

Child Care in New Hampshire

The *Child day care services* industry is an important part of New Hampshire's economy. *Child day care services* are primarily provided to children under five years of age who are still too young to attend public school. Childcare services also include care for older children during times when they are not in school.

Many working parents – in two-parent households where both parents work, as well as single-parent households – rely on day care services to care for their children. These services allow more parents to participate in the workforce. Without a professional day care industry, many workers would need to reduce their work hours or stay at home entirely to care for their children. Enabling parents to work is a valuable function provided by the *Child day care services* industry, increasing

both the size and productivity of the workforce of every sector of the economy.

Size of the Child Care Industry

The *Child day care services* industry consisted of 483 worksites in 2018, employing almost 5,500 workers. There were also 1,213 “nonemployer” establishments consisting of sole proprietorships or partnerships that don't employ any workers other than the owner(s).

The number of *Child day care services* worksites has steadily declined in recent years. In 2011 there were 533 worksites, 50 more than in 2018. Over that same time frame, the number of workers has increased by more than 700. Nonemployer establishments declined by almost 500 from 2012 to

2018, indicating that the increase in employees is being driven more by the industry consolidating into fewer, larger establishments, than by industry growth.

The U.S. Bureau of Labor Statistics estimates that nationwide employment in the *Child day care services* industry will

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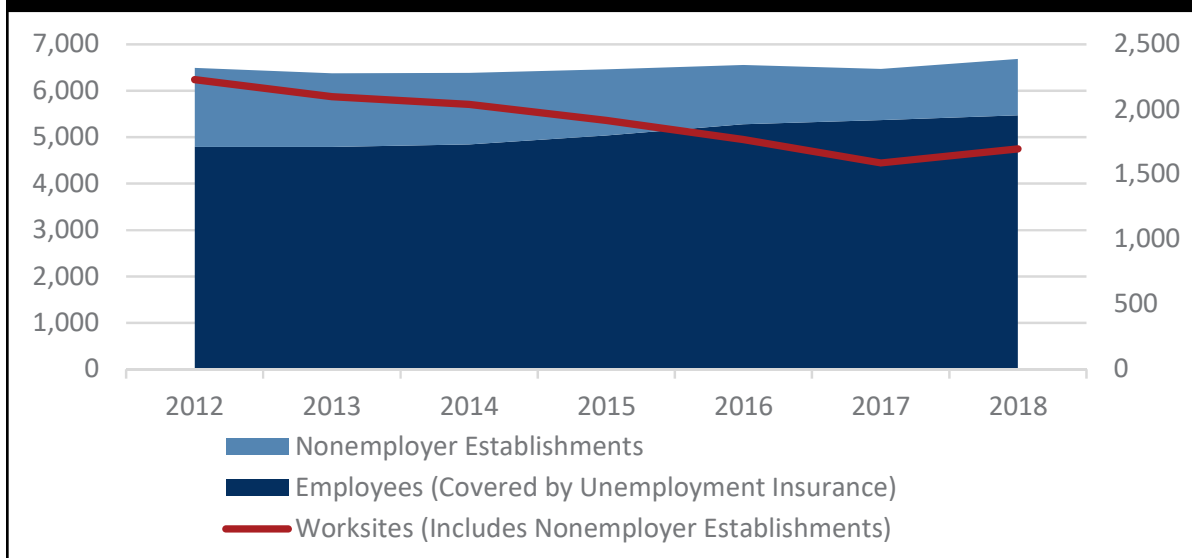
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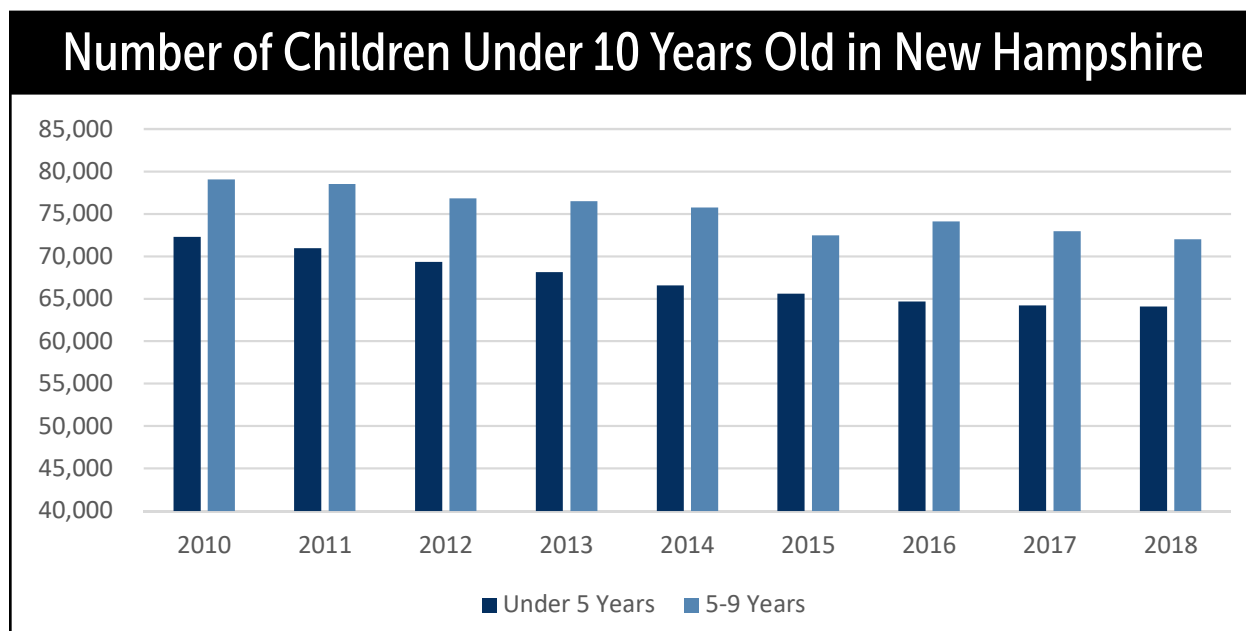
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Child Day Care Services Employment and Establishments in New Hampshire



Source: New Hampshire Employment Security Quarterly Covered Employment and Wages, U.S. Census Bureau Nonemployer Statistics



Source: U.S. Census Bureau, American Community Survey

grow 7.3 percent from 2018 to 2028, an average of 0.7 percent per year.¹ This is slightly faster than overall employment is projected to grow over that time. However, recent demographic trends in New Hampshire may limit growth in the *Child day care services* industry. While New Hampshire's total population was been growing at a slow but consistent rate, the number of children under 10 years of age has been gradually declining. From 2010 to 2018, the number of children under 10 years of age fell by 15,000, a ten percent decline.

Despite declines in the number of children under age 10 in New Hampshire, just over 30 percent of workers in New Hampshire have children under age 18 and eight percent have children under age six. The percentage of New Hampshire residents between ages 25-54 – those most likely to have children under age 18 – in the labor force has been fairly steady in recent years, indicating that the percentage of parents in the workforce has not changed. If more parents joined the workforce, a greater proportion of children would require daycare services, but this does not appear to be the case. With the number of children in New Hampshire declining and the labor force participation of parents unchanged, demand for daycare services seems unlikely to increase. However, there remain significant availability and affordability constraints for many parents seeking day care services in the state.

Occupations and Wages

Over eighty percent of workers in childcare are classified as either *Preschool teachers, except special education*, *Childcare workers*, or *Teacher assistants*. The responsibilities of these occupations differ, but they all involve directly working with

children, rather than administrative or other responsibilities. An additional four percent of workers are classified as *Education administrators, preschool and childcare center/program*.

Occupation Title	Median Annual Wages	Education / Experience / Training
Childcare Workers	\$24,322	High School none Short OJT
Teacher Assistants	\$30,013	Some College none none
Preschool Teachers, Except Special Education	\$31,442	Associate's none none
Education Administrators, Preschool and Childcare Center/Program	\$46,125	Bachelor's < 5 yrs none

Source: New Hampshire Employment Security Occupational Employment Statistics May 2019 Panel, 2018-2028 Occupational Employment Projections

Typical educational requirements for entry-level child day care occupations are relatively low. *Childcare Workers* generally require a high school diploma and less than one month of on-the-job training, while *Teacher assistants* usually require some college and *Preschool Teachers* usually require an Associate's degree for entry-level employment.

There are also voluntary credentials for child care facility workers in New Hampshire, with a range of credentials reflecting different levels of childcare experience and education.² New Hampshire Department of Health and Human Services' (DHHS) Child Development Bureau published an Early

¹ Projections for this industry are not available at the state level.

² New Hampshire Employment Security, Licensed, Certified, and Registered Occupations in New Hampshire 2019, <https://www.nhes.nh.gov/elmi/products/licertoc/documents/ccpctea.pdf>.

Childhood Professional Development System Guidebook, which lays out a number of career paths childcare professionals can follow to increase their education, credentials, and professional development.³

Wages for occupations in the *Child day care services* industry are relatively low. *Teacher Assistants* had a median annual wage of \$31,442 in 2019, and *Childcare Workers* had a median annual wage of \$24,322. Median wages for *Preschool Teachers, Except Special Education* were \$30,013 annually. Wages for all three of these occupations were well below the average wage for all workers statewide, which was \$41,485 per year in 2019. Wages for childcare occupations do not increase much with experience. The experienced wage for a *Preschool Teacher*, which measures the mean earnings of the highest-earning two-thirds of workers, was just \$34,439 per year.

Licensure (Program and Professional)

Although credentials for staff are voluntary, childcare facilities require licensure from DHHS. DHHS reported 834 licensed establishments in 2018. There were a number of exceptions to the licensure requirement, including for day care establishments operated out of a private home if they care for three or fewer children who are not related to the establishment operator.⁴ This likely explains the discrepancy between the 834 licensed establishments reported by DHHS⁵ and the 1,696 worksites and nonemployer establishments reported by New Hampshire Employment Security and the

U.S. Census Bureau that same year. The average nonemployer establishment had annual receipts of \$16,400, which suggests that many of these are very small establishments, and are likely too small to require a license.

Impact of Pandemic on Labor Force Participation

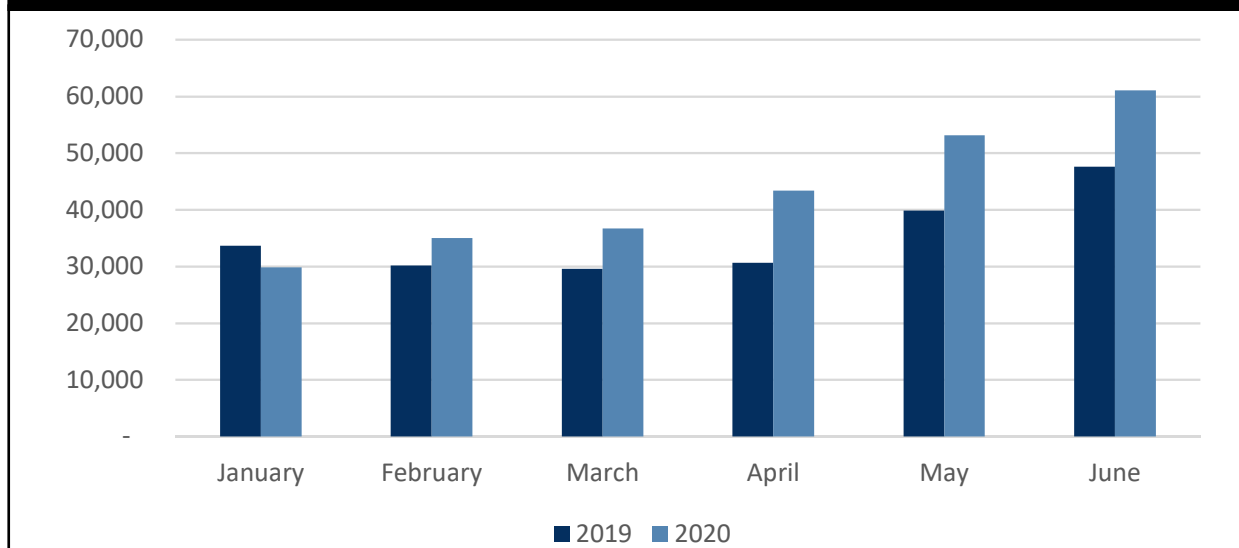
The coronavirus pandemic has had a significant impact on the *Child day care services* industry. The industry never shut down entirely but many day care facilities either closed or reduced capacity. However, some establishments actually expanded capacity⁶ to ensure that the children of essential workers had access to day care facilities. Prior to the pandemic, day care facilities in New Hampshire had the capacity to care for 46,000 children.⁷ In early June, only about 30 percent of that capacity was actually available.

With so many *child day care services* establishments closed or operating at reduced capacity, many workers at these establishments were laid off. In the week ending May 9th, 1,583 childcare workers filed a continuing unemployment claim in New Hampshire.⁸ Continuing claims are filed by individuals who are eligible to receive unemployment benefits, and indicate that they remain unemployed. The continuing claims filed during the week of May 9th represented 24 percent of all workers in the industry. Since then, the number of continuing claims has fallen, but unemployment among *Child day care service* workers remains high. During the week ending June 20th, 17 percent of *Child day care service* workers

filed continuing unemployment claims.

Child day care service workers were not the only ones impacted by reduced childcare capacity. The parents of children who usually attended closed day care facilities now needed alternate childcare arrangements. Unable to find alternative childcare, a significant number of parents left the

Not in Labor Force / Taking Care of Family



Source: U.S. Census Bureau Current Population Survey

³ New Hampshire Department of Health and Human Services, *New Hampshire's Early Childhood Professional Development System Guidebook* https://www.dhhs.nh.gov/dcyf/cdb/documents/nh_early_childhood_profdev_oct2015.pdf.

⁴ New Hampshire Department of Health and Human Services, *Quality Initiatives & Licensing Exemptions* <https://www.dhhs.nh.gov/loos/cclul/quality.htm>.

⁵ "NH Market Rate Survey: Results, Trends and Predictions," Kalinowski & Kalinowski, <https://www.dhhs.nh.gov/dcyf/cdb/documents/mr-presentation-concord-07182018.pdf>.

⁶ Emergency Child Care Collaborative, *ChildCareAware of New Hampshire*, <http://nh.childcareaware.org/the-child-care-workforce-is-essential>.

⁷ Geier, Susan, "NH's already vulnerable child care industry overwhelmed by COVID-19," *Concord Monitor*, <https://www.concordmonitor.com/NH-s-already-vulnerable-childcare-industry-overwhelmed-by-Covid-19-34559156>.

⁸ Claims data includes only individuals who both live and work in New Hampshire. It does not include individuals who live in New Hampshire and work elsewhere, or those who work in New Hampshire but live elsewhere.

workforce, not because they had lost their job, but because they needed to provide care for their children.

Data from the U.S. Bureau of Labor Statistics' Current Population Survey shows that the number of individuals in New Hampshire who indicated that they were not in the labor force because they were taking care of their family increased significantly in April, May, and June of 2020. Compared to the same months in 2019, the number of individuals in New Hampshire who were not in the labor force because they were taking care of family increased by 13,000.⁹

Individuals who leave jobs during because of childcare issues are not considered unemployed; to be considered unemployed, an individual needs to be available for work. Since those who are providing family care are not available for work, they are considered not in the labor force, and as a result are not considered unemployed. New Hampshire's labor force decreased by nearly 67,000 individuals from February 2020 to April 2020.

The labor force increased in May and June, but was still lower in June than it was in February by 26,000 individuals.

A year-over-year increase of 13,000 individuals taking care of family shows that family care is currently a significant factor in keeping individuals out of the labor force. This number did not change significantly between April 2020 and June 2020, indicating that, even as many New Hampshire residents have been able to return to employment, those individuals who are typically in the labor force, but have been taking care of family during the pandemic are facing barriers to returning to employment. There are a number of reasons why this could be the case; these individuals could be unable to find an open day care, or could be unwilling to risk the health of family members by returning to day care and work.

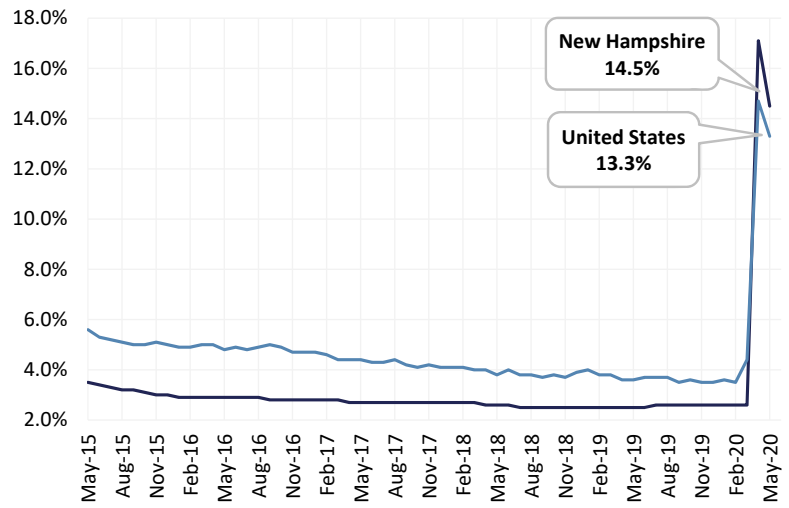
- Greg David, Economist

⁹ Family care also includes caring for elderly or disabled relatives, or household management.

SEASONALLY ADJUSTED ESTIMATES

Unemployment Estimates by Region

Seasonally Adjusted	May-20	Apr-20	May-19
United States	13.3%	14.7%	3.6%
Northeast	14.1%	15.3%	3.7%
New England	13.7%	14.0%	3.1%
Connecticut	9.4%	8.3%	3.7%
Maine	9.3%	10.4%	3.0%
Massachusetts	16.3%	16.2%	2.9%
New Hampshire	14.5%	17.1%	2.5%
Rhode Island	16.3%	18.1%	3.6%
Vermont	12.7%	16.5%	2.3%
Mid Atlantic	14.2%	15.8%	3.9%
New Jersey	15.2%	16.3%	3.3%
New York	14.5%	15.3%	4.0%
Pennsylvania	13.1%	16.1%	4.2%

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

Current Employment Statistics (CES) by Place of Establishment

	Number of Jobs			Change From Previous	
	May-20	Apr-20	May-19	Month	Year
Total Nonfarm	583,600	572,000	683,500	11,600	-99,900
Total Private	502,100	489,800	593,200	12,300	-91,100
Mining and Logging	900	1,000	900	-100	0
Construction	27,300	26,200	27,600	1,100	-300
Manufacturing	66,900	65,500	71,700	1,400	-4,800
Durable Goods	50,500	50,200	53,700	300	-3,200
Non-Durable Goods	16,400	15,300	18,000	1,100	-1,600
Trade, Transportation, and Utilities	116,700	118,400	139,300	-1,700	-22,600
Wholesale Trade	25,900	26,900	28,100	-1,000	-2,200
Retail Trade	75,700	75,500	94,100	200	-18,400
Transportation, Warehousing, and Utilities	15,100	16,000	17,100	-900	-2,000
Information	11,700	11,700	12,400	0	-700
Financial Activities	34,000	34,000	34,900	0	-900
Financial and Insurance	27,100	27,200	27,800	-100	-700
Real Estate and Rental and Leasing	6,900	6,800	7,100	100	-200
Professional and Business Services	75,300	75,300	83,300	0	-8,000
Professional, Scientific, and Technical Services	36,700	37,400	38,700	-700	-2,000
Management of Companies and Enterprises	8,700	8,800	9,200	-100	-500
Administrative and Support and Waste Management and Remediation Services	29,900	29,100	35,400	800	-5,500
Education and Health Services	112,200	109,000	124,700	3,200	-12,500
Educational Services	27,300	27,000	30,700	300	-3,400
Health Care and Social Assistance	84,900	82,000	94,000	2,900	-9,100
Leisure and Hospitality	33,700	28,200	73,200	5,500	-39,500
Arts, Entertainment, and Recreation	4,700	5,800	12,900	-1,100	-8,200
Accommodation and Food Services	29,000	22,400	60,300	6,600	-31,300
Other Services	23,400	20,500	25,200	2,900	-1,800
Government	81,500	82,200	90,300	-700	-8,800
Federal Government	8,100	8,200	7,900	-100	200
State Government	21,300	21,900	24,400	-600	-3,100
Local Government	52,100	52,100	58,000	0	-5,900

*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	May-20	Apr-20	May-19
Total Civilian Labor Force	722,490	713,760	768,810
Employed	617,960	590,890	750,290
Unemployed	104,530	122,870	18,520
Unemployment Rate	14.5%	17.2%	2.4%

United States (# in thousands)	May-20	Apr-20	May-19
Total Civilian Labor Force	157,975	155,830	162,655
Employed	137,461	133,326	157,152
Unemployed	20,514	22,504	5,503
Unemployment Rate	13.0%	14.4%	3.4%

Unemployment Rates by Area

Counties	May-20	Apr-20	May-19
Belknap	17.1%	20.6%	2.4%
Carroll	20.2%	24.3%	2.6%
Cheshire	12.3%	14.8%	2.4%
Coös	17.9%	22.2%	3.2%
Grafton	13.4%	16.1%	2.1%
Hillsborough	14.7%	17.2%	2.5%
Merrimack	13.2%	15.7%	2.1%
Rockingham	14.6%	17.6%	2.5%
Strafford	14.0%	16.4%	2.1%
Sullivan	11.1%	13.6%	2.2%

Map Key	Labor Market Areas	May-20	Apr-20	May-19
1	Colebrook, NH-VT LMA, NH Portion	15.6%	22.7%	3.4%
2	Littleton, NH-VT LMA, NH Portion	18.0%	21.5%	2.5%
3	Berlin NH Micropolitan NECTA	18.5%	22.7%	3.6%
4	Haverhill, NH LMA	11.3%	15.1%	2.3%
5	Conway, NH-ME LMA, NH Portion	23.6%	28.5%	2.6%
6	Plymouth, NH LMA	16.2%	19.5%	2.2%
7	Lebanon, NH-VT Micropolitan NECTA, NH Portion	9.3%	11.0%	2.0%
8	Meredith, NH LMA	15.7%	19.0%	2.3%
9	Wolfeboro, NH LMA	16.8%	20.1%	2.7%
10	Franklin, NH LMA	18.5%	22.1%	2.4%
11	Laconia, NH Micropolitan NECTA	18.3%	22.0%	2.6%
12	Expanded Claremont, NH estimating area	12.0%	14.8%	2.3%
13	New London, NH LMA	11.3%	13.3%	2.1%
14	Concord, NH Micropolitan NECTA	12.8%	15.2%	2.1%
15	Belmont, NH LMA	16.1%	19.4%	2.3%
16	Dover-Durham, NH-ME Metropolitan NECTA, NH Portion	14.0%	16.4%	2.1%
17	Charlestown, NH LMA	9.8%	12.1%	2.3%
18	Hillsborough, NH LMA	12.7%	14.5%	2.5%
19	Raymond, NH LMA	14.0%	16.9%	2.3%
20	Manchester, NH Metropolitan NECTA	14.8%	17.4%	2.3%
21	Portsmouth, NH-ME Metropolitan NECTA, NH Portion	13.5%	16.5%	2.2%
22	Keene, NH Micropolitan NECTA	12.9%	15.3%	2.4%
23	Peterborough, NH LMA	11.5%	13.5%	2.3%
24	Nashua, NH-MA NECTA Division, NH Portion	14.6%	17.2%	2.6%
25	Seabrook-Hampstead Area, NH Portion, Haverhill-Newburyport-Amesbury MA-NH NECTA Division	15.7%	19.0%	2.8%
26	Hinsdale Town, NH Portion, Brattleboro, VT-NH LMA	13.5%	18.1%	3.5%
27	Pelham Town, NH Portion, Lowell-Billerica-Chelmsford, MA-NH NECTA Division	16.2%	18.6%	3.1%
28	Salem Town, NH Portion, Lawrence-Methuen-Salem, MA-NH NECTA Division	16.7%	19.7%	3.2%

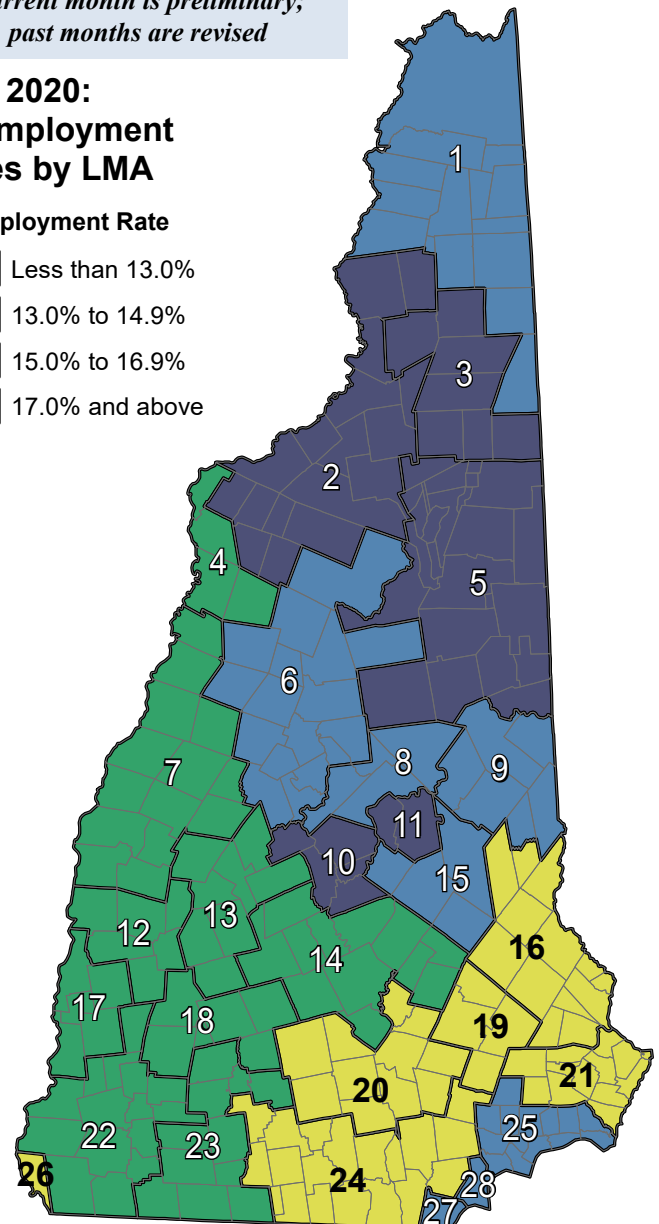
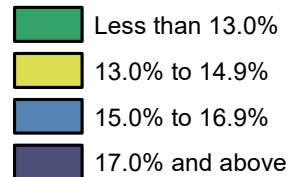
Unemployment Rates by Region

Not Seasonally Adjusted	May-20	Apr-20	May-19
United States	13.0%	14.4%	3.4%
Northeast	13.9%	15.0%	3.4%
New England	13.7%	13.9%	3.0%
Connecticut	9.3%	8.0%	3.6%
Maine	9.4%	10.8%	3.0%
Massachusetts	16.3%	16.0%	2.9%
New Hampshire	14.5%	17.2%	2.4%
Rhode Island	16.0%	17.9%	3.3%
Vermont	12.6%	16.8%	2.2%
Mid Atlantic	14.0%	15.5%	3.6%
New Jersey	14.9%	15.9%	3.0%
New York	14.2%	15.1%	3.6%
Pennsylvania	12.9%	15.6%	4.0%

*Current month is preliminary;
past months are revised*

May 2020:
Unemployment Rates by LMA

Unemployment Rate



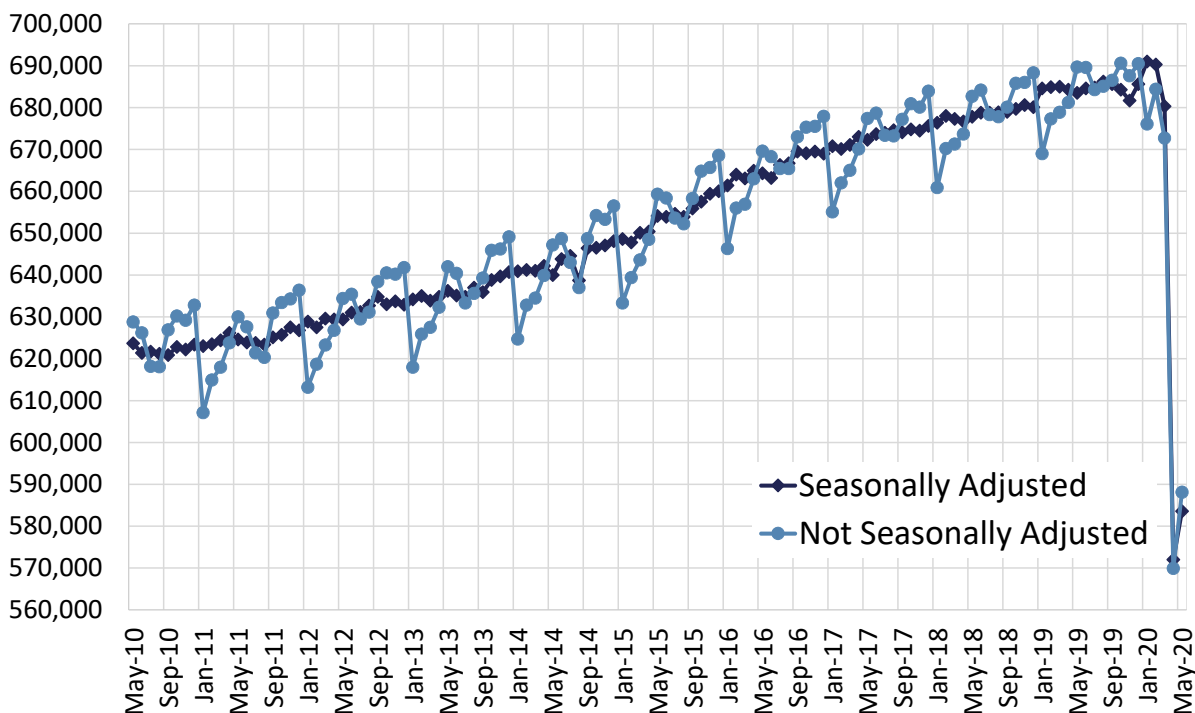
MONTHLY ESTIMATES BY PLACE OF ESTABLISHMENT

New Hampshire Nonfarm Employment Statewide
Not Seasonally Adjusted

*Current month
is preliminary;
past months
are revised*

	Number of Jobs			Change From Previous	
	May-20	Apr-20	May-19	Month	Year
Total Nonfarm	588,100	569,900	689,700	18,200	-101,600
Total Private	503,800	484,700	596,200	19,100	-92,400
Mining and Logging	900	900	900	0	0
Construction	27,200	25,100	28,000	2,100	-800
Manufacturing	66,400	65,400	71,600	1,000	-5,200
Durable Goods	50,200	50,100	53,600	100	-3,400
Non-Durable Goods	16,200	15,300	18,000	900	-1,800
Trade, Transportation, and Utilities	116,800	116,300	138,600	500	-21,800
Wholesale Trade	25,800	26,800	28,100	-1,000	-2,300
Retail Trade	75,900	73,900	93,500	2,000	-17,600
Transportation, Warehousing, and Utilities	15,100	15,600	17,000	-500	-1,900
Information	11,700	11,700	12,500	0	-800
Financial Activities	33,600	33,600	34,800	0	-1,200
Professional and Business Services	75,100	74,900	83,400	200	-8,300
Education and Health Services	115,300	112,000	128,000	3,300	-12,700
Leisure and Hospitality	33,500	24,400	73,300	9,100	-39,800
Other Services	23,300	20,400	25,100	2,900	-1,800
Government	84,300	85,200	93,500	-900	-9,200
Federal Government	8,100	8,200	7,900	-100	200
State Government	21,900	23,000	25,500	-1,100	-3,600
Local Government	54,300	54,000	60,100	300	-5,800

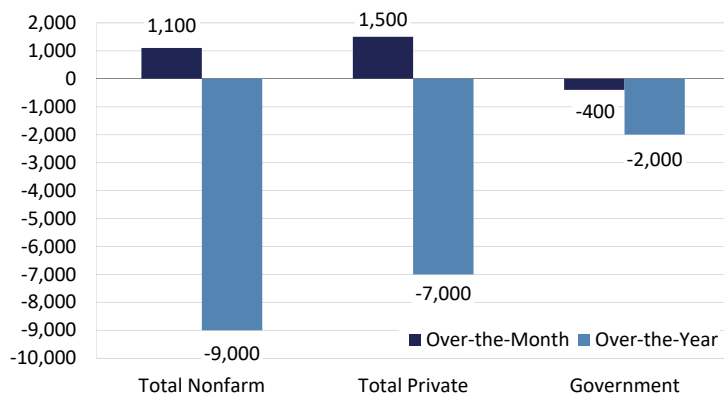
Total Nonfarm Employment Trend Through May 2020



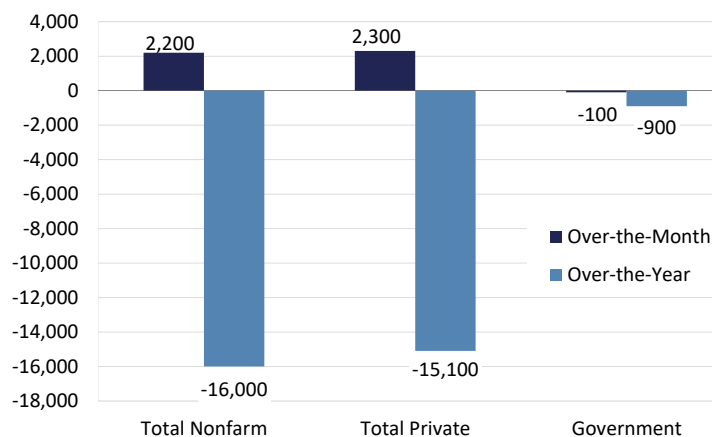
MONTHLY ESTIMATES BY PLACE OF ESTABLISHMENT

Nonfarm Employment by Metropolitan Statistical Areas - May 2020

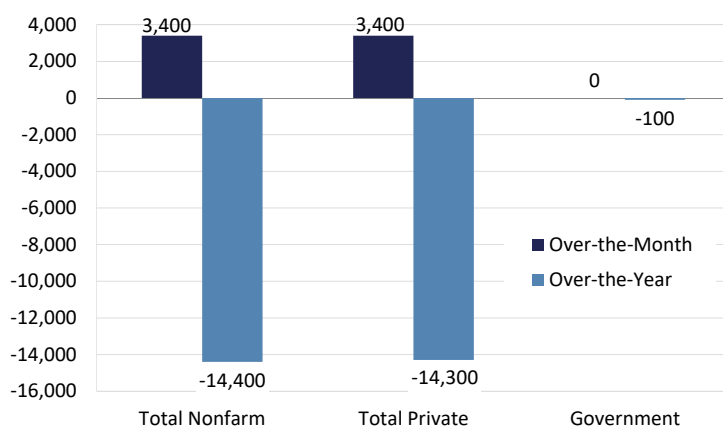
Dover-Durham NH-ME Metro NECTA



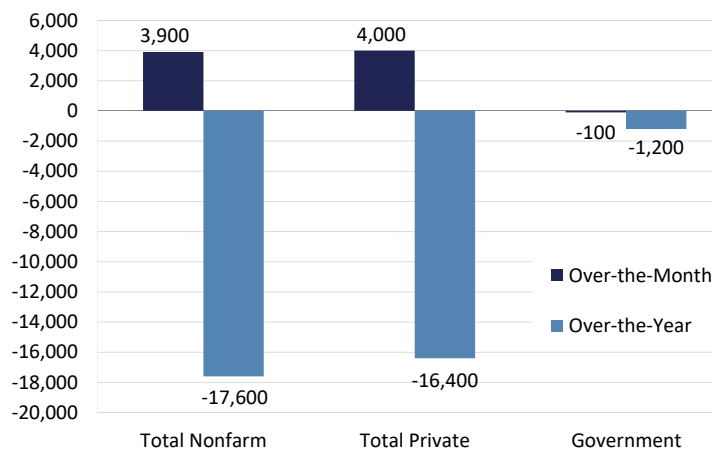
Manchester Metro NECTA



Portsmouth NH-ME Metro NECTA

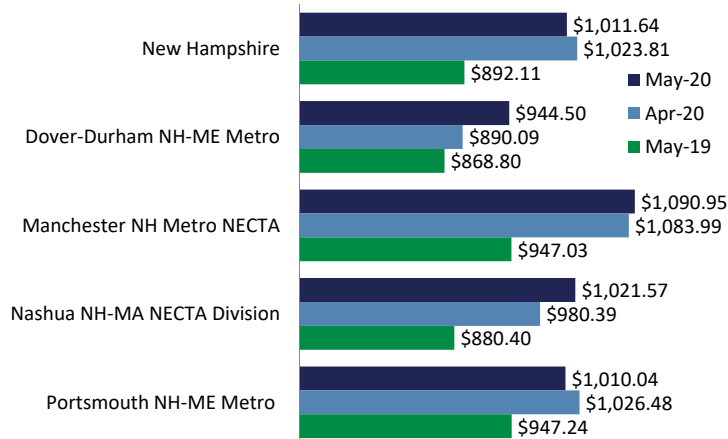


Nashua NH-MA NECTA Division

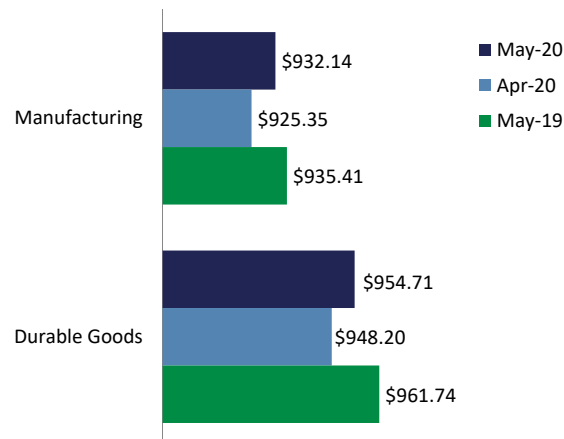


Total Private Average Weekly Earnings Data

All Employee Average Weekly Earnings



Production Workers Average Weekly Earnings



MONTHLY ANALYSIS OF CURRENT EMPLOYMENT STATISTICS (CES)

Seasonally Adjusted

Total Nonfarm employment increased by 11,600 jobs in May, according to preliminary seasonally adjusted estimates. Five private industry supersectors experienced over-the-month employment gains in May, two supersectors experienced losses and three were unchanged. *Leisure and Hospitality* gained 5,500 jobs in May after suffering the greatest supersector loss in April. *Private Education and Health Services* expanded payrolls by 3,200, while *Other Services* added 2,900 positions. *Manufacturing* employment increased by 1,400 and *Construction* added 1,100 jobs.

Mining and Logging lost 100 jobs over-the-month, while *Trade, Transportation, and Utilities* employment shed 1,700 positions. *Professional and Business Services*, *Financial Activities* and *Information* were unchanged from April. *Government* employment decreased by 700 over-the-month.

Seasonally adjusted *Total Nonfarm* employment decreased by 99,900 jobs from May 2019 to May 2020, reflecting the impact on employment due to the coronavirus (COVID-19) pandemic and efforts to contain it. Employment losses were experienced in every supersector, with the exception of *Mining and Logging*, which was unchanged over-the-year. *Leisure and Hospitality* suffered the greatest loss, with 39,500 fewer jobs than in May 2019. *Trade, Transportation, and Utilities* employment decreased by 22,600, while *Private Education and Health Services* was down 12,500 positions.

Professional and Business Services cut payrolls by 8,000 positions, while *Manufacturing* cut 4,800 jobs. *Other Services* employment declined by 1,800 and *Financial Activities* trimmed payrolls by 900 over-the-year. *Information* cut 700 positions, while *Construction* lost 300 jobs. *Government* employment decreased by 8,800 from May 2019 to May 2020.

Not Seasonally Adjusted

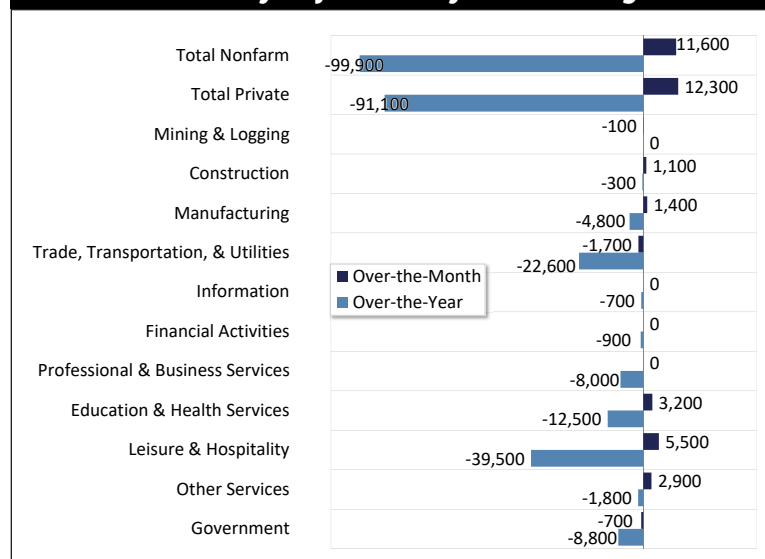
Preliminary unadjusted estimates for May show that *Total Nonfarm* employment decreased by 101,600 jobs over-the-year, reflecting the impact on employment due to the coronavirus (COVID-19) pandemic and efforts to contain it. All industry supersectors experienced over-the-year employment losses in May, with the exception of *Mining and Logging*, which was unchanged over-the-year. *Leisure and Hospitality* experienced the largest decrease, with 39,800 fewer jobs than in May 2019. *Trade, Transportation, and Utilities* employment decreased by 21,800, while *Private Education and Health Services* lost 12,700 positions.

Professional and Business Services cut payrolls by 8,300 positions, while *Manufacturing* cut 5,200 jobs. *Other Services* employment declined by 1,800 and *Financial Activities* had 1,200 fewer positions. *Construction* and *Information* each cut 800 jobs over-the-year. *Government* employment decreased by 9,200 from May 2019 to May 2020.

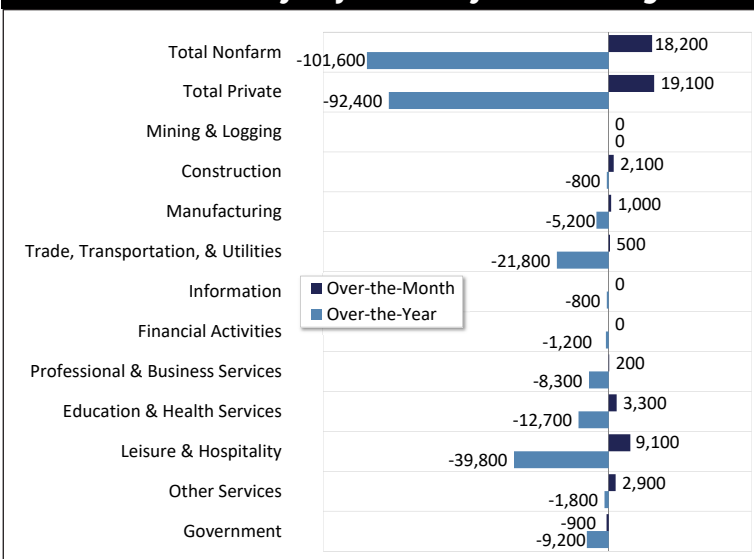
Unadjusted estimates provide a snapshot of the number of New Hampshire jobs by industry in any given month. However, over-the-month changes to unadjusted employment estimates reflect both changes in economic conditions and seasonal patterns of employment growth and decline. All industries experience seasonal changes to some degree, although these patterns tend to be more obvious in *Leisure and Hospitality*; *Trade, Transportation, and Utilities* and *Construction*. Over-the-month changes to unadjusted employment estimates should not be compared without consideration for the normal seasonal pattern of the appropriate industries. The most appropriate method for the comparison of unadjusted monthly data is to compare the estimates for the same month in different years; as this will minimize, but not eliminate, the effect of seasonal employment patterns on observed changes.

– Robert Cote, Research Analyst

Seasonally Adjusted May 2020 Change



Not Seasonally Adjusted May 2020 Change



Consumer Price Index**United States, All Urban Consumers**

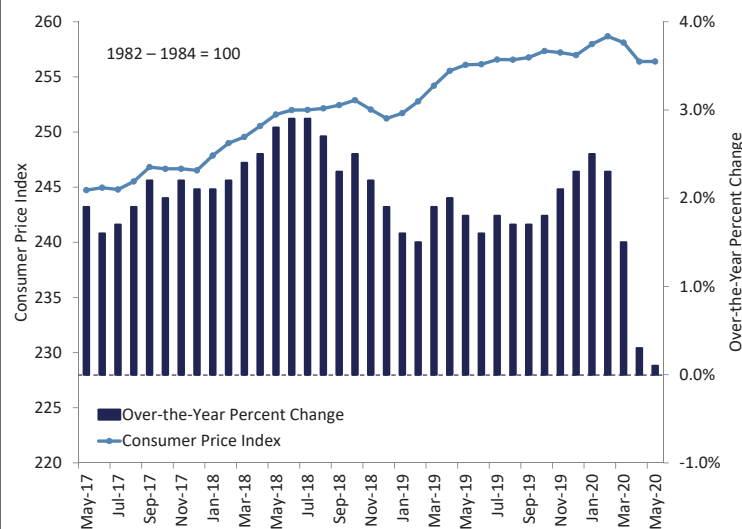
Not Seasonally Adjusted (CPI-U) (1982-1984=100)

			Change From Previous	
May-20	Apr-20	May-19	Month	Year
256.394	256.389	256.092	0.0%	0.1%

Northeast, All Urban Consumers

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

			Change From Previous	
May-20	Apr-20	May-19	Month	Year
271.345	271.325	269.744	0.0%	0.6%

**Consumer Price Index
United States, All Urban Consumers**

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