

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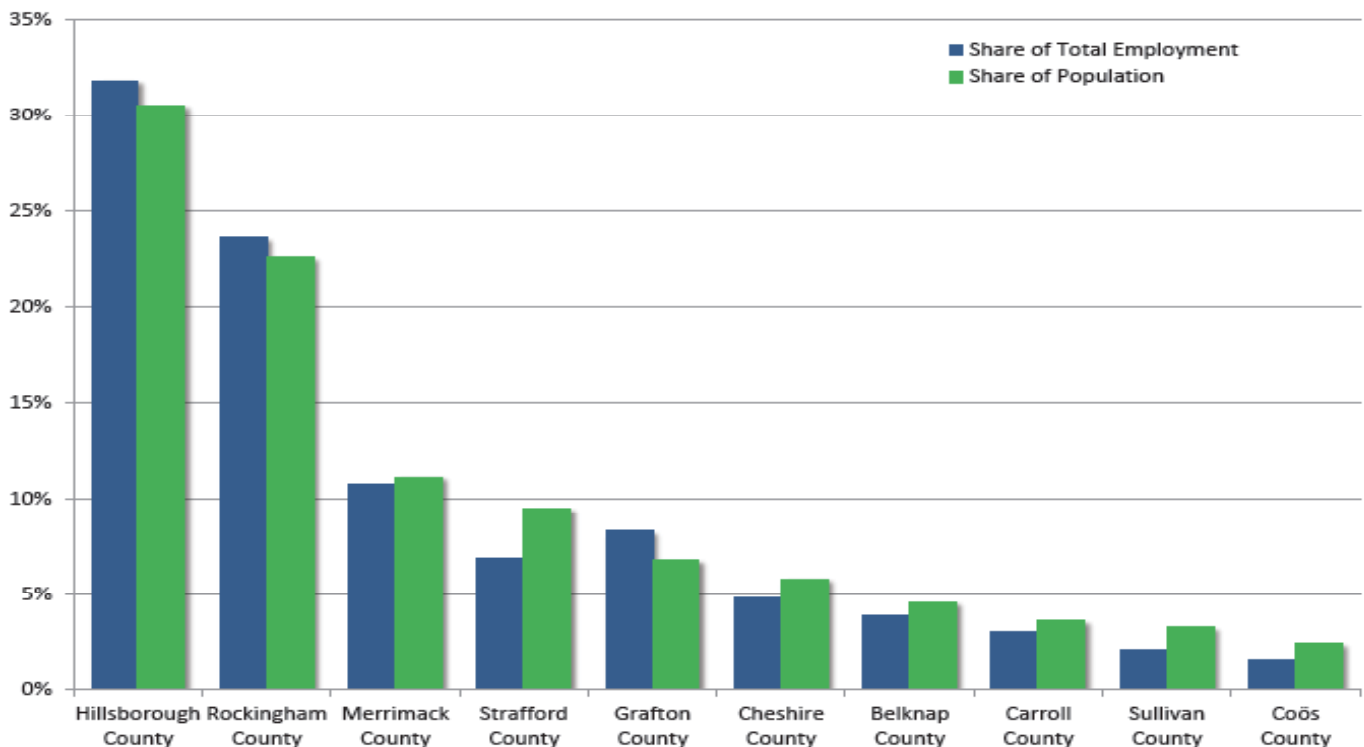
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2008 to 2012 accounted for almost half of all job losses in the state, more than four times the net job losses of any other county. While that was the largest numeric loss for any one county, it represented a 4.1 percent

**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**

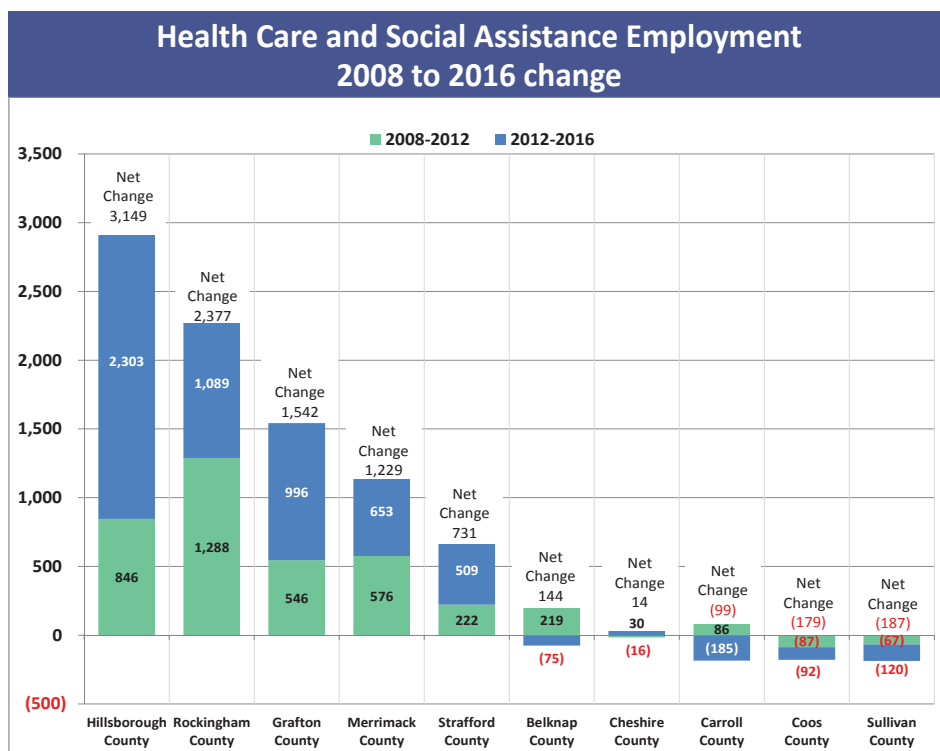
Statewide, *Health care and social assistance* firms added more than 3,520 jobs from 2008 to 2012; gains were shared among seven counties. From 2008 to 2012, establishments in Rockingham County added almost 1,300 jobs, followed by Hillsborough County with over 800 additional jobs. Merrimack and Grafton 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, Carrol 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**

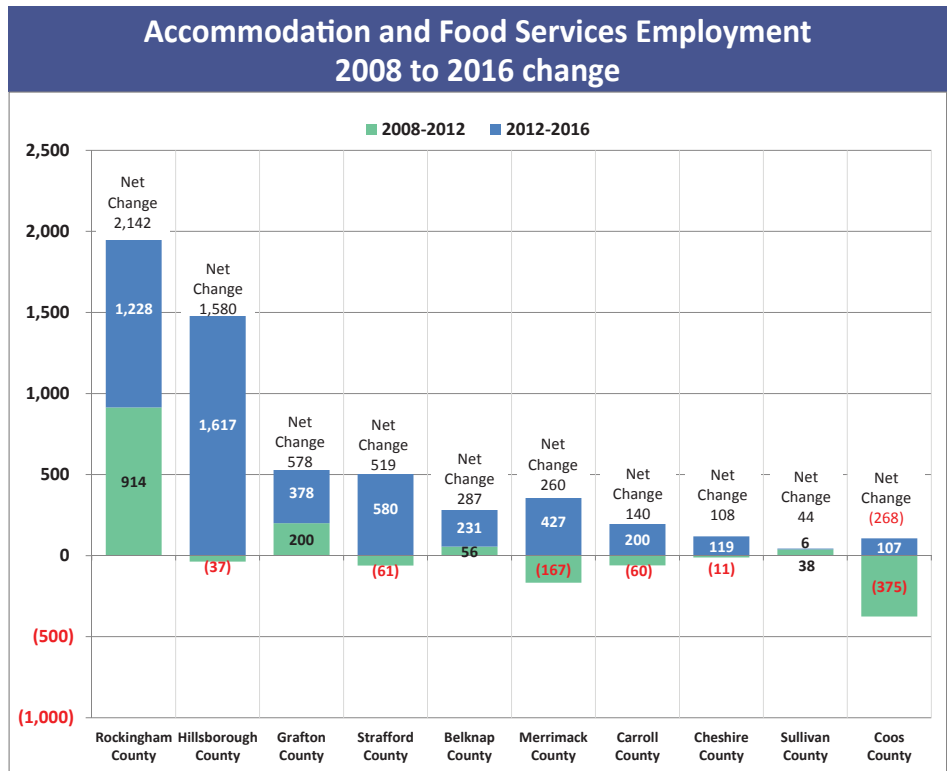
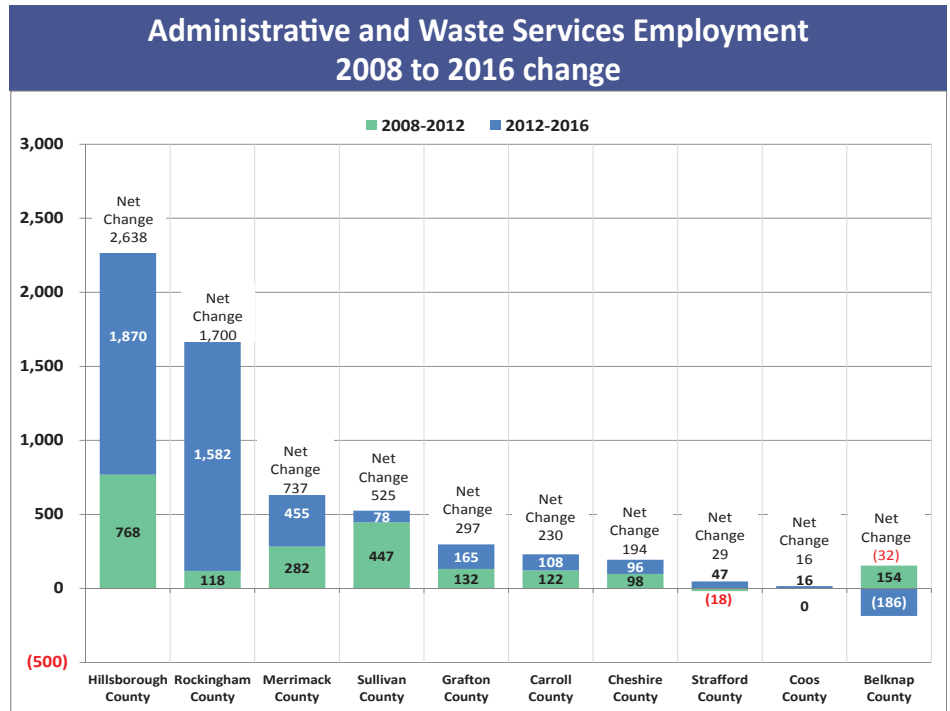
New Hampshire gained around 5,300 jobs in *Accommodation and food services* from 2008 to 2016. Job change patterns were distinctly different between the 2008 to 2012 and the 2012 to 2016 time periods. Although the net change in jobs from 2008 to 2012 was positive, *Accommodation and food services* establishments 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

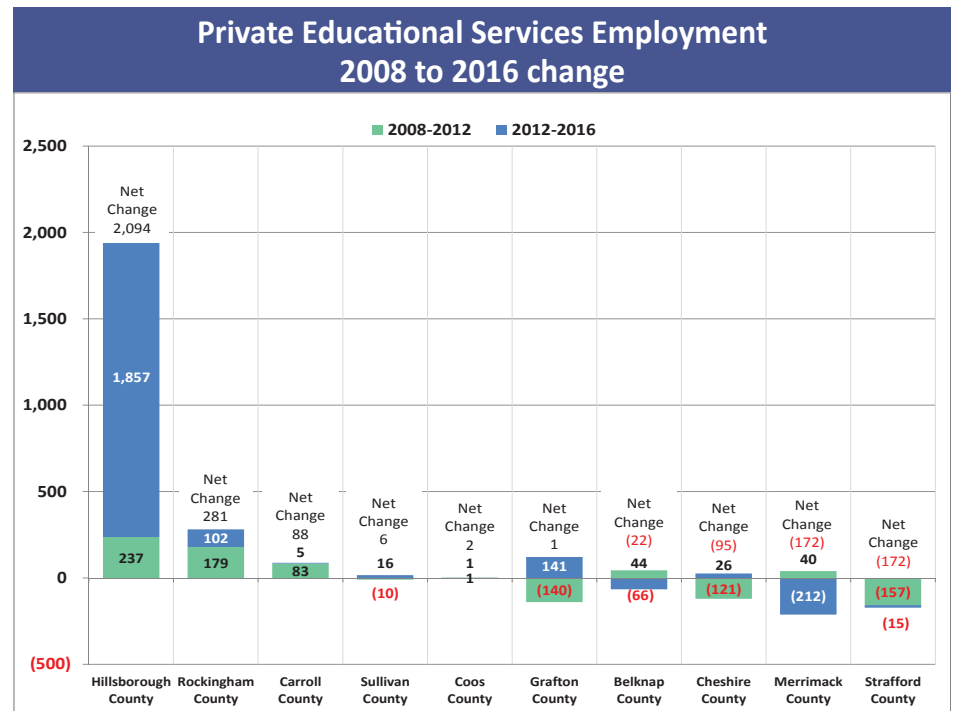
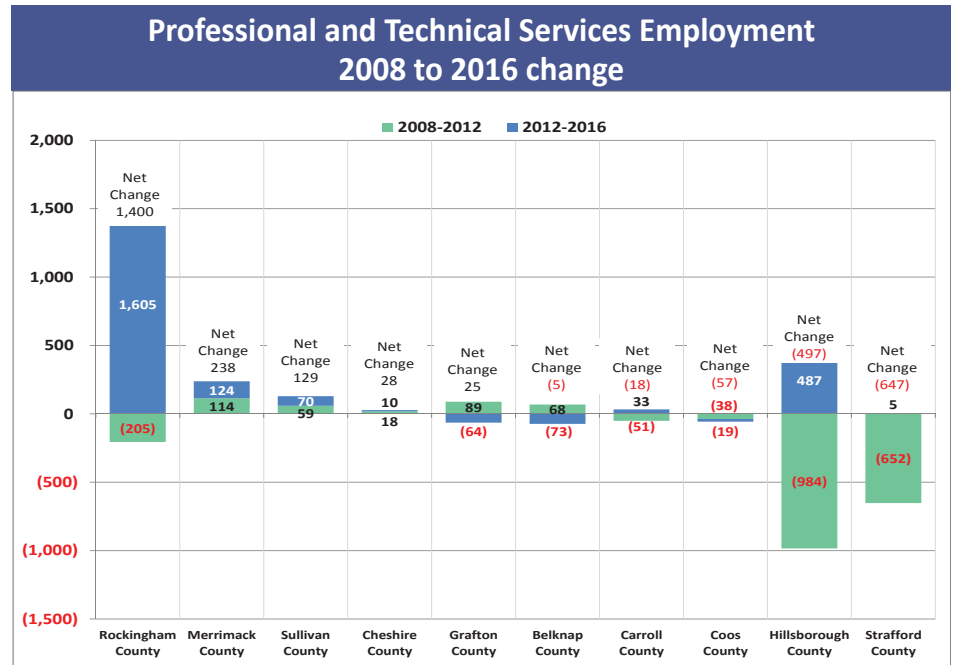


not enough to outnumber the job losses from the 2008 to 2012 period. Employment gains and losses were primarily limited to three counties, reflecting the concentration of *Professional and technical services* in the southeastern part of the state.

**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



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.

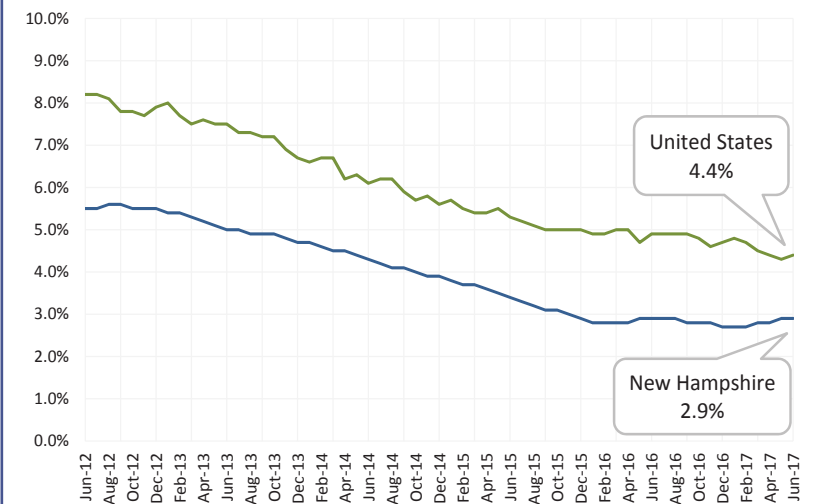
Anita Josten, Research Analyst

## Seasonally Adjusted Estimates

### Unemployment Estimates by Region

Seasonally Adjusted	Jun-17	May-17	Jun-16
United States	4.4%	4.3%	4.9%
Northeast	4.4%	4.4%	4.8%
New England	4.1%	4.1%	4.2%
Connecticut	5.0%	4.9%	5.2%
Maine	3.5%	3.2%	3.9%
Massachusetts	4.3%	4.2%	3.7%
New Hampshire	2.9%	2.9%	2.9%
Rhode Island	4.2%	4.1%	5.4%
Vermont	3.2%	3.2%	3.3%
Mid Atlantic	4.6%	4.5%	5.1%
New Jersey	4.1%	4.1%	5.1%
New York	4.5%	4.4%	4.9%
Pennsylvania	5.0%	5.0%	5.5%

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



### Current Employment Statistics (CES) by Place of Establishment

	Number of Jobs			Change From Previous	
	Jun-17	May-17	Jun-16	Month	Year
Total Nonfarm	677,200	675,200	666,200	2,000	11,000
Total Private	586,700	584,900	575,400	1,800	11,300
Mining and Logging	1,000	1,000	1,000	0	0
Construction	28,100	27,500	25,300	600	2,800
Manufacturing	68,700	68,200	68,200	500	500
Durable Goods	51,900	51,400	50,700	500	1,200
Non-Durable Goods	16,800	16,800	17,500	0	-700
Trade, Transportation, and Utilities	138,700	139,600	139,700	-900	-1,000
Wholesale Trade	27,900	27,900	27,700	0	200
Retail Trade	94,600	94,900	96,000	-300	-1,400
Transportation, Warehousing, and Utilities	16,200	16,800	16,000	-600	200
Information	12,300	12,500	12,500	-200	-200
Financial Activities	38,400	37,700	37,000	700	1,400
Finance and Insurance	31,100	30,500	30,100	600	1,000
Real Estate and Rental and Leasing	7,300	7,200	6,900	100	400
Professional and Business Services	80,000	79,100	77,600	900	2,400
Professional, Scientific, and Technical Services	35,100	35,200	33,800	-100	1,300
Administrative and Support and Waste Management and Remediation Services	36,000	35,000	34,800	1,000	1,200
Education and Health Services	123,600	123,100	120,500	500	3,100
Educational Services	31,600	31,700	31,000	-100	600
Health Care and Social Assistance	92,000	91,400	89,500	600	2,500
Leisure and Hospitality	71,400	71,800	69,500	-400	1,900
Arts, Entertainment, and Recreation	11,100	11,600	11,500	-500	-400
Accommodation and Food Services	60,300	60,200	58,000	100	2,300
Other Services	24,500	24,400	24,100	100	400
Government	90,500	90,300	90,800	200	-300
Federal Government	7,600	7,500	7,700	100	-100
State Government	25,500	25,500	25,000	0	500
Local Government	57,400	57,300	58,100	100	-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](http://www.nhes.nh.gov/elmi/statistics/ces-data.htm)

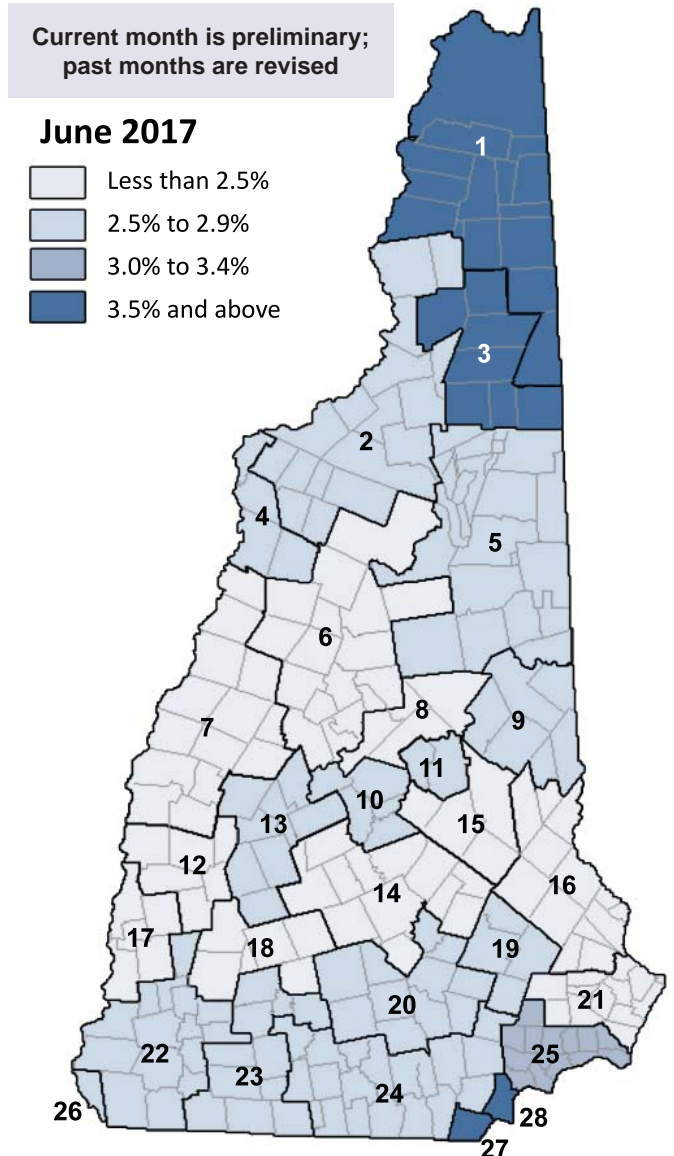
## Not Seasonally Adjusted Estimates by Place of Residence

Labor Force Estimates			
<b>New Hampshire</b>	<b>Jun-17</b>	<b>May-17</b>	<b>Jun-16</b>
Total Civilian Labor Force	760,220	748,100	754,890
Employed	739,990	727,630	733,330
Unemployed	20,230	20,470	21,560
Unemployment Rate	2.7%	2.7%	2.9%
<b>United States (# in thousands)</b>	<b>Jun-17</b>	<b>May-17</b>	<b>Jun-16</b>
Total Civilian Labor Force	161,337	159,979	160,135
Employed	154,086	153,407	151,990
Unemployed	7,250	6,572	8,144
Unemployment Rate	4.5%	4.1%	5.1%

Unemployment Rates by Area			
<b>Counties</b>	<b>Jun-17</b>	<b>May-17</b>	<b>Jun-16</b>
Belknap	2.4%	2.6%	2.6%
Carroll	2.6%	2.9%	3.0%
Cheshire	2.7%	2.7%	2.9%
Coös	3.3%	3.9%	3.7%
Grafton	2.3%	2.5%	2.4%
Hillsborough	2.8%	2.9%	3.0%
Merrimack	2.3%	2.4%	2.6%
Rockingham	2.9%	2.9%	3.0%
Strafford	2.4%	2.4%	2.5%
Sullivan	2.2%	2.3%	2.4%

Map Key	Labor Market Areas	Jun-17	May-17	Jun-16
1	Colebrook, NH-VT LMA, NH Portion	3.8%	4.5%	3.7%
2	Littleton, NH-VT LMA, NH Portion	2.5%	3.0%	3.0%
3	Berlin NH Micropolitan NECTA	3.8%	4.2%	4.0%
4	Haverhill, NH LMA	2.5%	2.5%	2.6%
5	Conway, NH-ME LMA, NH Portion	2.5%	2.8%	2.8%
6	Plymouth, NH LMA	2.4%	2.7%	2.4%
7	Lebanon, NH-VT Micropolitan NECTA, NH Portion	2.1%	2.3%	2.2%
8	Meredith, NH LMA	2.3%	2.5%	2.2%
9	Wolfeboro, NH LMA	2.7%	3.0%	3.4%
10	Franklin, NH LMA	2.5%	2.7%	3.0%
11	Laconia, NH Micropolitan NECTA	2.5%	2.8%	2.8%
12	Claremont-Newport, NH LMA	2.3%	2.3%	2.4%
13	New London, NH LMA	2.5%	2.9%	2.5%
14	Concord, NH Micropolitan NECTA	2.2%	2.3%	2.5%
15	Belmont, NH LMA	2.4%	2.5%	2.6%
16	Dover-Durham, NH-ME Metropolitan NECTA, NH Portion	2.4%	2.4%	2.5%
17	Charlestown, NH LMA	2.0%	2.3%	2.3%
18	Hillsborough, NH LMA	2.4%	2.6%	2.6%
19	Raymond, NH LMA	2.5%	2.5%	2.6%
20	Manchester, NH Metropolitan NECTA	2.7%	2.7%	2.8%
21	Portsmouth, NH-ME Metropolitan NECTA, NH Portion	2.4%	2.4%	2.5%
22	Keene, NH Micropolitan NECTA	2.7%	2.7%	2.8%
23	Peterborough, NH LMA	2.5%	2.7%	2.9%
24	Nashua, NH-MA NECTA Division, NH Portion	2.9%	3.0%	3.2%
25	Seabrook-Hampstead Area, NH Portion, Haverhill-Newburyport-Amesbury MA-NH NECTA Division	3.2%	3.3%	3.5%
26	Hinsdale Town, NH Portion, Brattleboro, VT-NH LMA	2.8%	3.1%	3.7%
27	Pelham Town, NH Portion, Lowell-Billerica-Chelmsford, MA-NH NECTA Division	3.7%	3.6%	4.1%
28	Salem Town, NH Portion, Lawrence-Metuen-Salem, MA-NH NECTA Division	3.7%	3.6%	3.5%

Unemployment Rates by Region			
<b>Not Seasonally Adjusted</b>	<b>Jun-17</b>	<b>May-17</b>	<b>Jun-16</b>
United States	4.5%	4.1%	5.1%
Northeast	4.5%	4.4%	4.9%
New England	4.3%	4.0%	4.3%
Connecticut	5.1%	4.8%	5.4%
Maine	3.6%	3.5%	3.8%
Massachusetts	4.4%	4.1%	4.0%
New Hampshire	2.7%	2.7%	2.9%
Rhode Island	4.2%	3.7%	5.1%
Vermont	3.1%	2.9%	3.4%
Mid Atlantic	4.6%	4.5%	5.1%
New Jersey	4.3%	4.2%	5.2%
New York	4.5%	4.3%	4.7%
Pennsylvania	5.1%	5.2%	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.

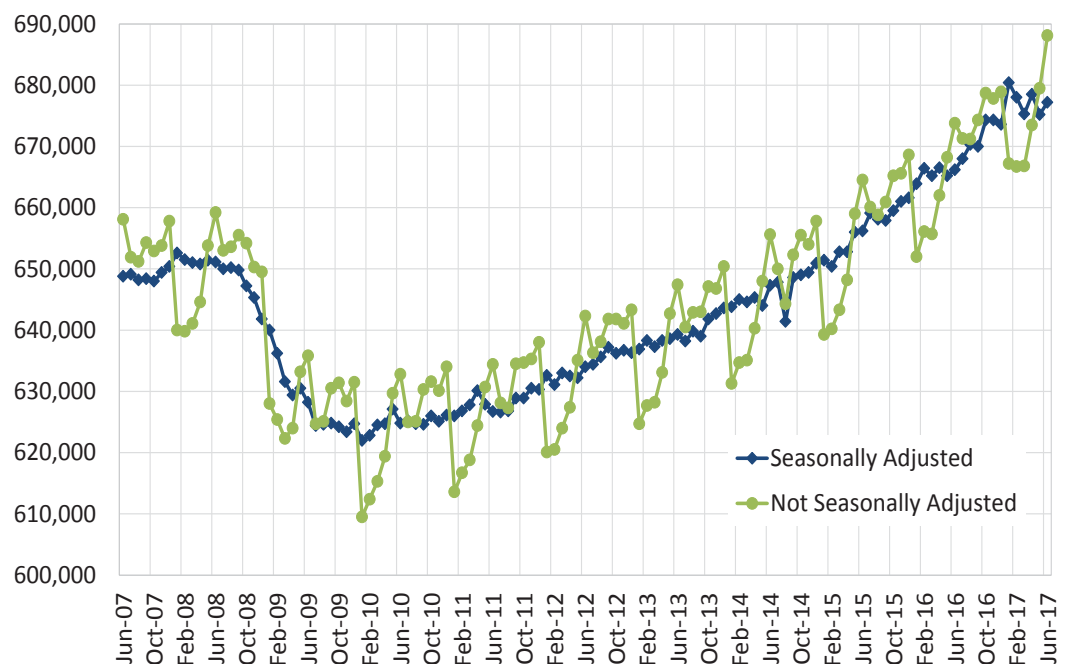
## Monthly Estimates by Place of Establishment

### New Hampshire Nonfarm Employment Statewide Not Seasonally Adjusted

Current month is preliminary; past months are revised

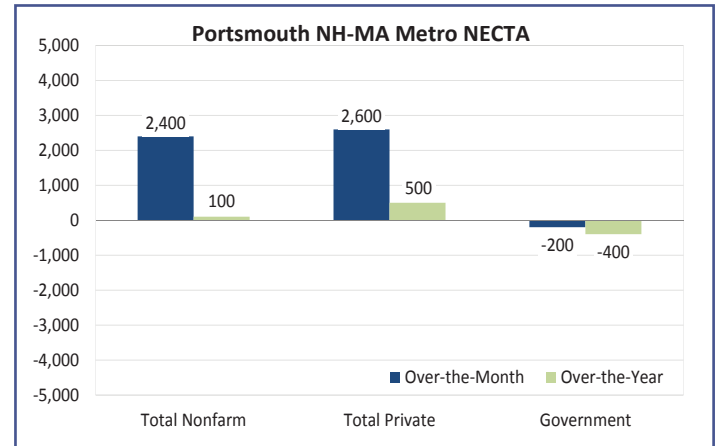
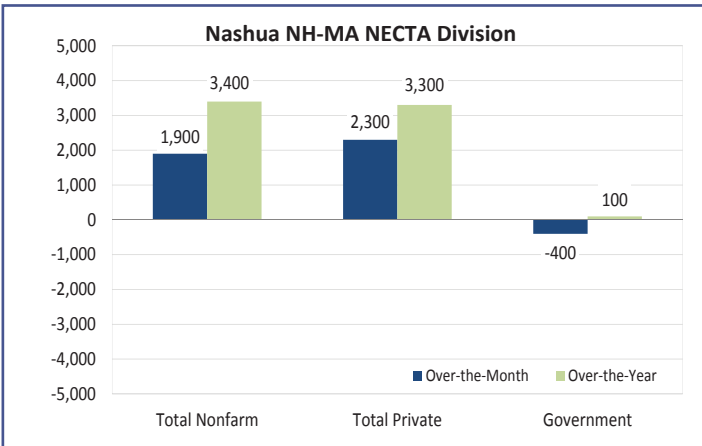
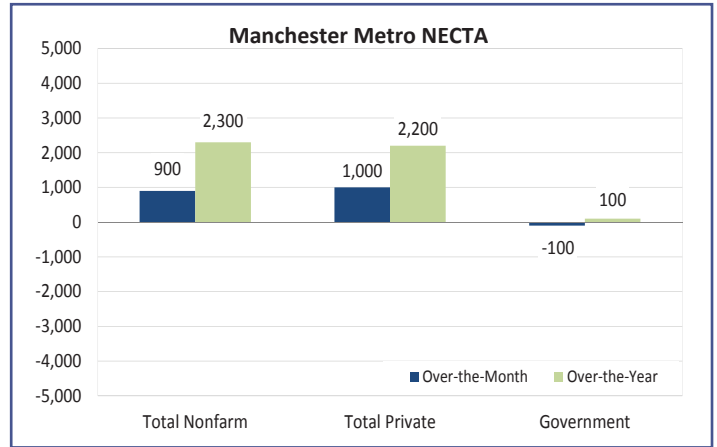
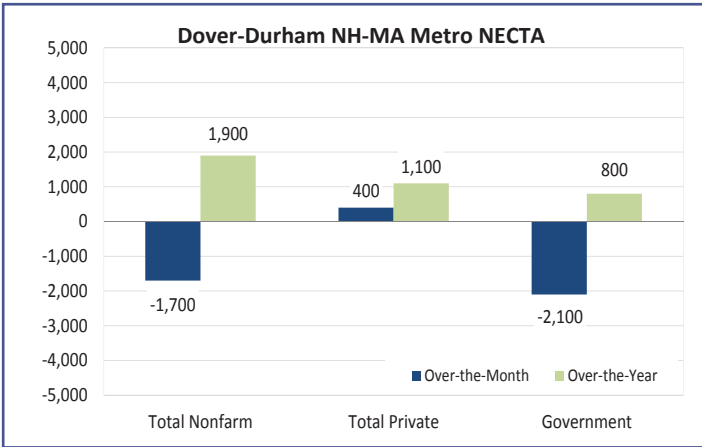
	Number of Jobs			Change From Previous	
	Jun-17	May-17	Jun-16	Month	Year
Total Nonfarm	688,100	679,500	673,800	8,600	14,300
Total Private	600,200	585,700	586,100	14,500	14,100
Mining and Logging	1,000	1,000	1,000	0	0
Construction	29,400	27,900	26,400	1,500	3,000
Manufacturing	69,400	68,300	68,800	1,100	600
Durable Goods	52,400	51,400	51,200	1,000	1,200
Non-Durable Goods	17,000	16,900	17,600	100	-600
Trade, Transportation, and Utilities	141,500	139,300	141,000	2,200	500
Wholesale Trade	27,900	27,700	27,900	200	0
Retail Trade	96,800	94,800	96,900	2,000	-100
Transportation, Warehousing, and Utilities	16,800	16,800	16,200	0	600
Information	12,400	12,500	12,500	-100	-100
Financial Activities	38,800	37,800	37,300	1,000	1,500
Professional and Business Services	81,500	79,400	78,600	2,100	2,900
Education and Health Services	122,400	123,400	120,100	-1,000	2,300
Leisure and Hospitality	79,100	71,500	75,800	7,600	3,300
Other Services	24,700	24,600	24,600	100	100
Government	87,900	93,800	87,700	-5,900	200
Federal Government	7,600	7,500	7,700	100	-100
State Government	22,800	26,300	21,900	-3,500	900
Local Government	57,500	60,000	58,100	-2,500	-600

Total Nonfarm Employment Trend through June 2017

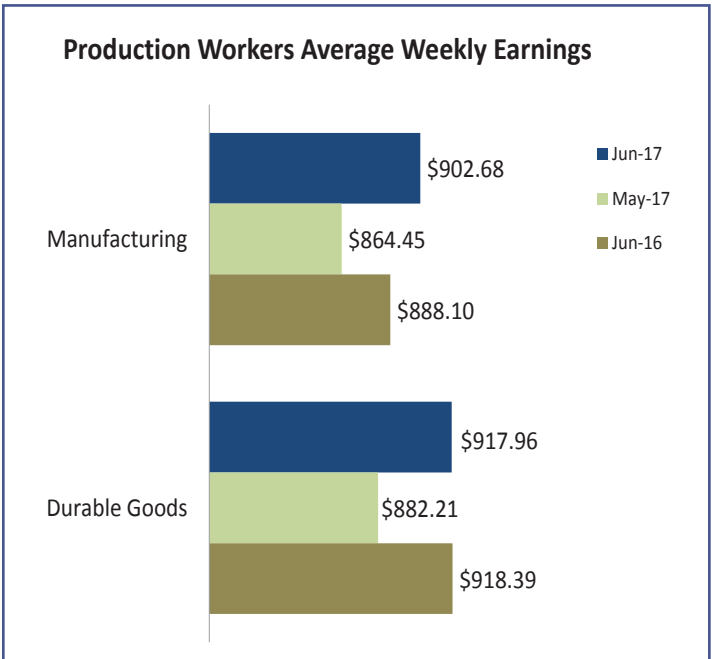
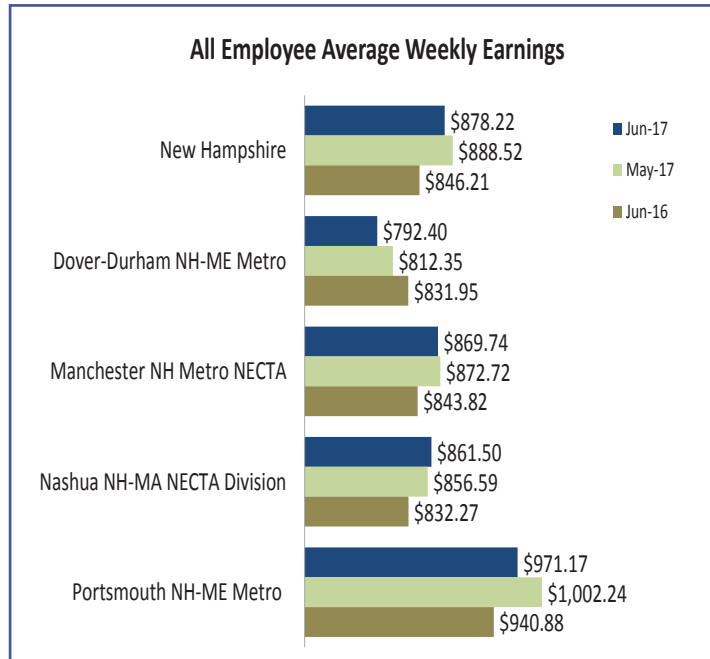


# Not Seasonally Adjusted Estimates by Place of Establishment

## Nonfarm Employment by Metropolitan Statistical Areas - June 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](http://www.nhes.nh.gov/elmi/statistics/ces-data.htm)



## Monthly Analysis of Current Employment Statistics (CES)

### Seasonally Adjusted:

Total Nonfarm employment increased by 2,000 jobs in June, according to preliminary seasonally adjusted estimates.

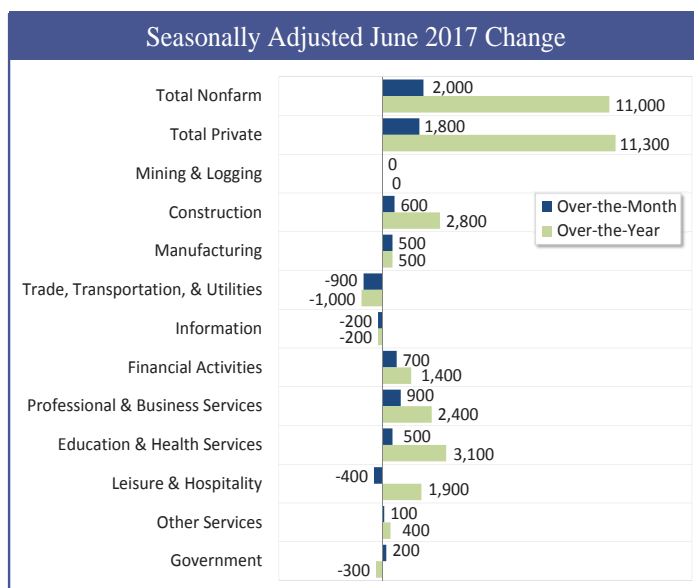
The largest over-the-month increase in employment was in the *Professional and Business Services* supersector, gaining 900 jobs. *Financial Activities* added 700 jobs, while *Construction* expanded payrolls by 600 positions over-the-month. *Private Education and Health Services* and *Manufacturing* each added 500 jobs from May. *Government* and *Other Services* each experienced modest over-the-month employment gains, adding 200 and 100 jobs, respectively.

The largest over-the-month decrease was 900 jobs in *Trade, Transportation, and Utilities*. *Leisure and Hospitality* employment fell by 400 jobs, while *Information* shed 200 positions over-the-month.

Total seasonally adjusted Nonfarm employment increased by 11,000 from June 2016 to June 2017. *Private Education and Health Services*, *Construction*, and *Professional and Business Services* were the main contributors, adding 3,100, 2,800, and 2,400 jobs, respectively. *Leisure and Hospitality* jobs increased by 1,900 over-the-year, and *Financial Activities* expanded employment by 1,400 from June 2016. *Manufacturing* employment grew by 500 jobs, and *Other Services* added 400 jobs over-the-year.

*Trade, Transportation, and Utilities* employment decreased by 1,000 jobs over-the-year, while *Government* trimmed payrolls by 300 jobs, and *Information* lost 200 jobs from June 2016.

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



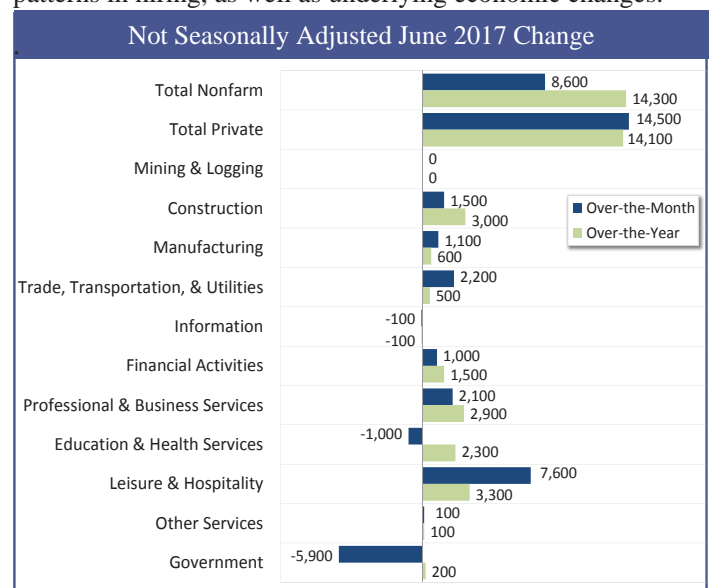
### Unadjusted:

Preliminary unadjusted estimates for June show that Total Nonfarm employment grew by 8,600 jobs over-the-month. *Leisure and Hospitality* accounted for nearly all of the increase, adding 7,600 jobs from May, and *Trade, Transportation, and Utilities* added 2,200 jobs over-the-month. *Professional and Business Services* expanded payrolls by 2,100 positions over-the-month, and *Construction* employment increased by 1,500 from May. *Manufacturing* had significant job gains, adding 1,100 workers over-the-month, and *Financial Activities* added 1,000 positions from May to June. *Other Services* employment increased by 100 jobs over-the month.

Supersectors losing jobs from May to June were *Government*, dropping 5,900 jobs, *Private Education and Health Services*, down 1,000 positions, and *Information* declining by 100 jobs.

Total Nonfarm employment gained 14,300 jobs over-the-year, led by an increase of 3,300 jobs in *Leisure and Hospitality*. *Construction* had the second largest increase, with 3,000 additional jobs each from June 2016. *Professional and Business Services* added 2,900 workers over-the-year, and *Private Education and Health Services* payrolls expanded by 2,300 from June 2016 to June 2017. *Financial Activities* payrolls expanded by 1,500 jobs from June 2016, while *Manufacturing* gained 600 jobs over-the-year. *Trade, Transportation, and Utilities* gained 500 jobs from June 2016, while *Government* added 200 positions, and *Other Services* expanded payrolls by a modest 100 workers over-the year. Only *Information*, dropped cut workers, 100 jobs from June 2016.

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](http://www.nhes.nh.gov/elmi/statistics/ces-data.htm)

### Consumer Price Index

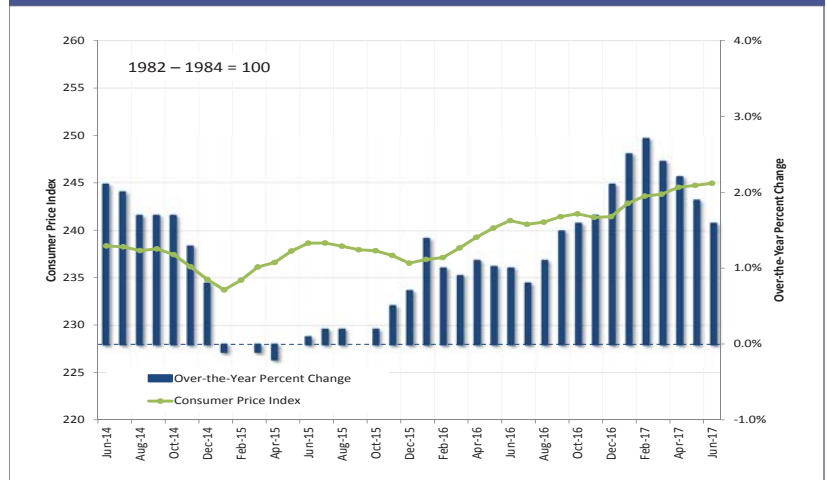
**United States, All Urban Consumers**  
Not Seasonally Adjusted (CPI-U) (1982-1984=100)

			Change from Previous	
Jun-17	May-17	June-16	Month	Year
244.955	244.733	241.018	0.1%	1.6%

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

			Change from Previous	
Jun-17	May-17	June-16	Month	Year
259.335	259.386	255.471	0.0%	1.5%

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



### Unemployment Compensation Claims Activity

	Jan-17	Feb-17	Mar-17	Apr-17	May-17	Jun-17
Initial Claims	3,775	2,803	2,713	2,701	2,350	2,778
Continued Weeks Claimed	24,348	20,110	20,268	17,967	15,424	13,880
Average payment for a week of unemployment	\$317.03	\$319.68	\$316.35	\$321.94	\$325.76	\$338.97

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Nashua . . . . .	882-5177	Portsmouth . . . . .	436-3702
Salem . . . . .	893-9185	Somersworth . . . . .	742-3600

Claims calls: 1-800-266-2252



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