

ECONOMIC CONDITIONS in New Hampshire



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Changes in Educational Program Completers Looking Back to 1985.....4

Should Economic Conditions be changed? - The readers response!7

Local Area Unemployment Statistics.....8

Current Employment Statistics9

For Additional Information12



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Educational Program Completers Women Outnumber Men in Most Programs

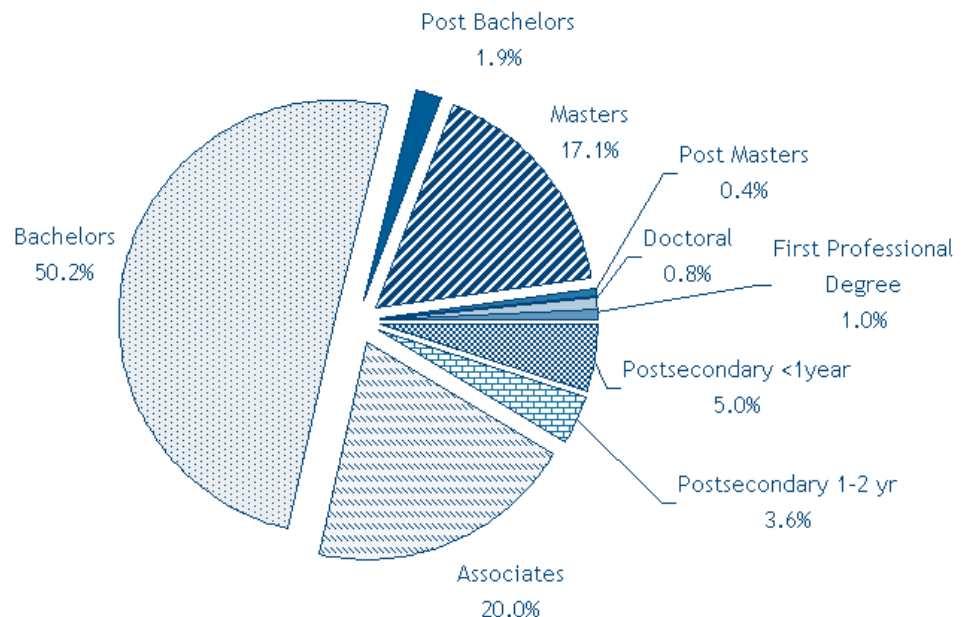
Fall is just around the corner, and that means students are starting a new semester of classes. Decisions are made about majors, with the hope that their college career will prepare them for the world of work. Although it will be a year or so until statistics are available for the class of 2005, recently released statistics on the class of 2004 spotlight the programs currently offered by New Hampshire postsecondary institutions and the degrees and certificates awarded by them.

Postsecondary institutions in New Hampshire granted 16,578

awards in the academic year ending in 2004. Fifty percent of awards were Bachelor's degrees and another twenty percent were Associate's degrees. Nationally, 41 percent of all postsecondary awards were Bachelor's degrees and 19 percent were Associate's degrees. Consequently, New Hampshire has a larger share of completers with a Bachelor's degree than the nation. On the other hand, the state has a smaller share of completers with one- and two-year postsecondary certificates. Combined, these certificates account for less than ten percent of degrees awarded in the state, compared to 19 percent nationally.

Continued on page 2

Half of all postsecondary awards in New Hampshire in 2004 were Bachelor's degrees



Source: National Center for Education Statistics

Continued from page 1

Women completing programs at New Hampshire institutions outnumbered men by a wide margin: 10,123 women in 2004 compared to 6,455 men, giving women 61 percent of all postsecondary awards. That is consistent with the US as a whole, where 59 percent of completers are women and 41 percent are men. There are more women completers at every award level in the state, except for doctoral and first professional degrees where completers are equally divided. These programs, however, have relatively few total completers.

One reason for the wide discrepancy is that schools in New Hampshire offer many programs at the one- or two-year certificate level in subject areas that traditionally have higher female enrollment. Cosmetology completers alone accounted for sixty percent of all one- to two-year certificates while medical and clinical assisting completers accounted

for nearly 15 percent of all postsecondary certificates of less than one year. Other programs at these levels with mostly female completers include massage therapy, and esthetics/skin care. Another certificate level program with a majority of female completers is special education, targeted at current teachers seeking to expand their skills or at students considering a career in the field.

In all one- to two-year certificate programs, women accounted for 94 percent of completers, while in one-year programs women accounted for 77 percent.

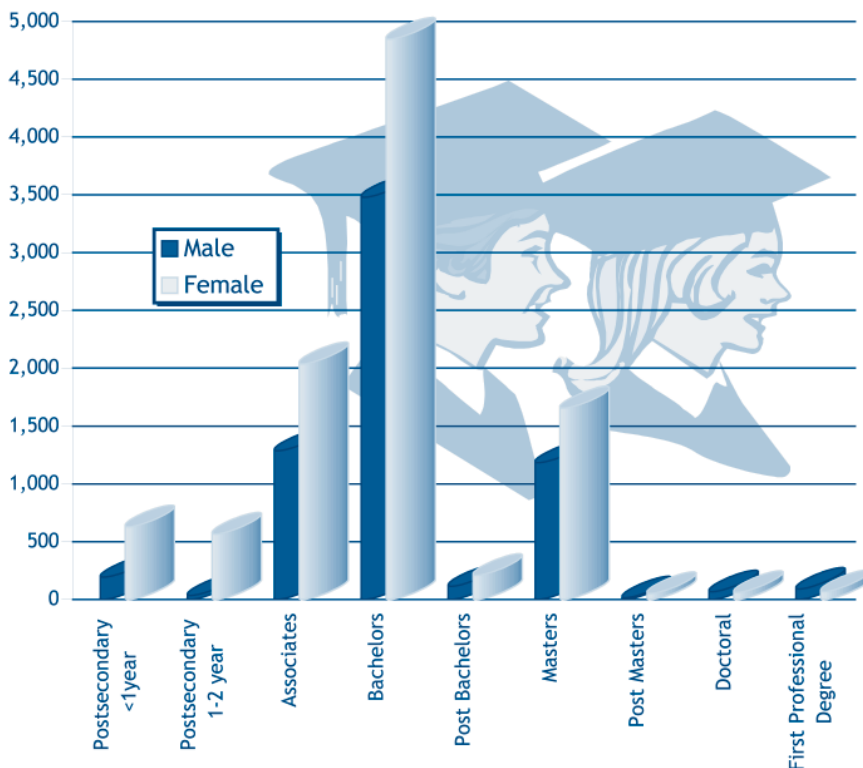
Programs at the certificate levels with more male completers include computer programming, computer science, information technology, and computer systems networking and telecommunications. However, none of these programs had more than 25 completers from New Hampshire institutions in 2004.

Graduation rates can account for some of the disparity. According to the National Center for Education Statistics, the graduation rate for men in four-year programs (1996 cohort year) was 61.7 percent compared to 63.6 for women. In less-than-four-year programs, the split was more visible, 39.9 percent for men and 49.7 percent for women. Other factors that may contribute to the higher female completions is that young men often enter the workplace directly from high school and are more likely to enter the military. Men may also participate in career and technical programs in high schools or in apprenticeship programs where completers are not reflected in postsecondary totals.

At the Associate's degree level, women are the recipients of more awards than men are by a margin of 61 percent to 39 percent, both in New Hampshire

Continued on page 3

In 2004, female completers in New Hampshire outnumbered males by a wide margin at most training levels



Source: National Center for Education Statistics

and for the nation. The most popular program for Associate's degree recipients is registered nursing, with 305 women earning degrees compared to only 32 men. Women also lead in the number of completers at this award level for accounting, liberal arts, and legal assistant/paralegal. Some Associate's degree programs in which men outnumber women completers are culinary arts, criminal justice/law enforcement administration, and commercial and advertising art.

The gender difference is not as pronounced at the Bachelor's degree level, where women hold a 58 to 42 percent edge and account for the majority of completers in programs such as psychology, English language and literature, communication studies, and elementary education. General business administration and management, the most popular degree at the Bachelor's level, is almost evenly divided by gender, with 568 male and 601 female graduates.

Bachelor's programs with higher numbers of male completers in New Hampshire include economics, mechanical engineering, sport and fitness administration, and political science. Programs in computers and information science and support services, which encompass more than twenty specific programs, had the vast majority of male completers, with 255 graduates out of 325.

Michael Argiropolis

Recently released statistics on completers (graduates) of postsecondary educational programs are based on the latest data collected and analyzed by the National Center for Education Statistics, a federal entity within the U.S. Department of Education.

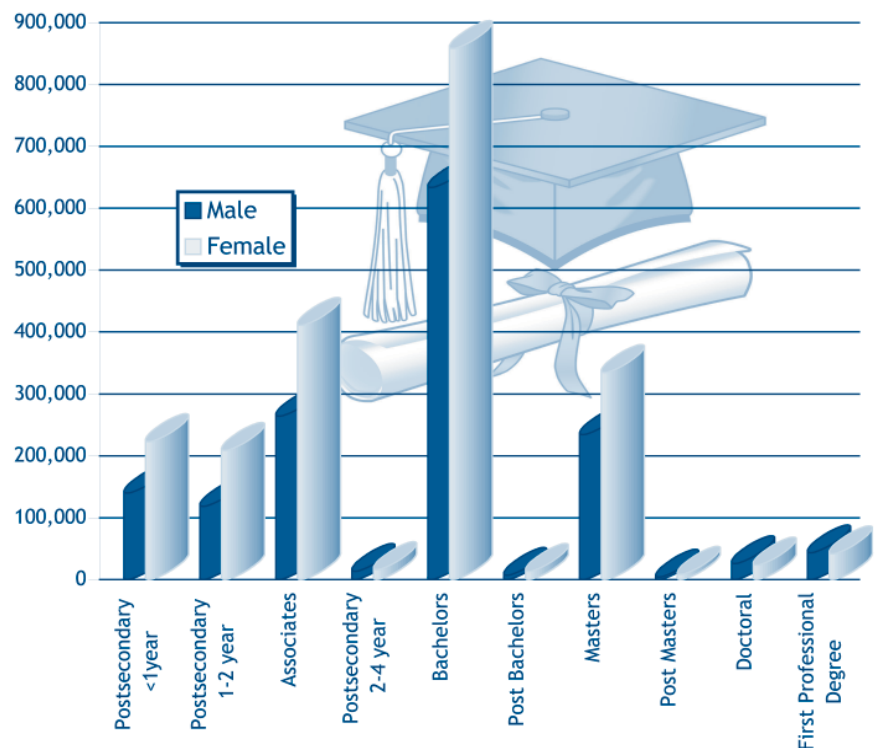
Completers are tallied separately for each level of education, starting with programs that require less than one year of study to first professional degrees. Completers are at educational institutions located in New Hampshire. Some institutions affiliated with schools based in other states do not report completers separately for New Hampshire.

Not all schools are required to report completers. Some proprietary schools that specialize in specific vocational training do not have their completers included in these totals.

Programs are defined by a Classification of Instructional Programs (CIP) which describes more than 1,400 programs of study.

Continued from page 2

In 2004, there was also a gap between male and female completers for the United States as a whole



Source: National Center for Education Statistics

Changes in Educational Program Completers Looking Back to 1985

Students packing for classes in the fall of 1984 likely included a Walkman, calculator, typewriter and some change to call home on occasion. Personal computers, if one could afford them at all, were too heavy to lug around and nobody had a cell phone or an iPod. Despite these “hardships,” students prepared for the world of work, hoping that their chosen field of study would prepare them for the challenges ahead.

Some of the most popular programs in that year still attract students in 2004. Business and management degrees continue to be one of the most popular options, particularly at the Bachelor’s degree level. Other programs, especially in healthcare, have increased the number of graduates, mainly in one- and two-year certificate programs.

Here’s a look at the numbers as reported by the National Center for Educational Statistics for the graduating classes of 1985 compared to 2004:

A total of 10,772 postsecondary awards were granted by New Hampshire institutions in 1985. In 2004, the number of completers was 16,578, a gain of 53.9 percent.

The total number of Associate’s degrees granted by New Hampshire institutions in 1985 was 2,619 compared to 3,322 in 2004, an increase of 26.8 percent.

The total number of Bachelor’s degrees granted by New Hampshire institutions in 1985 was 6,313 compared to 8,326 in 2004, an increase of 31.9 percent.

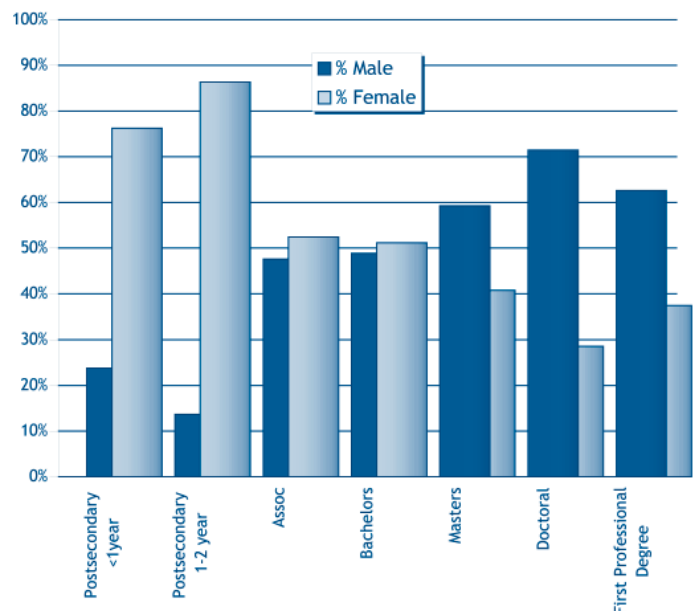
More graduates earned Bachelor’s degrees in business than in any other program. Two programs, general business administration and management with 795 graduates, and a separate program,

Continued on page 5

| Top 10 Bachelor's Degree Programs in New Hampshire, 2004 | Completers |
|---|------------|
| General Business Administration and Management | 1,169 |
| Psychology, General | 491 |
| English Language and Literature, General | 453 |
| Communication Studies/ Speech Communication and Rhetoric | 335 |
| Political Science and Government, General | 315 |
| Economics, General | 237 |
| History, General | 236 |
| Sociology | 231 |
| Elementary Education and Teaching | 183 |
| General Biology/Biological Sciences | 173 |

| Top 10 Bachelor's Degree Programs in New Hampshire, 1985 | Completers |
|--|------------|
| Business Admin. And Management, General | 795 |
| Computer and Information Science, General | 346 |
| Political Science and Government | 309 |
| Business and Management, General | 304 |
| Psychology, General | 291 |
| English, General | 289 |
| Economics | 227 |
| Marketing Management | 170 |
| History | 166 |
| Elementary Education | 135 |

In 1985, more females than males completed postsecondary programs at most training levels



Source: National Center for Education Statistics

general business and management added 304 more completers. Preparing for a career in business is as popular today; the Bachelor's degree with the most completers is general business administration and management, with 1,169 completers.

Specialized business programs, including accounting and marketing seem to be losing favor - marketing baccalaureate degrees declined from 170 to 80, while accounting degrees increased only slightly, from 111 to 114. Criminal justice degrees at the Bachelor's level were few in 1985, with only 36 completers compared to 90 in 2004. The popularity of the criminal justice field may be spurred by popular forensic and criminal television dramas.

Some programs are perennially popular; political science, economics, English, and history graduates made the list of top ten completers in both 1985 and 2004. The reason is that all these programs are general in nature. Interestingly, the number of graduates at the

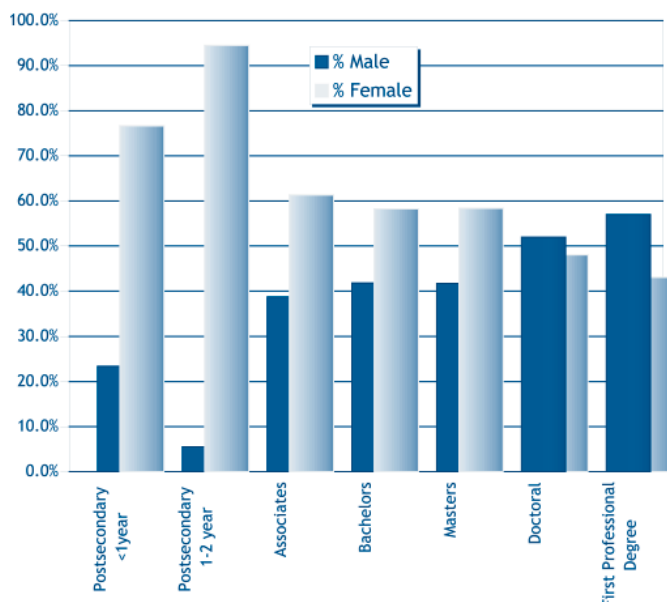
Bachelor's level in political science and economics is about the same in 2004 as it was in 1984. But as the number of completers at the Bachelor's level have risen by more than 30 percent, there has in relative terms been a decline in the popularity of these two programs.

Computer and information sciences programs have changed substantially since 1985. In the 2000 edition of the Classification of Instructional Programs (CIP), new program definitions were added to accommodate entirely new areas of study in networking, Internet applications and other technologies that did not exist in 1985. Consequently, it is impossible to directly compare specific programs between then and now. As a general benchmark, the total number of

Continued from page 4

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By 2004, the gap was even wider in the trend of more women completers than men



Source: National Center for Education Statistics

| Top 10 Associate's Degree Programs in New Hampshire, 2004 | Completers |
|---|------------|
| Nursing - Registered Nurse Training (RN, ASN, BSN, MSN) | 337 |
| Business Administration and Management, General | 324 |
| Culinary Arts/Chef Training | 203 |
| Accounting | 154 |
| Criminal Justice/Law Enforcement Administration | 153 |
| Liberal Arts and Sciences/Liberal Studies | 143 |
| Business/Commerce, General | 140 |
| Commercial and Advertising Art | 89 |
| Legal Assistant/Paralegal | 85 |
| Liberal Arts & Sciences, General Studies & Humanities | 77 |

| Top 10 Associate's Degree Programs in New Hampshire, 1985 | Completers |
|---|------------|
| Liberal Arts and Sciences | 339 |
| Business Admin. And Management, General | 205 |
| Computer Electronics | 121 |
| Computer and Information Science, General | 110 |
| Electronic Technology | 106 |
| Nursing, General | 106 |
| Business and Management, General | 97 |
| Accounting | 91 |
| Computer Programming | 87 |
| Executive Secretarial | 82 |

Continued from page 5

completers in all computer and information science programs in a year can be compared: when all levels of training are included, there were 855 completers in 1985 and 802 in 2004. As our society gets more and more technology driven it might seem problematic that there is a decline in information technology completers.

Liberal arts and sciences was the program with the most Associate's degree completers in 1985 with 339 graduates. This program is still a popular choice in 2004, as it ranks sixth. The degree is a frequent option for students who are planning to transfer their credits toward a Bachelor's degree program. General business and business administration degree completers combined to total 302 Associate's degrees. General nursing was another popular choice for Associate's degree students in 1985, with 106 completers. By 2004, the number of graduates in registered nursing programs had tripled, driven by the growing demand for workers in this occupation. However, graduates earning Bachelor's degrees in nursing remained about the same, with 103 degrees granted in 1985 and 95 granted in 2004. This might suggest that there is a shortage of nurses with a Bachelor's degree or that the labor market for nurses has changed with the high demand for nurses and the rising cost of health care.

Other health care related programs with many completers in 1985 included medical-related Associate's degrees and one- to two-year certificates. Practical nursing was also very popular that year, and still is in 2004 at the certificate level, although the number of completers at postsecondary institutions has declined from 109 in 1985 to 89 in 2004. Some licensed practical nurse programs are available without attendance at a postsecondary institution.

Educational institutions, like any other organization, must react to changes in the marketplace. When demand for a related occupation declines, schools will shift their resources to programs in more promising areas of study. As an example, Associate's degree programs with fewer completers in 2004 than in 1985 include executive secretarial, tourism promotion operations, electronic technology, and industrial electronics.

There were fewer programs and completers in culinary arts/chef training, criminal justice/law enforcement administration, and commercial and advertising art in 1985, but these were among the most popular programs at the Associate's degree level in 2004. Criminal justice was also a popular field for Bachelor's degree completers in 2004. In 1985, a Bachelor's degree in general communications was awarded to 106 students. By 2004, completers of this concentration more than tripled, making this one of the fastest-growing degrees and the fourth most awarded Bachelors degree in 2004 with 335 completers.

At the Master's degree level, business and management degrees were the leading source of graduates both in 1985 and 2004. Again, as with computer-related programs, changes in CIP code designations require that comparisons be made at an aggregate level. When this is done, there were 546 degrees awarded in 1985 and 912 in 2004. There were 110 degrees awarded in accounting in 1985; in 2004, there were only 33. General education is also a commonly awarded degree at the Master's level. There were 56 awards in this program in 1985 and 115 in 2004.

Michael Argiropolis

Technology changes as times go by. For example, the Internet has changed the way we obtain information. In order to keep up with technology, we changed publishing software, hence Economic Condition has gotten a minor face-lift. Changes in the small labor market areas and Metro-NECTAs restated the need for adjustments. In the process of redesigning the lay out of this monthly publication, we felt it was time to evaluate the product. Furthermore, we chose to combine this survey with an evaluation of another of our data products (County Profile of employment and wage data).

We want to thank all the readers responding (375 respondents) to the

survey sent out in spring 2005. In the following we have listed some of the major points the survey results showed:

About half of the respondents described themselves as Business, ten percent as State agency and a fifth as Other.

Seven out of ten read Economic Conditions each month.

Articles (including Hot off the press publication releases), Employment tables and Unemployment rate tables were rated as most useful to the majority of the respondents.

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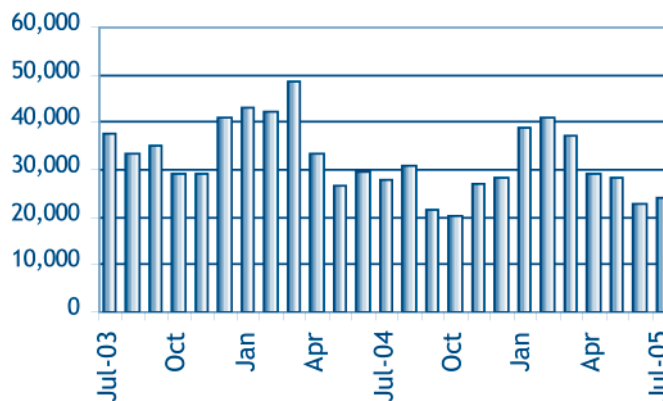
Should Economic Conditions be changed? - The readers response!

Unemployment Compensation Claims Activity

| Total Regular Unemployment Compensation Programs: | | | | Change from Previous | | | |
|---|--------|--------|--------|----------------------|---------|--------|---------|
| | | | | Month | | Year | |
| | Jul-05 | Jun-05 | Jul-04 | Net | Percent | Net | Percent |
| Initial Claims | 3,781 | 4,357 | 4,254 | -576 | -13.2% | -473 | -11.1% |
| Continued Weeks | 24,057 | 22,760 | 27,866 | 1,297 | 5.7% | -3,809 | -13.7% |

Unemployment Compensation Fund

| | |
|---|------------------|
| Unemployment compensation fund balance at the end of July | \$261,737,667.54 |
| Average payment for a week of total unemployment: | \$244.53 |
| Net benefits paid: | \$5,951,575.21 |
| Net contributions received during the month: | \$5,443,581.21 |
| Interest Received: | \$0.00 |
| Reed Act Distribution: | \$0.00 |
| Reed Act Withdrawal for Administrative Costs: | \$0.00 |



Claims Activity

Trust Fund

Continued Weeks Claimed

Jul 2003 - Jul 2005

Continued weeks claimed rose over-the-month for the first time since February.

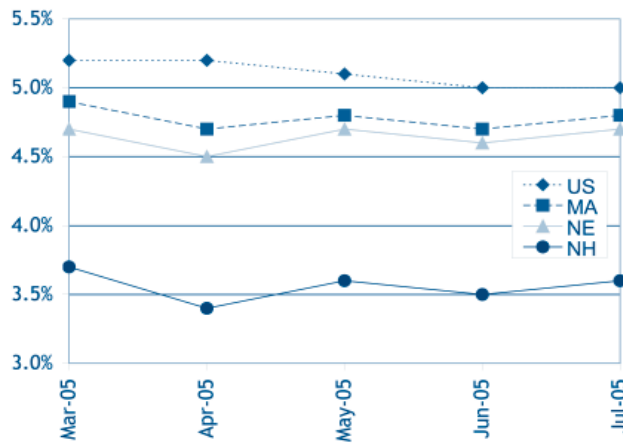
| | | | Change from Previous | |
|--------|--------|--------|----------------------|------|
| Jul-05 | Jun-05 | Jul-04 | Month | Year |
| 195.4 | 194.5 | 189.4 | 0.5% | 3.2% |

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

Consumer Price Index

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

While barely increasing over-the-month, New Hampshire's unemployment rate tied with Vermont for the lowest rate in the region.



Unemployment Rates by Region

| | preliminary Jul-05 | revised Jun-05 | preliminary Jul-04 |
|---------------|--------------------|----------------|--------------------|
| United States | 5.0% | 5.0% | 5.5% |
| Northeast | 4.8% | 4.7% | 5.3% |
| New England | 4.7% | 4.6% | 4.8% |
| Connecticut | 5.1% | 5.1% | 4.8% |
| Maine | 5.0% | 4.7% | 4.5% |
| Massachusetts | 4.7% | 4.7% | 5.1% |
| New Hampshire | 3.6% | 3.5% | 3.8% |
| Rhode Island | 5.1% | 4.8% | 5.1% |
| Vermont | 3.6% | 3.4% | 3.5% |
| Mid Atlantic | 4.9% | 4.7% | 5.5% |
| New Jersey | 4.1% | 4.0% | 4.8% |
| New York | 5.1% | 4.9% | 5.7% |
| Pennsylvania | 5.1% | 5.0% | 5.5% |

Seasonally Adjusted Labor Force Estimates

By Place of Residence

| | Mar-05 | Apr-05 | May-05 | revised Jun-05 | preliminary Jul-05 |
|--|--------|--------|--------|----------------|--------------------|
|--|--------|--------|--------|----------------|--------------------|

New Hampshire

| | | | | | |
|-------------------------------------|---------|---------|---------|---------|---------|
| Unemployment Rate | 3.7% | 3.4% | 3.6% | 3.5% | 3.6% |
| Civilian Labor Force | 729,623 | 733,778 | 734,690 | 733,710 | 734,707 |
| Number Employed | 702,516 | 708,652 | 708,316 | 707,681 | 708,288 |
| Number Unemployed | 27,107 | 25,126 | 26,374 | 26,029 | 26,419 |
| United States (in thousands) | | | | | |
| Unemployment Rate | 5.2% | 5.2% | 5.1% | 5.0% | 5.0% |
| Civilian Labor Force | 148,157 | 148,762 | 149,122 | 149,123 | 149,573 |
| Number Employed | 140,501 | 141,099 | 141,475 | 141,638 | 142,076 |
| Number Unemployed | 7,656 | 7,663 | 7,647 | 7,486 | 7,497 |

Note: Beginning in January 2005, data reflect revised population controls used in the household survey.

Seasonally Adjusted Nonfarm Employment Estimates

By Place of Establishment

| Supersector | Mar-05 | Apr-05 | May-05 | revised Jun-05 | preliminary Jul-05 |
|-------------|--------|--------|--------|----------------|--------------------|
|-------------|--------|--------|--------|----------------|--------------------|

| | | | | | |
|--------------------------------------|---------|---------|---------|---------|---------|
| Total Nonfarm | 634,500 | 636,700 | 639,800 | 637,600 | 640,100 |
| Construction | 30,400 | 31,000 | 30,800 | 30,700 | 30,400 |
| Manufacturing | 80,900 | 80,700 | 80,500 | 80,800 | 81,300 |
| Trade, Transportation, and Utilities | 141,400 | 142,500 | 143,000 | 142,900 | 144,600 |
| Financial Activities | 38,700 | 38,700 | 38,400 | 38,500 | 38,400 |
| Professional and Business Services | 55,900 | 56,400 | 56,500 | 57,000 | 56,900 |
| Leisure and Hospitality | 66,200 | 66,600 | 67,600 | 66,700 | 66,500 |
| Other Services | 20,100 | 20,000 | 20,000 | 19,800 | 20,100 |
| Government | 90,800 | 90,500 | 91,300 | 90,300 | 90,700 |

Please note that not all supersectors meet the statistical criteria for publication in this category. We seasonally adjust the total nonfarm data series and all the published supersectors independently. Therefore, the sum of the published parts will not equal the total.

Labor Force Estimates

| New Hampshire | Jul-05 | Jun-05 | Jul-04 |
|---|-------------|---------|---------|
| Number of workers | preliminary | revised | |
| Total Civilian Labor Force | 748,120 | 740,370 | 735,910 |
| Employed | 722,260 | 714,220 | 708,390 |
| Unemployed | 25,860 | 26,150 | 27,520 |
| Unemployment Rate (percent of labor force) | 3.5% | 3.5% | 3.7% |

Local Area Unemployment Statistics (LAUS)

Not Seasonally
Adjusted

By Place of Residence

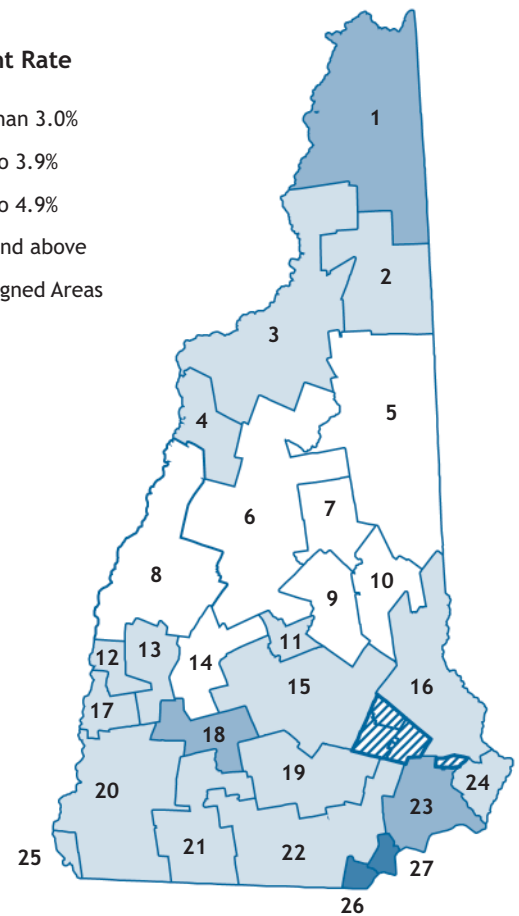
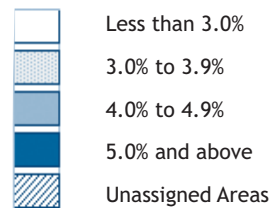
Unemployment Rates by Area

| | preliminary Jul-05 | revised Jun-05 | Jul-04 |
|--------------------------------|-----------------------|-------------------|--------|
| U.S and Regional States | | | |
| United States | 5.2% | 5.2% | 5.7% |
| Northeast | 5.0% | 4.7% | 5.5% |
| New England | 4.8% | 4.7% | 5.0% |
| Connecticut | 5.4% | 5.4% | 5.3% |
| Maine | 4.5% | 4.4% | 4.2% |
| Massachusetts | 4.9% | 4.8% | 5.3% |
| New Hampshire | 3.5% | 3.5% | 3.7% |
| Rhode Island | 5.4% | 5.0% | 5.4% |
| Vermont | 3.3% | 3.3% | 3.3% |
| Mid Atlantic | 5.0% | 4.7% | 5.7% |
| New Jersey | 4.5% | 4.1% | 5.3% |
| New York | 5.2% | 4.7% | 5.9% |
| Pennsylvania | 5.2% | 5.2% | 5.7% |

| Counties | preliminary Jul-05 | revised Jun-05 | Jul-04 |
|--------------|-----------------------|-------------------|--------|
| Belknap | 2.8% | 2.9% | 2.9% |
| Carroll | 2.8% | 3.0% | 2.8% |
| Cheshire | 3.3% | 3.1% | 3.4% |
| Coos | 3.8% | 4.8% | 4.1% |
| Grafton | 2.6% | 2.8% | 2.6% |
| Hillsborough | 3.6% | 3.7% | 4.0% |
| Merrimack | 3.1% | 3.0% | 3.0% |
| Rockingham | 4.0% | 4.1% | 4.6% |
| Strafford | 3.3% | 3.4% | 3.6% |
| Sullivan | 3.1% | 2.9% | 3.2% |

| Map | preliminary Jul-05 | revised Jun-05 | Jul-04 |
|--|-----------------------|-------------------|--------|
| Key Labor Market Areas | | | |
| 1 Colebrook NH-VT LMA, NH Portion | 4.3% | 5.8% | 4.7% |
| 2 Berlin NH MicroNECTA | 3.8% | 5.4% | 3.8% |
| 3 Littleton NH-VT LMA, NH Portion | 3.0% | 3.0% | 2.7% |
| 4 Haverhill NH LMA | 3.2% | 3.0% | 3.1% |
| 5 Conway NH-ME LMA, NH Portion | 2.8% | 3.1% | 2.9% |
| 6 Plymouth NH LMA | 2.8% | 2.9% | 2.7% |
| 7 Moultonborough NH LMA | 2.4% | 2.6% | 2.7% |
| 8 Lebanon NH-VT MicroNECTA, NH Portion | 2.4% | 2.7% | 2.4% |
| 9 Laconia NH MicroNECTA | 2.9% | 2.9% | 2.9% |
| 10 Wolfeboro NH LMA | 2.6% | 2.7% | 2.7% |
| 11 Franklin NH MicroNECTA | 3.3% | 3.3% | 3.2% |
| 12 Claremont NH MicroNECTA | 3.3% | 3.1% | 3.5% |
| 13 Newport NH LMA | 3.1% | 2.9% | 3.1% |
| 14 New London NH LMA | 2.7% | 2.8% | 2.6% |
| 15 Concord NH MicroNECTA | 3.0% | 3.1% | 3.0% |
| 16 Rochester-Dover NH-ME MetroNECTA, NH Portion | 3.4% | 3.4% | 3.6% |
| 17 Charlestown NH LMA | 3.5% | 3.3% | 4.1% |
| 18 Hillsborough NH LMA | 4.5% | 3.4% | 3.7% |
| 19 Manchester NH MetroNECTA | 3.4% | 3.5% | 3.7% |
| 20 Keene NH MicroNECTA | 3.1% | 3.0% | 3.1% |
| 21 Peterborough NH LMA | 3.8% | 3.5% | 4.0% |
| 22 Nashua NH-MA NECTA Division, NH Portion | 3.9% | 3.8% | 4.4% |
| 23 Exeter Area, NH Portion, Haverhill-N. Andover-Amesbury MA-NH NECTA Division | 4.1% | 4.4% | 5.0% |
| 24 Portsmouth NH-ME MetroNECTA, NH Portion | 3.2% | 3.4% | 3.6% |
| 25 Hinsdale Town, NH Portion, Brattleboro VT-NH LMA | 3.4% | 3.5% | 4.1% |
| 26 Pelham Town, NH Portion, Lowell-Billerica-Chelmsford MA-NH NECTA Division | 5.0% | 5.4% | 5.8% |
| 27 Salem Town, NH Portion, Lawrence-Methuen-Salem MA-NH NECTA Division | 5.2% | 5.4% | 6.2% |

July Unemployment Rate



New Hampshire unemployment and labor force estimates are calculated using a regression model which depends on Current Population Survey (CPS) Estimates. Labor Market Area estimates are calculated using the Bureau of Labor Statistics "Handbook Method" and then adjusted to the State levels.

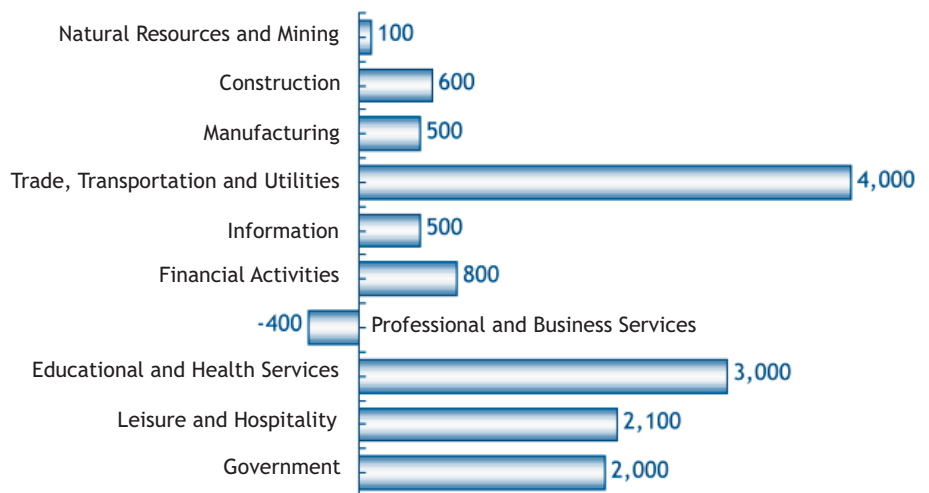
Monthly Not Seasonally Adjusted New Hampshire Nonfarm Wage and Salary Employment

Leisure and hospitality gave the seasonal boost to private employment over-the-month, providing 3,900 of the 4,000 additional jobs.

| Current Employment Statistics Employment by Super Sector by place of establishment | Number of Jobs | | | Change from previous: | |
|--|-------------------------|-------------------|---------|-----------------------|--------|
| | Jul-05 preliminary | Jun-05 revised | Jul-04 | Month | Year |
| | Total All Super Sectors | 643,200 | 647,500 | 630,800 | -4,300 |
| Private Employment Total | 561,700 | 557,700 | 551,300 | 4,000 | 10,400 |
| Natural Resources and Mining | 1,100 | 1,000 | 1,000 | 100 | 100 |
| Construction | 32,500 | 32,000 | 31,900 | 500 | 600 |
| Manufacturing | 80,600 | 81,400 | 80,100 | -800 | 500 |
| Durable Goods | 61,600 | 62,100 | 60,400 | -500 | 1,200 |
| Non-Durable Goods | 19,000 | 19,300 | 19,700 | -300 | -700 |
| Trade, Transportation and Utilities | 144,300 | 143,900 | 140,300 | 400 | 4,000 |
| Wholesale Trade | 28,200 | 28,200 | 27,500 | 0 | 700 |
| Retail Trade | 100,200 | 99,700 | 97,700 | 500 | 2,500 |
| Transportation and Utilities | 15,900 | 16,000 | 15,100 | -100 | 800 |
| Information | 12,900 | 12,900 | 12,400 | 0 | 500 |
| Financial Activities | 38,800 | 38,900 | 38,000 | -100 | 800 |
| Professional and Business | 57,400 | 57,400 | 57,800 | 0 | -400 |
| Educational and Health | 97,000 | 97,300 | 94,000 | -300 | 3,000 |
| Leisure and Hospitality | 76,500 | 72,600 | 74,400 | 3,900 | 2,100 |
| Other Services | 20,600 | 20,300 | 21,400 | 300 | -800 |
| Government Total | 81,500 | 89,800 | 79,500 | -8,300 | 2,000 |

Change in Nonfarm Employment

Jul 2004 to Jul 2005



Monthly Analysis of Current Employment Statistics (CES) Data

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

Seasonally Adjusted:

Preliminary seasonally adjusted estimates of employment showed that New Hampshire employers added 2,500 jobs to the economy in July. Trade, transportation, and utilities (supersector 40) covered 1,700 of those added jobs, while manufacturing (supersector 30) employment perked up by 500. The number of persons employed by government (supersector 90) increased by 400, and other services (supersector 80) added 300 jobs to the mix.

On the other side of the ledger, the state saw construction (supersector 20) drop

300 jobs from its force, as employment in leisure and hospitality (supersector 70) slipped by 200 jobs. Both financial activities (supersector 55) and professional and business services (supersector 60) trimmed 100 jobs from their respective payrolls.

Unadjusted:

Seasonal influences played a major role in the 4,300-job downturn in the unadjusted employment trend line for July. As education services in the public sector wrapped up its operation for another school term, 8,300 workers took a hiatus from government (supersector 90). Many manufacturing (supersector

Monthly Unadjusted Nonfarm Wage and Salary Employment by Metropolitan Statistical Areas

| Employment by Sector number of jobs by place of establishment | Manchester NH MetroNECTA | | | Nashua NH-MA NECTA Division, NH Portion | | | Portsmouth NH-ME MetroNECTA, NH Portion | | | Rochester-Dover NH-ME MetroNECTA, NH Portion | | |
|---|---|--------------------------|-------|--|--------------------------|-------|---|--------------------------|-------|--|--------------------------|-------|
| | preliminary Jul-05 | Change from previous: | | preliminary Jul-05 | Change from previous: | | preliminary Jul-05 | Change from previous: | | preliminary Jul-05 | Change from previous: | |
| | | Month | Year | | Month | Year | | Month | Year | | Month | Year |
| Total All Sectors | 99,800 | -1,100 | 1,900 | 127,900 | -4,500 | 1,300 | 57,700 | 400 | 2,100 | 53,400 | -900 | 1,200 |
| Private Employment Total | 89,600 | -200 | 1,300 | 117,600 | -400 | 1,200 | 48,800 | 1,200 | 1,600 | 42,600 | 200 | 400 |
| Natural Resources and Construction | 5,700 | 100 | 200 | 6,300 | 0 | 0 | 2,000 | 100 | 100 | 2,300 | 0 | 100 |
| Manufacturing | 9,500 | -300 | -100 | 26,100 | -200 | -200 | 4,000 | 0 | 100 | 6,300 | -100 | 300 |
| Trade, Transportation and Utilities | 21,200 | 0 | 700 | 31,300 | -100 | 1,000 | 11,900 | 100 | 100 | 11,200 | 100 | -200 |
| Wholesale Trade | 5,200 | 0 | 0 | 5,600 | -100 | 0 | 2,000 | 100 | 0 | 1,400 | 0 | -100 |
| Retail Trade | 12,900 | 0 | 400 | 21,200 | 0 | 600 | 8,400 | 0 | 0 | 8,800 | 100 | -100 |
| Transportation, Warehousing and Utilities | Information will be made available in January 2006 | | | 4,500 | 0 | 400 | 1,500 | 0 | 100 | 1,000 | 0 | 0 |
| Information | 3,300 | 0 | 0 | 2,000 | 0 | 0 | 1,900 | 0 | 300 | 1,400 | 0 | 100 |
| Financial Activities | 8,900 | 0 | 100 | 8,300 | 0 | 200 | 4,900 | 100 | 100 | 2,800 | 100 | 100 |
| Professional and Business | 11,500 | 0 | -700 | 13,200 | -100 | 300 | 8,100 | 0 | 0 | 3,800 | 0 | 0 |
| Educational and Health | 16,400 | 0 | 600 | 15,000 | -300 | 0 | 5,500 | 0 | 100 | 7,500 | 0 | 300 |
| Leisure and Hospitality | 8,900 | 0 | 400 | 10,900 | 200 | -100 | 8,800 | 800 | 700 | 5,400 | 100 | -300 |
| Services | 4,200 | 0 | 100 | 4,500 | 100 | 0 | 1,700 | 100 | 100 | 1,900 | 0 | 0 |
| Government Total | 10,200 | -900 | 600 | 10,300 | -4,100 | 100 | 8,900 | -800 | 500 | 10,800 | -1,100 | 800 |

Note: Employment estimates for the Lawrence-Methuen-Salem MA-NH NECTA Division, NH Portion, will be available with January 2006 data.

Average Earnings and Hours of Production Workers in Manufacturing

| Sector | Average Weekly Earnings | | | Average Weekly Hours | | | Average Hourly Earnings | | |
|--|-------------------------|-------------------|----------|-----------------------|-------------------|--------|-------------------------|-------------------|---------|
| | Jul-05 preliminary | Jun-05 revised | Jul-04 | Jul-05 preliminary | Jun-05 revised | Jul-04 | Jul-05 preliminary | Jun-05 revised | Jul-04 |
| New Hampshire | | | | | | | | | |
| All Manufacturing | \$651.65 | \$643.01 | \$618.19 | 40.4 | 40.8 | 39.3 | \$16.13 | \$15.76 | \$15.73 |
| Durable Goods | \$675.58 | \$655.52 | \$625.96 | 41.6 | 41.7 | 40.1 | \$16.24 | \$15.72 | \$15.61 |
| Nondurable Goods | \$587.02 | \$609.79 | \$593.72 | 37.2 | 37.2 | 36.9 | \$15.78 | \$15.88 | \$16.09 |
| Manchester NH MetroNECTA | | | | | | | | | |
| All Manufacturing | \$708.07 | \$667.78 | \$672.80 | 41.0 | 41.4 | 38.6 | \$17.27 | \$16.13 | \$17.43 |
| Nashua NH-MA NECTA Division, NH Portion | | | | | | | | | |
| All Manufacturing | \$718.68 | \$720.25 | \$646.00 | 42.5 | 43.0 | 40.4 | \$16.91 | \$16.75 | \$15.99 |

Note: Production workers and information for Portsmouth and Rochester will be available with January 2006 data.

30) firms observed their annual shut down and reduced their ranks by a cumulative 800 jobs.

Also in July, seasonal factors played a lesser role in the 300-job drop in educational and health services (supersector 65). Financial activities (supersector 55) completed the list of those incurring job reductions, as it pared 100 position from the register.

Total employment in information (supersector 50) and professional and business services (supersector 60) remained unchanged between the June and July estimates.

To stem the tide of job loss, leisure and hospitality (supersector 70) expanded its force by 3,900 jobs, and construction (supersector 20) increased its cadre by 500. Trade, transportation, and utilities (supersector 40) contributed 400 jobs to the mitigation effort, as other services (supersector 80) chipped in 300 jobs. Natural resources and mining (supersector 10) rounded out employment activity for July by adding 100 jobs.

B. G. McKay

Continued from page 7

Close to three quarters of the respondents did not prefer on-line access only.

Some suggestions requested information about housing permits, population, and poverty data. The Economic and Labor Market Information Bureau is not the primary source for these types of data and most of these data sets do not get released on a monthly basis. However, we will accommodate many of these suggestions and requests as we write articles about different social and economic topics of interest to businesses, economic developers and citizens of New Hampshire.

The general conclusion is that readers are satisfied with the publication - the reason why we feel no urgent need at this time to change the structure, content or frequency (monthly versus quarterly) of Economic Conditions. Based on reader feedback, we will also continue to distribute Economic Conditions in hard copy format as well as publishing it on-line.

If you feel strongly about an issue or have ideas about what we should change, you are always welcome to contact us.

Annette Nielsen

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