

A State of Change

Preliminary 2016 average annual employment in New Hampshire privately-owned business establishments was 562,792, up by over 20,000 jobs from 2008, when the last recession began. There were job gains in all industry sectors, save *Utilities*, during the 2012 to 2016 period. The gains during this period were enough to mitigate job losses of the five years from 2008 to 2012 in 13 of the 19 industry sectors.

Overall, this is good news for the state as a whole, but the recovery has been far from equal among New Hampshire counties. Comparisons between the counties

are challenging because the distribution of employment follows a similar concentration to the distribution of population, with the exception of Strafford and Grafton counties. Although changes in employment may be smaller in number in the counties with less population, the proportional impact can be more pronounced.

Every county experienced a decline in private employment during the four years from 2008 to 2012. According to preliminary 2016 figures, employment in four counties has yet to recapture 2008 levels. Job losses in Hillsborough County from

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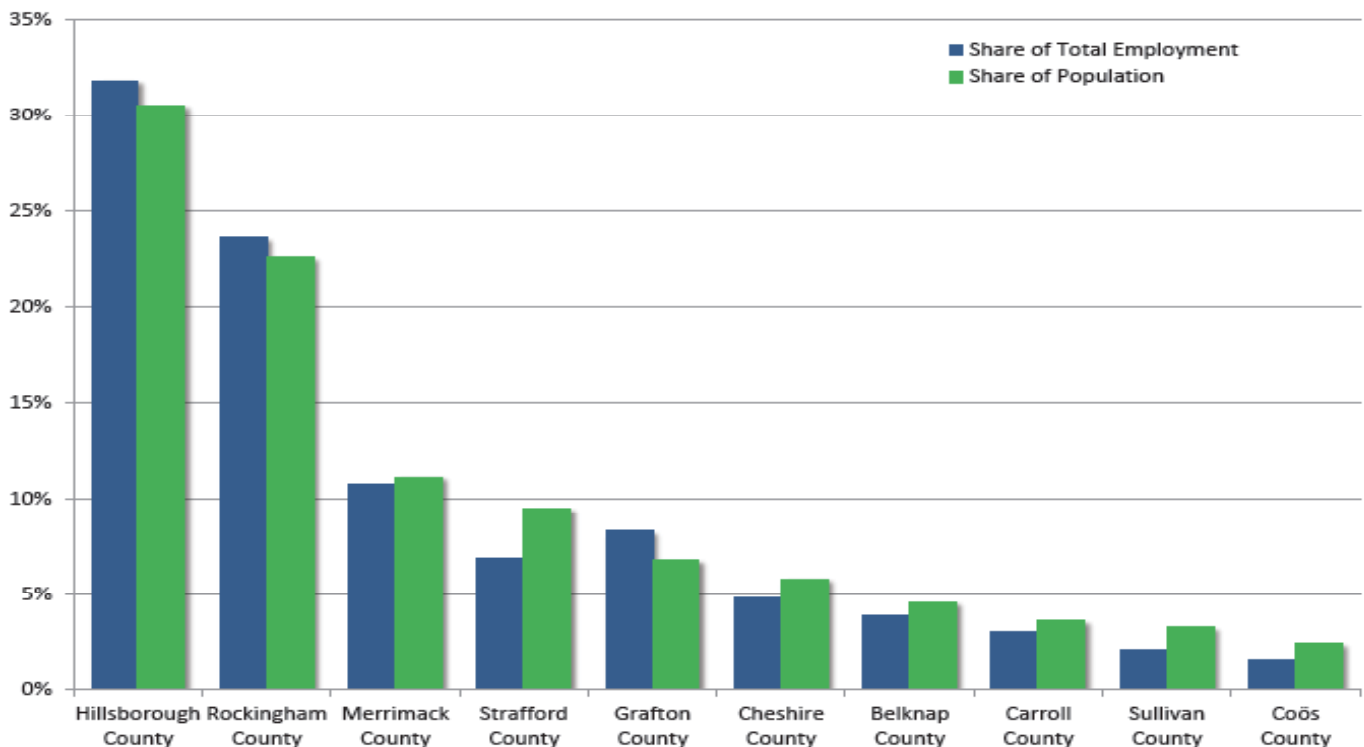
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2008 to 2012 accounted for almost half of all job losses in the state, more than four times the net job losses of any other county. While that was the largest numeric loss for any one county, it represented a 4.1 percent

Distribution of employment among New Hampshire counties follows similar pattern to population



decline in total private employment for Hillsborough County. The net job losses in other counties were not as large as in Hillsborough County, but proportionately, their impact was bigger.

During the four years from 2012 to 2016, Hillsborough County gained 11,789 jobs, the most compared to other New Hampshire counties. Rockingham was a close second with 11,712 more jobs. Seven of the ten counties gained jobs during the 2012 to 2016 period.

County employment among selected industries

Five industry sectors in New Hampshire experienced net employment gains of over 2,000 workers from 2008 to 2016. These sectors were: *Health care and social assistance, Administrative and waste services, Accommodation and food services, Professional and technical services, and Educational services.*

| | Change in New Hampshire Private Employment | | | | | |
|---------------------|--|------------|------------|---------------------------|------------|------------|
| | Net Employment Change | | | Percent Employment Change | | |
| | 2008-2012 | 2012-2016* | 2008-2016* | 2008-2012 | 2012-2016* | 2008-2016* |
| New Hampshire | (14,505) | 35,529 | 21,024 | -2.7% | 6.7% | 3.9% |
| Rockingham County | (1,253) | 11,712 | 10,459 | -1.0% | 9.7% | 8.5% |
| Hillsborough County | (7,120) | 11,789 | 4,669 | -4.1% | 7.1% | 2.7% |
| Merrimack County | (349) | 3,273 | 2,924 | -0.6% | 5.7% | 5.1% |
| Strafford County | (1,324) | 2,611 | 1,287 | -3.6% | 7.3% | 3.5% |
| Sullivan County | (157) | 710 | 553 | -1.4% | 6.4% | 4.9% |
| Grafton County | (920) | 1,412 | 492 | -2.0% | 3.1% | 1.1% |
| Carroll County | (553) | (29) | (582) | -3.1% | -0.2% | -3.3% |
| Belknap County | (1,535) | 633 | (902) | -6.8% | 3.0% | -4.0% |
| Cheshire County | (1,193) | (53) | (1,246) | -4.2% | -0.2% | -4.4% |
| Coös County | (1,183) | (524) | (1,707) | -11.0% | -5.5% | -15.9% |

*2016 data are preliminary

Health Care and Social Assistance

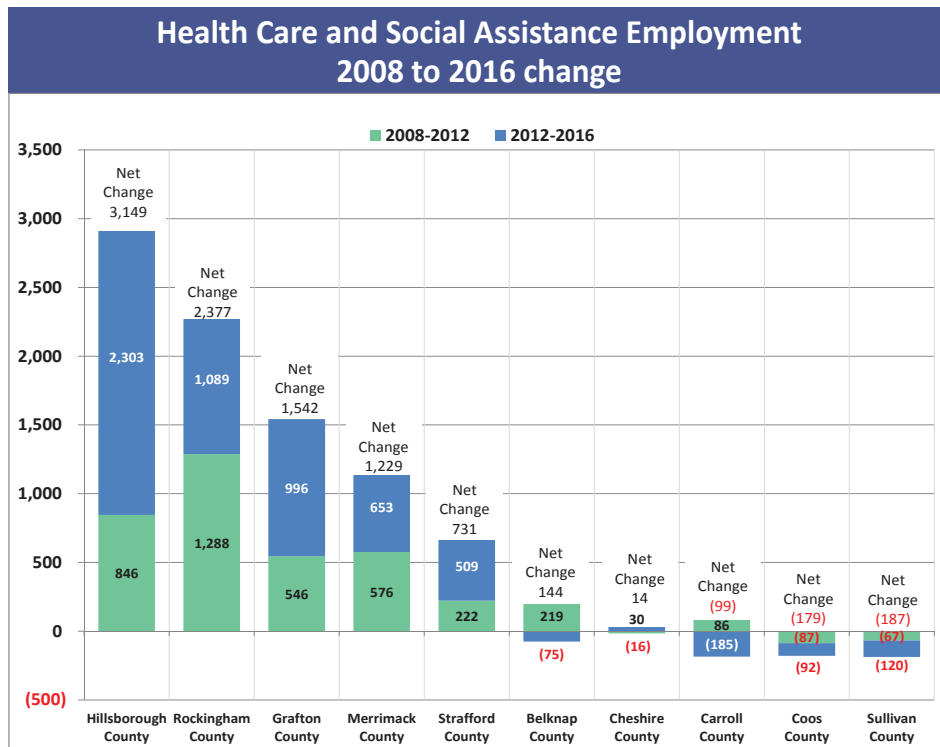
Statewide, *Health care and social assistance* firms added more than 3,520 jobs from 2008 to 2012; gains were shared among seven counties. From 2008 to 2012, establishments in Rockingham County added almost 1,300 jobs, followed by Hillsborough County with over 800 additional jobs. Merrimack and Grafton counties each added over 500 jobs, while both Strafford and Belknap counties added over 200 jobs, and Carroll County added just shy of 100 jobs.

Three counties, Cheshire, Coös, and Sullivan, each shed jobs in the sector during this period.

From 2012 to 2016, roughly 5,000 jobs were added to the *Healthcare and social assistance* sector statewide. *Healthcare and social assistance* businesses in Hillsborough County gained more than 2,300 jobs; those in Rockingham and Grafton counties added roughly 1,100 and 1,000 jobs, respectively. Businesses in Strafford and Merrimack counties added 500 and 600 jobs. Facilities in Cheshire County gained enough jobs to mitigate the losses of the 2008 to 2012 period. *Health care and social assistance* establishments in Carroll, Sullivan, Carroll and Belknap counties each trimmed jobs during this period.

Administrative and Waste Services

Roughly 7,400 *Administrative and waste services* jobs were added in New Hampshire from 2008 to 2016. During the 2008 to 2012 period, over 700 jobs were added in Hillsborough County and almost 450 jobs were added at firms in Sullivan County. About 300 *Administrative and waste services* jobs were added at firms in Merrimack County, and establishments in Rockingham, Grafton, Carroll, Cheshire and Belknap counties each added between 100 to 150 jobs.



Firms in nine of the ten counties added *Administrative and waste services* jobs from 2012 to 2016. Belknap County lost employment in this sector, as employers trimmed 180 jobs during this period, wiping out gains made between 2008 and 2012.

Accommodation and Food Services

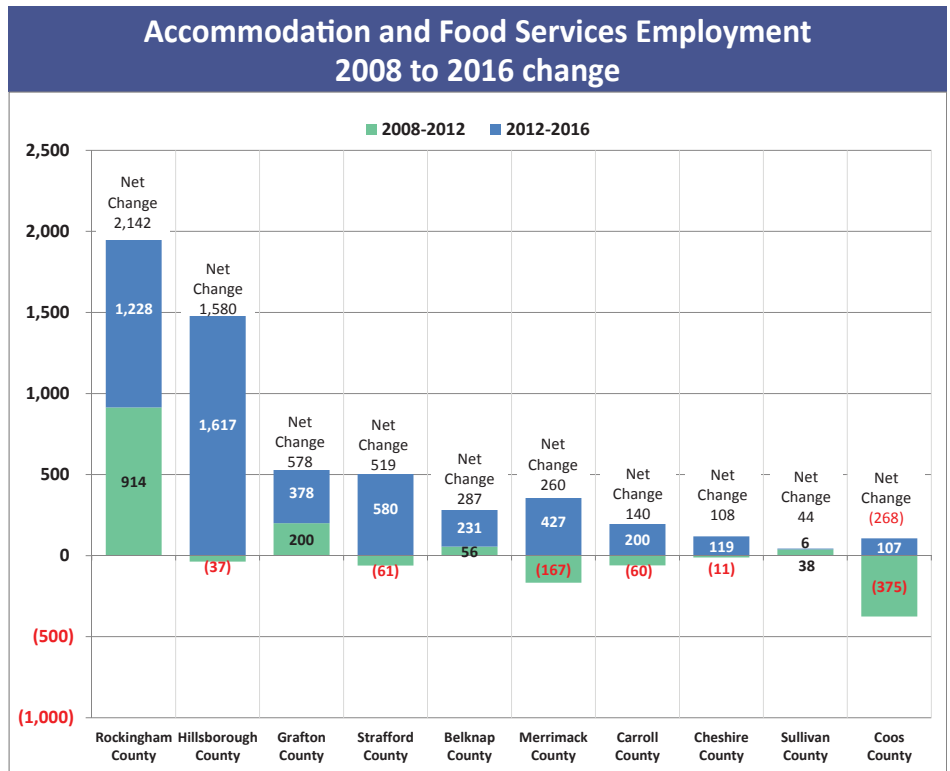
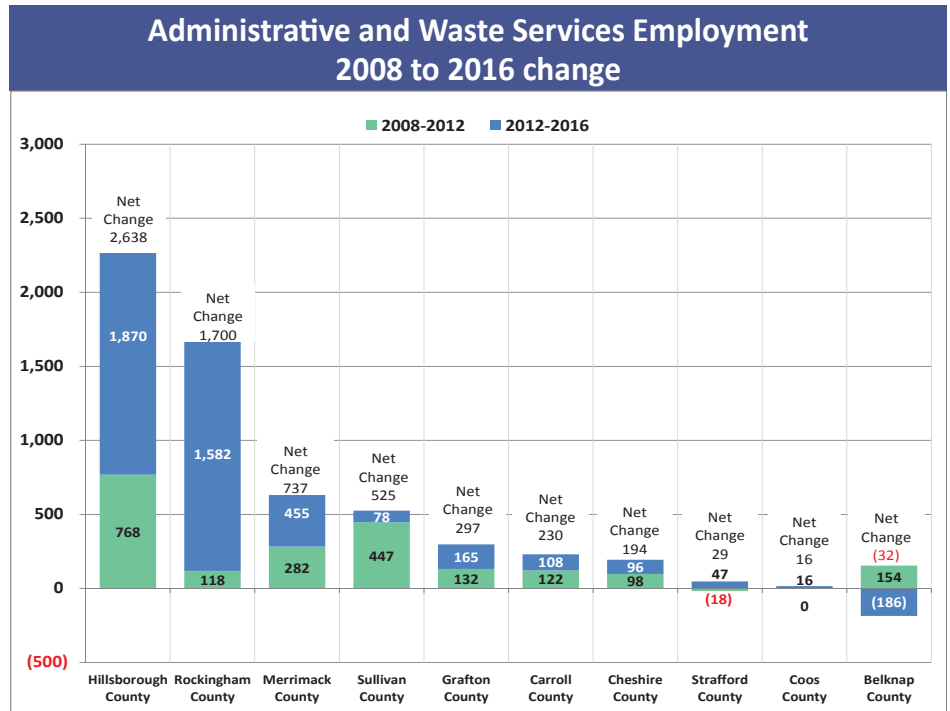
New Hampshire gained around 5,300 jobs in *Accommodation and food services* from 2008 to 2016. Job change patterns were distinctly different between the 2008 to 2012 and the 2012 to 2016 time periods. Although the net change in jobs from 2008 to 2012 was positive, *Accommodation and food services* establishments in six of the ten counties lost jobs. Substantial job gains by businesses in Rockingham and Grafton counties, plus smaller gains by firms in Sullivan and Belknap counties, combined to outweigh job losses in other counties.

Job gains improved between 2012 and 2016, with job gains at *Accommodation and food services* firms seen in all counties.

Professional and Technical Services

From 2008 to 2016, *Professional and technical services* firms netted around 2,900 new jobs; however, there were net job losses in the industry from 2008 to 2012. *Professional and technical services* establishments in half of the counties dropped jobs from 2008 to 2012, with the largest declines in Hillsborough, Strafford, and Rockingham counties. Job gains by firms in the remaining counties were minimal in comparison.

From 2012 to 2016, employment at *Professional and technical services* firms rebounded with the largest gains in Rockingham County. Although there were large job gains at firms in Hillsborough County, they were



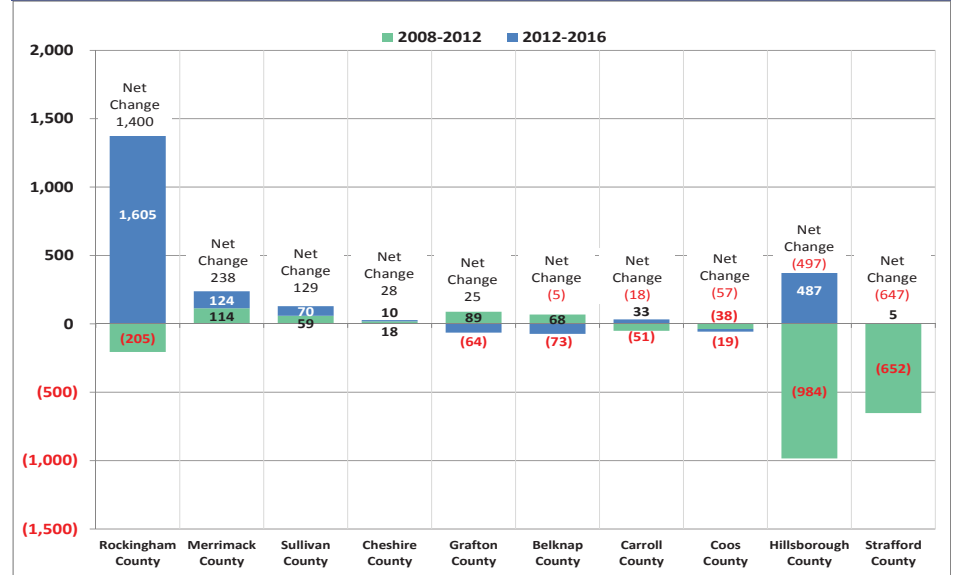
not enough to outnumber the job losses from the 2008 to 2012 period. Employment gains and losses were primarily limited to three counties, reflecting the concentration of *Professional and technical services* in the southeastern part of the state.

Educational Services (Private)

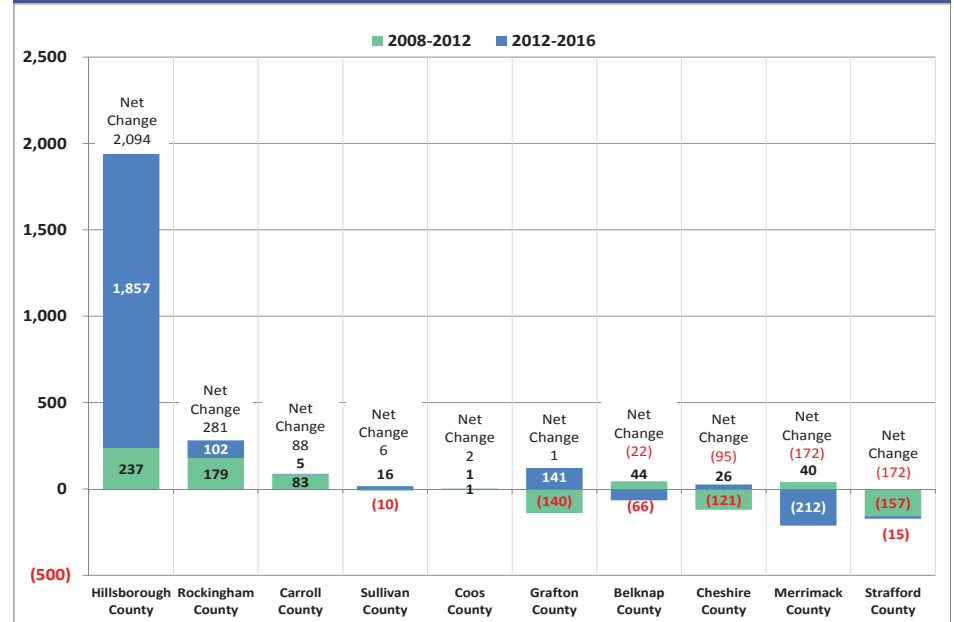
Private *Educational services* establishments in New Hampshire gained about 2,200 jobs from 2008 to 2016, primarily because of large gains in Hillsborough County. Private *Educational services* facilities in four counties, Hillsborough, Rockingham, Carroll, and Coös counties, had job gains in both the 2008 to 2012 and the 2012 to 2016 time periods. In Sullivan, Grafton, and Belknap counties, *Educational services* gained jobs during the 2008 to 2012 period and lost jobs during the 2012 to 2016 period, resulting in minimal job changes. Firms in Cheshire County lost more jobs from 2008 to 2012 than were gained from 2012 to 2016, while in Merrimack County more jobs were lost from 2012 to 2016 than were gained from 2008 to 2012. Private *Educational services* firms in Strafford County trimmed jobs during the entire period.

Overall, from 2012 to 2016, New Hampshire added more than twice the number of jobs lost from 2008 to 2012. Job gains have not, however, been distributed equally by industry sector or by region. Employment change was numerically smaller in New Hampshire counties with lower population levels, primarily Carroll, Belknap, Cheshire, and Coös counties, but this change represented a larger share of employment, creating a bigger impact. There are a few industry

**Professional and Technical Services Employment
2008 to 2016 change**



**Private Educational Services Employment
2008 to 2016 change**



sectors in New Hampshire that have not fully recovered the number of jobs lost from 2008 to 2012, but most sectors experienced net job gains from 2012 to 2016.

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