

New Hampshire Economic Conditions

June 2016

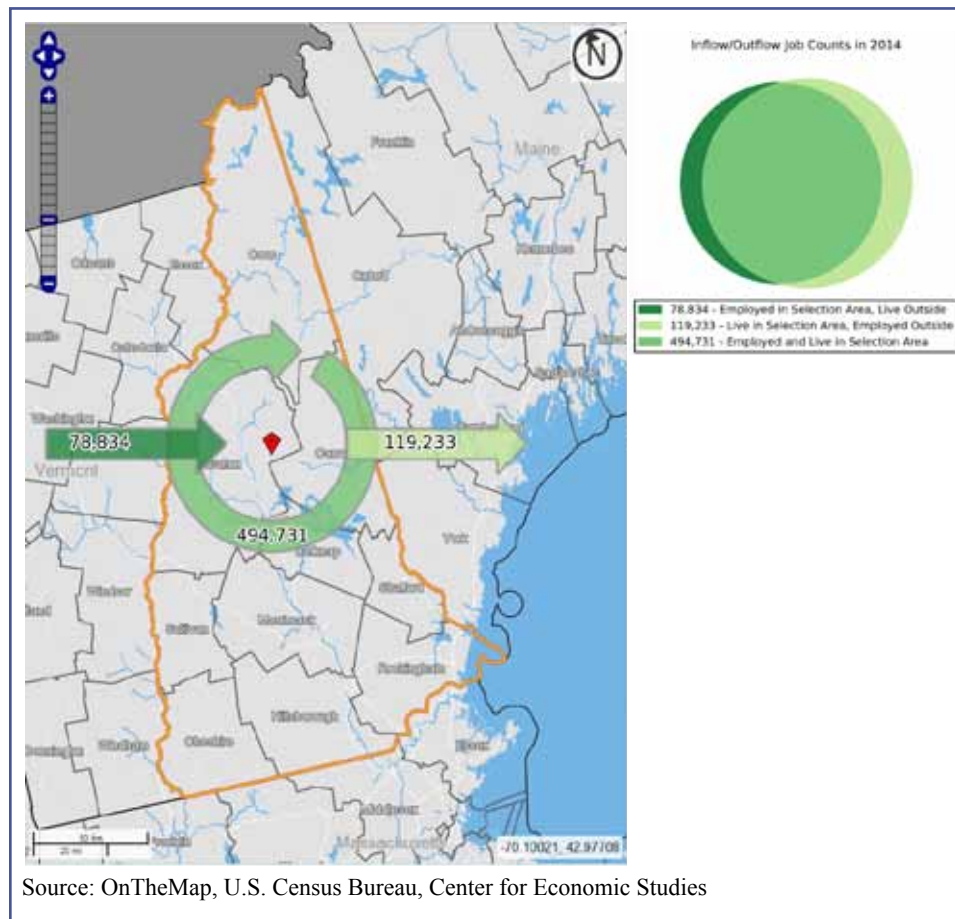
OnTheMap: New Hampshire Out-Commuters, 2014

In 2014, New Hampshire residents held 613,964 jobs in covered employment (excluding federal government jobs).¹ People who both lived and worked in New Hampshire held 494,731 such jobs, while 119,233 jobs were held by people who commuted out-of-state. In addition to workers who both lived and held a job in New Hampshire,

78,834 residents of other states commuted in to New Hampshire for work.²

New Hampshire has a large number of residents who commute out-of-state for work. OnTheMap data on persons living in a state but working outside that state show that 19.4 percent of New Hampshire residents in covered

employment commuted out-of-state for work. New Hampshire ranked second behind the District of Columbia, where 33.7 percent of job holders commuted out for work. The states with the largest percentage of job holders commuting out included Rhode Island, 19.2 percent; Maryland, 18.6 percent; and Delaware, 18.3 percent.³



Inflow/Outflow Job Counts (Primary Jobs) 2014

	Count	Share
Employed in the Selection Area (NH)	573,595	100.0%
Employed in the Selection Area (NH) but Living Outside	78,834	13.7%
Employed and Living in the Selection Area (NH)	494,731	86.3%
Living in the Selection Area (NH)	613,964	100.0%
Living in the Selection Area (NH) but Working Outside	119,233	19.4%
Living and Employed in the Selection Area (NH)	494,731	80.6%

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¹ Job counts are based on "primary jobs," defined as the job for each worker providing the most income. Jobs in covered employment are jobs with employers subject to unemployment compensation taxes, and excludes the self-employed and several categories of exempt jobs.

² U.S. Census Bureau, Center for Economic Studies, OnTheMap data.

³ In 2014, the New Hampshire labor force, including self-employed persons, averaged 740,609. The 119,233 persons commuting out of state to jobs in covered employment represented 16.1 percent of the labor force.

About OnTheMap

The March 2016 release of Version 6.5 of the OnTheMap application from the U.S. Census Bureau included for the first time data on Massachusetts workers and where they commute, as well as workers who commute into Massachusetts.⁴ Statewide commuter results are developed using worker and firm characteristics, employment and residential area comparisons, worker flows, and commuting patterns based on 2002-2014 LEHD (Longitudinal Employer-Household Dynamics) Origin-Destination Employment Statistics (LODES).⁵ LODES data include jobs covered by unemployment insurance - covered jobs. Federal employment will be included with the release of LODES Version 7.0.⁶

Local Employment Dynamics (LED) data define a job as a link between a worker and a firm at which the worker has

been employed during the reference quarter and during the quarter prior to that reference quarter. The reference quarter is Quarter 2 (April-May-June) of a given year of interest. This definition of “job” is sometimes called a “Beginning of Quarter” job because it is assumed that the worker was employed at that firm on the first day of the reference quarter. A *primary* job is defined as the one job (covered by unemployment insurance) for each worker that provides the most earnings. Analysis of primary jobs shows “one job per worker,” whereas analysis of “All Jobs” shows all the jobs held by the workers in the selected geographic area. The “All jobs” analysis separately counts all jobs held by persons with multiple jobs. LED data do not include the self-employed.

States Where Residents Commute to Work

Just over 80 percent of New Hampshire workers commute to a job in-state. For those traveling out-of-state to work, most commute to a bordering state - Massachusetts, Maine, or Vermont. The largest number, 93,810 New Hampshire residents, or 15.3 percent, worked in Massachusetts. Vermont was the workplace for 10,534 residents, 1.7 percent, and Maine was the workplace for 7,346 residents, or 1.2 percent. The remaining 1.2 percent traveled to other locations.

Nearby borders strongly affect the commuter relationship, as is further illustrated at the county level. Table 1 lists the share of residents who commute to bordering states from each county. Rockingham and Hillsborough counties had the largest shares of residents commuting to Massachusetts, while Cheshire and Sullivan counties had the largest shares commuting to Vermont. Though the shares of commuters working in Maine are small, Strafford, Carroll, and Coös counties had the largest shares of workers headed east. The two counties that do not share borders with another state, Merrimack and Belknap counties, had the largest shares of residents working in New Hampshire.

Table 1. State in Which New Hampshire Residents Work by Home County

County	NH	MA	VT	ME
Belknap	93.0%	3.5%	0.5%	1.8%
Carroll	89.1%	5.0%	0.6%	3.8%
Cheshire	81.2%	6.4%	10.5%	0.2%
Coös	87.9%	1.7%	6.0%	3.1%
Grafton	87.0%	2.0%	7.9%	1.7%
Hillsborough	78.0%	20.2%	0.2%	0.2%
Merrimack	93.2%	4.6%	0.5%	0.5%
Rockingham	69.5%	28.1%	0.1%	1.2%
Strafford	88.2%	6.2%	0.2%	4.2%
Sullivan	83.6%	4.7%	10.1%	0.3%
Statewide Total	80.6%	15.3%	1.7%	1.2%

Source: OnTheMap, U.S. Census Bureau, Center for Economic Studies

⁴ March 3, 2016: OnTheMap Version 6.5 and 2014 LODES Data Released <http://lehd.ces.census.gov/announcements.html#030316>

⁵ US Census Bureau, Longitudinal Employer-Household Dynamics, OnTheMap Help and Documentation, What is OnTheMap? http://lehd.ces.census.gov/applications/help/onthemap.html#what_is_onthemap

⁶ Includes civilian Federal workers, not including agencies that are redacted for security reasons. US Census Bureau, Longitudinal Employer-Household Dynamics, OnTheMap: Data Overview (LODES Version 7) <http://lehd.ces.census.gov/doc/help/onthemap/OnTheMapDataOverview.pdf>

Commuter Travel Distance

New Hampshire workers are generally mobile, and many people travel long distances from home to work. In each county, roughly two of every five workers travel less than ten miles to work. Hillsborough County has the largest share of workers traveling less than ten miles to work, and also the smallest share of workers traveling greater than 50 miles. Though Rockingham

and Hillsborough counties have the largest percentage of residents traveling to Massachusetts, the out-of-state employment did not necessarily mean a longer commute, as these two counties had the smallest shares of workers traveling greater than 50 miles to work.

Carroll County had the smallest share of workers traveling less than ten

miles to work, and the second-largest share of workers traveling greater than 50 miles. Coös County had an average share of workers traveling less than ten miles to work, but the northernmost county had the smallest share of both the 10 to 24 miles and 25 to 50 miles distances, and at the same time, had largest share of workers traveling greater than 50 miles.

Jobs by Distance

Home Census Block to Work Census Block

	Less than 10 miles	10 to 24 miles	25 to 50 miles	Greater than 50 miles
Belknap	38.6%	27.2%	22.4%	11.7%
Carroll	34.8%	21.3%	18.1%	25.8%
Cheshire	44.9%	24.5%	15.7%	14.9%
Coös	40.2%	17.4%	11.6%	30.8%
Grafton	44.4%	23.6%	13.8%	18.3%
Hillsborough	47.1%	31.1%	16.0%	5.8%
Merrimack	41.2%	31.4%	19.3%	8.1%
Rockingham	38.1%	36.2%	19.4%	6.4%
Strafford	40.7%	29.3%	21.7%	8.3%
Sullivan	37.7%	30.5%	15.0%	16.8%
Statewide	42.2%	30.6%	17.8%	9.4%

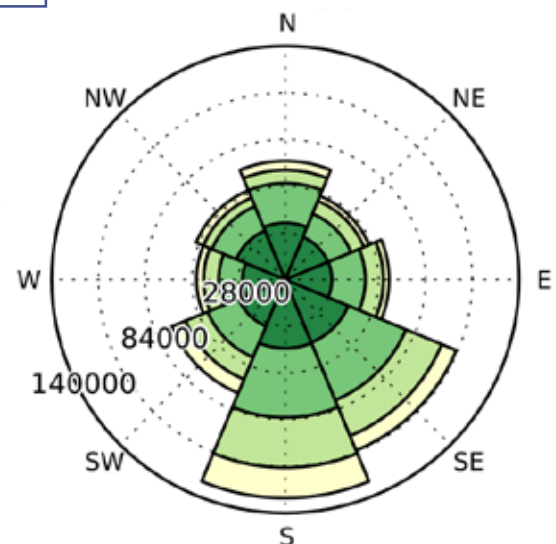
Source: OnTheMap, U.S. Census Bureau, Center for Economic Studies

Commuter Direction of Travel

The primary commute direction of workers in only three counties was not south. The majority of workers from seven counties, Belknap, Carroll, Coös, Grafton, Merrimack, Rockingham, and Stafford commuted directly south to their jobs. Strafford and Grafton counties had almost equally strong southeastern commute patterns, while southeast was the primary commuting direction for residents in Hillsborough County.

Statewide NH

Job Counts by
Distance/Direction – 2014
All Workers



The commute directions of workers in Grafton and Cheshire counties were the most diverse among the counties, but the primary direction of commuters in Cheshire County was to jobs in the east. Sullivan County was the only county that commuters primarily traveled to jobs in the north.

Overall, the distance and direction of commuters is relative to the home location. In general, commuters followed major corridors to job locations. If the home location is in proximity of the southern state boundary, even a short commute distance could easily land the worker

in Massachusetts, while commuters from the north could travel significant distances to the south and remain in state.

Direction of Travel

Home Census Block to Work Census Block

	North	Northeast	East	Southeast	South	Southwest	West	Northwest
Belknap	12.7%	7.1%	5.1%	12.9%	28.8%	15.7%	8.9%	8.7%
Carroll	12.2%	5.8%	4.5%	9.0%	37.3%	15.1%	8.1%	8.0%
Cheshire	15.2%	13.2%	19.5%	14.2%	8.5%	8.1%	8.4%	12.9%
Coös	9.4%	6.2%	4.7%	8.2%	38.6%	18.5%	9.1%	5.2%
Grafton	10.4%	7.6%	8.2%	16.1%	18.3%	14.0%	14.0%	11.4%
Hillsborough	14.5%	10.9%	13.2%	24.6%	17.2%	6.8%	5.8%	7.0%
Merrimack	9.3%	6.9%	10.3%	20.5%	27.5%	9.6%	6.6%	9.3%
Rockingham	8.5%	8.5%	7.7%	10.7%	23.0%	17.0%	12.3%	12.3%
Strafford	6.9%	5.2%	5.3%	24.1%	23.7%	17.7%	8.5%	8.5%
Sullivan	22.3%	9.3%	14.5%	16.9%	12.3%	8.5%	6.8%	9.4%
Statewide Total	11.6%	8.8%	10.1%	18.1%	21.3%	12.0%	8.7%	9.4%

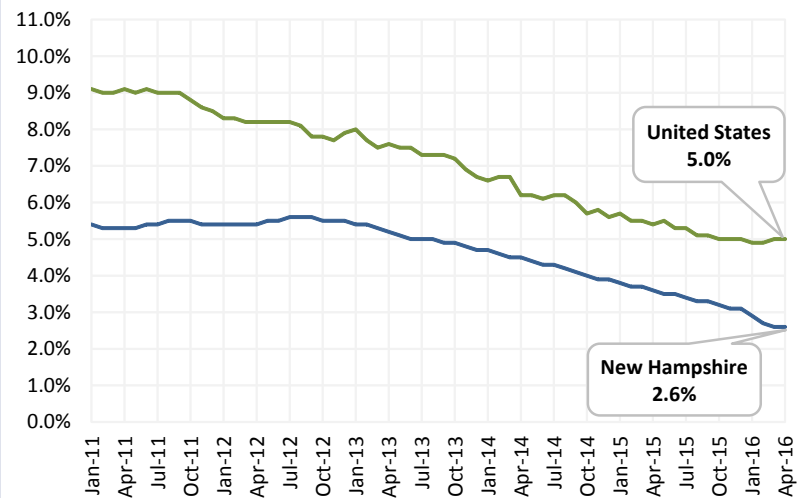
direction of travel with highest share of commuters per county

Seasonally Adjusted Estimates

Unemployment Estimates by Region

Seasonally Adjusted	Apr-16	Mar-16	Apr-15
United States	5.0%	5.0%	5.4%
Northeast	4.8%	4.7%	5.5%
New England	4.4%	4.5%	5.1%
Connecticut	5.7%	5.7%	5.8%
Maine	3.4%	3.4%	4.5%
Massachusetts	4.2%	4.4%	5.0%
New Hampshire	2.6%	2.6%	3.6%
Rhode Island	5.3%	5.4%	6.3%
Vermont	3.2%	3.3%	3.7%
Mid Atlantic	5.0%	4.8%	5.6%
New Jersey	4.7%	4.4%	6.0%
New York	4.9%	4.8%	5.5%
Pennsylvania	5.3%	4.9%	5.2%

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



Current Employment Statistics (CES) by Place of Establishment

	Number of Jobs			Change From Previous	
	Apr-16	Mar-16	Apr-15	Month	Year
Total Nonfarm	663,500	664,900	654,800	-1,400	8,700
Total Private	574,600	575,400	563,800	-800	10,800
Mining and Logging	1,000	900	1,000	100	0
Construction	25,100	25,700	23,700	-600	1,400
Manufacturing	66,700	65,900	67,000	800	-300
Durable Goods	50,000	49,500	50,100	500	-100
Non-Durable Goods	16,700	16,400	16,900	300	-200
Trade, Transportation, and Utilities	141,300	140,600	137,800	700	3,500
Wholesale Trade	28,100	28,300	27,500	-200	600
Retail Trade	97,800	96,500	95,100	1,300	2,700
Transportation, Warehousing, and Utilities	15,400	15,800	15,200	-400	200
Information	12,600	12,700	12,300	-100	300
Financial Activities	36,600	36,600	35,100	0	1,500
Finance and Insurance	29,500	29,600	28,500	-100	1,000
Real Estate and Rental and Leasing	7,100	7,000	6,600	100	500
Professional and Business Services	77,500	77,100	75,900	400	1,600
Professional, Scientific, and Technical Services	34,800	34,000	33,100	800	1,700
Administrative and Support and Waste Management and Remediation Services	34,700	34,900	34,200	-200	500
Education and Health Services	119,400	119,700	117,500	-300	1,900
Educational Services	31,300	31,100	29,700	200	1,600
Health Care and Social Assistance	88,100	88,600	87,800	-500	300
Leisure and Hospitality	67,800	69,700	68,400	-1,900	-600
Arts, Entertainment, and Recreation	10,800	11,200	11,400	-400	-600
Accommodation and Food Services	57,000	58,500	57,000	-1,500	0
Other Services	26,600	26,500	25,100	100	1,500
Government	88,900	89,500	91,000	-600	-2,100
Federal Government	7,500	7,700	7,500	-200	0
State Government	24,300	24,100	25,100	200	-800
Local Government	57,100	57,700	58,400	-600	-1,300

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	Apr-16	Mar-16	Apr-15
Total Civilian Labor Force	742,360	744,980	734,400
Employed	722,700	722,860	708,610
Unemployed	19,660	22,120	25,790
Unemployment Rate	2.6%	3.0%	3.5%

United States (# in thousands)	Apr-16	Mar-16	Apr-15
Total Civilian Labor Force	158,488	158,854	156,554
Employed	151,075	150,738	148,587
Unemployed	7,413	8,116	7,966
Unemployment Rate	4.7%	5.1%	5.1%

Unemployment Rates by Area

Counties	Apr-16	Mar-16	Apr-15
Belknap	2.6%	3.1%	3.5%
Carroll	3.2%	3.3%	3.9%
Cheshire	2.4%	2.9%	3.2%
Coös	4.7%	4.3%	5.8%
Grafton	2.4%	2.5%	3.0%
Hillsborough	2.8%	3.1%	3.7%
Merrimack	2.2%	2.7%	3.1%
Rockingham	2.8%	3.1%	3.7%
Strafford	2.2%	2.6%	3.1%
Sullivan	2.2%	2.5%	3.0%

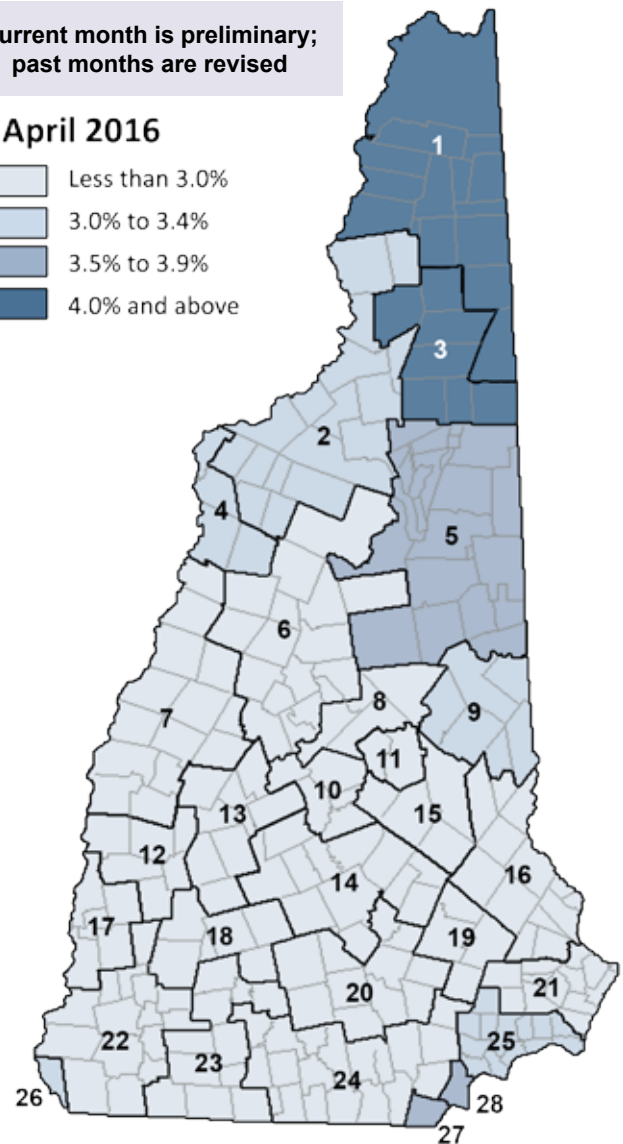
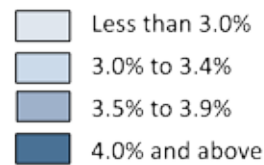
Map Key	Labor Market Areas	Apr-16	Mar-16	Apr-15
1	Colebrook, NH-VT LMA, NH Portion	5.5%	4.0%	5.6%
2	Littletton, NH-VT LMA, NH Portion	3.3%	3.1%	4.0%
3	Berlin NH Micropolitan NECTA	5.3%	5.1%	6.9%
4	Haverhill, NH LMA	3.2%	3.4%	3.7%
5	Conway, NH-ME LMA, NH Portion	3.5%	3.2%	4.1%
6	Plymouth, NH LMA	2.4%	2.6%	3.2%
7	Lebanon, NH-VT Micropolitan NECTA, NH Portion	1.9%	2.2%	2.6%
8	Meredith, NH LMA	2.6%	3.2%	3.3%
9	Wolfeboro, NH LMA	3.0%	3.6%	3.9%
10	Franklin, NH LMA	2.9%	3.5%	3.7%
11	Laconia, NH Micropolitan NECTA	2.8%	3.2%	3.6%
12	Claremont-Newport, NH LMA	2.3%	2.5%	3.2%
13	New London, NH LMA	2.3%	2.4%	2.9%
14	Concord, NH Micropolitan NECTA	2.1%	2.5%	3.0%
15	Belmont, NH LMA	2.5%	3.1%	3.5%
16	Dover-Durham, NH-ME Metropolitan NECTA, NH Portion	2.2%	2.6%	3.1%
17	Charlestown, NH LMA	2.2%	2.6%	2.9%
18	Hillsborough, NH LMA	2.2%	2.7%	3.2%
19	Raymond, NH LMA	2.6%	3.1%	3.4%
20	Manchester, NH Metropolitan NECTA	2.5%	2.8%	3.4%
21	Portsmouth, NH-ME Metropolitan NECTA, NH Portion	2.3%	2.6%	3.1%
22	Keene, NH Micropolitan NECTA	2.3%	2.7%	3.2%
23	Peterborough, NH LMA	2.5%	3.1%	3.3%
24	Nashua, NH-MA NECTA Division, NH Portion	2.9%	3.2%	3.8%
25	Seabrook-Hampstead Area, NH Portion, Haverhill-Newburyport-Amesbury MA-NH NECTA Division	3.3%	3.7%	4.4%
26	Hinsdale Town, NH Portion, Brattleboro, VT-NH LMA	3.1%	3.6%	3.8%
27	Pelham Town, NH Portion, Lowell-Billerica-Chelmsford, MA-NH NECTA Division	3.9%	4.1%	4.7%
28	Salem Town, NH Portion, Lawrence-Metuen-Salem, MA-NH NECTA Division	3.5%	3.6%	4.4%

Unemployment Rates by Region

Not Seasonally Adjusted	Apr-16	Mar-16	Apr-15
United States	4.7%	5.1%	5.1%
Northeast	4.7%	5.1%	5.2%
New England	4.2%	4.9%	4.9%
Connecticut	5.6%	6.2%	5.7%
Maine	3.8%	4.2%	4.8%
Massachusetts	3.9%	4.6%	4.7%
New Hampshire	2.6%	3.0%	3.5%
Rhode Island	4.9%	6.0%	5.9%
Vermont	3.0%	3.5%	3.8%
Mid Atlantic	4.8%	5.3%	5.3%
New Jersey	4.9%	5.0%	5.7%
New York	4.6%	5.2%	5.3%
Pennsylvania	5.2%	5.5%	4.8%

Current month is preliminary;
past months are revised

April 2016



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.

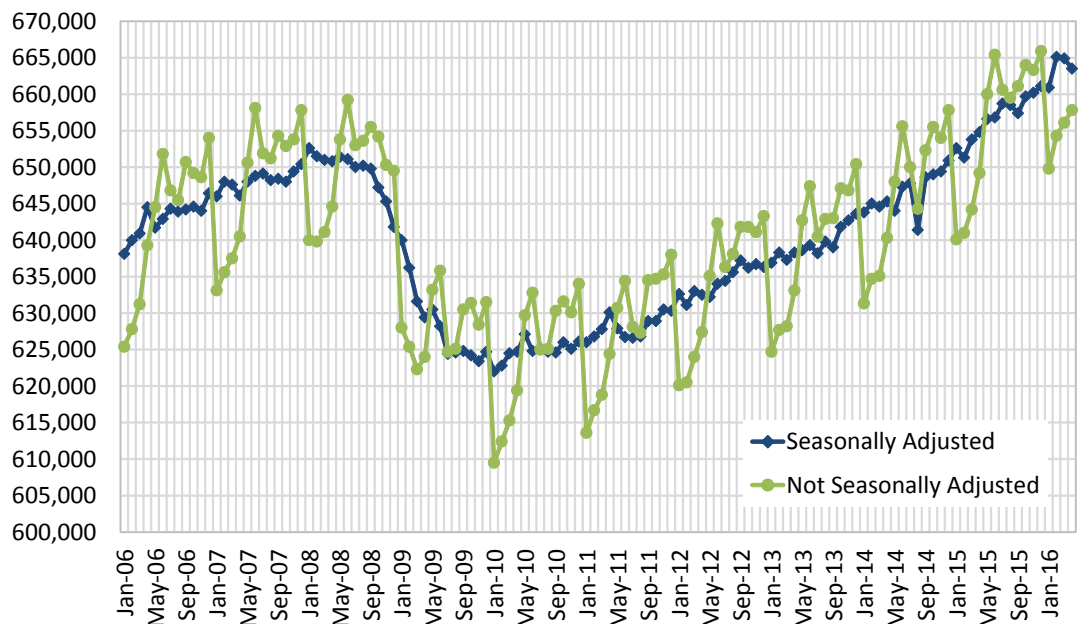
Monthly Estimates by Place of Establishment

New Hampshire Nonfarm Employment Statewide Not Seasonally Adjusted

Current month
is preliminary;
past months
are revised

	Number of Jobs			Change From Previous	
	Apr-16	Mar-16	Apr-15	Month	Year
Total Nonfarm	657,800	656,100	649,200	1,700	8,600
Total Private	565,700	562,600	555,000	3,100	10,700
Mining and Logging	900	800	900	100	0
Construction	24,000	23,400	22,900	600	1,100
Manufacturing	66,500	65,600	66,800	900	-300
Durable Goods	49,800	49,300	50,000	500	-200
Non-Durable Goods	16,700	16,300	16,800	400	-100
Trade, Transportation, and Utilities	138,400	137,200	135,300	1,200	3,100
Wholesale Trade	28,100	28,100	27,400	0	700
Retail Trade	95,300	93,700	93,000	1,600	2,300
Transportation, Warehousing, and Utilities	15,000	15,400	14,900	-400	100
Information	12,600	12,600	12,300	0	300
Financial Activities	36,400	36,300	34,800	100	1,600
Professional and Business Services	77,800	75,800	75,600	2,000	2,200
Education and Health Services	120,500	120,800	118,100	-300	2,400
Leisure and Hospitality	62,000	64,000	63,300	-2,000	-1,300
Other Services	26,600	26,100	25,000	500	1,600
Government	92,100	93,500	94,200	-1,400	-2,100
Federal Government	7,500	7,600	7,600	-100	-100
State Government	25,200	25,200	26,300	0	-1,100
Local Government	59,400	60,700	60,300	-1,300	-900

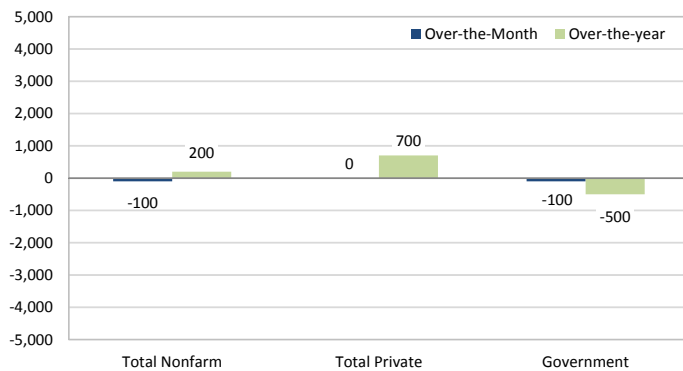
Total Nonfarm Employment Trend for April 2016



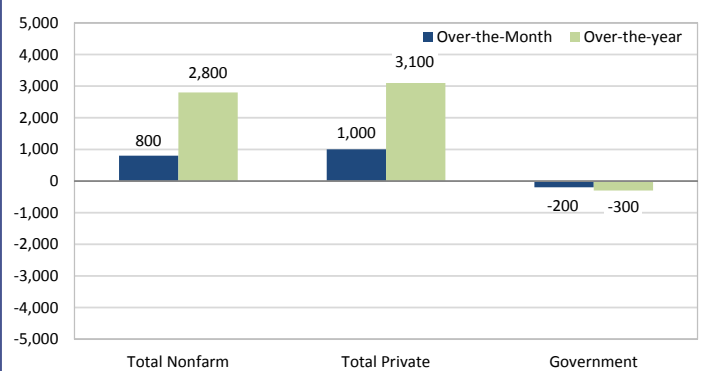
Not Seasonally Adjusted Estimates by Place of Establishment

Nonfarm Employment by Metropolitan Statistical Areas - April 2016

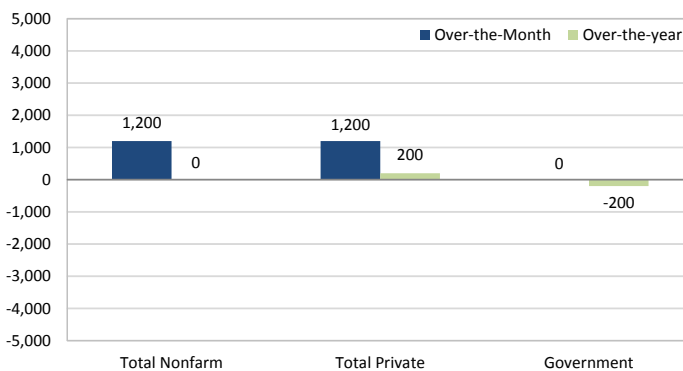
Dover-Durham NH-MA Metro NECTA



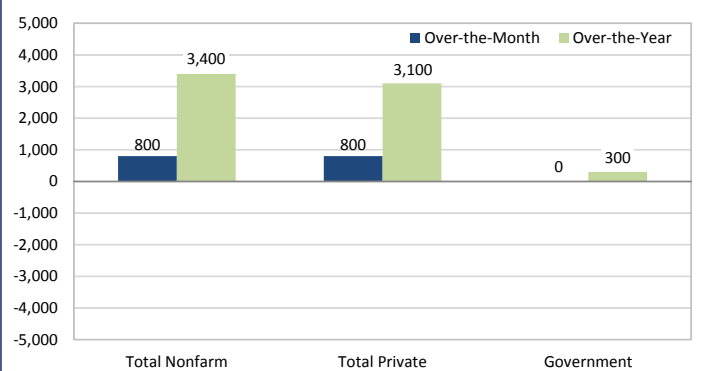
Manchester Metro NECTA



Nashua NH-MA NECTA Division



Portsmouth NH-MA Metro NECTA

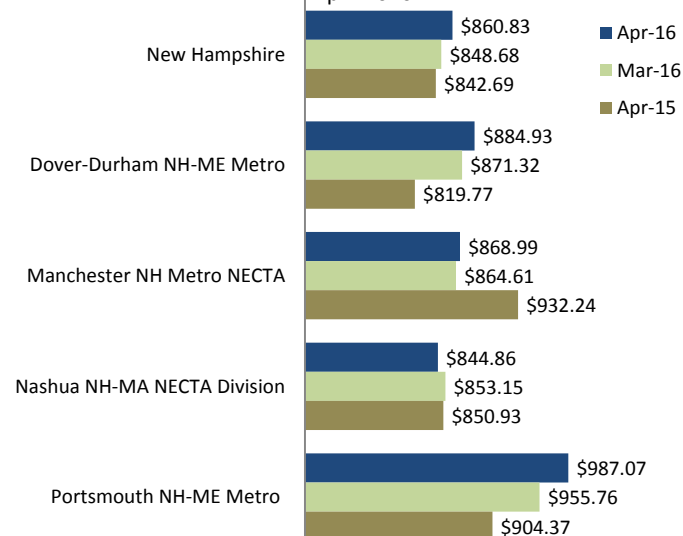


Total Private Average Weekly Earnings Data

All Employees Average Weekly Earnings

Not Seasonally Adjusted

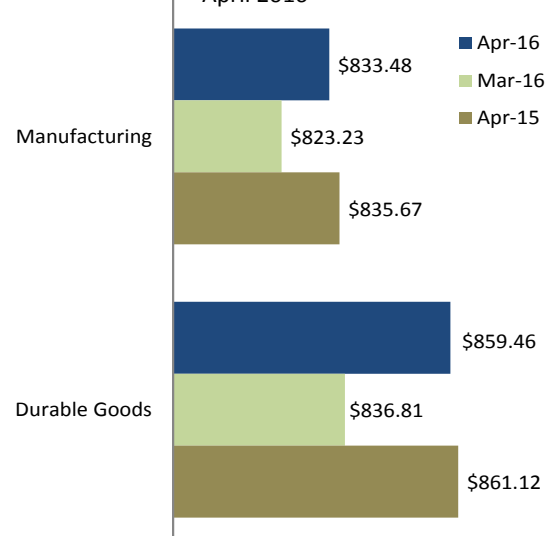
April 2016



Production Workers Average Weekly Earnings

Not Seasonally Adjusted

April 2016



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 Statistical Analysis of Nonfarm Employment

➤ New Hampshire's seasonally adjusted total nonfarm employment declined by 1,400 jobs from March 2016 to April 2016.

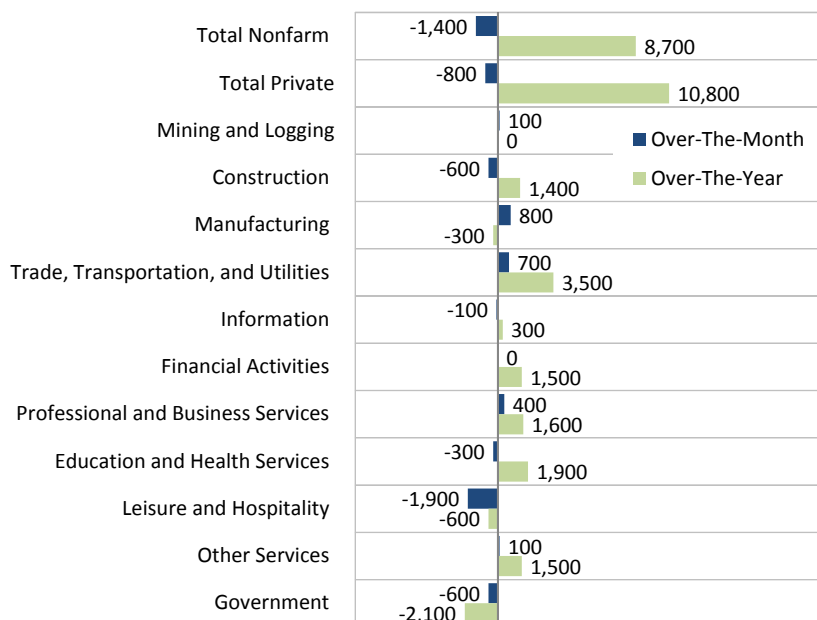
➤ The bulk of total nonfarm job loss can be attributed to Leisure and hospitality, down 1,900 jobs over-the-month — 1,500 of which were in Accommodation and food services

➤ From April 2015 to April 2016, New Hampshire's seasonally adjusted total nonfarm employment added 8,700 jobs.

➤ Employment in Trade, transportation, and utilities increased by 3,500 jobs over-the-year—three-fourths of those were in Retail trade, 2,700 jobs.

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

Seasonally Adjusted April 2016 Change



Not Seasonally Adjusted Statistical Analysis of Nonfarm Employment

➤ From March to April, New Hampshire's not seasonally adjusted employment increased to 657,800, up by 1,700 jobs.

➤ Employers in Professional and business services added 2,000 jobs over-the-month.

➤ While all sectors within Professional and business services gained employment, Administrative and support and waste management and remediation services accounted for 1,300 of the new jobs.

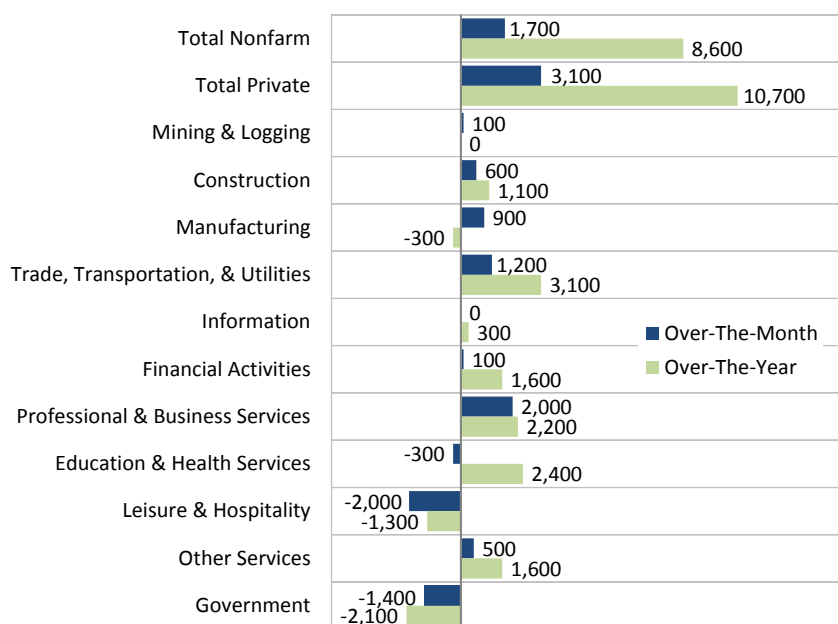
➤ From April 2015 to April 2016, not seasonally total nonfarm increased by 8,600 jobs.

➤ One-third of the increase was in Trade, transportation, and utilities, which added 3,100 jobs over-the-year.

➤ Retail trade was the driving force behind the increase, adding 2,300 jobs.

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

Not Seasonally Adjusted April 2016 Change



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

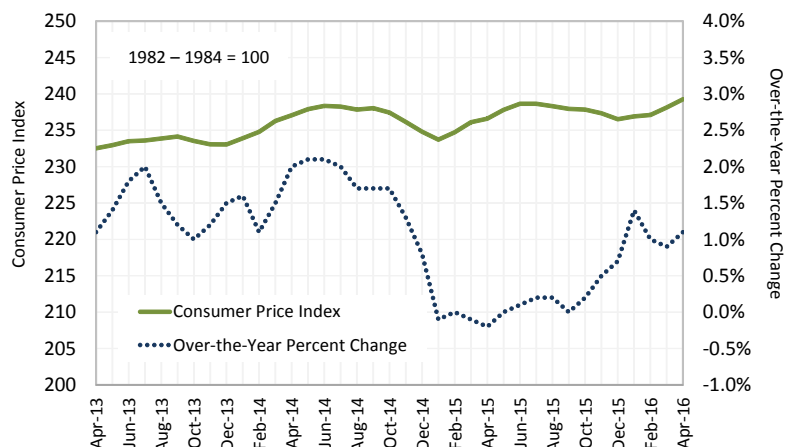
Not Seasonally Adjusted (CPI-U) (1982-1984=100)

Apr-16	Mar-16	Apr-15	Change from Previous	
			Month	Year
239.261	238.132	236.599	0.5%	1.1%

Northeast, All Urban Consumers

Not Seasonally Adjusted (CPI-U) (1982-1984=100)

Apr-16	Mar-16	Apr-15	Change from Previous	
			Month	Year
254.27	252.854	251.760	0.6%	1.0%

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United States, All Urban Consumers

Unemployment Compensation Claims Activity

	Nov-15	Dec-15	Jan-16	Feb-16	Mar-16	Apr-16
Initial Claims	3,164	4,792	4,341	3,735	2,823	3,295
Continued Weeks Claimed	18,144	19,396	26,880	26,453	23,265	19,043
Average payment for a week of unemployment	\$338.71	\$309.36	\$300.62	\$301.81	\$301.61	\$307.46

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