

Vital Signs 2023

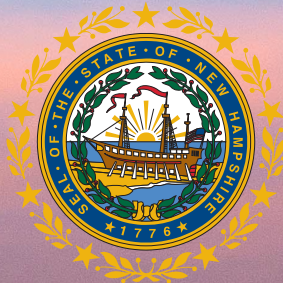
Economic & Social
Indicators for
New Hampshire

2017-2021

Vital Signs 2023

**Economic & Social
Indicators for
New Hampshire**

2017-2021



State of New Hampshire
Christopher T. Sununu, *Governor*

**New Hampshire
Employment Security**
George N. Copadis, *Commissioner*

**Economic and Labor Market
Information Bureau**
Brian J. Gottlob, *Director*

JUNE 2023

Introduction	iii
Key Economic Indicators	v
1. Population	1
2. Income & Wages.	7
3. Labor Force & Unemployment	12
4. Employment by Industry	17
5. Occupational Trends	25
6. Private Enterprise	34
7. Transportation & Traffic.	40
8. Energy	45
9. Production	50
10. Trade and Tourism	56
11. Construction & Housing	63
12. Education	69
13. Health.	75
14. Crime & Crashes	81
15. Environment & Agriculture	88
Glossary and Index.	93

This annual review of the economic and social conditions of New Hampshire highlights fifteen different indicators that describe the state's economic, social, environmental, and cultural character. Each chapter of *Vital Signs* compiles five years of available data, analyzing emerging trends at the local, regional, and national levels where appropriate.

Attention should be paid to notations within the tables that describe data details such as sample size, time intervals, or rank order. Readers are also encouraged to review the glossary and index on page 93 to become familiar with the different terminology used throughout the report.

The information presented in *Vital Signs* has been drawn from print and internet-based media reports, trade publications, academic journals, and the records of a wide variety of state and federal agencies and private organizations. Sources used in the text are identified with footnotes, and sources used in the tables are noted below each table. While all sources are believed to be reliable, no guarantee is made as to the correctness, sufficiency, or completeness of their information.

Some of the data tables are available by substate areas of New Hampshire. If you seek additional information, please contact the Economic and Labor Market Information Bureau at elmi@nhes.nh.gov or (603) 228-4124.

We are indebted to the numerous individuals who contributed special information or provided advice on evaluating reported data. The observations expressed in this report do not necessarily reflect those of New Hampshire Employment Security, and no official endorsement should be inferred.

CHANGE IN KEY ECONOMIC INDICATORS	2019-2020		2020-2021		CHAPTER
	NET CHANGE	PERCENT CHANGE	NET CHANGE	PERCENT CHANGE	
Population	18,100	1.3%	11,100	0.8%	1
Income, per capita personal (not adjusted for inflation)	\$3,795	5.9%	\$4,658	6.8%	2
Wages, average weekly (private)	\$125	10.9%	\$155	12.2%	2
Labor force	-16,700	-2.2%	-4,300	-0.6%	3
Employment	-47,700	-6.3%	20,400	2.9%	3
Unemployment	31,000	153.4%	-24,700	-48.3%	3
Nonfarm jobs - total all industries	-44,900	-6.6%	23,600	3.7%	4
Non-current loans and leases (\$ millions)	-\$0.6	-7.5%	-\$2.8	-35.5%	6
Retail sales of electricity (million KWH)	-28	-0.3%	182	1.7%	8
Gross domestic product by state (current dollars-millions)	\$1,000	1.1%	\$11,335	12.8%	9
Gross domestic product by state (chained 2012 dollars-millions)	-\$891	-1.2%	\$7,058	9.3%	9
Export sales to the world (\$ millions)	-\$371	-6.4%	\$910	16.7%	9
Accommodations Rentals (includes Motor Vehicle Rentals) (\$ millions)	-\$194	-27.3%	\$288	55.6%	10
School enrollment, public and private (includes preschool)	-7,788	-4.1%	1,933	1.0%	12
Violent crime index (Rate per 100,000 population)	-11.7	-7.4%	N/A	N/A	14
Property crime index (Rate per 100,000 population)	-117.5	-9.7%	N/A	N/A	14
Traffic crashes	-7,697	-22.9%	2,197	8.5%	14

POPULATION

According to U.S. Census Bureau, New Hampshire's population was an estimated 1,395,231 residents on July 1, 2022, a gain of more than 7,726 residents over-the-year. New Hampshire's population gain is nearly equivalent to the net population loss in Massachusetts — between 2021 and 2022 the population in the Bay State declined by -7,716 residents. The largest population gain among New England states from 2021 to 2022 was in Maine, which added 8,102 residents.

Since the onset of COVID-19 pandemic, the U.S. population has migrated from densely populated urban areas to rural settings.¹ This outbound migration from larger cities helped boost a population influx into New Hampshire. The population gains over-the-year in 2021 and 2022 in New Hampshire were stronger than annual population gains in the decade prior to the pandemic.

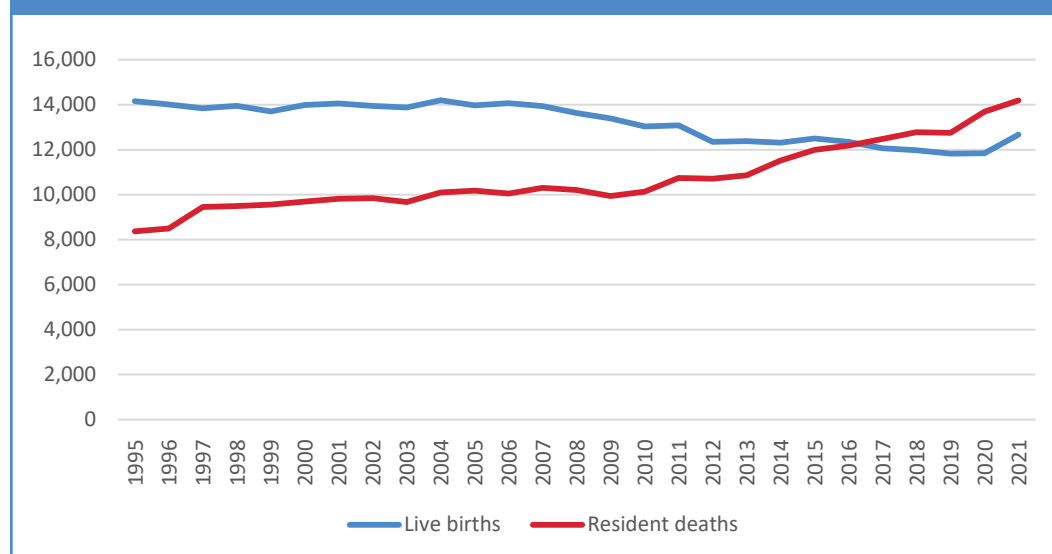
Population growth in New Hampshire from 2020 to 2021 and from 2021 to 2022 was driven by a strong increase in net migration as the natural change (births minus deaths) was negative for both years. The two components of net migration (domestic and international migration) were both positive

and summed to a little more than 10,000 over both 2020-2021 and 2021-2022. But net domestic migration slowed from about 8,500 from 2020 to 2021, dropping to 6,300 from 2021 to 2022, whereas international migration increased from 1,500 to 3,900 over the same periods. Given the demographic make-up of the state, with an older population, it is a positive sign for the economy that net migration to the state has been trending upward since 2015.

The number of residents deaths in New Hampshire has exceeded the number of live births since 2017. Combined with a low fertility rate, this is an indication of New Hampshire's aging population. Though the number of deaths continued to outnumber the number of births in New Hampshire, there was a seven percent increase in the number of births in 2021, breaking from a downward trend in the number of births in New Hampshire. According to an analysis from QuoteWizard by LendingTree, New Hampshire had the largest percentage increase in the number of births from 2020 to 2021.² The increasing number of childbirths in 2021, in New Hampshire as well as nationwide, is being referred to as a pandemic

caused baby-boom, although nationwide birth rates are still below pre-pandemic levels. Government spending during the pandemic

DEATHS IN NEW HAMPSHIRE HAVE OUTNUMBERED BIRTHS SINCE 2017



Source: New Hampshire Division of Vital Records Administration

- 1 Johnson, Kenneth M., "Recent Data Suggest Rural America Is Growing Again After a Decade of Population Loss. December 6, 2022." University of New Hampshire, Carsey School of Public Policy. Accessed on March 7, 2023 at <https://carsey.unh.edu/publication/snapshot/recent-data-suggest-rural-america-is-growing-again>.
- 2 Cousineau, Michael, "Our state may be 'old,' but..." New Hampshire Union Leader. February 1, 2023. P.1. https://www.unionleader.com/news/health/nh-leads-the-nation-in-growth-in-births/article_69d85724-2440-5d79-b7d7-755fe06a5c2d.html.

reduced poverty rates, which likely contributed to the increased birth rate in 2021.³ Fertility rates increased most for women under 25, as well as for those 25 to 44 with a college degree, who were more likely to retain their jobs during the pandemic, and more likely to be able to work from home.

New Hampshire's Longer Demographic Trend: Community by Community

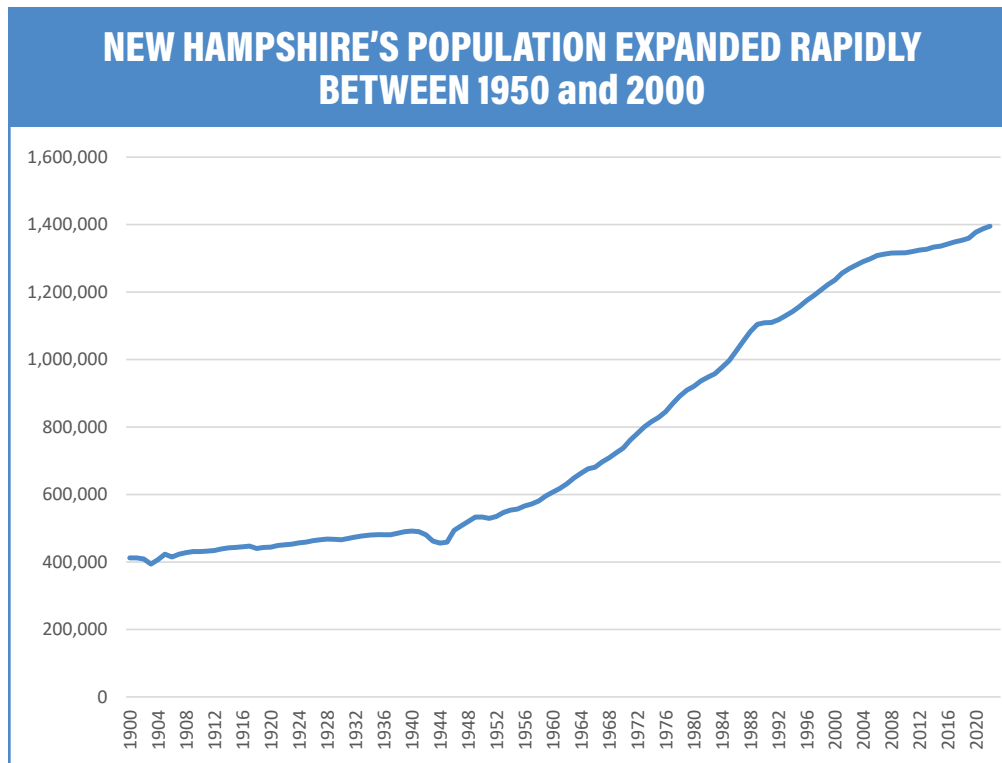
The recent post-COVID-19 uptick is muted when compared to the rapid growth occurring in New Hampshire between 1960 and 2000. This rapid population growth, especially from 1970 to 1990, led to conversion of agricultural and forested land to housing and other developments, and to the expansion of municipal budgets, creating some fear that the rural character of the state would disappear.⁴

As New Hampshire's population is expanding at a faster rate again, it might be important to take a look at how New Hampshire's population

growth since the 1950s took shape. Did this rapid expansion occur equally throughout the state and was there a difference between the rapid expansion in the state's cities versus the state's rural communities? In which geographic areas of the state did the population expansion primarily occur?

A comparison of population counts from each of the decennial Censuses between 1950 and 2020 for the state's 234 incorporated communities, show some variations in when the population expansion occurred.

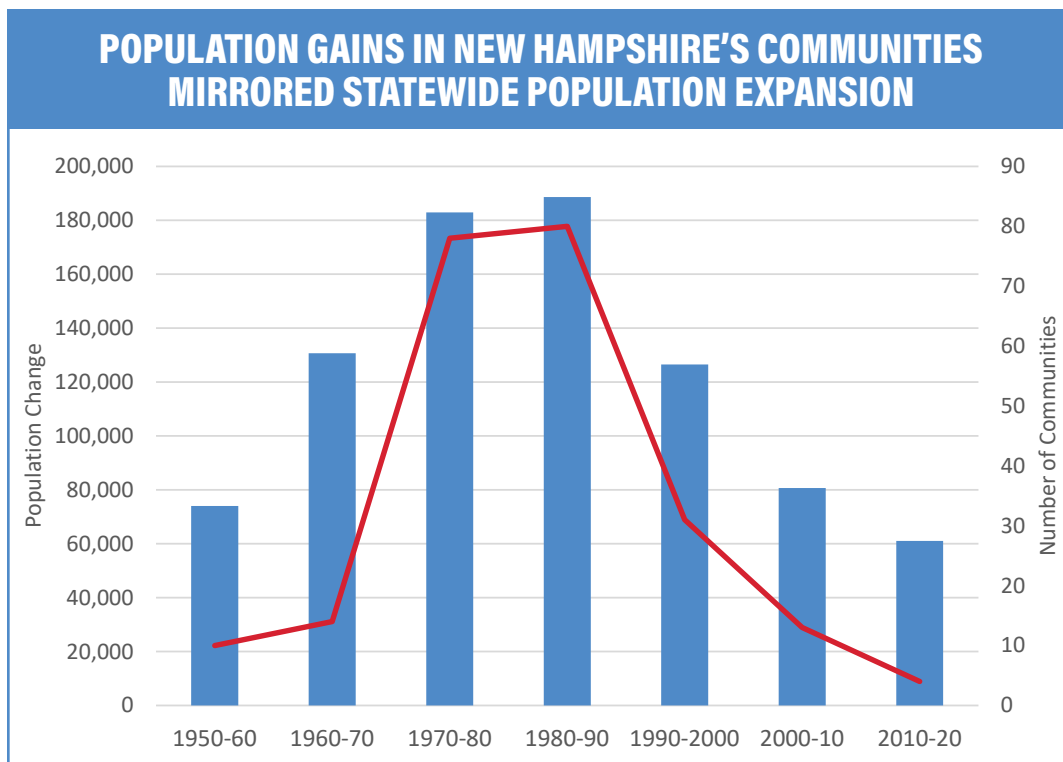
Of the 234 incorporated cities and towns in the State of New Hampshire, 78 communities experienced their largest population expansion between 1970 and 1980 and another 80 communities experienced their largest population expansion between 1980 and 1990. As the chart above illustrates, the rapid population expansion in most communities mirrored the statewide population expansion with the strongest growth during the 1970's and 1980's. For the vast



Source: U.S. Census Bureau

3 Martha J. Bailey, Janet Currie, Hannes Schwandt. "The COVID-19 Baby Bump: The Unexpected Increase in U.S. Fertility rates in Response to the Pandemic," National Bureau of Economic Research. https://www.nber.org/system/files/working_papers/w30569/w30569.pdf.

4 New Hampshire Council on Resources and Development, Smart Growth Report. July 2016. <https://www.nh.gov/osi/planning/programs/cord/documents/smart-growth.pdf>.



Source: U.S. Census Bureau

majorities of New Hampshire's communities, the rapid population growth occurred more than 20 years ago, with only four communities experiencing their largest population gains over the decade 2010-2020. The four communities with largest decennial growth from 2010 to 2020 were Laconia, Henniker, Waterville Valley and Hart's Location.

Although recent population growth has been slow compared to growth between 1960 and 2000, some residents are still wary about their community losing its rural character if more dense residential development is allowed.⁵

Over the entire 70-year period, only a few communities experienced a decline in population. The most prominent population decline has been in Berlin, with the population declining from 16,615 residents in 1950 to 9,704 in 2020. All other communities experiencing population decline between 1950 and 2020 were in the northern part of New Hampshire, and population declines in

these areas were likely a consequence of the demise of the wood-based economy (paper mills and logging) and its associated job losses.⁶

The state's largest communities, such as Manchester, Nashua and Concord have expanded, yet population growth in these larger communities have not experienced the same type of population growth that the bedroom communities along I-93 and Route 3 did over the period 1950 to 2020. Currently, many of these communities along I-93 and Route 3 continue to expand with new residential developments being built.⁷

In general, New Hampshire's cities have experienced population growth to a lesser degree than most of the smaller communities. Some of these communities changed from being a rural village to becoming a suburban community within a generation. This is likely contributing to resistance many smaller communities have towards large-scale development.

⁵ The Saint Anselm College New Hampshire Housing Poll indicated that 42 percent of respondents disagreed with the question: "New Hampshire towns and cities should relax their planning and zoning regulations in order to allow more housing to be built" and 32 percent of respondents agreed with the statement that: "New Hampshire communities should do more to prevent development and keep the state the way it is". Soren, Jason. "The New Hampshire Statewide Housing Poll and Survey Experiments: Lessons for Advocates." Pages 4-5. Saint Anselm College Center for Ethics in Business and Governance. January 1, 2021. <https://www.anselm.edu/sites/default/files/CEBG/20843-CEBG-IssueBrief-P2.pdf>.

⁶ The decline of the paper industry in New Hampshire was discussed in several papers produced by New Hampshire Employment Security. For more information, see <https://www.nhes.nh.gov/elmi/products/documents/cooscounty-groveton.pdf>.

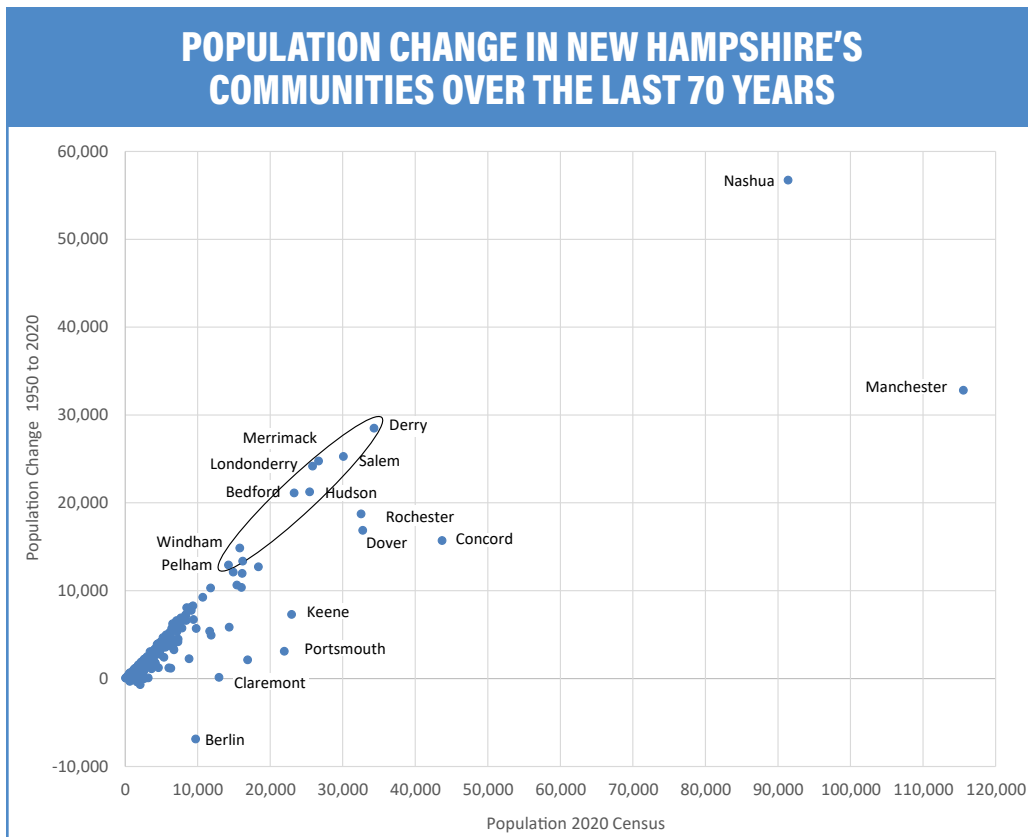
⁷ Examples of new residential and mixed-use developments are Woodmont Commons in Londonderry and Market and Main in Bedford.

The geographic location of each of New Hampshire’s communities is also an indicator of the level of population growth over the last 70 years. The communities in proximity to highways and bordering Massachusetts have grown at a much higher rate than communities in more remote locations.

New Hampshire’s future population expansion will rely on to what extent the state’s communities are willing to embrace new housing development. According to data released by New Hampshire

Department of Business and Economic Affairs, building permits increased by 11 percent in 2021, with a high concentration of the permits in a select number of larger communities. Noah Hodgetts, a principal planner at the department noted that “confining construction to cities and larger towns is insufficient ... A little bit of housing permitting activity from every community can help us get out of the [housing] crisis.”⁸

– Annette Nielsen

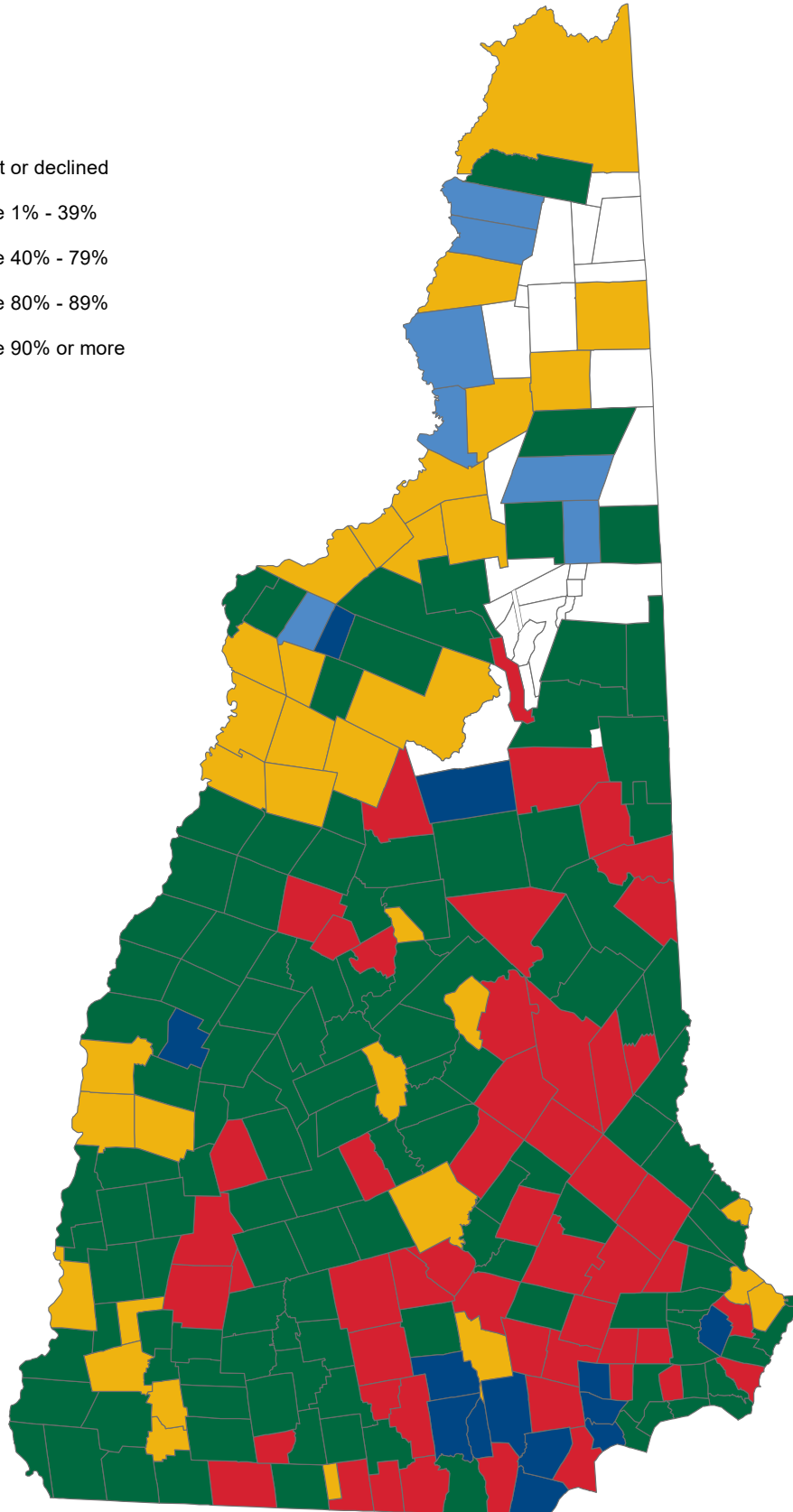


Source: U.S. Census Bureau

⁸ Gopalakrishnan, Sruthi, "Building permits rose by 11 percent in 2021, but housing crisis requires more." Concord Monitor. January 24, 2023. <https://www.nhbr.com/building-permits-rose-by-11-percent-in-2021-but-housing-crisis-requires-more/>.

Legend

- Population constant or declined
- Population increase 1% - 39%
- Population increase 40% - 79%
- Population increase 80% - 89%
- Population increase 90% or more
- Data not available



RESIDENT POPULATION	2017	2018	2019	2020	2021
Population, July 1st	1,348,787	1,353,465	1,359,711	1,377,848	1,388,992
Annual percent change	0.5%	0.3%	0.5%	1.3%	0.8%
United States rank of annual percent change (including District of Columbia)	23	23	21	18	12
Population by Gender					
Population, Males	667,781	670,773	673,793	687,214	693,132
Population, Females	681,006	682,692	685,918	690,634	695,860
Distribution by Age					
Under 5 years	4.8%	4.7%	4.7%	4.6%	4.5%
5 to 17 years	14.5%	14.3%	14.1%	14.2%	14.0%
18 to 24 years	9.5%	9.3%	9.1%	8.9%	8.9%
25 to 44 years	23.7%	23.9%	24.2%	24.5%	24.9%
45 to 64 years	30.1%	29.7%	29.2%	29.1%	28.5%
65 years and over	17.5%	18.0%	18.7%	18.8%	19.3%
Median Age					
United States	38.0	38.2	38.4	38.5	38.8
New Hampshire	42.9	43.0	43.1	43.0	43.0
Connecticut	40.9	41.0	41.1	41.0	41.1
Maine	44.8	44.9	45.0	44.8	44.7
Massachusetts	39.4	39.4	39.6	39.6	39.9
Rhode Island	40.0	40.0	40.1	40.2	40.3
Vermont	42.8	42.9	43.0	42.8	42.9

Components of Population Change (annual)					
Natural increase rate (per 1,000 population)	-0.1	-0.5	-0.4	-0.8	-2.7
Net migration rate (per 1,000 population)	5.1	4.0	4.6	4.8	10.7

Source: Population Division, U.S. Census Bureau, ELMI Analysis. Last Update 10/26/2022

Detailed population data from the 2020 Decennial Census have not been released. 2020 population estimates are from the U.S. Census Bureau's Vintage Population Estimates, and from the 2020 American Community Survey 1-Year Experimental Data

VITAL STATISTICS	2017	2018	2019	2020	2021
Marriages	9,445	9,406	9,033	8,305	9,363
Marriage rate (per 1,000 population)	7.0	6.9	6.6	6.0	6.7
Divorces	4,268	4,231	4,238	3,274	3,631
Divorce rate (per 1,000 population)	3.2	3.1	3.1	2.4	2.6
Live births	12,064	11,977	11,826	11,840	12,670
Birth rate (per 1,000 population)	8.9	8.8	8.7	8.6	9.1
Births to teenage mothers (less than 20 years old)	370	346	283	278	234
Percent of total live births	3.1%	2.9%	2.4%	2.3%	1.8%
Non-marital births (percent of live births)	33.3%	33.5%	32.0%	32.7%	31.9%
Resident deaths	12,480	12,779	12,749	13,690	14,189
Crude death rate (per 1,000 population)	9.3	9.4	9.4	9.9	10.2
Infant death rate (per 1,000 live births)	4.2	3.6	3.2	4.4	4.2

Source: Division of New Hampshire Vital Records Administration, ELMI Analysis. Last Update 1/19/2023

Prepared by: New Hampshire Employment Security, Economic and Labor Market Information Bureau

www.nhes.nh.gov/elmi | (603) 228-4124



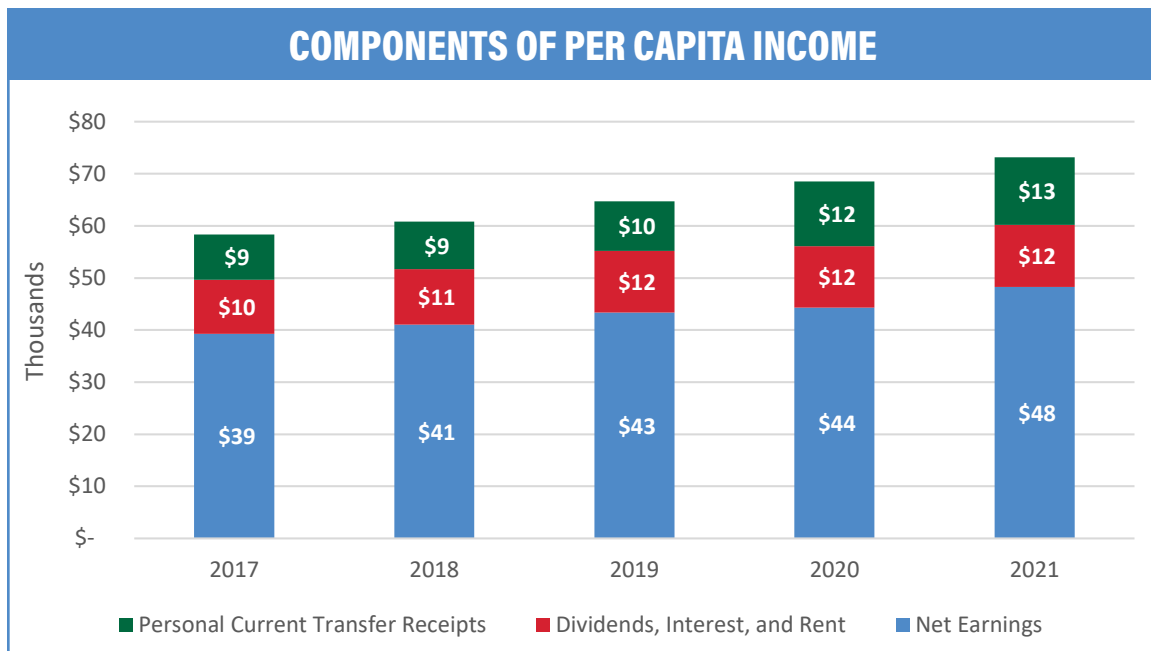
INCOME & WAGES

Prior to the pandemic, per capita personal income in New Hampshire increased steadily, from \$58,362 in 2017 to \$64,747 in 2019.¹ Personal income includes three components: earnings (wages, salaries, and benefits from an employer), income from dividends, rent and interest, and transfer payments (payments for which there are no goods or services exchanged, such as government social benefits, including Social Security payments). Earnings are the largest component, accounting for approximately two-thirds of personal income.

The coronavirus pandemic had a large effect on income for New Hampshire residents. Per capita dividends, interest and rent declined 1.4 percent in 2020, but despite the widespread unemployment experienced during the early months of the pandemic, per capita earnings increased 2.3 percent in 2020.² While this was the smallest increase since 2014, it suggests that many workers' earnings increased substantially during 2020, either through longer hours or higher hourly

wages. Transfer payments, specifically federal stimulus spending during the pandemic, were the largest factor driving income gains in 2020. Per capita transfer payments increased 31 percent (approximately \$3,000) in 2020.

Per capita personal income increased 6.8 percent in 2021, with all three components of income increasing. Per capita dividends, interest and rent increased 1.5 percent, and per capita transfer payments increased 4.4 percent, as the federal government continued pandemic-related spending. Per capita earnings were responsible for the majority of income gains, increasing 8.9 percent (almost \$4,000). New Hampshire experienced a tight labor market in 2021, with relatively few workers available to fill a relatively large number of open positions. An increase in employment in several high-paying industries, particularly professional, scientific and technical services, likely contributed to per capita income increases as well.



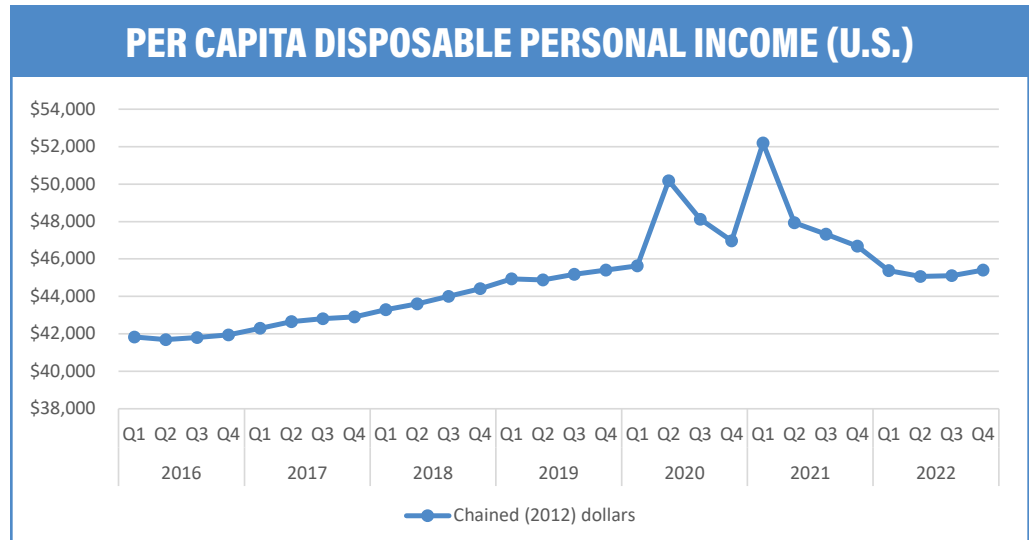
Source: U.S. Bureau of Economic Analysis, Personal Income

¹ Current dollars, not adjusted for inflation.

² Per capita earnings are an average for all New Hampshire residents, including those who earned more and those who earned less in 2020, compared to the previous year.

Inflation

High inflation in 2021 and 2022 reduced the effectiveness of income gains. As measured by the consumer price index, inflation increased 4.7 percent in 2021, followed by 8.0 percent in 2022, the highest inflation in the U.S. since the early 1980s. Real disposable income per capita, which adjusts personal income to account for inflation and taxes, indicated that U.S. incomes declined in every quarter between the second quarter of 2021 and the second quarter of 2022. Real disposable income increased over the second half of 2022, but remained below 2021 levels.



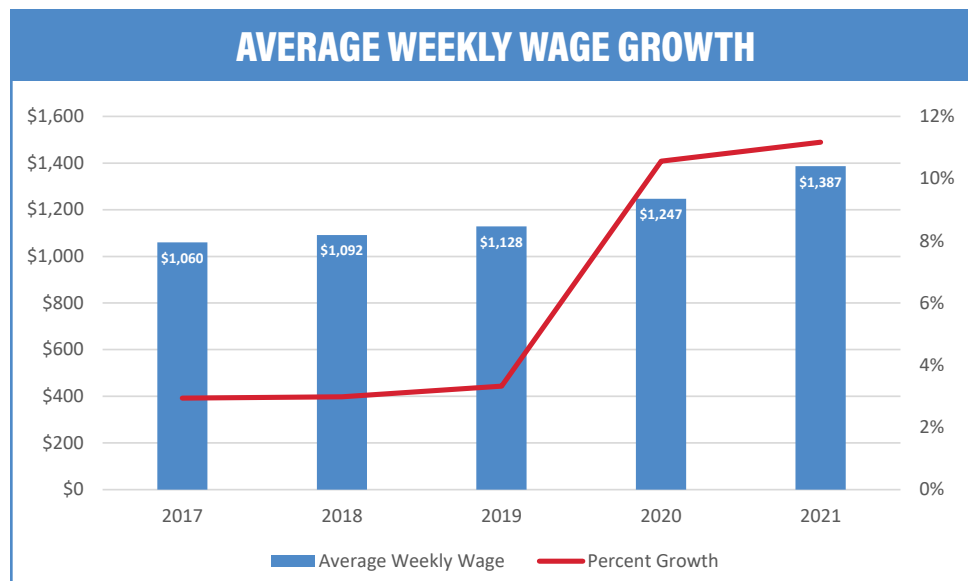
Source: U.S. Bureau of Economic Analysis, Personal Income

Wage Gains by Industry

Average weekly wage growth increased during the pandemic. After growing around three percent in 2018 and 2019, average weekly wages increased 10.6 percent in 2020, followed by an 11.2 percent

increase in 2021.³ In 2020, the pandemic-related decline in employment likely contributed to the increase in average wages. Less experienced and lower-earning workers were more likely to be laid off than more experienced workers. In addition, several industries with low average wages, including accommodation and food services and retail trade, were disproportionately affected by pandemic-related layoffs. Fewer lower-wage workers in the workforce raised the overall average wage.

The increased average wage in 2021 was more reflective of total wage growth, as high demand



Source: New Hampshire Employment Security, Quarterly Census of Employment and Wages

for workers led to higher wages. However, unusually high earnings in the management of companies and enterprises industry overstated total wage growth. Average wages in this industry tripled, from \$2,140 per week in 2020 (\$111,280 annually) to \$6,935 per week in 2021 (\$360,620 annually). Excluding management of companies and enterprises, wages increased 6.1 percent in 2021.

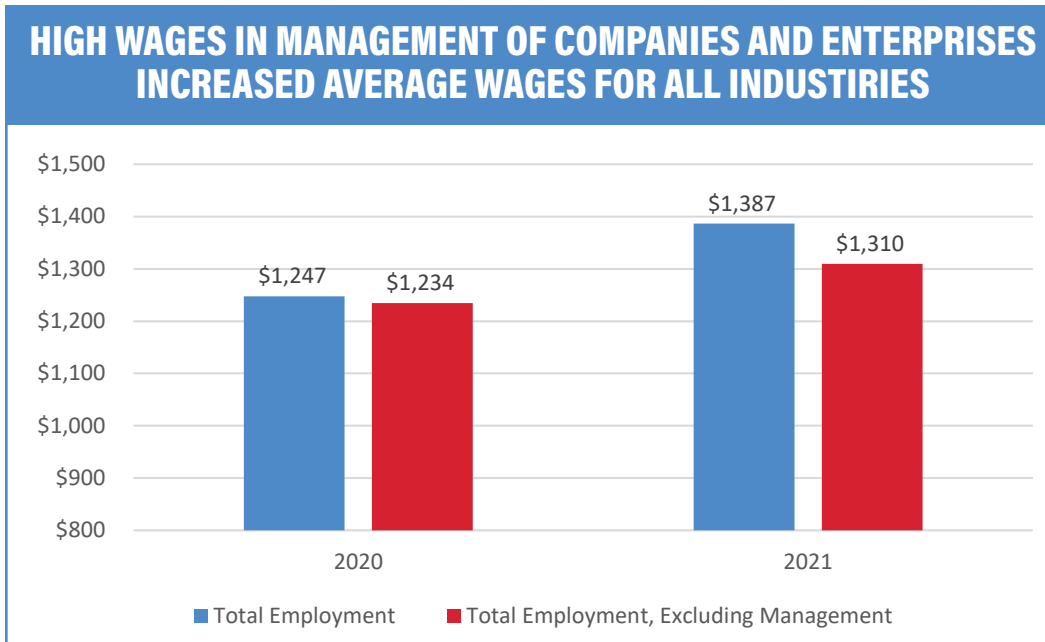
³ Average wages measure wages of employed individuals only, which is why the 2020 trend differs from per capita earnings (2.3 percent growth). Per capita earnings divide total earnings by all residents, regardless of employment status, while wages are only for employed individuals.

The average weekly wage wholesale trade increased 8.7 percent in 2020, followed by an 11.3 percent increase in 2021. Retail trade, finance and insurance, and accommodation and food services all experienced high wage growth in both 2020 and 2021 as well.

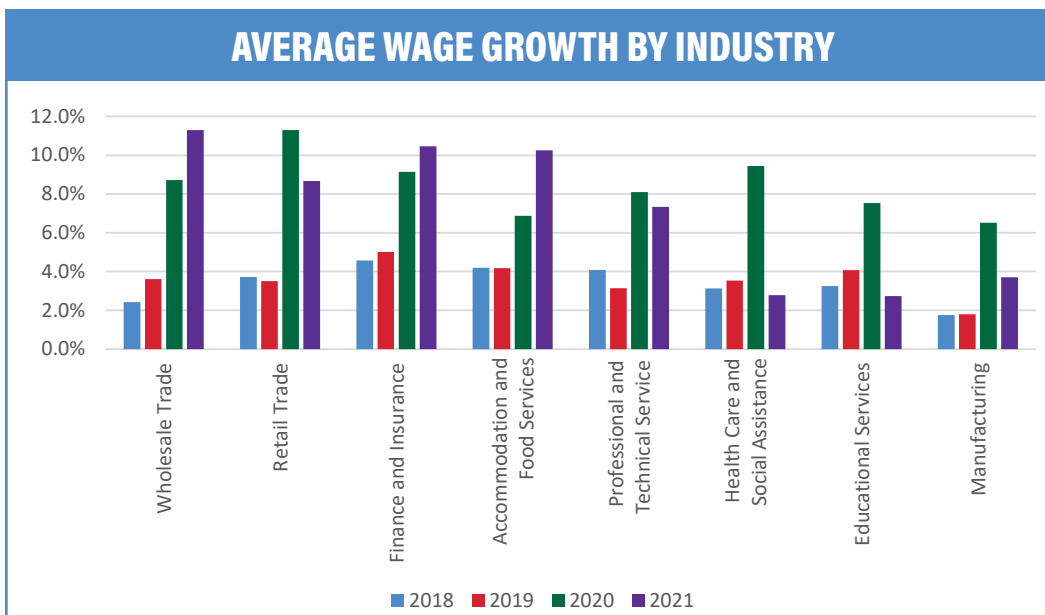
For several other industries, wage gains in 2020 were followed by smaller gains in 2021. In health

care and social assistance, average wages increased 9.4 percent in 2020, followed by a 2.8 percent increase in 2021. Educational services experienced a similar pattern, with wages increasing 7.5 percent in 2020, then increasing 2.7 percent in 2021.

– Greg David



Source: New Hampshire Employment Security, Quarterly Census of Employment and Wages



Source: New Hampshire Employment Security, Quarterly Census of Employment and Wages

TOTAL PERSONAL INCOME	2017	2018	2019	2020	2021
New Hampshire (\$ millions)	\$79,312.5	\$83,026.0	\$88,822.8	\$94,440.8	\$101,674.5
Components:					
Net Earnings ^a	67.3%	67.4%	67.0%	64.7%	65.9%
Dividends, interest, rent	17.8%	17.5%	18.3%	17.1%	16.3%
Transfer payments	14.9%	15.1%	14.7%	18.2%	17.8%
^a Earnings (wages and salaries, other income, and proprietors' income) by place of work, less personal social insurance by place of work, adjusted for place of residence.					
Per Capita Personal Income					
New Hampshire	\$58,362	\$60,831	\$64,747	\$68,542	\$73,200
United States rank (excluding D.C.)	7	6	6	6	7
Annual percent change	3.4%	4.2%	6.4%	5.9%	6.8%
Percent change after adjusting for inflation using CPI	3.7%	3.6%	5.8%	9.5%	2.0%

Per Capita Disposable Income					
New Hampshire	\$52,255	\$54,821	\$58,226	\$61,934	\$64,843
United States rank (excluding D.C.)	6	6	4	4	5
Annual percent change	3.9%	4.9%	6.2%	6.4%	4.7%
Percent change after adjusting for inflation using CPI	4.2%	4.3%	5.6%	10.0%	0.0%

Source: Bureau of Economic Analysis; ELMI Analysis. Last Update 11/16/2022

MEDIAN HOUSEHOLD INCOME (in current dollars)	2017	2018	2019	2020	2021
New Hampshire	\$75,630	\$81,346	\$86,900	\$88,894	\$88,841
Connecticut	\$74,304	\$72,812	\$87,291	\$79,432	\$80,958
Maine	\$53,316	\$58,663	\$66,546	\$63,693	\$71,139
Massachusetts	\$76,243	\$86,345	\$87,707	\$87,812	\$86,566
Rhode Island	\$65,401	\$62,266	\$70,151	\$80,175	\$74,982
Vermont	\$63,682	\$70,066	\$74,305	\$67,257	\$76,079

Source: CPS Annual Social and Economic Supplement. Last Update 11/16/2022

AVERAGE WEEKLY EARNINGS OF ALL EMPLOYEES, IN DOLLARS	2017	2018	2019	2020	2021
Earnings of Production Workers in Manufacturing	\$914.57	\$937.01	\$955.40	\$951.37	\$955.55
Average Weekly Earnings of All Employees	\$891.57	\$888.11	\$901.80	\$1,000.05	\$1,057.68

Source: US DOL, Bureau of Labor Statistics - Current Employment Statistics. Last update 11/16/2022

U.S. PRICE INDICES	2017	2018	2019	2020	2021
CONSUMER PRICE INDEX, All Urban Consumers, Year End (Not-seasonally Adjusted)					
Annual Average (U.S., 1982-1984 = 100)	245.120	251.107	255.657	258.811	270.970
Over-the-Year Change in Annual Average	2.1%	2.4%	1.8%	1.2%	4.7%
Northeast Urban Region CPI-U, Year End (Not-seasonally Adjusted)					
Annual Average (U.S., 1982-1984 = 100)	259.538	265.139	269.392	272.908	283.557
Over-the-Year Change in Annual Average	1.8%	2.2%	1.6%	1.3%	3.9%

Source: US DOL, Bureau of Labor Statistics - Consumer Price Index; ELMI Analysis. Last update 11/16/2022

WAGES	2017	2018	2019	2020	2021
TOTAL WAGES, workers covered by unemployment compensation (millions)					
Private and public employers	\$36,032	\$37,409	\$39,038	\$40,506	\$46,729
Annual percent change	3.9%	3.8%	4.4%	3.8%	15.4%
AVERAGE WEEKLY WAGE in employment covered by unemployment compensation					
All Private industries (annual average)	\$1,074	\$1,106	\$1,145	\$1,270	\$1,425
Annual percent change	3.0%	3.0%	3.5%	10.9%	12.2%
Agriculture, Forestry, Fishing, and Hunting	\$697	\$698	\$733	\$794	\$952
Mining	\$1,214	\$1,215	\$1,278	\$1,391	\$1,368
Utilities	\$2,140	\$2,245	\$2,126	\$2,360	\$2,333
Construction	\$1,183	\$1,205	\$1,248	\$1,324	\$1,368
Manufacturing	\$1,355	\$1,379	\$1,404	\$1,496	\$1,551
Wholesale Trade	\$1,762	\$1,805	\$1,870	\$2,033	\$2,263
Retail Trade	\$608	\$631	\$653	\$727	\$790
Transportation and Warehousing	\$846	\$889	\$926	\$955	\$1,008
Information	\$1,695	\$1,800	\$1,870	\$2,061	\$2,245
Finance and Insurance	\$1,943	\$2,032	\$2,134	\$2,329	\$2,573
Real Estate and Rental and Leasing	\$1,023	\$1,059	\$1,143	\$1,231	\$1,391
Professional and Technical Services	\$1,807	\$1,881	\$1,940	\$2,097	\$2,251
Management of Companies and Enterprises	\$2,103	\$1,966	\$2,046	\$2,140	\$6,935
Administrative and Waste Services	\$914	\$955	\$995	\$1,104	\$1,200
Educational Services	\$1,041	\$1,075	\$1,119	\$1,203	\$1,236
Health Care and Social Assistance	\$1,052	\$1,085	\$1,123	\$1,229	\$1,263
Arts, Entertainment, and Recreation	\$426	\$443	\$453	\$530	\$531
Accommodation and Food Services	\$401	\$418	\$435	\$465	\$513
Other Services, except Public Admin	\$705	\$729	\$755	\$829	\$875
Total Government	\$968	\$994	\$1,014	\$1,101	\$1,117
<i>Data are not adjusted for inflation.</i>					
<i>Source: New Hampshire Employment Security; Quarterly Census of Employment and Wages, ELMi Analysis. Last Update 11/16/2022</i>					
Prepared by: New Hampshire Employment Security, Economic and Labor Market Information Bureau					
www.nhes.nh.gov/elmi (603) 228-4124					

LABOR FORCE & UNEMPLOYMENT

In 2020, the first year of the coronavirus pandemic, New Hampshire’s labor force declined by 16,400 participants, a 2.1 percent decline.

While employment fell by nearly 50,000 workers (6.3 percent), the majority of these workers remained in the labor force, meaning they actively looked for work while not employed, or were on temporary layoff.

While employment increased by 18,000 workers in 2021, the labor force declined by 7,300 participants, suggesting that many out-of-work residents remained in the labor force during the early months of the pandemic, but left the labor force as the pandemic continued.

Adjusted for seasonal changes, the post-pandemic labor force peaked in September 2020, before falling through October 2021. Employment did not follow a similar trend, increasing by 15,000 workers over this time period.

Labor force increased throughout 2022; the 2022 annual average was nearly 10,000 participants higher than the 2021 average, but remained nearly 14,000 participants below 2019 levels. Employment

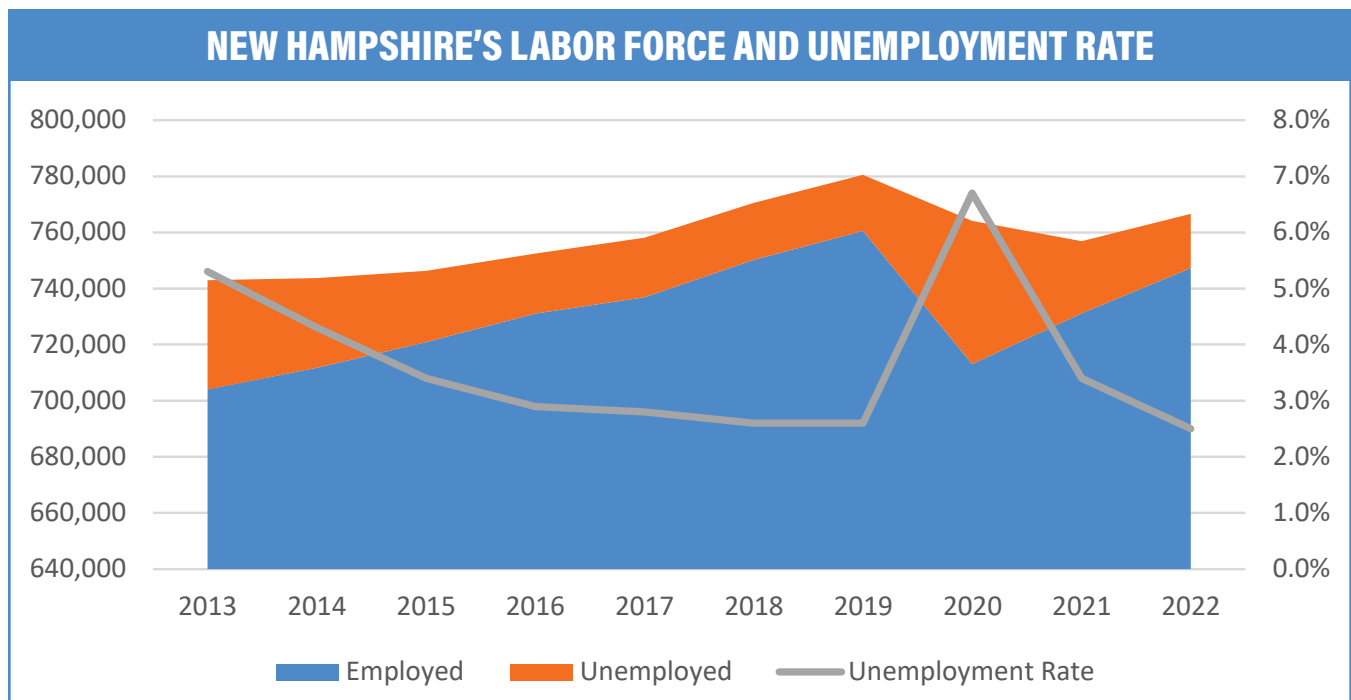
remained below pre-pandemic highs as well, by 13,200 workers.

Demographic Changes

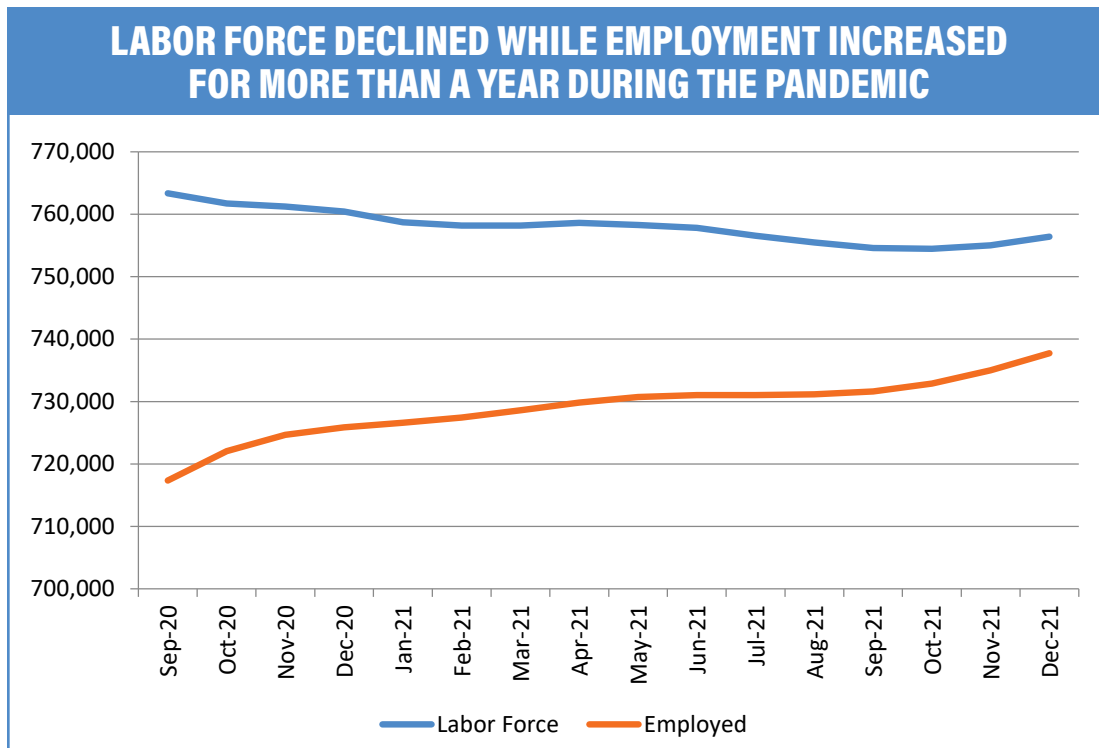
Changing demographics appear to be partially responsible for the decline in New Hampshire’s labor force. The U.S. Census Bureau’s American Community Survey estimated that between 2019 and 2021, the share of New Hampshire’s population age 65 and older increased from 18.6 percent to 19.2 percent. Residents age 65 and older are less likely to participate in the labor force than younger workers, as they have reached traditional retirement age.

Among residents age 65 and older, 28 percent of males and 19 percent of females participated in the labor force in 2019. Residents between age 55 and 64 are much more likely to participate in the labor force, with 81 percent of males and 71 percent of females in the labor force in 2019.

New Hampshire’s aging population means labor force participation is unlikely to reach pre-pandemic levels. Nearly 220,000 New Hampshire



Source: New Hampshire Employment Security, Local Area Unemployment Statistics



Source: New Hampshire Employment Security, Local Area Unemployment Statistics

residents are between ages 55 and 64, and many of these residents will leave the labor force over the next ten years.

Labor Force Participation by Age

New Hampshire's aging population was not the only reason for lower labor force participation. Compared to 2019, 2022 labor force participation rates declined for residents in most age and gender groups. Among male residents age 25 to 34, labor force participation fell more than four percentage points, from 93.1 percent in 2019 to 88.7 percent in 2022. Female residents age 25 to 34 experienced a similar decline, from 83.6 percent to 79.4 percent.

For female residents age 20 to 24, labor force participation fell from 77.0 percent in 2019 to 73.1 percent in 2022. Labor force participation for male residents age 20 to 24 fell more than eight percentage points, from 82.9 percent in 2019 to 74.8 percent in 2022. However, 2019 labor force participation for males age 20 to 24 was unusually high compared to previous years; labor force participation for this cohort was 78.2 percent in 2017 and 78.9 percent in 2018. Labor force participation for males age 20 to 24 was

4.1 percentage points lower in 2022 than in 2018, similar to labor force declines for female residents age 20 to 24, and both male and female residents age 25 to 34.

Labor force participation rates increased among workers age 16 to 19, as well as for male workers age 65 or older. Among male residents age 16 to 19, labor force participation increased from 52.6 percent in 2019 to 54.4 percent in 2022, while for female residents age 16 to 19, the labor force participation rate increased from 55.2 percent to 58.3 percent.

Among male residents age 65 or older, labor force participation increased from 27.9 percent in 2019 to 29.7 percent in 2022. The labor force participation rate was essentially unchanged for female residents age 65 or older, increasing from 19.4 percent in 2019 to 19.6 percent in 2022.

Reasons for Declining Labor Force Participation

The pandemic caused a number of challenges that led to a decline in labor force participation. Reduced availability of childcare since the beginning of the pandemic has lowered labor

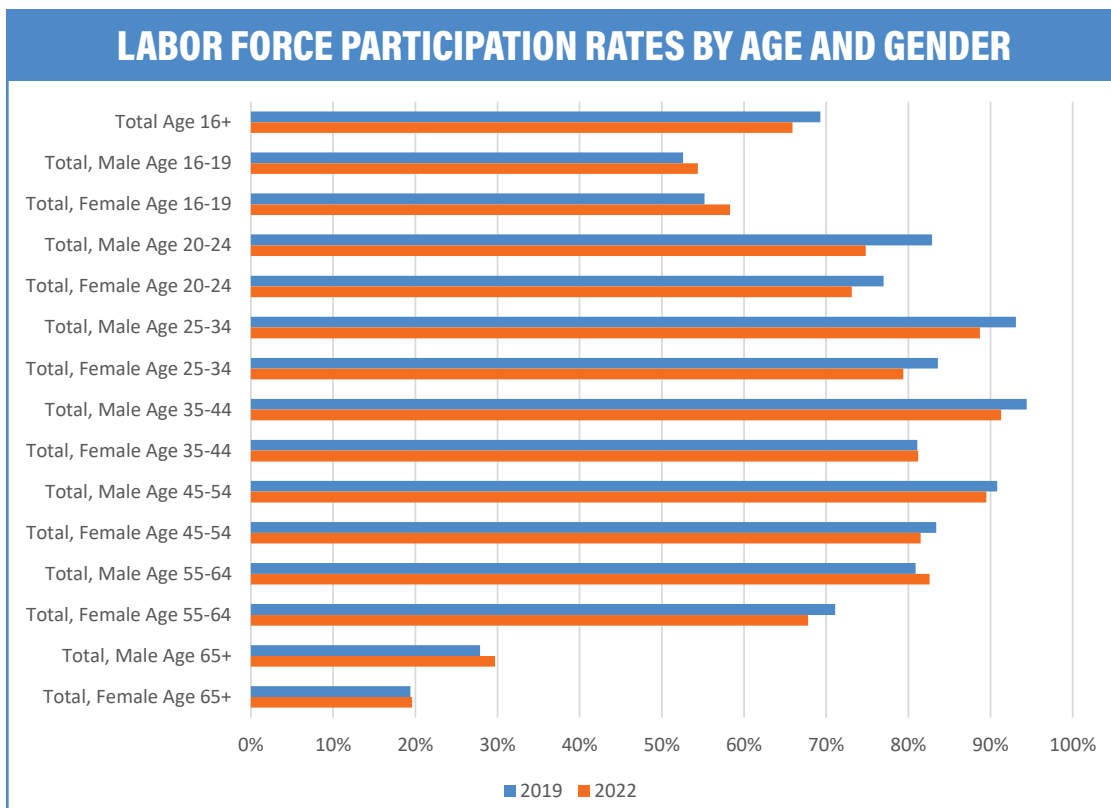
force participation, particularly among mothers.¹ Health-related challenges related to the pandemic have forced some individuals out of the labor force, including individuals dealing with “long COVID,”² and those who continue to socially distance due to health concerns related to the pandemic.³

The Federal Reserve estimated that nationwide, the retired share of the U.S. population increased by 1.5 percentage points between February 2020 and October 2022, with half of that increase considered “excess retirements,” retirements that would not have occurred without the pandemic.⁴ A study by Pew Research Center found that while most of the increase in retirement rates was due to workers

age 65 or older retiring, retirement also increased among workers age 55 to 64.⁵

The “gig economy,” has also affected labor market participation. Although independent contractors (gig workers) earn an income, they are self-employed, and are not included in the labor force. A study by consulting firm McKinsey & Company estimated that in 2022, 36 percent of American workers worked as independent contractors, either full-time or as a supplemental source of income.⁶ This was a substantial increase compared to 2016, when 27 percent of workers were independent contractors.

– Greg David



Source: U.S. Census Bureau, Current Population Survey

1 Megan Cerullo, “With Child Care Unaffordable, Many Parents Struggle to Stay Employed,” CBS News, October 21, 2021. <https://www.cbsnews.com/news/childcare-parents-labor-force/>

2 Jerome H. Powell, “Inflation and the Labor Market,” Transcript of Speech Delivered at Hutchins Center on Fiscal and Monetary Policy, Washington, DC, November 30, 2022. <https://www.federalreserve.gov/newsevents/speech/powell20221130a.htm>

3 Jose Maria Barrero, Nicholas Bloom, and Steven J. Davis, “Long Social Distancing,” National Bureau of Economic Research. <https://www.nber.org/papers/w30568>

4 Joshua Montes, Christopher Smith, and Juliana Dajon, “The Great Retirement Boom: The Pandemic-Era Surge in Retirements and Implications for Future Labor Force Participation,” Finance and Economics Discussion Series, Board of Governors of the Federal Reserve System. <https://www.federalreserve.gov/econres/feds/files/2022081pap.pdf>

5 Richard Fry, “Amid the Pandemic, a Rising Share of Older U.S. Adults are Now Retired,” Pew Research Center, November 4, 2021. <https://www.pewresearch.org/fact-tank/2021/11/04/amid-the-pandemic-a-rising-share-of-older-u-s-adults-are-now-retired/>

6 André Dua et al., “Freelance, Side Hustles, and Gigs: Many More Americans Have Become Independent Workers,” McKinsey & Company, August 23, 2022. <https://www.mckinsey.com/featured-insights/sustainable-inclusive-growth/future-of-america/freelance-side-hustles-and-gigs-many-more-americans-have-become-independent-workers>

LABOR FORCE AND UNEMPLOYMENT CIVILIAN LABOR FORCE (RESIDENTS)	2017	2018	2019	2020	2021
Civilian Labor Force (annual average)	758,133	767,629	776,471	759,770	755,422
Annual percent change	0.8%	1.3%	1.2%	-2.2%	-0.6%
Labor force participation rate	67.6%	68.7%	69.3%	66.7%	64.6%
United States rank	11	tie 6	tie 6	10	14
Male participation rate	72.1%	74.1%	74.8%	71.5%	69.4%
United States rank	tie 12	6	5	tie 10	18
Female participation rate	63.4%	63.5%	63.9%	62.1%	59.9%
United States rank	7	7	9	tie 8	tie 16
Employment (Residents)					
Employed (annual average)	736,918	747,415	756,267	708,566	728,940
Annual percent change	0.8%	1.4%	1.2%	-6.3%	2.9%
Unemployment (Residents)					
Unemployed (annual average)	21,215	21,204	20,204	51,204	26,482
Annual percent change	-1.2%	-0.1%	-4.7%	153.4%	-48.3%
Unemployment rate (annual average)					
New Hampshire	2.8%	2.6%	2.6%	6.7%	3.5%
United States rank (1=lowest)	4	tie 4	tie 4	22	9
New England	3.8%	3.5%	3.1%	8.2%	5.4%
United States	4.4%	3.9%	3.7%	8.1%	5.3%
Men					
New Hampshire	2.7%	2.6%	2.7%	6.4%	4.3%
United States	4.4%	3.9%	3.7%	7.8%	5.5%
Women					
New Hampshire	2.9%	2.6%	2.5%	6.7%	3.1%
United States	4.3%	3.8%	3.6%	8.3%	5.2%
Teens (16-19)					
New Hampshire	2.9%	2.6%	2.5%	6.7%	3.1%
United States	4.3%	3.8%	3.6%	8.3%	5.2%

Source: Bureau of Labor Statistics, Local Area Unemployment Statistics; Current Population Survey; ELMi Analysis. Last Update 3/1/2023

ALTERNATIVE MEASURES OF LABOR UNDERUTILIZATION	2017	2018	2019	2020	2021
U-1: persons unemployed 15 weeks or longer, as a percent of the civilian labor force					
New Hampshire	0.9%	0.9%	0.8%	1.8%	1.5%
United States	1.7%	1.4%	1.3%	2.8%	2.8%
U-2: job losers and persons who completed temporary jobs, as a percent of the civilian labor force					
New Hampshire	1.5%	1.2%	1.1%	4.9%	2.1%
United States	2.1%	1.8%	1.7%	6.1%	3.2%
U-3: total unemployed, as a percent of the civilian labor force (this is the definition used for the official unemployment rate)					
New Hampshire	2.8%	2.6%	2.6%	6.6%	3.7%
United States	4.4%	3.9%	3.7%	8.1%	5.3%
U-4: total unemployed plus discouraged workers, as a percent of the civilian labor force plus discouraged workers					
New Hampshire	2.9%	2.7%	2.7%	6.7%	3.8%
United States	4.6%	4.1%	3.9%	8.4%	5.6%
U-5: total unemployed, plus discouraged workers, plus all other marginally attached workers, as a percent of the civilian labor force plus all marginally attached workers					
New Hampshire	3.5%	3.0%	3.1%	7.4%	4.4%
United States	5.3%	4.8%	4.5%	9.2%	6.4%
U-6: total unemployed, plus all marginally attached workers, plus total employed part time for economic reasons, as a percent of the civilian labor force plus all marginally attached workers					
New Hampshire	6.2%	5.6%	5.2%	10.3%	6.1%
United States	8.5%	7.7%	7.2%	13.6%	9.4%
Source: Bureau of Labor Statistics, Current Population Survey; ELMI Analysis. Last Update 3/1/2023					

UNEMPLOYMENT INSURANCE	2017	2018	2019	2020	2021
Weeks compensated for unemployment (UI)	166,663	148,512	133,805	1,419,228	306,326
Benefits paid, unemployment insurance (thousands)	\$52,698	\$47,799	\$43,252	\$349,923	\$81,396
Annual percent change	-9.0%	-9.3%	-9.5%	709.0%	-76.7%
Average duration, benefit payments (weeks)	12.6	12.5	12.1	10.6	16.8
United States average	15.4	15.4	14.8	15.3	17.8
United States rank ^a (1=longest duration)	41	41	42	45	25
Average weekly benefit amount					
New Hampshire	\$316.19	\$321.85	\$323.25	\$246.56	\$265.72
United States	\$341.39	\$346.59	\$359.27	\$304.64	\$325.89
^a Ranks include D.C., Virgin Islands, and Puerto Rico					
Source: U.S. Department of Labor, Employment and Training Administration; ELMI Analysis. Last Update 3/1/2023					
Prepared by: New Hampshire Employment Security, Economic and Labor Market Information Bureau					
www.nhes.nh.gov/elmi (603) 228-4124					

EMPLOYMENT BY INDUSTRY

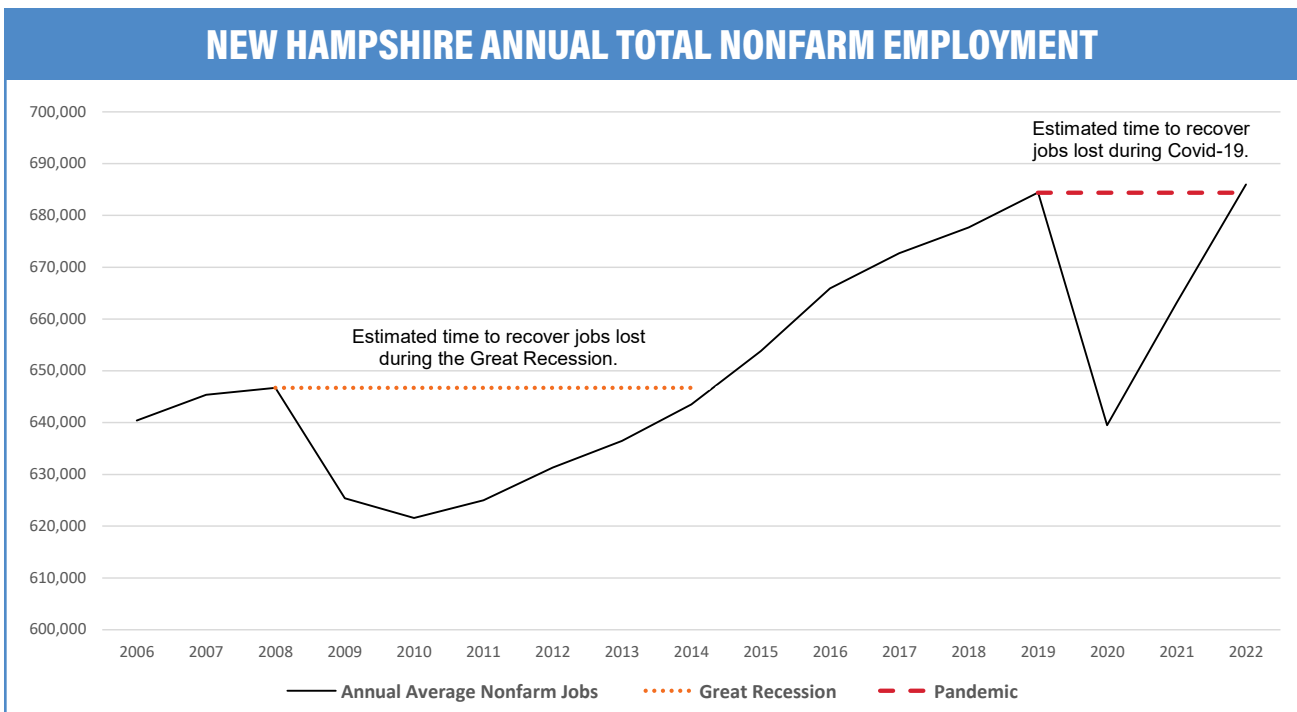
Nonfarm Jobs Numbers: Great Recession Versus Coronavirus Pandemic

In 2022, the number of New Hampshire nonfarm jobs exceeded the pre-pandemic level of nonfarm jobs. The coronavirus pandemic caused the largest disruption of New Hampshire’s economy since the great recession (2008 – 2009). In a three-month period (February – April 2020) over 100,000 nonfarm jobs were lost. On an annual basis, there were nearly 45,000 fewer nonfarm jobs in 2020 than in 2019. During the great recession, total nonfarm jobs declined by just over 30,000 jobs in New Hampshire. Although fewer jobs were lost during the great recession, the total time-to-recover from these job losses was much longer. The employment recovery from the great recession was slowed by the burst housing bubble and immense banking crisis. The federal government’s response to the pandemic recession was faster and sustained longer compared to its great recession response. Starting with the Coronavirus Aid, Relief and Economic Security Act (CARES) passed by the U.S. Congress early in the pandemic and followed by the American Rescue Plan (ARPA) passed a year later

(2021), workers received expanded unemployment compensation and stimulus checks, which likely allowed a faster recovery. The annualized number of nonfarm jobs during these two historical periods are displayed in the times series chart below.

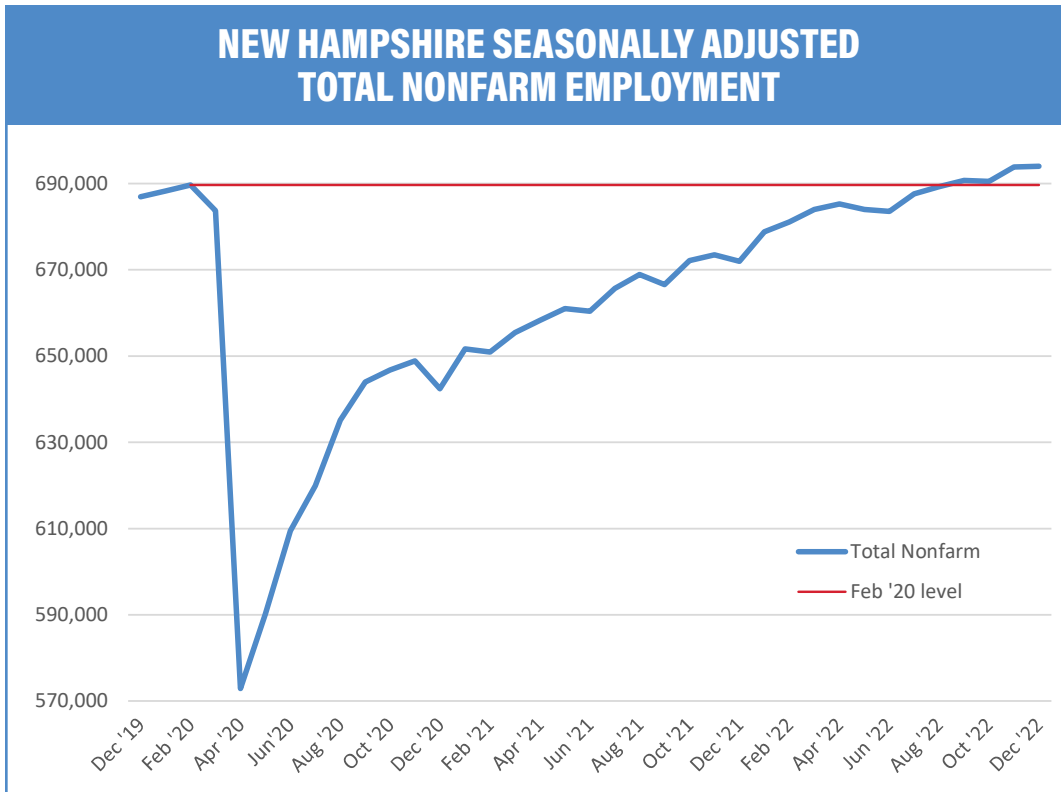
Employment Trends

By the spring of 2022, total nonfarm employment recovered from its lows of the coronavirus pandemic. Although the 2022 nonfarm annual average employment (686,000) exceeded its 2019 pre-pandemic level (684,400), some sectors continued to lag the corresponding 2019 pre-pandemic levels. Four of the largest “lagging” sectors were retail trade, private education and health services, leisure and hospitality,¹ and government. On an annual basis, these four sectors accounted for 15,000 fewer jobs in 2022 compared to 2019. In 2022, retail trade was below its pre-pandemic level by nearly 5,000 jobs. The number of government jobs declined by an estimated 4,500 jobs from its 2019 level. Private education and

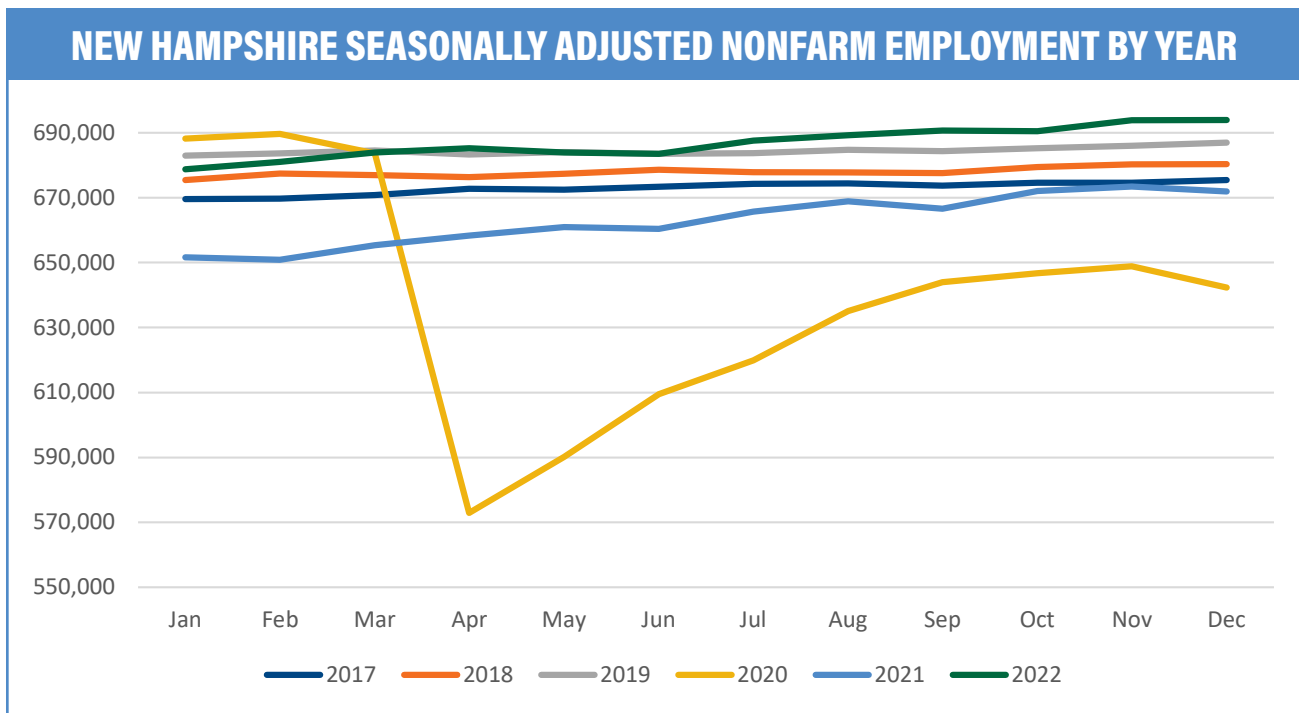


Source: New Hampshire Employment Security, Current Employment Statistics, Not Seasonally Adjusted

¹ Private education and health services and leisure and hospitality are “supersectors,” Private education and health services includes educational services and health care and social services, while leisure and hospitality contains the accommodation and food services and arts, entertainment, and recreation sectors. All of these sectors had lower employment in 2022 than in 2019.

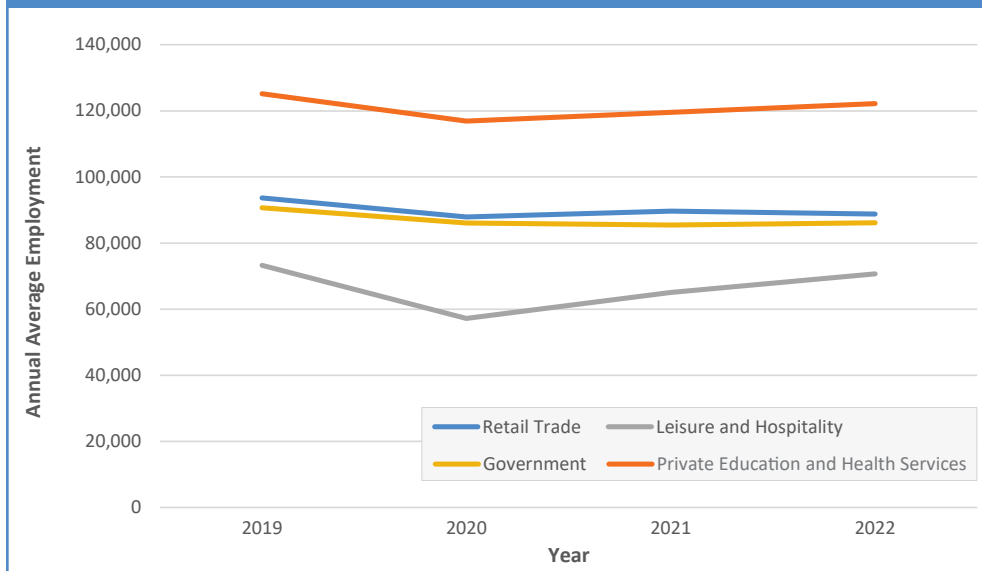


Source: New Hampshire Employment Security, Current Employment Statistics, Seasonally Adjusted



Source: New Hampshire Employment Security, Current Employment Statistics, Seasonally Adjusted

NEW HAMPSHIRE EMPLOYMENT SECTORS LAGGING 2019 LEVELS



Source: New Hampshire Employment Security, Current Employment Statistics, Seasonally Adjusted

health services and leisure and hospitality sectors declined by 3,000 and 2,600 jobs, respectively. These four sectors each contained subsectors with lower average pay and/or fewer remote work possibilities. These factors likely accounted for slower recovery rates.

From 2021 to 2022, service-providing industries gained more jobs in absolute terms than goods-producing industries. Servicing-providing employment gained 19,500 jobs year-over-year, whereas the goods producing employment gained 3,400 jobs. However, on a relative scale, the two employment categories both increased 3.5 percent year-over-year.

Comparison to National Employment

During 2020, total nonfarm employment in New Hampshire declined at a rate that outpaced the percentage drop in the U.S. total nonfarm employment. However, during 2021, New Hampshire's nonfarm employment rebounded at a faster pace than U.S. nonfarm

employment. In 2022, momentum shifted and U.S. nonfarm employment increased at a faster rate than the nonfarm employment in New Hampshire. Combining the two years (2021 - 2022), total nonfarm employment for the U.S. and New Hampshire increased at the same rate, 7.3 percent over their respective 2020 levels. In absolute terms, U.S. and New Hampshire's total nonfarm employment recovered from their

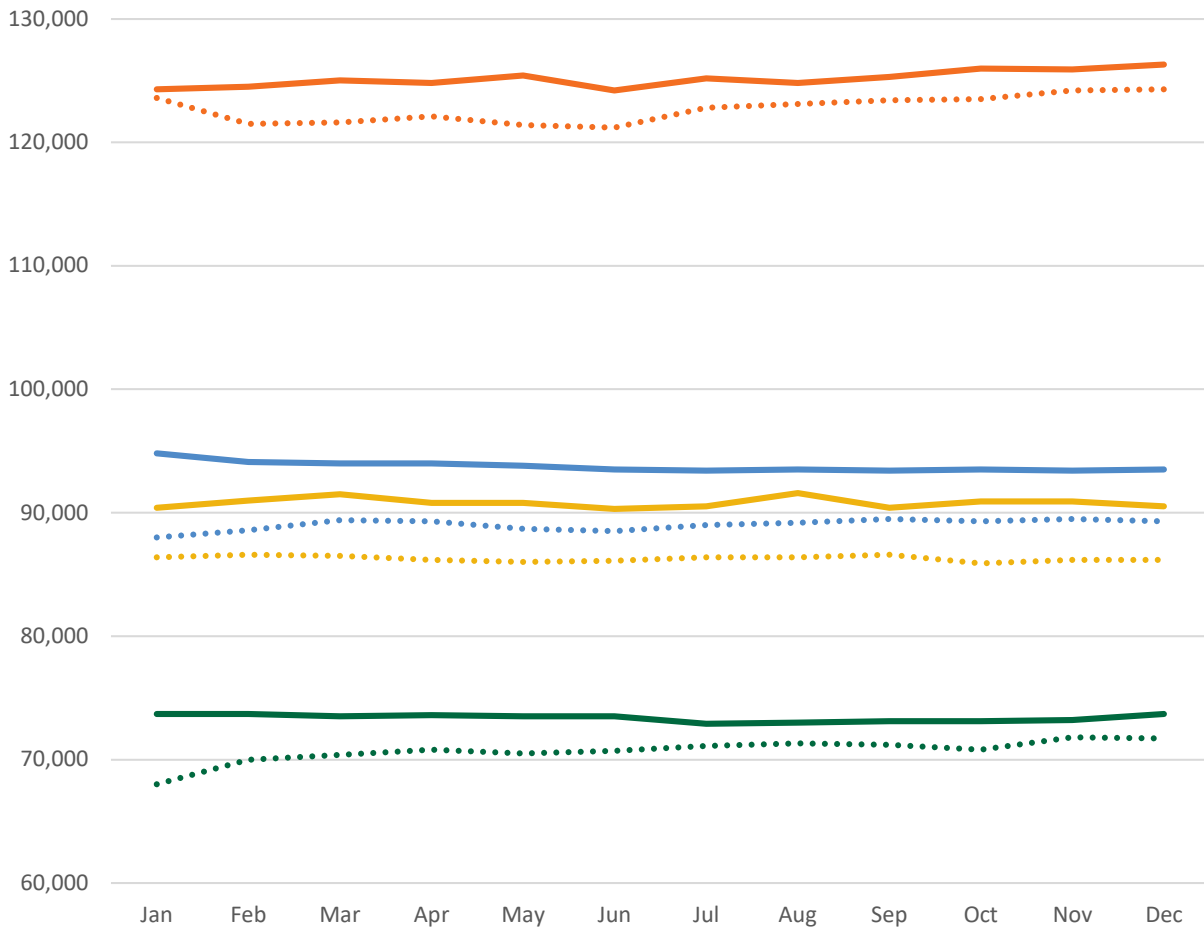
pandemic lows and exceeded their pre-pandemic 2019 levels during 2022.

Comparison to New England Employment

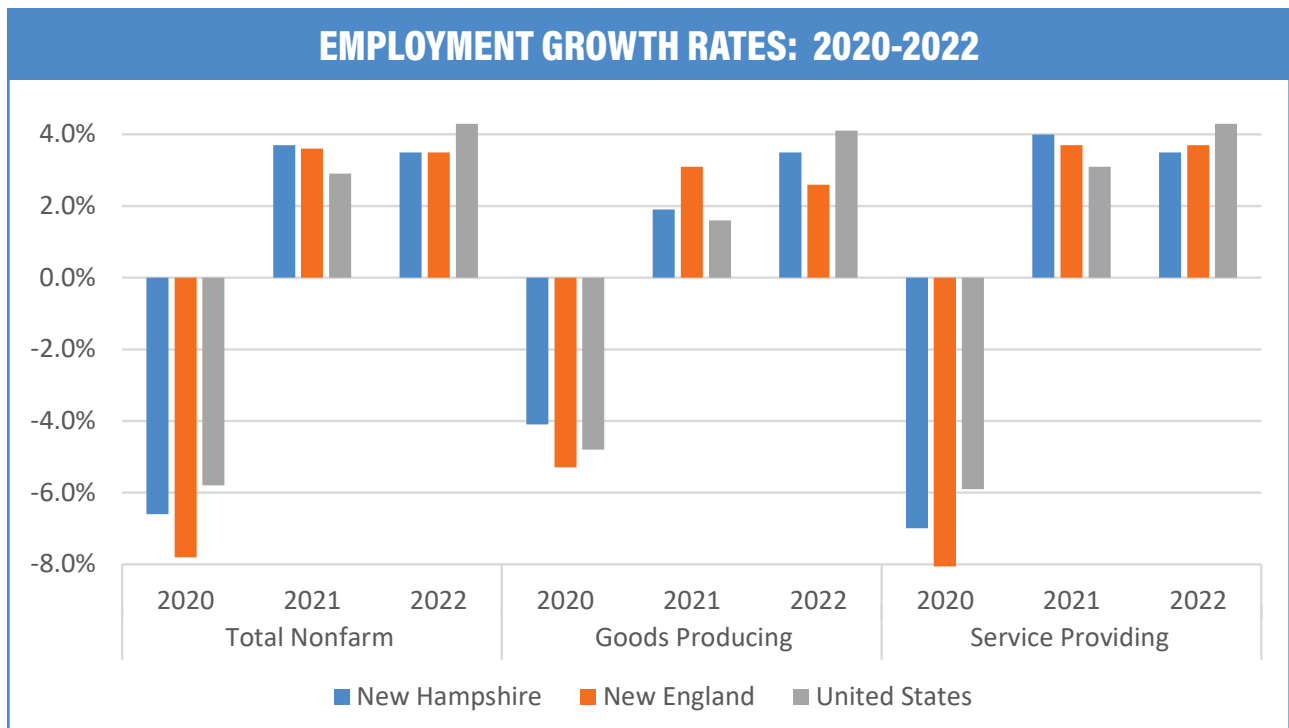
During 2020, total nonfarm employment levels in all six New England states declined at higher rates than U.S. total nonfarm employment. Of the six New England states, only Maine's total nonfarm employment level declined at a smaller rate than New Hampshire. Vermont's total nonfarm employment level dropped 9.3 percent, the most in New England during 2020. In both 2021 and 2022, total nonfarm employment levels increased in all six New England states. Despite these increases, New England's 2022 annual average of total nonfarm employment was still below its pre-pandemic 2019 annual average. Only Maine and New Hampshire's 2022 annual total nonfarm employment exceed their pre-pandemic 2019 annual total nonfarm employment level.

– David Mikelson

PRE- VS POST-PANDEMIC SEASONALLY ADJUSTED EMPLOYMENT LEVELS BY MONTH



Source: New Hampshire Employment Security, Current Employment Statistics, Seasonally Adjusted



Source: U.S. Bureau of Labor Statistics, Current Employment Statistics, Not Seasonally Adjusted

ANNUAL AVERAGE EMPLOYMENT	2018	2019	2020	2021	2022
Total Nonfarm	677,700	684,400	639,500	663,100	686,000
Total Private	587,400	593,600	553,300	577,600	599,800
Goods Producing	98,500	100,300	96,200	98,000	101,400
Mining & Logging	1,000	1,000	1,000	1,000	1,000
Construction	27,000	27,900	27,900	29,100	30,000
Manufacturing	70,600	71,500	67,300	68,000	70,400
Durable Goods	52,600	53,400	50,500	50,900	52,500
Computer & Electronic Product	16,000	16,500	15,800	15,500	16,000
Nondurable Goods	18,000	18,100	16,800	17,200	17,900
Service Providing	579,200	584,000	543,300	565,100	584,600
Trade, Transportation, & Utilities	139,400	139,400	133,000	137,400	138,600
Wholesale Trade	28,000	28,100	27,400	29,200	31,400
Retail Trade	94,600	93,700	87,900	89,700	88,800
Food & Beverage Stores	21,900	22,300	22,500	21,900	20,400
Transportation, Warehousing, and Utilities	16,800	17,500	17,700	18,500	18,500
Information	12,500	12,400	11,800	11,800	11,900
Financial Activities	34,500	34,300	33,800	34,200	34,500
Professional & Business Services	82,900	83,700	82,000	88,300	96,200
Educational & Health Services	123,100	125,200	116,900	119,600	122,200
Educational Services	30,600	31,000	27,400	28,200	29,700
Health Care & Social Assistance	92,500	94,200	89,500	91,500	92,400
Hospitals	29,300	29,900	28,700	28,600	28,500
Leisure & Hospitality	72,100	73,300	57,200	65,100	70,700
Accommodation & Food Services	12,300	12,900	9,400	11,300	12,400
Food Services & Drinking Places	59,700	60,500	47,900	53,800	58,300
Other Services	24,400	25,000	22,300	23,200	24,300
Total Government	90,300	90,700	86,100	85,500	86,200

Source: New Hampshire Employment Security, Current Employment Statistics. Last Update 3/7/2023

ANNUAL EMPLOYMENT PERCENT CHANGES	2018	2019	2020	2021	2022
TOTAL NONFARM					
New Hampshire	0.7%	1.0%	-6.6%	3.7%	3.5%
New England	0.9%	0.9%	-7.8%	3.2%	4.0%
United States	1.6%	1.3%	-5.8%	2.9%	4.3%
Private					
New Hampshire	0.9%	1.1%	-6.8%	4.4%	3.8%
New England	1.0%	1.0%	-8.4%	4.2%	3.8%
United States	1.8%	1.5%	-6.3%	3.4%	4.9%
Government					
New Hampshire	0.0%	0.4%	-5.1%	-0.7%	0.8%
New England	0.3%	0.5%	-4.0%	-0.3%	1.8%
United States	0.5%	0.7%	-2.8%	-0.1%	0.9%

ANNUAL EMPLOYMENT PERCENT CHANGES (continued)	2018	2019	2020	2021	2022
GOODS PRODUCING					
New Hampshire	2.2%	1.8%	-4.1%	1.9%	3.5%
New England	1.6%	1.4%	-5.3%	-8.3%	15.4%
United States	3.1%	1.6%	-4.8%	1.6%	4.1%
Mining & Logging					
New Hampshire	0.0%	0.0%	0.0%	0.0%	0.0%
New England	-1.7%	0.0%	-3.4%	0.0%	0.0%
United States	7.5%	0.0%	-17.5%	-6.7%	8.0%
Construction					
New Hampshire	1.9%	3.3%	0.0%	4.3%	3.1%
New England	3.1%	2.5%	-4.7%	6.3%	3.1%
United States	4.6%	2.8%	-3.1%	2.5%	4.2%
Manufacturing					
New Hampshire	2.3%	1.3%	-5.9%	1.0%	3.5%
New England	0.8%	0.8%	-5.6%	1.5%	2.4%
United States	2.0%	1.0%	-5.1%	1.5%	3.8%
Durable goods					
New Hampshire	2.5%	1.5%	-5.4%	0.8%	3.1%
New England	1.3%	0.6%	-5.1%	0.7%	1.7%
United States	2.6%	1.2%	-5.8%	1.4%	3.8%
Nondurable goods					
New Hampshire	2.3%	0.6%	-7.2%	2.4%	4.1%
New England	-0.2%	1.2%	-6.6%	3.4%	3.5%
United States	0.9%	0.8%	-3.9%	1.7%	3.8%
SERVICE PROVIDING					
New Hampshire	0.5%	0.8%	-7.0%	4.0%	3.5%
New England	0.8%	0.8%	-8.2%	3.7%	3.7%
United States	1.3%	1.3%	-5.9%	3.1%	4.3%
Trade, Transportation, & Utilities					
New Hampshire	-0.3%	0.0%	-4.6%	3.3%	0.9%
New England	-0.1%	-0.4%	-7.0%	4.1%	2.2%
United States	0.6%	0.4%	-3.8%	3.9%	3.6%
Wholesale trade					
New Hampshire	1.1%	0.4%	-2.5%	6.6%	7.5%
New England	-0.3%	-0.8%	-5.8%	2.9%	5.0%
United States	0.5%	0.8%	-4.3%	1.4%	4.4%
Retail trade					
New Hampshire	-1.0%	-1.0%	-6.2%	2.0%	-1.0%
New England	-0.7%	-1.3%	-8.4%	3.7%	0.6%
United States	-0.7%	-1.1%	-4.8%	3.0%	1.5%

ANNUAL EMPLOYMENT PERCENT CHANGES (continued)	2018	2019	2020	2021	2022
SERVICE PROVIDING (continued)					
Transportation, Warehousing, and Utilities					
New Hampshire	1.8%	4.2%	11%	4.5%	0.0%
New England	2.6%	3.2%	-3.7%	6.9%	4.7%
United States	-5.4%	4.4%	-0.4%	9.0%	8.2%
Information					
New Hampshire	-1.6%	-0.8%	-4.8%	0.0%	0.8%
New England	-0.1%	0.8%	-5.0%	2.4%	4.0%
United States	0.9%	0.9%	-5.0%	5.0%	7.6%
Financial Activities					
New Hampshire	-1.1%	-0.6%	-1.5%	1.2%	0.9%
New England	-0.1%	0.2%	-2.4%	0.2%	1.3%
United States	1.6%	1.9%	-0.6%	1.2%	2.7%
Professional & Business Services					
New Hampshire	0.9%	1.0%	-2.0%	7.7%	8.9%
New England	1.9%	1.4%	-3.7%	4.6%	4.6%
United States	2.4%	1.6%	-4.5%	5.0%	5.5%
Educational & Health Services					
New Hampshire	1.4%	1.7%	-6.6%	2.3%	2.2%
New England	0.8%	1.9%	-5.8%	2.2%	1.9%
United States	1.9%	2.2%	-3.7%	1.6%	3.0%
Leisure & Hospitality					
New Hampshire	1.7%	1.7%	-22.0%	13.8%	8.6%
New England	1.4%	0.9%	-28.1%	14.3%	12.5%
United States	1.5%	1.8%	-20.7%	7.6%	11.9%
Other Services					
New Hampshire	1.2%	2.5%	-10.8%	4.0%	4.7%
New England	2.2%	0.6%	-14.3%	4.9%	6.1%
United States	1.1%	1.0%	-9.5%	2.4%	4.6%
Source: Bureau of Labor Statistics, Current Employment Statistics; ELMI analysis. Last Update 3/20/2023					
Prepared by: New Hampshire Employment Security, Economic and Labor Market Information Bureau					
www.nhes.nh.gov/elmi (603) 228-4124					



OCCUPATIONAL TRENDS

Every year, the Economic and Labor Market Information Bureau releases short-term, two-year employment projections for industries and occupations. These projections are intended as a supplement to the long-term, ten-year projections, providing a more immediate picture of current employment trends.

Overall, employment in New Hampshire is projected to increase by nearly 10,600 jobs, or 1.5 percent, over the two-year period, from 720,390 jobs in the second quarter of 2022 to 730,980 in the second quarter of 2024. Short-term projections published one year earlier, projecting growth between the second quarter of 2021 and the second quarter of 2023, forecasted a growth rate of 3.7 percent, as the economy was starting to emerge from pandemic-related employment losses that started in spring 2020.

In contrast to long-term projections, which focus on structural changes in the economy and growth in population, short-term projections consider changes in the business cycle, which have a more immediate effect on industry employment and consequently on the demand for workers in specific occupations.

In addition to the business cycle, an overriding trend in these short-term projections is the return to normal employment levels after the coronavirus pandemic and the recession that followed. By the second quarter of 2022, many industries were still short of pre-pandemic employment, compared to employment in the second quarter of 2019.¹

Retail trade employment in the second quarter of 2022 was 5,700 workers short of employment in the second quarter of 2019 and is projected to decline further by the second quarter of 2024. (Many retail establishments that closed during the pandemic never reopened, or if they did, now maintain fewer stores or stores with fewer workers). This reflects a longer-term trend in the retail sector. A similar trend exists in food services and drinking places, where there were still 1,700

fewer jobs in the second quarter of 2022 than three years prior. Employment in that industry is projected to increase by 500 jobs by the second quarter of 2024.

Major Occupational Groups Trends

Occupational growth can be measured in three ways: the projected number of new jobs, the percent change from base year to projected year, and the number of expected annual job openings over the two-year period. Expected annual openings consider not just the increase in the total number of jobs, but also openings created by workers leaving the labor force or transferring to a different occupational family.

Best Bets by Educational Requirement

A high school student walks into their guidance counselor's office and asks, "What are some of the best occupations to pursue? I'm not sure if I want to go to college, but I want to find a job with a good outlook for the future." The guidance counselor can turn to short-term projections for some ideas.

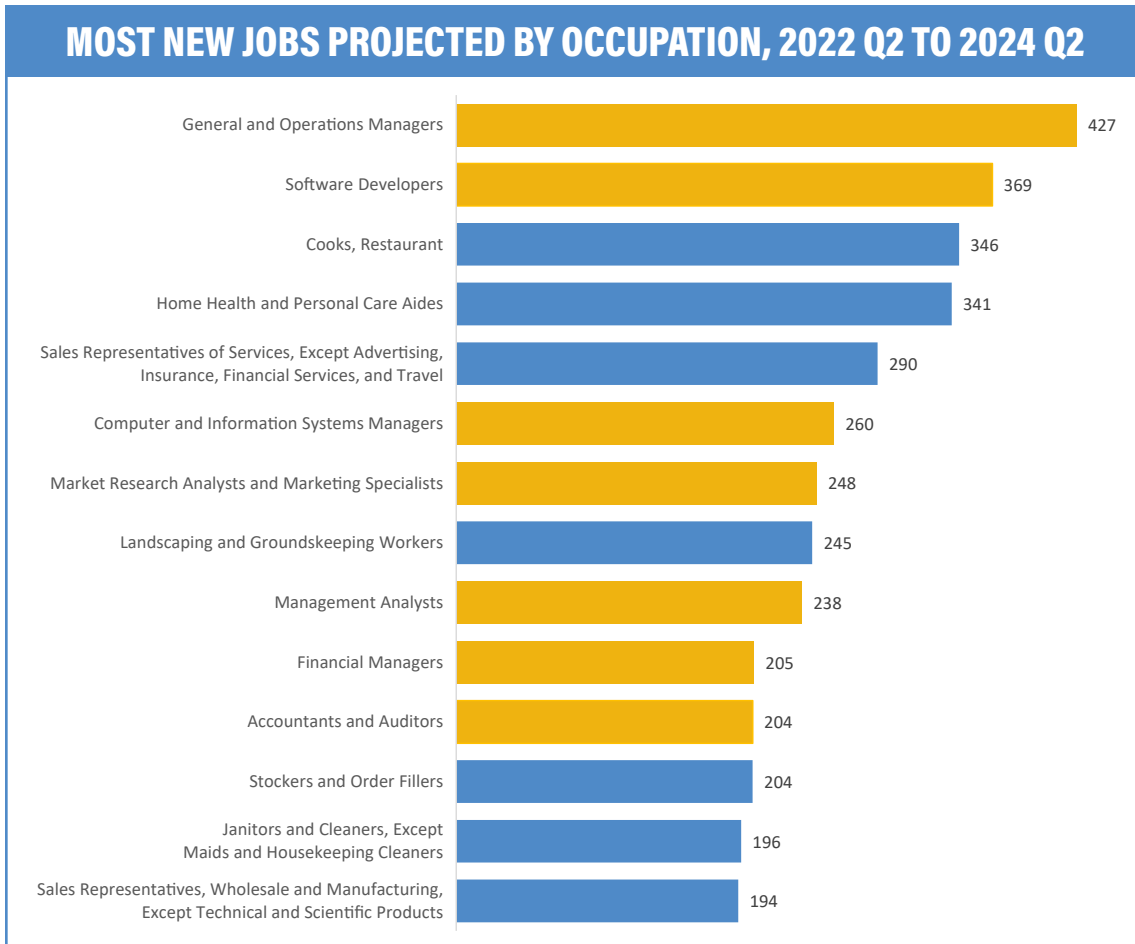
Employment projections should not be considered an exact science. It's extremely unlikely, for example, that there will be exactly 272 openings per year for computer systems analysts. Instead, students and other job seekers considering career options should think of projections as describing relative growth trends and focus on occupations with a combination of strong projected growth and many openings during the projections period. Below are some examples of "very favorable" occupations (those with both a high rate of growth and a large number of annual openings) through the second quarter of 2024. These fast-growing occupations are categorized by typical entry-level educational requirements.

Several occupations that generally require an associate's degree for entry-level positions have a favorable outlook, including computer network

¹ Projections data are not seasonally adjusted; year-over-year comparisons account for seasonality.

OCCUPATIONAL GROUPS WITH MOST PROJECTED JOBS ADDED	2022 Q2 ESTIMATED EMPLOYMENT	2024 Q2 PROJECTED EMPLOYMENT	NEW JOBS
Management Occupations	54,947	56,445	1,498
Business and Financial Operations Occupations	43,576	44,943	1,367
Computer and Mathematical Occupations	23,013	24,094	1,081
Educational Instruction and Library Occupations	43,058	43,871	813
Transportation and Material Moving Occupations	53,291	54,039	748

Source: New Hampshire Employment Security, Short-Term Employment Projections, 2022 Q2 – 2024 Q2



Source: New Hampshire Employment Security, Short-Term Employment Projections, 2022 Q2 – 2024 Q2

support specialists (5.7 percent growth and 122 annual openings). Computer network support specialists are frequently employed in the professional, scientific, and technical services sector, which is projected to be the fastest-growing sector in New Hampshire.

Physical therapy assistants also have favorable short-term prospects (5.6 percent growth, 55 annual openings) because demand for physical

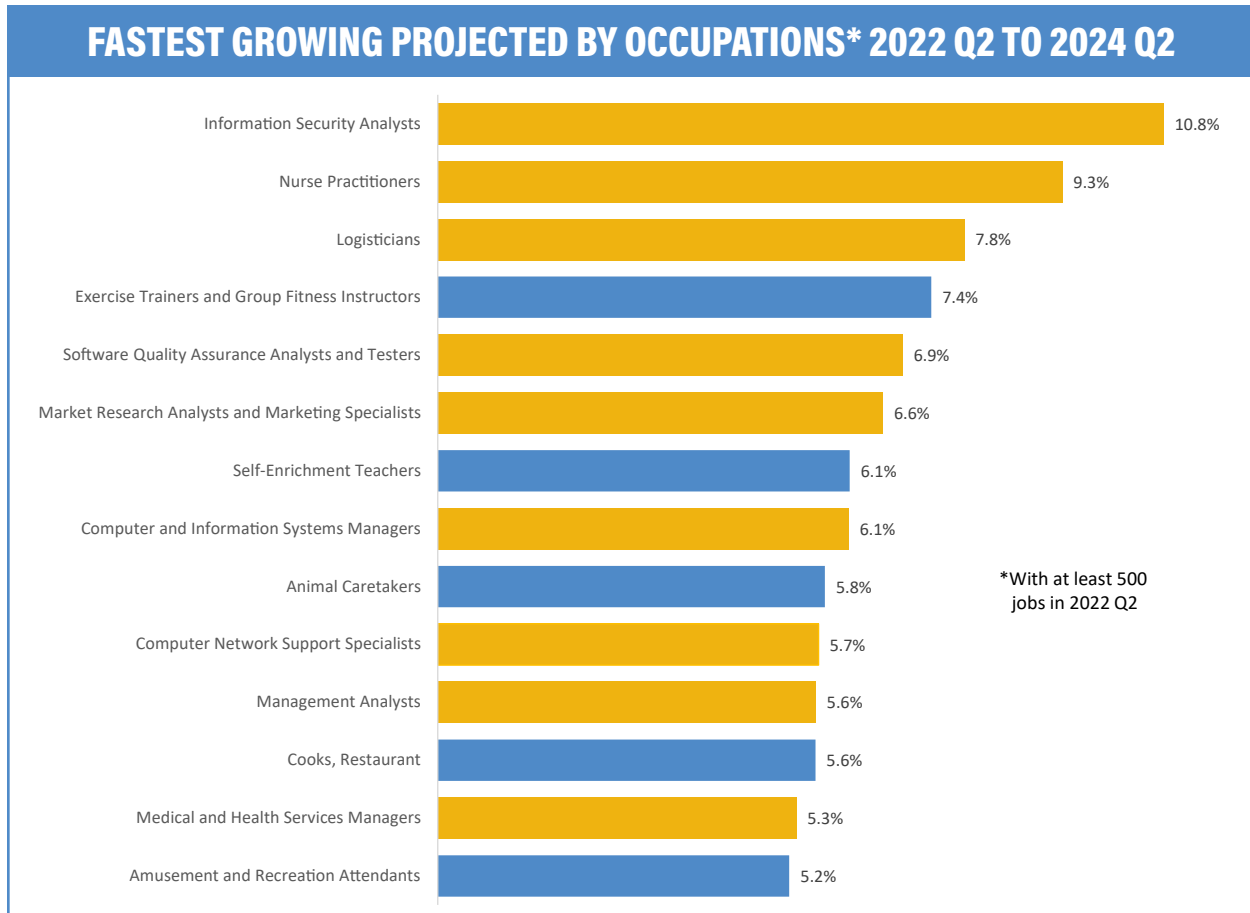
therapy is expected to increase in response to the health needs of people entering older age groups. The need to reduce healthcare costs by substituting assistants for costlier methods of patient care also contributes to positive growth for this occupation.²

Preschool teachers, except special education (3.0 percent growth, 391 annual openings) are primarily employed in daycare facilities, which were shut down during the pandemic in the spring

² U.S. Bureau of Labor Statistics, Occupational Outlook Handbook, Physical Therapist Assistants and Aides, <https://www.bls.gov/ooh/healthcare/physical-therapist-assistants-and-aides.htm#tab-6>

OCCUPATIONAL GROUPS WITH HIGHEST PROJECTED PERCENT CHANGE	2022 Q2 ESTIMATED EMPLOYMENT	2024 Q2 PROJECTED EMPLOYMENT	PERCENT CHANGE
Computer and Mathematical Occupations	23,013	24,094	4.7%
Farming, Fishing, and Forestry Occupations	3,873	4,006	3.4%
Personal Care and Service Occupations	20,116	20,796	3.4%
Life, Physical, and Social Science Occupations	5,095	5,261	3.3%
Business and Financial Operations Occupations	43,576	44,943	3.1%
Arts, Design, Entertainment, Sports, and Media Occupations	9,955	10,260	3.1%

Source: New Hampshire Employment Security, Short-Term Employment Projections, 2022 Q2 – 2024 Q2



Source: New Hampshire Employment Security, Short-Term Employment Projections, 2022 Q2 – 2024 Q2

of 2020. Employment remained below pre-pandemic levels in the the second quarter of 2022. This occupation’s growth rate is partially due to the industry recovering from the effects of the pandemic.

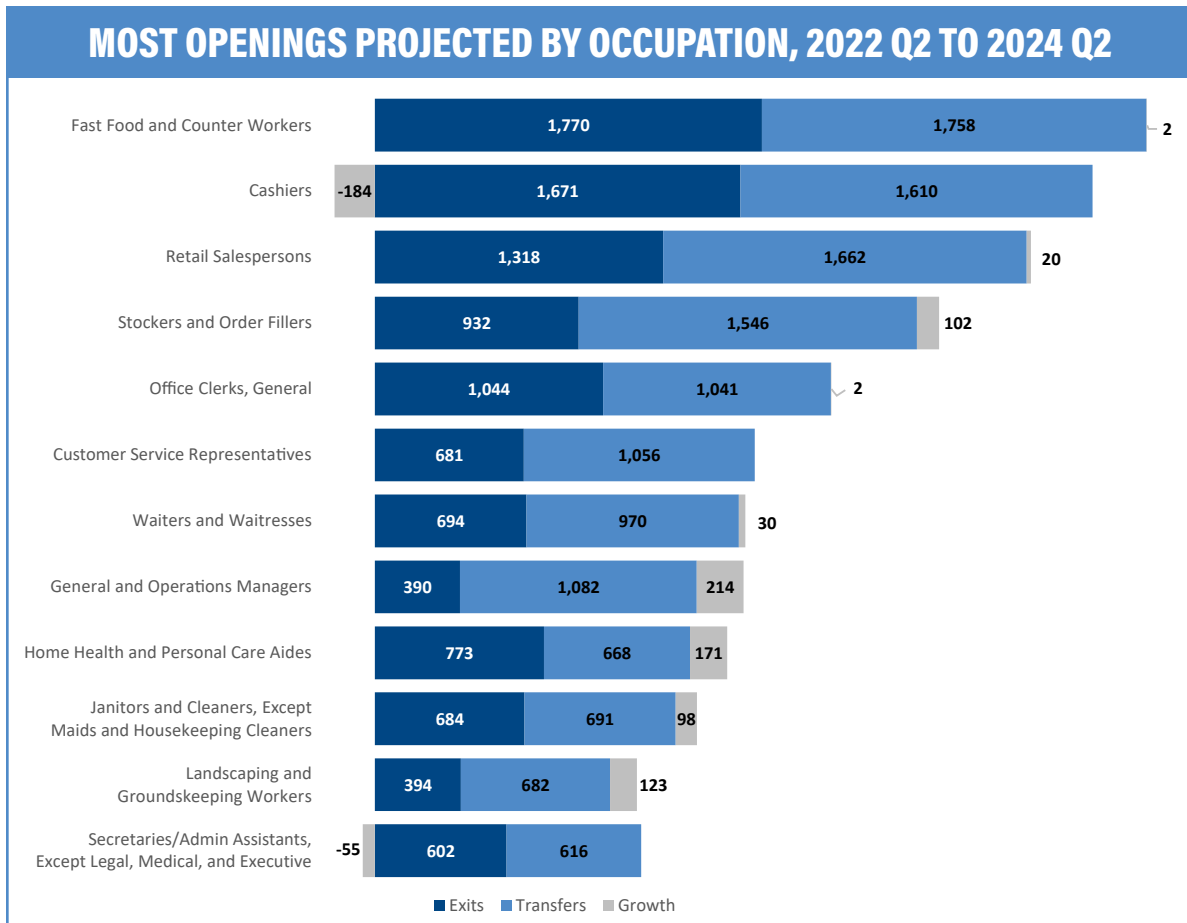
A Bachelor’s degree is the starting educational attainment for a wide variety of positions. The latest round of short-term projections projected many fast-growing occupations requiring a

bachelor’s degree, particularly computer- and business-related jobs. Computer and information systems managers (6.1 percent growth, 451 annual openings) are required in nearly all organizations to determine and implement information technology goals.³ Software developers (5.1 percent growth, 678 openings) are also employed in a wide variety of industries and include a number of specializations such as applications systems

3 U.S. Bureau of Labor Statistics, Occupational Outlook Handbook, Computer and Information Systems Managers, <https://www.bls.gov/ooh/management/computer-and-information-systems-managers.htm#tab-2>

OCCUPATIONAL GROUPS WITH MOST PROJECTED ANNUAL OPENINGS	EXITS	TRANSFERS	TOTAL
Office and Administrative Support Occupations	5,290	6,337	11,627
Food Preparation and Serving Related Occupations	4,896	5,730	10,626
Sales and Related Occupations	4,518	5,982	10,500
Transportation and Material Moving Occupations	3,000	4,562	7,562
Management Occupations	1,622	3,060	4,682

Source: New Hampshire Employment Security, Short-Term Employment Projections, 2022 Q2 – 2024 Q2



Source: New Hampshire Employment Security, Short-Term Employment Projections, 2022 Q2 – 2024 Q2

software, or software engineering. Demand for all types is needed as artificial intelligence (AI), robotics, and the Internet of Things (IoT) become an essential part of businesses. Management analysts (5.6 percent growth, 513 openings) help an organization optimize resources, either by working directly for the organization or as a consultant.

Individuals who prefer to enter the workforce immediately after high school may find favorable opportunities in occupations such as home health and personal care aides (3.6 percent growth, 1,611

openings). Home health aides provide basic health-related services under the supervision of medical practitioners, while personal care aides are limited to non-medical services such as bathing, preparing meals, or doing laundry. Stockers and order fillers (1.4 percent growth, 2,580 openings) is another occupation expected to be in demand, especially in the manufacturing and warehousing industries.

Workers can also enter the labor force with no formal education. Occupations with the most openings that generally don't require formal

education are often employed in the retail sales or accommodation and food services industry sectors.

Retail salespersons (0.2 percent growth, 3,000 openings) account for many annual job openings. While online retail has become increasingly prevalent, retail employment is projected to grow in the short-term, as brick and mortar retail recovers from the effects of the pandemic. Similar trends are expected for two occupations frequently employed in the accommodation and food services industry, waiters and waitresses (0.7 percent growth, 1,700 openings) and fast food and counter workers (no job growth, 3,530 openings).

NAICS Changes in the Short-Term Projections

Starting with the first quarter of 2022, the Quarterly Census Employment and Wages (QCEW) program began classifying establishments using 2022 North American Industry Classification System (NAICS) codes. NAICS uses a six-digit hierarchical coding system to classify all economic activity into industry sectors. These codes are revised every five years to reflect changes in economic activities, so an establishment can select the industry code that best describes their primary business activity.⁴ In the revision, some existing industries were merged or split, and several entirely new industries were created.

Short-term projections utilize these data to assess base year employment. To accommodate the NAICS code revisions, a few simplifications were required in the short-term projections covering the second quarter of 2022 to the second quarter of 2024. Much of the input data required for short-term projections requires a historical time series of employment, but prior data use the 2017 NAICS classification.

Because employment data for 2022 use the 2022 classification, there are inconsistencies in the time series. While employment under the new codes could be allocated to older codes, this would have been cumbersome and time-consuming. Instead, projections for sectors with major classification revisions have been reported at the sector (two-digit NAICS code) level, but not at more detailed levels. This affects short-term projections for the wholesale trade, retail trade and information sectors.

The 2022 NAICS revision included a number of changes within the retail trade sector, including several new codes and titles at the subsector and industry group (three- and four-digit NAICS code) levels. While the previous classification system distinguished between store-based and nonstore retailers, the increasing prevalence of online retail has led to many retailers selling through both venues, and 2022 NAICS codes no longer make a distinction between the two. Similar changes occurred in the wholesale trade sector. Other changes included the furniture and home furnishings stores and electronics and appliance stores industries, which were combined into one industry for 2022, furniture, home furnishings, electronics, and appliance retailers. Six separate clothing-related industries were combined into one industry, clothing and clothing accessories retailers, and fuel dealers were combined with gasoline stations. Several changes were made in the Information sector at the three- and four-digit NAICS levels, including a new industry classification for broadcasting and content providers, which includes media streaming distribution services, social networks, and other media networks and content providers.

– Michael Argiropolis

⁴ U.S. Bureau of Labor Statistics. 2022 North American Industry Classification System Revision.

New Hampshire Occupational Employment Projections 2020 - 2030							Average Annual Openings		
SOC Code	Occupational Group	2020 Base	2030 Projected	Numeric Change	Percent Change	Annual Growth	Exits	Transfers	Total
	Total, All Occupations	675,594	726,549	50,955	7.5%	0.7%	30,024	45,926	81,045
11-0000	Management Occupations	47,551	52,409	4,858	10.2%	1.0%	1,288	2,696	4,471
13-0000	Business and Financial Operations Occupations	35,091	38,315	3,224	9.2%	0.9%	991	2,146	3,461
15-0000	Computer and Mathematical Occupations	25,185	29,098	3,913	15.5%	1.5%	570	1,338	2,299
17-0000	Architecture and Engineering Occupations	13,767	15,018	1,251	9.1%	0.9%	344	699	1,168
19-0000	Life, Physical, and Social Science Occupations	5,106	5,614	508	9.9%	1.0%	107	375	531
21-0000	Community and Social Service Occupations	11,110	12,702	1,592	14.3%	1.3%	408	766	1,332
23-0000	Legal Occupations	3,952	4,358	406	10.3%	1.0%	112	157	309
25-0000	Education, Training, and Library Occupations	40,809	44,361	3,552	8.7%	0.8%	1,752	1,959	4,063
27-0000	Arts, Design, Entertainment, Sports, and Media Occupations	9,403	10,412	1,009	10.7%	1.0%	377	626	1,103
29-0000	Healthcare Practitioners and Technical Occupations	40,771	45,573	4,802	11.8%	1.1%	1,074	1,254	2,808
31-0000	Healthcare Support Occupations	25,729	30,381	4,652	18.1%	1.7%	1,638	1,726	3,831
33-0000	Protective Service Occupations	12,174	13,157	983	8.1%	0.8%	556	752	1,407
35-0000	Food Preparation and Serving Related Occupations	48,311	58,426	10,115	20.9%	1.9%	3,973	5,427	10,413
37-0000	Building and Grounds Cleaning and Maintenance Occupations	24,571	26,282	1,711	7.0%	0.7%	1,395	1,884	3,449
39-0000	Personal Care and Service Occupations	17,608	21,759	4,151	23.6%	2.0%	1,184	1,520	3,116
41-0000	Sales and Related Occupations	75,522	73,757	-1,765	-2.3%	-0.2%	3,940	5,978	9,743
43-0000	Office and Administrative Support Occupations	92,899	90,838	-2,061	-2.2%	-0.2%	4,429	5,623	9,844
45-0000	Farming, Fishing, and Forestry Occupations	3,838	4,065	227	5.9%	0.6%	165	449	638
47-0000	Construction and Extraction Occupations	25,420	27,272	1,852	7.3%	0.7%	799	1,780	2,769
49-0000	Installation, Maintenance, and Repair Occupations	25,159	27,266	2,107	8.4%	0.8%	815	1,681	2,705
51-0000	Production Occupations	41,430	41,069	-361	-0.9%	-0.1%	1,556	2,926	4,448
53-0000	Transportation and Material Moving Occupations	50,188	54,417	4,229	8.4%	0.8%	2,551	4,164	7,137

Top Employment Prospects, 2020 to 2030 (Very Favorable with most openings)							Average Annual Openings			Training Categories
SOC Code	Occupational Group	2020 Base	2030 Projected	Numeric Change	Percent Change	Annual Growth	Exits	Transfers	Total	Education Experience On-the-Job Training
11-1021	General and Operations Managers	13,173	14,432	1,259	9.6%	0.9%	276	856	1,258	Bachelor's 5+ yrs none
13-2011	Accountants and Auditors	5,748	6,244	496	0.8%	0.8%	167	355	572	Bachelor's none none
15-1256	Software Developers and Software Quality Assurance Analysts and Testers	10,430	12,916	2,486	23.8%	2.2%	271	572	1,092	Bachelor's none none
25-9045	Teaching Assistants, Except Postsecondary	9,293	9,956	663	7.1%	0.7%	430	450	946	Some College none none
29-1141	Registered Nurses	14,008	15,239	1,231	8.8%	0.9%	390	368	881	Associate's none none
31-1120	Home Health and Personal Care Aides	8,408	10,965	2,557	30.4%	2.7%	620	548	1,424	High School none Short OJT
31-1131	Nursing Assistants	7,743	8,272	529	6.8%	0.7%	513	453	1,019	Postsecondary none none
35-1012	First-Line Supervisors of Food Preparation and Serving Workers	3,319	3,999	680	20.5%	1.9%	163	373	604	High School < 5 yrs none
35-2014	Cooks, Restaurant	4,741	7,168	2,427	51.2%	4.2%	350	510	1,103	none < 5 yrs Moderate OJT
35-3011	Bartenders	2,963	3,945	982	33.1%	2.9%	156	418	672	none none Short OJT
35-3023	Fast Food and Counter Workers	13,393	15,450	2,057	15.4%	1.4%	1,398	1,525	3,129	none none Short OJT
35-3031	Waiters and Waitresses	8,735	10,587	1,852	21.2%	1.9%	709	1,154	2,048	none none Short OJT
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	9,462	10,013	551	5.8%	0.6%	608	682	1,345	none none Short OJT
37-2012	Maids and Housekeeping Cleaners	4,817	5,242	425	8.8%	0.9%	342	324	708	none none Short OJT
37-3011	Landscaping and Groundskeeping Workers	6,758	7,315	557	8.2%	0.8%	303	603	962	none none Short OJT
39-9011	Childcare Workers	3,555	3,823	268	7.5%	0.7%	248	258	533	High School none Short OJT
41-1011	First-Line Supervisors of Retail Sales Workers	7,885	7,396	-489	-6.2%	-0.6%	270	529	750	High School < 5 yrs none
41-2011	Cashiers	20,437	18,535	-1,902	-9.3%	-1.0%	1,658	1,866	3,334	none none Short OJT
41-2031	Retail Salespersons	20,854	20,030	-824	-4.0%	-0.4%	1,143	1,688	2,749	none none Short OJT
41-3091	Sales Representatives of Services, Except Advertising, Insurance, Financial Services, and Travel	4,223	4,597	374	8.9%	0.9%	111	388	536	High School none Moderate OJT
41-4012	Sales Representatives, Wholesale and Manufacturing, Except Technical and Scientific Products	7,119	7,427	308	4.3%	0.4%	215	491	737	High School none Moderate OJT
43-1011	First-Line Supervisors of Office and Administrative Support Workers	7,439	7,411	-28	-0.4%	0.0%	276	454	727	High School < 5 yrs none



Top Employment Prospects, 2020 to 2030 (Very Favorable with most openings) (continued...)							Average Annual Openings			Training Categories
SOC Code	Occupational Group	2020 Base	2030 Projected	Numeric Change	Percent Change	Annual Growth	Exits	Transfers	Total	Education Experience On-the-Job Training
43-3031	Bookkeeping, Accounting, and Auditing Clerks	8,125	8,025	-100	-1.2%	-0.1%	473	412	875	Some College none Moderate OJT
43-4051	Customer Service Representatives	11,095	10,831	-264	-2.4%	-0.2%	515	862	1,351	High School none Short OJT
43-4171	Receptionists and Information Clerks	4,467	4,730	263	5.9%	0.6%	257	318	601	High School none Short OJT

Occupations with the highest number of average annual openings, 2020 to 2030, by entry-level education							Average Annual Openings			
SOC Code	Occupational Group	2020 Base	2030 Projected	Numeric Change	Percent Change	Annual Growth	Exits	Transfers	Total	
Entry-level education: no formal educational credential										
35-3023	Fast Food and Counter Workers	13,393	15,450	2,057	15.4%		1,398	1,525	3,129	
35-3031	Waiters and Waitresses	8,735	10,587	1,852	21.2%		709	1,154	2,048	
37-2011	Janitors and Cleaners, Except Maids and Housekeeping Cleaners	9,462	10,013	551	5.8%		608	682	1,345	
41-2011	Cashiers	20,437	18,535	-1,902	-9.3%		1,658	1,866	3,334	
41-2031	Retail Salespersons	20,854	20,030	-824	-4.0%		1,143	1,688	2,749	
Entry-level education: High School Diploma or Equivalent										
31-1120	Home Health and Personal Care Aides	8,408	10,965	2,557	30.4%		620	548	1,424	
43-4051	Customer Service Representatives	11,095	10,831	-264	-2.4%		515	862	1,351	
43-6014	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	10,434	9,650	-784	-7.5%		511	561	994	
43-9061	Office Clerks, General	16,772	16,646	-126	-0.8%		912	991	1,890	
53-7065	Stockers and Order Fillers	14,153	15,133	980	6.9%		834	1,428	2,360	
Entry-level education: Some College, No Degree										
15-1232	Computer User Support Specialists	2,958	3,210	252	8.5%		58	163	246	
25-9045	Teaching Assistants, Except Postsecondary	9,293	9,956	663	7.1%		430	450	946	
43-3031	Bookkeeping, Accounting, and Auditing Clerks	8,125	8,025	-100	-1.2%		473	412	875	
43-4151	Order Clerks	509	409	-100	-19.6%		20	29	39	
49-2011	Computer, Automated Teller, and Office Machine Repairers	653	636	-17	-2.6%		20	49	67	
Entry-level education: Postsecondary Non-Degree Award										
31-1131	Nursing Assistants	7,743	8,272	529	6.8%		513	453	1,019	
31-9092	Medical Assistants	2,864	3,399	535	18.7%		128	234	416	
39-5012	Hairdressers, Hairstylists, and Cosmetologists	3,482	4,155	673	19.3%		202	212	481	
49-3023	Automotive Service Technicians and Mechanics	3,871	3,986	115	3.0%		117	266	395	
53-3032	Heavy and Tractor-Trailer Truck Drivers	7,491	7,979	488	6.5%		317	524	890	

Occupations with the highest number of average annual openings, 2020 to 2030, by entry-level education (continued...)						Average Annual Openings		
SOC Code	Occupational Group	2020 Base	2030 Projected	Numeric Change	Percent Change	Exits	Transfers	Total
Entry-level education: Associate's Degree								
23-2011	Paralegals and Legal Assistants	1,170	1,324	154	13.2%	48	84	147
25-2011	Preschool Teachers, Except Special Education	2,753	3,320	567	20.6%	124	177	358
29-1141	Registered Nurses	14,008	15,239	1,231	8.8%	390	368	881
29-1292	Dental Hygienists	1,451	1,624	173	11.9%	55	38	110
29-2056	Veterinary Technologists and Technicians	961	1,168	207	21.5%	29	46	96
Entry-level education: Bachelor's Degree								
11-1021	General and Operations Managers	13,173	14,432	1,259	9.6%	276	856	1,258
13-1198	Project Management Specialists and Business Operations Specialists, All Other	5,143	5,425	282	5.5%	122	259	409
13-2011	Accountants and Auditors	5,748	6,244	496	8.6%	167	355	572
15-1256	Software Developers and Software Quality Assurance Analysts and Testers	10,430	12,916	2,486	23.8%	271	572	1,092
25-2021	Elementary School Teachers, Except Special Education	6,321	6,679	358	5.7%	200	260	496
Entry-level education: Master's Degree								
11-9032	Education Administrators, Kindergarten through Secondary	1,336	1,418	82	6.1%	34	64	106
21-1012	Educational, Guidance, and Career Counselors and Advisors	2,055	2,282	227	11.0%	71	128	222
25-4022	Librarians and Media Collections Specialists	1,047	1,122	75	7.2%	53	47	108
29-1127	Speech-Language Pathologists	925	1,188	263	28.4%	25	38	89
29-1171	Nurse Practitioners	1,089	1,734	645	59.2%	30	44	138
Entry-level education: Doctorate or Professional Degree								
23-1011	Lawyers	2,361	2,611	250	10.6%	54	61	140
25-1011	Business Teachers, Postsecondary	490	517	27	5.5%	22	24	49
25-1071	Health Specialties Teachers, Postsecondary	418	508	90	21.5%	21	22	52
29-1123	Physical Therapists	1,277	1,535	258	20.2%	28	29	83
29-1228	Physicians, All Other; and Ophthalmologists, Except Pediatric	1,802	1,898	96	5.3%	30	21	61
Source: New Hampshire Employment Security, Long-Term Occupational Projections; Updated: 3/3/2022								
Prepared by: New Hampshire Employment Security, Economic and Labor Market Information Bureau								
www.nhes.nh.gov/elmi (603) 228-4124								

PRIVATE ENTERPRISE

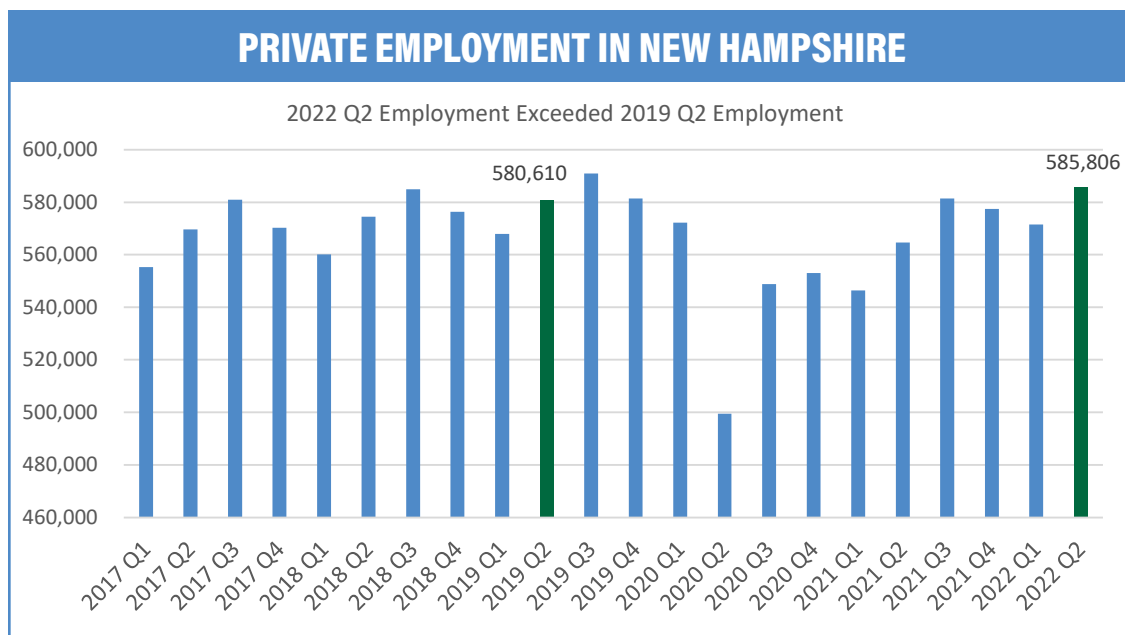
New Hampshire's private sector experienced strong employment growth in 2021, continuing to recover from job losses experienced during the coronavirus pandemic. Annual private employment averaged 567,574 workers in 2021, a 4.6 percent increase from 2020 levels, but 2.2 percent (approximately 12,800 workers) below 2019 employment. Private employment continued to grow through the first two quarters of 2022, averaging 585,810 workers in the second quarter. This exceeded private employment in the second quarter of 2019 by approximately 5,200 workers, surpassing pre-pandemic employment levels for the first time, although public sector employment and total employment remained slightly below pre-pandemic levels.¹

High Tech Firms

While total private employment in New Hampshire declined by 6.5 percent in 2020, high tech employment fell by just 0.5 percent. In 2021, high tech employment grew by 6.2 percent, its highest growth rate since at least 2000. High tech industries are those that employ at least twice

the average amount of workers in scientific, engineering, and technician occupations.² There are 45 high tech industries, with most of them falling within the manufacturing, information, and professional, scientific, and technical services sectors. In 2021, 14 percent of privately employed workers, 79,150 workers, were employed in high tech industries. High tech employment is categorized into three levels: level I has the highest concentration of technology-oriented workers, at least five times higher than average. Level II industries employ workers in high tech occupations between 3.0 and 4.9 times the average rate, and level III employ workers in high tech occupations at 2.0 to 2.9 times the average rate.

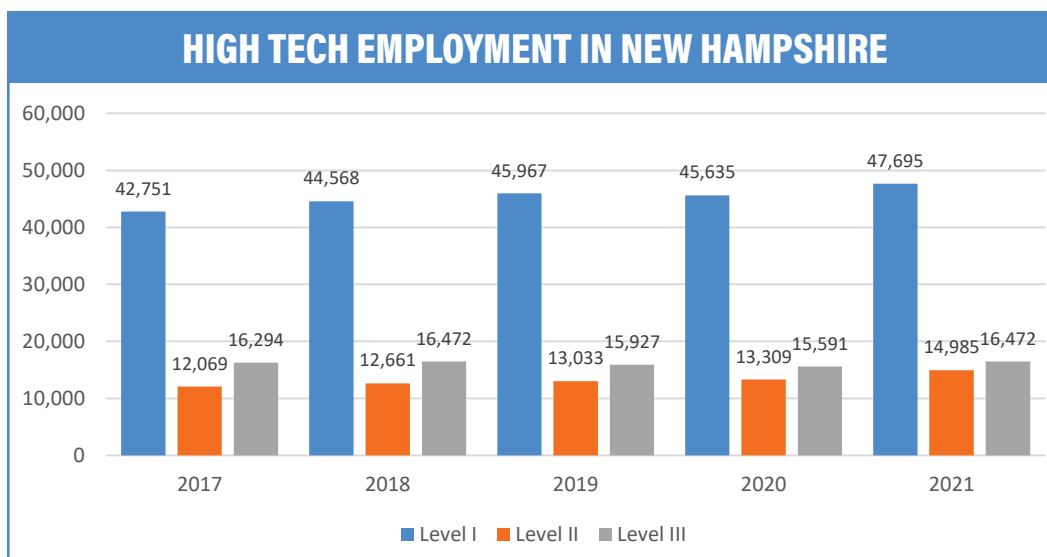
Employment in level I high tech industries declined by 330 jobs (0.7 percent) in 2020, before adding 2,060 (4.5 percent) in 2021. Level I manufacturing industries were most affected by the pandemic, losing nearly 1,000 jobs in 2020, and an additional 350 jobs in 2021. Employment for level I industries in the information and professional, scientific, and technical services sectors increased slightly in 2020, followed by larger gains in 2021.



Source: New Hampshire Employment Security, Quarterly Census of Employment and Wages

¹ Due to seasonal employment trends, employment should be compared year-over-year, rather than quarter-to-quarter.

² Daniel E Hecker, "High-technology employment: a NAICS-based update." *Monthly Labor Review*, July 2005. <https://www.bls.gov/opub/mlr/2005/07/art6full.pdf>



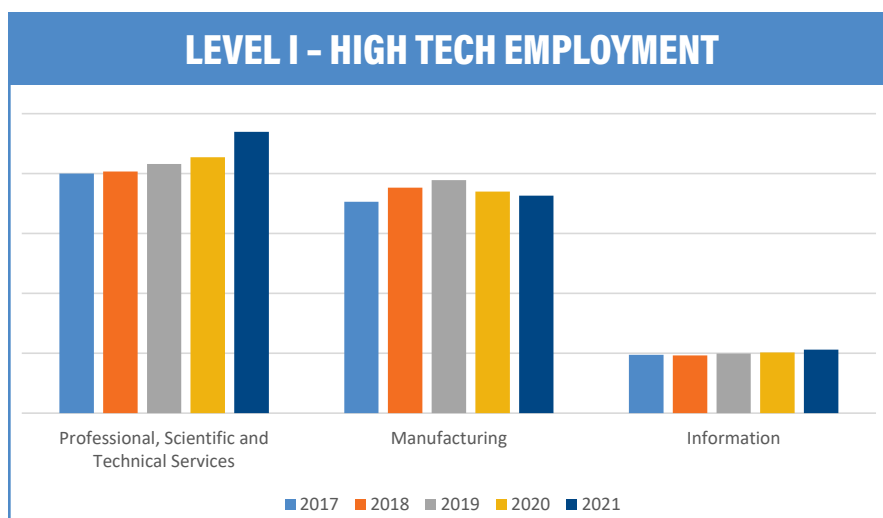
Source: New Hampshire Employment Security, Quarterly Census of Employment and Wages

Level II high tech industries grew 2.1 percent in 2020, followed by 12.6 percent growth in 2021. Two industries were responsible for the majority of this growth: professional and commercial equipment and supplies merchant wholesalers (part of the wholesale trade sector), and management, scientific, and technical consulting services (part of the professional, scientific, and technical services sector).

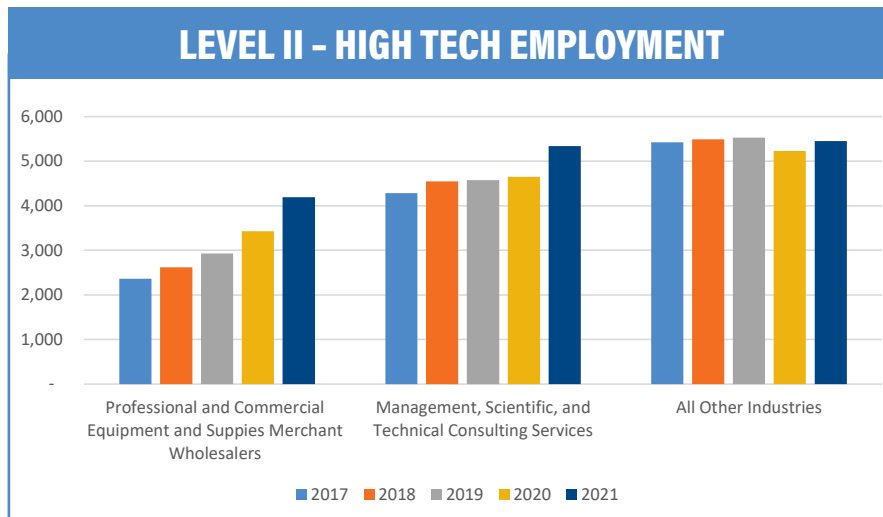
After declining in 2016 and 2017, employment in professional and commercial equipment and supplies merchant wholesalers increased by more than ten percent in 2018 and 2019. Employment growth accelerated during the pandemic, increasing by 17 percent in 2020 and by 22 percent in 2021. Employment in management, scientific,

and technical consulting services also accelerated during the pandemic. Employment increased by 70 jobs (1.6 percent) in 2020, before adding 700 (14.9 percent) in 2021.

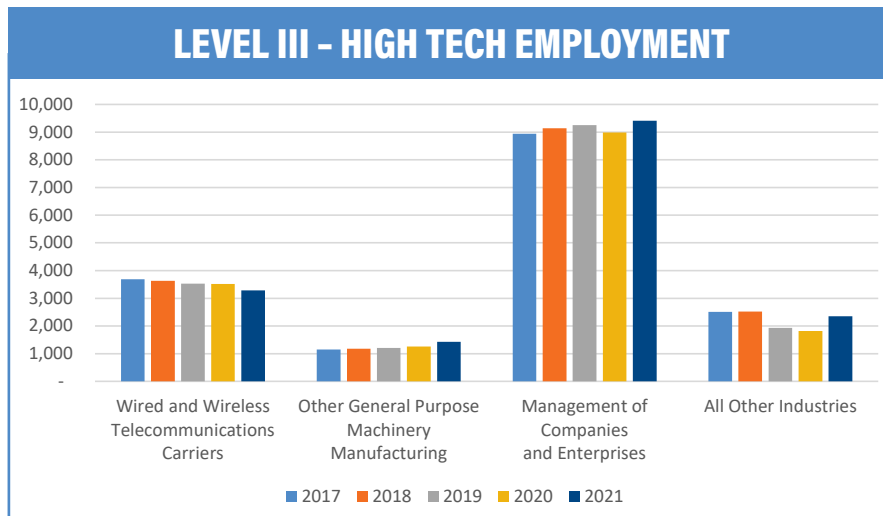
Employment in level III high tech industries declined in 2019 and 2020, losing nearly 900 jobs (5.3 percent) over that time. Employment returned to 2018 levels in 2021, with most of the employment gains in management of companies and enterprises and other general purpose machinery manufacturing. Employment in the wired and wireless telecommunications carriers industry, part of the information sector, declined between 2017 and 2021. Employment declined by 400 jobs (11.1 percent), with more than half of those jobs lost in 2021.



Source: New Hampshire Employment Security, Quarterly Census of Employment and Wages



Source: New Hampshire Employment Security, Quarterly Census of Employment and Wages



Source: New Hampshire Employment Security, Quarterly Census of Employment and Wages

Firms by Size Data

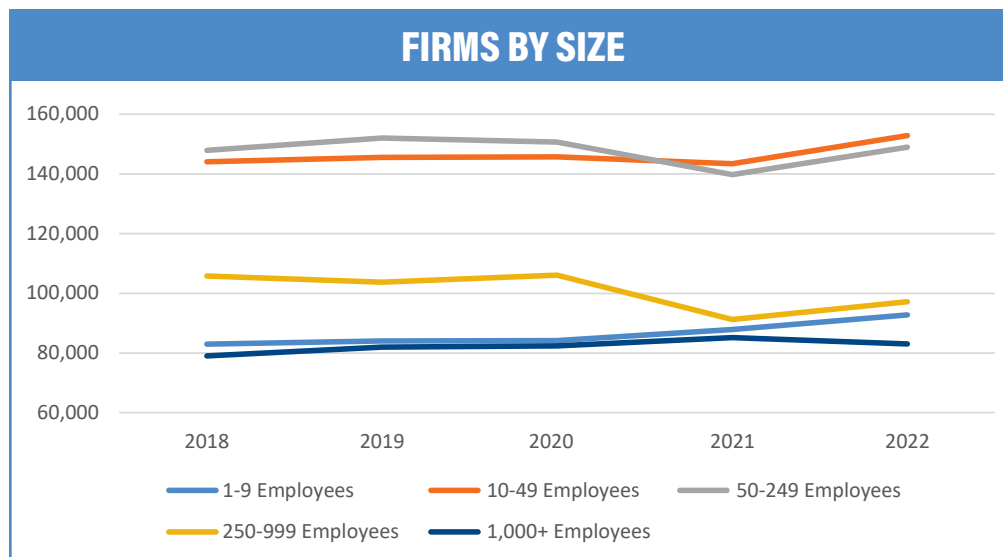
Firms by Size data provide information about employment and firm size, based on the number of workers firms employ during March of every year. Between March 2020 and March 2021, employment declined 3.9 percent, but employment by both the largest and smallest firms – those with either 1,000 or more New Hampshire-based employees, or those with between one and nine employees – increased.³

This trend did not continue between March 2021 and March 2022. Employment by firms with 1,000 or more employees declined by 2,100, partially because the number of firms with 1,000 or more employees declined by one. Employment by firms with between one and nine employees continued to grow, increasing by 4,860 workers, but the

majority of employment growth came from firms with between ten and 999 employees, size categories that had lost workers over the previous year. Employment by firms with between 20 and 99 workers increased by 14,050 workers, accounting for just over half of all employment growth. The number of private employers increased by nearly 3,000 from March 2021 to March 2022. With the exception of firms employing more than 1,000 workers, the number of employers in every size category increased. The number of employers with between one and nine employees increased by 2,440, accounting for more than 80 percent of the increase in employers.

– Greg David

³ Change in employment and change in number of employers can reflect new firms, or firms adding or losing employees to move into a different size category.



Source: New Hampshire Employment Security, Quarterly Census of Employment and Wages

FIRMS BY SIZE*	2018	2019	2020	2021	2022
Total Number of Firms with employment	37,092	37,704	38,180	39,771	42,744
1 - 4 employees	21,921	22,270	22,785	24,504	26,602
5 - 9 employees	6,318	6,445	6,372	6,482	6,822
10 - 19 employees	4,159	4,271	4,327	4,265	4,461
20 - 49 employees	2,910	2,891	2,877	2,860	3,070
50 - 99 employees	979	1,019	1,007	905	1,017
100 - 249 employees	537	540	536	508	513
250 - 499 employees	171	168	177	157	164
500 - 999 employees	67	68	68	56	62
1,000 & over employees	30	32	31	34	33
Over-the-year Change in Number of Firms	475	612	476	1,591	2,973
Net Annual Change in Number of Employees	4,874	7,576	1,662	-21,481	27,385
1 - 4 employees	774	392	678	2,904	2,832
5 - 9 employees	-270	746	-633	903	2,028
10 - 19 employees	722	1,483	810	-1,090	2,916
20 - 49 employees	2,728	-41	-636	-1,194	6,502
50 - 99 employees	12	2,722	-784	-7,227	7,548
100 - 249 employees	1,066	1,478	-566	-3,712	1,708
250 - 499 employees	3,104	-1,887	2,342	-6,599	1,918
500 - 999 employees	-1,957	-236	65	-8,298	4,029
1,000 & over employees	-1,305	2,919	386	2,832	-2,096

FIRMS BY SIZE* (continued...)	2018	2019	2020	2021	2022
Percent of Total Employment					
1 - 4 employees	7.3%	7.3%	7.4%	8.2%	8.3%
5 - 9 employees	7.5%	7.5%	7.4%	7.8%	7.8%
10 - 19 employees	10.0%	10.1%	10.3%	10.5%	10.5%
20 - 49 employees	15.7%	15.4%	15.3%	15.7%	16.1%
50 - 99 employees	12.0%	12.3%	12.2%	11.3%	12.1%
100 - 249 employees	14.4%	14.5%	14.3%	14.2%	13.8%
250 - 499 employees	10.7%	10.3%	10.6%	9.8%	9.7%
500 - 999 employees	8.2%	8.1%	8.0%	6.8%	7.2%
1,000 & over employees	14.1%	14.5%	14.5%	15.6%	14.4%
* Firms by size numbers are based on March covered employment data, in each calendar year.					
Source: New Hampshire Employment Security, ELMI. Last Update 12/20/2022					

FIRMS SUBJECT TO UNEMPLOYMENT COMPENSATION	2017	2018	2019	2020	2021
Total Firms	43,118	43,720	44,616	46,654	50,083
New firms	5,687	6,060	6,033	7,016	9,148
Terminated firms	4,941	5,319	5,013	4,732	5,346
Source: New Hampshire Employment Security. Last Update 12/20/2022					

PERCENT OF ESTABLISHMENTS WITH 100+ WORKERS (Ranked from highest among 50 states and D.C.)	2017	2018	2019	2020	2021
New Hampshire	2.3%	2.3%	2.4%	2.4%	
United States rank	29	30	24	28	
Connecticut	2.7%	2.7%	2.7%	2.7%	
United States rank	11	15	12	11	
MAINE	1.7%	1.7%	1.7%	1.7%	
United States rank	46	47	46	47	
Massachusetts	2.9%	2.9%	2.9%	2.9%	
United States rank	6	6	5	5	
Rhode Island	2.3%	2.3%	2.3%	2.3%	
United States rank	30	27	31	31	
Vermont	1.6%	1.6%	1.7%	1.7%	
United States rank	48	48	47	46	
Source: County to County Business Patterns, U.S. Census Bureau, ELMI Analysis. Last Update 12/20/2022					

HIGH TECH BY NAICS	2017	2018	2019	2020	2021
Total Units	5,819	6,363	6,782	7,306	8,606
Level I Units	3,441	3,750	4,091	4,343	4,976
Level II Units	1,442	1,652	1,792	2,028	2,669
Level III Units	936	961	899	935	961
Total Annual Average Employment	71,114	73,701	74,927	74,535	79,152
Level I Annual Average Employment	42,751	44,568	45,967	45,635	47,695
Level II Annual Average Employment	12,069	12,661	13,033	13,309	14,985
Level III Annual Average Employment	16,294	16,472	15,927	15,591	16,472
Total Wages (in millions)	\$7,159.3	\$7,571.9	\$7,959.5	\$8,483.1	\$11,663.0
Level I Wages	\$4,465.7	\$4,791.4	\$5,067.1	\$5,389.0	\$5,955.5
Level II Wages	\$1,179.5	\$1,291.6	\$1,362.0	\$1,529.9	\$1,897.3
Level III Wages	\$1,514.1	\$1,488.9	\$1,530.4	\$1,564.3	\$3,810.2
Average Weekly Wage	\$1,936	\$1,976	\$2,043	\$2,189	\$2,834
Level I Average Weekly Wage	\$2,009	\$2,067	\$2,120	\$2,271	\$2,401
Level II Average Weekly Wage	\$1,879	\$1,962	\$2,010	\$2,211	\$2,435
Level III Average Weekly Wage	\$1,787	\$1,738	\$1,848	\$1,929	\$4,448
Definitions of High Tech Level I, Level II, and Level III can be found at: http://www.nhes.nh.gov/elmi/products/documents/ec-high-tech-10.pdf					
Source: New Hampshire Employment Security, ELMI. Last Update 12/20/2022					

NON-CURRENT LOANS AND LEASES (\$ Millions)	2017	2018	2019	2020	2021
FDIC commercial banks, Dec. 31st totals (Millions)	\$76	\$12.5	\$8.5	\$7.9	\$5.1
Percent change from previous year	-34.2%	65.4%	-31.7%	-7.5%	-35.5%
Source: Federal Deposit Insurance Corporation, ELMI Analysis. Last Update 3/24/2023					
Prepared by: New Hampshire Employment Security, Economic and Labor Market Information Bureau					
www.nhes.nh.gov/elmi (603) 228-4124					

TRANSPORTATION AND TRAFFIC

Drivers Licenses and Motor Vehicle Registrations

In 2021, there were 1,174,826 active New Hampshire driver's licenses. This was a 10.8 percent increase from 2020 but was in line with the annual number of active driver's licenses prior to the pandemic. For most demographic groups, there was a decrease in the number of licenses in 2020 but a return to pre-pandemic levels in 2021. There was a larger increase in the number of licenses for drivers aged 65 and over, with an increase of 65,481 licenses or 25.9 percent. Since 2017, the number of licensed drivers aged 65 or older has risen 41.8 percent.

Licensing for drivers aged 19 and younger has slowly declined, with an 18.5 percent decrease since 2017. From 2019 to 2020, there was an 8.8 percent decrease in the number of licenses, followed by a 6.3 percent increase in 2021. Since the pandemic limited the availability of both driver's education courses and appointments for licensing at the Division of Motor Vehicles, this pattern is to be expected.

From 2017 to 2021, the number of automobiles registered in the state decreased by 47,240. However, the total number of motor vehicle registrations increased by 98,832, or 7.5 percent. Most of this increase was attributed to registrations of trucks and motorcycles, which rose by 19.2 percent and 7.9 percent, respectively, during this period. Bus registrations declined 15.6 percent over the last five years, with a decrease in registrations of public school buses and state, county, and municipal bus registrations accounting for most of that decline.

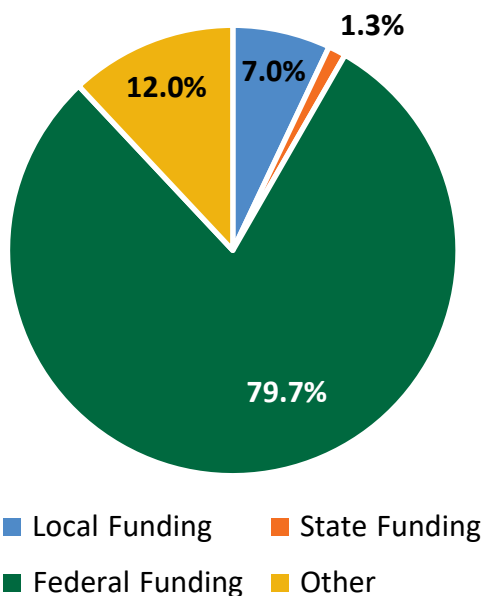
Public Transportation

In New Hampshire, there are five agencies supporting transportation in urbanized areas, with additional access to more rural and suburban areas in their regions, and five agencies that specifically target rural communities. There are several community agencies that also offer transportation as part of their support services, and receive grant funding for transportation services.¹ Most of these transportation agencies are operated by private, non-profit transportation agencies.

In 2021, New Hampshire ranked 48th among the 50 states for total public transportation funding, which included state, local, and federal funding. State funding for public transportation made up 1.3 percent of total funding for public transportation in New Hampshire.² The state Constitution prohibits use of gas tax revenue for non-highway expenses and there is no dedicated funding stream for public transportation, therefore most public transportation agencies are funded through federal grants, fare revenue, and other partnerships.

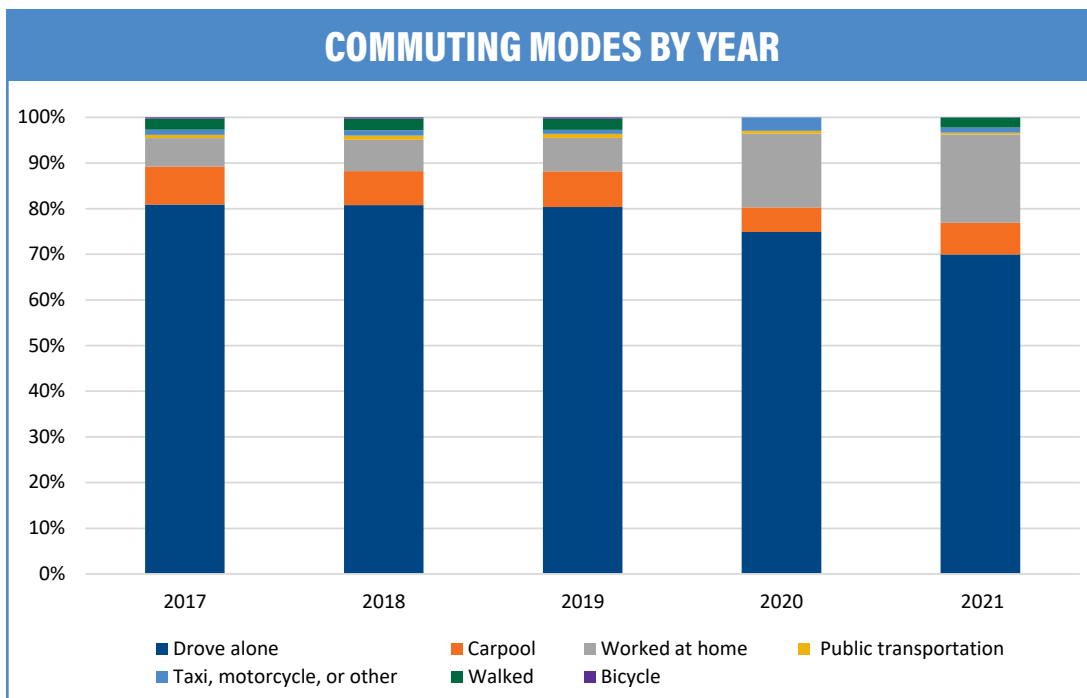
New Hampshire's Department of Transportation also began preliminary research and design to explore the expansion of the Massachusetts Bay

FUNDING FOR PUBLIC TRANSPORTATION BY SOURCE



Source: U.S. Department of Transportation, Federal Transit Administration

¹ New Hampshire Department of Transportation. 2021. 2021 Public Transportation in NH. https://www.nh.gov/dot/org/aerorailtransit/railandtransit/documents/2021_public_transport_nh.pdf
² U.S. Department of Transportation, Federal Transit Administration, National Transit Database. 2021. 2021 Funding Sources.



Source: U.S. Department of Transportation, Bureau of Transportation Statistics

Transit Authority Commuter Rail into Manchester. The project would extend the railway an additional 30 miles to connect Manchester to Lowell and aim to include four passenger stations, a layover facility, upgraded rail bridges, and rail service frequency comparable to the existing Lowell line.³

Commuting Modes

In 2021, the most popular method of commuting for New Hampshire residents continued to be driving alone, at 69.9 percent of commuters. The proportion of commuters driving alone has steadily declined since 2017, when 80.9 percent drove alone. The second most common method of commuting has switched from carpooling to working from home, since opportunities for remote work have expanded. Since 2017, carpooling has dropped from 8.3 percent of commuters to 6.9 percent and working from home has risen from 6.2 percent to 19.3 percent of commuters. The percentage of commuters taking public transportation and biking to work decreased over the last five years as well,

whereas the share of commuters walking or taking a taxi, motorcycle, or other mode of transportation has stayed about the same.⁴

Airport Traffic and Development

In 2021, passenger traffic at Manchester-Boston Regional Airport (MHT) began to recover from the sharp decline in 2020, increasing by 55.1 percent. Reducing pandemic-related travel restrictions, as well as the numerous investments aimed at improving passenger experience, encouraged passengers to resume their travels in 2021. Through a branding partnership with Fidelity Investments, MHT opened a business center in September 2021, which offers numerous private and small group workstations.⁵ Additionally, the airport announced selection of LAZ Parking to manage parking and ground transportation services, beginning in mid-2022. Services will include valet parking, shuttle services, a parking guidance system, an improved FASTPASS and rewards program, among other services, to make parking more convenient.⁶

3 New Hampshire Department of Transportation. 2021. The Nashua-Manchester Passenger Rail (Capital Corridor) Project. <https://www.nh.gov/dot/projects/nashuamanchester40818/documents/40818-fct-08062021.pdf>

4 US Department of Transportation, Bureau of Transportation Statistics. 2022. State Transportation Statistics: Commute Mode.

5 Manchester-Boston Regional Airport. 2022. Fidelity Investments and Manchester-Boston Regional Airport Announce Partnership for Airport Business Center. <https://www.flymanchester.com/news/fidelity-investments-and-manchester-boston-regional-airport-announce-partnership-for-airport-business-center/>

6 Manchester-Boston Regional Airport. 2022. LAZ Selected by Manchester-Boston Regional Airport to Provide Parking & Ground Transportation Services. <https://www.flymanchester.com/news/laz-selected-by-manchester-boston-regional-airport-to-provide-parking-ground-transportation-services/>

There was also an increase in the availability of flights for passengers. The introduction of Spirit Airlines and the resumption of service from United Airlines increased access to nonstop flights to popular destinations, including connections for international flights. Additionally, Spirit introduced MHT’s first nonstop flight to South Carolina, with daily flights to Myrtle Beach. Several airlines announced their plans to upgrade to larger aircrafts and add additional routes to high-demand destinations in 2022.

There was a small decrease in the amount of cargo passing through MHT in 2021, down 2.3 percent from 2020. However, this was still higher than previous years’ cargo shipments at 103,445 tons. To accommodate for the growth in their cargo services, MHT has been involved with the development of several cargo facilities nearby. The airport partnered with Realterm to establish a 65,000 square-foot multi-tenant cargo warehouse, nearly doubling their cargo storage capacity, and partnered with Amazon Air to launch a daily cargo service in 2022.⁷

Electric Vehicles

New Hampshire has seen an increase in elective vehicles (EVs) on the roads. The number of EVs registered in New Hampshire increased from 2,690 in 2020 to 4,000 in 2021.⁸ This was 0.87 percent of all vehicles registered in the state that year.

In 2021, New Hampshire increased access to EV charging ports throughout the state. There were 164 public ports with a total of 351 charging outlets,⁹ a 20.6 percent increase in the number of public charging outlets from the year before. Despite this improvement, the state still has significantly fewer public charging ports compared to neighboring states like Vermont and Maine, even though there are a higher number of EVs registered in New Hampshire.

Many New Hampshire school districts became interested in electric school buses as opportunities for funding became available. The Bipartisan Infrastructure Law authorized the Environmental Protection Agency to offer rebates to school districts to replace older buses with clean and zero-emission school buses, including the costs of installing charging infrastructure.¹⁰ Over twenty New Hampshire school districts applied for this program, and two were chosen from their lottery system to receive rebates for four and three electric school buses, respectively.¹¹

The program aims to reduce greenhouse gas emissions and air pollution, as well as attempt to balance loads on electric grids using vehicle-to-grid (V2G) technology as it continues to develop.¹² There are several pilot programs being run by school bus manufacturers, energy providers, as well as some states exploring V2G implementation. However, it will likely be several years before V2G technology is viable for widespread use, due to high start-up costs and limited data available on its efficiency,¹³ but V2G remains a promising new technology as EVs continue to develop.

– Casey Carter

STATION AND OUTLET COUNTS BY STATE

STATE	STATIONS	CHARGING OUTLETS
Connecticut	533	1,430
Maine	295	629
Massachusetts	2,175	4,871
New Hampshire	164	351
Rhode Island	255	628
Vermont	328	871

Source: U.S. Department of Energy, Alternative Fuels Data Center

7 Manchester-Boston Regional Airport. 2022. Amazon Begins Daily Cargo Service at Manchester-Boston Regional Airport. <https://www.flymanchester.com/news/amazon-begins-daily-cargo-service-at-manchester-boston-regional-airport/>

8 United States Department of Energy, Alternative Fuels Data Center. 2022. Electric Vehicle Registrations by State. <https://afdc.energy.gov/data/10962>

9 United States Department of Energy, Alternative Fuels Data Center. 2023. Alternative Fueling Station Counts by State. <https://afdc.energy.gov/stations/states>

10 This was not exclusive to electric school buses; the program also included alternative fuel vehicles like Propane buses and Compressed Natural Gas buses.

11 United States Environmental Protection Agency. 2023. School Bus Rebates: Clean School Bus Program. <https://www.epa.gov/cleanschoolbus/school-bus-rebates-clean-school-bus-program>

12 V2G technologies use bidirectional batteries, where energy goes in and out, that can store surplus energy and return it to the grid during peak usage times.

13 Massachusetts Department of Energy Resources, Vermont Energy Investment Corporation. 2018. Electric School Bus Pilot Project Evaluation. https://www.mass.gov/files/documents/2018/04/30/Mass%20DOER%20EV%20school%20bus%20pilot%20final%20report_.pdf

HIGHWAY TRAFFIC - ANNUAL TOTALS	2017	2018	2019	2020	2021
Average Annual Daily Traffic					
I-93 at Mass. State Line (Salem)	107,320	109,466	110,780	93,498	109,291
Annual percent change	0.6%	2.0%	1.2%	-15.6%	16.9%
I-95 at Mass. State Line (Seabrook)	97,907	98,783	100,908	80,619	95,378
Annual percent change	1.9%	0.9%	2.2%	-20.1%	18.3%

Source: New Hampshire Department of Transportation, ELMi analysis. Last Update 10/26/2022

LICENSES ISSUED & REGISTRATIONS	2017	2018	2019	2020	2021
Motor-Vehicle Registrations					
All Motor Vehicles	1,319,117	1,346,318	1,363,379	1,357,535	1,417,949
Automobiles	505,381	506,959	489,224	460,825	458,141
Buses	2,871	3,045	3,096	3,080	2,423
Trucks	732,067	757,353	791,892	814,942	872,359
Motorcycles	78,798	78,962	79,167	78,688	85,026
Licensed Drivers					
Male	1,103,624	1,161,665	1,195,211	1,060,381	1,174,826
Female	553,759	587,031	604,347	528,941	594,386
Age 19 and under	549,865	574,634	590,864	531,440	580,440
Age 65 and over	45,748	38,413	38,485	35,093	37,292
Age 65 and over	224,681	272,831	292,748	253,097	318,578

Source: Federal Highway Administration, Policy and Governmental Affairs, Office of Highway Policy Information. Last Update 2/28/2023

AIRCRAFT TRAVEL	2017	2018	2019	2020	2021
Manchester-Boston Regional Airport					
Total Passengers, Domestic and International Carriers	1,925,950	1,803,778	1,698,109	618,517	959,490
Annual Percent Change	-2.2%	-6.3%	-5.9%	-63.6%	55.1%
Enplanements	962,621	902,788	847,899	306,907	479,526
Annual Percent Change	-2.2%	-6.2%	-6.1%	-63.8%	56.2%
Deplanements	963,329	900,990	850,210	313,610	479,964
Annual Percent Change	-2.2%	-6.5%	-5.6%	-63.1%	53.0%
Air Cargo, Domestic and International Carriers (Tons) ^a	85,504	92,903	96,890	105,897	103,445
Annual Percent Change	-0.7%	8.7%	4.3%	9.3%	-2.3%

^a Does not include air mail

Source: Manchester-Boston Regional Airport, ELMi analysis. Last Update 10/26/2022

PORTSMOUTH HARBOR FREIGHT TRAFFIC	2017	2018	2019	2020	2021
Total (thousands of short tons)	2,353	2,627	2,869	2,631	2,737
Annual percent change	-15.6%	11.6%	9.2%	-8.3%	4.0%
Domestic	365	386	689	444	205
Annual percent change	-23.2%	5.7%	78.5%	-35.6%	-53.8%
Foreign Imports	1,959	2,241	2,179	2,187	2,532
Annual percent change	-15.1%	14.4%	-2.8%	0.4%	15.8%
Foreign Exports	29	1	0	33	9
Annual percent change	344.1%	-96.6%	-100.0%	n/a	-72.7%
<small>Source: US Army Corp of Engineers - Navigational Data Center, ELMI analysis. Last Update 10/26/2022</small>					
Prepared by: New Hampshire Employment Security, Economic and Labor Market Information Bureau					
www.nhes.nh.gov/elmi (603) 228-4124					

ENERGY

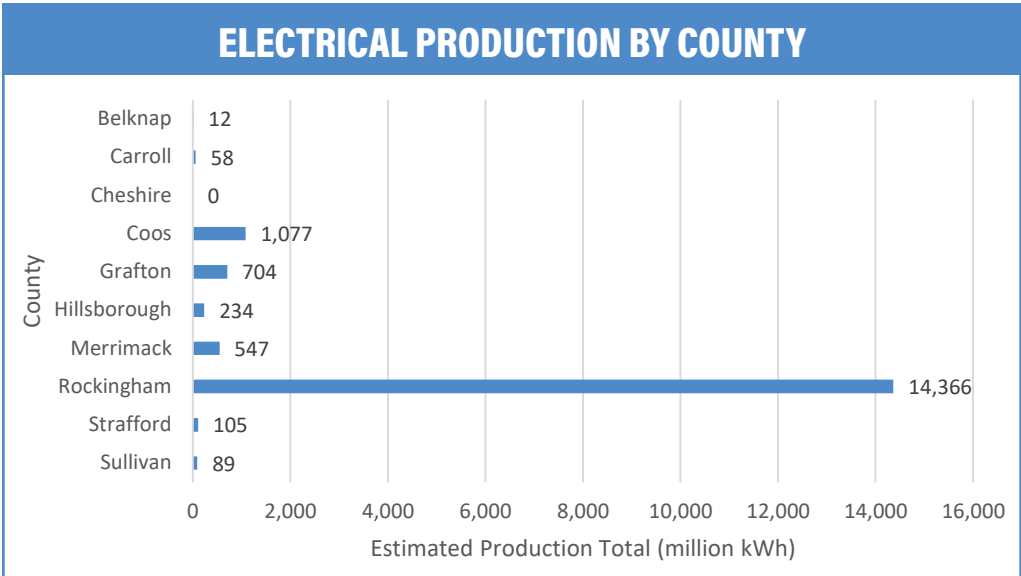
Electrical Production

Of the 17,193 million kWh total of electricity produced in New Hampshire in 2021, 83.6 percent was generated in Rockingham County. This 83.6 percent translates to 14,366 million kWh and was generated from 6 power plants: four natural gas, one petroleum, and one nuclear.¹ Furthermore, only four other counties produced greater than one percent of New Hampshire's total electricity: Coös, Grafton, Merrimack, and Hillsborough Counties.

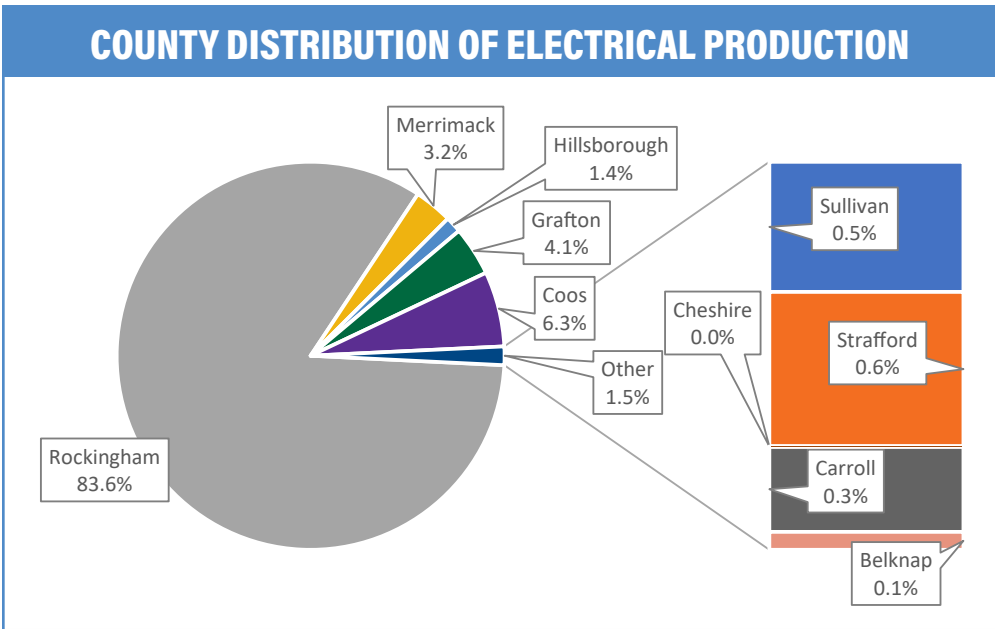
Following Rockingham County, Coös County had the second highest power generation at 1,077 million kWh, 6.3 percent of the total. 99.96 percent

of this generation was from renewable sources, primarily biomass, wind, and hydroelectric. This reliance on renewable energy extends to the entire state. Apart from Rockingham County, the majority of electricity generated was from renewable

sources. The production from these sources summing to 87.7 percent of the remaining generated electricity and 14.6 percent of the state's total generation in 2021.²



Source: U.S. Energy Information Administration, Electricity Data Browser



Source: U.S. Energy Information Administration, Electricity Data Browser

Electrical Consumption

Electricity consumption was correlated to county population, as well as commercial and industrial activity. Out of 10,867 million kWh consumed, three

1 U.S. Energy Information Administration, Electricity Data Browser Beta. <https://www.eia.gov/beta/electricity/data/browser>
 2 U.S. Energy Information Administration, Interactive GIS Data Viewer. <https://eia.maps.arcgis.com/>

counties consumed over 1,000 million kWh: Hillsborough, Rockingham, and Merrimack Counties.³ This consumption spiked in Hillsborough and Rockingham Counties, over double any other county, with 29.3 percent and 24.5 percent of the total electrical consumption. Grafton and Strafford Counties consumed seven percent and eight percent of the total. The

other counties consumed between two and five percent of total electricity.

Rockingham and Coös Counties were the only counties with a production surplus, totaling 439.6 percent and 335.2 percent of their electricity consumption, respectively. Grafton County had a 7.9 percent deficit while Merrimack County had a 55.7 percent deficit. Every other county had

a deficit of at least 70 percent of electricity consumed. Belknap and Hillsborough counties had deficits greater than 90 percent, while Cheshire County imported 100 percent of electricity consumed.

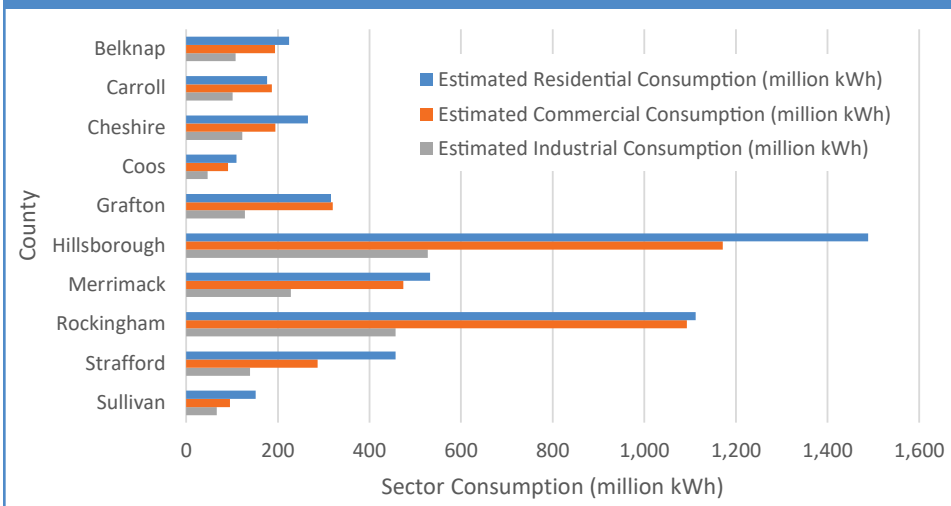
New Hampshire produced 17,193 million kWh of electricity in 2021, and consumed 10,867 million kWh, resulting in a production surplus of 6,326 million kWh. New Hampshire belongs to ISO New England, a

regional organization that operates the electricity transmission network in New England, as well as the market for buying and selling electricity. Electricity produced in New Hampshire is used throughout the region, depending on where it is needed.

Electrical Infrastructure

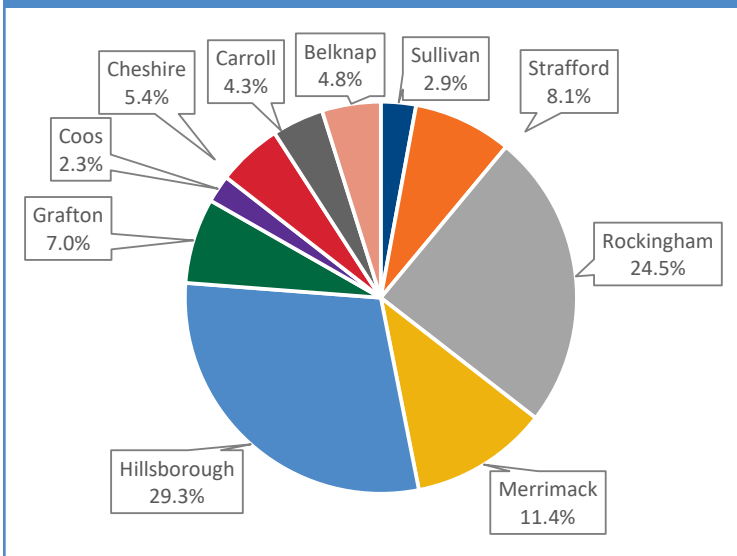
Highly concentrated electricity production is heavily reliant on long range transmission infrastructure, primarily high voltage lines and substations. All of Eversource's major construction projects planned for 2023 through 2025 involve the maintenance of their long range infrastructure.⁴ Liberty Utilities is

ESTIMATED SECTOR ELECTRICITY CONSUMPTION



Source: U.S. Energy Information Administration, Electricity Data Browser

COUNTY CONSUMPTION DISTRIBUTION



Source: U.S. Energy Information Administration, Electricity Data Browser

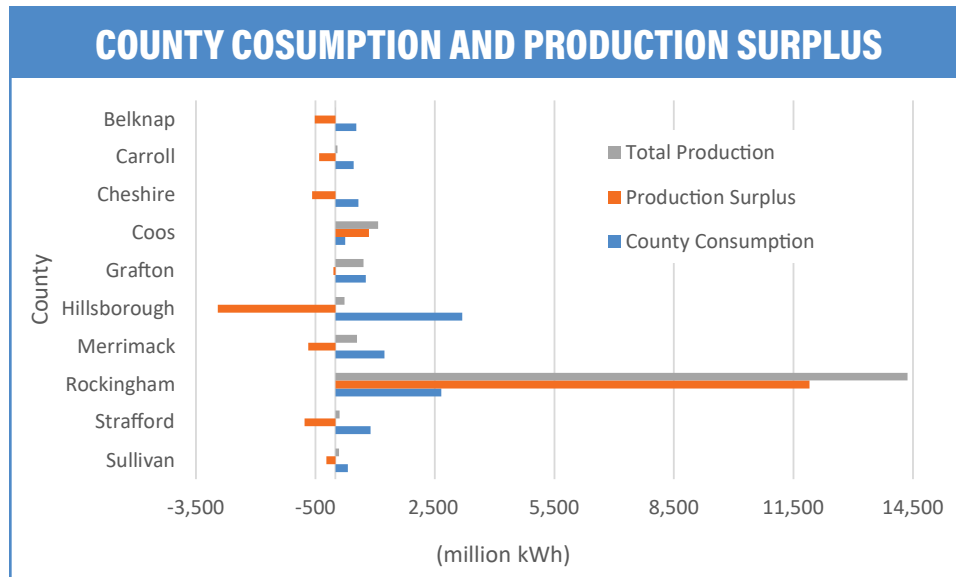
3 Commercial and industrial activity in each county were estimated based on commercial and industrial employment, according to 2021 Quarterly Census of Employment and Wages employment counts. Electricity consumption estimates assume that for each use (residential, commercial, and industrial), electricity costs are constant across geographies.

4 Eversource, Major New Hampshire Projects. <https://www.eversource.com/content/nh/residential/about/transmission-distribution/projects/new-hampshire-projects>

continuing their expansion of new infrastructure in Salem, replacing old equipment and increasing capacity to meet growing demand.⁵ These initiatives cite aging equipment as a primary reason for the construction, stressing the increasing need to continue to modernize New Hampshire’s electrical infrastructure.

As the U.S. transitions away from using fossil fuels to generate electricity, energy infrastructure will need to be modernized and upgraded. Renewable energy production facilities are often located in rural areas, and infrastructure will need to be developed to transmit power from these facilities to the rest of the grid.⁶

– Aaron Rockwood



Source: U.S. Energy Information Administration, Electricity Data Browser

⁵ Liberty Utilities, Salem Electric Enhancement Project. <https://new-hampshire.libertyutilities.com/acworth/residential/new-services/rockingham-substation.html>

⁶ Tim McLaughlin, "Creaky U.S. power grid threatens progress on renewables, EVs" *Reuters*, May 12, 2022. <https://www.reuters.com/investigates/special-report/usa-renewables-electric-grid/>

RETAIL SALES OF ELECTRICITY	2017	2018	2019	2020	2021
Sales to Ultimate Customers (million kWh)					
New Hampshire:					
Total	10,787	11,046	10,712	10,684	10,866
Percent change	-1.1%	2.4%	-3.0%	-0.3%	1.7%
Residential	4,441	4,641	4,507	4,790	4,834
Percent change	0.1%	4.5%	-2.9%	6.3%	0.9%
Commercial	4,390	4,443	4,281	4,030	4,106
Percent change	-1.7%	1.2%	-3.6%	-5.9%	1.9%
Industrial	1,956	1,963	1,924	1,873	1,926
Percent change	-2.2%	0.4%	-2.0%	-2.7%	2.8%
New England:					
Total	115,458	118,634	114,458	111,846	113,412
Percent change	-2.0%	2.8%	-3.5%	-2.3%	1.4%
Residential	45,849	48,099	46,173	48,328	48,703
Percent change	-1.5%	4.9%	-4.0%	4.7%	0.8%
Commercial	52,190	52,924	51,503	47,469	48,480
Percent change	-2.9%	1.4%	-2.7%	-7.8%	2.1%
Industrial	16,867	17,054	16,234	15,583	15,751
Percent change	-6.1%	1.1%	-4.8%	-4.0%	1.1%
Source: U.S. Energy Information Administration, ELMI Analysis. Last Update 10/24/2022					

ELECTRICITY GENERATED	2017	2018	2019	2020	2021
Net Electrical Energy Generated, New Hampshire (million kWh)	17,447	17,087	18,027	16,351	17,435
As percentage of energy purchased	161.7%	154.7%	168.3%	153.0%	160.5%

Energy by type (million kWh)					
Coal	287	660	343	128	284
Hydro	1,413	1,355	1,462	1,228	1,167
Natural Gas	3,580	2,992	3,583	3,638	4,466
Nuclear	9,991	10,062	10,907	9,865	9,856
Petroleum	105	178	30	42	72
Renewables	2,022	1,793	1,647	1,393	1,535
As percentage of total generated by type: ^a					
Coal	1.6%	3.9%	1.9%	0.8%	1.6%
Hydro	8.1%	7.9%	8.1%	7.5%	6.7%
Natural Gas	20.5%	17.5%	19.9%	22.2%	25.6%
Nuclear	57.3%	58.9%	60.5%	60.3%	56.5%
Petroleum	0.6%	1.0%	0.2%	0.3%	0.4%
Renewables	11.6%	10.5%	9.1%	8.5%	8.8%
^a Other energy sources, accounting for less than one percent of generation, include municipal solid waste, purchased steam, and miscellaneous technologies.					
Source: U.S. Energy Information Administration, ELMI Analysis. Last Update 10/24/2022					

ENERGY AND FUEL CONSUMPTION	2017	2018	2019	2020	2021
Energy Consumption					
Total consumption (trillion BTU)	317.8	325.7	319.8	295.5	
Annual percent change	3.4%	2.5%	-1.8%	-7.6%	
United States rank	46	46	46	46	
Types of energy consumption (percent of total)					
Residential	31.4%	32.9%	32.9%	34.2%	
Commercial	22.1%	22.4%	22.2%	22.1%	
Industrial	14.4%	12.9%	12.6%	13.4%	
Transportation	32.1%	31.7%	32.2%	30.3%	

Fuel Consumed to Generate Electricity (In equivalent barrels of oil)					
New Hampshire total (thousand barrels)	22,330,614	21,661,228	23,830,939	22,128,540	23,154,144
Oil	163	298	49	61	110
Coal	432	943	509	186	395
Gas	4,597,817	3,817,685	4,502,807	4,618,463	5,677,606
Nuclear	17,732,202	17,842,302	19,327,574	17,509,830	17,476,032
Source: U.S. Energy Information Administration, ELMI Analysis. Last Update 10/25/2022					
These data are made available every two years					

ENERGY EXPENDITURES AND PRICES	2017	2018	2019	2020	2021
Energy Expenditures Per Capita	3,841	4,310	4,075	3,354	
United States rank (including DC)	33	32	32	33	

Energy Prices (\$ per million BTU)	\$22.26	\$24.50	\$23.52	\$21.49	
United States rank (including DC) (1 = lowest)	47	47	45	45	

Petroleum prices (\$ per million BTU)	\$19.47	\$21.96	\$20.72	\$17.60	
United States rank (including DC) (1 = lowest)	38	36	34	33	

Electric prices (\$ per million BTU)	\$47.39	\$49.87	\$50.28	\$48.75	
United States rank (including DC) (1 = lowest)	46	46	46	45	

Source: U.S. Energy Information Administration, ELMI Analysis. Last Update 10/24/2022					
These data are made available every two years					
Prepared by: New Hampshire Employment Security, Economic and Labor Market Information Bureau					
www.nhes.nh.gov/elmi (603) 228-4124					



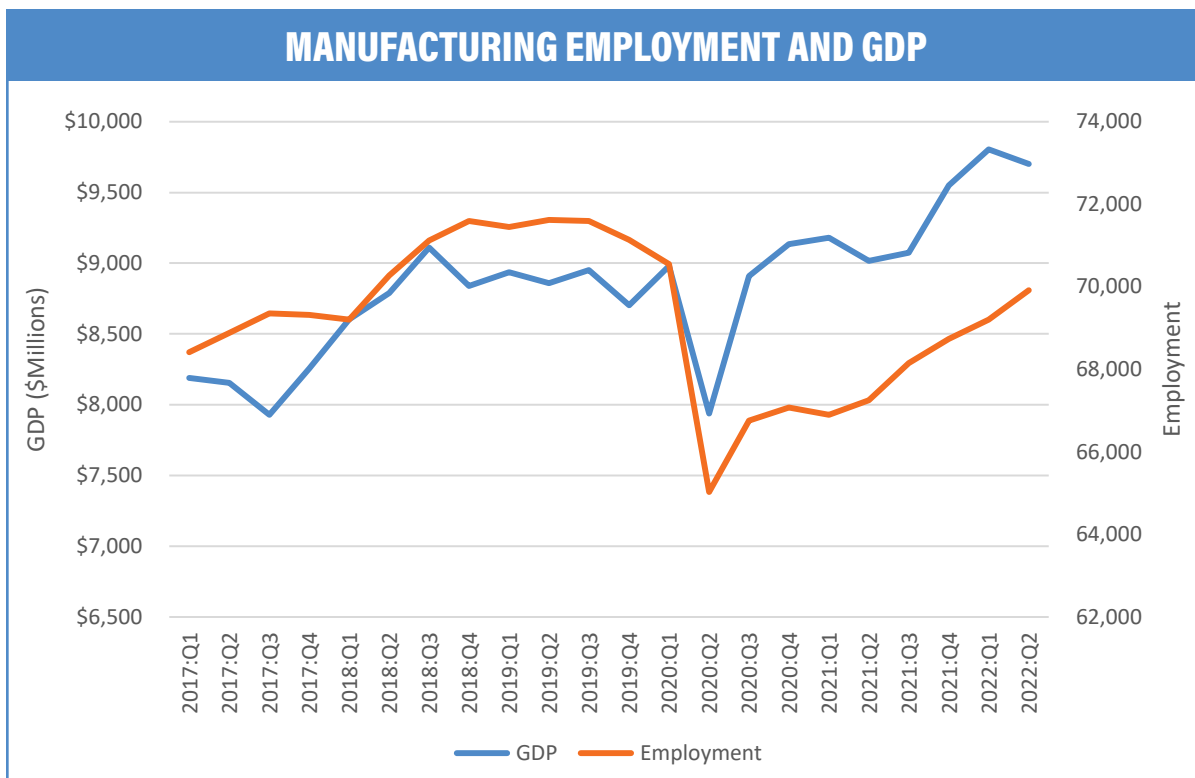
PRODUCTION

Manufacturing is the third largest industry sector in New Hampshire, accounting for 12.0 percent of private employment (67,850 workers) in 2021. Manufacturing employment grew steadily between 2014 and 2018, at an average rate of 1.3 percent per year, similar to the growth rate for total private employment. While average annual manufacturing employment increased 1.2 percent in 2019, employment fell slightly in the second half of 2019, declining by 500 jobs (1.2 percent) in the third and fourth quarters.

Manufacturing value added, the industry’s contribution to New Hampshire’s Gross Domestic Product (GDP), followed a similar trajectory. Manufacturing value added increased 0.3 percent in 2019, but declined 2.8 percent during the fourth quarter. Employment and GDP both declined in the second quarter of 2020, as the coronavirus pandemic began to affect New Hampshire. While GDP recovered quickly, returning to pre-pandemic levels one quarter later, employment recovery was much more gradual.

After adding 1,700 jobs (2.7 percent of manufacturing employment) in the third quarter of 2020, manufacturing employment remained flat, adding just 500 jobs (0.7 percent) over the next three quarters, and remained approximately 3,900 jobs (5.5 percent) below pre-pandemic employment. In contrast, GDP grew 13.6 percent over that period, and exceeded pre-pandemic value added by 3.6 percent (\$313 million). Manufacturing employment increased at a faster rate starting in the third quarter of 2021, adding 2,700 jobs by the second quarter of 2022. Still, manufacturing employment remained 1,200 jobs (1.7 percent) below pre-pandemic levels, while manufacturing GDP exceeded fourth quarter of 2019 levels by 11.5 percent (\$1 billion).

Manufacturing’s GDP growth in 2021 and 2022 is likely partially the result of inflation. Although GDP is adjusted to account for inflation, the prices of domestic manufactured goods have outpaced overall inflation since the beginning of 2021. The U.S. Bureau of Labor Statistics’



Source: New Hampshire Employment Security, Quarterly Census of Employment and Wages, U.S. Bureau of Economic Analysis, Gross Domestic Product

Producer Price Index (PPI), which measures the average change over time in prices received by domestic producers of goods and services, showed that prices for goods produced by the manufacturing industry increased 31.5 percent between January 2021 and June 2022. This was nearly twice the increase seen among all domestically produced goods and services (final demand), which increased 16.5 percent over that time.

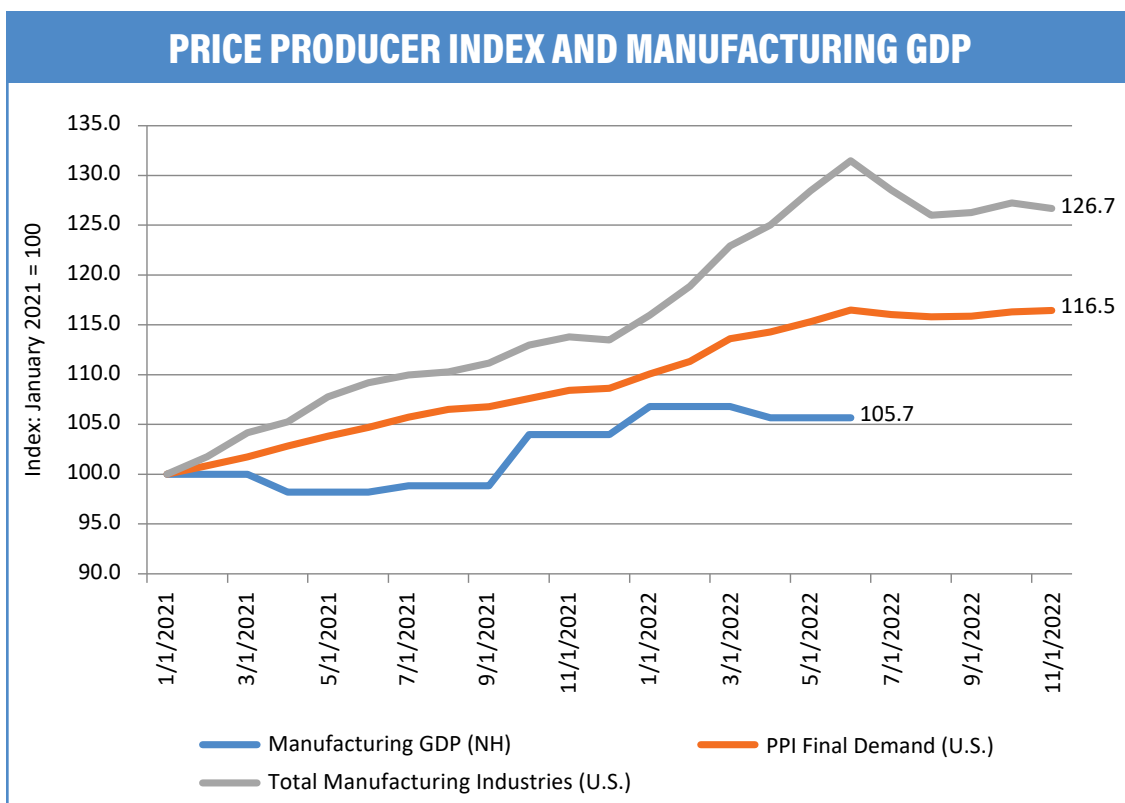
Supply chain issues, which have been widespread since the pandemic began, resulted in long delays, limited quantities and higher prices for some components and raw materials, slowing production and raising costs for many U.S. manufacturers. Increased fuel prices also increased transportation costs for shipping raw materials and finished products. These issues have contributed to increased manufacturing costs since the beginning of the pandemic.

In addition to supply constraints, U.S. consumers shifted their spending habits during the pandemic. With many in-person activities

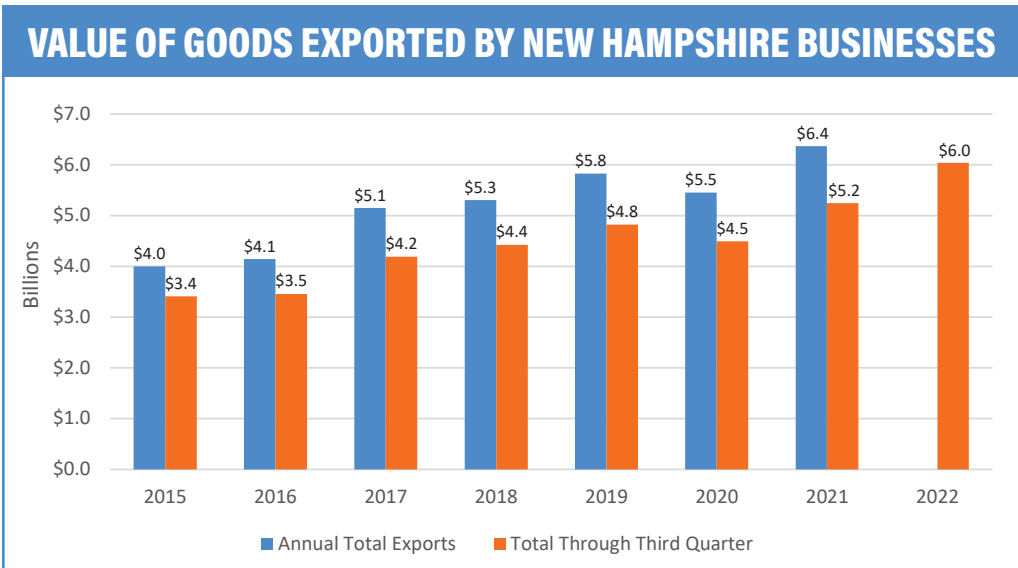
limited during the early months of the pandemic, demand for services fell, while demand for goods increased. Low supply of goods, along with high demand, put upward pressure on prices. This pressure has allowed manufacturers to increase profit margins; corporate profit estimates from the U.S. Bureau of Economic Analysis indicate that manufacturers' profits increased 70 percent from the first half of 2019 to the first half of 2022.

Exports

The coronavirus pandemic caused exports from New Hampshire-based businesses to decline from \$5.8 billion in 2019 to \$5.4 billion in 2020, before increasing to 6.4 billion in 2021. Apart from 2020's pandemic-related decline, exports from New Hampshire-based businesses have grown rapidly in recent years, increasing from \$4.1 billion in 2016 to \$6.4 billion in 2021, a 54 percent increase. Exports are likely to increase again in 2022; through the third quarter, New Hampshire-based businesses exported goods worth \$6.0 billion, a 15 percent increase over the \$5.2 billion exported through the first three quarters of 2021.



Source: U.S. Bureau of Labor Statistics, Producer Price Index, U.S. Bureau of Economic Analysis, Gross Domestic Product



Source: U.S. Department of Commerce, International Trade Administration

of transportation equipment during the first three quarters of 2022 totaled \$1.4 billion, more than the value of transportation equipment exports from all of 2021.

While a relatively small category of exports, beverages and tobacco products experienced rapid growth in 2021 and 2022. In 2020,

Computer and electronic products was the largest category of goods exported from New Hampshire, accounting for \$2.0 billion, nearly one-third of goods exported in 2021. Computer and electronic products have been the largest category of exported goods in each of the last ten years, with the exception of 2019, when transportation equipment was the largest category of exported goods.

Transportation equipment exports have been one of the largest factors contributing to New Hampshire’s overall growth in exported goods. As recently as 2015, New Hampshire-based businesses exported less than \$200 million worth of transportation equipment. Transportation equipment exports have increased substantially since then, and exports have exceeded one billion dollars in every year since 2019. Exports

New Hampshire-based businesses exported \$1.3 million worth of beverages and tobacco products. This increased to \$16 million in 2021, and \$18 million over the first three quarters of 2022. Beverage and tobacco were primarily exported to two countries: Canada, which received goods worth \$9 million through the first nine months of 2022, and Chile, which received goods worth \$15 million in 2021 and \$9 million through the first nine months of 2022. In early 2022, the Chilean Ministry of Agriculture removed a regulation requiring testing for alcoholic beverages imported from the U.S.; removal of this regulation is likely the reason for the increase in beverage exports to Chile.¹

– Greg David

¹ U.S. Department of Agriculture, Chile Facilitates Imports of US Beer. [https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Chile Facilitates Imports of US Beer_Santiago_Chile_CI2022-0007.pdf](https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=Chile%20Facilitates%20Imports%20of%20US%20Beer_Santiago_Chile_CI2022-0007.pdf)



Source: U.S. Department of Commerce, International Trade Administration



GROSS DOMESTIC PRODUCT BY STATE - NEW HAMPSHIRE	2017	2018	2019	2020	2021
Current Dollars (\$ millions)	\$80,598	\$83,870	\$87,338	\$88,338	\$99,673
Annual percent change	1.9%	4.1%	4.1%	1.1%	12.8%
Real chained 2012 dollars (\$ millions)	\$73,973	\$75,433	\$76,819	\$75,928	\$82,986
Annual percent change	0.5%	2.0%	1.8%	-1.2%	9.3%

Gross Domestic Product by State - United States					
Current Dollars (\$ millions)	\$19,477,337	\$20,533,058	\$21,380,976	\$21,060,474	\$23,315,081
Annual percent change	4.2%	5.4%	4.1%	-1.5%	10.7%
Real chained 2012 dollars (\$ millions)	\$18,076,651	\$18,609,078	\$19,036,052	\$18,509,143	\$19,609,812
Annual percent change	2.2%	2.9%	2.3%	-2.8%	5.9%

Source: Bureau of Economic Analysis, ELMI Analysis. Last Update 10/26/2022

TOTAL CAPITAL EXPENDITURES (new and used)	2017	2018	2019	2020	2021
Total (\$ millions)	\$565	\$570	\$564	\$636	\$703
As a Percent of Payroll					
United States	25.1%	25.9%	25.2%	24.0%	23.9%
New Hampshire	14.6%	14.0%	13.8%	15.8%	16.1%
Connecticut	14.2%	12.4%	13.2%	15.8%	14.8%
Maine	20.5%	24.7%	40.0%	19.5%	18.4%
Massachusetts	13.6%	14.6%	14.5%	14.6%	15.6%
Rhode Island	14.2%	19.7%	15.6%	17.7%	17.2%
Vermont	14.8%	17.9%	12.6%	13.8%	12.4%

Source: Annual Survey of Manufactures & Economic Census, US Census Bureau. ELMI Analysis. Last Update 12/20/2022

Value Added	2017	2018	2019	2020	2021
Value Added by Manufacture					
Total (\$ millions)	\$10,046.0	\$10,683.0	\$10,830.4	\$10,582.4	\$11,803.1

Value Added per Payroll Dollar					
United States	\$3.67	\$3.76	\$3.64	\$3.39	\$3.83
New Hampshire	\$2.59	\$2.63	\$2.64	\$2.63	\$2.70
United States rank ^a	49	50	48	49	49
Connecticut	\$2.82	\$3.16	\$3.26	\$2.83	\$3.18
United States rank ^a	47	42	36	46	40
Maine	\$3.10	\$3.14	\$3.08	\$3.13	\$3.24
United States rank ^a	43	44	40	36	37
Massachusetts	\$2.88	\$2.97	\$2.85	\$2.70	\$2.94
United States rank ^a	46	47	44	47	47
Rhode Island	\$2.72	\$2.85	\$2.83	\$2.80	\$2.85
United States rank ^a	48	49	45	46	48
Vermont	\$2.55	\$3.12	\$2.81	\$2.60	\$2.61
United States rank ^a	50	45	46	50	50

^a Including D.C.

Source: Annual Survey of Manufactures & Economic Census, US Census Bureau. ELMI Analysis. Last Update 12/20/2022

EXPORT SALES TO THE WORLD	2017	2018	2019	2020	2021
Total (\$ millions)	\$5,148	\$5,306	\$5,827	\$5,456	\$6,366
Annual percent change	24.2%	3.1%	9.8%	-6.4%	16.7%

Industry Share of Total Exports ^b					
Computer and Electronic Products	31.7%	26.4%	23.2%	27.6%	30.8%
Transportation Equipment	11.9%	18.5%	25.6%	20.2%	20.9%
Machinery, Except Electrical	13.0%	15.2%	13.9%	13.4%	13.0%
Chemicals	8.7%	10.1%	10.6%	11.4%	9.2%
Fabricated Metal Products, NESOI	5.0%	6.5%	4.6%	6.6%	4.6%
Electrical Equipment, Appliances & Components	11.5%	5.4%	6.1%	4.5%	4.5%
Miscellaneous Manufactured Commodities	3.1%	3.2%	3.0%	3.2%	3.3%
Plastics & Rubber Products	2.4%	2.5%	2.2%	2.5%	2.7%
Waste and Scrap	1.8%	1.9%	1.8%	2.3%	1.8%
Food Manufactures	1.5%	1.4%	1.0%	1.1%	1.4%
Printed Matter and Related Products, NESOI	2.0%	1.4%	1.3%	1.1%	1.4%
Nonmetallic Mineral Products	1.0%	0.9%	0.8%	0.9%	0.8%

^b International Trade Administration, U.S. Department of Commerce, Trade Stats Express™ Home, National Trade Data Home

Source: International Trade Administration, U.S. Department of Commerce, ELMI Analysis. Last Update 10/26/2022

Prepared by: New Hampshire Employment Security, Economic and Labor Market Information Bureau

www.nhes.nh.gov/elmi | (603) 228-4124



TRADE & TOURISM

Retail Trade Employment

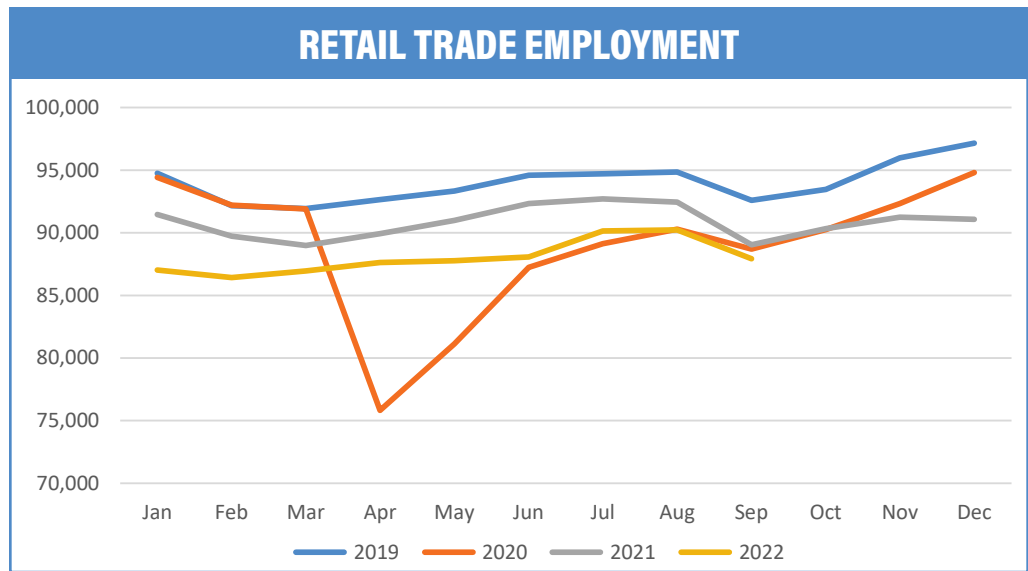
Retail trade employment in New Hampshire reached its peak in 2016, averaging 95,920 workers. Employment declined gradually over the next three years, falling to 94,020 workers in 2019, a loss of 1,900 workers (2.0 percent).

The coronavirus pandemic accelerated

this decline, with employment falling to 88,760 in 2020, a loss of 5,300 workers (5.6 percent). Average employment in 2021 increased by 2,100 workers (2.4 percent), but declined in the fourth quarter. There were 1,600 fewer retail trade workers in the fourth quarter of 2021 than in the fourth quarter of 2020. Retail employment continued to decline in 2022, declining by 2,000 workers (2.1 percent) over-the-year. In contrast, total

private employment in New Hampshire increased 3.6 percent between the third quarter of 2021 and the third quarter of 2022.

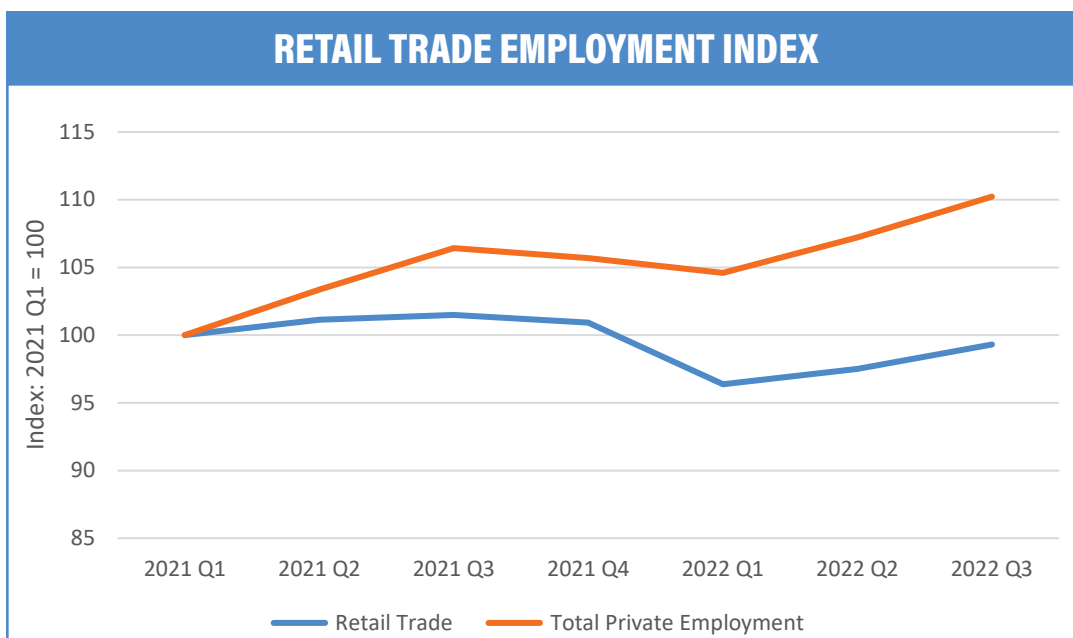
Retail employment declined as consumers transitioned from in-person shopping to online retail, a trend that accelerated during the pandemic. Automation has also allowed retail businesses to provide more services with fewer employees. New Hampshire Employment Security's



Source: New Hampshire Employment Security, Quarterly Census of Employment and Wages

10

RETAIL TRADE EMPLOYMENT INDEX



Source: New Hampshire Employment Security, Quarterly Census of Employment and Wages

Long-Term Industry Projections expect that the downward trend that started in 2017 will continue, with projected 2030 retail trade employment 3.0 percent lower than 2020 employment.¹

The North American Industry Classification System (NAICS) is used by the United States, Canada and Mexico to classify economic activity by industry. NAICS codes are reviewed and revised every five years to keep the classification system current with changes in economic activities. Starting with the first quarter of 2022, industry data were published using new coding. One of the most substantial changes to the coding structure was in the retail trade industry. With the prevalence of internet usage and generic methods of delivery for goods and services, establishments classified in two retail trade industry groups, direct selling establishments and electronic shopping and mail-order houses, were updated to eliminate the distinction between physical stores and online stores, and instead, classify establishments by broad product lines.²

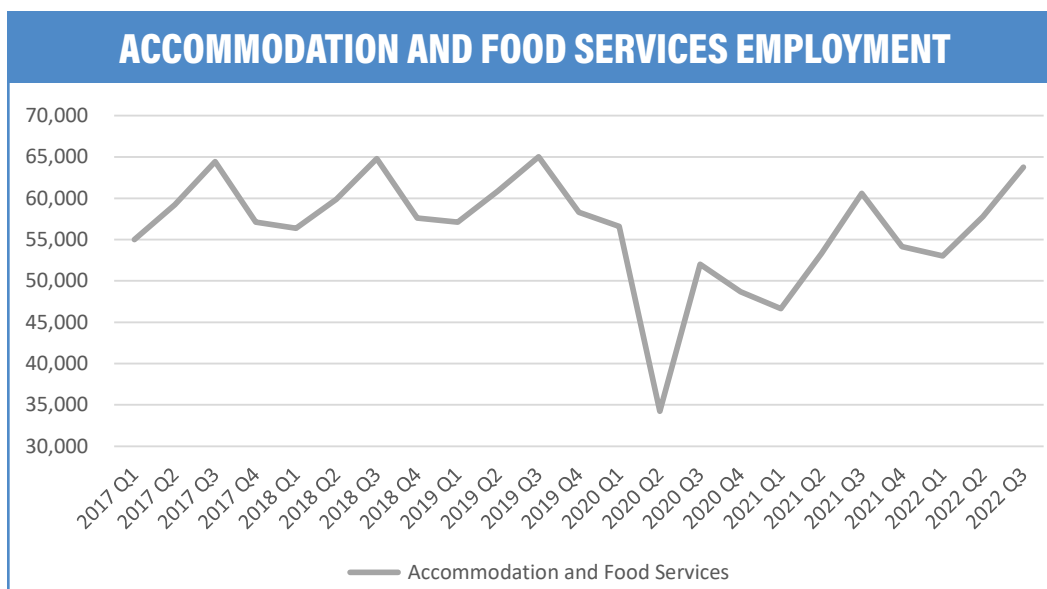
Accommodation and Food Services

Accommodation and food services employment increased from 59,950 workers in 2017 to 60,360 in 2019. Accommodation and food

services was one of the industry sectors most affected by the coronavirus pandemic; while total private employment fell 6.5 percent in 2020, employment in accommodation and food services declined 20.8 percent, a loss of 12,600 workers. Employment increased by 5,900 workers in 2021, although it remained 11.0 percent (6,700 workers) below 2019 employment. Employment growth continued through the first two quarters of 2022; employment in the third quarter was 2.0 percent (1,200 workers) below employment in the third quarter of 2019.³

While accommodation and food services employment increased prior to the pandemic, employment in the accommodation subsector declined slightly, decreasing by 130 workers (1.3 percent) between 2017 and 2019. Accommodation employment declined further than food services and drinking places employment during the pandemic, with employment declining 55 percent over-the-year in the second quarter of 2020. Employment in the food services and drinking place subsector declined 42 percent over the same period.

By the third quarter of 2022, accommodation employment was 5.6 percent (660 workers)



Source: New Hampshire Employment Security, Quarterly Census of Employment and Wages

1 Projections use a different methodology for employment estimates and are not directly comparable to other estimates.
 2 U.S. Bureau of Labor Statistics, 2022 North American Industry Classification System (NAICS) Revision, <https://www.bls.gov/respondents/ars/2022-naics.htm>
 3 Accommodation and food services employment has a seasonal employment pattern, so over-the-year comparisons are most appropriate.
 4 Because employment in accommodation and food services is highly seasonal, employment should be compared over-the-year.



below employment in the third quarter of 2019.⁴ Employment in food services and drinking places was 1.1 percent (590 workers) below third quarter of 2019 employment. Based on 2020 to 2030 long-term industry projections, food services and drinking places employment is expected to surpass pre-pandemic employment by 2030. Estimated 2018 food services and drinking places employment was 50,100 workers; 2030 employment is projected to be 51,100 workers.⁵ While accommodation regained nearly all workers lost during the pandemic by the third quarter of 2022, the long-term trend is less favorable. Accommodation employment is projected to be 7,900 workers in 2030, well below estimated 2018 employment of 9,900 workers.

Tourism

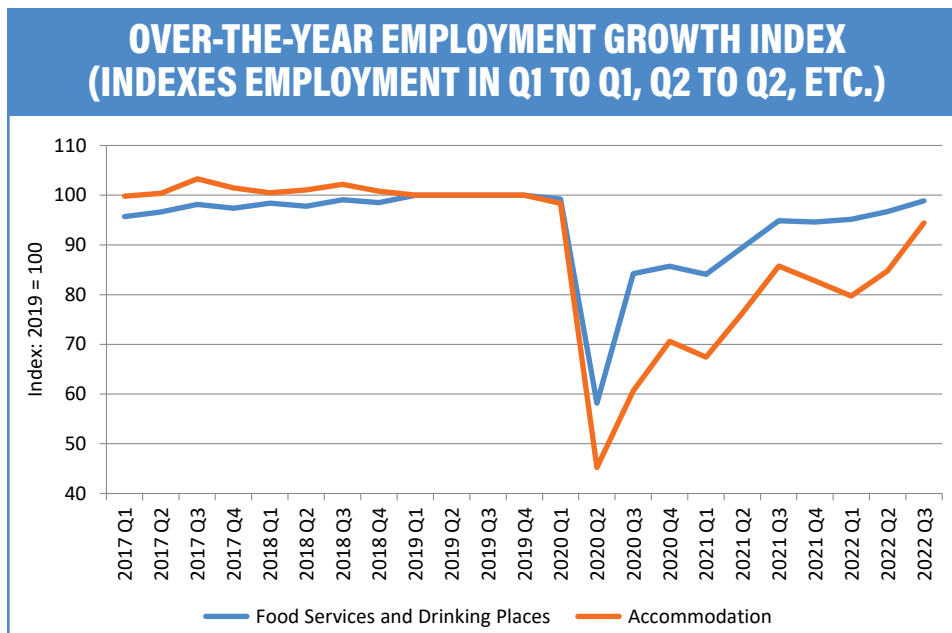
Tourism is a major driver of economic activity in New Hampshire, bringing millions of visitors to the state every year. Tourism-related spending increased from \$5.5 billion in 2017 to \$5.9 billion in 2019. Although the number of visitors to New Hampshire increased 0.7 percent during

the first year of the pandemic, the average trip was shorter and spending per trip decreased. As a result, total tourist spending declined to \$4.6 billion, a 21.6 percent decline.

Tourism-related spending recovered quickly, reaching \$6.3 billion in 2021, an eight percent increase over 2019 levels. While the average trip remained slightly shorter than pre-pandemic (2.8 nights per trip, compared to 3.0 in 2019), the number of visitor trips increased from 11.5 million in 2020 to 13.9 in 2021, a 20 percent increase. Per-night spending, which fell from \$136 per night in 2019 to \$110 in 2020, increased to \$133 per night in 2021.

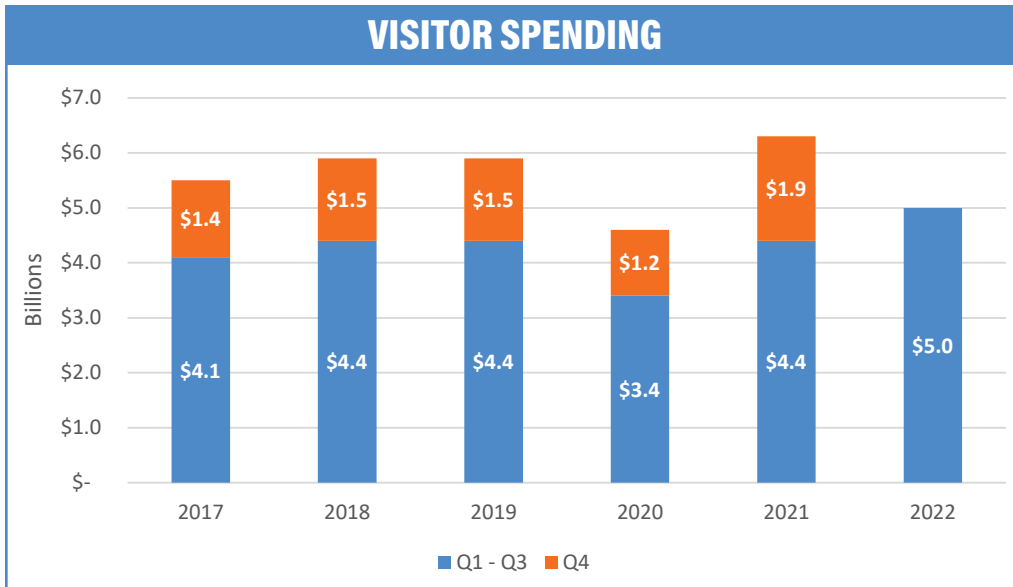
Through the first three quarters of 2022, tourism was on pace to surpass 2021 levels. While the number of trips was 0.1 percent lower than over the first three quarters of 2021, trips were slightly longer, and per-night spending increased. Tourism-related spending over the first three quarters of the year was \$5.0 billion, 14 percent above spending through the first three quarters of 2021.

– Greg David

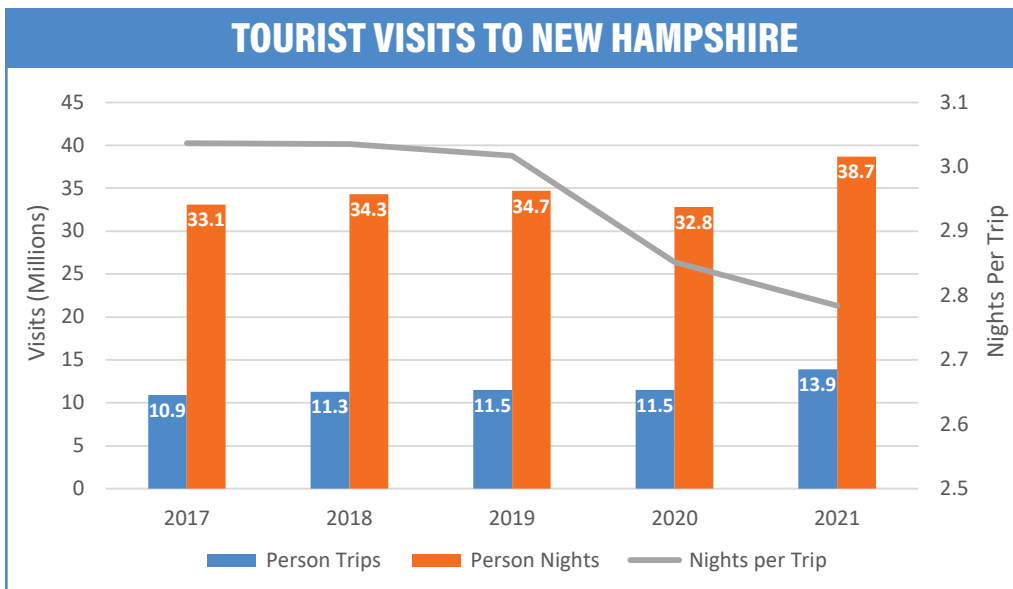


Source: New Hampshire Employment Security, Quarterly Census of Employment and Wages

⁵ Projections use a different methodology for employment estimates and are not directly comparable to other estimates.



Source: New Hampshire Division of Travel and Tourism, Dean Runyan Associates, TravelStats



Source: New Hampshire Division of Travel and Tourism, Dean Runyan Associates, TravelStats

RETAIL EMPLOYMENT	2017	2018	2019	2020	2021
Food and beverage stores	22,037	21,729	22,173	22,418	21,904
Annual percent change	0.1%	-1.4%	2.0%	1.1%	-2.3%
General merchandise stores	15,151	14,691	14,157	13,369	13,967
Annual percent change	-0.9%	-3.0%	-3.6%	-5.6%	4.5%
Furniture and home furnishings stores	2,574	2,673	2,707	2,444	2,763
Annual percent change	0.9%	3.8%	1.3%	-9.7%	13.1%
Electronics and appliance stores	3,265	3,064	2,943	2,756	2,695
Annual percent change	-4.7%	-6.2%	-3.9%	-6.4%	-2.2%
Building material & garden supply stores	9,430	9,673	9,691	10,252	10,538
Annual percent change	0.4%	2.6%	0.2%	5.8%	2.8%
Health and personal care stores	4,301	4,242	4,155	3,786	3,894
Annual percent change	-1.5%	-1.4%	-2.1%	-8.9%	2.9%
Motor vehicle & parts dealers	12,456	12,590	12,702	11,506	11,695
Annual percent change	-0.7%	1.1%	0.9%	-9.4%	1.6%
Gasoline stations	4,465	4,442	4,496	4,278	4,250
Annual percent change	0.6%	-0.5%	1.2%	-4.8%	-0.7%
Clothing and clothing accessories stores	6,419	6,115	5,794	4,205	4,502
Annual percent change	-2.0%	-4.7%	-5.2%	-27.4%	7.1%
Nonstore retailers	5,512	5,584	5,878	6,085	6,169
Annual percent change	3.3%	1.3%	5.3%	3.5%	1.4%
Sporting Goods, Hobby, Book, and Music Stores	4,387	4,173	3,947	3,245	3,615
Annual percent change	-1.5%	-4.9%	-5.4%	-17.8%	11.4%
Miscellaneous Store Retailers	5,491	5,463	5,378	4,414	4,914
Annual percent change	-1.2%	-0.5%	-1.6%	-17.9%	11.3%
New Hampshire total	95,470	94,410	94,021	88,760	90,906
Annual percent change	-0.5%	-1.1%	-0.4%	-5.6%	2.4%
New England total	801,938	796,211	786,371	721,564	749,581
Annual percent change	-0.3%	-0.7%	-1.2%	-8.2%	3.9%
United States total	15,854,454	15,791,102	15,602,881	14,758,276	15,342,135
Annual percent change	0.2%	-0.4%	-1.2%	-5.4%	4.0%

Source: U.S. Bureau of Labor Statistics, ELMI Analysis. Last Update 1/20/2023

ACCOMMODATION AND FOOD SERVICES EMPLOYMENT	2017	2018	2019	2020	2021
Accommodation	9,537	9,527	9,411	6,328	7,423
Annual percent change	0.6%	-0.1%	-1.2%	-32.8%	17.3%
Food Services and Drinking Places	49,414	50,149	50,950	41,461	46,281
Annual percent change	1.5%	1.5%	1.6%	-18.6%	11.6%
New Hampshire total	58,951	59,676	60,362	47,788	53,704
Annual percent change	1.4%	1.2%	1.1%	-20.8%	12.4%
New England	635,732	643,282	650,353	473,459	537,232
Annual percent change	1.8%	1.2%	1.1%	-27.2%	13.5%
United States total	13,606,761	13,834,194	14,030,794	11,072,658	12,156,766
Annual percent change	2.2%	1.7%	1.4%	-21.1%	9.8%

Source: U.S. Bureau of Labor Statistics, ELMI Analysis. Last Update 1/20/2023

HOSPITALITY: ESTIMATED SALES (\$ millions)	2017	2018	2019	2020	2021
Meals	\$3,093.9	\$3,256.7	\$3,384.6	\$2,774.0	\$3,595.4
Annual percent change	3.7%	5.3%	3.9%	-18.0%	29.6%
Rentals (Includes Motor Vehicle Rentals)	\$636.0	\$695.3	\$711.8	\$517.6	\$805.5
Annual percent change	6.3%	9.3%	2.4%	-27.3%	55.6%

Source: New Hampshire Office of Strategic Initiatives, ELMI Analysis. Last Update 1/20/2023

LIQUOR SALES (State Fiscal Year - July 1 to June 30)	2016-17	2017-18	2018-19	2019-20	2020-21
Retail & Wholesale Gross Sales (\$ millions)	\$702.7	\$712.4	\$729.1	\$765.6	\$801.1
Fiscal year percent change	3.0%	1.4%	2.3%	5.0%	4.6%
Retail & Wholesale Net Sales ^a (\$ millions)	\$684.8	\$691.9	\$706.1	\$739.6	\$786.4
Fiscal year percent change	3.0%	1.4%	2.3%	5.0%	4.6%
Gross Profit From Sales (\$ millions)	\$200.0	\$200.8	\$208.0	\$206.6	\$230.8
Fiscal year percent change	2.6%	0.4%	3.6%	-0.7%	11.7%

^a Total sales less discounts and fees

Source: New Hampshire Liquor Commission, ELMI Analysis. Last Update 1/20/2023

HUNTING AND FISHING	2017	2018	2019	2020	2021
Hunting Licenses, Tags, Permits and Stamps					
Resident	45,893	45,590	45,644	49,742	
Non-resident	10,108	9,972	10,631	10,887	
Moose Hunt Lottery					
Applications	8,261	6,142	7,108	7,217	7,419
Permits Drawn	51	51	49	49	40
Fishing Licenses, Tags, Permits and Stamps					
Resident	105,872	106,242	108,060	135,521	
Non-resident	50,128	50,239	51,639	55,513	

Source: New Hampshire Department of Fish and Game. Last Update 1/20/2023

OUTDOOR RECREATION VALUE ADDED (\$ thousands)	2017	2018	2019	2020	2021
Total Outdoor Recreation Value Added	\$2,508,934	\$2,507,805	\$2,610,566	\$2,261,709	\$2,663,745
Total Core Outdoor Recreation	\$1,465,654	\$1,480,896	\$1,506,740	\$1,467,983	\$1,615,214
Multi-use Apparel and Accessories ^b	\$325,379	\$320,330	\$324,898	\$262,019	\$308,143
Hunting/Shooting/Trapping	\$194,043	\$184,725	\$171,657	\$228,965	\$264,942
Snow Activities	\$199,246	\$204,609	\$208,403	\$183,659	\$191,583
Boating/Fishing	\$133,722	\$138,293	\$146,947	\$199,576	\$158,931
Supporting Outdoor Recreation	\$1,043,280	\$1,026,909	\$1,103,826	\$793,726	\$1,048,531
Travel and Tourism ^c	\$703,424	\$699,973	\$757,146	\$472,887	\$693,826
^b Consists of backpacks, bug spray, coolers, general outdoor clothing, GPS equipment, hydration equipment, lighting, sports racks, sunscreen, watches, and other miscellaneous gear and equipment.					
^c Travel and tourism expenses includes only expenses for travel at least 50 miles away from home.					
Source: U.S. Bureau of Economic Analysis. Last Update 1/20/2023					

TRAVEL AND TOURISM ^d	2017	2018	2019	2020	2021
All Visitor Spending (\$ billions)	\$5.5	\$5.9	\$5.9	\$4.6	\$6.3
Annual percent change	3.0%	6.1%	0.4%	-21.6%	37.8%
Overnight Visitor Volume (Millions of Person Trips)	10.9	11.3	11.5	11.5	13.9
Annual percent change	2.4%	4.1%	0.9%	0.7%	20.4%
Average Overnight Spending: Per Person Night	\$132.1	\$136.6	\$135.7	\$110.0	\$132.5
Annual percent change	2.0%	3.4%	-0.7%	-18.9%	20.4%
^d Includes both resident and non-resident spending and volume					
Source: New Hampshire Department of Business and Economic Affairs. Last Update 1/20/2023					

VISITOR SPENDING BY TYPE OF ACCOMODATION (\$ millions)	2017	2018	2019	2020	2021
Hotel, Motel	\$3,100.3	\$3,337.9	\$3,341.7	\$2,406.7	\$3,790.7
Day Travel	\$861.9	\$903.8	\$904.8	\$768.0	\$880.1
Private Home	\$803.2	\$830.4	\$827.8	\$740.9	\$983.1
Vacation Home	\$259.7	\$264.0	\$264.8	\$226.1	\$305.9
Campground	\$211.9	\$246.0	\$264.0	\$269.7	\$234.6
Source: New Hampshire Department of Business and Economic Affairs. Last Update 1/20/2023					
Prepared by: New Hampshire Employment Security, Economic and Labor Market Information Bureau					
www.nhes.nh.gov/elmi (603) 228-4124					

CONSTRUCTION & HOUSING

Real Estate and Housing Markets

The New Hampshire housing market has been a frequent topic of discussion over the last two years. In 2020, lockdowns, fear of contagion, and business and educational services utilizing remote work options created high demand for housing in New Hampshire. The state's reputation for outdoor recreational opportunities, lack of personal income tax, and a lower-cost standard of living than east coast urban areas made New Hampshire a popular place for those looking for a more rural setting to temporarily or permanently relocate.

As a result, the supply of housing inventory in 2020 dropped to one month for single family homes and 1.2 months for condominiums. The situation worsened in 2021, with less than one month housing inventory for both single family homes and condos. Inventory rebounded slightly in 2022, up to a 1.3 months supply of housing for single family homes and a 1.2 months supply for condos. In contrast, a balanced real estate market usually has five to six months of inventory.¹

Low real estate inventory has driven prices upward. Although there was a slight increase in inventory in 2022, the median sales price has

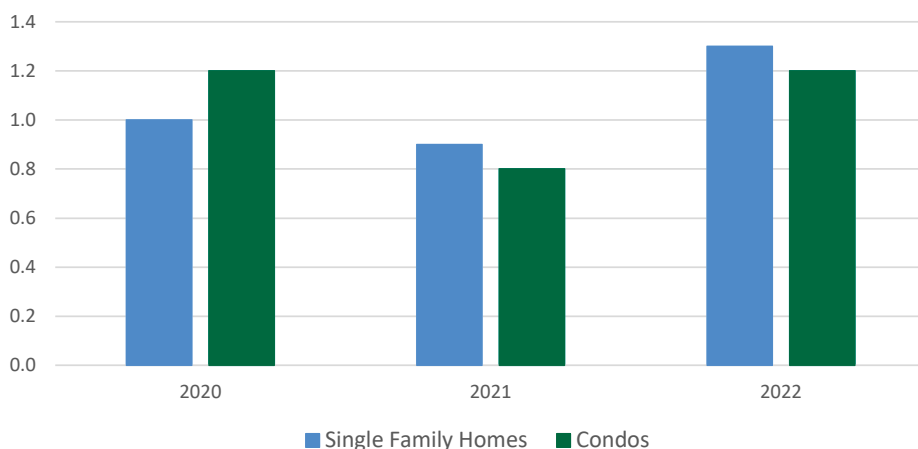
continued to rise statewide and in every county. Statewide, the median home sales price in 2022 was \$405,000, 12.5 percent higher than the 2021 median. Rockingham County had the highest median home sales price in 2022, \$575,000, a 15.0 percent increase over 2021, while Coös County had the lowest, \$199,000, a 5.8 increase over 2021. In Grafton County, the median sales price of \$360,000 was below the statewide average, but the median price increase of 16.1 percent from 2021 to 2022 was the largest percent increase among the counties. The median home sales price in Strafford County's median sales price was \$400,000, a 4.1 percent increase over 2021, the smallest increase among the counties.

Days on Market Until Sale

The National Association of Realtors (NAR) defines days on market until sale as the number of days from the date on which the property is listed for sale on the local brokers' multiple-listing services (MLS) to the date when the seller has signed a contract for the sale of the property.² Generally, low average days on market is favorable to the seller, and high average days on market is favorable to the buyer. High average days on market can also indicate a weakening real estate market.

The New England Real Estate Network/NHAR have compiled average days on market data since 1998, when the average was 146 days, the longest days on market in available data. During the financial crisis of 2008, average days on market peaked at 133 days, and stayed over 100 days through 2013. Since then, average days on market

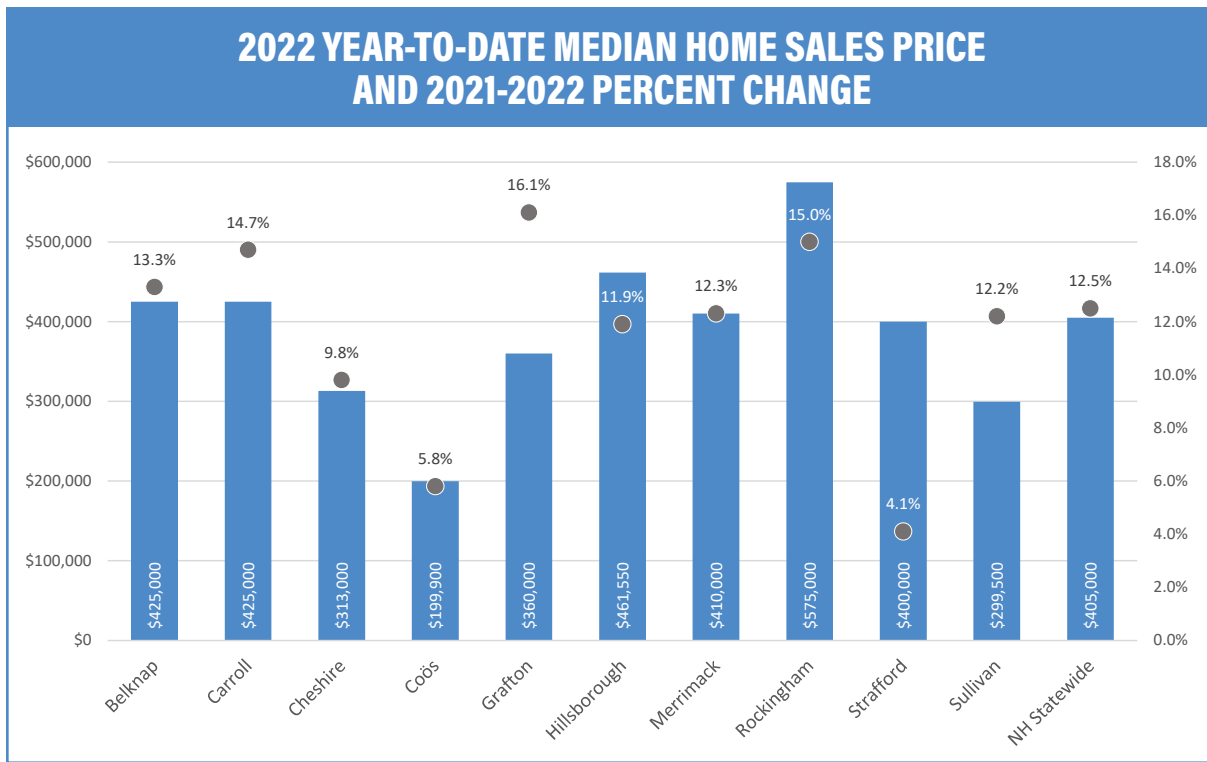
NH STATEWIDE MONTHS SUPPLY OF HOUSING INVENTORY



Source: NH Realtors Local Market Update December 2022

¹ Housing supply squeeze finally begins to ease, Bankrate LLC, <https://www.bankrate.com/real-estate/inventory-on-the-rise/>

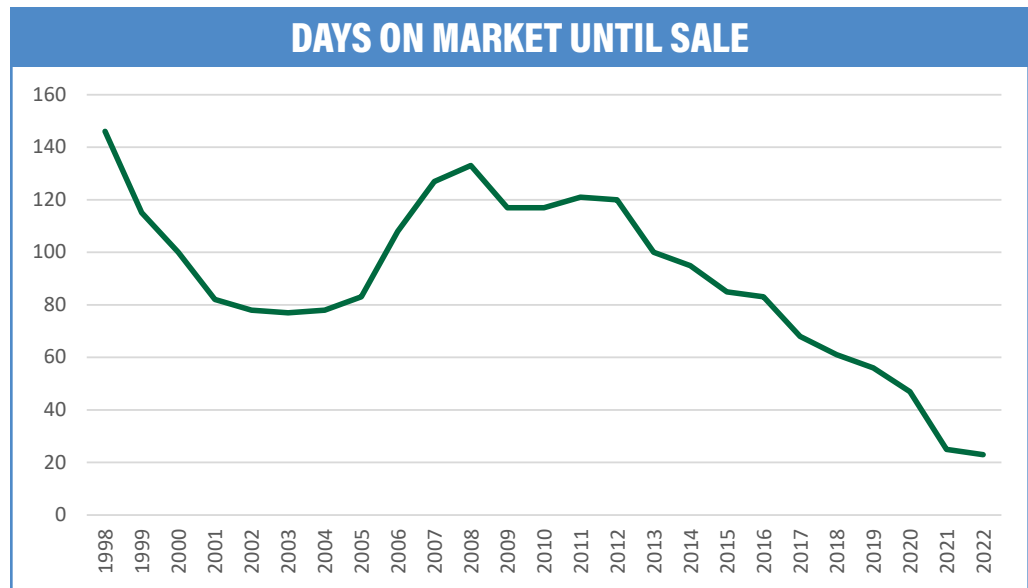
² "Days on market: what they are, why they matter," Opendoor Brokerage Inc., <https://www.opendoor.com/articles/why-days-on-market-matter>



Source: NH Realtors Local Market Update December 2022

have steadily decreased, with the largest decrease occurring between 2020 and 2021, when average days on market plummeted from 47 days to 25 days, a 47 percent decline. In 2022, average days on market for New Hampshire statewide was 23 days.

At the county level in 2022, days on market in Hillsborough, Strafford, and Rockingham Counties were below the statewide average at 17 days, 20 days, and 21 days, respectively. Merrimack County matched the statewide average of 23 days. Average days on market for Cheshire County was 26 days, while Belknap County (27 days), Grafton County (28 days), Carroll County (29 days) fell close behind. Days on market was 31 days for Sullivan County, and 40 days for Coös County.

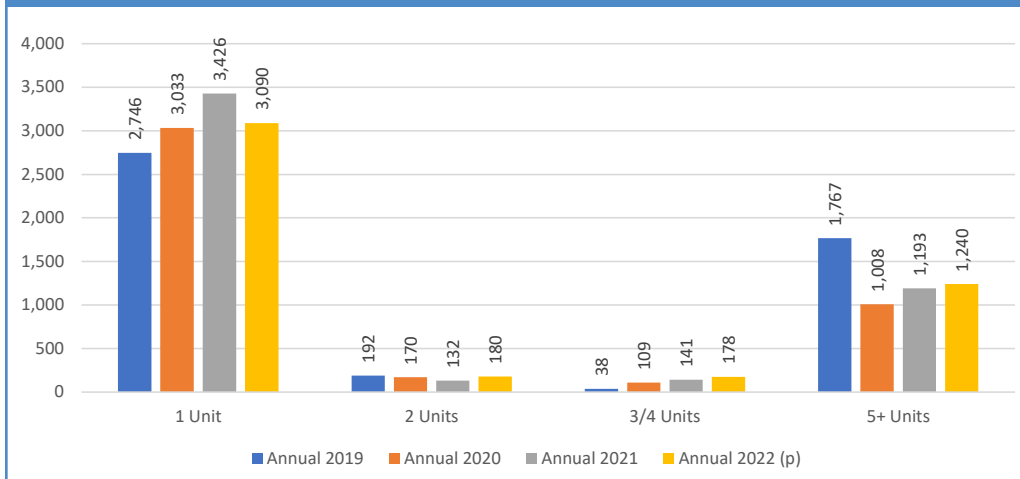


Source: New England Real Estate Network/NHAR

Building Permits

The U.S. Census Bureau conducts a monthly survey of housing units authorized by permit. While this is not a measure of the start or completion of housing construction, it does provide a comparable measure of housing expected to be constructed. Data for 2022 year-to-date showed a total of 4,685 housing units were authorized in New Hampshire by a permitting authority (usually a municipality).

NEW PRIVATELY OWNED HOUSING UNITS AUTHORIZED IN NH IN 2022 BY NUMBER OF UNITS IN STRUCTURE



Source: US Census Bureau, Building Permits Survey

Of the 4,685 housing units authorized, 66 percent were one-unit structures, 25 percent were housing units in multiple unit structures of at least five units, four percent were for housing units in multiple unit structures of two units, and four percent were for structures of three to four units each. The permits authorized for structures with five or more units, a total of 1,240 units, were planned for 59 different structures.

For the first time in the last four years, the number of housing units authorized in New Hampshire declined over-the-year, falling 4.2 percent from 2021 to 2022. Permits for one-unit structures fell by 9.8 percent, and permits for structures with two units grew by 36.4 percent. Permits for structures with three or four units rose by 26.2 percent, and permits for structures with five or more units rose 3.9 percent.

Road and Transportation Construction Projects

I-93 Exit 4A

The Exit 4A project involves construction of a new interchange on I-93 in Londonderry, about a mile north of Exit 4. The new interchange will provide

access to the east side of I-93 via a new connector road in Derry. The project goals are to reduce congestion and improve safety along NH Route 102 and to promote economic vitality in the Derry/Londonderry area.³

Planning the addition of Exit 4A to I-93 actually began in the mid-1980s, with approval by the Federal Highway

Administration (FHWA). Nearly forty years later, after numerous municipal and public meetings, scope and plan changes, environmental impact statements (EIS), and funding shortages, the project was added to the State's Transportation Improvement Plan for 2017-2026. A final environmental impact statement was completed in February 2020, and in April 2021, the NH Executive Council approved an engineering contract. A formal groundbreaking ceremony was held in August 2022, and completion of the entire project is projected for the end of 2026.

Red Listed Bridges

The New Hampshire Department of Transportation manages 3,857 bridges throughout the state, ranging from bridges on interstates, turnpike and divided highways to bridges for pedestrians, bicyclists, and other recreational users.⁴

New Hampshire law⁵ requires that a list of bridges found to be structurally deficient upon inspection known as red list bridges be maintained by the New Hampshire Department of Transportation. Red list bridges are those structurally deficient bridges with one or more major elements in poor or worse condition. As of the beginning of 2022,

3 Derry-Londonderry 13065, I-93 Exit 4A, NH Department of Transportation, Project Specific Information <https://www.i93exit4a.com/>

4 2021 State-Owned Red List Bridges (Includes Turnpike Bureau and NHDES Bridges), State of New Hampshire, Department of Transportation, <https://www.nh.gov/dot/org/projectdevelopment/bridgedesign/documents/bridge-state-red-list.pdf>

5 NH Laws and Rules, NH RSA XX 243:25-a, 25-b, <https://www.gencourt.state.nh.us/rsa/html/NHTOC/NHTOC-XX-234.htm>

there were 114 state-owned (including turnpikes) red listed bridges. In addition, there were 222 red listed bridges owned by municipalities, railroads, or private owners.

Repair and rehabilitation of bridges is a constant activity. In 2021, while 10 state-owned bridges were removed from the red list, another six were added. Maintenance of municipal and other bridges is just as challenging. In 2021, while 17 bridges were removed from the red list, 16 were added.⁶ Altogether, 8.7 percent of New Hampshire bridges are on the red list.

The Federal Infrastructure Investment and Jobs Act, signed on November 15, 2021, authorizes \$110 billion for roads, bridges, and major projects across the nation, including \$40 billion of new funding for bridge repair, replacement, and rehabilitation.⁷ New Hampshire is expected to receive about \$1.51 billion in state formula funding for roads, bridges, and transit.⁸

Electric Vehicle Charging Infrastructure

Another program with designated funding support from the Federal Infrastructure Investment

and Jobs Act is the National Electric Vehicle Infrastructure program (NEVI). The spending bill authorized \$5 billion over five years (\$1 billion per year) in formula funding for development of NEVI nationwide. The estimated allocation for New Hampshire is over \$17 million across the five years; the funding is permitted to cover up to 80 percent of project costs.⁹

The New Hampshire Department of Transportation has developed a plan to use NEVI funds for direct current fast charging (DCFC) stations along the state's Alternative Fuel Corridors (AFCs) beginning with the interstate routes I-93, I-95, and I-89; and state routes NH-9, NH-12, NH 101, NH 9/US 202 from I-89 to Keene, NH 11, US 4/NH 9, NH 16, US 302, and US 2. The goal of the plan is to start by building NEVI-compliant EV charging stations on the interstate system, connecting New Hampshire with its bordering states and Canada, then follow up with additional AFCs, build in redundancy at stations, and ensure all charging stations are NEVI compliant.¹⁰

– Katrina Evans

6 2021 State-Owned Red List Bridges, <https://www.nh.gov/dot/org/projectdevelopment/bridgedesign/documents/bridge-state-red-list.pdf>

7 The White House, Updated Fact Sheet: Bipartisan Infrastructure Investment and Jobs Act, August 22, 2021 <https://www.whitehouse.gov/briefing-room/statements-releases/2021/08/02/updated-fact-sheet-bipartisan-infrastructure-investment-and-jobs-act/>

8 Pappas Applauds Enactment of Bipartisan Infrastructure Investment and Jobs Act, NH Congressman Chris Pappas Press Release, <https://pappas.house.gov/media/press-releases/pappas-applauds-enactment-bipartisan-infrastructure-investment-and-jobs-act>

9 5-Year National Electric Vehicle Infrastructure Funding by State, US Department of Transportation, Federal Highway Administration, Bipartisan Infrastructure Law – Electric Vehicles https://www.fhwa.dot.gov/bipartisan-infrastructure-law/evs_5year_nevi_funding_by_state.cfm

10 State Plan for Electric Vehicle Infrastructure Deployment, NH Department of Transportation, August 1, 2022 <https://www.nh.gov/dot/media/documents/nh-nevi-charging-deployment-plan-2022-08-01.pdf>

CONTRACT VALUE INDICES (base = 1980) December (not seasonally adjusted)	2017	2018	2019	2020	2021
Total construction					
New Hampshire	350.0	317.0	282.5	362.5	340.5
New England	423.3	447.6	493.6	459.5	518.3
United States	444.4	415.2	498.2	537.9	574.1
Nonbuilding construction					
New Hampshire	450.1	207.3	290.2	501.3	503.4
New England	533.0	426.2	308.0	234.2	493.0
United States	555.4	434.5	477.7	549.3	489.9
Nonresidential construction					
New Hampshire	536.1	680.2	359.1	214.8	230.1
New England	454.2	588.2	670.6	689.0	535.1
United States	413.0	431.2	525.2	468.4	531.1
Residential construction					
New Hampshire	201.3	159.2	235.8	385.8	332.3
New England	339.2	340.2	442.3	384.9	517.6
United States	414.3	392.2	486.3	589.6	652.3
Residential construction (seasonally adjusted)					
New Hampshire	282.9	233.0	345.3	553.8	466.9
New England	371.9	366.9	481.2	414.3	544.4
United States	467.1	440.4	539.1	644.7	707.0

Source: Federal Reserve Bank of Boston, ELMi Analysis. Last Update 12/21/2022

HOUSING PERMITS AUTHORIZED (not seasonally adjusted)	2017	2018	2019	2020	2021
Total New Hampshire	3,625	4,445	4,743	4,320	4,892
Annual percent change	-4.5%	22.6%	6.7%	-8.9%	13.2%
Total New England	33,160	34,375	35,923	35,571	39,637
Annual percent change	1.7%	3.7%	4.5%	-1.0%	11.4%
Total United States	1,281,977	1,328,827	1,386,048	1,471,141	1,736,982
Annual percent change	6.2%	3.7%	4.3%	6.1%	18.1%

Single Family Units, New Hampshire	2,711	2,710	2,746	3,033	3,426
Annual percent change	1.2%	0.0%	1.3%	10.5%	13.0%
Single Family Units, New England	18,016	18,159	16,883	18,609	21,230
Annual percent change	0.5%	0.8%	-7.0%	10.2%	14.1%
Single Family Units, United States	819,976	855,332	862,084	979,360	1,115,360
Annual percent change	6.2%	3.7%	4.3%	6.1%	18.1%

Source: US Census Bureau, ELMi Analysis. Last Update 12/21/2022

HOME SALES	2017	2018	2019	2020	2021
Freddie Mac House Price Index (December 2000 = 100), NSA					
New Hampshire	159.18	167.97	178.08	203.36	240.81
United States	178.49	187.57	195.62	217.77	256.57

Mortgage Rates and Housing Rentals					
30-Year Fixed Mortgage Rates (Annual average)	3.99%	4.54%	3.94%	3.11%	2.96%

Source: Freddie Mac. Last Update 12/21/2022

UNITS IN STRUCTURE	2017	2018	2019	2020	2021
Total housing units	634,689	638,112	642,298	646,849	643,979
1-unit, detached	407,329	403,645	400,650	448,840*	412,356
1-unit, attached	35,476	33,543	31,288		36,696
2 units	33,034	34,508	34,554	36,125	34,575
3 or 4 units	36,650	35,243	34,732	31,354	33,431
5 to 9 units	28,110	29,293	34,088	67,889*	29,585
10 to 19 units	17,695	18,634	22,681		19,143
20 or more units	44,853	44,019	47,881	37,819*	48,129
Mobile home	31,123	39,053	36,269		29,780
Boat, RV, van, etc.	419	174	155		284

Source: 1-year American Community Survey, US Census Bureau. Last Update 12/21/2022

*Due to data collection issues, the 2020 1-year ACS data were released as experimental data. Experimental tables contained fewer categories than standard ACS tables.

HOMES FINANCED BY NH HOUSING FINANCE AUTHORITY	2017	2018	2019	2020	2021
Total	1,418	1,428	1,238	1,105	1,336
Percent new construction	0.6%	0.8%	0.7%	0.8%	0.6%
Percent condo	13.5%	14.6%	13.7%	12.2%	12.8%

NHHFA Bond Issues (\$ millions)	15.6	11.4	10.6	21.0	29.4
---------------------------------	------	------	------	------	------

Assisted Rental Housing Funded					
Total units (NHHFA only)	792	335	278	254	718
For elderly and supportive housing tenants	178	218	36	71	55

Housing Unit Rentals					
Median gross monthly rent, (including utilities), all units	\$1,143	\$1,177	\$1,251	\$1,283	\$1,373
Annual percent change	2.7%	3.0%	6.3%	2.6%	7.0%
Rental Unit Vacancy Rate, all units	1.7%	2.1%	0.8%	1.8%	0.9%

Source: New Hampshire Housing Finance Authority. Last Update 1/30/2023

NEW HAMPSHIRE MULTIPLE LISTING SERVICE DATA ON SALES OF EXISTING HOMES ^a	2017	2018	2019	2020	2021
Regional Sales and Price Activity - December to December					
Median sale price					
Single Family - residential	\$266,000	\$283,000	\$300,000	\$335,000	\$395,000
Condominium	\$192,000	\$205,000	\$215,000	\$250,000	\$288,530
Percent change in Price from Prior Year					
Single Family - residential	6.5%	6.4%	6.0%	11.7%	17.9%
Condominium	3.8%	6.8%	4.9%	16.3%	15.4%
Total Units Sold - 12-Month Average					
Single Family - residential	1,482	1,463	1,468	1,537	1,455
Condominium	405	406	404	421	442

^a Copyright 2012 Northern New England Real Estate Network, Inc. The reproduction of these statistics is done with the permission of NNEREN. The statistics referenced herein are based solely upon listings submitted to the multiple listing service database of NNEREN and do not include all properties sold and marketed for sale. ALL INFORMATION DEEMED RELIABLE BUT NOT GUARANTEED. Any analysis or commentary related to these statistics is that of the commentator, and not that of NNEREN.

Source: Northern New England Real Estate Network. Last Update 12/21/2022

Prepared by: New Hampshire Employment Security, Economic and Labor Market Information Bureau

www.nhes.nh.gov/elmi | (603) 228-4124

EDUCATION

Employment Projections for the Educational Services Sector

Employment in educational services (both private and public educational services) is projected to increase 6.8 percent from 2020 to 2030. Much of this increase was likely due to projections base year values being lower than normal because of jobs lost during the pandemic. Projected 2030 educational services employment was just 842 jobs higher than estimated 2018 employment.

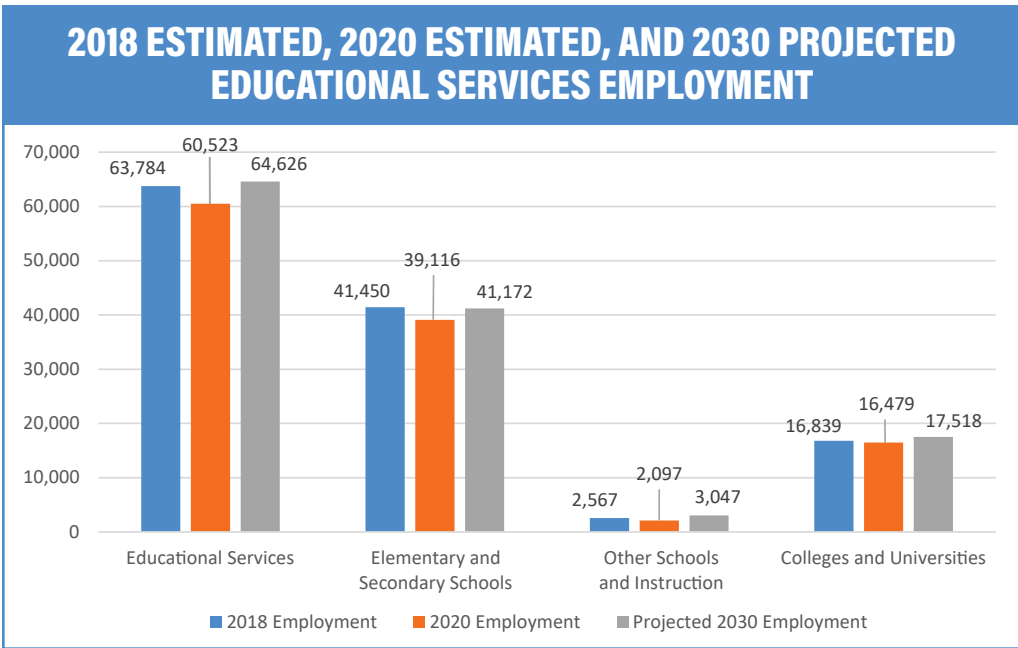
Employment in elementary and secondary schools, which accounts for almost two-thirds of the educational services sector, is projected to grow 5.3 percent from 2020 to 2030, but 2030 employment is expected to reach a level slightly below 2018 estimated employment. The decline in educational services employment is largely the result of demographic changes in New Hampshire’s population. Although it increased slightly in 2021, the state’s population under age 18 has trended downwards for more than 20 years; school enrollments have declined as a result, and fewer students require fewer teachers and other school employees.

Employment in other industry groups within the educational services sector is projected to grow beyond pre-pandemic estimated employment. Employment in colleges and universities is projected to increase 4.3 percent from 2020 to 2030, and expected to exceed the 2018 estimate by 680 jobs, while technical and trade schools employment is projected to grow 8.5 percent from 2020 to 2030, an increase of 100 jobs over the 2018 estimated employment.

Employment in the other schools and instruction industry group is projected to increase 45.3 percent from 2020 to 2030, the largest ten-year percent change among educational industry groups, with projected 2030 employment surpassing the 2018 employment estimate by 480 jobs. Other schools and instruction includes sports and recreation instruction, exam preparation and tutoring, fine arts schools, and all other non-school instruction. Although projections are not available for individual industries within this industry group, national industry staffing pattern

data identifies several occupations projected for growth within this industry group, which provides insight into the industries likely to see growth.¹

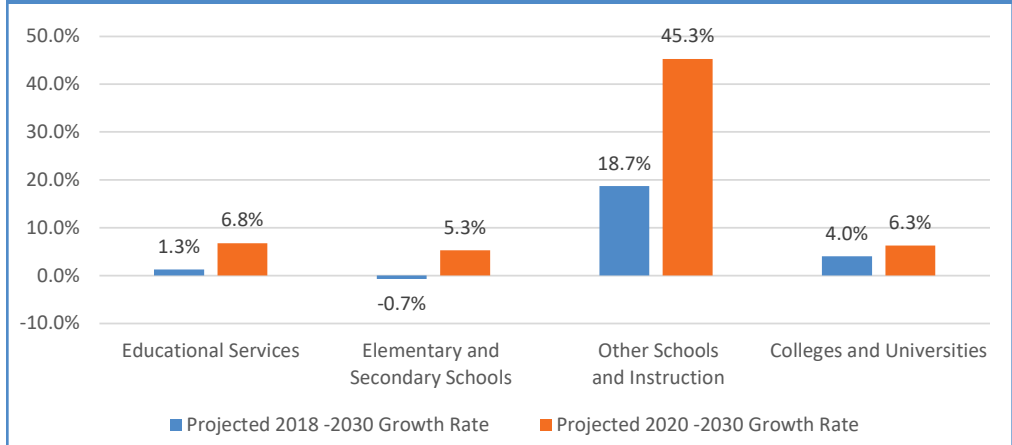
Within other schools and instruction, nationwide employment of coaches and scouts and exercise trainers and group fitness instructors were projected to increase more than 40 percent



Source: New Hampshire Employment Security, Long-term Employment Projections

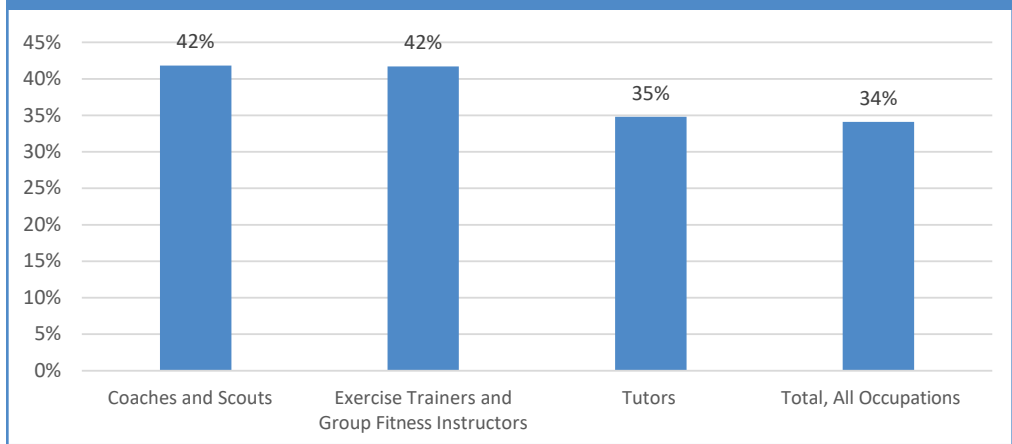
¹ Staffing patterns are based on 2021 - 2031 long-term U.S. employment projections.

PROJECTED 2030 EMPLOYMENT, COMPARED TO PRE-PANDEMIC AND PANDEMIC ERA EMPLOYMENT



Source: New Hampshire Employment Security, Long-term Employment Projections

2021 - 2031 PROJECTED PERCENT CHANGE FOR OCCUPATIONS IN OTHER SCHOOLS AND INSTRUCTION INDUSTRY GROUP (U.S.)



Source: U.S. Bureau of Labor Statistics, Employment Projections

between 2021 and 2031, suggesting that sports and recreation instruction was one of the industries responsible for projected growth. The number of workers employed as tutors was expected for increase 35 percent between 2021 and 2031, suggesting that exam preparation and tutoring employment was also projected to increase substantially as well.

Pandemic-Era Shifts in Enrollment Trends

Total elementary and secondary school enrollment in New Hampshire has declined steadily as the state ages and birth rates decline. New Hampshire's

population age 5 to 18 declined annually from 2010 to 2019. The decline in school enrollment accelerated during the 2020-2021 school year, the first full school year during the pandemic. Enrollment fell from 194,950 students during the 2019-2020 school year to 190,310 during 2020-2021 school year, a 2.4 percent decline.

Public school enrollment fell further, declining 4.7 percent, while enrollment in non-public schools and homeschool increased. Homeschool enrollment more than doubled, from 2,955 to 6,110. While homeschool enrollment declined in the 2021-2022 and 2022-2023 school

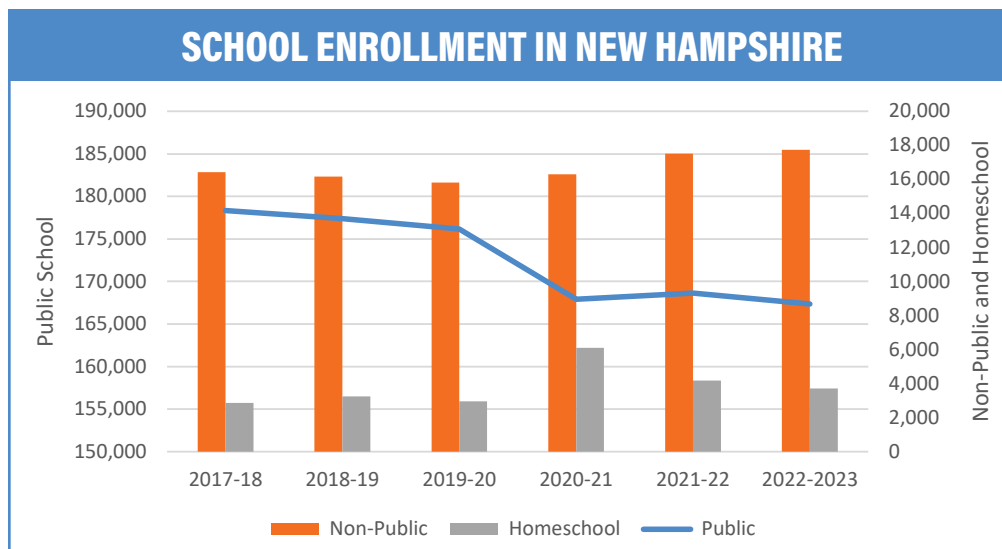
years, it remained 26 percent above 2019-2020 levels. Non-public school enrollment increased each year since the start of the pandemic, with 2022-2023 enrollment 12 percent (1,900 students) higher than 2019-2020 enrollment.

Education Freedom Accounts, first introduced in 2021, contributed to increased enrollment in non-public schools. This program allows state funded per-pupil education adequacy grants (New Hampshire's contribution to each student's education funding) for moderate and low-income students to pay for non-public school expenses. For the 2022-2023 school year, approximately 400 students (just over one quarter of students newly-

enrolled in Education Freedom Accounts) had attended a public school in the previous school year.²

NAEP Test Scores

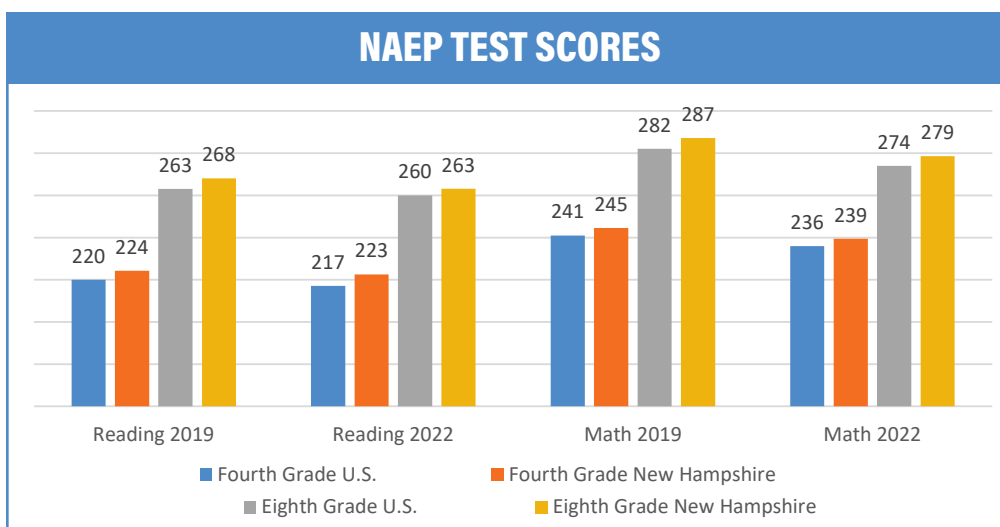
The National Assessment of Educational Progress, a standardized test administered to fourth and eighth grade students, was administered in spring 2022 for the first time since the pandemic. The test assesses student performance in reading and math. Nationwide, 2022 reading and math scores declined for both fourth and eighth grader students, an indication of the struggles the education system faced during the coronavirus pandemic. Math scores declined five points for fourth grade students, and eight points for eighth grade students, while reading scores declined three points for both grades.³



Source: New Hampshire Department of Education

Scores declined in New Hampshire as well, particularly at the eighth-grade level. Math scores declined five points for fourth graders and nine points for eighth graders, while reading scores declined by two points for fourth grades and five points for eighth graders. New Hampshire was one of just four states that tested above the national average in both subjects for both grades.

- Greg David



Source: National Assessment of Educational Progress

2 New Hampshire Department of Education, "Second year of Education Freedom Accounts prospering," September 9, 2022. <https://www.education.nh.gov/news/second-year-education-freedom-accounts-prospering>.
 3 New Hampshire Department of Education, NAEP releases student achievement results. <https://www.education.nh.gov/news/naep-releases-student-achievement-results>.

FALL ENROLLMENTS, NEW HAMPSHIRE PUBLIC AND PRIVATE SCHOOLS	2017-18	2018-19	2019-20	2020-21	2021-22
Total public school enrollments (includes preschool)	178,328	177,365	176,168	167,909	168,620
Total nonpublic school enrollments	16,422	16,165	15,823	16,294	17,516
Total, all elementary and secondary enrollments	194,750	193,530	191,991	184,203	186,136
Annual percent change, all enrollments	-0.9%	-0.6%	-0.8%	-4.1%	1.0%
First grade enrollments, total public	12,678	12,351	12,501	11,675	11,754
First grade nonpublic enrollments	758	699	643	775	868
Total first grade enrollments	13,436	13,050	13,144	12,450	12,622
Annual percent change, first grade all enrollments	2.3%	-2.9%	0.7%	-5.3%	1.4%
Twelfth grade enrollments, total public	13,235	13,073	13,188	13,131	12,880
Twelfth grade nonpublic enrollments	1,984	1,931	1,975	1,997	1,923
Total twelfth grade enrollments	15,219	15,004	15,163	15,128	14,803
Annual percent change, twelfth grade all enrollments	-1.4%	-1.4%	1.1%	-0.2%	-2.1%

Source: New Hampshire Department of Education, ELMI Analysis. Last Update 1/19/2023

SCHOLASTIC ASSESSMENT TEST	2017-18	2018-19	2019-20	2020-21	2021-22
SAT Scores of College-Bound Seniors^a					
Evidence-Based Reading and Writing (formerly Critical Reading)					
New Hampshire	535	533	531	540	530
United States	536	531	528	533	529
Math					
New Hampshire	528	526	524	526	521
United States	531	528	523	528	521
Percent of high school graduates taking the SAT					
New Hampshire	96.0%	95.0%	93.0%	71.0%	81.0%
United States	58.0%	60.0%	60.0%	41.0%	-

Source: The College Board and National Center for Educational Statistics. Last Update 1/19/2023

^a Reflects mean score for all graduates from an academic year who took the SAT at any point during high school. If a student took the SAT more than once, only the most recent result is included in mean score.

GRADUATES, NEW HAMPSHIRE PUBLIC SCHOOLS AND PUBLIC ACADEMIES	2016-17	2017-18	2018-19	2019-20	2020-21
Total number of graduates (standard and non-standard diplomas, and GED)	13,511	13,301	13,179	12,950	12,878
Annual percent change	-2.4%	-1.6%	-0.9%	-1.7%	-0.6%

Postsecondary Intentions of Graduates					
Entering a four-year college or university	50.0%	52.3%	50.8%	51.8%	49.0%
Entering a postsecondary instruction other than four-year	22.3%	20.2%	20.5%	16.6%	16.2%
Not entering a postsecondary institution:					
Enlisting in the Armed Forces	3.1%	3.3%	3.0%	2.7%	2.3%
Employment	17.5%	17.8%	17.9%	18.3%	20.8%
All other	7.1%	6.4%	7.8%	10.7%	11.4%

Source: New Hampshire Department of Education, ELMI Analysis. Last Update 1/19/2023

NEW HAMPSHIRE SCHOOL DISTRICT EXPENDITURES AND REVENUE	2017-18	2018-19	2019-20	2020-21	2021-22
Current operating expenses, elementary and secondary schools ^b (\$ millions of current dollars)	\$2,934.5	\$3,004.3	\$3,054.0	\$3,181.3	\$3,356.0
Annual percent change	3.1%	2.4%	1.7%	4.2%	5.5%
Average daily membership, public elementary and secondary schools	166,321	165,130	163,597	156,081	155,847
Annual percent change	-0.6%	-0.7%	-0.9%	-4.6%	-0.1%
Cost per pupil, current operating expenses ^b (current dollars)	\$17,643.00	\$18,194.00	\$18,668.00	\$20,383.00	\$21,534.00
Annual percent change	3.8%	3.1%	2.6%	9.2%	5.6%

Average salary of teachers, public elementary and secondary schools (in current dollars)	\$58,278	\$59,198	\$59,624	\$61,849	\$62,695
--	----------	----------	----------	----------	----------

Total net revenue (\$ millions of current dollars)	\$3,166.1	\$3,239.5	\$3,355.5	\$3,537.4	\$3,640.1
Annual percent change	2.3%	2.3%	3.6%	5.4%	2.9%

Percent of total school district revenues from:					
State funds	31.6%	31.2%	32.6%	32.2%	31.0%
Local and other funds	63.1%	63.7%	62.6%	60.7%	60.1%
Federal funds	5.3%	5.1%	4.8%	7.1%	8.9%

^b Includes tuition and transportation

Source: New Hampshire Department of Education, ELMI Analysis. Last Update 1/19/2023

NEW HAMPSHIRE POSTSECONDARY INSTITUTIONS	2016-17	2017-18	2018-19	2019-20	2020-21
Fall enrollments, public and private degree-granting institutions (students age 18 years and over)	133,159	149,184	160,750	169,412	188,545
By attendance status:					
Full-time students	70,777	68,251	72,697	75,319	82,305
Part-time students	62,382	80,933	88,046	94,019	106,240
By gender:					
Male	52,338	57,797	61,200	64,105	71,331
Female	80,821	91,387	99,543	105,233	117,214
Degrees conferred by public and private degree-granting institutions in NH					
Degree Awarded: ^c	26,634	31,389	33,554	33,990	
Associate's degrees	3,699	4,190	4,566	5,077	
Bachelor's degrees	14,869	17,198	19,005	20,273	
Graduate degrees, including doctorates	8,066	10,001	9,982	8,640	
By selected academic majors, Associate's and higher degrees: ^c					
Biological and Biomedical Sciences	633	630	643	674	715
Business, Management, Marketing, and Support	7,071	8,979	9,869	9,744	12,008
Communication and Journalism	766	926	920	990	1,022
Computer and Information Sciences and Support Services	1,823	2,053	1,703	1,819	2,628
Education	1,436	1,505	1,468	1,289	1,315
Engineering and Engineering Technologies	963	975	992	939	859
English Language and Literature	1,231	1,397	1,403	1,312	1,478
Health Professions and Clinical Sciences	3,537	4,253	4,944	5,188	5,697
Liberal Arts and Sciences, General Studies and Humanities	1,909	2,023	2,188	2,480	2,650
Natural Resources and Conservation	385	444	555	636	612
Parks, Recreation, Leisure and Fitness Studies	529	630	628	534	564
Psychology	1,665	2,107	2,242	2,373	2,945
Security and Protective Services	808	1,053	1,327	1,376	1,774
Social Sciences	1,041	1,118	1,208	1,125	1,217
Visual and Performing Arts	610	684	759	884	913
^c Data exclude awards for second majors, awards for postsecondary study of less than two years, and post-baccalaureate and post-master's certificates.					
Source: National Center for Educational Statistics, Integrated Postsecondary Education Data System. Last Update 1/19/2023					
Prepared by: New Hampshire Employment Security, Economic and Labor Market Information Bureau					
www.nhes.nh.gov/elmi (603) 228-4124					

HEALTH

Coronavirus Pandemic

Coronavirus infections and deaths reached new highs in New Hampshire during the winter of 2021-2022. Between the fourth quarter of 2021 and first quarter of 2022, the Centers for Disease Control (CDC) reported 183,000 cases and 973 deaths in New Hampshire, compared to 76,000 cases and 799 deaths over the previous winter. The Omicron variant of COVID-19, which became the dominant variant of the virus in late 2021, was more contagious, but also less deadly, than previous variants of the COVID-19 virus.¹

Cases and deaths during the second and third quarters of 2022 were slightly higher than in 2021, reflecting higher transmissibility of the virus, as well as a reduction in measures to stop the spread of the virus. While deaths increased from 121 in the third quarter of 2022 to 149 in the fourth quarter, there was not a surge in infections and deaths during the fourth quarter of 2022, as there had been during 2020 and 2021. While the pandemic is not over, 2022 had fewer deaths than 2021, and for most

New Hampshire residents, allowed a return to most pre-pandemic behaviors.

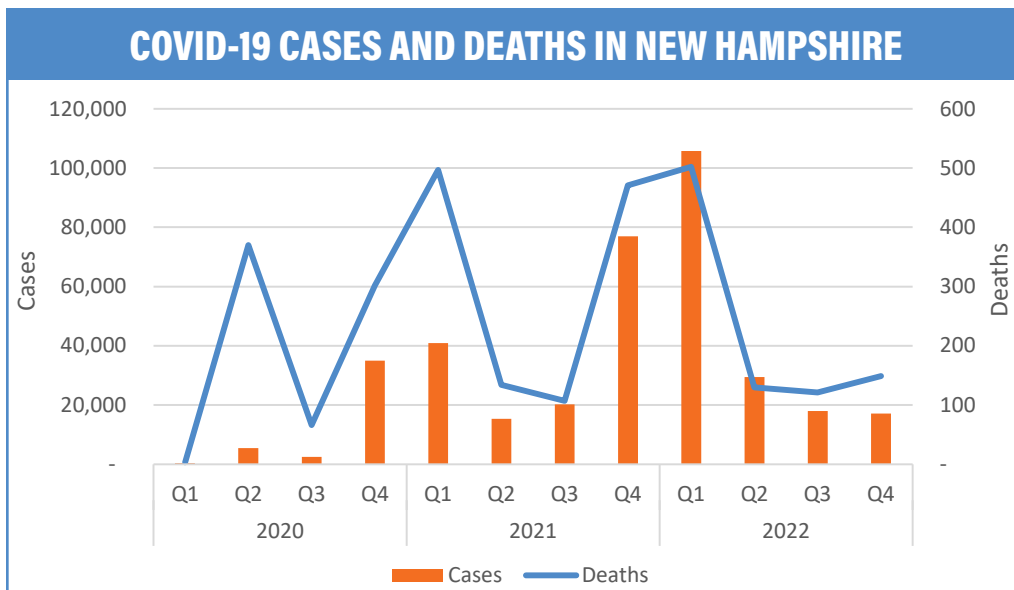
While COVID put a much smaller strain on New Hampshire’s hospitals during the fourth quarter of 2022, other respiratory infections have been prevalent. A high number of cases of Respiratory Syncytial Virus (RSV), a respiratory infection that can be serious for young children, filled pediatric hospitals to capacity.² Two winters of COVID-avoidance measures meant many young children were not exposed to other, more common illnesses, and were exposed to them for the first time in 2022, compressing three years’ worth of cases into one year.³

Healthiest State in the U.S.

The United Health Foundation, which ranks all 50 states on a number of health-related measures, rated New Hampshire as the healthiest state in the U.S. in 2022. While UHF declined to officially rank states in 2020 and 2021, during the peak of the coronavirus pandemic, New Hampshire received

the highest overall state score in 2020 and 2021 as well. Other New England states were also rated highly; the top four states in 2022 were all in New England, and Maine, ranked 12th, was the lowest rated New England state.

New Hampshire was rated highly on economic factors associated with health, including relatively



Source: U.S. Centers For Disease Control and Prevention

1 Beth Blauer, "Comparing Cases, Deaths, and Hospitalizations Indicates Omicron Less Deadly," Johns Hopkins University Coronavirus Resource Center. <https://coronavirus.jhu.edu/pandemic-data-initiative/data-outlook/comparing-cases-deaths-and-hospitalizations-indicates-omicron-less-deadly>
 2 Paul Cuno-Booth, "A surge of RSV infections is straining capacity at N.H. hospitals," New Hampshire Public Radio, December 2, 2022. <https://www.nhpr.org/nh-news/2022-12-02/a-surge-of-rsv-infections-is-straining-capacity-at-n-h-hospitals>
 3 Vanessa Romo, "RSV is surging. Here's what to watch for and answers about treatment options," NPR, November 2, 2022. <https://www.npr.org/2022/11/02/1133040571/rsv-questions-answers-treatment-options>

low rates of unemployment, poverty, income inequality and food insecurity. New Hampshire was also highly rated on clinical care, with a low percentage of uninsured residents and relatively high access to medical professionals. While access to primary care providers was rated 5th overall, access to mental health care (15th) and dental care (19th) providers was lower, although still above average.

New Hampshire lawmakers passed a bill in 2022 providing preventative dental benefits to Medicaid recipients, although only 16 percent of dentists in the state currently accept Medicaid.⁴ Unless more providers begin to accept Medicaid, access to dental providers will remain limited for New Hampshire's 80,000 Medicaid recipients. Dental care providers that accept Medicare can be particularly difficult to find in many rural areas of the state. To increase availability of care in rural areas, a dental residency program was created, beginning in September 2022, to bring recently graduated dentists to rural parts of New Hampshire for a one-year advanced graduate program specializing in rural dental care.⁵

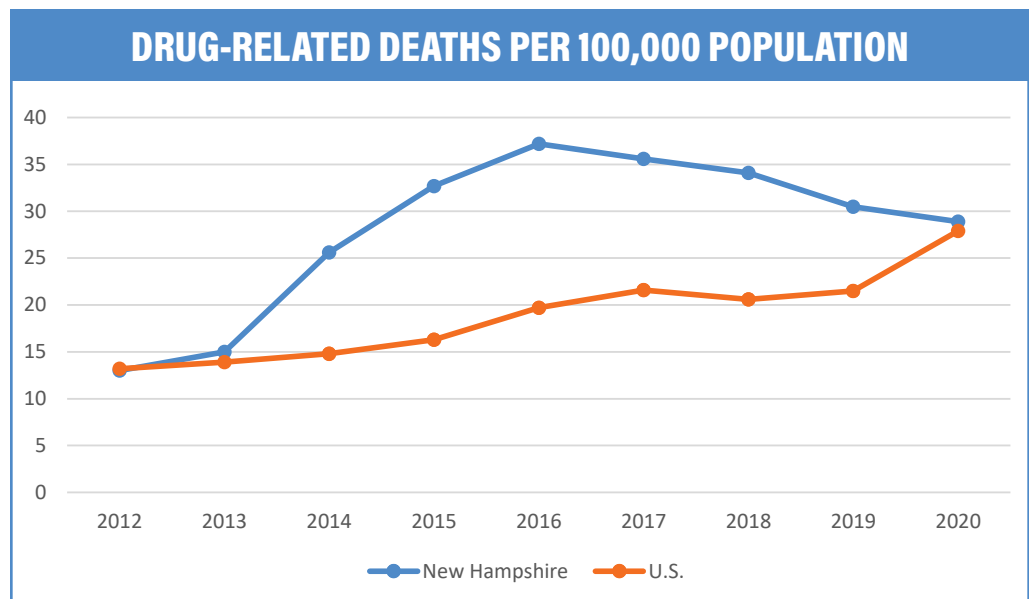
Drug-related death rates in New Hampshire declined between 2016 and 2020 (rankings for this metric use data from two years prior, so the 2022 ranking is based on the drug-related death rate for 2020), but the improvement in New Hampshire's ranking in 2022 appears to be primarily attributable to increasing drug death rates throughout the rest of the U.S., rather than a large decline in New Hampshire. Nationwide, the coronavirus pandemic indirectly led to an increase in drug-related deaths, particularly opioids. Several factors contributed to this increase: reduced access to interventions and increased levels of stress due to isolation and loss of mental health support.⁷ Changes to patterns of drug use and the types and purity of drugs were also a factor,⁸ as fentanyl has become increasingly prevalent, and is being combined with a greater number of other drugs, including cocaine and methamphetamines.⁹

Preliminary data suggest that drug-related death rates in New Hampshire increased again in 2021 and 2022. New Hampshire's Department of Health

13

Opioid Crisis

The United Health Foundation ranked New Hampshire 29th in the U.S. in drug-related deaths in 2022. This was a large improvement; New Hampshire ranked 40th the previous year, and as recently as 2018, had ranked 49th in this measure, with opioids responsible for the majority of drug-related deaths.⁶



Source: United Health Foundation

4 Annmarie Timmins, "State can't deliver new dental benefits to adults on Medicaid without more dentists," New Hampshire Bulletin, August 5, 2022. <https://newhampshirebulletin.com/2022/08/05/state-cant-deliver-new-dental-benefits-to-adults-on-medicaid-without-more-dentists/>
 5 Alli Fam, "NH residency program to bring dentists to rural areas," Valley News, August 8, 2022. <https://www.nhnews.com/New-dental-residency-program-to-bring-dentists-to-rural-health-centers-in-N-H-47527976>
 6 2018 ranking was based on drug-related death rates from 2014 through 2016.
 7 Rina Ghose, Amir M. Forati, and John R. Mantsch, "Impact of the COVID-19 Pandemic on Opioid Overdose Deaths: a Spatiotemporal Analysis," Journal of Urban Health, April 2022. <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC8856931/>
 8 Idb.
 9 New Hampshire Drug Monitoring Initiative, October 2022 Report, New Hampshire Department of Health and Human Services. <https://www.dhhs.nh.gov/sites/g/files/ehbemt476/files/documents2/dmi-october2022.pdf>

and Human Services reported a preliminary drug-related death rate of 30.9 deaths per 100,000 population in 2021, compared to 30.3 deaths in 2020. Through September, the number of drug-related deaths in 2022 exceeded the number of deaths over the first nine months of 2021, suggesting a further increase in drug-related deaths.

Health Insurance

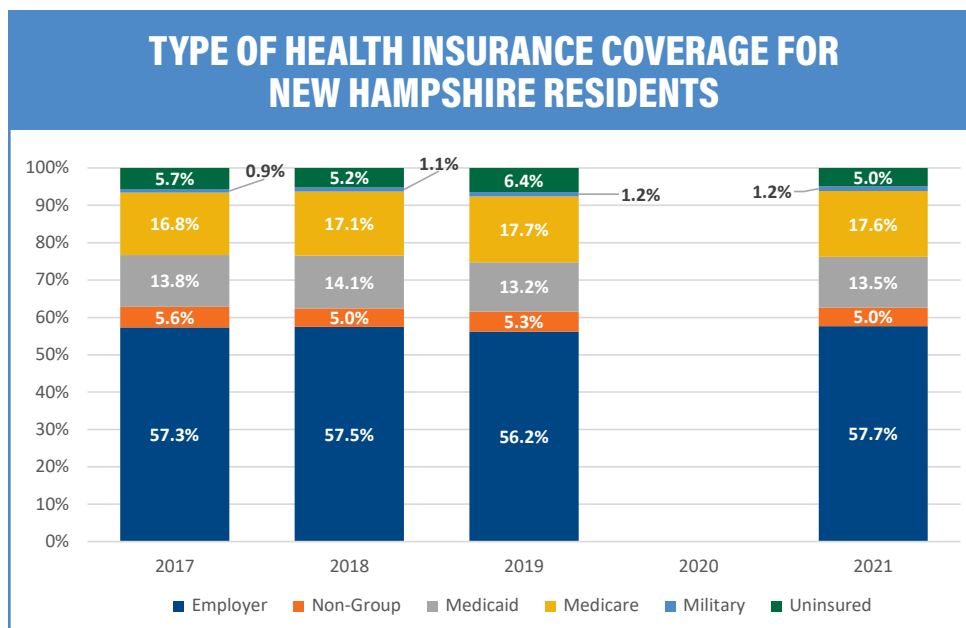
The Kaiser Family Foundation estimated that 5.0 percent of New Hampshire residents were uninsured in 2021, the lowest percentage ever recorded in the state. The percentage of uninsured New Hampshire residents increased in 2019 for the first time since 2014 the Affordable Care Act (ACA) established insurance marketplaces and subsidies for low-income residents in 2014. This followed a nationwide trend which saw uninsured rates increase slightly in 2017, 2018 and 2019. The Kaiser Family Foundation (KFF) did not publish estimates of uninsured residents for 2020, due to pandemic-related challenges.

Several acts of federal legislation passed in response to the coronavirus pandemic likely contributed to increased health insurance coverage in New Hampshire. The Families First Coronavirus Response Act (FFCRA), passed in March 2020, required Medicaid programs to keep recipients continuously enrolled through the end of the COVID-19 public health emergency (as of January 2023, the public health emergency was

still in effect).¹⁰ Medicaid enrollment, offering health insurance to those with limited income, had declined nationally in the two years prior to the pandemic, before increasing during the pandemic. In New Hampshire, Medicaid coverage increased from 13.2 percent in 2019 to 13.5 percent in 2021.

The American Recue Plan Act (ARPA), passed in March 2021, included additional funding for ACA health insurance subsidies. Subsidies had previously been available for those with in income 400 percent of the poverty line or below; ARPA increased this threshold, making a larger percentage of U.S. residents eligible for subsidized health insurance policies.¹¹ For individuals who were already eligible for financial assistance, existing subsidies were increased. ARPA also offered subsidies to individuals with an employment-based group health plan who, after either a layoff or reduction in hours, opted for COBRA continuation coverage.¹²

– Greg David



Source: Kaiser Family Foundation

10 Jennifer Tolbert and Meghana Ammula, "10 Things to Know About the Unwinding of the Medicaid Continuous Enrollment Provision," Kaiser Family Foundation, January 11, 2023. <https://www.kff.org/medicaid/issue-brief/10-things-to-know-about-the-unwinding-of-the-medicaid-continuous-enrollment-requirement/>

11 Matthew Rae et al., How the American Rescue Plan Act Affects Subsidies for Marketplace Shoppers and People Who Are Uninsured, Kaiser Family Foundation, March 25, 2021. <https://www.kff.org/health-reform/issue-brief/how-the-american-rescue-plan-act-affects-subsidies-for-marketplace-shoppers-and-people-who-are-uninsured/>

12 U.S. Department of Labor, FAQs About COBRA Premium Assistance Under the American Rescue Plan of 2021. <https://www.dol.gov/sites/dolgov/files/EBSA/about-ebbsa/our-activities/resource-center/faqs/cobra-premium-assistance-under-arp.pdf>

HOSPITAL INSURANCE	2017	2018	2019	2020	2021
HOSPITAL INSURANCE					
Original Medicare	250,636	251,956	243,068	240,172	
Medicare Advantage & Other Health Plans	30,354	38,222	55,666	67,394	
	280,990	290,178	298,734	307,566	

PRESCRIPTION DRUG (Medicare Part D)					
Prescription Drug Plans	160,943	163,105	162,971	161,729	
Medicare Advantage Prescription Drug	23,910	31,454	40,242	51,411	

Yearly Aged and Disabled Enrollment					
Aged Total	233,852	243,236	252,381	262,000	
Disabled Total	47,138	46,941	46,353	45,567	

Source: Centers for Medicare & Medicaid Services. Last Update 11/16/2022

MEDICAID INSURANCE	2016	2017	2018	2019	2020
Total Medicaid Enrollees	206,997	204,458	200,850	193,363	210,094
Federal Share, Medicaid Expenditures (Millions)	\$4,715.1	\$4,616.2	\$4,742.9	\$3,892.9	\$7,217.8
New Hampshire Share, Medicaid Expenditures (Millions)	\$2,435.2	\$2,523.4	\$2,707.0	\$2,687.8	\$4,143.1

Source: Centers for Medicare & Medicaid Services. Last Update 11/16/2022

MEDICARE UTILIZATION	2016	2017	2018	2019	2020
SKILLED NURSING FACILITIES (Medicare)					
Total Persons With Utilization*					
New Hampshire	10,812	10,745	10,162	9,235	7,549
United States	1,802,182	1,763,018	1,703,381	1,622,835	1,467,350
Covered Admissions Per 1,000 Original Medicare Part A Enrollees					
New Hampshire	59	58	55	52	55
United States	66	65	62	60	41
Covered Days of Care Per 1,000 Original Medicare Part A Enrollees					
New Hampshire	1,436	1,392	1,339	1,247	1,453
United States	1,693	1,623	1,559	1,475	1,057
Program Payments Per Covered Day					
New Hampshire	481	486	490	493	534
United States	446	459	471	489	551

*Utilization expresses the number of services used per year or per number of persons eligible for the services

MEDICARE UTILIZATION (continued...)	2016	2017	2018	2019	2020
SHORT STAY HOSPITALS (Medicare)					
Total Persons With Utilization*					
New Hampshire	33,631	34,043	33,472	31,590	26,674
United States	6,219,873	6,217,622	6,079,501	5,904,483	5,089,330
Discharges Per 1,000 Original Medicare Part A Enrollees					
New Hampshire	204	206	202	199	165
United States	258	258	252	246	210
Covered Days of Care Per 1,000 Original Medicare Part A Enrollees					
New Hampshire	950	975	985	962	833
United States	1,242	1,225	1,197	1,164	1,064
Program Payments Per Covered Day					
New Hampshire	2,561	2,624	2,683	2,809	2,859
United States	2,433	2,507	2,603	2,726	2,858
<i>Source: Centers for Medicare & Medicaid Services. Last Update 11/16/2022</i>					
*Utilization expresses the number of services used per year or per number of persons eligible for the services					

RELATED SERVICES	2016	2017	2018	2019	2020
HOSPICES (Medicare)					
Total Persons With Utilization*					
New Hampshire	6,029	6,397	6,783	7,164	7,464
United States	1,429,862	1,495,384	1,553,637	1,612,018	1,717,193
Covered Days of Care Per 1,000 Original Medicare Part A Enrollees					
New Hampshire	1,346	1,454	1,503	1,682	1,707
United States	1,810	1,858	1,936	2,026	2,079
Program Payments Per Covered Day					
New Hampshire	\$175	\$176	\$176	\$178	\$178
United States	\$167	\$169	\$169	\$171	\$175
*Utilization expresses the number of services used per year or per number of persons eligible for the services					

HOME HEALTH AGENCIES (Medicare)					
Total Persons With Utilization					
New Hampshire	22,355	22,155	22,300	21,531	20,053
United States	3,444,206	3,385,968	3,358,470	3,274,563	3,048,115
Service Visits Per 1,000 Original Medicare Enrollees					
New Hampshire	2,260	2,259	2,207	2,146	1,868
United States	2,849	2,754	2,731	2,640	2,265
Total Service Visits					
New Hampshire	564,158	566,260	555,981	521,512	448,747
United States	108,148,530	104,648,562	103,769,954	100,038,606	84,024,970
Program Payments Per Service Visit					
New Hampshire	\$176	\$179	\$185	\$190	\$206
United States	\$167	\$170	\$173	\$178	\$203
<i>Source: Centers for Medicare & Medicaid Services. Last Update 11/16/2022</i>					

OTHER HEALTH MEASURES	2017	2018	2019	2020	2021
Obesity (Percent of adult population)	26.6	28.1	29.6	31.8	29.9
Physical Inactivity (Percent of adult population)	19.3	23.9	21.5	21.7	19.3
Diabetes (Percent of adult population)	9	8.4	10.3	9.2	8.8
Frequent Mental Distress ¹	12.7	12	13.8	13.9	13.7
Frequent Physical Distress ²	11.9	11.9	11.3	13	10.2
Source: United Health Foundation. Last Update 11/16/2022					
¹ Percentage of adults who reported their mental health was not good 14 or more days in the past 30 days					
² Percentage of adults who reported their physical health was not good 14 or more days in the past 30 days					

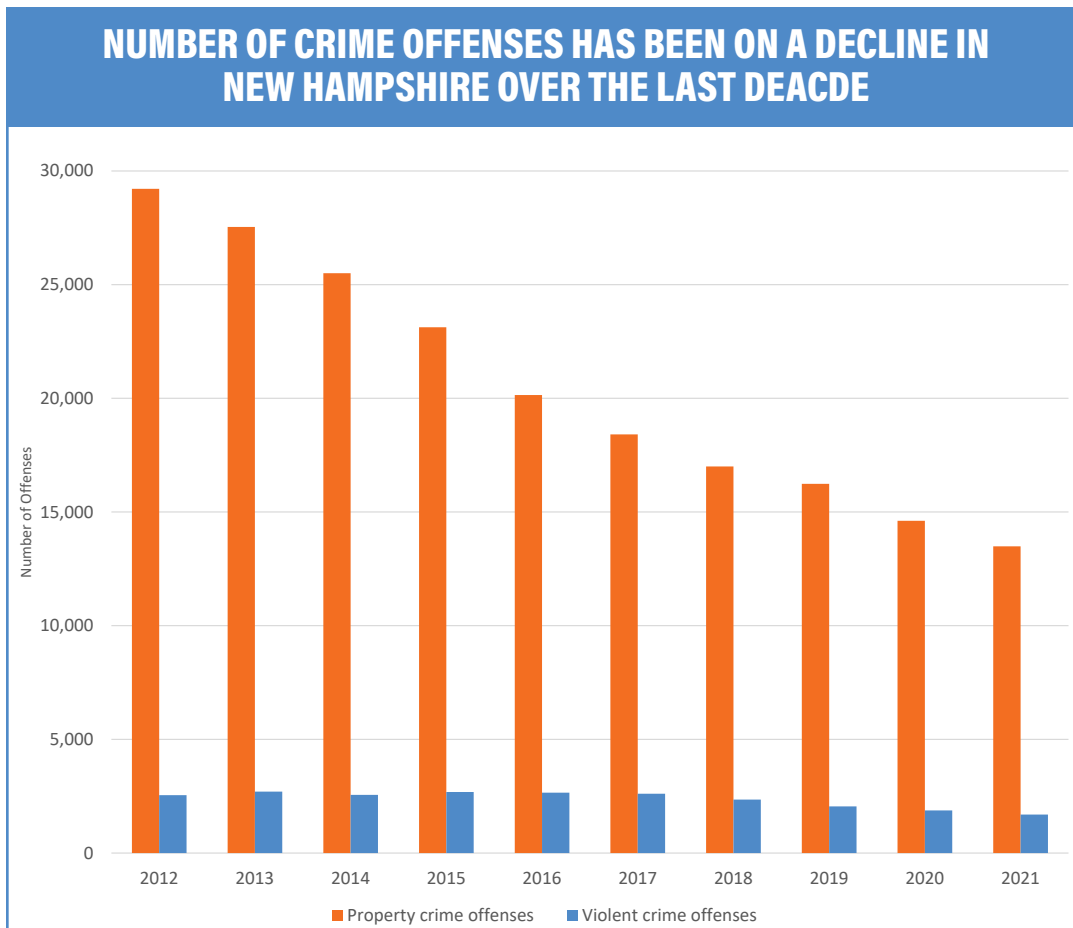
HEALTH INSURANCE COVERAGE	2017	2018	2019	2020	2021
Employer	57.3%	57.5%	56.2%	N/A	57.7%
Non-Group	5.6%	5.0%	5.3%	N/A	5.0%
Medicaid	13.8%	14.1%	13.2%	N/A	13.5%
Medicare ³	16.8%	17.1%	17.7%	N/A	17.6%
Military	0.9%	1.1%	1.2%	N/A	1.2%
Uninsured	5.7%	5.2%	6.4%	N/A	5.0%
Source: Kaiser Family Foundation. Last Update 11/16/2022					
³ The percentage of people with Medicare excludes those who report having both Medicare and Medicaid coverage.					
Prepared by: New Hampshire Employment Security, Economic and Labor Market Information Bureau					
www.nhes.nh.gov/elmi (603) 228-4124					

CRIME & CRASHES

In early spring 2022, a retired couple, Steve and Wendy Reid, went for their usual afternoon walk along the nature trail abutting the apartment complex where the couple lived. They did not return home that afternoon and their bodies were later found in the woods. Their autopsies determined that they were shot to death. It took about six months before the police arrested the presumed killer, Logan Clegg, in a public library in Burlington, Vermont.¹

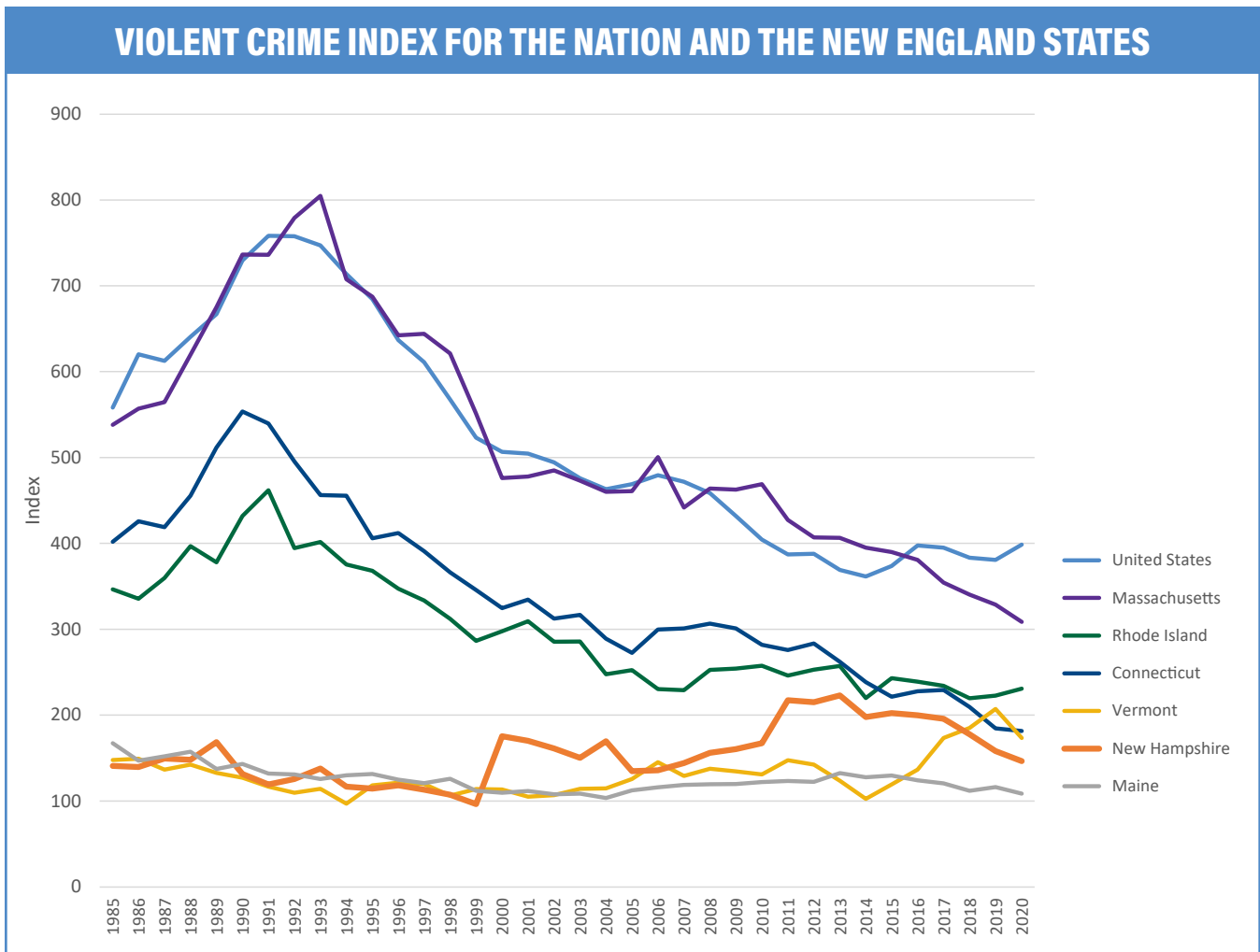
This “high profile” double murder made many residents wonder – Is it safe to go for a walk in my neighborhood or go for a hike on a nearby recreational trail? After all, this heinous crime happened in broad daylight! The reason why this double homicide in spring of 2022 resonated and lingered on the minds of many residents in New Hampshire, is that because such a crime is in staunch opposition to the image of the Granite State as a very safe place to live.²

<p>Violent Crime</p> <p>Offenses of murder and nonnegligent manslaughter (homicide), rape, robbery, and aggravated assault.</p>	<p>Property Crime</p> <p>Offenses of burglary, larceny-theft, motor vehicle theft, and arson.</p>
--	--



Source: Federal Bureau of Investigation, Crime Data Explorer

1 Callery, Tim "Date set for Logan Clegg trial as defendant waives arraignment in killings of Concord couple." WMUR. Jan 30, 2023. Accessed on March 6, 2023 at <https://www.wmur.com/article/concord-new-hampshire-couple-killed-logan-clegg-30/42706310>
 2 "Safest states 2023". New Hampshire ranked third after Vermont and Maine. Accessed on March 6, 2023 at <https://worldpopulationreview.com/state-rankings/safest-states>



Source: Federal Bureau of Investigation, Crime Data Explorer

How does this violent crime incident reflect on trends of crime statistics in New Hampshire? When evaluating the crime data for New Hampshire over the last decade, total number of crime offenses actually declined substantially. According to data from the FBI Uniform Crime Reporting Program,³ violent crime offenses in New Hampshire peaked at about 2,700 offenses in 2013 and dropped to just below 1,700 in 2021. The number of property crime offenses declined from above 29,300 reported offenses in 2011 to about 15,200 reported offenses in 2021.

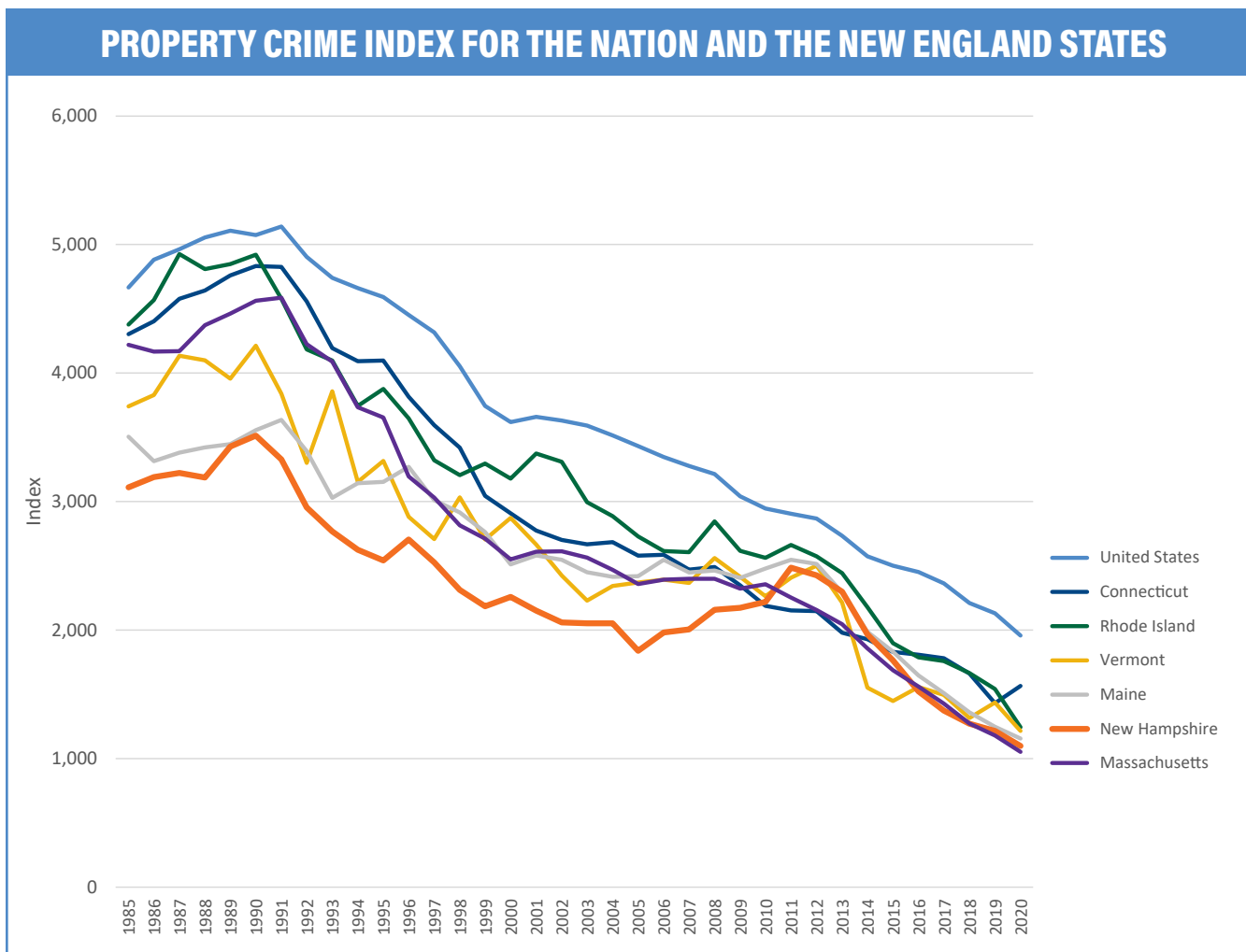
In 2021, the FBI began exclusively collecting data using a new reporting system, which allows more comprehensive and detailed reporting of crime

incidents. The National Incident-Based Reporting System (NIBRS) includes detailed data on 52 different offenses, plus arrest-only data on ten more offenses, including violent crimes, property crimes, and individual crimes such as animal cruelty, kidnapping, bribery, narcotics, gambling, and fraud. The reporting system includes details like demographics, location, gang involvement, or computer use in crimes. Information about these offenses were not reported under the previous crime reporting system.

Overall, New Hampshire and New England states generally rank as places with low levels of crime in comparison with other parts of the nation.⁴ Indexed crime data is not available for 2021 (see description

³ Crime data for New Hampshire are derived from National Incident-Based Reporting System (NIBRS) reports voluntarily submitted to the Federal Bureau of Investigation.

⁴ Data consideration: "The data found on the Crime Data Explorer [Uniform Crime Reporting (URC) Program] represents reported crime, and is not an exhaustive report of all crime that occurs. It's important to consider the various factors that lead to crime activity and crime reporting in a community before interpreting the data. Without these considerations the available data can be deceiving. Factors to consider include population size and density, economic conditions, employment rates, prosecutorial, judicial, and correctional policies, administrative and investigative emphases of law enforcement, citizens' attitudes toward crime and policing, and the effective strength of the police force." <https://cde.ucr.cjis.gov/LATEST/webapp/#>



Source: Federal Bureau of Investigation, Crime Data Explorer

Unavailable Statistics for 2021

Data users have relied on aggregate crime data collected and published by the Uniform Crime Reporting (UCR) Program of the Federal Bureau of Investigation (FBI) under the Summary Reporting System (SRS). That system’s aggregate counts provided snapshots of crime and served the law enforcement community and the public well since 1930. However, the FBI recognized the need for more robust crime data and has transitioned from traditional aggregate statistics provided by SRS to the more comprehensive information collected under the **National Incident-Based Reporting System (NIBRS)**.

Between 2016 and 2020, both SRS and NIBRS could be used by law enforcement agencies to report crime data. Beginning in 2021, NIBRS was the only method to report crime data, although not all law enforcement agencies have begun using NIBRS. Enough 2021 data was not reported that data cannot reliably be compared across years, so no crime index data is available for 2021.

of the new crime reporting system transition). Both violent crime and property crime indexes (rate per 100,000 population) have fallen nationally and in most New England states since the early nineties. The violent crime index for New Hampshire and Vermont did see increases since the 1990's, though from very low levels, and the violent crime rate in New Hampshire has fallen since 2013.

Fentanyl - Overdoses on the Rise

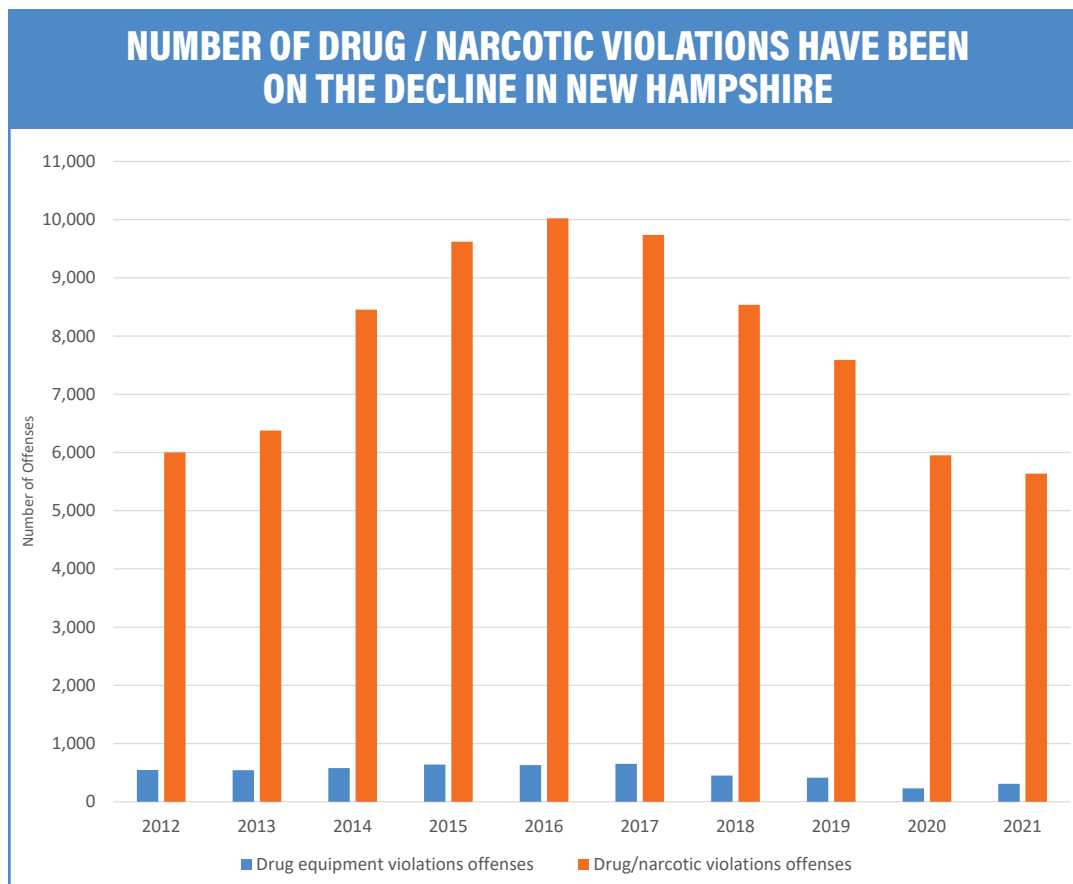
Though New Hampshire has a low crime rate, one major concern is the increase in the availability of illicit drugs. Over the past decade, one of the largest societal problems has been the opioid crisis. The deadly outcomes of this crisis have been elevated due to the prevalence of illicit drugs tainted with fentanyl.

The Governor created a public awareness campaign titled "No Safe Experience" to alert residents, with a special focus on youth and families, of the dangers and prevalence of fentanyl in any

pills not prescribed by a medical provider. "The bottom line is that fentanyl is now in all different types of substances, whether that be cocaine, methamphetamine, fake pills, or vape cartridges – assume it is in anything and everything," said Governor Chris Sununu.⁵

Data from U.S Drug Enforcement Administration (DEA) laboratory testing show that the majority of fentanyl-laced pills contained a level that was potentially lethal.⁶ Another indication of the serious negative effects of fentanyl in New Hampshire is that 2022 was the worst year for overdose deaths since 2017, and in the majority of the 434 confirmed overdose deaths, fentanyl was involved.⁷ The New Hampshire Department of Health and Human Services also released a warning about a heightened presence of the animal tranquilizer xylazine, found added to illicit street drugs such a heroin and fentanyl. The mixture of xylazine with heroin and fentanyl increases the risk of overdose and death.⁸

14



Source: Federal Bureau of Investigation, Crime Data Explorer

5 Governor Sununu Announces "No Safe Experience" PSA Campaign. Press Release January 12, 2023. <https://www.governor.nh.gov/news-and-media/governor-sununu-announces-no-safe-experience-psa-campaign>

6 Ibid.

7 Lynch, Troy, "New figures show 2022 was worst year for overdose deaths in New Hampshire since 2017." WMUR. <https://www.wmur.com/article/new-hampshire-overdose-deaths-2022/42921460>

8 NH DHHS Warns of Dangerous, Non-Opioid Animal Tranquilizer. NH DHHS Press Release. February 16, 2023. <https://www.dhhs.nh.gov/news-and-media/nh-dhhs-warns-dangerous-non-opioid-animal-tranquilizer>

As a consequence of this complex landscape of drug supply, two bills filed in the New Hampshire House of Representative aim to decriminalize drug checking equipment. Advocates for the substance abuse community believe that testing strips can save lives, however, New Hampshire law enforcement, though “sympathetic” to the mission of testing illicit drugs, have concerns about the equipment being used by drug traffickers to determine potency.⁹

The National Incident-Based Reporting System lists two crime statistics related to the opioid pandemic: drug/narcotic violations and drug equipment violations. Data from the last ten years show that the number of offenses for both drug violations and drug equipment violations have been declining since 2016. This could indicate a decline in the usage of illicit drugs, yet the deadly implications of fentanyl have not slowed down.

What is a Hate Crime?

Nationally, hate crimes have been at the center of several recent criminal cases, such as the shooting at a grocery store in a predominantly Black area of Buffalo in May 2022. During the pandemic, an increased number of crime incidents against Americans of Asian descent was observed. In late February 2023, there was an incident in Portsmouth, NH involving hateful graffiti at eight businesses and a temple.¹⁰ The FBI Uniform Crime Reporting Program collects statistics on hate crimes such as these.

According to the FBI, there were 34 reported cases for New Hampshire in 2021,¹² a 79 percent increase from 2020 of 19 reported incidents. A forum was held on February 9, 2023, organized by Jane Young, United States Attorney for the District of New Hampshire and New Hampshire Attorney General John Formella, in order to have a dialogue about the implication of hate crimes on New Hampshire’s communities. This forum was the first of a series of community hate crime forums. The forums are “designed is to engage local and federal law enforcement, advocacy groups and community members in discussions about preventing and responding to hate crimes in New Hampshire.”¹³

While law enforcement leaders stressed the importance of reporting hate-based actions, the victims of hate crimes noted that due to the lack of minorities in local law enforcement workforce, it can be hard for the authorities to fully understand the implications of a hate crime and bias among the minority communities in New Hampshire.¹⁴

Though hate crime statistics in New Hampshire might not seem large in numbers, the Attorney General added that preventing hate crimes is a top priority for law enforcement in New Hampshire.¹⁵

– Annette Nielsen

14

The FBI defines a hate crime as a committed criminal offense which is motivated, in whole or in part, by the offender’s bias(es) against a race, religion, disability, sexual orientation, ethnicity, gender, or gender identity.¹¹

9 Barndollar, Hadley, “Fentanyl is killing Granite Staters. But the tools to test for it are illegal,” February 17, 2023. New Hampshire Bulletin. <https://newhampshirebulletin.com/2023/02/17/fentanyl-is-killing-granite-staters-but-the-tools-to-test-for-it-are-illegal/>

10 Lenahan, Ian, “Portsmouth pushes back on overnight wave of hateful graffiti targeting Temple, businesses,” February 21, 2023. Portsmouth Herald. <https://www.seacoastonline.com/story/news/local/2023/02/21/portsmouth-nh-pushes-back-hateful-graffiti/69927174007/>

11 Federal Bureau of Investigation Crime Data Explorer. <https://cde.ucr.cjis.gov/LATEST/webapp/#/pages/explorer/crime/hate-crime>

12 Data for New Hampshire is available since 1994. The number of reported cases range from 1 to 49.

13 Feingold, Jeff, “U.S. attorney, AG team up on series of community hate crime forums,” January 12, 2023. NH Business Review. <https://www.nhbr.com/u-s-attorney-ag-team-up-on-series-of-community-hate-crime-forums/>

14 Bookman, Todd, “At hate crime forum, leader stress importance of reporting, while victims ask for more action,” February 9, 2023. NHPR. <https://www.nhpr.org/nh-news/2023-02-09/at-forum-on-hate-crimes-leaders-stress-importance-of-reporting-while-victims-ask-for-more-action>

15 Feingold, op.cit.

CRIME OFFENSES	2017	2018	2019	2020	2021
Total crime offenses	21,025	19,354	18,288	16,488	15,182
Annual percent change	-7.8%	-7.9%	-5.5%	-9.8%	-7.9%
Violent crime offenses	2,611	2,353	2,050	1,875	1,691
Annual percent change	-1.7%	-9.9%	-12.9%	-8.5%	-9.8%
Property crime offenses	18,414	17,001	16,238	14,613	13,491
Annual percent change	-8.6%	-7.7%	-4.5%	-10.0%	-7.7%

Total Crime Index (Rate per 100,000 population)					
United States	2,757.8	2,593.2	2,511.4	2,356.7	N/A
New Hampshire	1,570.0	1,448.5	1,374.5	1,245.3	N/A
Connecticut	2,010.1	1,871.5	1,616.9	1,746.7	N/A
Maine	1,629.3	1,471.2	1,363.8	1,264.8	N/A
Massachusetts	1,781.9	1,613.9	1,509.3	1,362.0	N/A
Rhode Island	1,993.3	1,885.2	1,764.2	1,476.3	N/A
Vermont	1,668.7	1,500.1	1,644.3	1,390.4	N/A

Violent Crime Index (Rate per 100,000 population)					
United States	394.9	383.4	380.8	398.5	N/A
New Hampshire	195.7	177.6	158.1	146.4	N/A
Connecticut	229.2	209.6	184.6	181.6	N/A
Maine	120.6	112.0	116.1	108.6	N/A
Massachusetts	354.3	340.3	328.7	308.8	N/A
Rhode Island	234.2	219.8	222.7	230.8	N/A
Vermont	173.3	185.0	207.2	173.4	N/A

Property Crime Index (Rate per 100,000 population)					
United States	2,362.9	2,209.8	2,130.6	1,958.2	N/A
New Hampshire	1,374.3	1,270.9	1,216.4	1,098.9	N/A
Connecticut	1,780.9	1,661.9	1,432.3	1,565.1	N/A
Maine	1,508.7	1,359.2	1,247.7	1,156.2	N/A
Massachusetts	1,427.6	1,273.6	1,180.6	1,053.2	N/A
Rhode Island	1,759.1	1,665.4	1,541.5	1,245.5	N/A
Vermont	1,495.4	1,315.1	1,437.1	1,217.0	N/A

Source: Federal Bureau of Investigation, ELMI Analysis. Last Update 3/7/2023

AUTO INSURANCE CLAIMS LOSS - PERSONAL AND COMMERCIAL	2017	2018	2019	2020	2021
Total Claims (\$ millions)	\$595.0	\$593.9	\$620.3	\$499.9	\$589.6
Annual percent change	8.7%	-0.2%	4.4%	-19.4%	17.9%
Personal Claims (\$ millions)	\$505.6	\$518.4	\$534.0	\$430.2	\$528.0
Annual percent change	5.1%	2.5%	3.0%	-19.4%	22.7%
Percent Personal	85.0%	87.3%	86.1%	86.1%	89.6%
Commercial Claims (\$ millions)	\$89.4	\$75.6	\$86.3	\$69.7	\$61.6
Annual percent change	34.8%	-15.5%	14.2%	-19.2%	-11.6%

Source: New Hampshire Insurance Department. Last Update 3/7/2023

CRIMINAL ARRESTS	2017	2018	2019	2020	2021
Total Arrests	48,884	46,923	46,201	35,554	32,486
Annual percent change	2.3%	-4.0%	-1.5%	-23.0%	-8.6%
Total Drug Abuse Violations	7,987	6,682	5,909	4,382	3,594
Annual percent change	-6.1%	-16.3%	-11.6%	-25.8%	-18.0%
Total DUI Offenses	4,886	5,102	5,346	3,919	3,596
Annual percent change	-1.1%	4.4%	4.8%	-26.7%	-8.2%
Juvenile Total	3,585	3,337	3,348	2,313	1,915
Annual percent change	-0.6%	-6.9%	0.3%	-30.9%	-17.2%
Total Drug Abuse Violations	516	353	345	205	145
Annual percent change	-20.0%	-31.6%	-2.3%	-40.6%	-29.3%
Total DUI Offenses	37	30	34	36	24
Annual percent change	-14.0%	-18.9%	13.3%	5.9%	-33.3%

Source: Federal Bureau of Investigation, ELMi Analysis. Last Update 3/7/2023

STATE PRISON POPULATION	2017	2018	2019	2020	2021
Number of sentenced prisoners in state and federal prisons ^a	2,750	2,745	2,691	2,352	2,127
New Hampshire's incarceration rate	203	202	197	170	152
Number of sentenced male prisoners	2,524	2,519	2,463	2,168	1,979
Number of sentenced female prisoners	226	226	228	184	148
Sentenced prisoners admitted	1,338	1,309	1,292	884	863
Sentenced prisoners released	1,409	1,335	1,339	1,246	1,088
Adults on Probation	3,914	3,916	3,659	2,723	
Adults on Parole	2,436	2,367	2,251	1,882	
U.S. incarceration rate (federal and state jurisdiction)	442	431	419	357	350
State jurisdiction incarceration rate	391	381	371	315	307
Federal jurisdiction incarceration rate	51	50	48	43	43

^a Sentenced prisoners are the number of inmates on December 31st sentenced for more than one year.

Source: U.S. Bureau of Justice Statistics. Last Update 3/7/2023

TRAFFIC CRASHES	2017	2018	2019	2020	2021
Total crashes reported ^b	36,681	34,174	33,592	25,895	28,092
Annual percent change	22.8%	-6.8%	-1.7%	-22.9%	8.5%
Seat belt use	67.6%	76.4%	70.7%	72.4%	75.5%
Fatal motor vehicle crashes	98	134	90	98	106
Fatal motor crashes as a share of total	0.27%	0.39%	0.27%	0.38%	0.38%
Number of fatalities	102	147	101	104	118
Number of alcohol-impaired driving fatalities ^c	27	48	37	75	39
Percent of alcohol-impaired driving fatalities ^c	27%	33%	37%	72%	33%
Fatalities per 100 million vehicle miles	0.75	1.07	0.73	0.87	

^b Reported crashes and injuries involving \$1,000 or more in property or injury damages.

^c Based on a highest driver Blood Alcohol Concentration (BAC) of 0.8 g/dL (grams per deciliter) or higher.

Source: NH Department of Safety, National Highway Traffic Safety Administration. Last Update 3/7/2023

Prepared by: New Hampshire Employment Security, Economic and Labor Market Information Bureau

www.nhes.nh.gov/elmi | (603) 228-4124

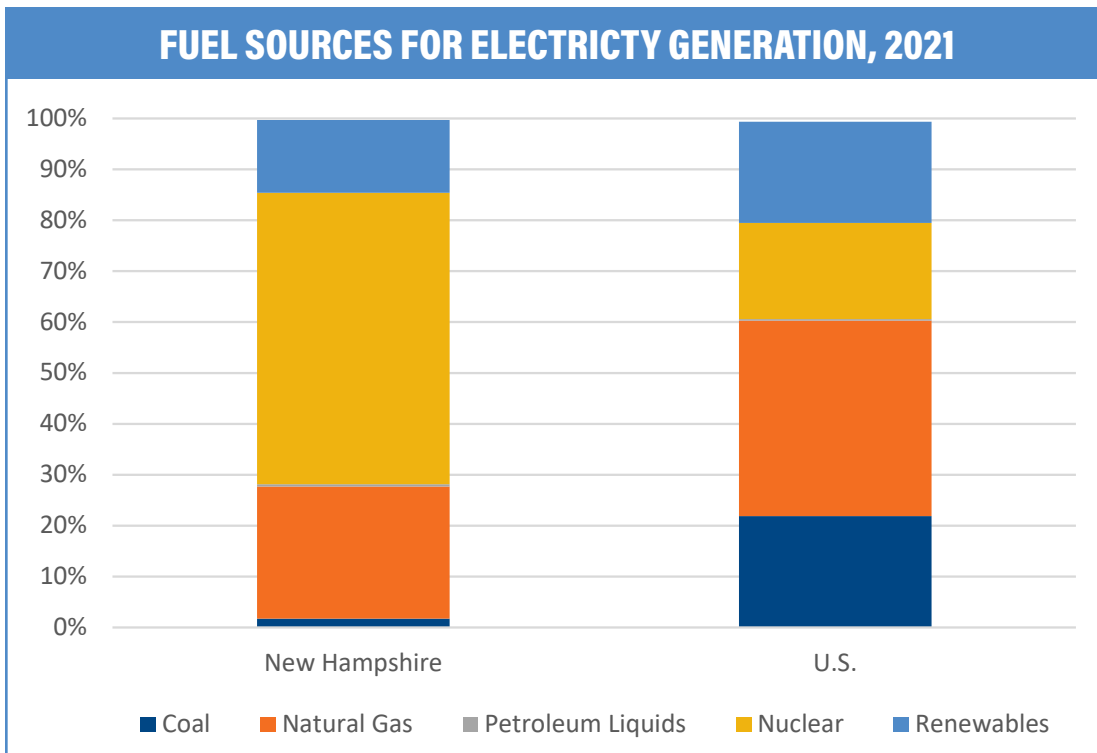
ENVIRONMENT & AGRICULTURE

Consumer Affairs, a private provider of consumer guides and customer reviews, rated New Hampshire as the third greenest state in the U.S., behind Washington and Oregon, and just ahead of Vermont and Maine.¹ States were evaluated using four criteria: the percent of the total energy generated by renewable resources and nuclear, carbon emissions per capita, municipal solid waste generated per capita and the percent of waste that is recycled or composted. New Hampshire ranked in the top 10 in all metrics compiled by Consumer Affairs, including fifth in the percentage of total energy generated by renewable resources and nuclear.

Nuclear and renewable energy were the source of more than 70 percent of the electricity generated in New Hampshire in 2021, nearly twice the national average of 39 percent.² This likely contributed to New Hampshire’s relatively low greenhouse gas emissions per capita, which tied with Washington for ninth lowest in the U.S. With 70 percent of

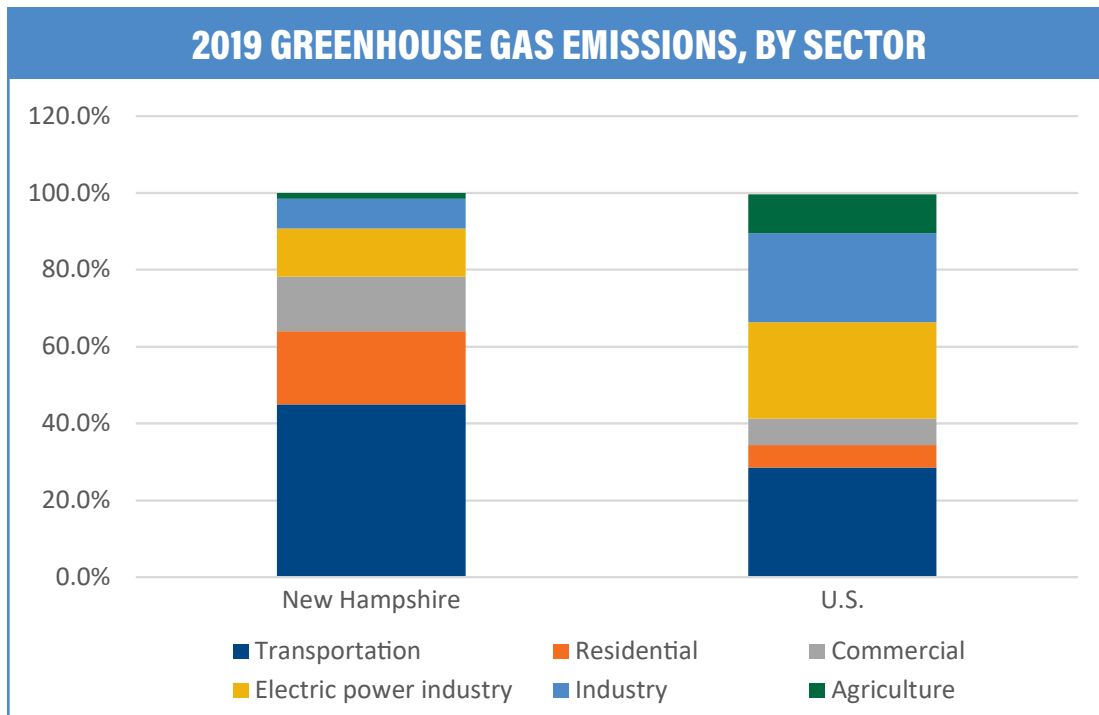
electricity created without fossil fuels, electricity generated in New Hampshire produced fewer greenhouse gases than electricity generated in the U.S. overall. In 2019, electricity generation accounted for 12.5 percent of greenhouse gas emissions in New Hampshire, while in the U.S., electricity accounted for 25.1 percent of emissions.³

Low emissions from electricity generation were offset by higher emissions in other sectors. Transportation activities were the largest source of emissions in New Hampshire, accounting for 45.0 percent of emissions in 2019, compared to 28.5 percent in the U.S. overall. With a relatively small, rural population, New Hampshire is reliant on privately-owned cars, rather than public transportation, walking or biking for transportation needs, resulting in high per capita transportation-related emissions. New Hampshire also produces relatively few emissions from industry, agriculture, and electricity generation, resulting in a higher share from transportation.



Source: U.S. Energy Information Administration

1 Kathryn Parkman, "Greenest States in the U.S.," *Consumer Affairs*. <https://www.consumeraffairs.com/solar-energy/greenest-states-in-us.html>
 2 U.S. Energy Information Administration, Electricity Data Browser. <https://www.eia.gov/electricity/data/browser/>
 3 U.S. Environmental Protection Agency, Greenhouse Gas Inventory Data Explorer. <https://cfpub.epa.gov/ghgdata/inventoryexplorer/#electricpowerindustry/entiresector/allgas/category/all>



Source: U.S. Environmental Protection Agency

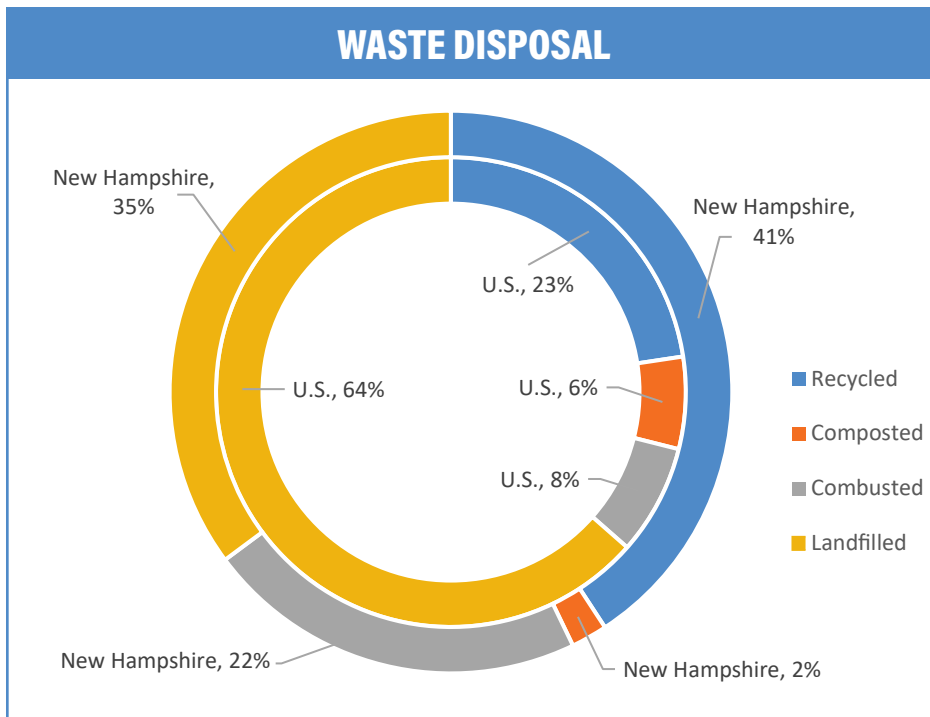
Residential emissions accounted for 19.0 percent of emissions in New Hampshire, compared to 5.8 percent in the U.S. overall. New Hampshire’s cold climate is largely responsible for high residential emissions. Residences in New Hampshire (and other northern states) require heating during the winter, mostly from fossil fuel sources such as fuel oil or propane. Residences in warmer regions of the U.S. require less heating. Although residences in warmer regions typically require more air conditioning than New Hampshire residences, air conditioners contribute to emissions from the electricity generation sector, rather than the residential sector.

New Hampshire ranked fourth in the U.S. in municipal solid waste generated per capita and seventh in waste recycled or composted, although waste metrics were based on an analysis of 2011 waste data. In 2011, New Hampshire disposed of 1.14 million tons of municipal solid waste (MSW), 0.87 tons per capita.⁴ This was well below the national average of 1.2 tons of waste per capita.

New Hampshire not only generated less waste per capita, less of this waste ended up in landfills. Of the waste disposed of in New Hampshire in 2011, 41 percent was recycled, two percent composted, and 22 percent combusted (incinerated), with the remaining 35 percent landfilled. Nationwide, 23 percent of waste was recycled, six percent composted and eight percent combusted, with the remaining 64 percent landfilled.

More recent data shows a different picture, both in New Hampshire and in the U.S. It’s unclear if this was the result of methodological changes or changing trends for MSW disposal. In New Hampshire, the amount of waste disposed of by combustion or into landfills was 1.09 million tons in 2018,⁵ compared to 0.65 million tons in 2011. Despite this increase, waste per capita in New Hampshire remained below the national average. In 2018, Americans generated 4.9 pounds of MSW per person per day (0.89 tons per capita), compared to 4.4 pounds in New Hampshire (0.80 tons per capita). Waste per capita in

4 Dolly Shin, *Generation and Disposition of Municipal Solid Waste (MSW) in the United States – A National Survey*, Columbia University Earth Engineering Center. https://furtherwithfood.org/wp-content/uploads/2020/07/Generation-and-Disposition-of-Municipal-Solid-Waste-in-the-US-A-National-Survey_Shin_2014.pdf
 5 New Hampshire Department of Environmental Services, 2020-2021 Biennial Solid Waste Report, November 2022. <https://www.des.nh.gov/sites/g/files/ehbemt341/files/documents/r-wmd-22-04.pdf>



Source: Columbia University

New Hampshire fell to 4.2 pounds per day in 2020, (0.76 tons per capita), likely a result of reduced economic activity during the coronavirus pandemic.

The amount of waste combusted in New Hampshire declined since 2011. New Hampshire had two waste-to-energy facilities that burned municipal waste to generate electricity, but one of these facilities closed in 2013.⁶ The remaining active waste-to-energy facility in New Hampshire incinerated 189,000 tons of waste in 2021, about 75 percent of what was combusted in 2011.⁷

Renewable Energy

In 2020, New Hampshire ranked 36th among all states in solar energy, with the capacity to produce 159 MW of electricity from solar arrays.⁸ Although the state added 32.5 MW of solar capacity in 2021, it fell to 40th in total capacity, an indication that solar arrays are being installed in other states at a faster rate. The Solar Energy Industries Association projects that New Hampshire’s solar capacity will increase more than 300 percent over the next five years, but the projected increase ranks 43rd in the U.S., suggesting that New Hampshire will continue to lag behind other states in solar capacity in the near future.

Wind power generates more electricity than solar in New Hampshire, with capacity of 214 MW. There are no wind farms currently under construction in New Hampshire, but plans to develop offshore wind farms could substantially increase New Hampshire’s wind power generation capacity. Along with Maine, Massachusetts, and the U.S. Department of the Interior, New Hampshire has been working on plans to build offshore wind farms in the Gulf of Maine, although this project remains in early stages of development.

The Department of the Interior issued a request for interest in August 2022, gauging commercial interest in obtaining wind energy leases in the Gulf of Maine, while the University of Maine has proposed a research array of 12 floating turbines capable of producing 144 MW of electricity.⁹

Although it will be years before large-scale wind farms in the Gulf of Maine start to generate electricity, the University of Maine estimates that wind farms in the Gulf of Maine could generate 156 GW of electricity from wind power, roughly seven times the capacity of all electricity producers in New Hampshire, Maine, and Massachusetts.^{10,11} As the U.S. transitions away from fossil fuels, offshore wind could be the primary source of renewable energy for New Hampshire and other New England states.

– Greg David

6 Waste Management, Wheelabrator to Close Claremont Facility. <https://www.wm.com/about/wm-monday/wheelabrator.jsp>
 7 Wheelabrator Technologies, Wheelabrator Concord. <https://www.wtienergy.com/plant-locations/waste-energy/wheelabrator-concord>
 8 Solar Energy Industries Association, State Solar Spotlight. <https://www.seia.org/sites/default/files/2023-01/New%20Hampshire.pdf>
 9 U.S. Department of the Interior, Bureau of Ocean Energy Management. Gulf of Maine. <https://www.boem.gov/renewable-energy/state-activities/maine/gulf-maine>
 10 University of Maine Advanced Structures and Composites Center, Offshore Wind in Maine. https://composites.umaine.edu/wp-content/uploads/sites/20/2016/12/UMaineCompositesCenter_OffshoreWind_12122016.pdf
 11 156 GW is the amount of power that is physically possible to generate, it is likely not economically feasible to generate that much power in the Gulf of Maine.

TOXIC RELEASE INVENTORY	2017	2018	2019	2020	2021
On-site Disposal or Other Releases (Pounds)					
New Hampshire	148,227	208,475	145,104	100,229	144,775
Annual percent change	-17.2%	40.6%	-30.4%	-30.9%	44.4%
New England	12,437,243	11,548,475	9,382,768	7,818,276	8,087,645
Annual percent change	40.8%	-7.1%	-18.8%	-16.7%	3.4%
U.S. (1,000 pounds)	3,554,214	3,282,126	2,962,214	2,703,929	2,888,299
Annual percent change	11.8%	-7.7%	-9.7%	-8.7%	6.8%

Off-site Disposal or Other Releases (Pounds)					
New Hampshire	165,435	232,354	247,990	348,070	262,141
Annual percent change	6.5%	40.5%	6.7%	40.4%	-24.7%
New England	6,383,692	7,349,050	7,068,401	6,484,248	6,280,336
Annual percent change	-17.9%	15.1%	-3.8%	-8.3%	-3.1%
U.S. (1,000 pounds)	389,076	419,906	423,293	341,558	389,942
Annual percent change	-3.7%	7.9%	0.8%	-19.3%	14.2%

Total On-site and Off-site Disposal or Other Releases (Pounds)					
New Hampshire	313,661	440,829	393,094	448,299	406,916
Annual percent change	-6.2%	40.5%	-10.8%	14.0%	-9.2%
New England	18,820,934	18,897,526	16,451,169	14,302,525	14,367,981
Annual percent change	13.3%	0.4%	-12.9%	-13.1%	0.5%
U.S. (1,000 pounds)	3,943,290	3,702,032	3,385,507	3,045,486	3,278,241
Annual percent change	10.1%	-6.1%	-8.6%	-10.0%	7.6%

Source: U.S. Environmental Protection Agency, ELMI Analysis. Last Update 1/20/2023

FOREST INVENTORY DATA	2017	2018	2019	2020	2021
Number of all live trees on forest land by Species group and Tree class code (in number)					
Growing stock	3,747,237,184	3,735,483,767	3,733,910,625	3,704,467,769	
Rough cull	504,200,124	500,825,911	469,425,181	452,077,727	
Rotten cull	23,082,695	22,536,693	21,223,651	21,009,569	
Total	4,274,520,003	4,258,846,371	4,224,559,456	4,177,555,065	

Source: U.S. Forest Service, ELMI Analysis. Last Update 1/20/2023

MAPLE SYRUP PRODUCTION	2017	2018	2019	2020	2021
New Hampshire (1,000 gallons)	160	163	148	154	127
United States (1,000 gallons)	4,385	4,199	4,180	4,111	3,721

FRUIT AND VEGETABLE CROPS	2017	2018	2019	2020	2021
Apples ¹ Yield per Acre ² (Bushels)					
New Hampshire	469	314	321	302	312
New England	367	NA	324	269	310
Strawberries Yield per Acre ³					
New Hampshire	6,800	5,900	5,700	5,800	5,800
New England	NA	2,490	1,700	5,500	5,300
Pumpkins Yield per Acre ⁴					
New Hampshire	14,300	12,500	18,000	11,700	9,800
New England	11,900	8,900	9,800	10,300	9,300
Tomatoes Yield per Acre ⁴					
New Hampshire	13,000	13,700	11,600	13,000	15,200
New England	13,000	10,600	9,100	9,400	10,300
Sweet Corn Yield per Acre (Dozen ⁵)					
New Hampshire	906	800	824	776	812
New England	718	800	765	718	753
¹ Apple production from commercial orchards with 100 or more trees.					
² Yield based on total production, which includes unharvested production and fruit production but not sold due to market conditions					
³ Total tabulated pounds produced per bearing acre harvested.					
⁴ Total tabulated pounds produced per acre harvested.					
⁵ Standard weight used for a dozen ears is 8.5 pounds					
Source: USDA - National Agricultural Statistics Service, ELMi Analysis. Last Update 1/20/2023					
Prepared by: New Hampshire Employment Security, Economic and Labor Market Information Bureau					
www.nhes.nh.gov/elmi (603) 228-4124					

GLOSSARY & INDEX

- Average Weekly Wage** (Section 2)
Total wages paid by employers divided by average covered jobs, divided by the number of weeks in the reference period.
- Benefits Paid, Unemployment Insurance** (Section 3)
Money payable to an unemployed individual as compensation for lost wages. Includes benefits paid on wages earned in covered employment; plus interstate benefits; adjusted for benefit recoveries, and for transfers under the interstate combined wage plan.
- Birth Rate** (Section 1)
Number of resident live births per 1,000 resident population.
- British Thermal Units (BTUs)** (Section 8)
The quantity of heat needed to raise the temperature of one pound of water one degree Fahrenheit at a specified temperature.
- Capital Expenditures** (Section 9)
Capital spending for new and used structures and equipment (includes capitalized software) by U.S. nonfarm businesses with and without paid employees.
- Chained Dollars** (Section 9)
A methodology for adjusting for inflation, which includes both quantities produced and relative prices of goods and services.
- Civilian Labor Force** (Section 3)
That portion of the population age sixteen and older which is employed or unemployed and actively seeking employment. Members of the armed forces and the institutionalized population are excluded.
- Construction Contract Value Index** (Section 11)
Indexed dollar value of contracts for new construction, additions, and major alterations, but not for maintenance.
- Consumer Price Index for Urban Consumers (CPI-U)** (Section 2)
An index used to measure changes in the cost of a market basket of selected goods and services. Often the reference for cost of living adjustments in wages and entitlements.
- Covered Employment** (Section 2)
Employment in any industry insured under the provisions of the New Hampshire Unemployment Compensation Law or subject to the Unemployment Compensation for Federal Employee (UCFE) program.
- Crime Index** (Section 14)
Selected offenses used to gauge fluctuations in the overall volume and rate of crime reported to law enforcement. The offenses included are the violent crimes of murder and nonnegligent manslaughter, forcible rape, robbery, and aggravated assault; and the property crimes of burglary, larceny/theft, and motor vehicle theft.

- Current Dollars** (Section 9)
 Figures reflecting actual prices or costs prevailing during the specified year(s).
- Death Rate** (Section 1)
 Crude Number of resident deaths per 1,000 resident population.
- Defense Contracts** (Section 9)
 Contracts awarded to provide military supplies, services, and construction made during a specified fiscal year.
- Degree-granting Institutions** (Section 12)
 Postsecondary institutions that are eligible for Title IV federal financial aid programs and grant an associate's or higher degree. For an institution to be eligible to participate in Title IV financial aid programs it must offer a program of at least 300 clock hours in length, have accreditation recognized by the U.S. Department of Education, have been in business for at least 2 years, and have signed a participation agreement with the Department.
- Divorce Rate** (Section 1)
 Number of divorces, annulments, and legal separations per 1,000 resident population.
- Durable Goods** (Section 4)
 Items with a normal life expectancy of three or more years. Expenditures for durable goods are generally postponable. Consequently, durable goods sales are the most volatile component of consumer expenditures. Common examples of durable goods items are automobiles, furniture, household appliances, mobile homes, etc.
- Duration of Benefit Payments** (Section 3)
 Average Number of weeks compensated for unemployment during the year, divided by the number of first payments. May include more than one period of unemployment.
- Electric Utility** (Section 8)
 A corporation, person, agency, authority, or other legal entity or instrumentality that owns and/or operates facilities for the generation, transmission, distribution, or sale of electrical energy, primarily for use by the public, and that files forms listed in the Code of Federal Regulations, Title 18, Part 141. Facilities that qualify as cogenerators or small power producers under the Public Utility Regulatory Policies Act are not considered utilities.
- Energy Consumption** (Section 8)
 The use of energy as a source of heat or power or as a raw material input to a manufacturing process.
- Energy Generated, Net** (Section 8)
 The total amount of electric energy produced by a generating station less the electric energy consumed for station use.
- Federal Home Loan Mortgage Corporation (Freddie Mac)** (Section 11)
 A shareholder-owned corporation that invests in home mortgages, ultimately providing lower housing costs and access to home financing.
- Fuel Consumed to Generate Electricity** (Section 8)
 Fuel required by all types of electricity generating plants. Coal, gas, and nuclear fuels are shown in equivalent barrels of oil.

- Gross Domestic Product (GDP)** (Section 9)
The market value of all final goods and services produced by resources located in the United States, regardless of ownership.
- Gross Domestic Product by State (GDP)** (Section 9)
The market value of all final goods and services produced by resources located in a state, regardless of ownership. GDP by State for the United States differs from GDP for the following reasons: GDP by State excludes – and GDP includes – the compensation of federal civilian and military personnel stationed abroad and government consumption of fixed capital for military structures located abroad and for military equipment, except office equipment.
- Home Health Agency** (Section 13)
Home Health Agency is an agency or organization which is primarily engaged in providing skilled nursing services and other therapeutic services. These services are given at home by a variety of skilled health care professionals.
- Home Sales (existing homes)** (Section 11)
Estimates based on multiple listing data. Projections are made with the cooperation of the National Association of Realtors. Data primarily consists of existing units of single family homes, town houses, condominiums, and cooperatives. Multiple units are excluded.
- Hospice** (Section 13)
Items and services provided to individuals who are terminally ill, and for their family. This care includes physical care and counseling.
- Household** (Section 2)
All the people who occupy a housing unit (single occupants, two or more unrelated occupants, and families).
- Housing Permits** (Section 11)
The number of new housing units authorized by building permits.
- Incarceration Rate** (Section 14)
The number of persons confined in prison, with sentences over one year, per 100,000 resident population.
- In-migration** (Section 1)
That part of the increase in the population not attributable to the natural increase rate. Generally, this is the populace moving to New Hampshire from an out-of-state residence or from outside the U.S.
- Labor Force Participation Rate** (Section 3)
The percentage of the civilian noninstitutional population age sixteen or older that is working or looking for work.
- Marriage Rate** (Section 1)
Number of marriages per 1,000 resident population.
- Meals and Rentals Tax Receipts** (Section 10)
Estimate of sales by hotels, motels, and eating and drinking establishments based on taxes received under the Meals and Rental Tax.

- Median** (Section 2)
The value exactly in the middle of a set of data that are ranked in order of ascending size. Half of all data values will be less than the median, while half will be more.
- Medicaid** (Section 13)
A joint federal-state program providing medical assistance to certain low income individuals and families.
- Medicare** (Section 13)
A federal program providing hospital insurance and supplementary medical insurance for persons who are eligible for retirement benefits and have attained the age of 65, disabled persons entitled to social security disability benefits, and workers or their dependents with permanent kidney failure.
- Multiple Listing Service (MLS)** (Section 11)
A real estate database that makes it possible to share listings of available properties between brokers, sellers, and buyers.
- Natural Increase Rate** (Section 1)
The number of resident births minus deaths per 1,000 total resident population.
- New Hampshire Housing Finance Authority (NHHFA)** (Section 11)
A non-profit corporation that operates programs designed to assist low and moderate income persons and families to obtain decent, safe and affordable housing.
- Nonfarm Employment** (Section 4)
Place of work employment that does not include private household workers, self-employed, unpaid family workers, and domestics or agricultural workers.
- Nondurable Goods** (Section 4)
Items that generally last for less than three years. Nondurable goods items are generally purchased when needed. Common examples of nondurable goods items are food, beverages, apparel, gasoline, etc.
- Non-current Loans** (Section 6)
Loans and leases 90 days or more past due or in nonaccrual status.
- Outdoor Recreation Value Added** (Section 10)
Outdoor recreation is all recreational activities undertaken for pleasure that occur outdoors. Value added is the difference between an industry’s gross output (sales or receipts plus other operating income and inventory change) and its intermediate inputs (goods and services that are used in the production of other goods and services).
- Outdoor Recreation, Core and Supporting** (Section 10)
The economic impact of outdoor recreation activities includes the value of goods and services directly related to outdoor recreation (“core” goods and services), as well as the value of goods and services that support access to outdoor recreation (“supporting” goods and services). Core outdoor recreation goods and services include gear, equipment, fuel, concessions, maintenance, repair, and fees related to outdoor recreation activities. Supporting goods and services includes travel and tourism (trips more than 50 miles from home), as well as local trips (less than 50 miles from home), construction, and government expenditures.”

- Parole** (Section 14)
A condition of release of an inmate from prison serving an unexpired sentence, who has to report to a parole officer.
- Per Capita Disposable Income** (Section 2)
Personal income less personal taxes and non-tax payments.
- Per Capita Personal Income** (Section 2)
Total personal income divided by total population.
- Personal Income** (Section 2)
The current income received by all the residents of the state from all sources, including wages and salary disbursements, other labor income, proprietors’ income, rental income, interest, dividends, and transfer payments; less personal contributions for social insurance.
- Probation** (Section 14)
A suspended sentence for a convicted offender giving the offer of freedom during good behavior under supervision of a probation officer.
- Real Gross Domestic Product** (Section 9)
The market value of all final goods and services by resources located in the United States, regardless of ownership, adjusted for inflation.
- Real Gross Domestic Product by State** (Section 9)
The market value of all final goods and services produced by resources located in a state, regardless of ownership, adjusted for inflation.
- Scholastic Assessment Test (SAT)** (Section 12)
(formerly Scholastic Aptitude Test) Mean test score for all students in the state who took the SAT exam during the designated academic year.
- Short Stay Hospital** (Section 13)
A hospital that provides inpatient medical care and other related services for surgery, acute medical conditions or injuries (usually for a short term illness or condition).
- Short Tons (S/T)** (Section 7)
A unit of mass equal to 2,000 lb (exactly 907.18474 kg).
- Skilled Nursing Facility** (Section 13)
Facility that provides care that can only be given by a registered nurse or doctor.
- Toxic Release Inventory** (Section 15)
Toxic Release Inventory tracks the management of certain toxic chemicals that may pose a threat to human health and the environment. A “release” of a chemical means that it is emitted to the air or water, or placed in some type of land disposal. U.S. facilities in different industry sectors must report annually how much of each chemical is released to the environment and/or managed through recycling, energy recovery and treatment.
- Unemployed** (Section 3)
Persons who were not employed during the monthly survey week but were available for work and were overtly engaged in a job-seeking activity within the previous four week period, waiting to be recalled from a layoff, or waiting to report to a new job within thirty days.

Value Added by Manufacture (Section 9)

A measure of manufacturing activity used for comparing the relative economic importance of manufacturing among industries and geographic areas. The cost of materials, supplies, fuels, etc. are subtracted from the value of shipments plus receipts for services rendered, and adjusted by adding value added by merchandising plus net change in finished goods and work-in-process between the beginning and the end of the year.

Vehicle Registration (Section 7)

A count of the registration certificates on file at the Department of Safety at the end of each calendar year.

Weekly Benefit Amount, Average (Section 3)

Benefits paid for total unemployment during the year divided by the number of weeks compensated.

Weeks Compensated for Unemployment (Section 3)

Number of weeks of unemployment for which benefits were paid including both total and partial unemployment. Interstate claims are counted in the paying state.