

New Hampshire ECONOMIC CONDITIONS

September 2021

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Temporary Staffing in New Hampshire's Health Care Industry

In 2019, the health care and social assistance industry became the largest industry in New Hampshire, employing an average of 94,100 workers. The industry averaged 1.6 percent labor force growth from 2017 to 2019, faster than New Hampshire's total workforce, which grew at a rate of 1.0 percent. Compared to the U.S., New Hampshire has a larger and wealthier (on average) population of residents over the age of 65, which has been a factor in the overall growth of the health care and social assistance industry.

Federal regulations require health care facilities to maintain adequate staffing to care for their patients. Patients require staff 24 hours a day, 365 days a year. The number of patients in a facility can fluctuate, and additional

staff may be needed to provide care for a higher than normal volume of patients. To cover these fluctuations, as well as staff illness, vacations, and other leave time, the health care industry maintains staffing levels through use of temporary staff, including per-diem and travel workers.

Per-diem staff work on a day-by-day basis, often filling in as needed in a variety of clinical settings, and at several health care facilities within a region.¹ Travel positions are longer-term, and typically involve relocating to an area to work in a specific position.² Travel positions usually last for approximately 13 weeks (3 months), but can be longer or shorter.

Both per-diem and travel workers are typically employed by a staffing

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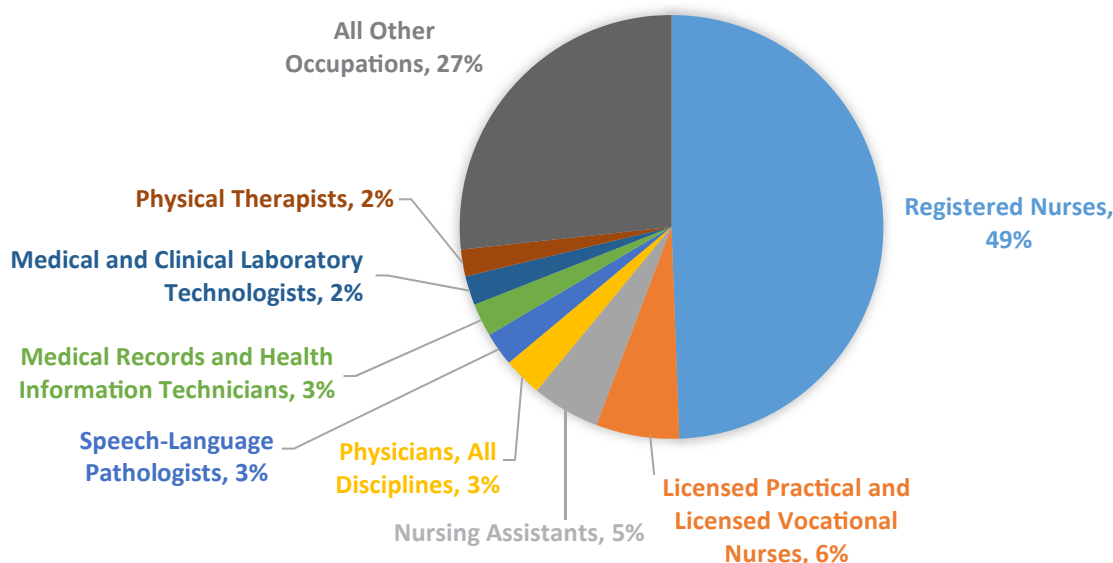
Claims Activity 10

agency, and paid a higher salary than permanent staff to compensate for irregular schedules. Travel workers generally receive benefits such as health insurance and a 401(k) through their employer, as well as assistance finding housing each time they relocate to work a new temporary position. Per-

diem workers, since they do not have a set schedule or hours, are less likely to receive benefits or paid leave time. Instead, they have the flexibility to work as much or as little as they want.

Emsi Burning Glass' Labor Insight tool was used to identify health care job postings that requested travel and per-diem health care workers.³ Job postings from the first six months of 2021 were analyzed to provide information about temporary health care workers in New Hampshire's workforce.

Job Postings for Travel Healthcare Positions in New Hampshire



Source: Labor Insight, Emsi Burning Glass

¹ Cross Country Medical Staffing Network, 6 Reasons Why You Should Take A Per Diem Assignment. <https://www.crosscountrymsn.com/blogs/top-reasons-to-take-a-per-diem-assignment>.

² American Traveler, Travel Nursing: Frequently Asked Questions. <https://www.americantraveler.com/travel-nursing-career-faqs>.

³ Healthcare workers include two major occupational groups: healthcare practitioners and technical occupations and healthcare support occupations

Travel and Per-Diem Worker Occupations and Specializations

Job postings from January through June 2021 requested travel workers for a variety of healthcare occupations, although *registered nurses* were most common, accounting for almost 50 percent of all postings. *Licensed practical and licensed vocational nurses* and *nursing assistants* were also frequently requested, accounting for six and five percent of postings, respectively. In total, postings for travel positions requested workers for 60 different occupations, including physicians and a number of technician and technologist positions.

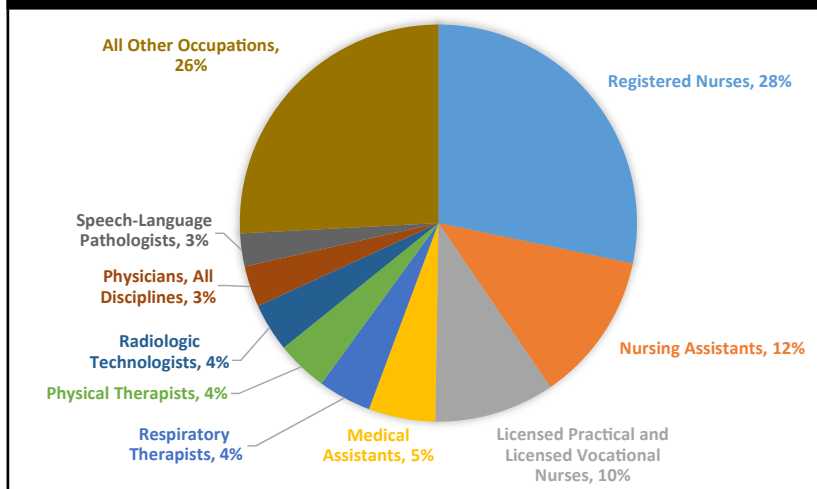
Among job postings requesting per-diem workers, *registered nurses* were also the most frequently requested, although they accounted for a smaller proportion of total postings, only 28 percent. Per-diem *nursing assistants* and *licensed practical and licensed vocational nurses* were frequently requested as well, accounting for twelve and ten percent of postings.

Job postings for travel *registered nurses* typically included a specialization, reflecting the different settings nurses work in, as well as the different types of patients they care for. Postings typically required at least one year of experience in the relevant specialization, to ensure that workers would be able to perform their work with minimal onboarding. The most requested specializations were all in hospital settings: intensive or critical care, operating room, medical-surgical, and emergency room nursing.⁴ Outside of hospitals, travel nurses were most commonly requested for home health care and hospice positions, two specializations that reflect the needs of New Hampshire’s growing older population.

Medical-surgical, intensive or critical care, and operating room nurses were frequently requested specializations in job postings for per-diem nurses as well. The most frequently requested specialization for per-diem nurses was clinical care management. Clinical care managers coordinate medical care and provide advocacy to help patients get the best and most affordable care; requests for per-diem clinical care managers came from both hospitals and home health care providers.⁵

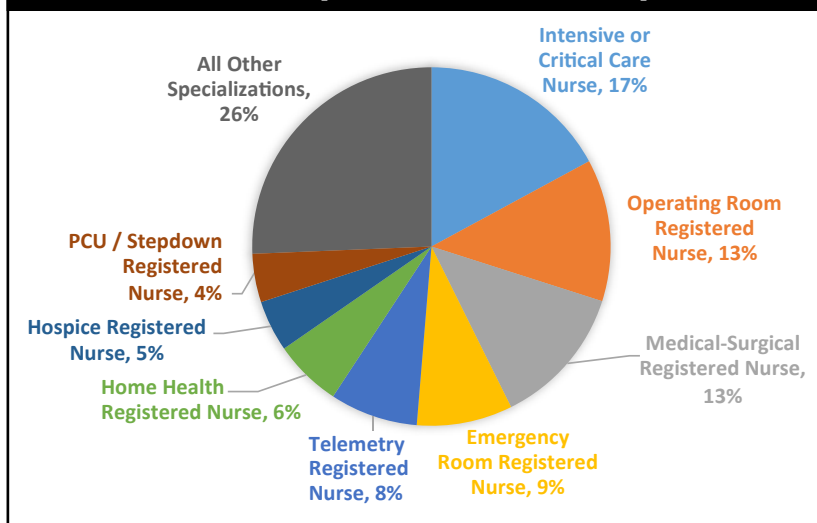
4 The health care industry includes three subsectors. Hospitals provide inpatient services, including general medical and surgical, psychiatric and substance abuse, and specialty hospital facilities. Ambulatory health care services provide outpatient services, including offices of physicians, outpatient care centers, medical and diagnostic laboratories, and home health care services. Nursing and residential care includes facilities that provide residential care combined with either nursing, supervisory, or other types of care.
5 Labor Insight, Emsi Burning Glass

Job Postings for Per-Diem Healthcare Positions in New Hampshire



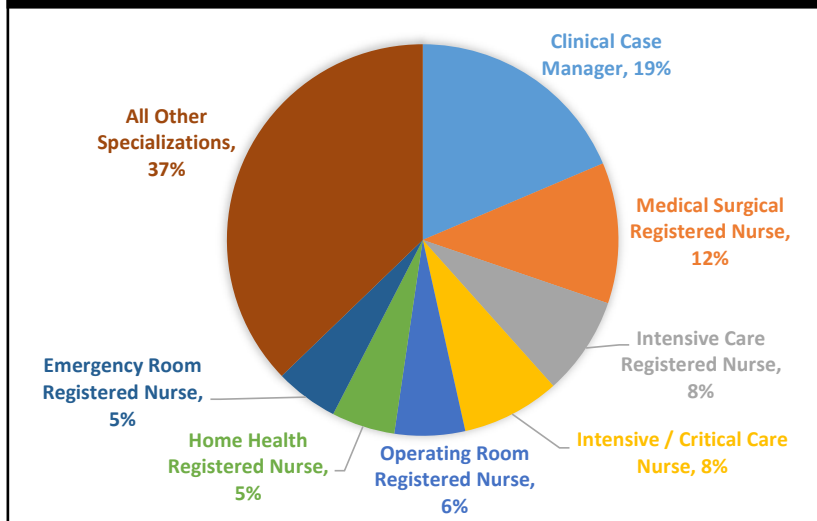
Source: Labor Insight, Emsi Burning Glass

Travel Nurse Specializations Requested



Source: Labor Insight, Emsi Burning Glass

Per-Diem Nurse Specializations Requested



Source: Labor Insight, Emsi Burning Glass

Industries Employing Travel and Per-Diem Workers

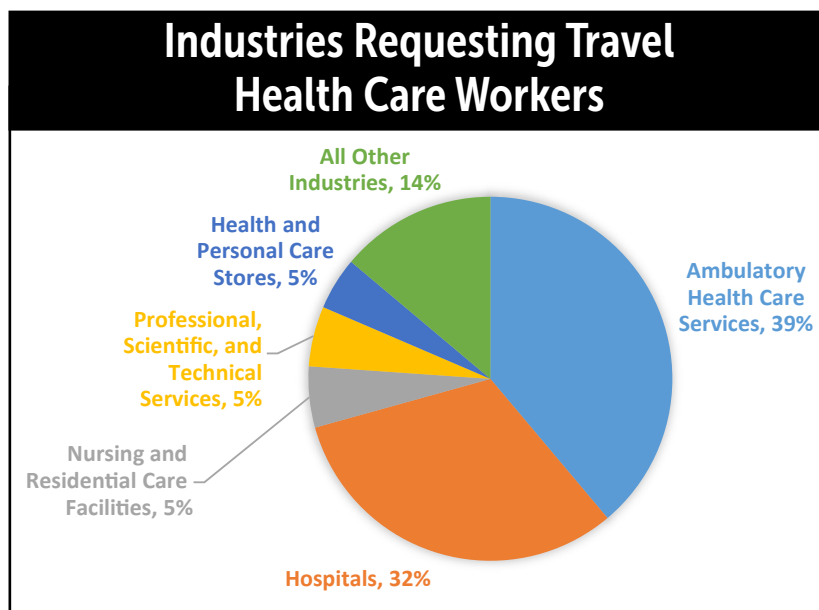
The majority of job postings for travel health care workers were from employers in ambulatory health care services and hospitals, which each accounted for more than 30 percent of postings.⁶ Nursing and residential care facilities accounted for five percent of postings, as did two industries outside of the health care and social assistance industry sector: professional, scientific and technical services (scientific research and development or consulting businesses) and health and personal care stores (primarily pharmacies located in retail stores). Most postings for travel workers in health and personal care stores were for either pharmacists or pharmacy technicians, and most postings in the professional, scientific and technical services industry were for technician and technologist positions.

Among job postings requesting per-diem workers, more than two-thirds were from hospitals, while nursing and residential care facilities accounted for 17 percent of postings, and ambulatory health care services accounted for 13 percent. Other industries accounted for just two percent of postings.

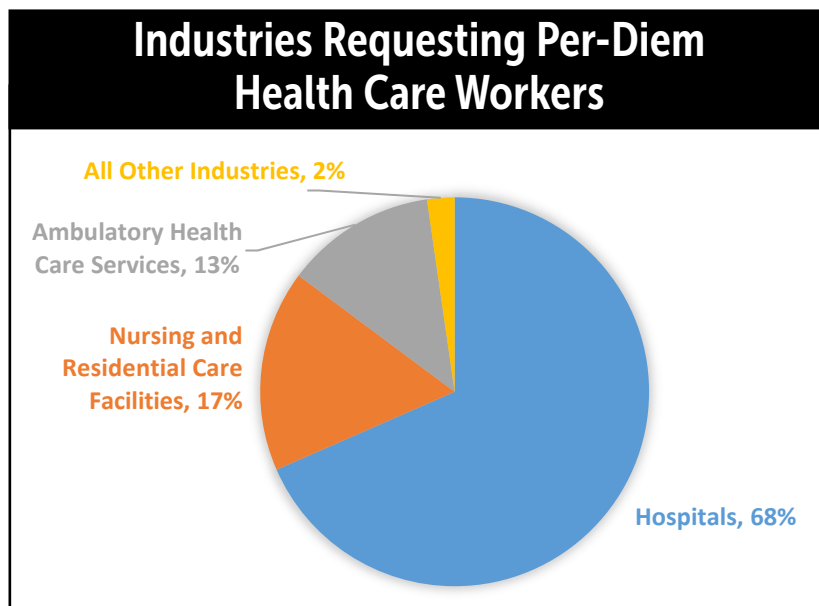
Temporary Labor to Fill Staffing Shortages

Although temporary healthcare workers are primarily intended to manage regular fluctuations in patient and staff levels, they can also be used to cover systemic labor shortages. As demand for health care services in New Hampshire increases, the industry has struggled to maintain a local workforce large enough to support its needs. A 2019 survey of 20 New Hampshire hospitals by the New Hampshire Hospital Association found that there were 2,035 vacancies out of a total of 21,427 positions, meaning nine percent of positions were not filled.⁷

Because so many positions have been difficult to fill, some health care employers have relied on staffing agencies to provide temporary labor to fill what would otherwise be permanent positions. Nursing and residential care facilities in particular report relying on staffing agencies and temporary staff to fill vacancies.⁸ This shortage is most severe for lower-paid workers, such as licensed nursing assistants (LNAs), who earned a median wage of \$16.38 per hour in New Hampshire in 2020.⁹



Source: Labor Insight, Emsi Burning Glass



Source: Labor Insight, Emsi Burning Glass

Since temporary workers are more expensive than permanent workers, relying on temporary workers puts a financial strain on employers. The *New Hampshire Bulletin* reported that in 2020, Rockingham County, which operates a rehabilitation and nursing center, as well as a county jail, paid staffing agencies \$3.7 million to fill vacant healthcare positions.¹⁰

Many long-term care facilities rely on Medicaid reimbursement to pay for the services they provide, and have less financial flexibility to increase staff pay in order to increase employee retention. As tight labor market

6 For classifying temporary health care worker job postings into industries, job posting data generally identified the health care facility requesting temporary staff, not the staffing agencies that directly employed travel and per-diem health care workers. As a result, most postings were included in the health care and social assistance industry sector, not the administrative and support services sector, which includes staffing agencies and other employment services. Not all job postings identified end clients, in these cases, postings were categorized in the health care and social assistance sector, but more specific industry subsector information was not available.

7 Plenda, Melanie, "Health-Care Staffing: Feast or Famine," *BusinessNH Magazine*. <https://www.businessnhmagazine.com/article/health-care-staffing-feast-or-famine>.

8 Covenno, Amy, "New Hampshire long-term care facilities face 'huge' staffing shortage," *WMUR*. <https://www.wmur.com/article/new-hampshire-long-term-care-facility-staffing-crisis/37259507#>.

9 New Hampshire Employment Security, Occupational Employment and Wage Statistics, June 2020.

10 Timmins, Annmarie, "As health care workforce shortage persists, employers boost incentives," *The New Hampshire Bulletin*. <https://newhampshirebulletin.com/2021/07/02/as-health-care-workforce-shortage-persists-employers-boost-incentives/>.

conditions in 2021 have increased wages in some industries, long-term care facilities report many lower-wage health care workers are leaving the industry for more lucrative work.¹¹

To attract more workers into LNA positions, the New Hampshire Health Care Association created the NH Needs Caregivers initiative. This initiative, intended to train as many as 700 individuals to work as LNAs in nursing homes, offers tuition reimbursement, covers licensing costs, and pays a \$500 retention bonus after six months.¹² There were an estimated 8,100 LNAs employed in New Hampshire in 2019, so an additional 700 LNAs would represent a nine percent increase.

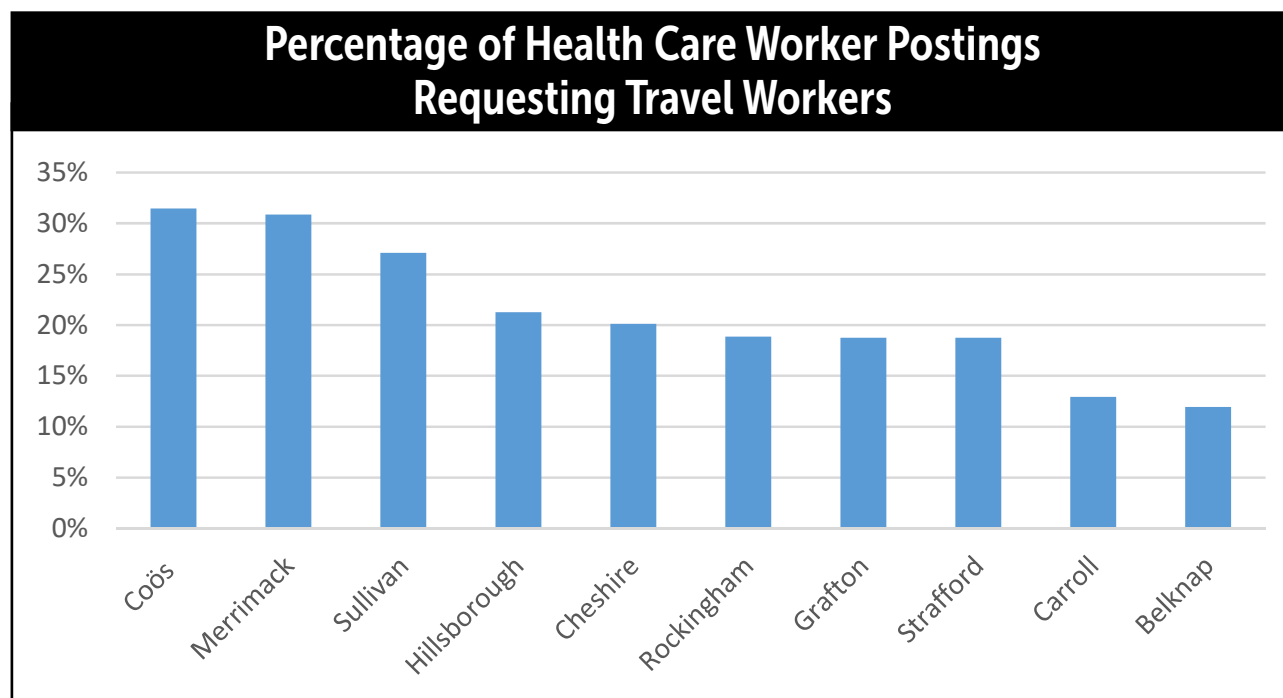
Location of Temporary Positions

Overall, 21 percent of all health care job postings in New Hampshire were for travel workers, although this percentage varied by county. Coös and Merrimack counties had the highest percentage, with 31 percent of postings requesting travel workers, followed by Sullivan County with 27 percent. The relatively high percentage of travel worker postings may suggest that the shortage for health care

workers is particularly high in these areas. Coös and Sullivan counties are largely rural, and they are two of the oldest four counties in New Hampshire; approximately one-quarter of the population in Coös and Sullivan counties is age 65 or older. Both of these factors contribute to health care worker shortages. The only hospital in Sullivan County, in Claremont, is located near Dartmouth-Hitchcock Medical Center and the White River Junction VA Medical Center in Vermont, and must compete for workers with these larger facilities.

Relative to the size of its workforce, Merrimack County has greater demand for health care workers than most of New Hampshire, which likely contributes to the shortage of workers in this county. In 2019, 20 percent of private employment in Merrimack County was in the health care and social assistance sector. Only Grafton County, home to Dartmouth-Hitchcock Medical Center, had a higher percentage of health care employment.

– Greg David, Economist



Source: Labor Insight, Emsi Burning Glass

¹¹ Covenno, op. cit.

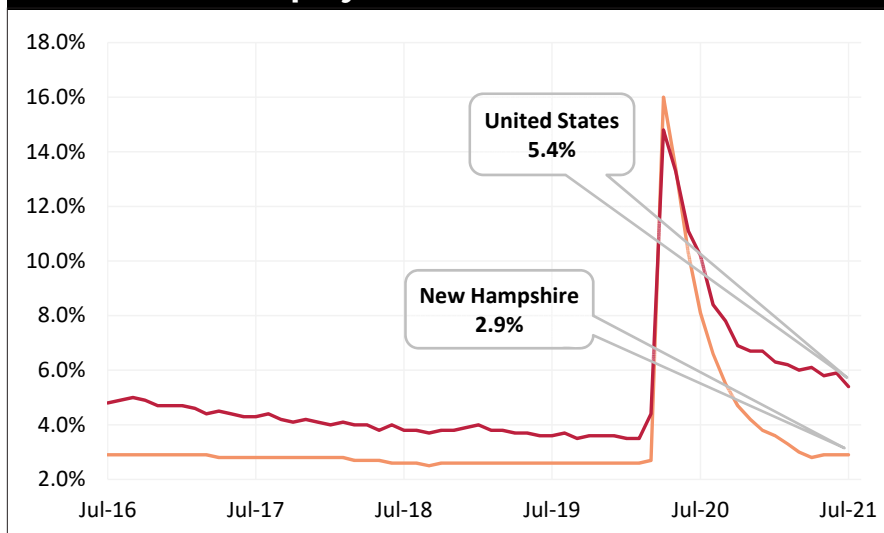
¹² NH Needs Caregivers, <https://nhneeds caregivers.org/about/>

SEASONALLY ADJUSTED ESTIMATES

Unemployment Estimates by Region

Seasonally Adjusted	Jul-21	Jun-21	Jul-21
United States	5.4%	5.9%	10.2%
Northeast	6.6%	6.8%	12.8%
New England	5.2%	5.3%	10.1%
Connecticut	7.3%	7.7%	11.3%
Maine	4.9%	4.8%	8.8%
Massachusetts	4.9%	4.9%	9.8%
New Hampshire	2.9%	2.9%	8.1%
Rhode Island	5.8%	5.9%	14.0%
Vermont	3.0%	3.1%	6.4%
Mid Atlantic	7.2%	7.3%	13.8%
New Jersey	7.3%	7.2%	13.1%
New York	7.6%	7.7%	14.7%
Pennsylvania	6.6%	6.9%	13.0%

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



Current Employment Statistics (CES) by Place of Establishment

	Number of Jobs			Change From Previous	
	Jul-21	Jun-21	Jul-20	Month	Year
Total Nonfarm	658,900	653,900	624,300	5,000	34,600
Total Private	572,600	569,900	539,000	2,700	33,600
Mining and Logging	900	1,000	900	-100	0
Construction	27,000	27,600	27,500	-600	-500
Manufacturing	66,900	66,800	65,500	100	1,400
Durable Goods	50,000	49,900	49,200	100	800
Non-Durable Goods	16,900	16,900	16,300	0	600
Trade, Transportation, and Utilities	137,500	136,800	132,300	700	5,200
Wholesale Trade	27,800	27,800	27,200	0	600
Retail Trade	89,600	90,000	88,400	-400	1,200
Transportation, Warehousing, and Utilities	20,100	19,000	16,700	1,100	3,400
Information	12,000	11,600	11,400	400	600
Financial Activities	33,900	33,900	33,600	0	300
Financial and Insurance	27,400	27,400	27,300	0	100
Real Estate and Rental and Leasing	6,500	6,500	6,300	0	200
Professional and Business Services	84,100	83,700	79,800	400	4,300
Professional, Scientific, and Technical Services	40,500	40,200	39,000	300	1,500
Management of Companies and Enterprises	9,600	9,500	8,800	100	800
Administrative and Support and Waste Management and Remediation Services	34,000	34,000	32,000	0	2,000
Education and Health Services	119,100	118,900	115,300	200	3,800
Educational Services	27,700	27,900	26,900	-200	800
Health Care and Social Assistance	91,400	91,000	88,400	400	3,000
Leisure and Hospitality	68,000	66,700	51,000	1,300	17,000
Arts, Entertainment, and Recreation	12,900	13,000	7,300	-100	5,600
Accommodation and Food Services	55,100	53,700	43,700	1,400	11,400
Other Services	23,200	22,900	21,700	300	1,500
Government	86,300	84,000	85,300	2,300	1,000
Federal Government	8,100	8,100	8,200	0	-100
State Government	22,900	22,900	22,500	0	400
Local Government	55,300	53,000	54,600	2,300	700

Current month is preliminary; past months are revised

Prior data and area data are available on our website at: www.nhes.nh.gov/elmi/statistics/ces-htm

NOT SEASONALLY ADJUSTED ESTIMATES BY PLACE OF RESIDENCE

Labor Force Estimates

New Hampshire	Jul-21	Jun-21	Jul-20
Total Civilian Labor Force	760,730	750,040	770,340
Employed	734,640	726,610	707,720
Unemployed	26,090	23,430	62,620
Unemployment Rate	3.4%	3.1%	8.1%

United States (# in thousands)	Jul-21	Jun-21	Jul-20
Total Civilian Labor Force	162,817	162,167	161,374
Employed	153,596	152,283	144,492
Unemployed	9,221	9,883	16,882
Unemployment Rate	5.7%	6.1%	10.5%

Unemployment Rates by Area

Counties	Jul-21	Jun-21	Jul-20
Belknap	3.4%	3.1%	7.8%
Carroll	3.3%	3.3%	8.4%
Cheshire	4.0%	3.6%	7.7%
Coös	4.0%	3.8%	8.9%
Grafton	3.4%	3.1%	7.1%
Hillsborough	3.5%	3.2%	8.6%
Merrimack	3.1%	2.9%	7.1%
Rockingham	3.4%	3.0%	8.5%
Strafford	3.3%	3.0%	8.0%
Sullivan	3.3%	3.1%	6.5%

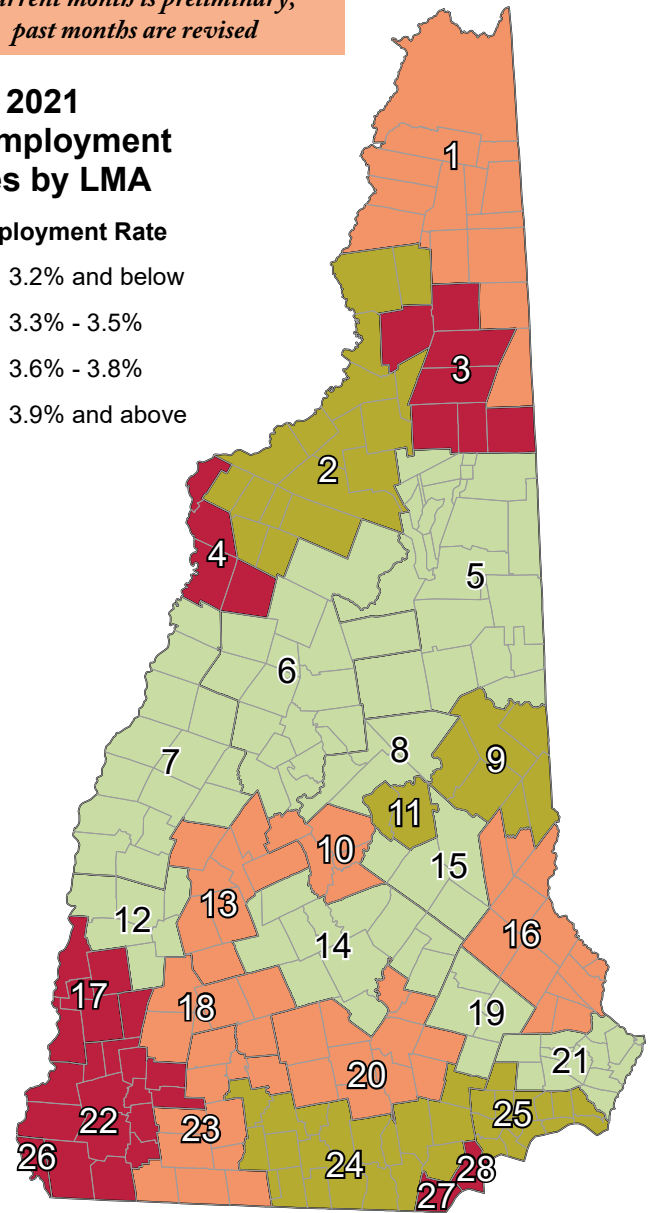
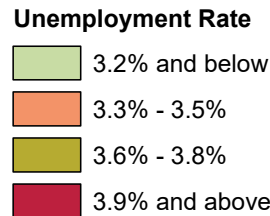
Map Key	Labor Market Areas	Jul-21	Jun-21	Jul-20
1	Colebrook, NH-VT LMA, NH Portion	3.5%	3.4%	6.6%
2	Littleton, NH-VT LMA, NH Portion	3.6%	3.3%	9.2%
3	Berlin NH Micropolitan NECTA	4.5%	4.3%	9.4%
4	Haverhill, NH LMA	4.3%	3.7%	7.0%
5	Conway, NH-ME LMA, NH Portion	3.1%	3.2%	8.9%
6	Plymouth, NH LMA	3.1%	2.9%	8.0%
7	Lebanon, NH-VT Micropolitan NECTA, NH Portion	3.2%	3.0%	5.4%
8	Meredith, NH LMA	3.1%	2.9%	6.9%
9	Wolfeboro, NH LMA	3.6%	3.5%	8.0%
10	Franklin, NH LMA	3.5%	3.3%	8.8%
11	Laconia, NH Micropolitan NECTA	3.7%	3.5%	8.7%
12	Expanded Claremont, NH estimating area	3.2%	2.9%	6.8%
13	New London, NH LMA	3.3%	2.9%	6.3%
14	Concord, NH Micropolitan NECTA	3.0%	2.8%	6.8%
15	Belmont, NH LMA	3.2%	3.0%	7.2%
16	Dover-Durham, NH-ME Metropolitan NECTA, NH Portion	3.3%	3.0%	8.0%
17	Charlestown, NH LMA	4.4%	4.0%	7.0%
18	Hillsborough, NH LMA	3.4%	3.2%	9.0%
19	Raymond, NH LMA	2.9%	2.6%	7.3%
20	Manchester, NH Metropolitan NECTA	3.4%	3.1%	8.3%
21	Portsmouth, NH-ME Metropolitan NECTA, NH Portion	2.9%	2.7%	7.5%
22	Keene, NH Micropolitan NECTA	3.9%	3.5%	7.9%
23	Peterborough, NH LMA	3.3%	3.0%	7.0%
24	Nashua, NH-MA NECTA Division, NH Portion	3.6%	3.2%	8.7%
25	Seabrook-Hampstead Area, NH Portion, Haverhill-Newburyport-Amesbury MA-NH NECTA Division	3.8%	3.3%	9.6%
26	Hinsdale Town, NH Portion, Brattleboro, VT-NH LMA	7.6%	6.4%	10.4%
27	Pelham Town, NH Portion, Lowell-Billerica-Chelmsford, MA-NH NECTA Division	4.2%	3.5%	10.7%
28	Salem Town, NH Portion, Lawrence-Methuen-Salem, MA-NH NECTA Division	4.2%	3.8%	10.4%

Unemployment Rates by Region

Not Seasonally Adjusted	Jul-21	Jun-21	Jul-21
United States	5.7%	6.1%	10.5%
Northeast	6.8%	6.6%	13.0%
New England	5.6%	5.5%	10.2%
Connecticut	6.9%	6.8%	11.5%
Maine	5.0%	5.1%	8.4%
Massachusetts	5.7%	5.4%	10.1%
New Hampshire	3.4%	3.1%	8.1%
Rhode Island	5.8%	5.8%	13.8%
Vermont	3.2%	3.6%	6.6%
Mid Atlantic	7.2%	7.1%	14.1%
New Jersey	7.6%	7.9%	13.6%
New York	7.4%	7.2%	14.8%
Pennsylvania	6.7%	6.4%	13.5%

*Current month is preliminary;
past months are revised*

**July 2021
Unemployment Rates by LMA**



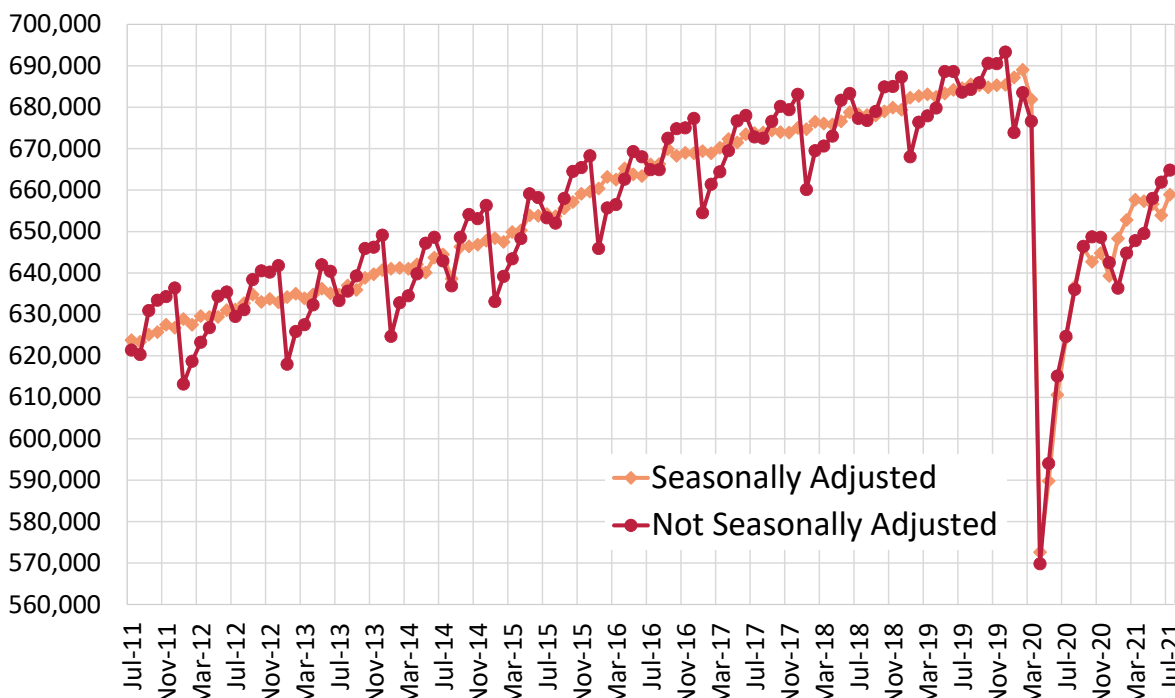
MONTHLY ESTIMATES BY PLACE OF ESTABLISHMENT

**New Hampshire Nonfarm Employment Statewide
Not Seasonally Adjusted**

*Current month
is preliminary;
past months
are revised*

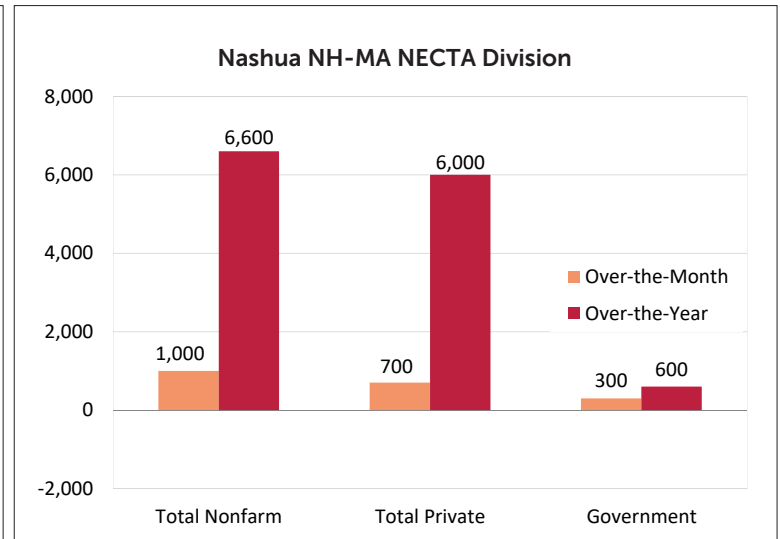
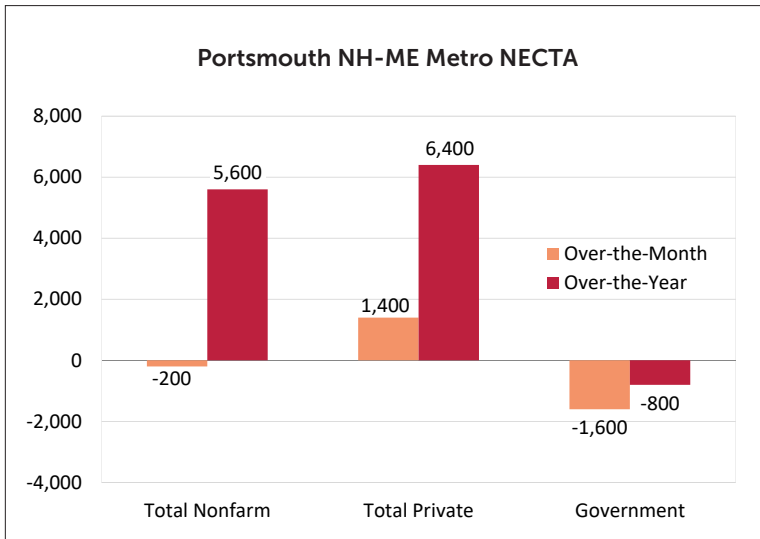
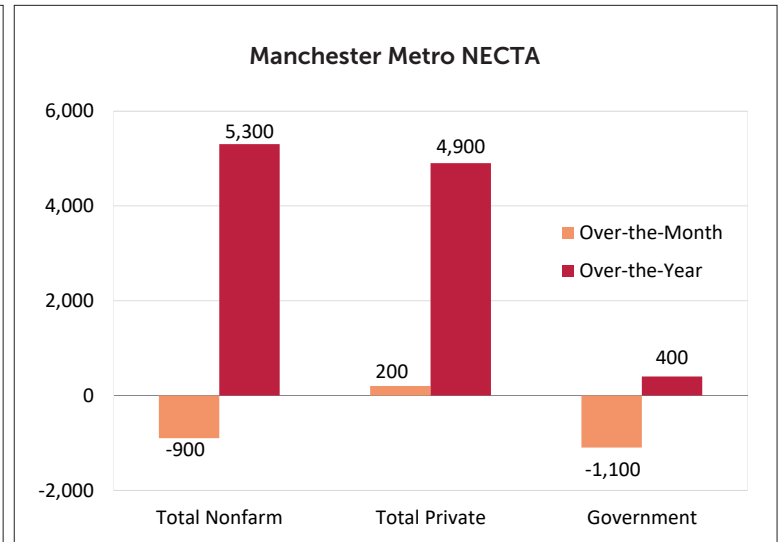
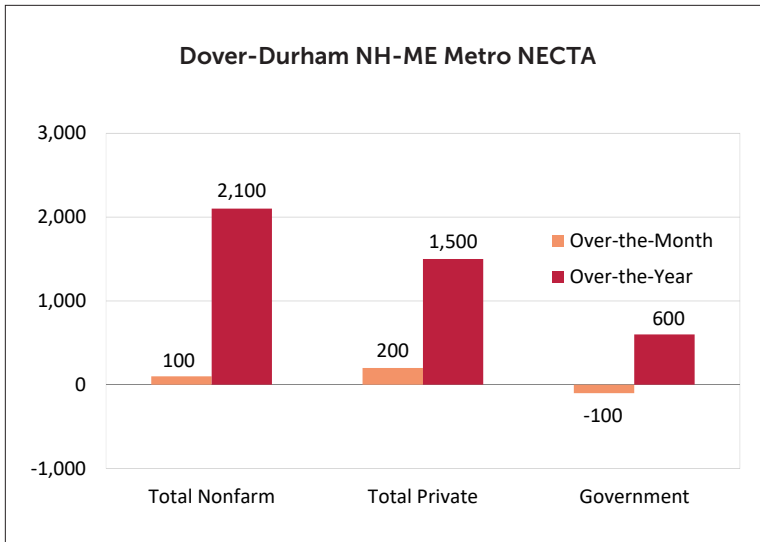
	Number of Jobs			Change From Previous	
	Jul-21	Jun-21	Jul-20	Month	Year
Total Nonfarm	664,800	661,900	624,700	2,900	40,100
Total Private	589,400	582,100	550,600	7,300	38,800
Mining and Logging	1,000	1,000	1,000	0	0
Construction	28,300	28,500	28,600	-200	-300
Manufacturing	67,200	67,500	66,100	-300	1,100
Durable Goods	50,200	50,400	49,600	-200	600
Non-Durable Goods	17,000	17,100	16,500	-100	500
Trade, Transportation, and Utilities	138,900	138,900	132,800	0	6,100
Wholesale Trade	27,800	27,700	27,400	100	400
Retail Trade	91,600	91,900	89,300	-300	2,300
Transportation, Warehousing, and Utilities	19,500	19,300	16,100	200	3,400
Information	12,100	11,600	11,600	500	500
Financial Activities	34,200	34,000	34,100	200	100
Professional and Business Services	85,200	84,400	81,400	800	3,800
Education and Health Services	117,800	118,000	110,500	-200	7,300
Leisure and Hospitality	80,900	74,800	62,000	6,100	18,900
Other Services	23,800	23,400	22,500	400	1,300
Government	75,400	79,800	74,100	-4,400	1,300
Federal Government	8,100	8,100	8,200	0	-100
State Government	20,200	20,000	20,400	200	-200
Local Government	47,100	51,700	45,500	-4,600	1,600

Total Nonfarm Employment Trend Through July 2021

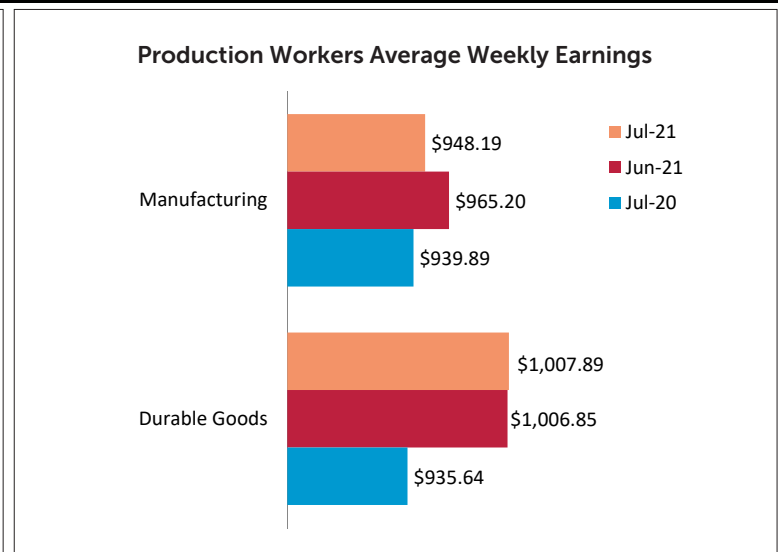
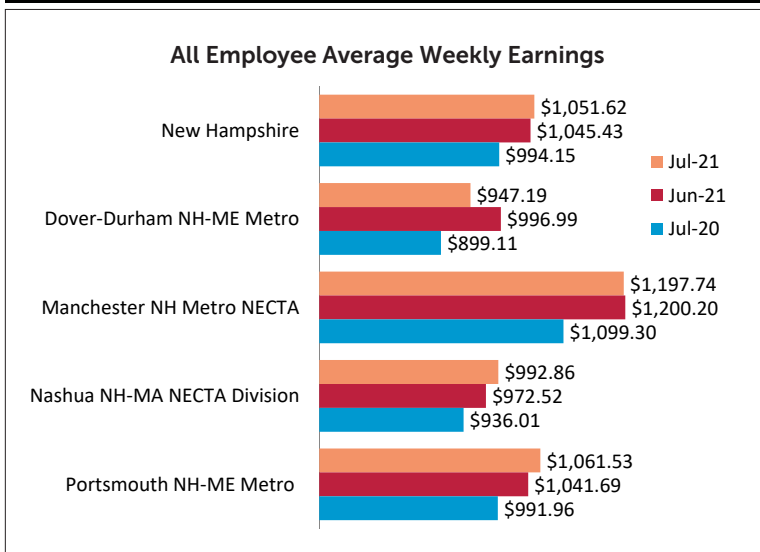


MONTHLY ESTIMATES BY PLACE OF ESTABLISHMENT

Nonfarm Employment by Metropolitan Statistical Areas - July 2021



Total Private Average Weekly Earnings Data



Sector data for the four areas and hours earnings data are available on our website: www.nhes.nh.gov/elmi/statistics/ces-data.htm

MONTHLY ANALYSIS OF CURRENT EMPLOYMENT STATISTICS (CES)

Seasonally Adjusted

Total nonfarm employment increased to 658,900 jobs in July, based on preliminary seasonally adjusted estimates. This was an increase of 5,000 non-farm jobs over the month, as private industries gained 2,700 jobs and Government employment increased by 2,300. Seven private industry supersectors experienced over-the-month employment gains, two experienced over-the-month employment losses and one was unchanged from June to July. Seasonally adjusted over-the-month changes reflect the number of jobs that are not attributable to a regular seasonal pattern of employment variability.

The *leisure and hospitality* supersector increased employment by 1,300 over the month, after the seasonal adjustment. *Trade, transportation, and utilities* added 700 jobs in July, while *information* and *professional and business services* each added 400 positions. The *other services* supersector gained 300 jobs while *private education and health services* expanded payrolls by 200 and manufacturing added 100 positions.

Financial activities employment was unchanged from June to July 2021. *Mining and logging* employment decreased by 100 over the month, while *construction* employment decreased by 600 after the seasonal adjustment.

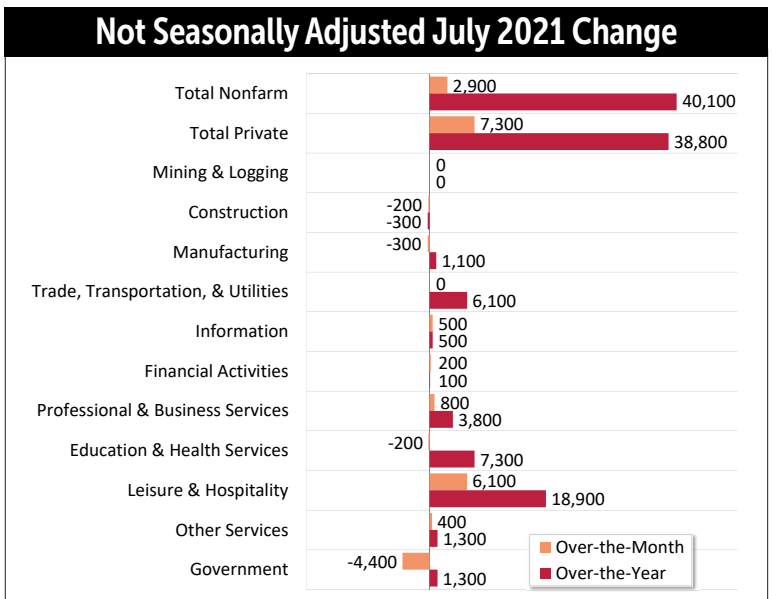
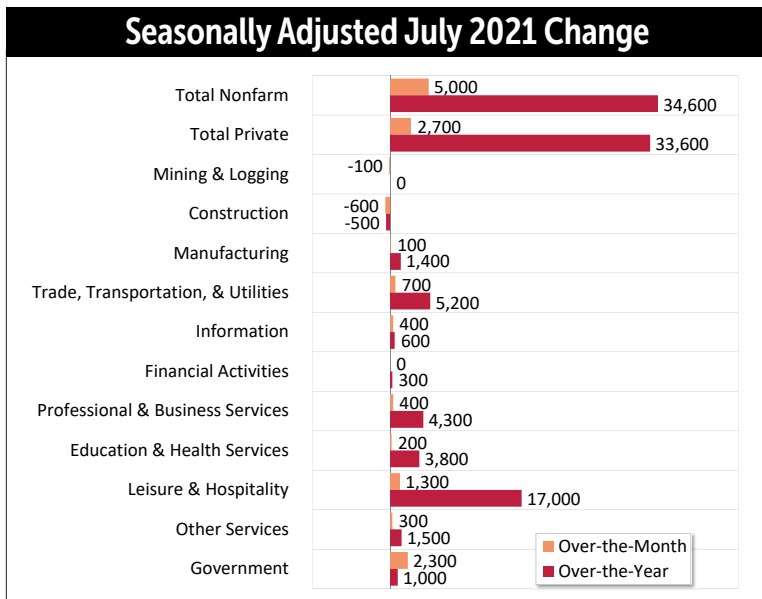
Total nonfarm employment in July 2021 remained 30,100 jobs below the pre-pandemic level in February 2020. All supersectors remained below pre-pandemic levels, with *private education and health services* employment at 7,500 jobs below the February 2020 level.

Not Seasonally Adjusted

Preliminary unadjusted estimates for July 2021 show that total nonfarm employment increased by 40,100 jobs since July 2020, reflecting the ongoing employment recovery from the coronavirus (COVID-19) pandemic. Over-the-year employment gains were experienced in all but two supersectors. *Mining and logging* employment was unchanged over the year, while *construction* employment decreased by 300 compared to July 2020.

Leisure and hospitality experienced the largest increase, with 18,900 more jobs than in July 2020. *Private education and health services* employment increased by 7,300 positions, while *trade, transportation, and utilities* expanded payrolls by 6,100. The *professional and business services* supersector gained 3,800 positions, while *other services* employment increased by 1,300. *Manufacturing* added 1,100 jobs over the year, *information* expanded payrolls by 500 and *financial activities* gained 100 jobs. *Government* employment increased by 1,300 from July 2020 to July 2021, due to gains within the local government education services component.

– Robert Cote, Research Analyst

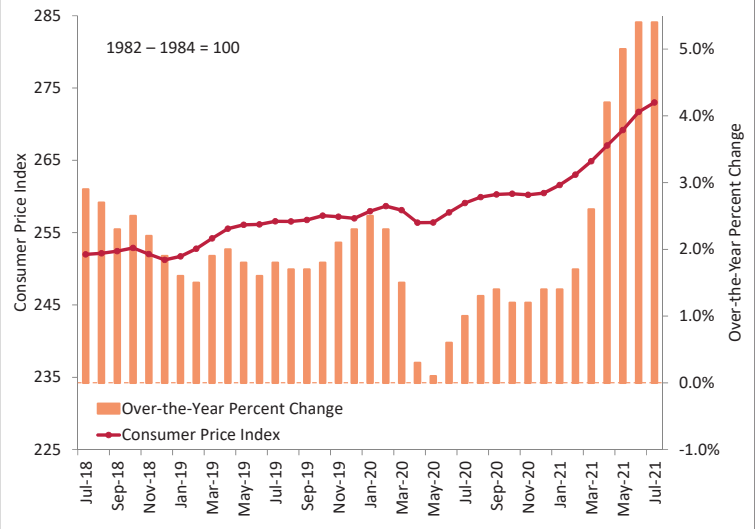


Consumer Price Index

United States, All Urban Consumers Not Seasonally Adjusted (CPI-U) (1982-1984=100)				
			Change From Previous	
Jul-21	Jun-21	Jul-20	Month	Year
273.003	271.696	259.101	0.5%	5.4%

Northeast, All Urban Consumers Not Seasonally Adjusted (CPI-U) (1982-1984=100)				
			Change From Previous	
Jul-21	Jun-21	Jul-20	Month	Year
285.220	284.741	273.347	0.2%	4.3%

Consumer Price Index United States, All Urban Consumers



Unemployment Compensation Claims Activity

	Feb-21	Mar-21	Apr-21	May-21	Jun-21	Jul-21
Initial Claims	16,063	15,463	15,183	4,509	3,572	4,642
Continued Weeks Claimed	56,446	59,313	42,412	34,672	27,828	27,111
Average payment for a week of unemployment	\$280.24	\$277.26	\$277.35	\$280.49	\$294.78	\$285.06

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