

Job-to-Job Flows in New Hampshire

New Hampshire businesses hired about 78,650 workers during second quarter 2015. At the same time, 57,735 workers separated from jobs with New Hampshire employers. Highlighted by the beginning of the summer season, hires were led by *Accommodation and food services* and *Retail trade*, with 15,850 and 12,537 hires, respectively. During the same period, over 9,000 workers separated from jobs in each of these two sectors.

These job-to-job flows illustrate the churn of workers, as they move from one job to another and from business to business. 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 Job-to-job flows include both workers leaving a job at a New Hampshire business to take a job at a business in any state, and workers taking a job at a New Hampshire business who left a job in any state.

For example, *Administrative and support and waste management and remediation services* establishments hired 9,145 workers in second quarter 2015, more than compensating for 6,485 worker separations. While hires and separations of workers at *Health care and social assistance* businesses

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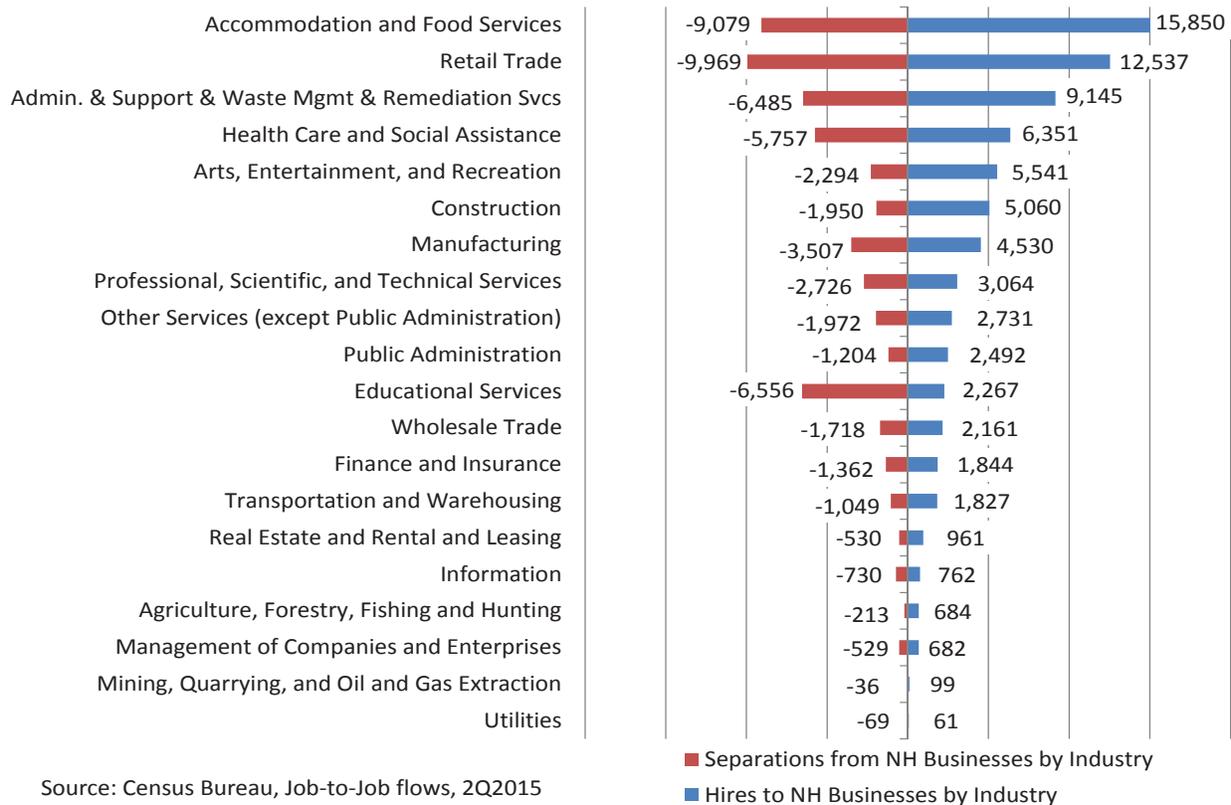
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were fairly balanced, workers hired at *Construction* businesses and *Arts, entertainment, and recreation* establishments far outpaced separations, clearly a seasonal effect of the beginning of summer.

Job-to-Job Flows in New Hampshire Businesses Second Quarter 2015



Source: Census Bureau, Job-to-Job flows, 2Q2015

¹ US 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.

On the other hand, the 6,556 separations from private *Educational services* businesses were driven by the closing of school facilities for the summer break.

Exploring Job-to-Job Churning in Four Sectors with the Largest Employment in New Hampshire

There were four industry sectors in New Hampshire that each held at least 10 percent of the private workforce during second quarter 2015:²

- *Retail trade*, with 17.1 percent;
- *Health care and social assistance*, with 16.0 percent;
- *Manufacturing*, with 12.2 percent; and
- *Accommodation and food services*, with 10.4 percent.

In job-to-job statistics, a *worker* is an individual who receives earnings from a company in the 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.³ Nonemployment differs from unemployment because these data do not identify if the individual is unemployed but looking for work or if they have left the labor force.

Workers moving from job-to-job who experience very short or no time of nonemployment between jobs indicate job changers who separate from one business to go work at another. Hires from nonemployment include reentrants to the labor force, new entrants, i.e., college graduates or high school students without previous labor force experience, as well as the unemployed.

Job-to-Job Flows at Retail Trade Businesses

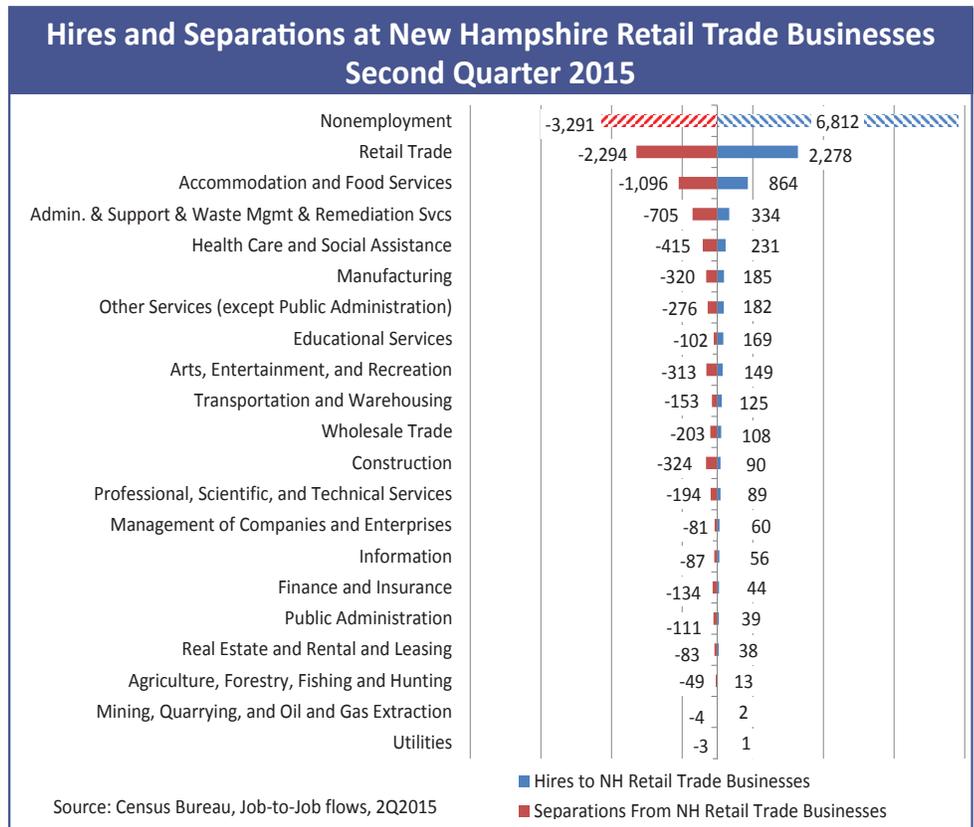
Retail trade establishments employed just over 17 percent of workers in New Hampshire’s privately-owned businesses in second quarter 2015.

By far, the most hires to *Retail trade* businesses in New Hampshire, 6,812 hires, were from nonemployment. This may have been influenced by students entering the labor force for the summer. *Retail trade* businesses hired 2,278 workers from other *Retail trade* businesses. Another 864 workers previously employed at *Accommodation and food services* businesses moved to jobs in New Hampshire *Retail trade* firms.⁴

Roughly 3,300 workers separated from New Hampshire *Retail trade*

businesses to enter nonemployment (*see technical note, footnote 3*). Almost 2,300 workers separated from New Hampshire *Retail trade* businesses to work at another *Retail trade* firm. The beginning of the summer season may have influenced the separations of workers from *Retail trade* to enter work in other sectors:

- 1,096 separating workers went to jobs in *Accommodation and food services*;
- 705 separating workers went to jobs in *Administrative and support and waste management and remediation services*;
- 324 separating workers took jobs in *Construction*; and
- 313 separating workers moved to jobs in *Arts, entertainment and recreation*.



² Economic and Labor Market Information Bureau, NH Employment Security, Quarterly Census of Employment and Wages, 2Q2015.

Note: data are not seasonally adjusted. www.nhes.nh.gov/elmi/statistics/qcew-quart-data.htm

³ Technical note: Data from all states were not available for 2Q2015, affecting data for separations to persistent nonemployment. Since the data for hires from persistent nonemployment in 2Q2014 were similar to those in 2Q2015; an assumption was made that data for separations to persistent nonemployment would be representative for discussion purposes. Data from 2Q2104 were substituted for separations to persistent nonemployment to maintain seasonality of the reporting period.

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

Interestingly, 415 workers from New Hampshire *Retail trade* businesses left to work at *Health care and social assistance* jobs, and 320 workers moved to jobs in *Manufacturing*. On the surface, this may not make sense as these sectors tend to be more specialized; however, one limitation of the data is the occupational details for workers are not available. For example, a cashier at a retail store could easily move into a cashier job at a hospital cafeteria, creating a job-to-job flow from *Retail trade* to *Health care and social assistance*.

Job-to-Job Flows at Health Care and Social Assistance Businesses

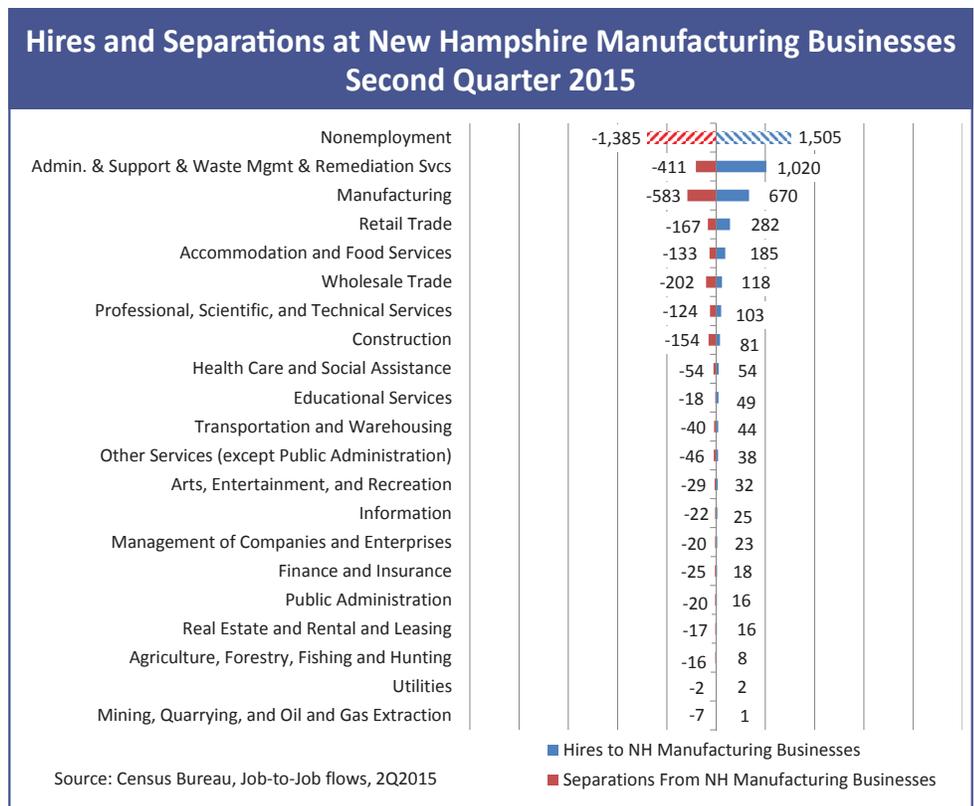
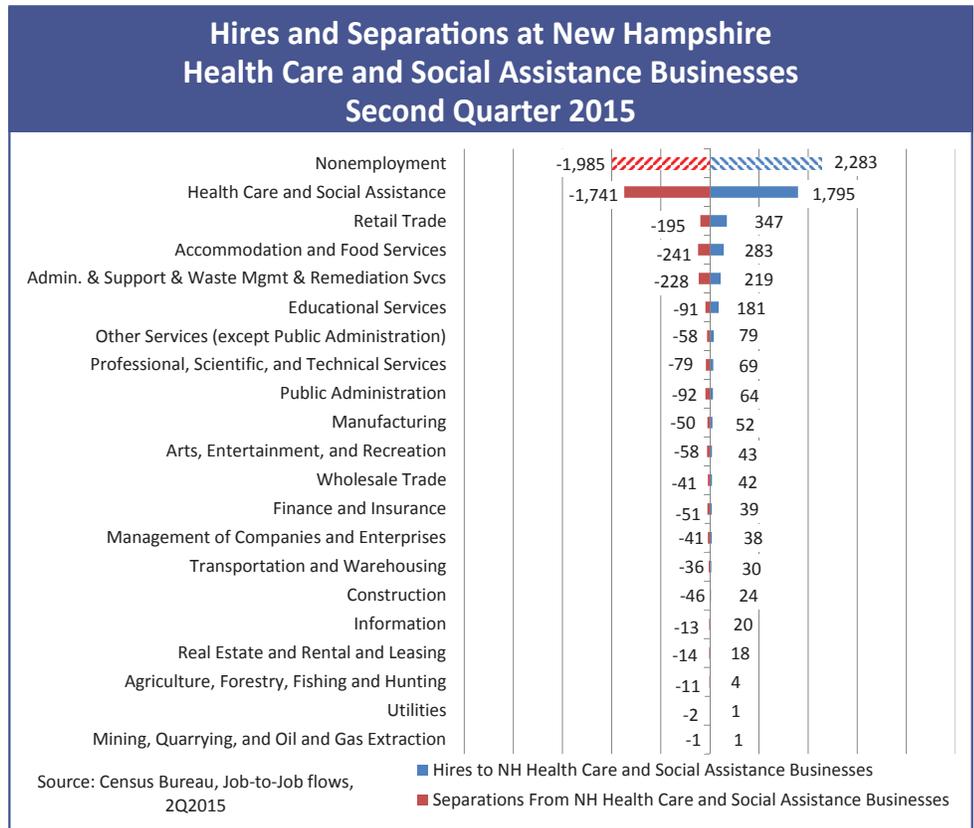
Health care and social assistance businesses accounted for 16.0 percent of New Hampshire private employment in second quarter 2015.

The hire of 2,283 individuals from nonemployment to jobs in New Hampshire *Health care and social assistance* firms outnumbered the 1,795 hires from other *Healthcare and social assistance* firms by fewer than 500 hires. Workers hired from all the other sectors combined totaled 1,554. This may reflect the specialty training necessary for many jobs in the *Health care and social assistance* sector.

Over 1,740 workers separated from New Hampshire *Health care and social assistance* firms to work at other *Health care and social assistance* businesses, while 1,985 workers entered nonemployment.⁵

Job-to-Job Flows at Manufacturing Businesses

Manufacturing accounted for roughly 67,200 workers during second quarter 2015, 12.2 percent of private employment in New Hampshire.



⁵ US Census Bureau, Longitudinal Employer-Household Dynamics, Job-to-job flows, FAQ https://lehd.ces.census.gov/data/j2j_beta.html

There was a unique difference between workers hired to New Hampshire *Manufacturing* businesses than hires to other industry sectors. While the largest number of hires, 1,505, was from nonemployment, the industry sector from which the most hires came was not *Manufacturing* but *Administrative and support and waste management and remediation services*, with 1,020 hires. This may speak to a large number of *Manufacturing* workers being hired from *Temporary employment services*, a subsector of the *Administrative and support and waste management and remediation services* sector. The third largest number, 670 hires, were from other *Manufacturing* firms.

Workers separating from *Manufacturing* firms more closely resembled separations from other industry sectors, with the largest number of separations, 1,385 workers, entering nonemployment, and 583 workers separating to go to other *Manufacturing* firms.

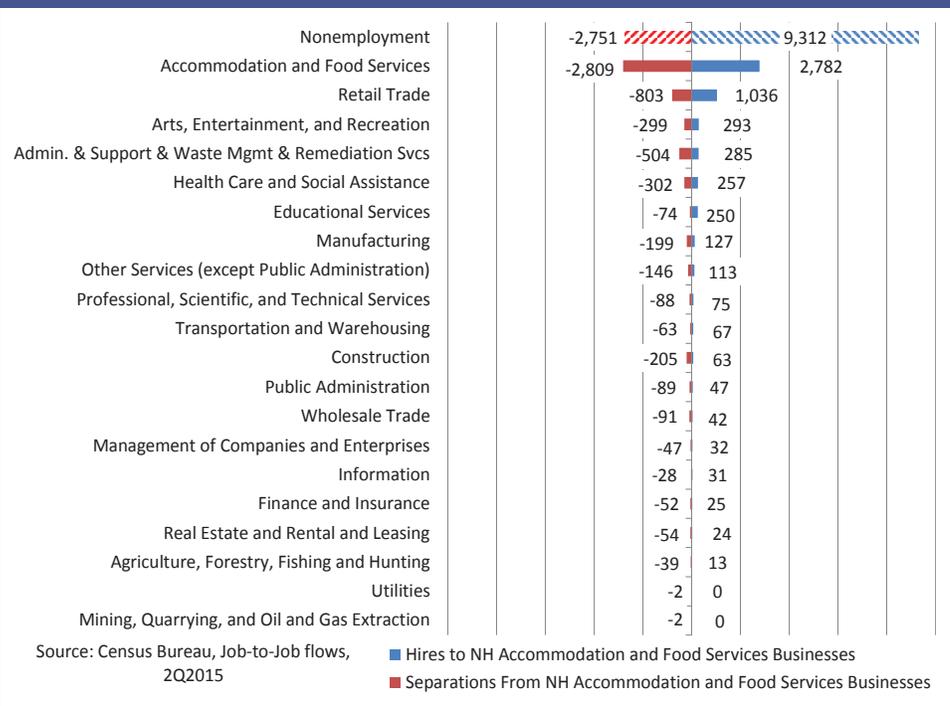
Job-to-Job Flows at Accommodation and Food Services Businesses

Employment in New Hampshire *Accommodation and food services* is highly seasonal, with hires usually spiking in the second quarter annually.⁶ Average quarterly employment in New Hampshire *Accommodation and food services* businesses was 57,400 jobs during second quarter 2015, accounting for 10.4 percent of private employment.

Over 9,300 hires to *Accommodation and food services* businesses were individuals from nonemployment. This may be in part from students entering the workforce for summer employment. Another 2,782 workers hired were from other *Accommodation and food services* businesses, and 1,036 came from *Retail trade* firms.

More workers separating from New Hampshire *Accommodation and food services* businesses went to other *Accommodation and food services* businesses than entered nonemployment, 2,809 separations versus 2,751 separations to nonemployment. Another 803 separations went to *Retail trade* firms.

Hires and Separations at New Hampshire Accommodation and Food Services Businesses Second Quarter 2015



Summary

There is value to tracking net change in employment over time. However, net change in employment does not assess the underlying dynamics of workers going from a job at one business to another job at another business. Job-to-job flow data illustrate the dynamics of worker churn between industries, such as manufacturing firms attracting workers from firms in other industries, as well as the industry of firms hiring from the pool of nonemployment. With New Hampshire’s low unemployment rate and related concerns about labor shortages, job-to-job flow data are a useful tool in discovering where hiring firms find workers.

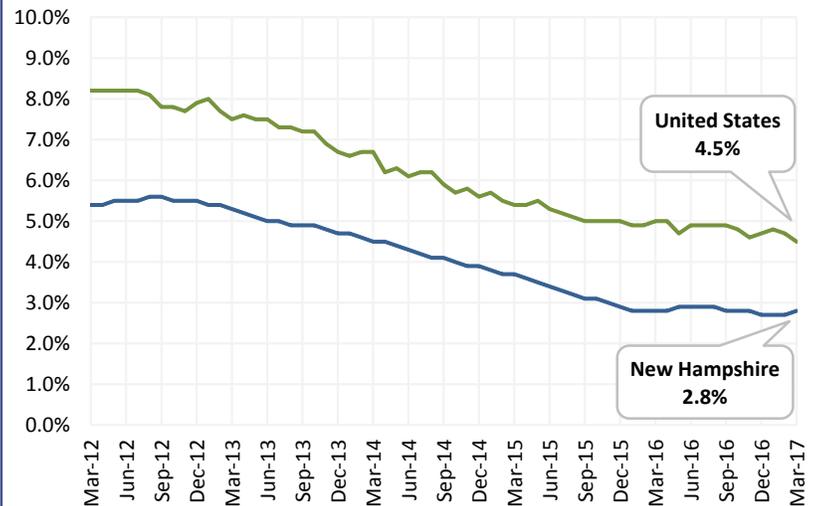
⁶ Local Employment Dynamics, US Census Bureau. <https://lehd.ces.census.gov/>

Seasonally Adjusted Estimates

Unemployment Estimates by Region

Seasonally Adjusted	Mar-17	Feb-17	Mar-16
United States	4.5%	4.7%	5.0%
Northeast	4.3%	4.4%	4.9%
New England	3.8%	3.7%	4.4%
Connecticut	4.8%	4.7%	5.4%
Maine	3.0%	3.2%	3.7%
Massachusetts	3.6%	3.4%	4.1%
New Hampshire	2.8%	2.7%	2.8%
Rhode Island	4.3%	4.5%	5.4%
Vermont	3.0%	3.0%	3.3%
Mid Atlantic	4.4%	4.6%	5.1%
New Jersey	4.2%	4.5%	5.1%
New York	4.3%	4.4%	4.8%
Pennsylvania	4.8%	5.0%	5.4%

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



Current Employment Statistics (CES) by Place of Establishment

	Number of Jobs			Change From Previous	
	Mar-17	Feb-17	Mar-16	Month	Year
Total Nonfarm	674,800	678,000	665,200	-3,200	9,600
Total Private	584,100	587,000	574,600	-2,900	9,500
Mining and Logging	1,000	1,000	1,000	0	0
Construction	27,100	27,600	25,500	-500	1,600
Manufacturing	68,300	68,300	67,900	0	400
Durable Goods	51,100	50,900	50,500	200	600
Non-Durable Goods	17,200	17,400	17,400	-200	-200
Trade, Transportation, and Utilities	139,600	140,900	139,800	-1,300	-200
Wholesale Trade	27,500	27,700	27,700	-200	-200
Retail Trade	95,200	96,100	96,100	-900	-900
Transportation, Warehousing, and Utilities	16,900	17,100	16,000	-200	900
Information	12,700	12,400	12,600	300	100
Financial Activities	36,800	37,200	36,800	-400	0
Finance and Insurance	29,700	30,100	30,000	-400	-300
Real Estate and Rental and Leasing	7,100	7,100	6,800	0	300
Professional and Business Services	78,400	78,300	77,400	100	1,000
Professional, Scientific, and Technical Services	34,500	34,200	33,700	300	800
Administrative and Support and Waste Management and Remediation Services	35,000	35,000	34,900	0	100
Education and Health Services	121,900	122,900	119,900	-1,000	2,000
Educational Services	30,800	31,400	30,800	-600	0
Health Care and Social Assistance	91,100	91,500	89,100	-400	2,000
Leisure and Hospitality	74,900	75,300	69,500	-400	5,400
Arts, Entertainment, and Recreation	13,400	13,500	11,400	-100	2,000
Accommodation and Food Services	61,500	61,800	58,100	-300	3,400
Other Services	23,400	23,100	24,200	300	-800
Government	90,700	91,000	90,600	-300	100
Federal Government	7,600	7,500	7,700	100	-100
State Government	25,700	25,800	24,800	-100	900
Local Government	57,400	57,700	58,100	-300	-700

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

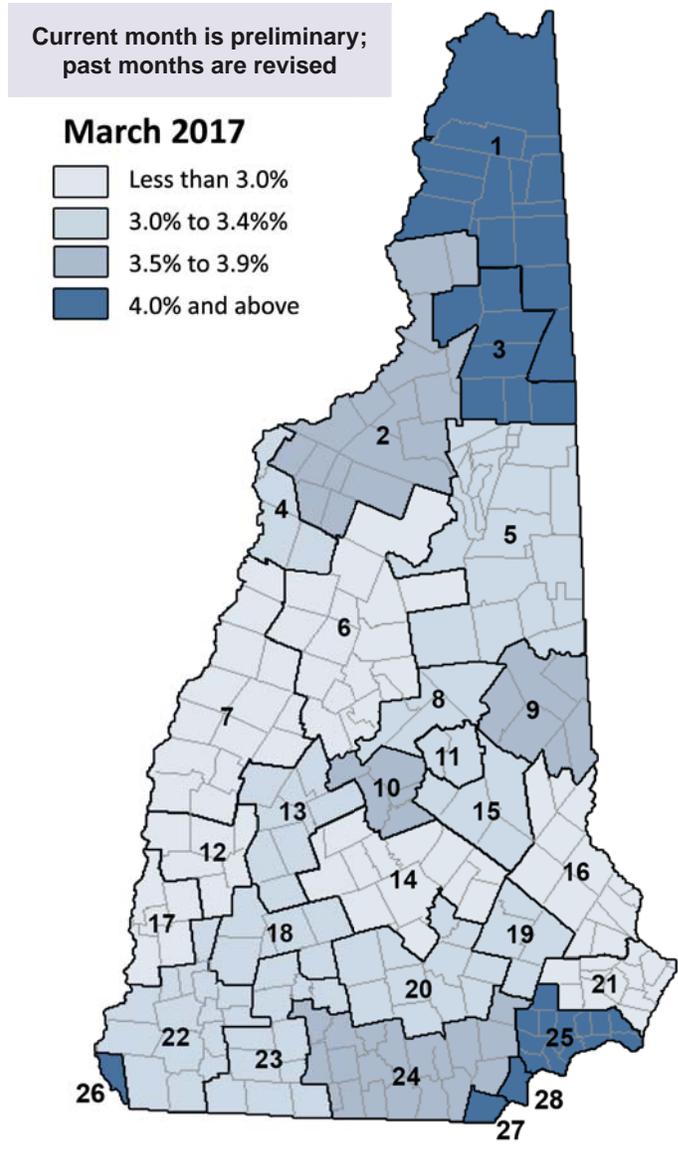
Not Seasonally Adjusted Estimates by Place of Residence

Labor Force Estimates			
New Hampshire	Mar-17	Feb-17	Mar-16
Total Civilian Labor Force	750,290	749,220	744,820
Employed	726,450	723,990	721,320
Unemployed	23,840	25,230	23,500
Unemployment Rate	3.2%	3.4%	3.2%
United States (# in thousands)	Mar-17	Feb-17	Mar-16
Total Civilian Labor Force	159,912	159,482	158,854
Employed	152,628	151,594	150,738
Unemployed	7,284	7,887	8,116
Unemployment Rate	4.6%	4.9%	5.1%

Unemployment Rates by Area			
Counties	Mar-17	Feb-17	Mar-16
Belknap	3.2%	3.6%	3.3%
Carroll	3.4%	3.5%	3.5%
Cheshire	3.2%	3.3%	3.0%
Coös	4.6%	4.7%	4.5%
Grafton	2.7%	2.9%	2.7%
Hillsborough	3.3%	3.5%	3.3%
Merrimack	2.9%	3.0%	2.8%
Rockingham	3.4%	3.6%	3.3%
Strafford	2.7%	2.9%	2.8%
Sullivan	2.7%	2.8%	2.6%

Map Key	Labor Market Areas	Mar-17	Feb-17	Mar-16
1	Colebrook, NH-VT LMA, NH Portion	4.8%	5.1%	4.2%
2	Littletton, NH-VT LMA, NH Portion	3.5%	3.7%	3.3%
3	Berlin NH Micropolitan NECTA	5.0%	5.2%	5.4%
4	Haverhill, NH LMA	3.4%	3.8%	3.5%
5	Conway, NH-ME LMA, NH Portion	3.2%	3.2%	3.4%
6	Plymouth, NH LMA	2.7%	3.0%	2.7%
7	Lebanon, NH-VT Micropolitan NECTA, NH Portion	2.4%	2.5%	2.4%
8	Meredith, NH LMA	3.2%	3.4%	3.4%
9	Wolfeboro, NH LMA	3.8%	3.9%	3.7%
10	Franklin, NH LMA	3.7%	4.0%	3.6%
11	Laconia, NH Micropolitan NECTA	3.3%	3.8%	3.4%
12	Claremont-Newport, NH LMA	2.7%	2.8%	2.6%
13	New London, NH LMA	3.0%	2.9%	2.7%
14	Concord, NH Micropolitan NECTA	2.6%	2.9%	2.7%
15	Belmont, NH LMA	3.3%	3.6%	3.3%
16	Dover-Durham, NH-ME Metropolitan NECTA, NH Portion	2.7%	2.9%	2.8%
17	Charlestown, NH LMA	2.6%	2.8%	2.8%
18	Hillsborough, NH LMA	3.0%	3.0%	2.9%
19	Raymond, NH LMA	3.0%	3.2%	3.3%
20	Manchester, NH Metropolitan NECTA	3.0%	3.2%	3.0%
21	Portsmouth, NH-ME Metropolitan NECTA, NH Portion	2.8%	2.9%	2.8%
22	Keene, NH Micropolitan NECTA	3.0%	3.2%	2.9%
23	Peterborough, NH LMA	3.3%	3.3%	3.3%
24	Nashua, NH-MA NECTA Division, NH Portion	3.5%	3.7%	3.4%
25	Seabrook-Hampstead Area, NH Portion, Haverhill-Newburyport-Amesbury MA-NH NECTA Division	4.1%	4.3%	4.0%
26	Hinsdale Town, NH Portion, Brattleboro, VT-NH LMA	4.0%	4.5%	3.7%
27	Pelham Town, NH Portion, Lowell-Billerica-Chelmsford, MA-NH NECTA Division	4.2%	4.5%	4.3%
28	Salem Town, NH Portion, Lawrence-Metuen-Salem, MA-NH NECTA Division	4.1%	4.3%	3.9%

Unemployment Rates by Region			
Not Seasonally Adjusted	Mar-17	Feb-17	Mar-16
United States	4.6%	4.9%	5.1%
Northeast	4.5%	4.9%	5.2%
New England	4.1%	4.4%	4.7%
Connecticut	5.1%	5.5%	5.9%
Maine	3.6%	3.9%	4.5%
Massachusetts	3.9%	4.2%	4.4%
New Hampshire	3.2%	3.4%	3.2%
Rhode Island	4.7%	5.1%	5.9%
Vermont	3.5%	3.4%	3.6%
Mid Atlantic	4.6%	5.1%	5.3%
New Jersey	4.3%	4.9%	5.4%
New York	4.4%	5.0%	5.1%
Pennsylvania	5.1%	5.4%	5.7%



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

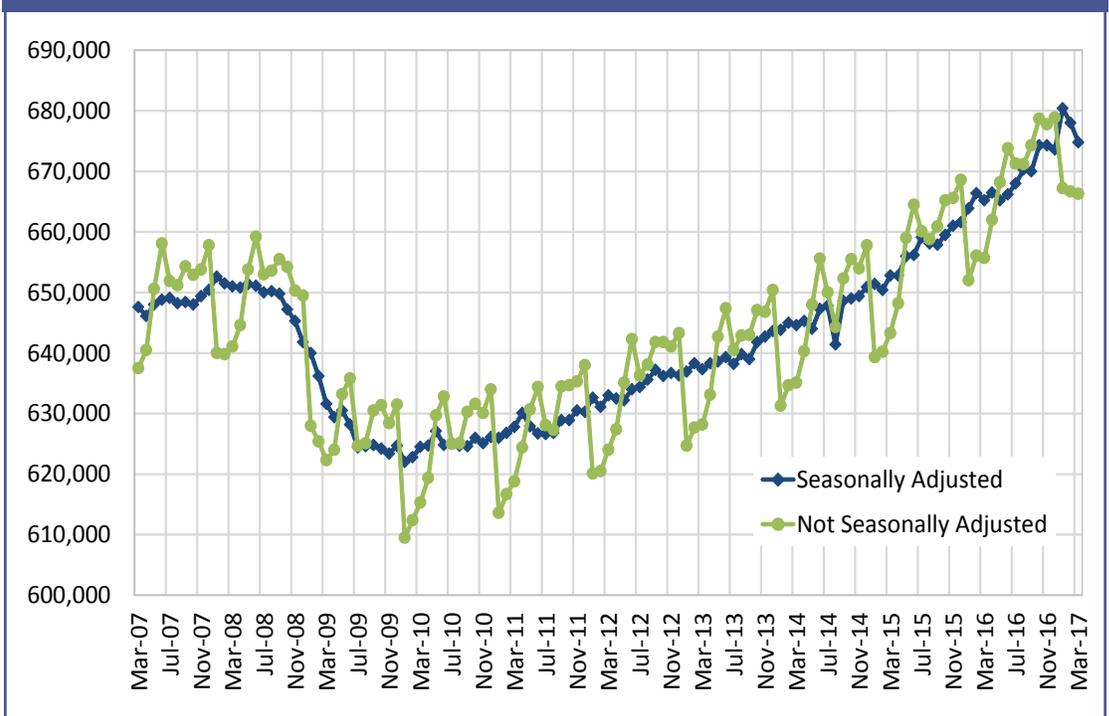
Monthly Estimates by Place of Establishment

New Hampshire Nonfarm Employment Statewide Not Seasonally Adjusted

Current month is preliminary; past months are revised

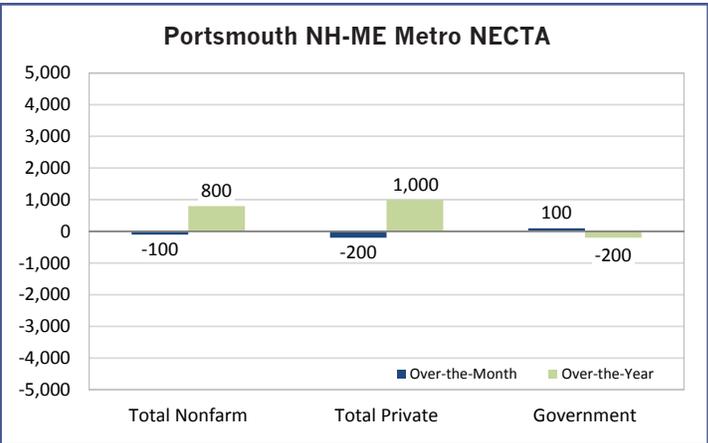
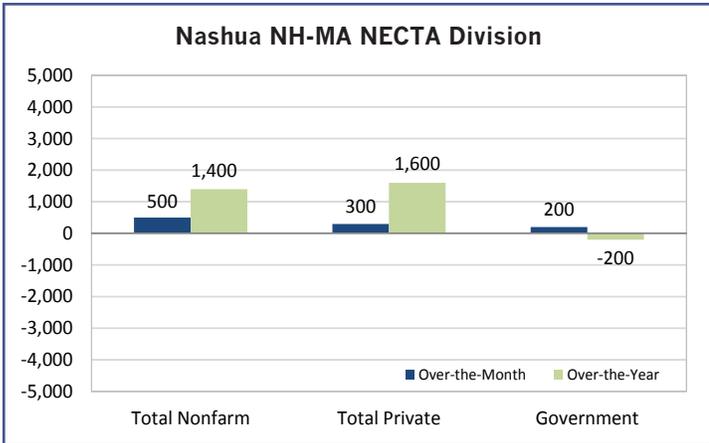
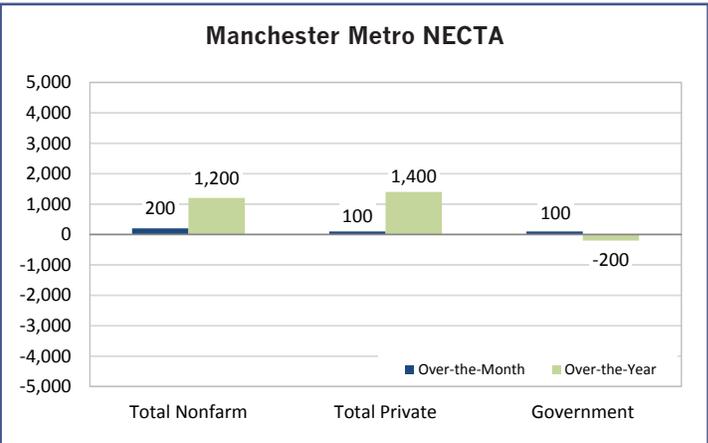
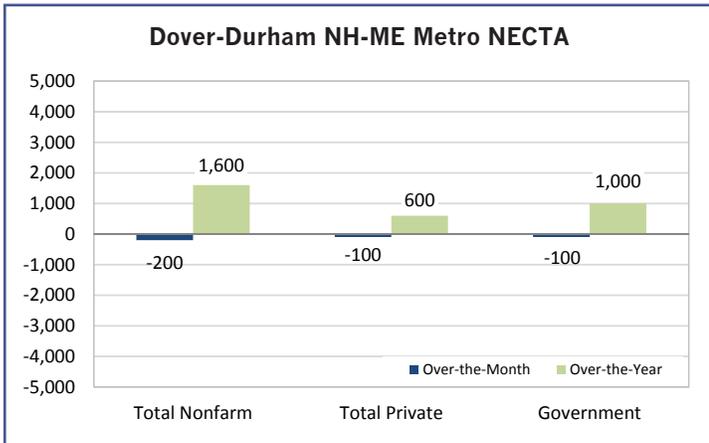
	Number of Jobs			Change From Previous	
	Mar-17	Feb-17	Mar-16	Month	Year
Total Nonfarm	666,300	666,700	655,700	-400	10,600
Total Private	571,300	571,800	561,400	-500	9,900
Mining and Logging	900	900	900	0	0
Construction	24,900	24,900	23,300	0	1,600
Manufacturing	67,900	67,800	67,400	100	500
Durable Goods	50,900	50,700	50,200	200	700
Non-Durable Goods	17,000	17,100	17,200	-100	-200
Trade, Transportation, and Utilities	136,200	136,700	136,700	-500	-500
Wholesale Trade	27,300	27,500	27,500	-200	-200
Retail Trade	92,400	92,700	93,500	-300	-1,100
Transportation, Warehousing, and Utilities	16,500	16,500	15,700	0	800
Information	12,600	12,400	12,500	200	100
Financial Activities	36,600	36,900	36,400	-300	200
Professional and Business Services	76,900	77,000	75,400	-100	1,500
Education and Health Services	123,100	123,400	120,500	-300	2,600
Leisure and Hospitality	69,000	69,000	64,500	0	4,500
Other Services	23,200	22,800	23,800	400	-600
Government	95,000	94,900	94,300	100	700
Federal Government	7,500	7,500	7,600	0	-100
State Government	27,000	27,100	26,000	-100	1,000
Local Government	60,500	60,300	60,700	200	-200

Total Nonfarm Employment Trend for March 2017

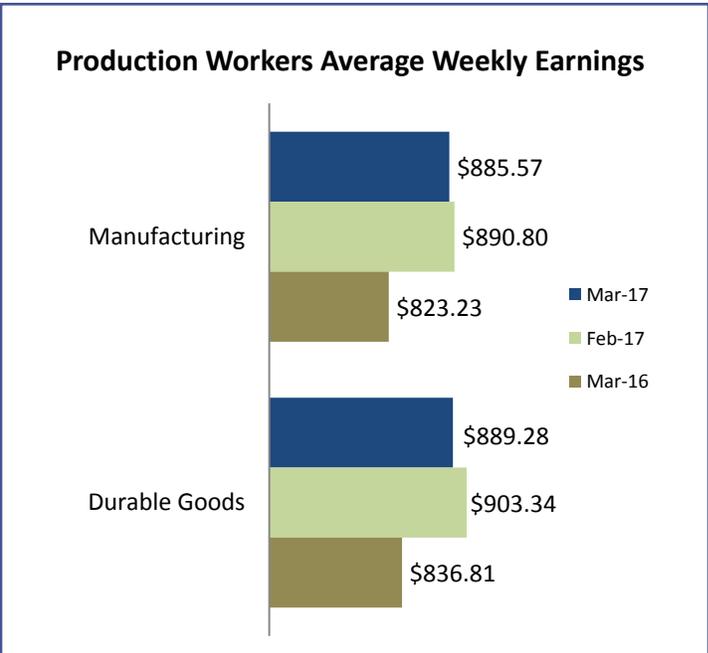
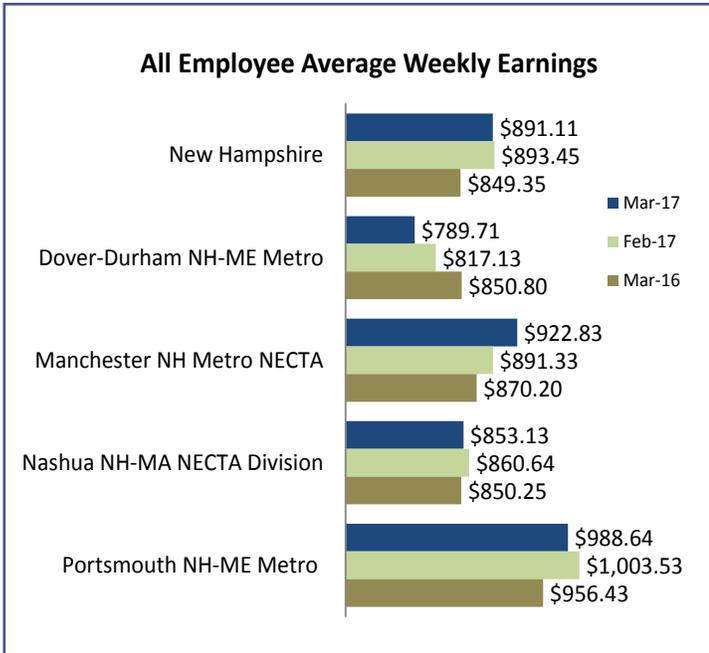


Not Seasonally Adjusted Estimates by Place of Establishment

Nonfarm Employment by Metropolitan Statistical Areas - March 2017



Total Private Average Weekly Earnings Data



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

Monthly Analysis of Current Employment Statistics (CES)

Seasonally Adjusted:

Total Nonfarm employment in New Hampshire decreased by 3,200 jobs in March, according to preliminary seasonally adjusted estimates.

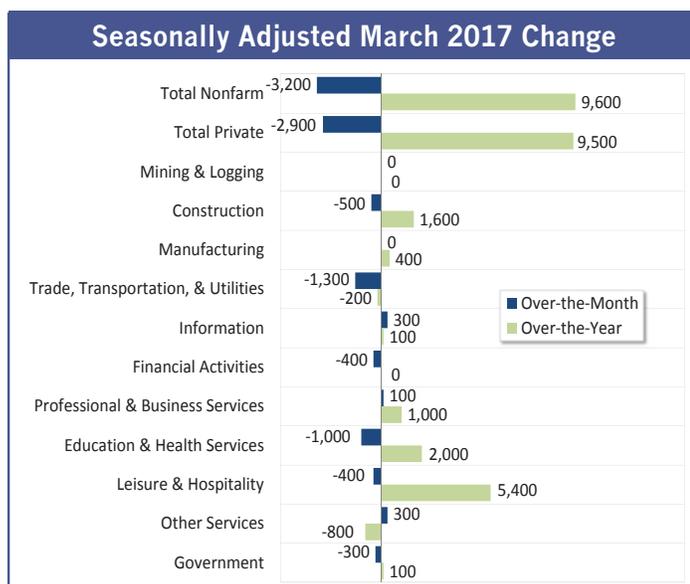
The drop in employment was driven mainly by *Trade, Transportation, and Utilities*, and *Private Education and Health Services*, decreasing payrolls by 1,300 and 1,000 jobs, respectively. *Construction* trimmed 500 jobs over-the-month, while *Financial Activities*, and *Leisure and Hospitality* each shed 400 positions over-the-month. *Government* employment fell by 300 from February to March.

Two supersectors, *Information* and *Professional and Business Services*, registered employment gains from February to March, adding 300 and 100 jobs, respectively.

Total seasonally adjusted Nonfarm employment increased by 9,600 from March 2016 to March 2017. *Leisure and Hospitality*, and *Private Education and Health Services* were the main drivers of the gain, adding 5,400 and 2,000 jobs, respectively. *Construction* establishments added 1,600 workers, while *Professional and Business Services* jobs increased by 1,000 over-the-year. *Manufacturing* employment grew by 400, while both *Information* and *Government* experienced a gain of 100 jobs each from March a year ago.

Other Services and *Trade, Transportation, and Utilities* were the only supersectors posting over-the-year employment losses, shedding 800 and 200 jobs, respectively.

Changes in seasonally adjusted data reflect underlying economic changes and allow for the comparison of different time periods.



Unadjusted:

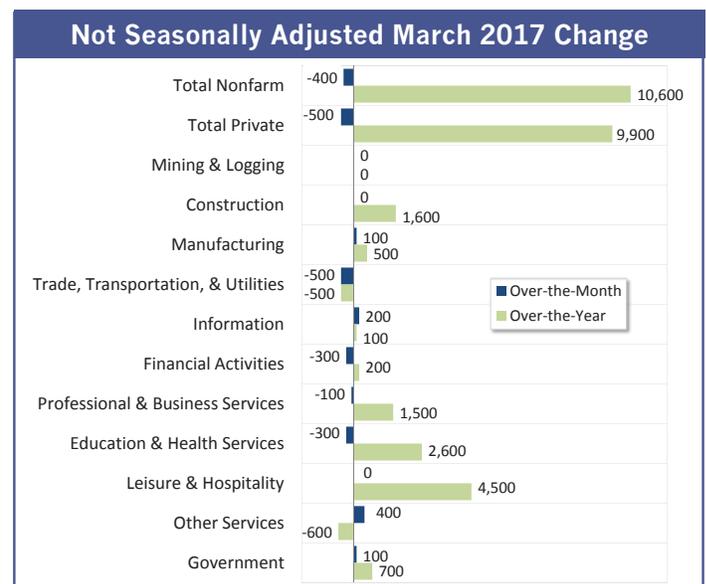
Preliminary unadjusted estimates for March show that Total Nonfarm employment contracted by 400 jobs. The supersectors contributing to the loss were *Trade, Transportation, and Utilities* dropping 500 jobs, *Financial Activities*, and *Private Education and Health Services*, each losing 300 jobs, and *Professional and Business Services* trimming 100 jobs.

Supersectors adding jobs over-the-month were *Other Services* with a gain of 400 positions, and *Information* posting a gain of 200 from February. The *Manufacturing* and *Government* supersectors each increased employment by 100 jobs from last month.

Total Nonfarm employment gained 10,600 jobs over-the-year, with the nearly half the increase coming from *Leisure and Hospitality*, expanding by 4,600 jobs. *Private Education and Health Services* added the second largest number of jobs with an increase of 2,600 from March of last year. *Construction*, and *Professional and Business Services* increased their payrolls by 1,600 and 1,500 jobs, respectively. *Government* employment rose by 700, while *Manufacturing* gained 500 jobs over-the-year. The *Financial Activities*, and *Information* supersectors experienced modest gains from a year ago of 200 and 100 jobs, respectively.

Other Services dropped 600 jobs from last March, while *Trade, Transportation, and Utilities* trimmed their payrolls by 500 over-the-year.

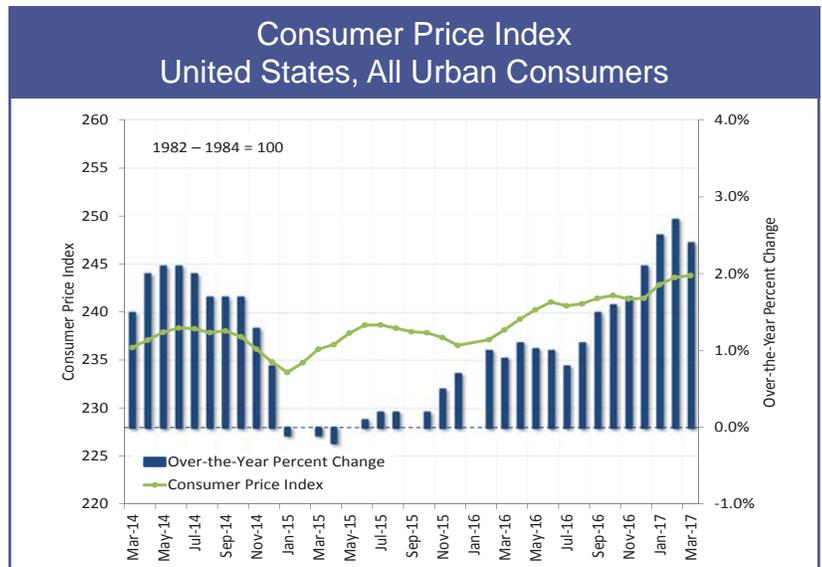
Changes in not seasonally adjusted data are due to seasonal patterns in hiring, as well as underlying economic changes.



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

Consumer Price Index				
United States, All Urban Consumers Not Seasonally Adjusted (CPI-U) (1982-1984=100)				
Mar-17	Feb-17	Mar-16	Change from Previous	
			Month	Year
243.801	243.603	238.132	0.1%	2.4%

Northeast, All Urban Consumers Not Seasonally Adjusted (CPI-U) (1982-1984=100)				
Mar-17	Feb-17	Mar-16	Change from Previous	
			Month	Year
258.510	258.768	252.854	-0.1%	2.2%



Unemployment Compensation Claims Activity						
	Oct-16	Nov-16	Dec-16	Jan-17	Feb-17	Mar-17
Initial Claims	2,247	2,593	3,954	3,775	2,803	2,713
Continued Weeks Claimed	15,192	14,552	16,876	24,348	20,110	20,268
Average payment for a week of unemployment	\$334.56	\$331.33	\$323.47	\$317.03	\$319.68	\$316.35

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

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New Hampshire Employment Security
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Keene 352-1904	Laconia 524-3960
Littleton 444-2971	Manchester 627-7841
Nashua 882-5177	Portsmouth 436-3702
Salem 893-9185	Somersworth 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 228-4177
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