increased payrolls by 100 jobs each from December.

Four supersectors experienced over-the-month employment losses in January. *Manufacturing* dropped 600 jobs, while *Private Education and Health Services* lost 500 positions over-the-month. *Financial Activities* and *Professional and Business Services* decreased payrolls by 200 jobs each from December.

Seasonally adjusted *Total Nonfarm* employment increased 5,500 jobs from January 2018 to January 2019. *Leisure and Hospitality* expanded by 1,900 jobs, while *Other Services* added 1,300 jobs. *Construction* and *Private Education and Health Services* added 1,200 and 800 jobs, respectively, over-the-year. *Manufacturing* and *Trade, Transportation, and Utilities* grew by 700 positions each, and *Professional and Business Services* increased employment by 300 jobs from January 2018.

Three supersectors experienced over-the-year employment losses. *Financial Activities* dropped 700 jobs from January 2018. *Government* shed 600 positions, while *Information* decreased payrolls by 100.

Not Seasonally Adjusted

Preliminary unadjusted estimates for January show that *Total Nonfarm* employment decreased 14,500 jobs over-the-month. *Government* had the largest decrease, dropping 4,600 jobs. *Professional and Business Services* and *Trade, Transportation, and Utilities* decreased payrolls by 3,000 and 2,700 jobs, respectively, over-the-month, while *Private Education and Health Services* lost 2,000 jobs from December. *Manufacturing* decreased payrolls by 1,400 jobs, and *Financial Activities* lost 500 jobs. *Construction* experienced an employment decrease of 200 jobs, and Mining and Logging and *Leisure and Hospitality* dropped 100 positions each over-the-month.

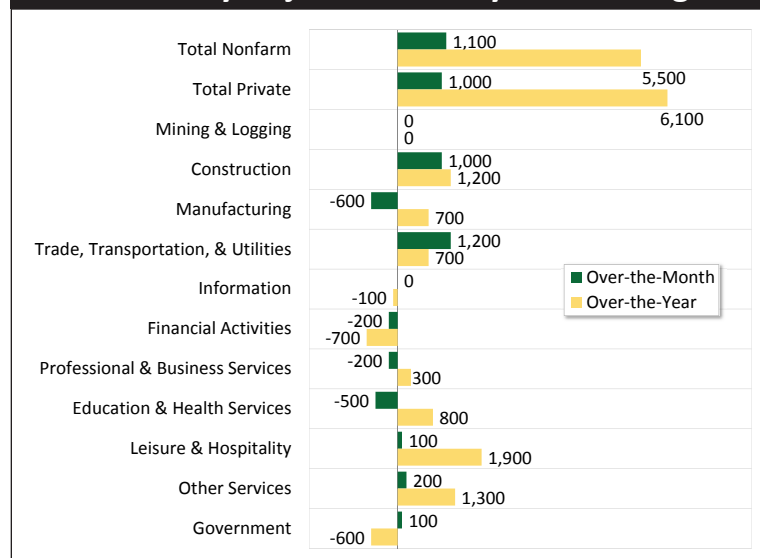
One supersector gained jobs over-the-month. *Other Services* experienced an employment increase of 100 jobs from December.

Total Nonfarm employment increased 5,900 jobs from January 2018 to January 2019. *Trade, Transportation, and Utilities* and *Leisure and Hospitality* gained 1,600 jobs each, while *Construction* and *Other Services* added 1,400 jobs each over-the-year. *Manufacturing* expanded by 500 positions, and *Private Education and Health Services* added 300 jobs from January 2018. *Government* increased employment by a modest 100 jobs over-the-year.

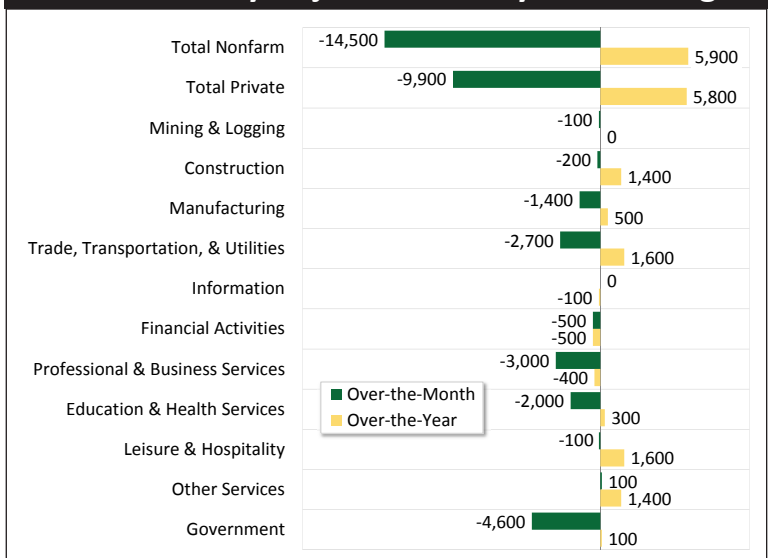
Three supersectors experienced an over-the-year employment loss. *Financial Activities* employment decreased by 500 positions from January 2018, while *Professional and Business Services* and *Information* lost 400 and 100 jobs, respectively, over-the-year.

Ellie Goodbread
Research Analyst

Seasonally Adjusted January 2019 Change



Not Seasonally Adjusted January 2019 Change



Consumer Price Index

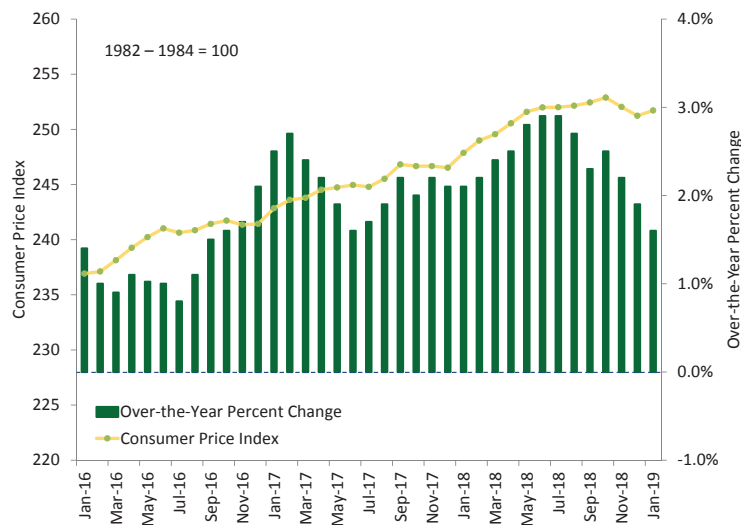
United States, All Urban Consumers
Not Seasonally Adjusted (CPI-U) (1982-1984=100)

			Change From Previous	
Jan-19	Dec-18	Jan-18	Month	Year
251.712	251.233	247.867	0.2%	1.6%

Northeast, All Urban Consumers
Not Seasonally Adjusted (CPI-U) (1982-1984=100)

			Change From Previous	
Jan-19	Dec-18	Jan-18	Month	Year
266.109	265.286	262.188	0.3%	1.5%

Consumer Price Index United States, All Urban Consumers



Unemployment Compensation Claims Activity

	Aug-18	Sep-18	Oct-18	Nov-18	Dec-18	Jan-19
Initial Claims	1,840	1,533	1,661	2,048	2,786	2,986
Continued Weeks Claimed	14,461	11,363	12,056	11,932	16,132	18,266
Average payment for a week of unemployment	\$327.56	\$350.71	\$352.60	\$343.71	\$335.16	\$328.92

New Hampshire Economic Conditions is published monthly in coordination with the Bureau of Labor Statistics and the Employment Training Administration of the U.S. Department of Labor.

To order publications, visit our website at: www.nhes/nh.gov/elmi, call 603-228-4124
or send a written request to the following address:

ELMI Publications
NH Employment Security
45 South Fruit Street
Concord, NH 03301-4857

NH Employment Security is a proud member of America's Workforce Network and NH Works.
NHES is an Equal Opportunity Employer and complies with the Americans with Disabilities Act.
Auxiliary aids and services are available upon request to individuals with disabilities.

New Hampshire Employment Security Local Offices

Berlin	752-5500	Claremont	543-3111
Concord	228-4100	Conway	447-5924
Keene	352-1904	Laconia	524-3960
Littleton	444-2971	Manchester	627-7841
Nashua	882-5177	Portsmouth	436-3702
Salem	893-9185	Somerset	742-3600

Claims calls: 1-800-266-2252



New Hampshire Employment Security Economic and Labor Market Information Bureau

General Information	(603) 228-4124 www.nhes.nh.gov/elmi
Research Unit	228-4173
Economist	229-4427
Covered Employment & Wages	228-4060
Current Employment Statistics	228-4175
Local Area Unemployment Statistics	228-4167
Occupational Employment Statistics	229-4315

