

# ECONOMIC CONDITIONS in New Hampshire



November 2004

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**New Hampshire**  
**ELMIB**  
Economic & Labor Market Information Bureau

## New Hampshire employment approaching pre-recession peak

Since the 2001 recession, the number of jobs lost in New Hampshire has been a major concern. The most recent data available – first quarter 2004 – showed that total employment in the state is on the recovery and is approaching the levels of first quarter 2001. The March 2004 total employment level was about 5,000 jobs behind that of March 2001. Private employment (government employees excluded) for March 2004 lagged behind the March 2001 level by 10,500 jobs.

This overall picture did not show that some industries actually gained jobs, despite the recession. Vice versa, employment in other industries lost more jobs than the overall picture suggests.

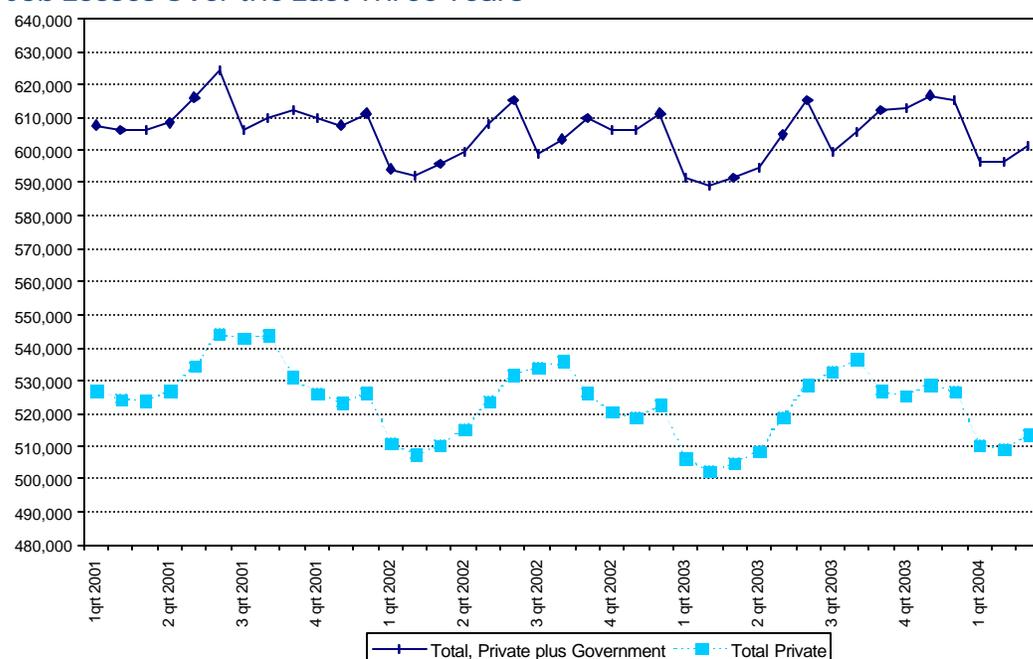
### Employment

The last three years of data showed that employment was at its lowest point in February 2003 for both Private employment and total employment (private plus government).

Health care and social assistance gained the most jobs with 5,622. Total government followed with more than 5,300 additional jobs. Construction and Accommodation and food services followed with gains of about 2,300 jobs each. Despite the net job increases at the sector level, Social assistance and Accommodations were both subsectors that lost employment from first quarter 2001 to first quarter 2004. Social assistance only lost 31 jobs whereas Accommodation showed

**Continued on page 2**

### Increases in Government Employment Softened the Effects of the Total Job Losses Over the Last Three Years



**Continued from page 1**

net losses of 137 jobs. On the other hand Local government gained 4,506 jobs and subsectors such as Food services and drinking places, Hospitals, and Ambulatory health care services gained in between 2,100 and 2,400 jobs.

On the downside were Manufacturing, Information, Professional and technical services, and Transportation and warehousing. All but one subsector in Manufacturing saw a net decrease in employment from first quarter 2001 to first quarter 2004. Nonmetallic mineral product manufacturing was the exception with a net gain of 20 jobs. Overall, Computer and electronic product manufacturing was the subsector which had the largest loss of jobs (9,500). Despite negative net growth in employment, new jobs were created; it is just that more jobs were lost than were created. Even though the largest job losses by far were in Manufacturing, some industry leaders see signs of optimism.

In the Information sector, Publishing industries (except Internet) lost more

than 1,400 jobs from first quarter 2001 to first quarter 2004. This sector includes Newspapers, periodical, book and directory publishers and Software publishers. Computer systems design and related services drove the job losses within Professional and technical services, shedding more than 1,800 jobs. Other industry groups within Professional and technical services, like Legal services, Accounting and bookkeeping services, and Architectural and engineering services gained between 100 to 400 jobs each. Other professional and technical services, which includes Marketing research, Photographic services, Translation and interpretation services, and Veterinary services, also gained close to 350 jobs.

**Wages**

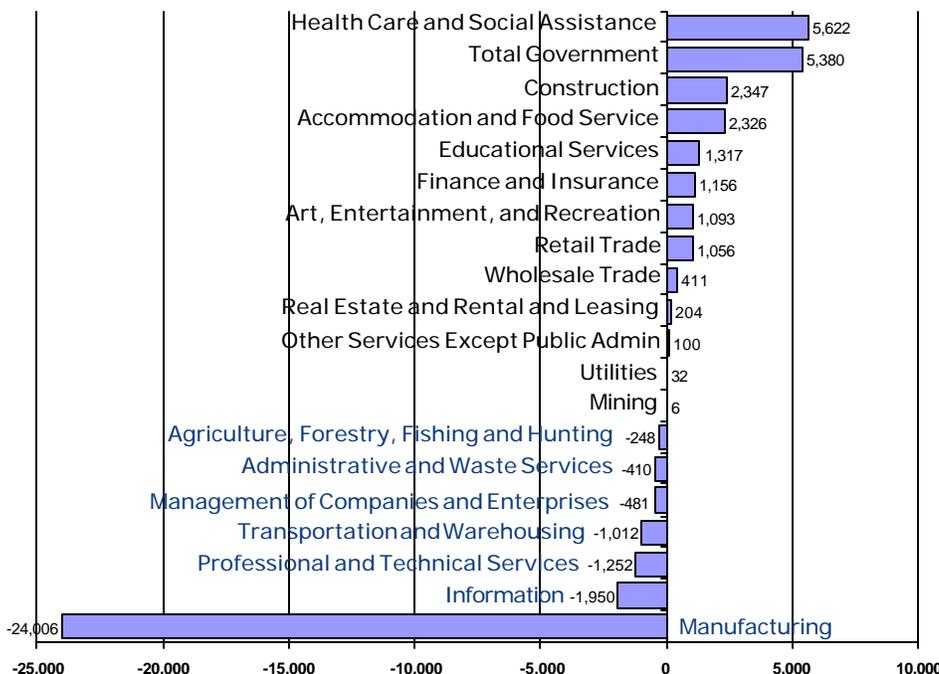
When comparing quarterly average weekly wages by sector over the last three years it does not seem that employment losses necessarily meant a drop in average weekly wage. In other words a job in Information, Professional and technical services or Manufacturing still pays at least \$200 to \$400 more on average than

a job in Government or Health care and social assistance. The average weekly wage for jobs in the gaining industries is lower than the average weekly wage in the declining industries.

However, if we look at the impact of total wages on New Hampshire's economy, the loss in total wages from jobs in Manufacturing and losses in payroll from jobs in Information and Professional and technical services were made up by the increase in total wages from jobs in Government, Health care and social assistance, and by payroll increases in Construction. Overall, total wages increased by 5.8 percent over the three-year period.

*Annette Nielsen*

**Manufacturing Lost Close to a Quarter of its Workforce from First Quarter 2001 to First Quarter 2004**



## Frequently Asked Questions

### What is QCEW?

QCEW is yet another acronym from BLS (Bureau of Labor Statistics). Quarterly Census of Employment and Wages is the "new" name for the old name "ES-202" or "covered employment and wages". The reason why this data set is called quarterly is because wages and employing units are reported for the whole quarter, whereas the number of people employed is reported for each of the months in that quarter. Quarterly employment data is more current than annual average employment data and gives a better picture of the seasonal dynamics of the labor market.

### Where can I find quarterly employment and wages?

From the Economic and Labor Market Information Bureau's homepage you go to **Report/Publications** and to **Economic Statistics** or you can go directly to <[www.nhes.state.nh.us/elmi/covempwagquart.html](http://www.nhes.state.nh.us/elmi/covempwagquart.html)>.

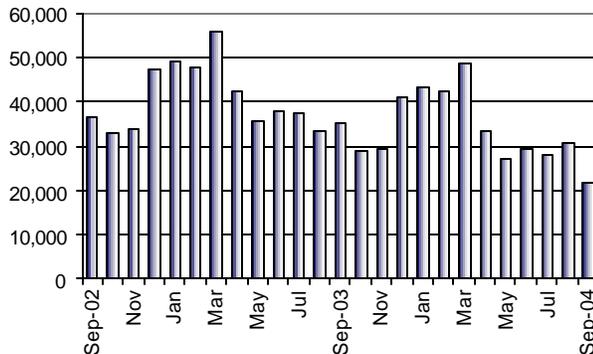
Quarterly Census of Employment and Wages are published for New Hampshire statewide and by counties.

## Unemployment Compensation Claims Activity

Total Regular Unemployment Compensation Programs:	Change from Previous						
				Month		Year	
	Sep-04	Aug-04	Sep-03	Net	Percent	Net	Percent
Initial Claims	2,853	3,254	4,594	-401	-12.3%	-1,331	-31.8%
Continued Weeks	21,405	30,758	35,009	-9,353	-30.4%	-7,708	-26.5%

## Unemployment Compensation Fund

Unemployment compensation fund balance at the end of September	\$243,224,365.18
Average payment for a week of total unemployment:	\$261.06
Net benefits paid:	\$5,135,559.92
Net contributions received during the month:	\$292,136.78
Interest Received:	\$3,303,907.60
Reed Act Distribution:	\$0.00
Reed Act Withdrawal for Administrative Costs:	\$459.32



## Claims Activity

## Trust Fund

## Continued Weeks Claimed

### Sep. 2002 - Sep. 2004

The over-the-month decline in continued weeks claimed was widespread across the state.

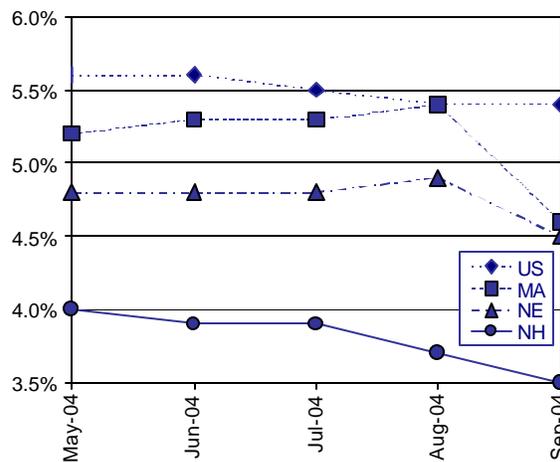
Sep-04	Aug-04	Sep-03	Change from Previous	
			Month	Year
189.9	189.5	185.2	0.2%	2.5%

United States  
All Urban Areas (CPI-U)  
(1982-1984=100)

## Consumer Price Index

## N.H. and U.S. Seasonally Adjusted Unemployment Rates

In September, New Hampshire's seasonally adjusted unemployment rate dropped to 3.5%, a level not seen in the state since the summer of 2001.



### Unemployment Rates by Region

	preliminary Sep-04	revised Aug-04	Sep-03
United States	5.4%	5.4%	6.1%
Northeast	5.1%	5.3%	5.8%
New England	4.5%	4.9%	5.5%
Connecticut	4.7%	4.6%	5.5%
Maine	4.7%	4.5%	5.2%
Massachusetts	4.6%	5.4%	5.9%
New Hampshire	3.5%	3.7%	4.3%
Rhode Island	5.0%	5.5%	4.9%
Vermont	3.3%	3.3%	5.0%
Mid Atlantic	5.3%	5.5%	6.0%
New Jersey	4.8%	4.8%	5.8%
New York	5.5%	5.6%	6.4%
Pennsylvania	5.3%	5.6%	5.4%

## Seasonally Adjusted Labor Force Estimates

By Place of Residence

	May-04	Jun-04	Jul-04	revised Aug-04	preliminary Sep-04
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### New Hampshire

Unemployment Rate	4.0%	3.9%	3.9%	3.7%	3.5%
Civilian Labor Force	726,890	728,990	731,740	730,470	729,400
Number Employed	697,740	700,600	702,940	703,730	703,760
Number Unemployed	29,150	28,390	28,800	26,740	25,640

### United States (in thousands)

Unemployment Rate	5.6%	5.6%	5.5%	5.4%	5.4%
Civilian Labor Force	146,974	147,279	147,856	147,704	147,483
Number Employed	138,772	139,031	139,660	139,681	139,480
Number Unemployed	8,203	8,248	8,196	8,022	8,003

## Seasonally Adjusted Nonfarm Employment

By Place of Establishment

Supersector	May-04	Jun-04	Jul-04	revised Aug-04	preliminary Sep-04
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Total Nonfarm	626,600	626,600	626,600	628,000	628,400
Construction	29,900	30,400	30,500	30,400	30,500
Manufacturing	77,500	78,300	78,600	78,300	78,300
Trade, Transportation, and Utilities	142,300	142,300	141,200	141,900	142,600
Leisure and Hospitality	65,100	65,900	65,700	66,400	64,500
Government	91,600	90,000	89,700	90,600	92,300

**Labor Force Estimates**

New Hampshire	Sep-04	Aug-04	Sep-03
Number of workers	preliminary	revised	
Total Civilian Labor Force	722,420	739,630	715,490
Employed	698,650	712,590	686,490
Unemployed	23,770	27,040	29,000
Unemployment Rate (percent of labor force)	3.3%	3.7%	4.5%

**Unemployment Rates by Area**

	preliminary Sep-04	revised Aug-04	Sep-03
<b>U.S and Regional States</b>			
United States	5.1%	5.4%	5.8%
Northeast	4.8%	5.1%	5.6%
New England	4.3%	4.7%	5.2%
Connecticut	4.2%	4.6%	5.0%
Maine	4.1%	3.7%	4.6%
Massachusetts	4.6%	5.3%	5.9%
New Hampshire	3.3%	3.7%	4.1%
Rhode Island	4.6%	5.3%	4.6%
Vermont	2.9%	3.0%	4.3%
Mid Atlantic	5.1%	5.3%	5.8%
New Jersey	4.6%	4.8%	5.7%
New York	5.4%	5.4%	6.3%
Pennsylvania	4.9%	5.4%	5.0%
<b>Labor Market Areas</b>			
Berlin LMA	2.3%	2.8%	3.5%
Seabrook-South Hampton NH			
Portion Boston MA-NH PMSA	6.0%	6.5%	5.2%
Claremont LMA	1.9%	2.3%	2.7%
Colebrook LMA	1.9%	3.1%	4.3%
Concord LMA	2.3%	2.7%	3.1%
Conway LMA	2.0%	2.1%	2.7%
NH Portion Hartford-Lebanon, VT-NH LMA	1.2%	1.3%	1.4%
NH Portion Keene-Brattleboro, NH-VT LMA	2.2%	2.8%	2.5%
Laconia LMA	2.3%	2.5%	3.2%
Lancaster LMA	1.9%	2.8%	3.2%
Salem-Derry, NH Portion			
Lawrence, MA-NH PMSA	6.0%	6.6%	6.9%
Littleton LMA	2.1%	2.2%	2.2%
Pelham, NH Portion Lowell, MA-NH PMSA	5.1%	6.7%	6.4%
Manchester PMSA	3.4%	3.7%	4.2%
Nashua PMSA	4.1%	4.5%	5.3%
Peterborough LMA	3.2%	4.0%	3.5%
Plymouth LMA	1.7%	2.0%	2.5%
NH Portion Portsmouth- Rochester, NH-ME PMSA	3.1%	3.4%	3.7%
<b>Counties</b>			
Belknap	2.3%	2.6%	3.2%
Carroll	1.9%	2.0%	2.4%
Cheshire	2.5%	3.1%	2.8%
Coos	2.2%	2.7%	3.5%
Grafton	1.5%	1.7%	1.9%
Hillsborough	3.7%	4.2%	4.7%
Merrimack	2.3%	2.5%	3.0%
Rockingham	4.7%	5.1%	5.4%
Strafford	3.0%	3.2%	3.8%
Sullivan	1.9%	2.4%	2.6%

Note: 2003 preliminary benchmark figures are pending final review by the Bureau of Labor Statistics, Washington, D.C. and are subject to change.

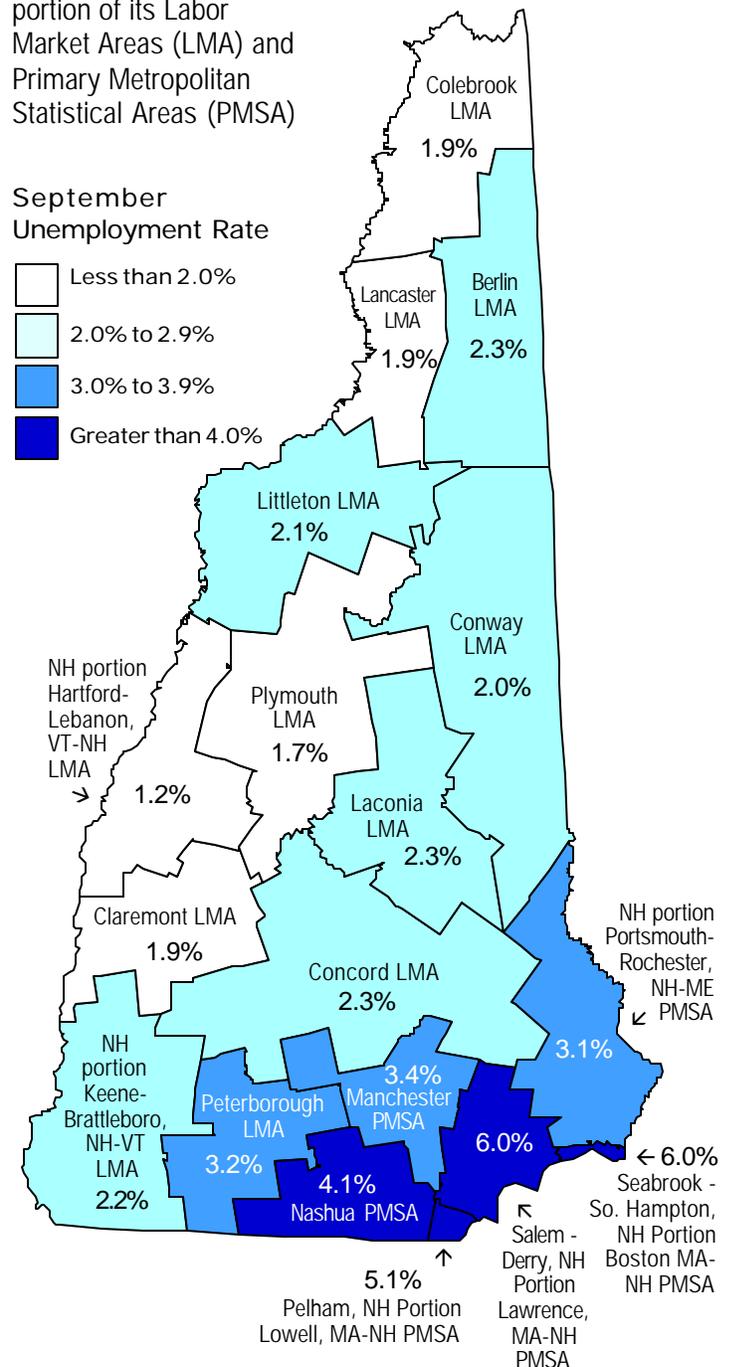
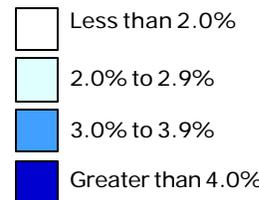
Local Area  
Unemployment  
Statistics  
(LAUS)

Not Seasonally  
Adjusted

By Place of Residence

Unemployment rates in the New Hampshire portion of its Labor Market Areas (LMA) and Primary Metropolitan Statistical Areas (PMSA)

September  
Unemployment Rate



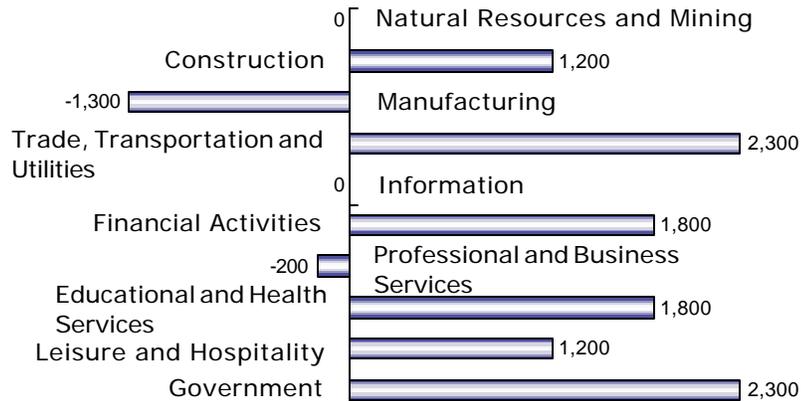
**Monthly Not Seasonally Adjusted New Hampshire Nonfarm Wage and Salary Employment**

With an over-the-year increase in most super-sectors, employment in the state increased by nearly 9,000 from September 2003 to September 2004.

Current Employment Statistics Employment by Super Sector by place of establishment	Number of Jobs			Change from previous:	
	Sep-04	Aug-04	Sep-03	Month	Year
	(preliminary)	(revised)			
Total All Super Sectors	631,100	629,700	622,200	1,400	8,900
Private Employment Total	539,400	549,100	532,800	-9,700	6,600
Natural Resources & Mining	1,000	1,000	1,000	0	0
Construction	31,900	32,200	30,700	-300	1,200
Manufacturing	78,200	78,200	79,500	0	-1,300
Durable Goods	59,500	59,400	59,000	100	500
Non-Durable Goods	18,700	18,800	20,500	-100	-1,800
Trade, Transportation and Utilities	141,600	142,200	139,300	-600	2,300
Wholesale Trade	27,900	28,000	27,000	-100	900
Retail Trade	97,400	98,700	96,200	-1,300	1,200
Transportation and Utilities	16,300	15,500	16,100	800	200
Information	11,500	11,600	11,500	-100	0
Financial Activities	39,000	38,900	37,200	100	1,800
Professional and Business	54,400	55,000	54,600	-600	-200
Educational and Health	94,900	94,800	93,100	100	1,800
Leisure and Hospitality	67,300	75,300	66,100	-8,000	1,200
Other Services	19,600	19,900	19,800	-300	-200
Government Total	91,700	80,600	89,400	11,100	2,300

**Change in Nonfarm Employment**

Sep. 2003 to Sep. 2004



**Monthly Analysis of Current Employment Statistics (CES) Data**

For further analysis please read the *Detailed Monthly Analysis of Industry Employment Data* on our Web site at <www.nhes.state.nh.us/elmi/nonfarm.htm>

**Seasonally Adjusted:** Seasonally adjusted estimates for September showed that New Hampshire's employment trend line inched up by 400 jobs. Government (supersector 90) contributed 1,700 jobs to the mix, while trade, transportation, and utilities (supersector 40) chipped in 700 jobs for the month. Construction (supersector 20), the remaining published supersector to post a positive number for the month, added 100 jobs

In September, manufacturing (super-sector 30) held its employment at the level set in August.

The completion of the vacation season saw leisure and hospitality (supersector 70) reduce its ranks by 1,900 jobs according to the seasonally adjusted estimates.

**Unadjusted:** The opening of another school year played a major role in New Hampshire's 1,400 additional jobs

*Continued on page 7*

## Monthly Unadjusted Nonfarm Wage and Salary Employment by Primary Metropolitan Statistical Areas

Employment by Sector number of jobs by place of establishment	Manchester PMSA			Nashua PMSA			Portsmouth-Rochester NH-ME PMSA		
	Preliminary Sep-04	Change from previous:		Preliminary Sep-04	Change from previous:		Preliminary Sep-04	Change from previous:	
		Month	Year		Month	Year		Month	Year
Total All Sectors	109,700	600	-600	95,900	1,200	200	127,700	1,600	2,200
Private Employment Total	98,000	0	200	85,500	-400	100	103,600	-1,200	1,200
Natural Resources and Construction	6,600	-100	200	4,400	-100	100	4,800	-100	100
Manufacturing	11,000	100	-500	21,300	100	-200	12,400	100	-100
Trade, Transportation, and Utilities	24,700	100	200	21,000	0	-500	26,500	0	1,100
Wholesale Trade	6,300	0	100	3,700	0	100	4,400	0	0
Retail Trade	14,600	-100	300	15,400	-100	-600	19,700	-100	1,200
Transportation and Utilities	3,800	200	-200	1,900	100	0	2,400	100	-100
Information	3,000	-100	0	1,900	0	0	2,900	0	0
Financial Activities	8,700	0	100	6,500	0	100	7,300	-100	-300
Professional and Business	14,400	-100	-100	8,400	0	500	12,700	0	-300
Educational and Health	16,300	200	-200	11,300	100	100	19,000	100	800
Leisure and Hospitality	9,000	-100	400	7,600	-500	0	13,900	-1,200	-300
Services	4,300	0	100	3,100	0	0	9,800	-800	100
Government Total	11,700	600	-800	10,400	1,600	100	24,100	2,800	1,000

## Average Earnings and Hours of Production Workers in Manufacturing

Sector	Average Weekly Earnings			Average Weekly Hours			Average Hourly Earnings		
	Sep-04 prelim.	Aug-04 revised	Sep-03	Sep-04 prelim.	Aug-04 revised	Sep-03	Sep-04 prelim.	Aug-04 revised	Sep-03
<b>New Hampshire</b>									
All Manufacturing	\$616.54	\$610.35	\$588.93	39.7	39.1	40.2	\$15.53	\$15.61	\$14.65
Durable Goods	\$633.04	\$621.55	\$606.88	41.0	40.1	41.2	\$15.44	\$15.50	\$14.73
Nondurable Goods	\$568.66	\$575.43	\$541.13	35.9	36.1	37.5	\$15.84	\$15.94	\$14.43
<b>Manchester PMSA</b>									
All Manufacturing	\$624.93	\$643.69	\$647.19	37.0	38.8	40.5	\$16.89	\$16.59	\$15.98
<b>Nashua PMSA</b>									
All Manufacturing	\$663.69	\$645.59	\$602.15	41.3	40.4	41.3	\$16.07	\$15.98	\$14.58
<b>Portsmouth-Rochester, NH-MA PMSA</b>									
All Manufacturing	\$609.96	\$592.88	\$573.15	39.1	38.3	38.7	\$15.60	\$15.48	\$14.81

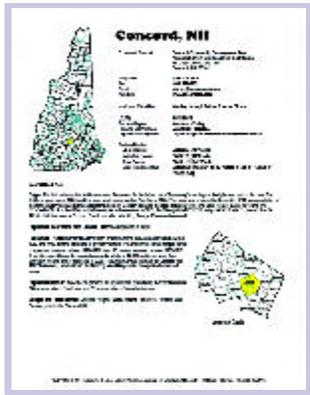
gained in September's unadjusted estimates. As would be expected for the period, government (supersector 90) shifted the employment trend line upward by 11,100 jobs. Education and health services (supersector 65) and financial activities (supersector 55) each added 100 jobs to their respective payrolls.

Employment for natural resources and mining (supersector 10) and manufacturing (supersector 30) stayed at the August number.

For the remaining sectors in New Hampshire's economy, September represented the completion of the summer season.

Leisure and hospitality (supersector 70) led the way in the seasonal reduction by dropping 8,000 jobs. Next came trade, transportation, and utilities (supersector 40) and professional and business services (supersector 60) cutting their workforce by 600 jobs each.

*B. G. McKay*



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Do you know the population of the town you live in? Ever wonder who the largest employer in your town is? Have you ever needed to know the enrollment rate of the schools in your town for planning purposes? Do you know how many residents in your town have at least a bachelor's degree? Do you know your town's annual budget?

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Much of the data was supplied by local municipal offices, without whose assistance this online publication would not be possible. Other sources of the data include the US Census Bureau, NH Office of Energy and Planning, NH Department of Education, NH Department of Revenue Administration, and New Hampshire Employment Security's Economic and Labor Market Information Bureau.

An easy way to find the answers to these question and more is to access the 2004 update of New Hampshire Community Profiles now available online at:

<[www.nhes.state.nh.us/elmi/communpro.htm](http://www.nhes.state.nh.us/elmi/communpro.htm)>

## Employment SECURITY

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