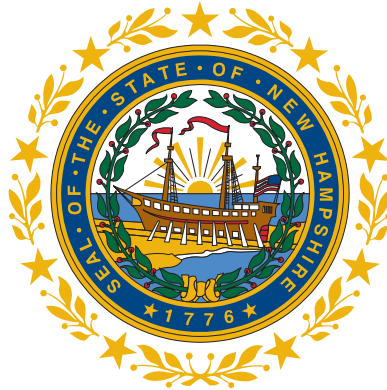


# Impact of the Pandemic on New Hampshire's Labor Market



# **New Hampshire Economic Analysis 2020: Impact of the Pandemic on New Hampshire's Labor Market**



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# The Impact of the Pandemic on New Hampshire's Labor Market

## New Hampshire Snapshot

<b>Population (as of July 1)<sup>a</sup></b>	<b>2019</b>	<b>2018</b>	<b>2015</b>
Total	1,359,711	1,353,465	1,336,350
Male	673,793	670,773	661,455
Female	685,918	682,692	674,895
Median Age	43.1	43.0	42.7
Under 18 years	255,253	257,787	264,783
Age 18 to 64 years	850,594	851,387	852,310
Age 65 and over	253,864	244,291	219,257

<b>Jobs, Average Annual, Not Seasonally Adjusted<sup>b</sup></b>	<b>2019</b>	<b>2018</b>	<b>2015</b>
Total Nonfarm	684,200	678,300	653,800
Total Private	593,800	588,300	563,500
Goods-Producing	100,400	98,500	92,500
Service-Providing	583,800	579,800	561,300
Construction	27,900	27,000	24,200
Manufacturing	71,500	70,600	67,300
Trade, Transportation, and Utilities	139,100	139,400	137,600
Financial Activities	34,800	35,000	34,000
Professional and Business Service	83,700	82,900	78,900
Education and Health Services	124,800	123,100	115,600
Leisure and Hospitality	72,900	72,100	68,500
Government	90,400	90,000	90,300

<b>Employment, Average Annual, Not Seasonally Adjusted<sup>c</sup></b>	<b>2019</b>	<b>2018</b>	<b>2015</b>
Civilian Labor Force	773,740	762,758	745,701
Employed	754,054	743,182	720,583
Unemployed	19,686	19,576	25,118
Unemployment rate	2.5%	2.6%	3.4%
Labor Force Participation rate <sup>d</sup> (population age 16 and over)	69.3	68.7	68.4

<sup>a</sup> U.S. Census Bureau, Annual Estimates of the Resident Population for Selected Age Groups by Sex for New Hampshire

<sup>b</sup> Current Employment Statistics, Not Seasonally Adjusted Estimates, Economic and Labor Market Information Bureau, New Hampshire Employment Security. Benchmark revision March 3, 2020.

<sup>c</sup> Economic and Labor Market Information Bureau, New Hampshire Employment Security

<sup>d</sup> U.S. Census Bureau, Current Population Survey unpublished data (12-month average)

# The Impact of the Pandemic on New Hampshire's Labor Market

## New Hampshire Snapshot

<b>Earnings and Wages</b>	<b>2019</b>	<b>2018</b>	<b>2015</b>
Per Capita Personal Income	\$63,880	\$61,429	\$54,785
Average Weekly Wage <sup>f</sup>			
Total, private plus government	\$1,128	\$1,092	\$1,011
Total private	\$1,145	\$1,106	\$1,022
Goods-Producing	\$1,347	\$1,318	\$1,225
Service-Providing	\$1,102	\$1,062	\$980
Government , Total	\$1,014	\$994	\$937
<b>Housing</b>	<b>2019</b>	<b>2018</b>	<b>2015</b>
Median Single-Family Residential Home Sales Price <sup>g</sup>	\$300,000	\$283,000	\$241,500
Median Gross Rent (2-bedroom units) <sup>h</sup>	\$1,347	\$1,296	\$1,157
Rental Vacancy Rates (2-bedroom units)	0.8%	2.0%	2.2%
Building Permits Issued <sup>i</sup>			
Total Permits	4,743	4,445	3,763
1 unit per structure	2,746	2,710	2,424
2-4 units per structure	230	271	123
5 or more units per structure	1,767	1,464	1,216

<sup>e</sup> U.S. Bureau of Economic Analysis. Data not adjusted for inflation

<sup>f</sup> Economic and Labor Market Information Bureau, New Hampshire Employment Security. Average weekly wages of workers covered by unemployment insurance, not adjusted for inflation. 2019 data are based on 4-quarter average

<sup>g</sup> New England Real Estate Network / New Hampshire Association of Realtors

<sup>h</sup> New Hampshire Housing Finance Authority. Annual Residential Rental Cost Survey

<sup>i</sup> U.S. Census Bureau, New Privately Owned Housing Units Authorized by Building Permits in Permit-Issuing Places in the State of New Hampshire

## The Sudden Death of a Flourishing Economy

The onset of the COVID-19 pandemic in New Hampshire brought parts of the state's economy to a sudden halt. Many of the labor market trends highlighted in this report were first acknowledged in the long-term outlook for New Hampshire. Measures to control the pandemic that required the closing of some businesses and social distancing at others have accelerated ongoing trends. As the pandemic subsides, and as vaccines are developed, social distancing restrictions will ease and personal interactions will increase, but shopping and other cultural habits have likely been permanently altered and prior patterns may not return. It is too early to say what the post-COVID-19 labor market will look like, but it will likely be more technology-driven, with lower density, proximity, and less direct human interaction.

## The Temporary Closure of the New Hampshire Economy

Governor Sununu declared a State of Emergency on March 13, 2020. The State of Emergency did not immediately create large scale economic disruption but became the framework for all executive orders that followed, and that eventually led to restrictions on a broad segment of economic activity in New Hampshire. The following is a timeline of the Governor's executive orders with impacts on the local economy.<sup>1</sup>

**March 15, 2020:** Public schools were directed to close and shift to remote learning. Remote learning was later extended for the remainder of the school year.

This school closure announcement coincided with spring break at many of New Hampshire colleges and universities. Later, all postsecondary institutions closed campuses and finished the semester through online learning.

Some workers in the auxiliary activities related to Educational services were likely laid off, such as cafeteria workers, cleaning, and transportation staff, or were reassigned to other duties. However, the majority of education-related employees were working from home. College and university students and employees were not the only ones impacted by the shutdown. The lack of students and staff on the physical campuses led to reduced spending in their host communities (e.g. Durham, Hanover, Plymouth, Keene, Manchester, and Nashua).

Not seasonally adjusted Current Employment Statistics<sup>2</sup> show a drop in employment in Educational Services (private) from 34,200 in April 2019 to 30,300 in April 2020.<sup>3</sup>

Similarly, State Government Educational Services went from 12,800 in April, 2019 to 11,100 in April 2020.

EDUCATIONAL SERVICES (Private)				STATE GOVERNMENT EDUCATION			
	2019	2020	Over-the-Year-Change		2019	2020	Over-the-Year-Change
March	34,000	32,400	-1,600	March	12,900	12,100	-800
April	34,200	30,300	-3,900	April	12,800	11,100	-1,700
May	33,700	30,500	-3,200	May	12,000	10,300	-1,700
June	25,300	28,600	3,300	June	7,900	7,100	-800

<sup>1</sup> New Hampshire Safer at Home, *Stay at Home 2.0 Timeline*. Accessed on July 23, 2020 at <https://www.covidguidance.nh.gov/timeline>.

<sup>2</sup> Not seasonally adjusted data was used as more detailed data is available. The over-the-year comparison should give a perspective of the employment level during these months. The data source for all the tables in this section is not seasonally adjusted data from New Hampshire Current Employment Statistics.

<sup>3</sup> June 2020 employment in Educational services (private) was higher than June 2019. One factor may have been that the demand for distance learning in the spring and summer sessions may have increased as many students had few other activities lined up for the summer (jobs, internships etc.). Another factor was that Dartmouth College 2020 Commencement was held on June 13-14, 2020 whereas the Dartmouth College 2019 Commencement was held on June 9, 2019 (The Sunday prior to week of week of the 12th). The later end (by a week) of the academic school year could have impacted the survey data results. All other four-year colleges held virtual commencement in May, or postponed until later in the year.

# The Impact of the Pandemic on New Hampshire's Labor Market

**March 16, 2020:** Restaurants were ordered to stop all in-house dining services but were allowed to offer take-out and delivery services.

Employment in Food services and drinking places went from 51,800 in May 2019 to 25,800 in May 2020. Employment improved in May as restaurants were preparing for outdoor dining and June 2020 employment improved even further, yet was still 18,600 below the June 2019 level.

<b>FOOD SERVICES AND DRINKING PLACES</b>			
	<b>2019</b>	<b>2020</b>	<b>Over-the-Year-Change</b>
March	48,700	47,300	-1,400
April	49,900	18,100	-31,800
May	51,800	27,700	-24,100
June	54,000	35,400	-18,600

**March 17, 2020:** The eligibility for unemployment insurance was expanded to help those adversely affected by the COVID-19 pandemic. Eligibility was expanded very broadly to cover all workers either impacted through the temporary closure of their workplace, directly or indirectly affected by the COVID-19 disease (including precautionary self-quarantine), and for the purpose of caring for dependents due to school and child care closures. The expansion also included self-employed person that were temporarily unable to operate their business due to any of the causes previously mentioned.

**March 18, 2020:** The Governor ordered Cannon Mountain, a state operated ski resort, to close for the season. Most other ski resorts had already announced similar closures. This meant that the ski season was cut short and the regular seasonal lay-offs occurred earlier than usual. Many of these resorts offer other recreational activities (such as zip-lining, mountain slides, scenic chair lifts rides etc.) during late spring and summer. These activities were put on hold.

Gathering of 50 persons or more was banned on March 16, 2020. On April 6, an additional executive order extended this gathering precaution to 10 or more. This impacted events such as farmers markets, concerts, arts and crafts fairs, and other festivals.

Minor league baseball postponed the start of season and was cancelled altogether on June 30, 2020. NASCAR postponed their race schedule, delaying the July 19 race in Loudon to August 2, 2020.

Employment in Amusement, gambling and recreation industries went from 8,900 in April 2019 to 1,600 in April 2020. Employment has improved in May and June 2020, yet June 2020 is 5,600 below June 2019.

<b>AMUSEMENT, GAMBLING, AND RECREATION INDUSTRIES</b>			
	<b>2019</b>	<b>2020</b>	<b>Over-the-Year-Change</b>
March	9,800	7,500	-2,300
April	8,900	1,600	-7,300
May	10,300	3,100	-7,200
June	12,100	6,500	-5,600



# The Impact of the Pandemic on New Hampshire's Labor Market

**March 26, 2020:** A stay-at-home order was issued by the Governor, effective at 11:59 p.m. Friday, March 27. Also, nonessential businesses were ordered to close.

**May 1, 2020:** A new stay-at-home order (2.0) was put in effect until May 31.

Total private employment dropped from 587,700 in April 2019 to 484,700 in April 2020, a drop over-the-year of 17.5 percent. Employment improved in May 2020, yet employment was 91,100 jobs below May 2019 and employment in June 2020 was 67,900 below June 2019.

<i>TOTAL PRIVATE</i>			
	<b>2019</b>	<b>2020</b>	<b>Over-the-Year-Change</b>
March	584,300	580,000	-4,300
April	587,700	484,700	-103,000
May	596,200	505,100	-91,100
June	601,600	533,700	-67,900

## The Reopening – cautious and socially distanced

**May 4, 2020:** Elective surgeries were allowed. Hospitals had reduced the hours or furloughed many of their workers if such workers were not directly involved in the COVID-19 triage and care.

Employment at hospitals in June 2020 was 1,800 below the employment level in June 2019, but improving from May 2020.

<i>HOSPITALS</i>			
	<b>2019</b>	<b>2020</b>	<b>Over-the-Year-Change</b>
March	29,700	29,500	-200
April	29,500	28,100	-1,400
May	29,800	27,500	-2,300
June	29,900	28,100	-1,800

# The Impact of the Pandemic on New Hampshire's Labor Market

**May 11, 2020:** Opening of retail stores, dental offices, and hair salons under certain guidelines. Drive-in theaters and golf courses were also allowed to open.

Employment in Ambulatory health care services, which includes dental offices and outpatient health care providers, went from 34,100 in April 2019 to 26,900 in April 2020. Employment did rebound significantly from April to May 2020 and then again from May to June 2020.

<i>AMBULATORY HEALTH CARE SERVICES</i>			
	<b>2019</b>	<b>2020</b>	<b>Over-the-Year-Change</b>
March	34,000	33,900	-100
April	34,100	26,900	-7,200
May	34,200	30,200	-4,000
June	34,400	32,600	-1,800

Employment in Retail trade went from 94,800 in June 2019 to 81,200 in June 2020, a decline over the year of 13,600 jobs. Some improvement was experienced over the prior two months.

<i>RETAIL TRADE</i>			
	<b>2019</b>	<b>2020</b>	<b>Over-the-Year-Change</b>
March	92,000	90,900	-1,100
April	92,700	73,900	-18,800
May	93,500	74,400	-19,100
June	94,800	81,200	-13,600

Employment in Other services went from 25,000 in April 2019 to 20,400 in April 2020. Other services include personal care services (hairstylists, barbers, nail salons etc.), but it also includes many other services, such as repair shops, dry cleaners, funeral homes, etc. Some improvement occurred between April and May-June 2020.

<i>OTHER SERVICES</i>			
	<b>2019</b>	<b>2020</b>	<b>Over-the-Year-Change</b>
March	24,800	26,100	1,300
April	25,000	20,400	-4,600
May	25,100	23,500	-1,600
June	26,300	24,700	-1,600

# The Impact of the Pandemic on New Hampshire's Labor Market

**May 18, 2020:** Opening up for outdoor seating only in restaurants. Outdoor activities such as mini golf, shooting ranges, and paintball were allowed to resume immediately. The governor encouraged more day care facilities to reopen.

**May 29, 2020:** The stay-at-home order was extended to June 15, 2020.

**June 1, 2020:** Seacoast beaches opened for swimming, running and biking. No sunbathing or gathering on the beach was allowed. This was changed on June 5, 2020, to allow sunbathing.

**June 5, 2020:** Lodging facilities were allowed to accept overnight guests at 50 percent of capacity. Out-of-state visitors were required to attest to having quarantined for 14 days prior to arrival.

Employment in Accommodation went from 8,000 in April 2019 to 2,800 in April 2020. Employment levels in May and June 2020 are very low in comparison to historic data for those two months.

ACCOMMODATION			
	2019	2020	Over-the-Year-Change
March	8,300	7,600	-700
April	8,000	2,800	-5,200
May	8,700	3,100	-5,600
June	10,700	5,300	-5,400

**June 11, 2020:** The Governor announced that New Hampshire's Stay-at-Home Order would expire on June 15, 2020 at 11:59 pm.

**June 15, 2020:** Pools, gyms, libraries, etc. were allowed to open following specified guidelines. The cap on gatherings of 10 or less was removed.

**June 22, 2020:** Day camps were allowed to open with overnight camps allowed to open on June 29, 2020. Many camps, however, have opted for a virtual camp, cancelling any onsite camp activities for summer 2020.

**June 29, 2020:** Amusement parks were allowed to open. All types of accommodations were able to operate at 100% capacity.

It is too early to say how quickly all these impacted businesses and industries will resume the economic activity levels of pre-COVID-19 shutdowns, but this timeline explains the extreme and immediate impact that the closure of the economy had on New Hampshire's labor market. The full effect of the stay-at-home expiration order on June 15 will not be evident in the nonfarm employment report before the August 2020 release (reflecting employment of the week of July 12).

# The Impact of the Pandemic on New Hampshire's Labor Market

## The labor market impacts of COVID-19

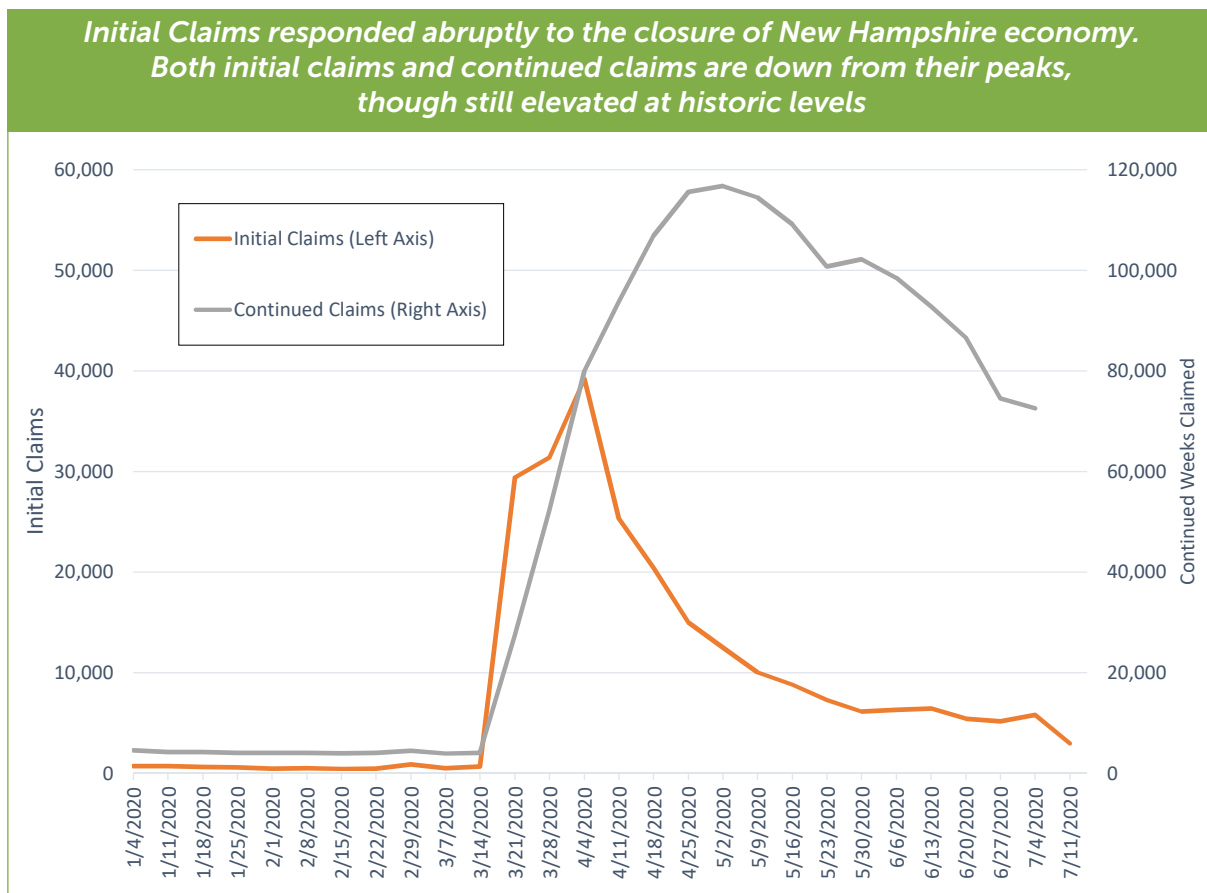
The following charts show how New Hampshire's economy responded to the closures ordered by the Governor through to the improvement of the labor market as the staggered reopening was implemented. In addition, there are some signs of deflated demand due to avoidance, especially in health care and retail trade activities. Longer term, the economic disruption created by the pandemic will demand new goods and services, as social and cultural patterns have shifted (working from home, meeting remotely, staycation, back-yarding and camping).

### Initial claims filed and continued weeks claimed

Initial claims, as an economic measure, is viewed as a leading indicator due to the immediacy of the response to layoffs. As this measure is released on a weekly schedule, with only one week lag, signs of change in the labor market can be detected immediately.

The economic impact of the pandemic hit New Hampshire during the week ending March 21, 2020. This week includes the date when all dine-in options were closed and eligibility for unemployment insurance was expanded. Initials claims filed rose from 642 in week ending March 14, 2020 to 29,379 in week ending March 21, 2020.

With the partial opening of the economy in May and June, initial claims have reached a lower plateau around 5,000 to 6,000 initial claims, but still much elevated from pre-recession weekly level at approximately 400 to 800 (variability depending on the season). After the week of July 4th, initial claims were reduced to about 3,000.



Source: Employment and Training Administration, U.S. Department of Labor

# The Impact of the Pandemic on New Hampshire's Labor Market

Continuing claims are filed for each following week the claimant remains unemployed. This measure lags initial claims by a week and grows higher over time as claims accumulate from week to week. Continued weeks claimed peaked in the week ending May 2, 2020 at 116,768. As the economy reopened and new COVID-19 cases have slowed, continued weeks claimed has declined.<sup>4</sup>

The table below highlights those industries in New Hampshire that experienced the largest volume of initial claims for unemployment since the beginning of the pandemic.

**TABLE 3 - INDUSTRIES WITH THE LARGEST NUMBER OF NEW UNEMPLOYMENT CLAIMS - MARCH 15 TO SEPTEMBER 19**

INDUSTRY	NAICS CODE *	# CLAIMS FILED SINCE MARCH 15	CONTINUING CLAIMS (CCFS) AS OF SEPTEMBER 19	CHANGE FROM PRIOR WEEK	Q4 2019 EMPLOYMENT	SEPT. 12 CONTINUED CLAIMS AS A % OF Q4 2019 INDUSTRY EMPLOYMENT
Food Services and Drinking Places	722	26,308	5,516	-340	49,907	11.1%
Administrative and Support Services	561	11,447	3,714	-123	33,750	11.0%
Ambulatory Health Care Services	621	10,563	1,473	-120	34,431	4.3%
Educational Services	611	8,132	1,542	-185	20,834	7.4%
Social Assistance	624	6,374	1,505	-114	15,809	9.5%
Hospitals	622	6,064	923	-40	30,086	3.1%
Personal and Laundry Services	812	5,097	994	-40	7,306	13.6%
Accommodation	721	4,950	1,273	-50	8,397	15.2%
Professional, Scientific, and Technical Services	541	4,830	1,478	-49	39,171	3.8%
Motor Vehicle and Parts Dealers	441	4,655	953	-33	12,602	7.6%
Amusement, Gambling, and Recreation	713	4,598	890	-56	9,883	9.0%
General Merchandise Stores	452	4,510	1,119	-35	14,817	7.6%
Specialty Trade Contractors	238	4,262	889	-33	18,817	4.7%
Food and Beverage Stores	445	3,654	1,069	-41	22,356	4.8%
Clothing and Clothing Accessories Stores	448	3,446	525	-24	6,029	8.7%
Nursing and Residential Care Facilities	623	2,844	922	-44	14,268	6.5%
Miscellaneous Store Retailers	453	2,660	517	-29	5,449	9.5%
Electronic Computer Manufacturing	334	2,572	487	-6	16,381	3.0%
Transit and Ground Passenger Transportation	485	2,426	749	-299	3,652	20.5%
Fabricated Metal Product Manufacturing	332	2,357	721	-18	11,558	6.2%
General Automotive Repair	811	2,337	476	-24	7,091	6.7%
Religious, Grantmaking, Civic, Professional, and Similar Organizations	813	2,206	473	-44	6,517	7.3%

<sup>4</sup> For more detailed analysis of weekly claims activity, please go to <https://www.nhes.nh.gov/covid-19-unemployment-rates.htm>

# The Impact of the Pandemic on New Hampshire's Labor Market

**TABLE 3 - INDUSTRIES WITH THE LARGEST NUMBER OF NEW UNEMPLOYMENT CLAIMS - MARCH 15 TO SEPTEMBER 19**

INDUSTRY	NAICS CODE *	# CLAIMS FILED SINCE MARCH 15	CONTINUING CLAIMS (CCFS) AS OF SEPTEMBER 19	CHANGE FROM PRIOR WEEK	Q4 2019 EMPLOYMENT	SEPT. 12 CONTINUED CLAIMS AS A % OF Q4 2019 INDUSTRY EMPLOYMENT
Merchant Wholesalers, Durable Goods	423	2,128	545	-29	12,463	4.4%
Electrical Equipment, Appliance, and Component Manufacturing	335	2,063	152	4	4,225	3.6%
Sporting Goods, Hobby, Musical Instrument, and Book Stores	451	1,695	293	-10	4,154	7.1%
Furniture and Home Furnishings Stores	442	1,562	259	-21	2,772	9.3%
Miscellaneous Manufacturing	339	1,466	250	-9	4,430	5.6%
Building Material and Garden Equipment and Supplies Dealers	444	1,458	427	7	9,527	4.5%
Construction of Buildings	236	1,455	398	-5	6,082	6.5%
Merchant Wholesalers, Nondurable Goods	424	1,383	337	-13	8,050	4.2%
Wholesale Electronic Markets and Agents and Brokers.	425	1,344	377	3	7,771	4.9%
Plastics and Rubber Products Manufacturing	326	1,293	314	28	5,422	5.8%
Nonstore Retailers	454	1,139	330	-12	6,181	5.3%
Textile Mills	313	1,056	268	-2	1,822	14.7%
Health and Personal Care Stores	446	1,037	246	-8	4,185	5.9%
Real Estate	531	989	254	-9	4,949	5.1%
Machinery Manufacturing	333	972	326	-3	7,006	4.7%
Primary Metal Manufacturing	331	964	193	-10	2,386	8.1%
Management of Companies and Enterprises	551	951	282	-17	9,284	3.0%
Printing and Related Support Activities	323	944	279	-15	2,297	12.1%
Gas Stations	447	933	291	-8	4,511	6.5%
Electronics and Appliance Stores	443	832	200	-11	2,958	6.8%
Rental and Leasing Services	532	768	207	-5	1,993	10.4%
Industries in the Food Manufacturing	311	765	177	-7	2,771	6.4%
Couriers and Messengers	492	734	231	11	3,721	6.2%
Industries in the Publishing Industries (except Internet)	511	665	193	-3	5,116	3.8%
Transportation Equipment Manufacturing	336	645	226	-3	2,634	8.6%
Performing Arts, Spectator Sports, and Related	711	623	226	2	1,179	19.2%
Insurance Carriers and Related Activities	524	590	195	-11	11,768	1.7%
Motion Picture and Sound Recording Industries	512	531	109	1	890	12.2%

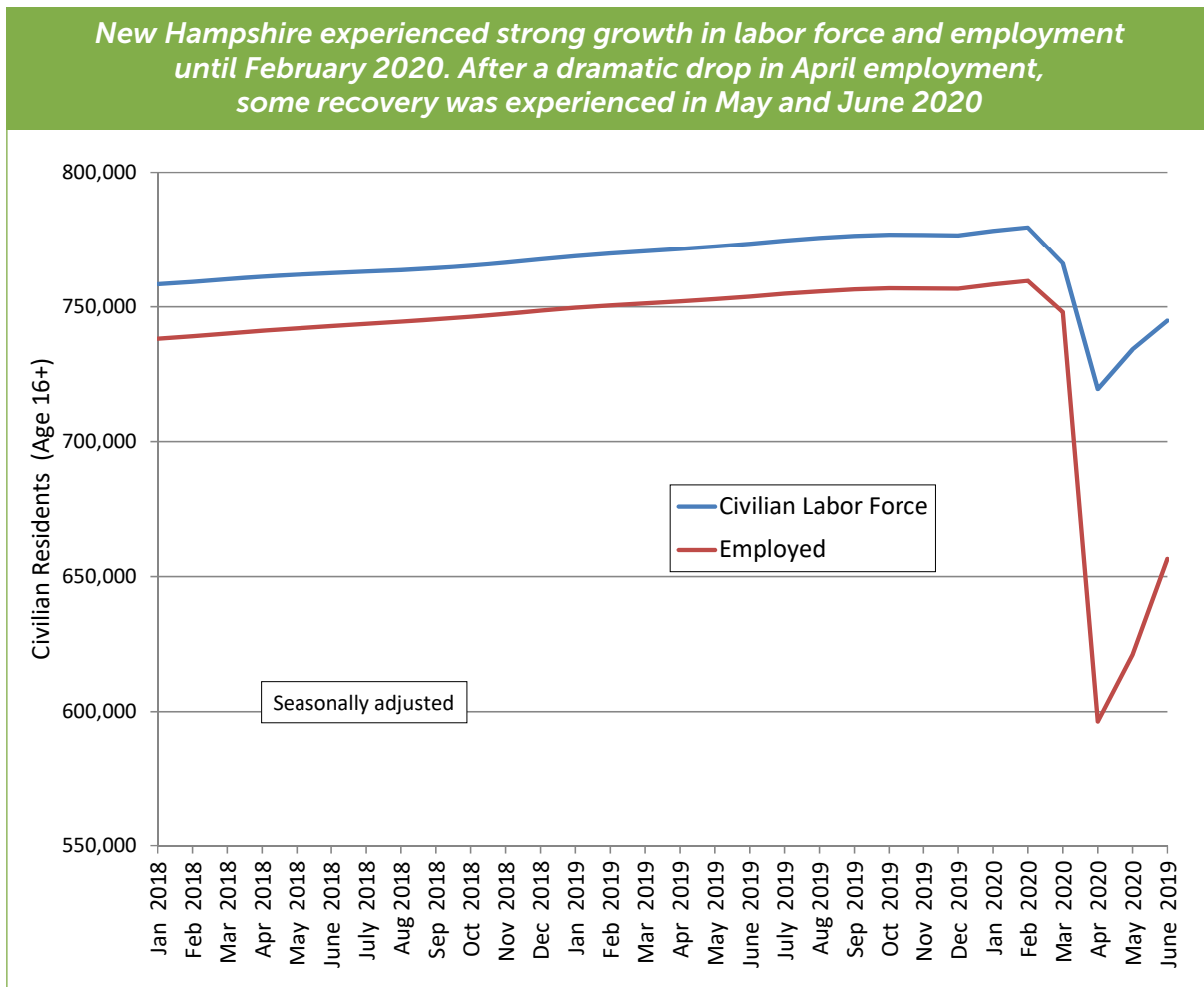
\*NAICS - North American Industrial Classification System

# The Impact of the Pandemic on New Hampshire's Labor Market

## Unemployment Rate

The initial closure of schools and food and drinking services establishments in New Hampshire occurred in mid-March. The Census Bureau's Current Population Survey, the main household monthly survey behind the estimates for calculating the unemployment rate, measures the status of employment for the week including the 12th of the month, therefore the impact on the unemployment rate for March 2020 was minimal. Still, the very abrupt closure of most nonessential businesses by the end of March, resulted in a dramatic decline in both employment and labor force in April 2020. New Hampshire's unemployment rate went from 2.4 percent in March, to 17.4 in April 2020. This quick reversal in employment came after the unemployment rate had been below 3.0 percent for the prior 51 months.

Even as retail stores were allowed to re-open and health care providers resume performing elective procedures, the unemployment rates for May and June 2020 remained elevated, despite signs of improvement in the labor market.

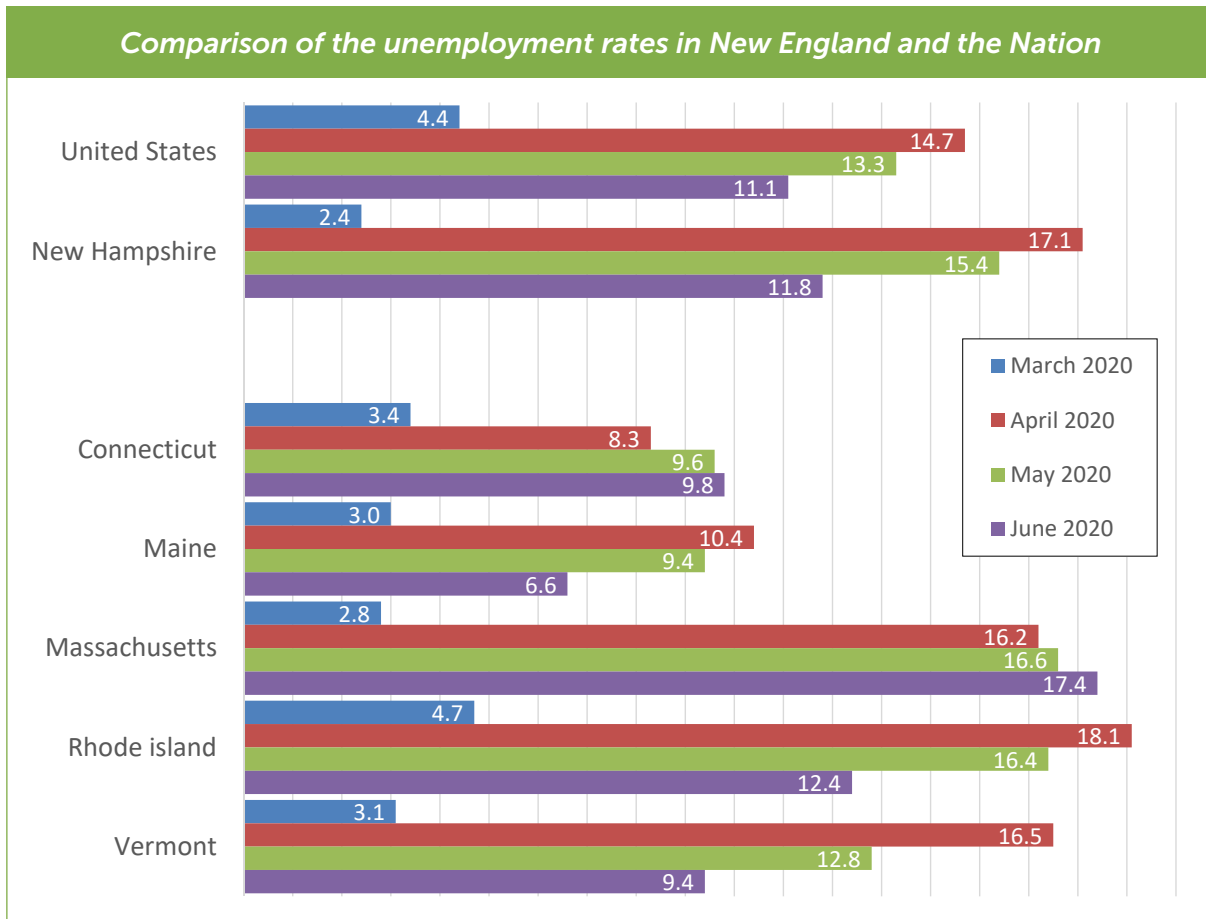


Source: Local Area Unemployment Statistics, Economic and Labor Market Information Bureau

# The Impact of the Pandemic on New Hampshire's Labor Market

Among New England states, New Hampshire's unemployment rate experienced the largest increase between March and April 2020, an indication of the state's swift response in mitigating the spread of COVID-19. In addition, prior to the passage of CARES Act at the federal level,<sup>5</sup> New Hampshire expanded eligibility for unemployment insurance.

States differed in the timing and aggressiveness of their measures to control the spread of the COVID-19 virus. The timing for expanding unemployment compensation eligibility similarly differed among states. These differences largely account for the variation in unemployment rates over time among the New England states.



Source: Local Area Unemployment Statistics, U.S. Bureau of Labor Statistics

<sup>5</sup> The Coronavirus Aid, Relief, and Economic Security Act (CARES Act) was passed by Congress and signed by the President on March 27, 2020. This federal response to the pandemic expanded states' ability to provide unemployment insurance due to the COVID-19 pandemic, including providing unemployment benefits for the self-employed.

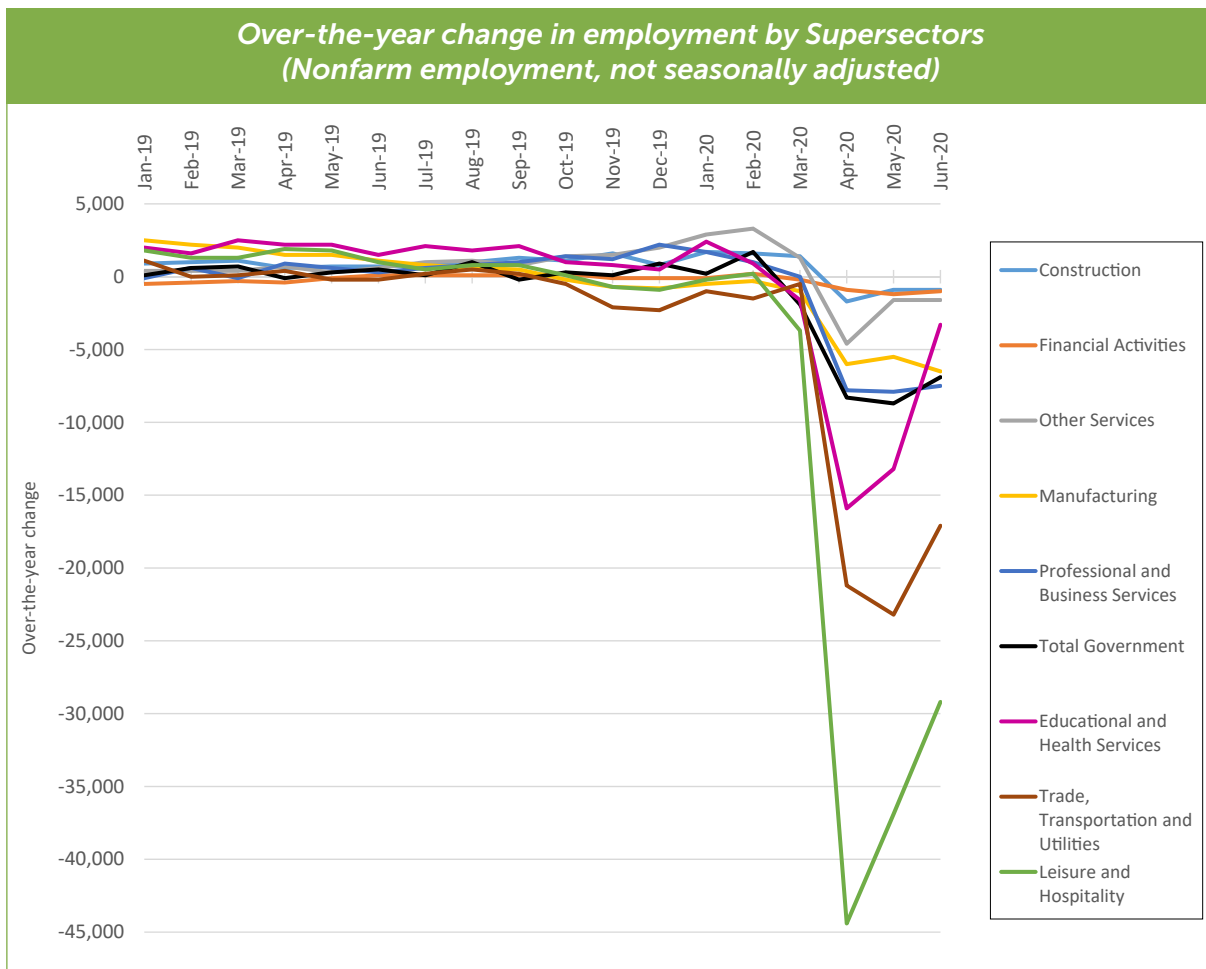


# The Impact of the Pandemic on New Hampshire's Labor Market

## Employment by Supersectors

Executive orders and other efforts to limit the spread of the COVID-19 virus had the greatest impact on the *Leisure and hospitality*<sup>6</sup>; *Trade, transportation and utilities*<sup>7</sup> and *Educational and health services*<sup>8</sup> industries. Comparing employment levels over-the-year, *Leisure and hospitality* went from 68,800 in April 2019 to 24,400 in April 2020, a drop of 44,400 jobs. Employment in *Trade, transportation and utilities* went from 137,500 in April 2019 to 116,300 in April 2020, a drop of 21,200 jobs over-the-year, and *Educational and health services* employment went from 127,900 in April 2019 to 112,000 in April 2020, a drop of 15,900 jobs.

Through June of 2020, the employment impacts of the COVID-19 pandemic have been limited in the *Construction* and *Financial services* industries, two sectors that were impacted severely during the “great recession.”



Source: Current Employment Statistics, Economic and Labor Market Information Bureau

<sup>6</sup> Supersector includes Arts, entertainment and recreation and Accommodation and food services.

<sup>7</sup> Supersector includes Wholesale Trade, Retail trade and Transportation, warehousing, and utilities

<sup>8</sup> Supersector includes Educational services and Health care and social assistance.

## The Impact of the Pandemic on New Hampshire's Labor Market

From April to May 2020, there was a shift from a full closure of all non-essential businesses to an incremental reopening of businesses but with some restrictions remaining. Employment improved in *Leisure and hospitality* and *Educational and health services* from April to May 2020. But employment in *Trade, transportation and utilities* slipped slightly lower in May 2020. Employment in these supersectors improved again in June 2020.

Rapid improvement in employment was incremental and followed the pattern of relaxed restrictions on businesses that was permitted in stages, but typically with new social distancing guidelines imposed. Re-hiring of workers occurred gradually over time but it is clear that some pandemic-induced job losses were permanent. In addition, some workers may also have chosen not to come back, in some case delaying the re-opening of businesses as new staff needed to be hired and trained.

While businesses were permitted to reopen, guidelines to protect the health of workers contributed to the business decision of whether to reopen – some have chosen not to. In addition, months of lost revenue financially weakened many businesses that were eventually forced to close permanently.

Both the national and New Hampshire economies and labor market have improved in recent months but with a vaccine unlikely to be widely available before the summer of 2021, and uncertainty about COVID-19 cases surging in the second-half of the year, the economy is likely to confront a prolonged period of elevated unemployment. A lingering negative impact on seasonal summer employment is probable, as restaurants and accommodations are just now opening up to full capacity. With most outdoor activities now allowed, the traditional seasonal economic activities have been rebounding by late summer, injecting opportunities for hiring many seasonal workers.

## Job Posting Analysis 2019 Q4 to 2020 Q2

By Marek Rivero

The fourth quarter of 2019 and the first two quarters of 2020 represent the most recent three quarters of job posting data available. These three quarters have seen dramatic changes in the nation's and New Hampshire's economic environment that have had a significant impact on job posting data for New Hampshire. Since October of 2019, the country experienced slower economic and job growth, confronted a global pandemic, and witnessed widespread racial unrest and nationwide protests.

Of these factors, the COVID-19 pandemic has had the largest impact on the nation's and New Hampshire's labor markets. Nearly every industry has experienced significant changes in response to emergency orders from state government, federal requirements, and public demand. Social distancing has become a requirement in situations where people congregate, online meetings have become common, masks are in fashion, and social norms have changed nearly overnight. These factors affected help-wanted job postings as companies struggled to adapt to the new economic landscape.

Significant changes occurred in the eight occupational groups, or job families, posting the largest number of job ads. Transportation and material moving occupations had the greatest percentage change, increasing by 89.7 percent between first and second quarter of 2020. Production occupations saw a much smaller increase of 8.5 percent. Every other job family declined in job postings. Healthcare occupations experienced a surprising (in light of a public health crisis) but explainable decrease in job postings during the pandemic.

Healthcare practitioners and technical occupations saw an increase of 417 job postings, or 14.1 percent, in the first quarter of 2020, over the 2019 fourth quarter number of 2,968. Preparations for the possibility of a pandemic was a driving force for that increase. By the second quarter of 2020, job postings in healthcare dropped by 615, or 18.2 percent, ending below 2019 fourth quarter numbers, as hospitals and outpatient healthcare facilities temporarily eliminated non-essential procedures in response to the pandemic. The New Hampshire Hospital Association (NHHA) released guidance on March 16, 2020 that suggested the cancellation of elective and non-urgent procedures for all New Hampshire hospitals. This guidance served three points: (1) to preserve personal protective equipment, or PPE; (2) to preserve inpatient hospital capacity; and (3) to promote social distancing.<sup>1</sup> This change led to a temporary reduction in staff, as the expectation for resuming elective and non-essential procedures was not until May 4, 2020. Hospitals reduced staff, by furlough or layoffs, in "staggering numbers," with Catholic Medical Center reducing hours or furloughing more than 1,300 employees. By May 4th, NHHA estimated hospital operating income losses at \$200 million for each month without the elective procedures. Even as hospitals resumed elective procedures, the numbers remained small and focused on lower risk procedures where patients would have a short recovery time.<sup>2</sup> This decrease in activity and staffing largely explains the decrease in healthcare industry job postings during the pandemic.

Many industries have experienced similar decreases in demand for their goods or services with concomitant impacts of staffing patterns. The computer and mathematics job family had 530 fewer job postings, or 28.1 percent during the quarter. Much of this decline stemmed from companies not filling positions and the loss of contract work. A surge of work for these occupations resulted from increased demand related to transitioning employees to work from home, but once these transitions were complete much of the demand for this work disappeared.<sup>3</sup> Nationwide, from the beginning of March to the end May of 2020, more than 40,000 tech jobs disappeared.<sup>4</sup> Many of these factors are temporary; as the Coronavirus plays out it is likely many of these jobs will return, assuming companies that cut staffing remain solvent.

That same optimistic view may not be true for management occupations. There were 610 fewer job ads for management positions, a 30.6 percent drop, between the first and second quarter of 2020. This is the largest percentage drop of

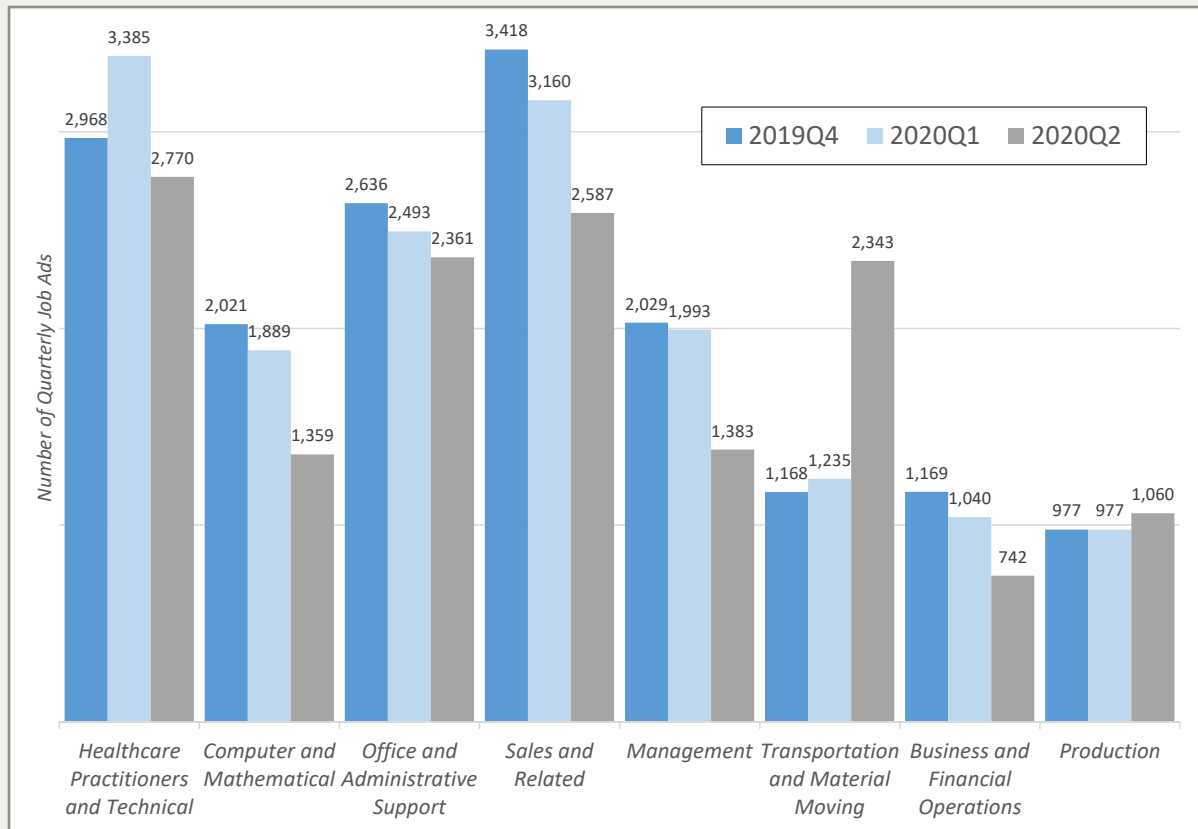
<sup>1</sup> <https://www.covidguidance.nh.gov/sites/g/files/ehbemt381/files/files/inline-documents/guidance-hospitals.pdf>

<sup>2</sup> <https://www.nhpr.org/post/new-hampshire-hospitals-resume-surgeries-elective-procedures-delayed-pandemic#stream/0>

<sup>3</sup> <https://www.computerworld.com/article/3542681/covid-related-us-it-job-losses-have-stopped-report.html>

<sup>4</sup> <https://www.bloomberg.com/graphics/2020-coronavirus-technology-layoffs/>

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any job family in this analysis. The pandemic has affected this trend in multiple ways, specifically in the increased uncertainty, changing work environment, and a decrease in demand in industries such as food services, which typically has a high volume of management positions advertised but which has been among industries most negatively affected by the pandemic. In addition, there appears to be a decrease in demand for middle management. Changes in how businesses function have forced business to take action immediately, not discuss and debate.<sup>5</sup> Middle management focused on “span-breakers” who are used to make life easier for higher level management, providing a funneling point of data and expertise. With the shift to internet-enabled communication and management tools in order to process the new requirements of employees for social distancing, much of the value in funneling information through people has diminished.<sup>6</sup> Communication tools such as Zoom and Skype have reached a new level of adoption and acceptance in the age of working remotely.

The transportation and material moving job family has had dramatic job ad growth in New Hampshire. The number of ads rose from 1,168 job postings in fourth quarter 2019 to 1,235 in first quarter of 2020, to 2,343 in second quarter 2020, an 89.7 percent increase over first quarter numbers. Again, the growth was largely in response to the pandemic. In the early days of the pandemic, consumers bought goods in greater volumes, emptying out stores across the country.<sup>7</sup> Consumers quickly began ordering online instead of shopping in person. This led to an increase in New Hampshire for jobs related to warehousing, distribution, materials handling, and stocking, jobs that require skills such as scanning and sorting, and job listings at employers like Amazon, Roehl Transport, and Doordash. Doordash is an example of the increase in demand for companies providing delivery services. Delivery of groceries, from organizations like Instacart, is another example of the increasing role of delivery services in the lives of consumers.<sup>8</sup>

<sup>5</sup> <https://www.bain.com/insights/a-new-social-contract-middle-management-post-covid-19-world-fm-blog/>

<sup>6</sup> <https://www.forbes.com/sites/georgebradt/2020/04/23/why-middle-managers-are-particularly-vulnerable-to-covid-19/#2967364608ef>

<sup>7</sup> <https://www.webmd.com/lung/news/20200618/how-covid-is-affecting-us-food-supply-chain>

<sup>8</sup> <https://www.nytimes.com/interactive/2020/05/13/technology/online-shopping-buying-sales-coronavirus.html>

# The Impact of the Pandemic on New Hampshire's Labor Market

An increase in job ads for production occupations evidences a similar trend. Initial bulk purchasing by consumers in response to the pandemic created a sharp increase in demand that required increased production to meet demand. In part, this accounts for the increase of 83 production job postings, or 8.5 percent, between first and second quarter of 2020. Demand for personal protective equipment (PPE) also rose as the pandemic swept across the country and many factories, including those in New Hampshire, shifted their production to generating PPE. One example in New Hampshire was Bauer. The maker of hockey equipment repurposed production of hockey masks to medical face shields.<sup>9</sup> The retooling of factories across the state to assist with PPE production helps explain the addition of mechanical assembler, production worker, and production tester to the most advertised job openings.

It is clear that recent public health and associated economic events have had a significant impact on the demand for labor in New Hampshire. As New Hampshire and other state economies relax restrictions and social distancing requirements, it remains to be seen how much of the shift in the demand for labor will be permanent but there is likely to be a substantial re-allocation of labor among industries and occupations as the pandemic alters consumer and business behaviors and preferences.

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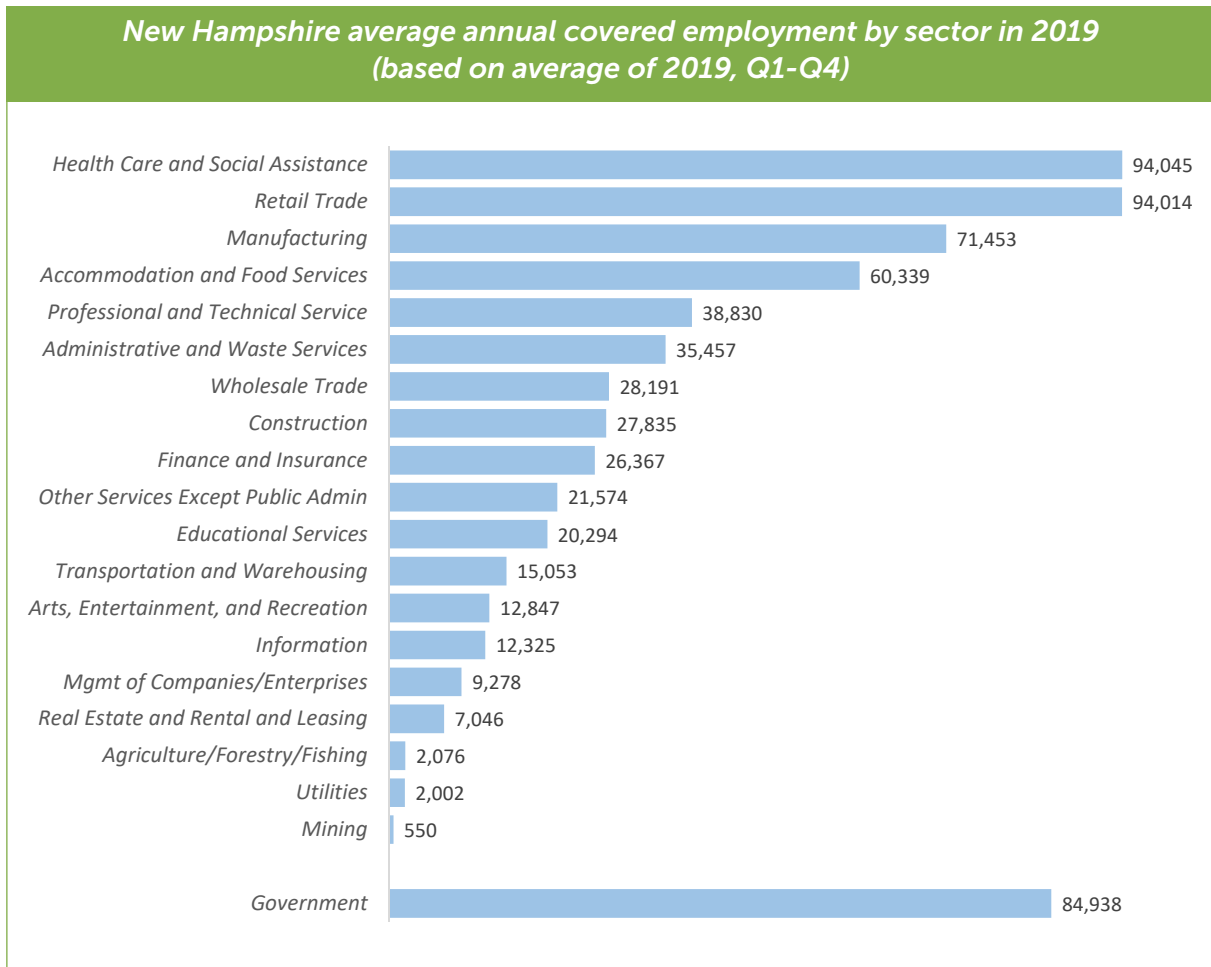
<sup>9</sup> [https://www.unionleader.com/news/health/coronavirus/granite-state-manufacturers-and-businesses-retool-to-make-protective-gear/article\\_1b897e29-0a56-5439-a442-27be73a79614.html](https://www.unionleader.com/news/health/coronavirus/granite-state-manufacturers-and-businesses-retool-to-make-protective-gear/article_1b897e29-0a56-5439-a442-27be73a79614.html)

# The Impact of the Pandemic on New Hampshire's Labor Market

## New Hampshire's labor market prior to the COVID-19 pandemic

The largest employment sector in New Hampshire in 2019 was *Health care and social assistance*, with average annual employment of approximately 94,000, followed by *Retail trade*, which has lost employment in recent years.<sup>9</sup>

With 71,500 employees, *Manufacturing* was the state's third largest employing sector in 2019. Average annual employment in manufacturing in the state in 2019 was the highest since 2008. *Accommodation and food services* is New Hampshire's fourth largest sector by employment, accounting for about 60,400 jobs.



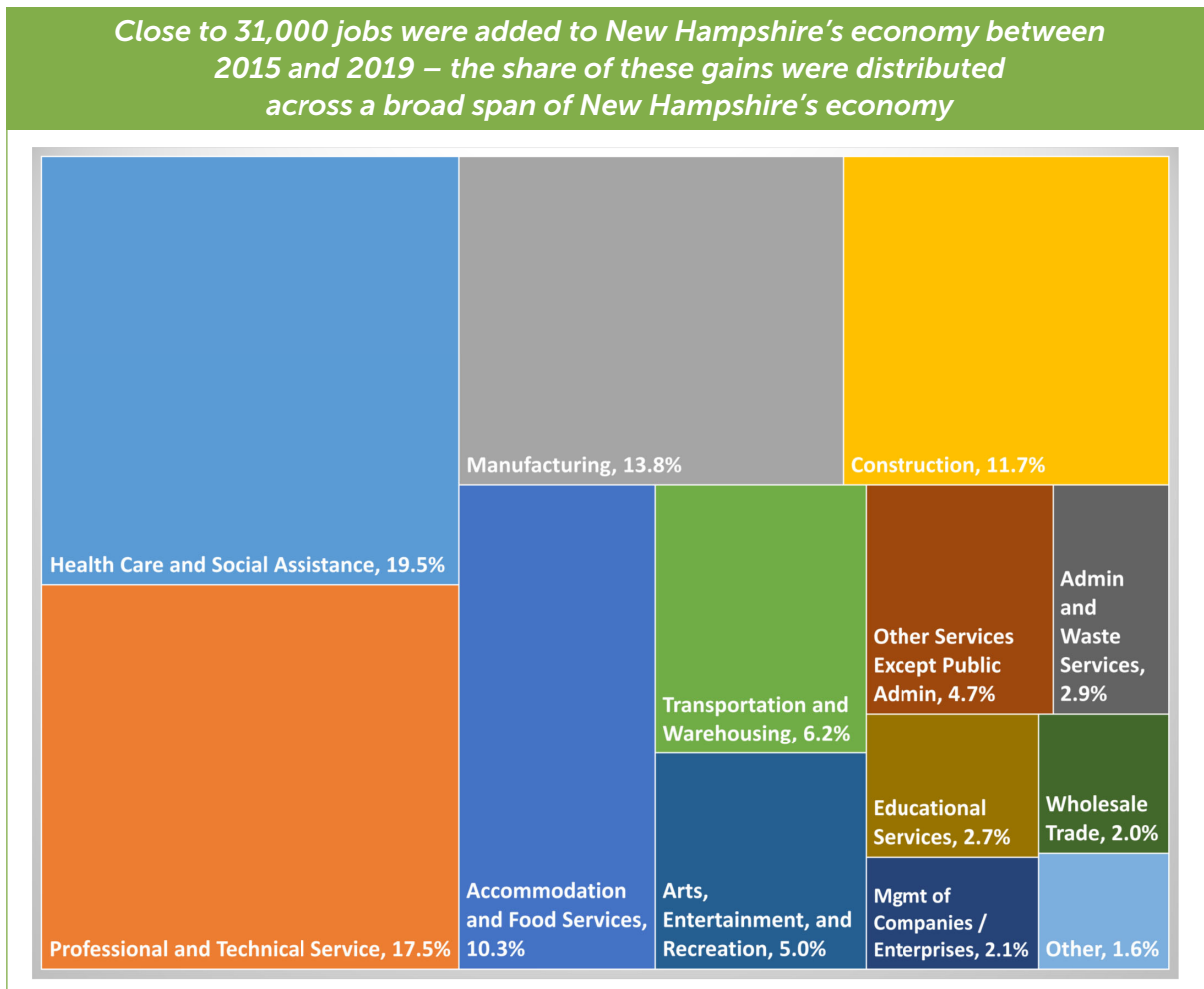
Source: Quarterly Census of Employment and Wages, Economic and Labor Market Information Bureau

<sup>9</sup> Based on the average annual covered employment (workers covered by unemployment insurance) calculated from 2019 Q1, 2019 Q2, 2019 Q3, 2019 Q4.

# The Impact of the Pandemic on New Hampshire's Labor Market

Strong growth in the hospitality and recreation industries in recent years has had differential impacts across the state and has resulted in the economies of Coös, Carroll, and Belknap counties being more dependent on visitors from outside their region. Many of the seasonal businesses in these industries earn a majority of their income on a seasonal basis and rely on favorable weather conditions (sunshine in warmer months and snow in winter months) to sustain their operations over the course of the year.

The closure of dine-in food services and non-essential businesses, as well as limiting elective surgeries and non-emergency dental care in spring of 2020 had a large direct impact on three of New Hampshire's four largest employing sectors – *Health care and social assistance*, *Retail trade*, and *Accommodation and food services*. The result was an abrupt and unprecedented level of unemployment in the state.



Source: Quarterly Census of Employment and Wages, Economic and Labor Market Information Bureau

The continuing trend (accelerated by the COVID-19 pandemic) toward more online, virtual, and cloud-based technology solutions for both business, social, and entertainment activities is driving the fast growth in *Professional and technical services*. This sector accounted for 17.5 percent of the jobs added in New Hampshire over the last five years; second only to the jobs gained in *Health care and social assistance*.

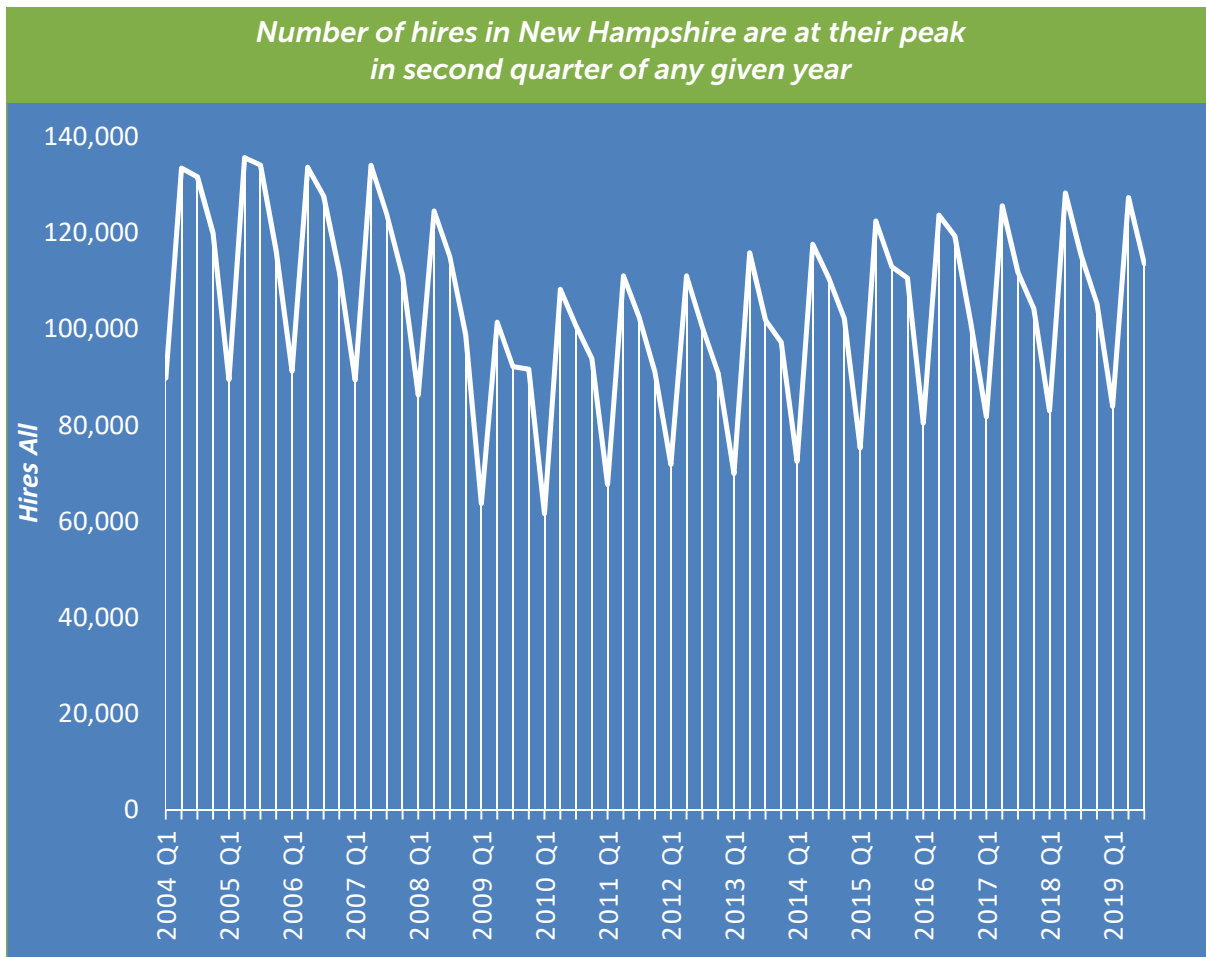
# The Impact of the Pandemic on New Hampshire's Labor Market

## Quarterly Workforce Indicators – An Analysis of Second Quarter 2019

An analysis of 2019 second quarter data from the U.S. Census Bureau's Quarterly Workforce Indicators (QWI)<sup>10</sup> provides a better understanding of the seasonal employment patterns in New Hampshire.

The QWIs provide labor market data at a more granular level. This dataset links unique employee level data to their employer. These data can identify the level of new hires in a given quarter, a specificity not available in the Current Employment Statistics (CES) or Quarterly Census of Employment and Wages (QCEW).

Hiring by businesses in New Hampshire is typically greatest during the second quarter of the year. Because of the COVID-19 pandemic, this normal pattern was not followed in the second quarter of 2020, as widespread layoffs and furloughs of employees occurred in affected industries. The QWI data are based on Quarterly Census of Employment and Wages and other administrative Census data. Data for 2020 Q2 will not be available for another six to nine months. An analysis of hiring in second quarter of 2019 sheds light on who might have been impacted the most in this current quarter.



Source: Quarterly Workforce Indicators, U.S. Census Bureau

<sup>10</sup> QWI dataset is one of the products developed under the Local Employment Dynamics (LED) – a partnership where data from federal, state and Census Bureau is combined. For more information please go to <https://lehd.ces.census.gov/>.

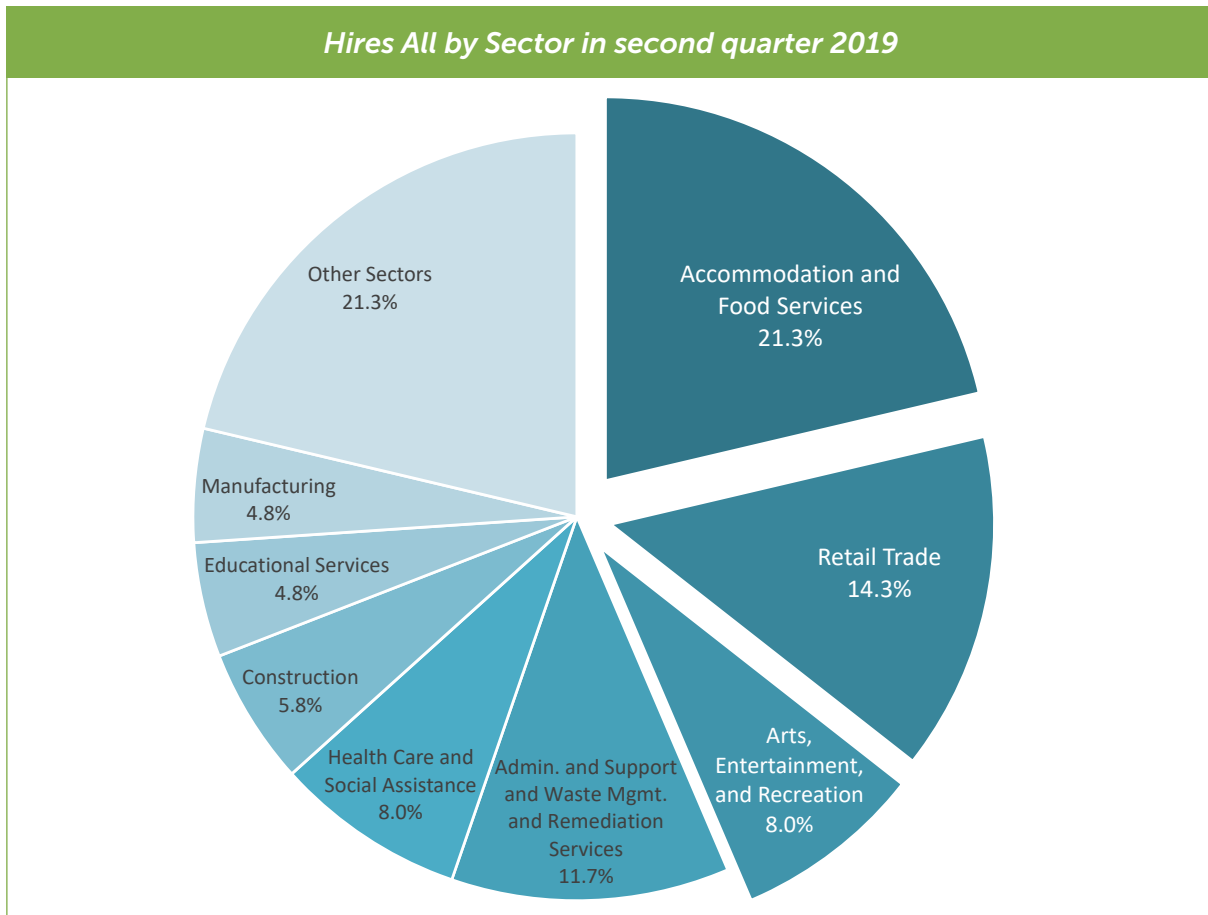


# The Impact of the Pandemic on New Hampshire's Labor Market

The number of *all hires*<sup>11</sup> in second quarter of 2019 was about 127,400, slightly below the number of all hires in second quarter of 2018. As noted, the number of *hires* is at its highest level during the second quarter in any given year in New Hampshire. On average, over the last three years, there over 44,000 more hires in the second quarter in comparison to first quarter. All hires in second quarter 2019 account for about 20 percent of total employment in that quarter. This indicates that in any normal spring season, one in five workers are newly hired. With the stay-at-home order in place during second quarter 2020, not only were many employees laid off, presumably the number of hires was well below norm.

Before the “great recession” (2007-2009), the average for hires in the second quarters was about 134,000. In second quarter 2009, hires in New Hampshire dropped to about 101,000. Though hires in all quarters have been trending upward since then, hires in New Hampshire are still well below the pre-2009 level.

Analyzing the “*hires all*” variable by sector for second quarter of 2019, large shares of hires were employed in *Accommodation and food services*, *Retail trade*, and *Arts, entertainment and recreation*. These are the same sectors most negatively affected by the state’s stay-at-home and non-essential business restrictions imposed in spring 2020. About 44 percent of all hiring in the second quarter 2019 was in one of these sectors.



Source: Quarterly Workforce Indicators, U.S. Census Bureau

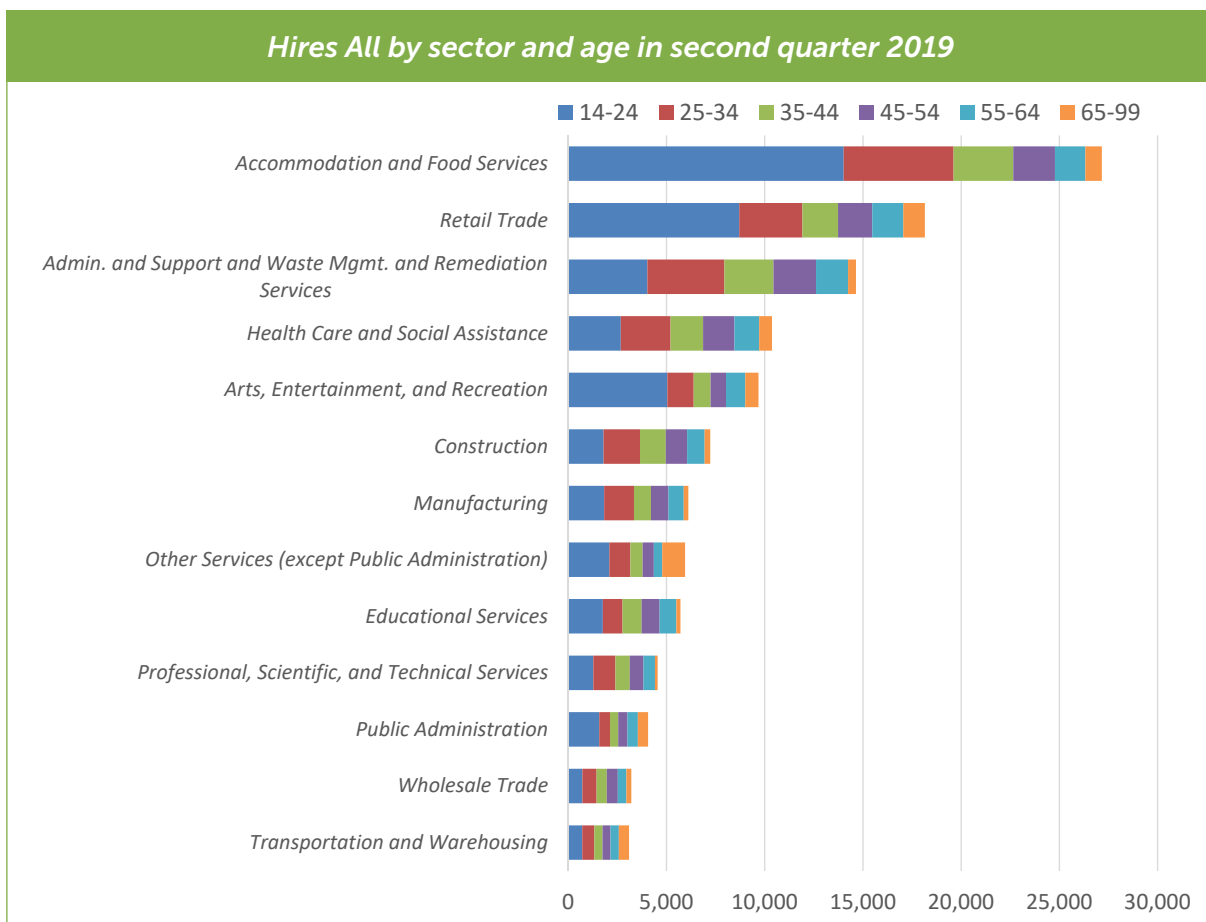
<sup>11</sup> A hire is indicated when an individual reports earnings for an employer in one quarter, but did not report earnings in the previous quarter.

# The Impact of the Pandemic on New Hampshire's Labor Market

## The Demographics of Hiring

About four in ten hires in second quarter of 2019 were under the age of 25 (about 48,600 hires in 2019 Q2 were age 14-24). This younger cohort accounted for about half of all hires in *Accommodation and food services*, *Retail trade*, and *Arts, entertainment and recreation*. There is a strong relationship between seasonal jobs in tourism and employment of younger age cohorts, in part due to their availability in the summer.

Until QWI data becomes available for the third quarter of 2020 it is unclear how the labor market impacts of the pandemic affected employment of young people in New Hampshire. Most of these younger workers were available to work in the latter part of the second quarter and early in the third quarter. In addition, an increasing number of young people may have been available for work as many did not participate in internships, study programs, athletic programs, or travel as they had planned prior to the pandemic.<sup>12</sup>



Source: Quarterly Workforce Indicators, U.S. Census Bureau

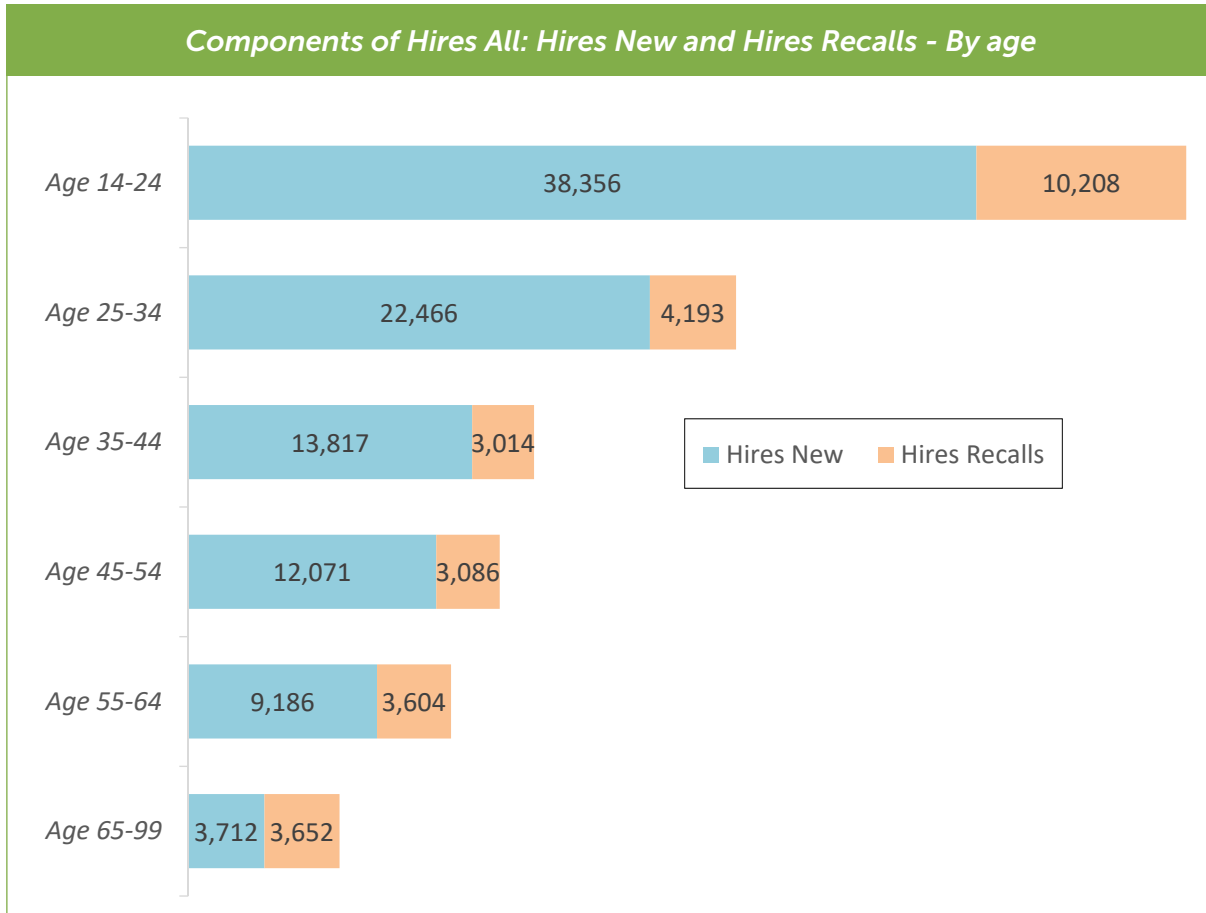
<sup>12</sup> There was a large drop in labor force participation rate among younger workers in 2020 Q2. See charts on page 22.

# The Impact of the Pandemic on New Hampshire's Labor Market

The *all hires* variable in the QWI sums *new hires* and *recall hires* data.<sup>13</sup> In the age 65-99 cohorts, about half of all hires are recall hires as opposed to the 25-34 age cohort, where only 15.7 percent of all hires are recall hires. In the current economic climate, it is possible that many of these workers might not be recalled as more businesses do not survive the pandemic. It is also possible that many of the oldest workers in New Hampshire's labor force will opt out of employment due to health and safety concerns over their vulnerability to the coronavirus disease. Older workers, especially those who usually work the same seasonal jobs, may be wary about returning to work conditions requiring close proximity to customers. Early national data appears to suggest that more older workers have exited the labor force during the pandemic.

Workers in the youngest cohort (age 14-24) are more likely to be recalled compared to the 25-34 age cohort, 21.0 percent versus 15.7 percent. Younger members of the 25-34 age cohort are likely to have completed a degree program in the spring, and applying achievements to their first career-related job instead of returning to their prior summer job.

In general, there is a large number of new hires in second quarter, as seasonal workers choose different summer jobs from year to year.



Source: Quarterly Workforce Indicators, U.S. Census Bureau

<sup>13</sup> *New hires* are those that worked for an employer in the specified quarter but were not employed by that employer in any of the previous four quarters, whereas *Recall hires* are workers who returned to the same employer for whom they had worked within the previous year.

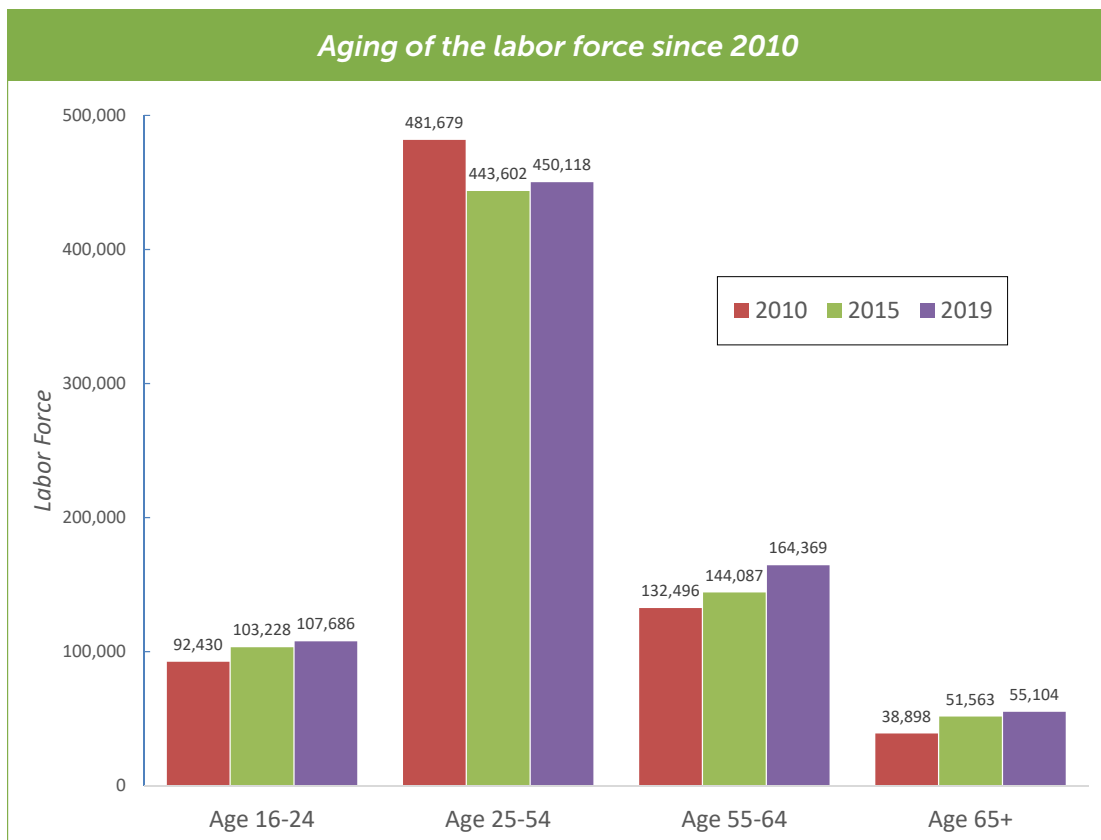
# The Impact of the Pandemic on New Hampshire's Labor Market

Demand for seasonal workers is temporary but re-occurring on an annual basis. Many of these seasonal jobs have, in prior years, been filled by foreign workers with H-2b and J-1 visas. Restrictions on movement into the United States from foreign countries and risks related to the coronavirus resulted in the federal government eliminating temporary work visas in 2020.<sup>14</sup> The local labor force itself has contracted because of health and safety concerns related to the coronavirus as well as a pandemic-related reduction in child care options for working parents.

## Who will return to work as the economy re-opens?

Prior to COVID-19, the fear that an aging workforce would produce a sharp decline in the labor force may have been overstated. While the New Hampshire labor force is aging, older workers in New Hampshire and nationally appear to be remaining in the workforce beyond traditional retirement ages. However, workers age 55 to 64 and those 65 and over are likely less willing to return to work that require physical proximity to co-workers, customers, or students. Whether the continued presence of the coronavirus will result in a temporary or more lasting reversal of this trend is uncertain and may depend on how widespread and permanent are the opportunities businesses provide for remote work. So far, there has been little indication of older workers participating at a lower rate than prior to the pandemic. During 2020 Q2, some older workers were able to work remotely, creating a high level of job flexibility. As more workplaces require workers to return to the office (including physical workplaces such as classrooms), some older workers might choose to retire.

Regardless, the immediate effect of the pandemic is to pose a threat to a rebound in New Hampshire's labor market by reducing participation by New Hampshire's older workforce. From 2015 to 2018, the number of New Hampshire residents in the labor force in age cohort 55 to 64 went from 144,087 to 164,369, a gain of more than 20,000 persons. The labor force in all other age cohorts grew from 2015 to 2019. But since 2010, the age cohort 25 to 54 declined by more than 30,000.



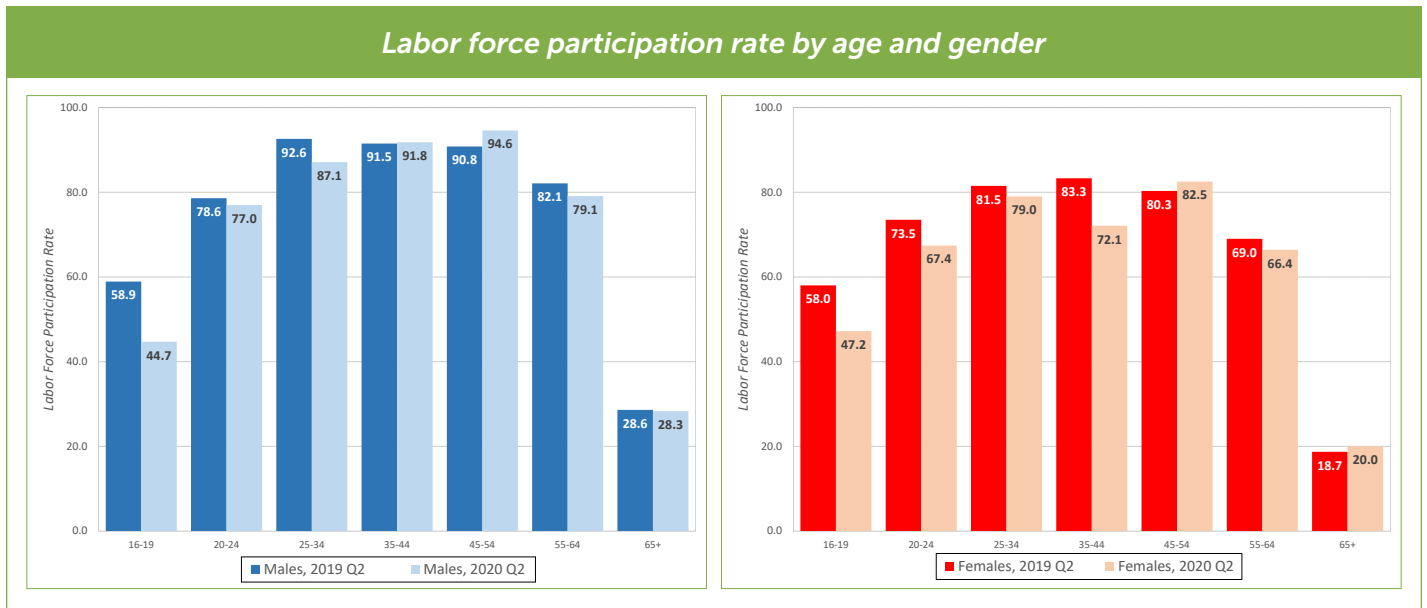
Source: U.S. Census Bureau, unpublished Current Population Survey data, 12 months average.

<sup>14</sup> Proclamation Suspending Entry of Aliens Who Present a Risk to the U.S. Labor Market Following the Coronavirus Outbreak, White House. Accessed on July 7, 2020 at <https://www.whitehouse.gov/presidential-actions/proclamation-suspending-entry-aliens-present-risk-u-s-labor-market-following-coronavirus-outbreak/>

# The Impact of the Pandemic on New Hampshire's Labor Market

It is possible that New Hampshire's labor force will eventually receive a boost as a result of the after effects of the pandemic. The Boston metro economy (as well as some other Northeastern metro areas) was among the most dynamic in the nation pre-COVID-19. The pandemic will likely damage these areas more than less densely populated areas as riding subways, dining in crowded restaurants, and attending cultural events are viewed as inherently risky well into the future. The kinds of skilled, well-educated individuals who opt to reside in those types of metro areas are more likely, in the years to come, to opt for less densely populated areas where there are good employment opportunities. Business will need to follow these workers. Places that rely more on car travel, provide more space and single family housing (like New Hampshire) will become more attractive. It is possible that more individuals and firms in the Northeast will opt to relocate in the south, southwest, and west, where there are a lot of skilled individuals in the workforce, but counties and communities within New Hampshire can also provide the space, single family housing, and well-paying jobs to attract some of the residents from more urban areas. For businesses, any region with a labor force with a high level of educational attainment and less population density should become more attractive. Limited evidence for this occurring is available to date, but as the schools started to plan for the 2020-2021 school year, some districts in New Hampshire saw large increases in the number of students enrolled.<sup>15</sup>

To get a more recent picture of how the coronavirus impacted the labor force participation rate, a comparison of 2019 Q2 to 2020 Q2 was made, based on data from Current Population Survey. Younger New Hampshire residents, especially those age 16 to 19, participated to a lesser degree in the labor force in 2020 Q2 for both males and females. Opting out of the labor force in 2020 Q2 for these younger cohorts is in line with the huge job losses in the industry sectors with high presence of younger workers. (see chart on page 18).



Source: U.S. Census Bureau, unpublished Current Population Survey data, 3 months average

<sup>15</sup> Jennifer Crompton, "Big enrollment jumps at some NH schools could be families moving from out of state," WMUR, July 20, 2020. Accessed on July 24, 2020 at <https://www.wmur.com/article/big-enrollment-jumps-at-some-nh-schools-could-be-families-moving-from-out-of-state/33372619>

## The Impact of the Pandemic on New Hampshire's Labor Market

Comparing the labor force participation rate by age and gender, the starkest contrast is in the age cohort 35 to 44. For females, the LFPR dropped from 83.3 percent in 2019 Q2, to 72.1 percent in 2020 Q2. For males, the LFPR remained practically the same between 2019 Q2 and 2020 Q2.<sup>16</sup> It is likely that some women have opted out of the labor force due to child care issues when schools shifted to remote learning and most child care facilities were closed.

As businesses return to more normal work practices, such as working full schedules and returning to the workplace, it is essential that child care options still be available.<sup>17</sup> According to Census Bureau's 2018 American Community Survey, there were 186,701 children under 18 in New Hampshire either living with both parents who are both in the labor force, or living with one parent who is in the labor force. This represented three of every four children under the age of 18. The ability for child care facilities to remain operating and for schools to reopen both safely and with economic sustainability is crucial for New Hampshire's labor market to return to pre-pandemic capacity.

<sup>16</sup> The labor force participation rate for males in the age cohort 35 to 44 was 91.5 percent in 2019 Q2 and increased slightly to 91.8 percent in 2020 Q2.

<sup>17</sup> Lisa Beilfuss, "Recovery Wild Card: The Child-Care Cliff," *Barron's*, July 20, 2020, p. 33.

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