



New Hampshire's Demographics, Economy, and Access to Opportunity

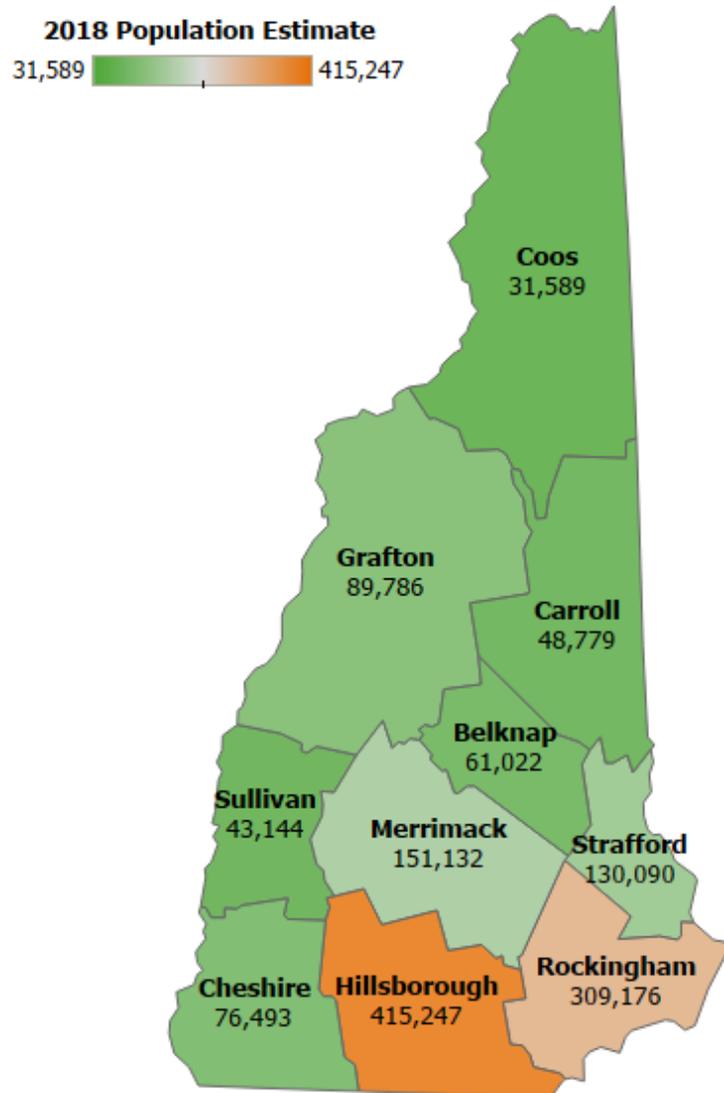
New Hampshire Fiscal Policy Institute
Seventh Annual Conference
*Strengthening New Hampshire:
Creating Equitable Opportunities for All Granite Staters*
February 21, 2020

New Hampshire's Population

Estimated 2018 Population by County

New Hampshire

Source: U.S. Census Bureau, Population Estimates Program



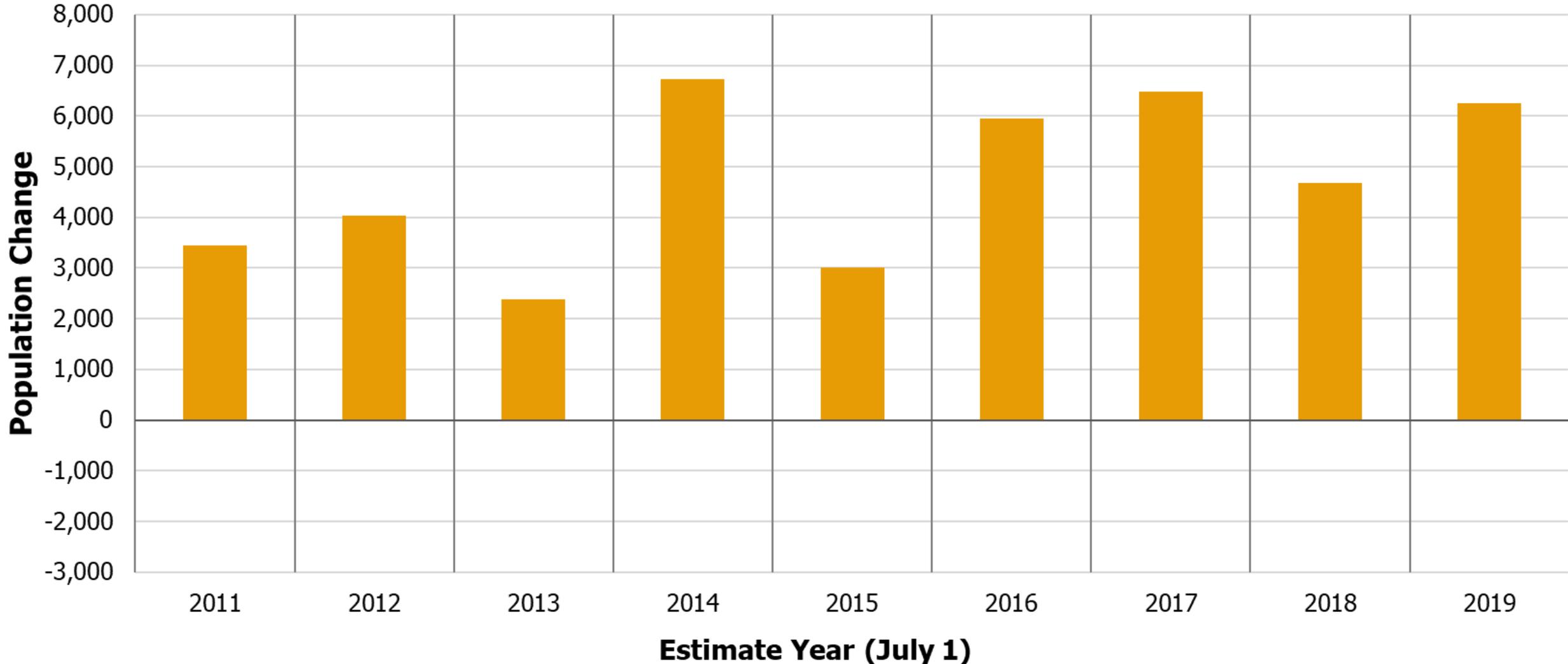
- 2010 Census: **1,316,470**
- 2019 Estimate: **1,359,711**
- Approximately **three quarters of the state population** live in **Hillsborough, Rockingham, Merrimack, and Strafford counties**

Sources: U.S. Census Bureau, Population Estimates Program, 2010, 2018, and 2019 estimates

New Hampshire Population Change by Component

Estimates of Total Change

■ Net Total Population Change

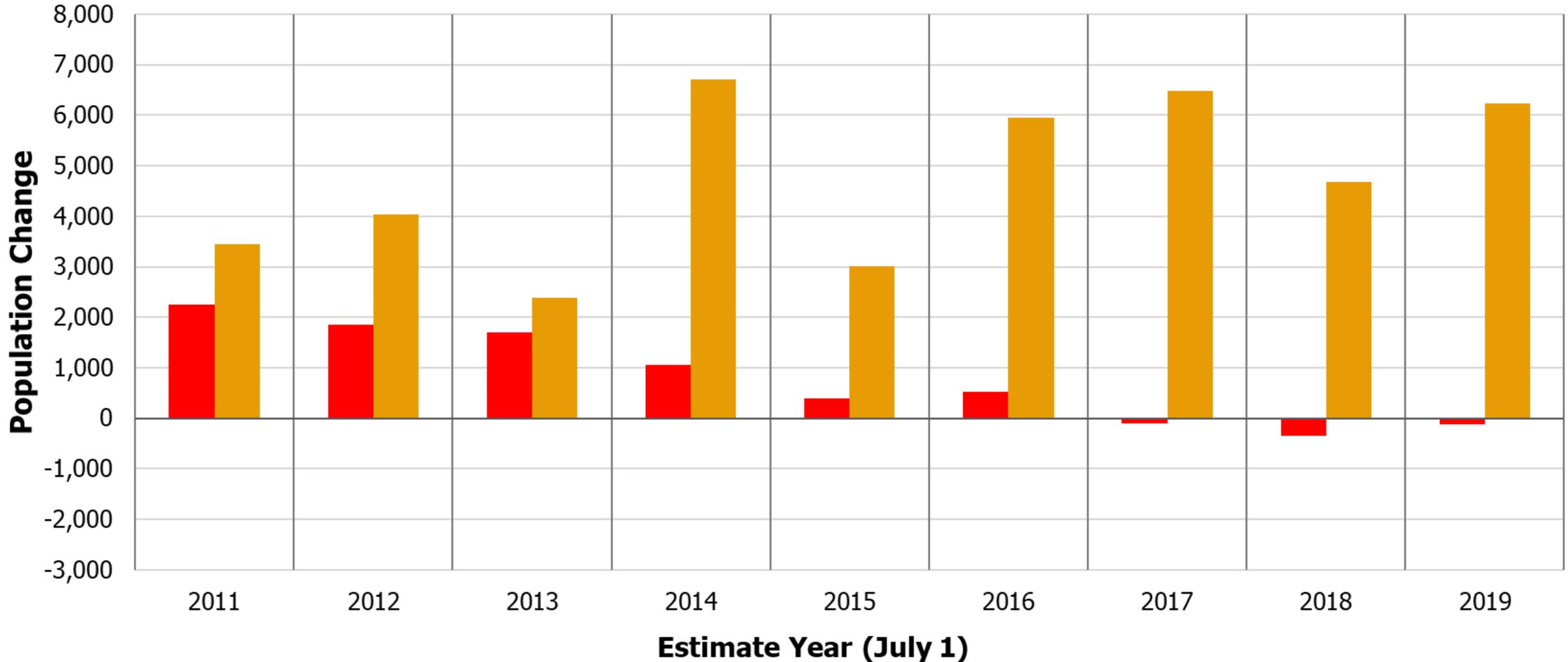


New Hampshire Population Change by Component

Estimates of Total and Natural Change

■ Natural Increase (Births Minus Deaths)

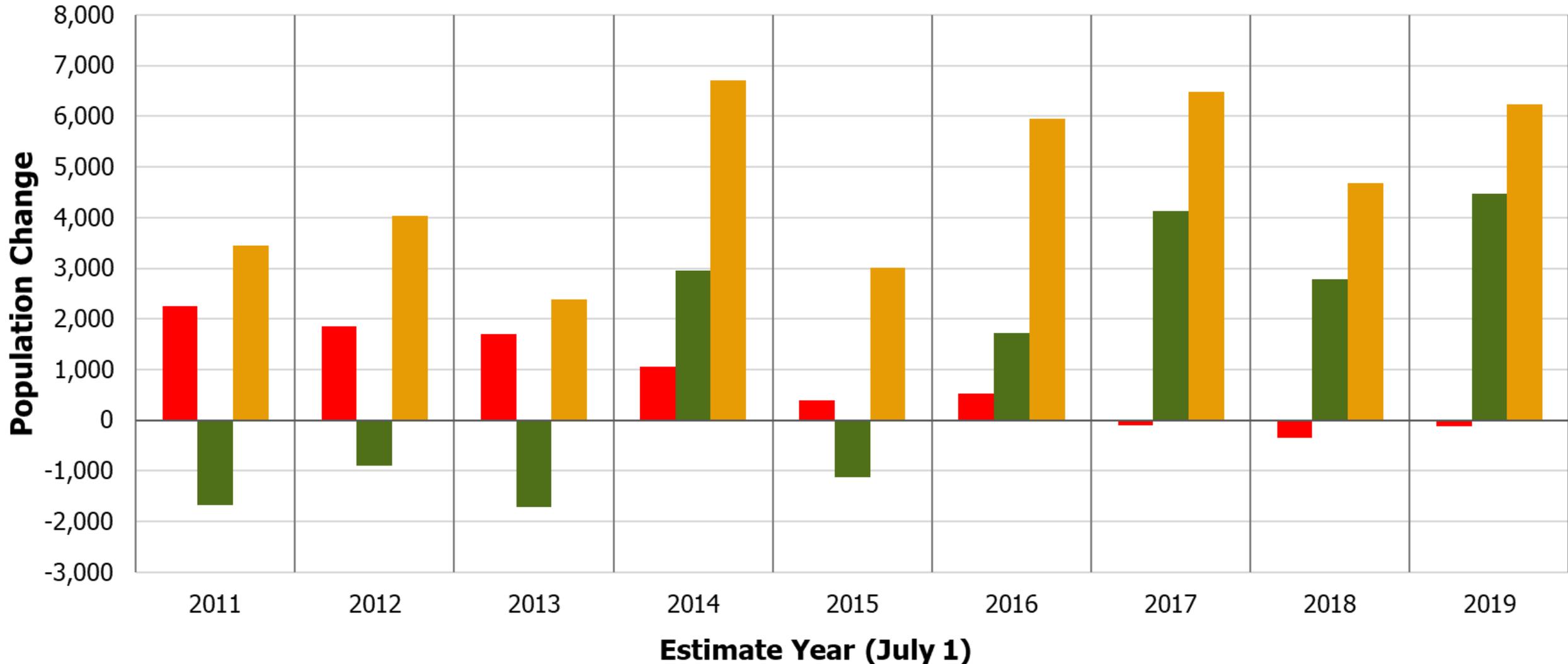
■ Net Total Population Change



New Hampshire Population Change by Component

Estimates of Total and Natural Change, Net Domestic Migration

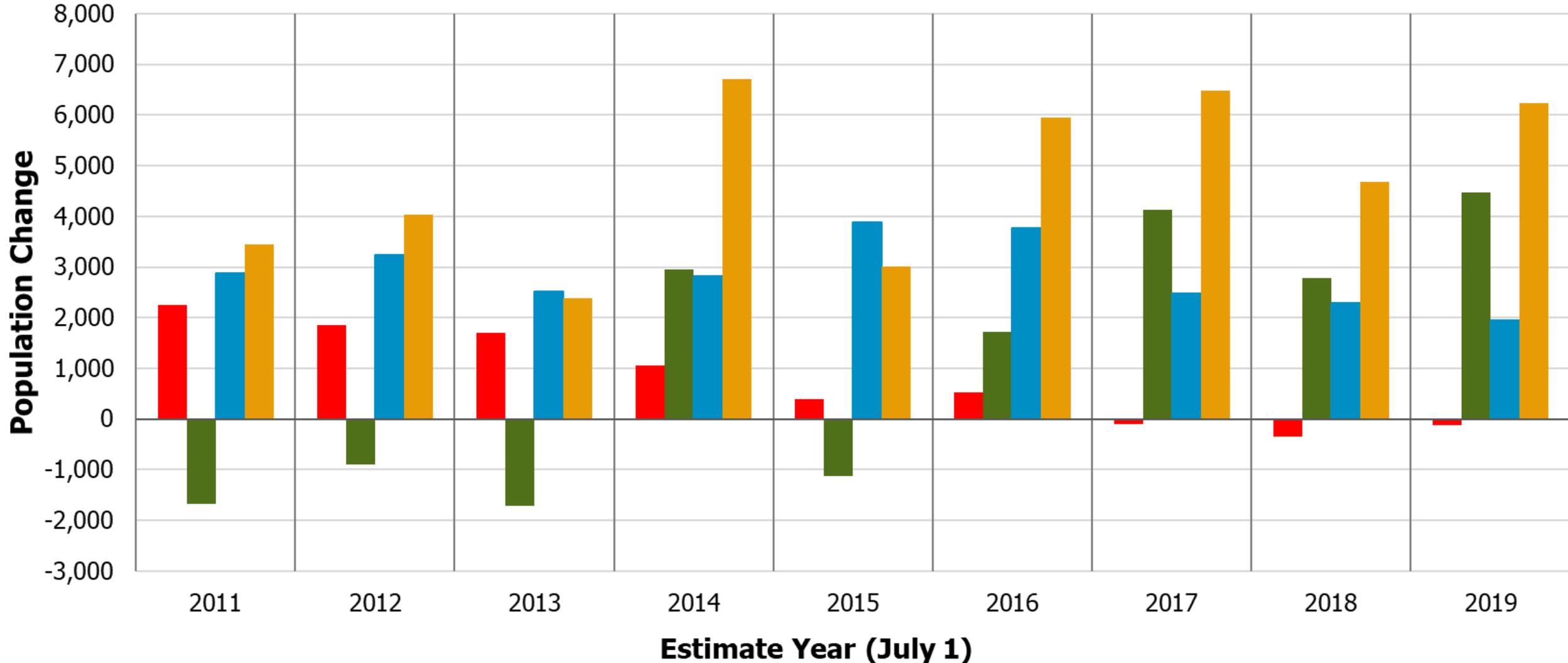
■ Natural Increase (Births Minus Deaths) ■ Net Domestic Migration ■ Net Total Population Change



New Hampshire Population Change by Component

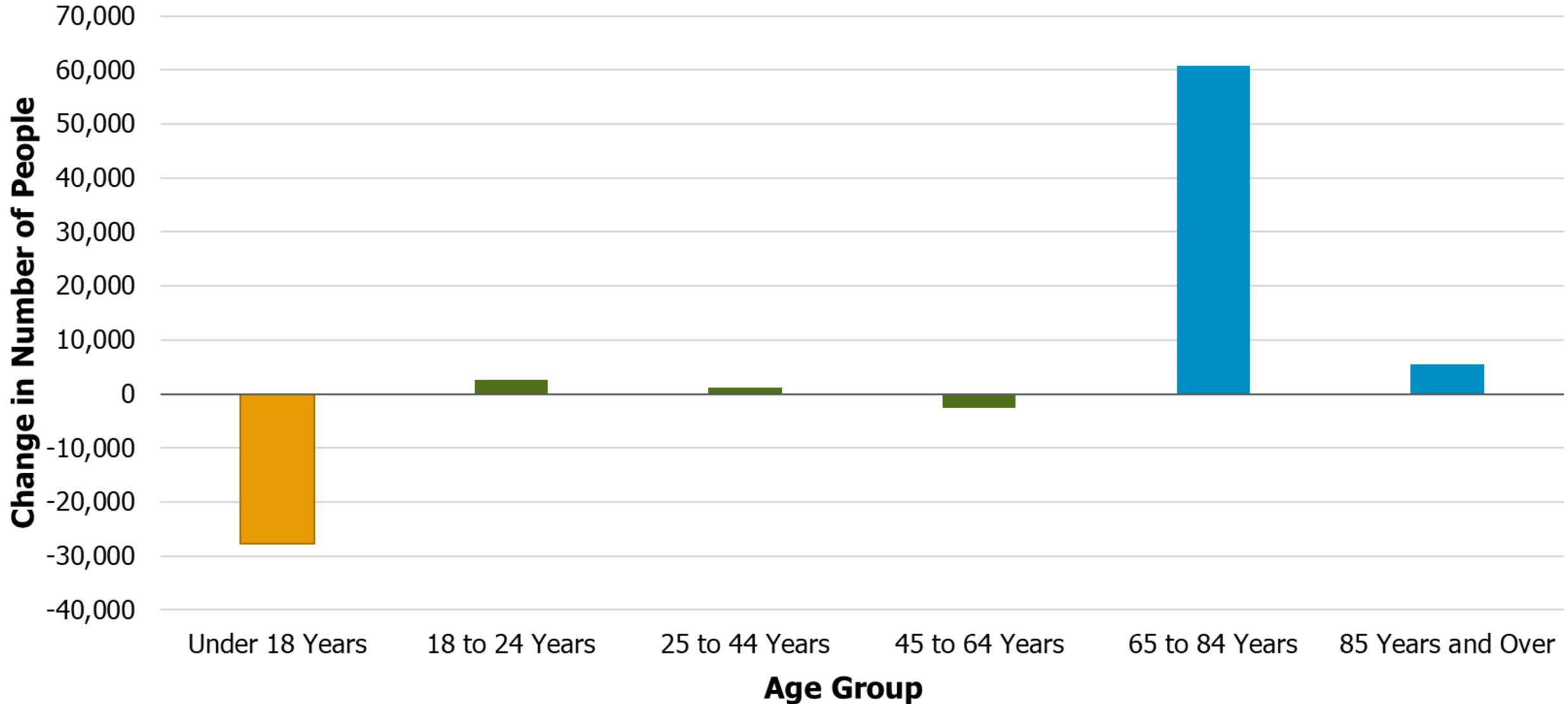
Estimates of Total and Natural Change, Net Domestic and International Migration

■ Natural Increase (Births Minus Deaths) ■ Net Domestic Migration ■ Net International Migration ■ Net Total Population Change



Estimated Population Change by Age Group

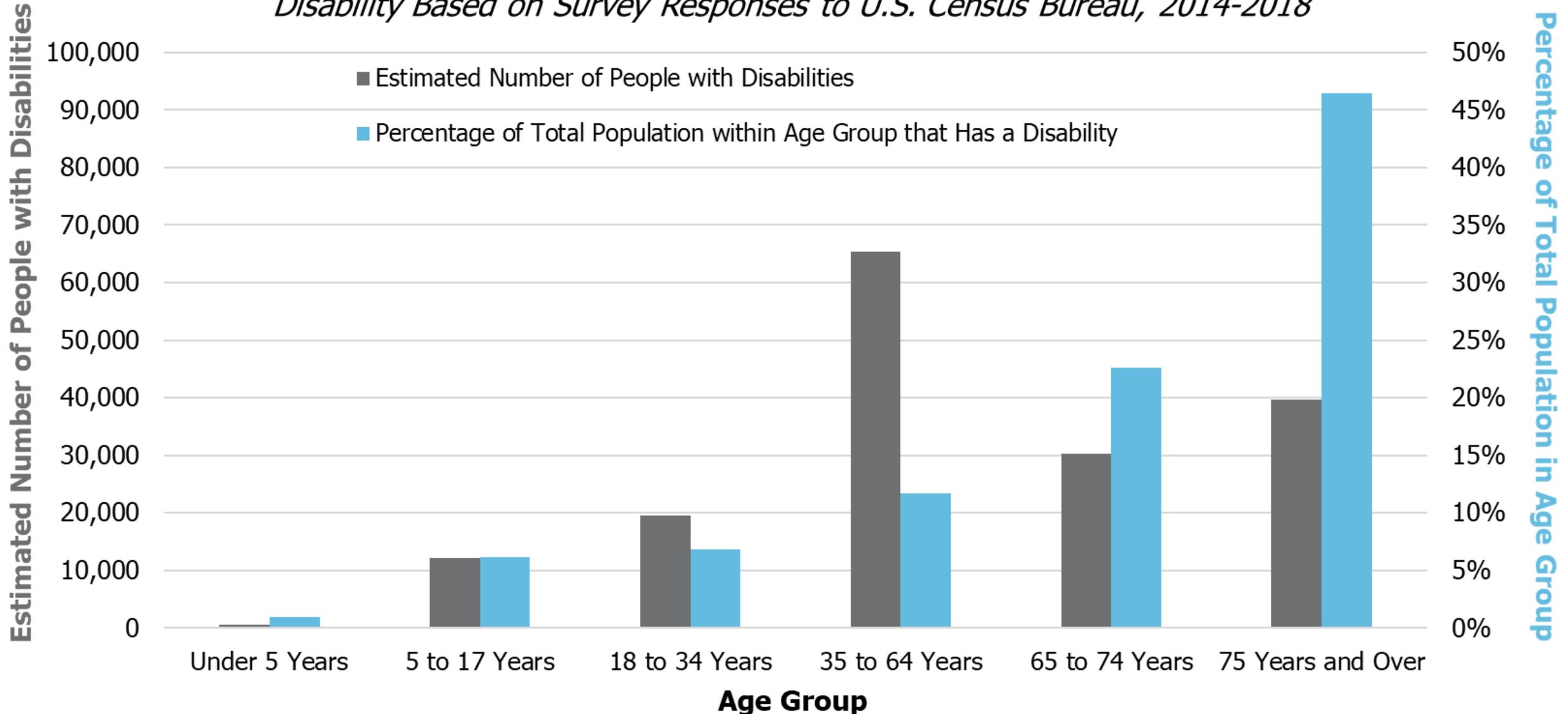
New Hampshire, 2010 to 2018



Source: U.S. Census Bureau, Population Estimates Program, July 1 of 2010 and 2018

New Hampshire Individuals with Disabilities by Age Group

Disability Based on Survey Responses to U.S. Census Bureau, 2014-2018



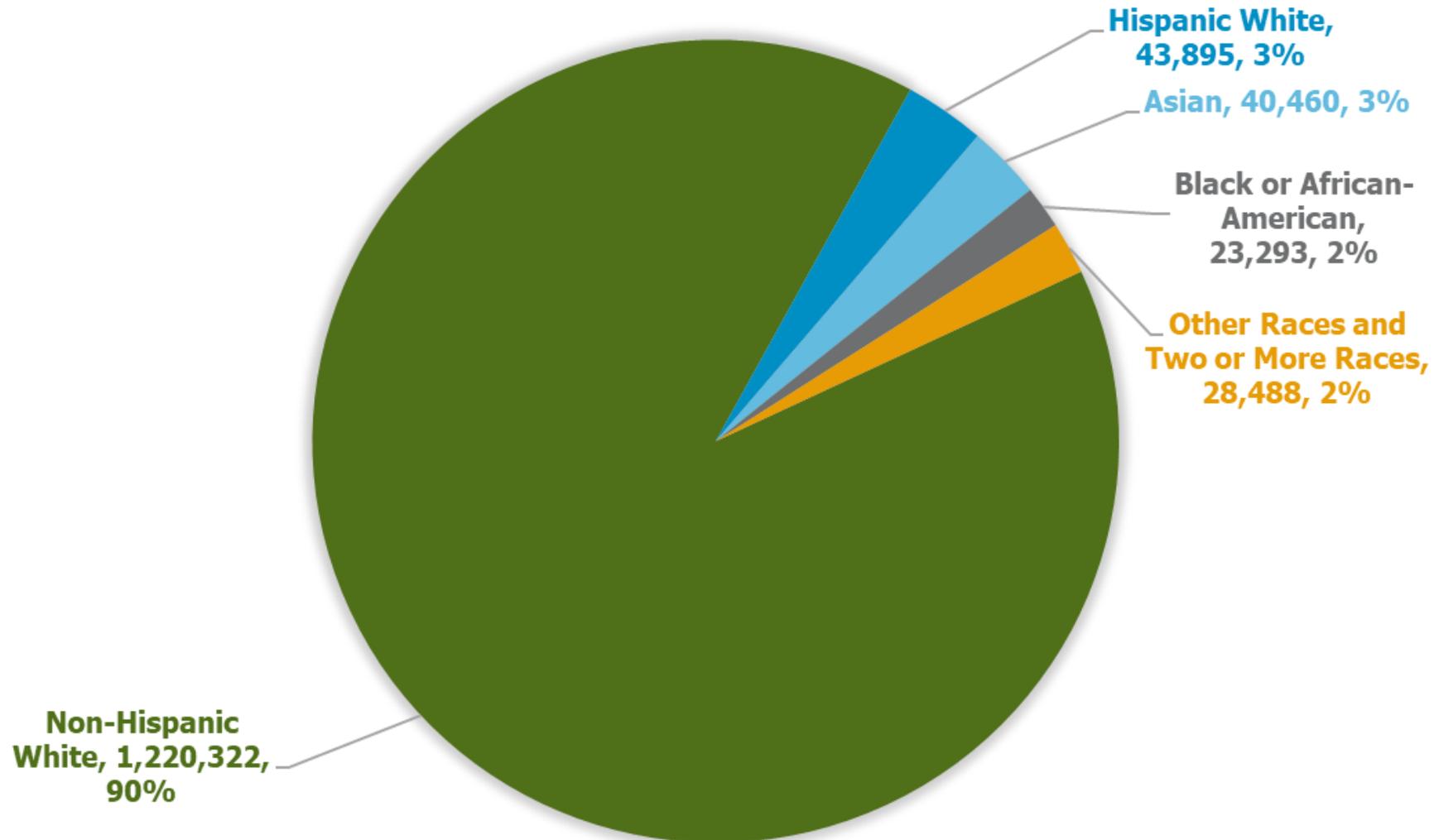
Source: U.S. Census Bureau, American Community Survey Five-Year Estimates, 2014-2018

Population by Race and Ethnicity

New Hampshire, Estimates for July 2018

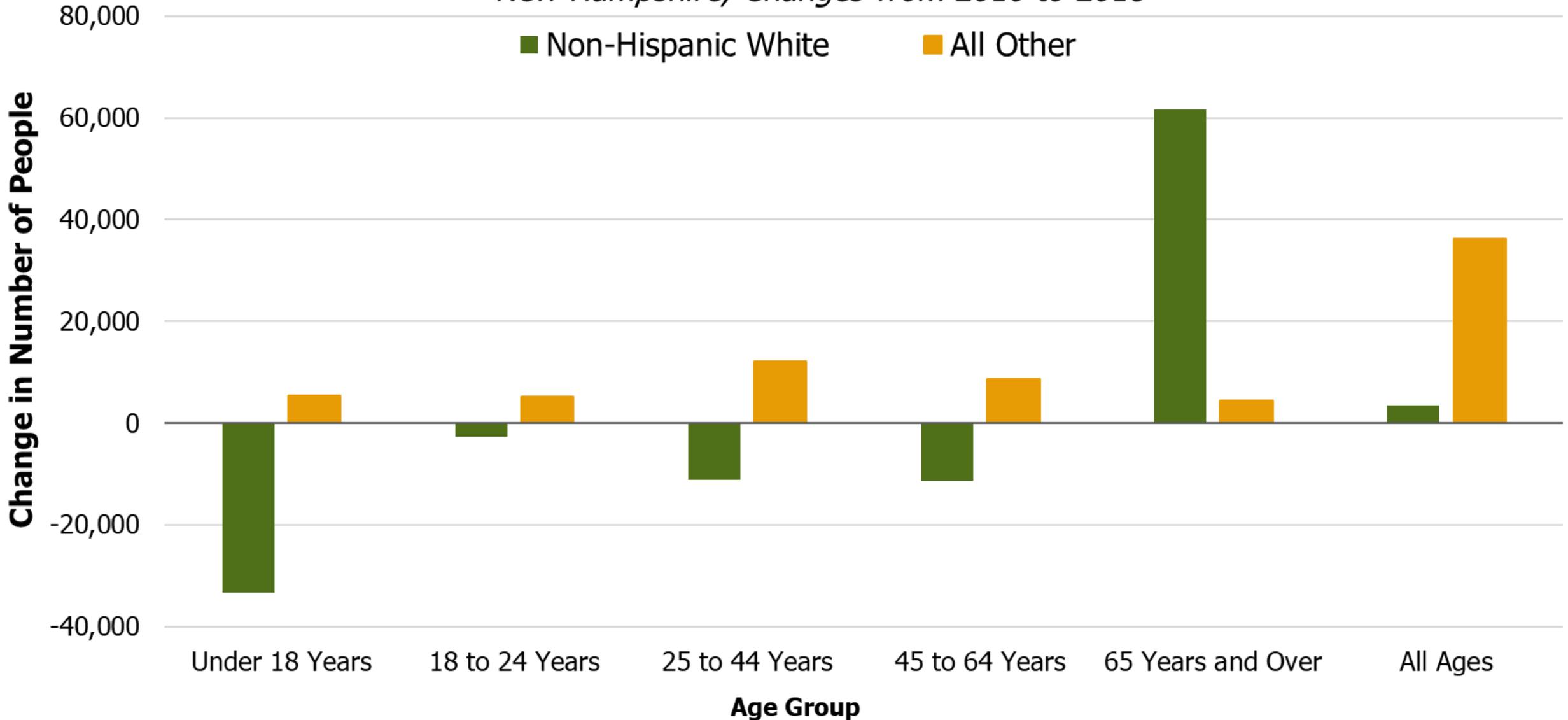
Hispanic Included Unless Specified

Source: U.S. Census Bureau



Population Changes by Age and Race or Ethnicity

New Hampshire, Changes from 2010 to 2018



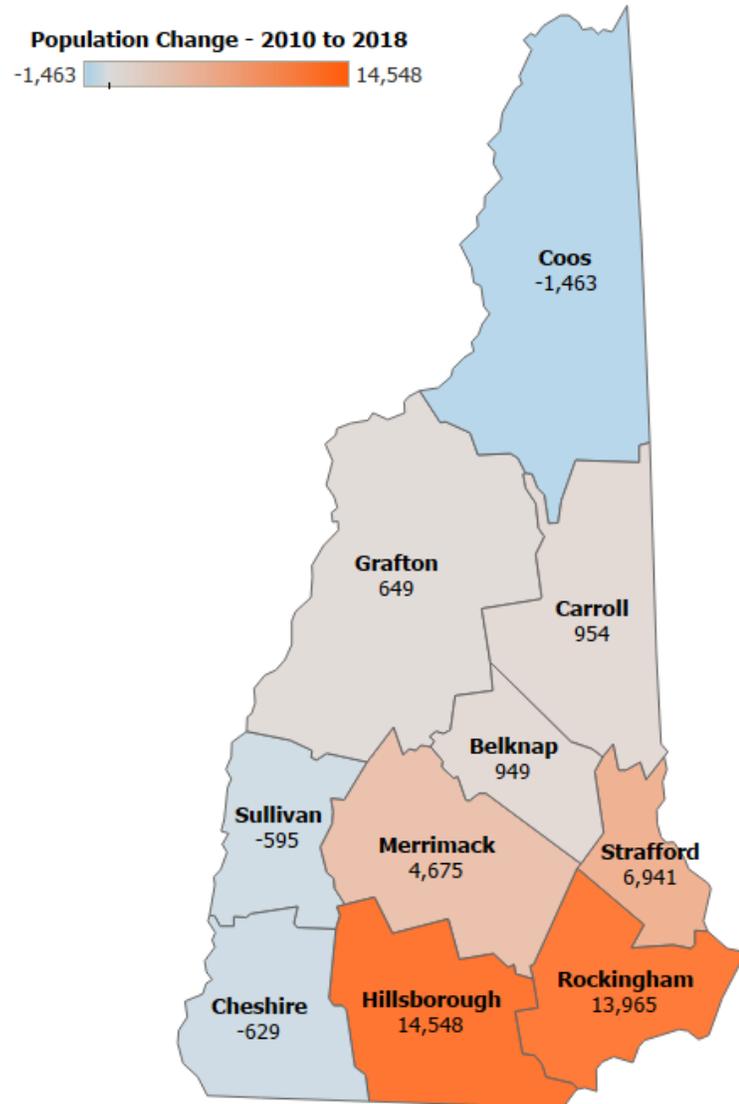
Source: U.S. Census Bureau, Population Estimates Program; Estimates for July 1 of 2010 and 2018

Population Change Varies by Geography

Estimated Population Change by County

New Hampshire, April 1, 2010 to July 1, 2018

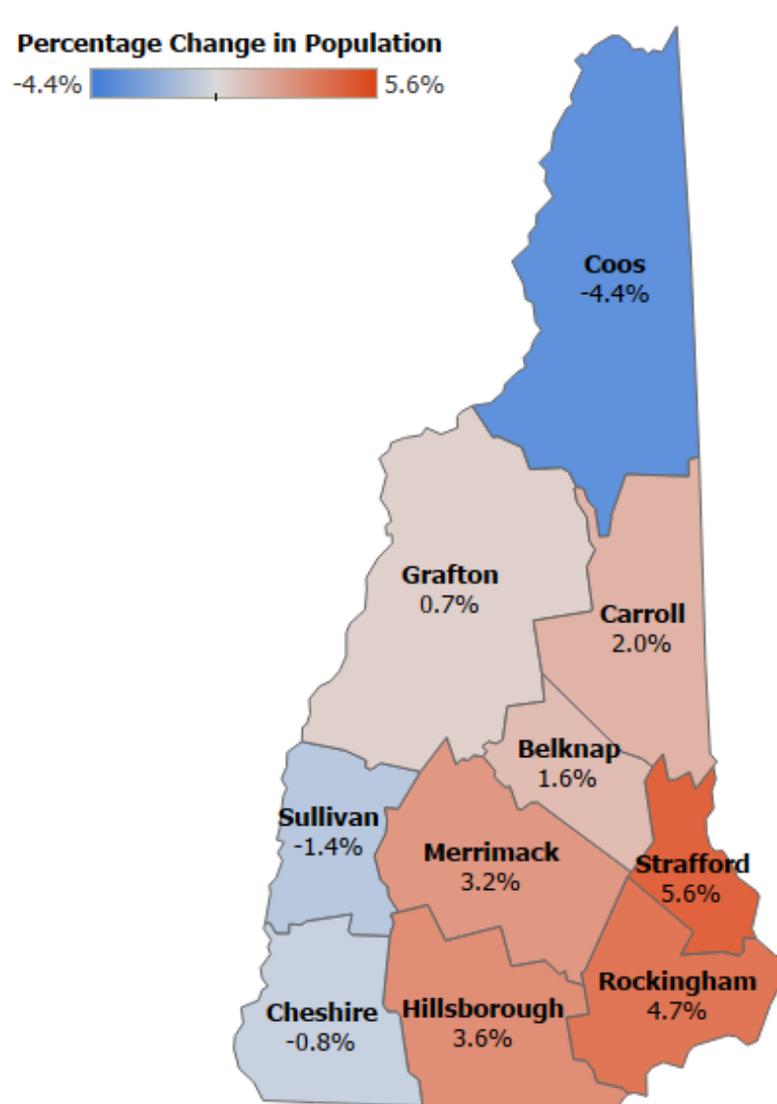
Source: U.S. Census Bureau, Population Estimates Program



Percentage Population Change by County

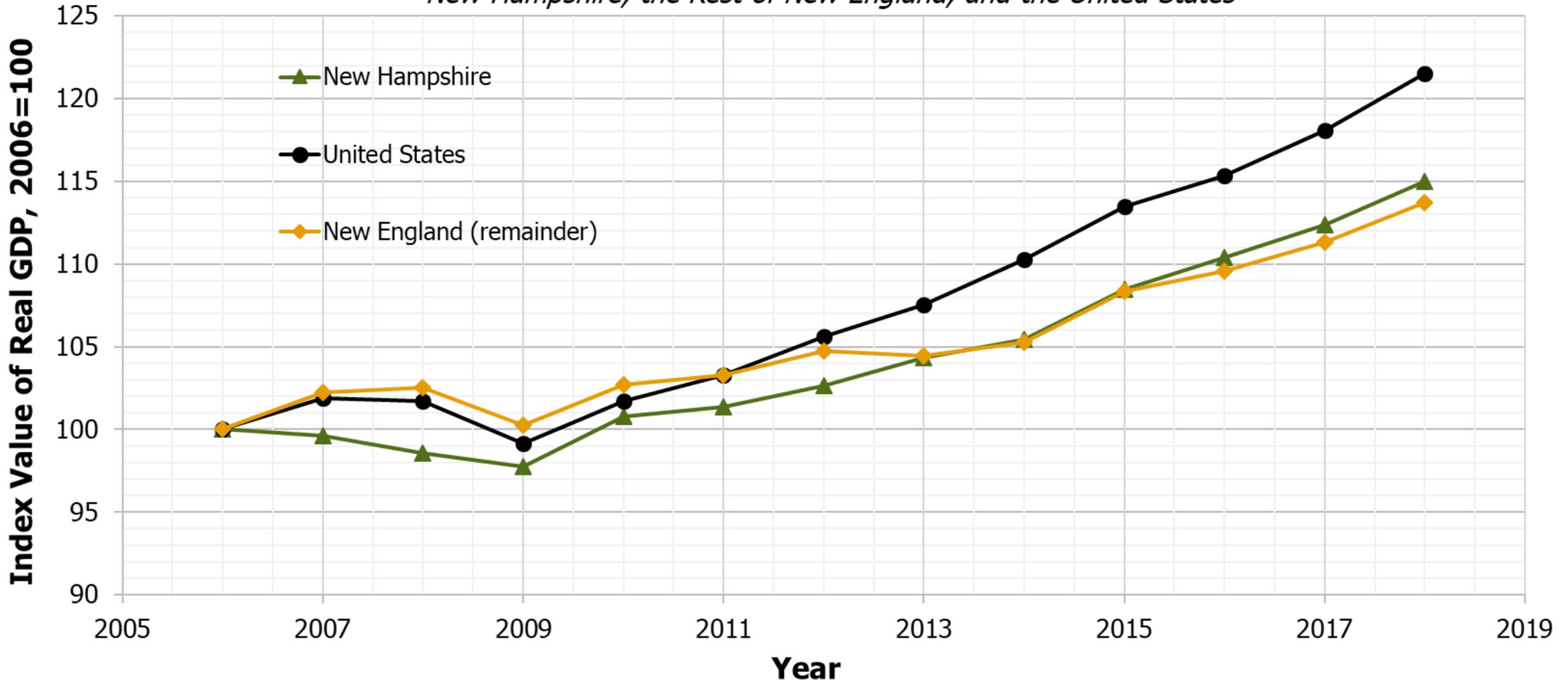
Estimates, New Hampshire, April 1, 2010 to July 1, 2018

Source: U.S. Census Bureau, Population Estimates Program



New Hampshire's Relative Economic Growth Since Recession

*Changes in Inflation-Adjusted Gross Domestic Product
New Hampshire, the Rest of New England, and the United States*



Note: Certain detailed 2018 data pending. Inflation adjustment is 2012 chained dollars.

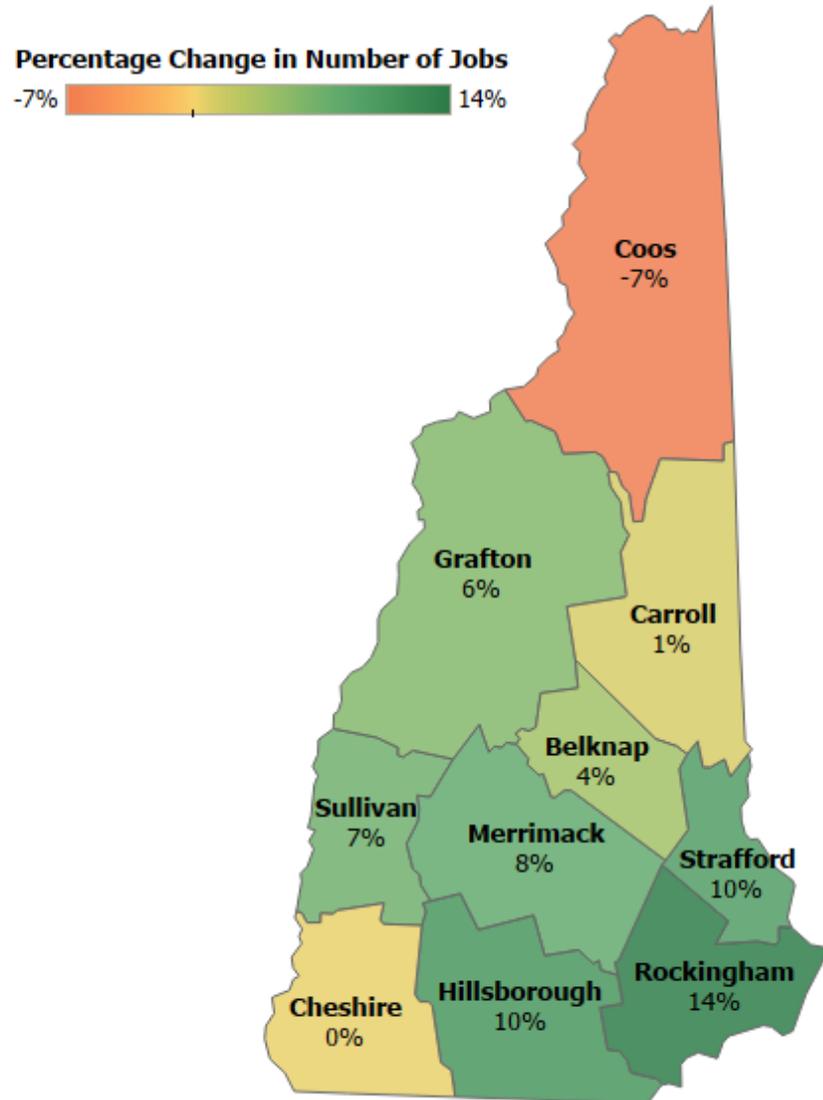
Source: U.S. Bureau of Economic Analysis

Job and Wage Growth Varies by Region

Percentage Change in Jobs by County

Based on Number of Jobs Per New Hampshire County, 2010-2018

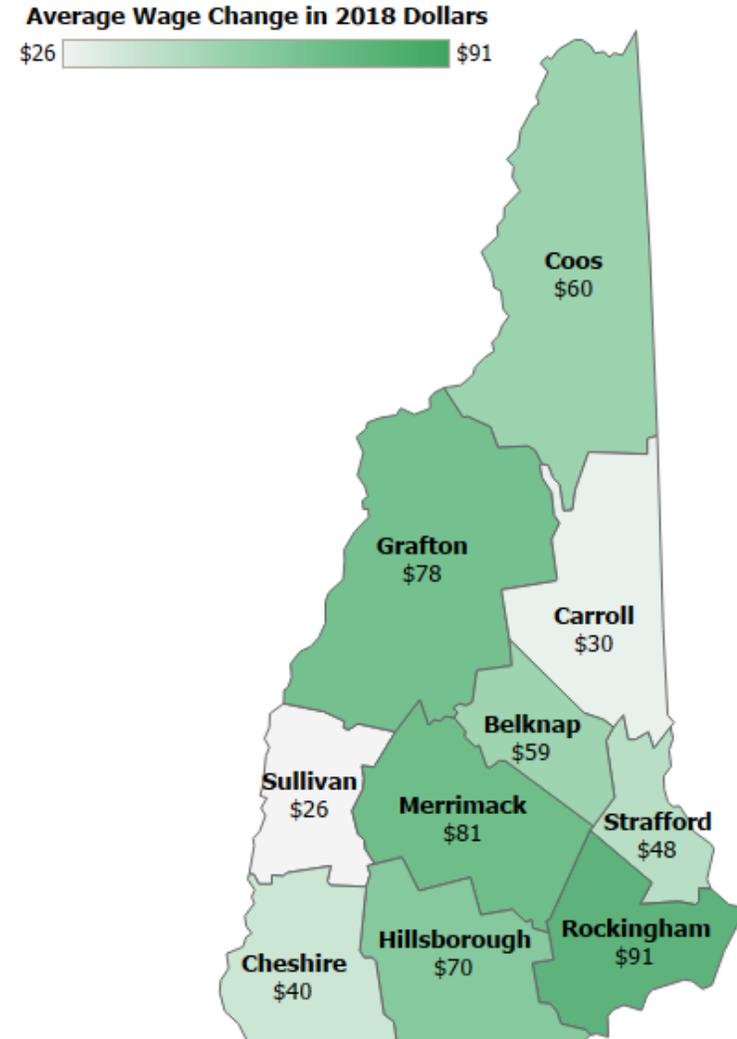
Source: New Hampshire Employment Security, Covered Employment and Wages



Change in Inflation-Adjusted Weekly Wages

Average Increase in Weekly Wages for Jobs in Each County, 2010 to 2018, in 2018 Dollars

Source: New Hampshire Employment Security, Covered Employment and Wages

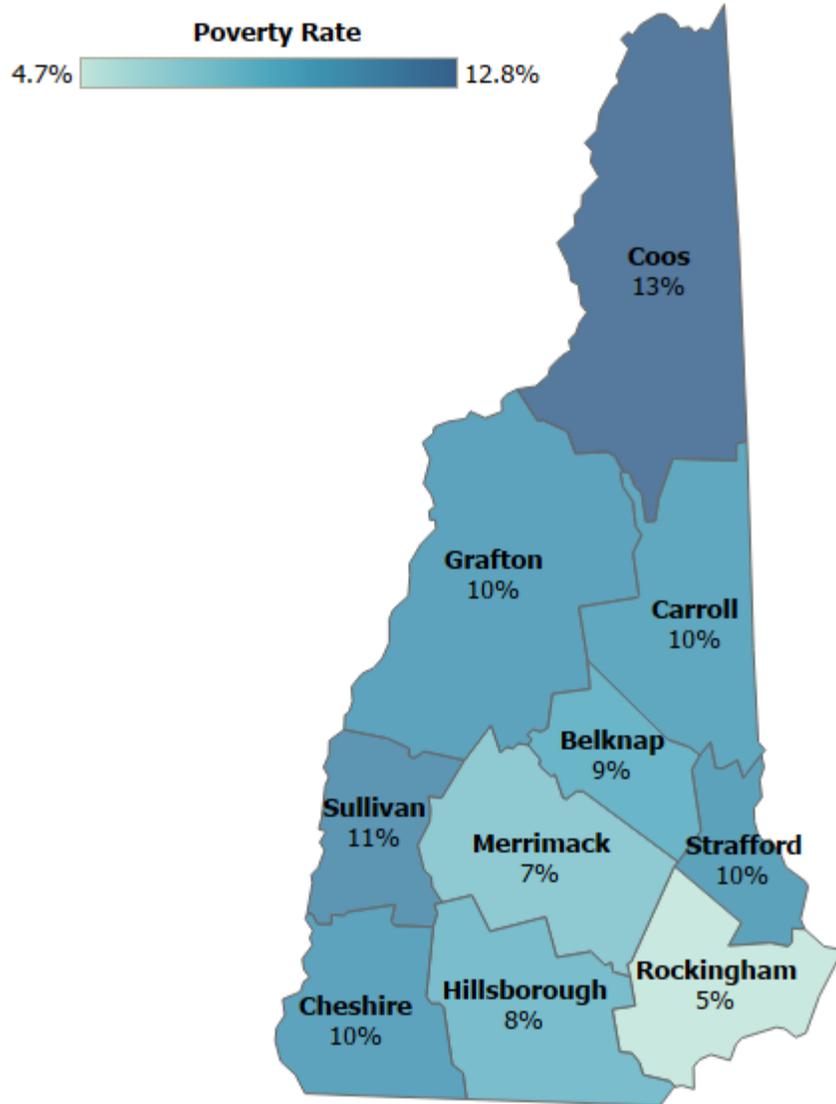


Income and Poverty Varies Across State's Regions

Poverty Rate Estimates by County

New Hampshire, 2014-2018

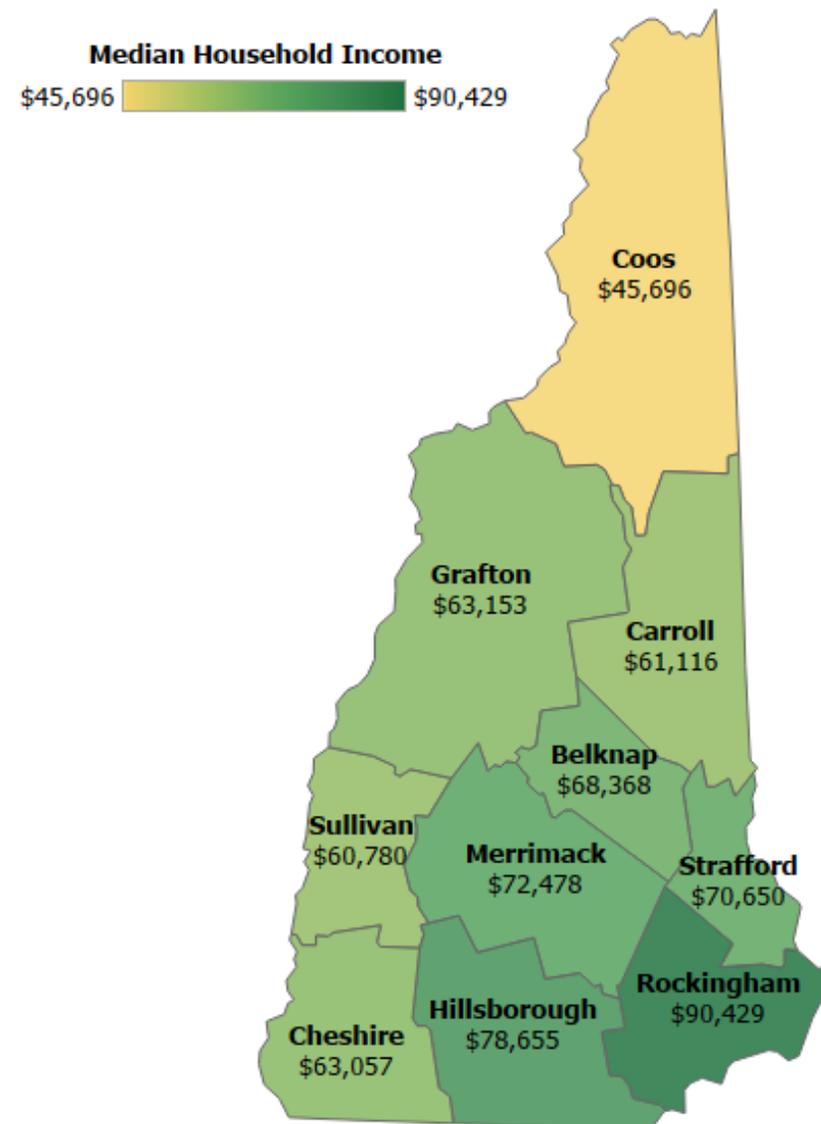
Source: U.S. Census Bureau, American Community Survey Five-Year Data



Median Household Income Estimates by County

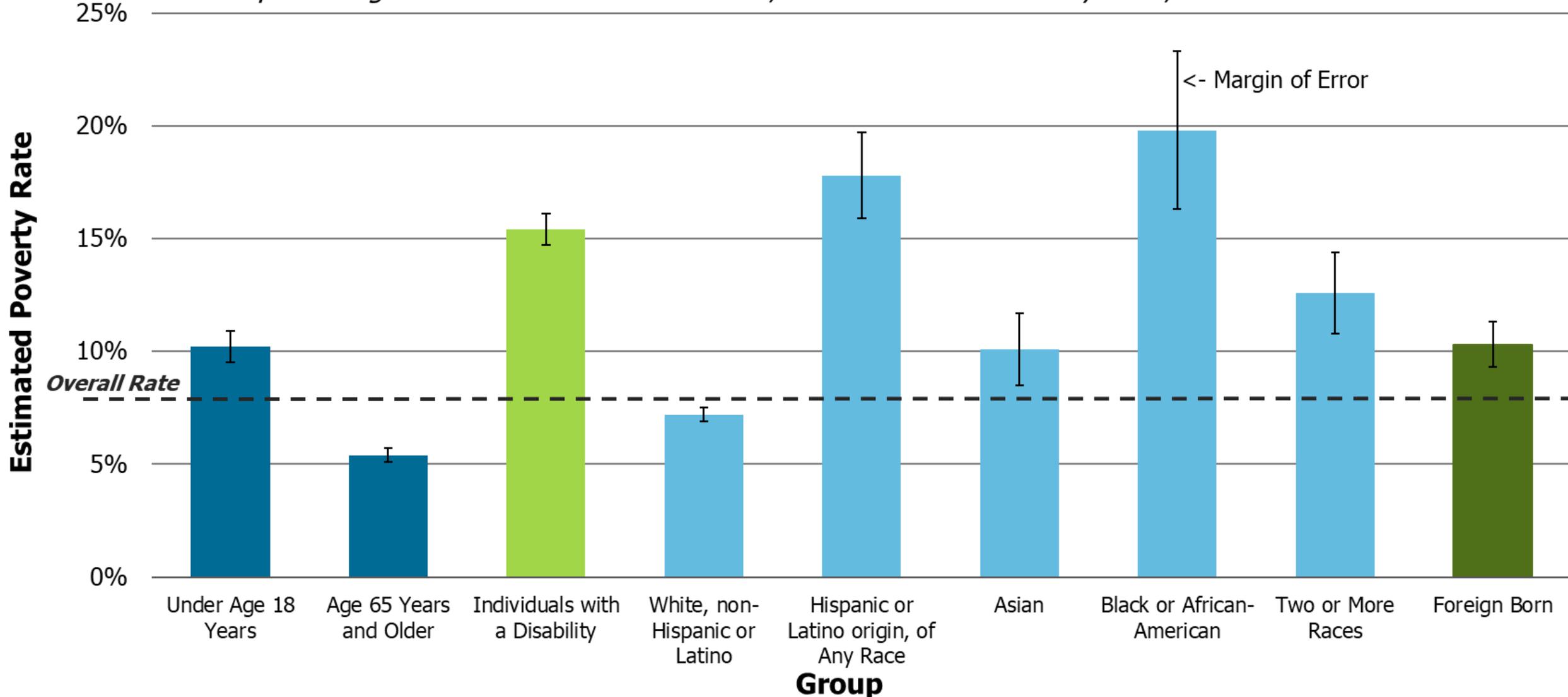
New Hampshire, 2014-2018

Source: U.S. Census Bureau, American Community Survey Five-Year Data



New Hampshire Poverty Rates by Group

Hispanic Origin Included in Non-White Races, Census-Defined Disability Used, 2014-2018 Estimates

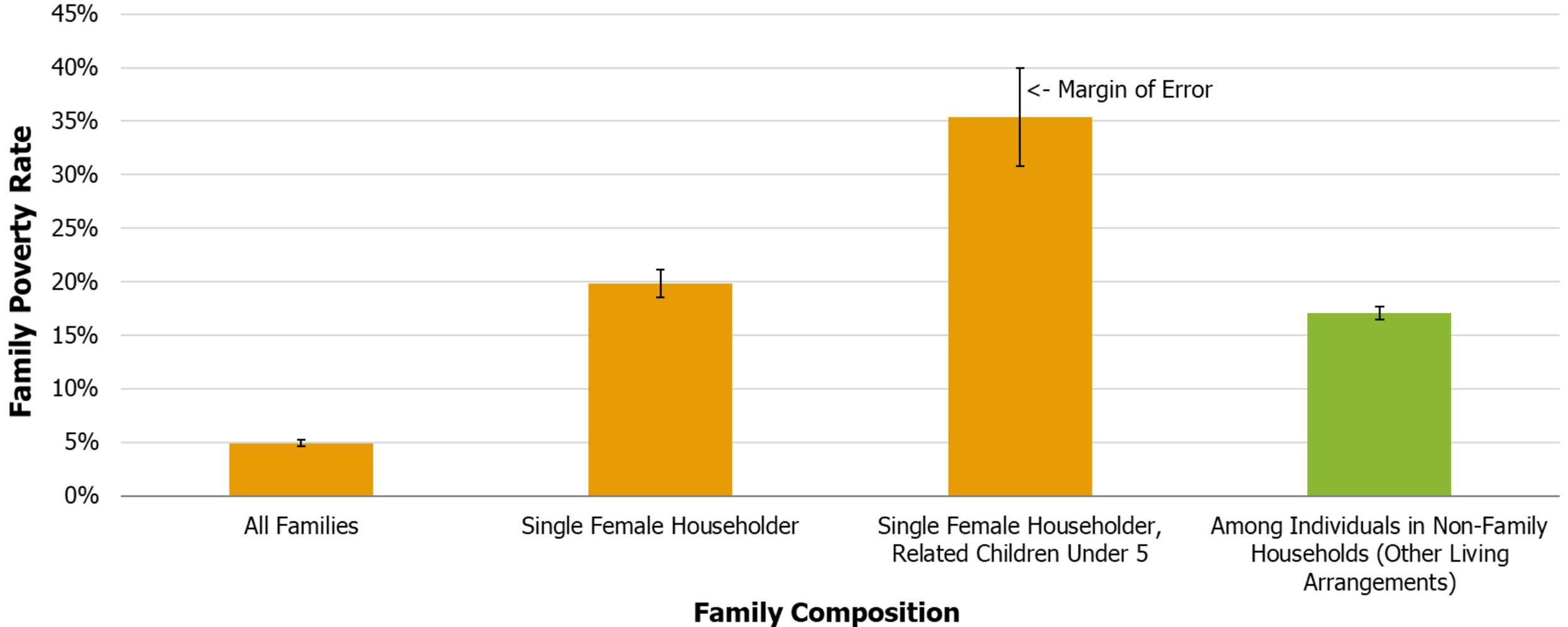


Note: Margins of Error represent 90 percent confidence intervals

Source: U.S. Census Bureau, American Community Survey Five-Year Estimates, 2014-2018

Poverty Rates by Family Composition

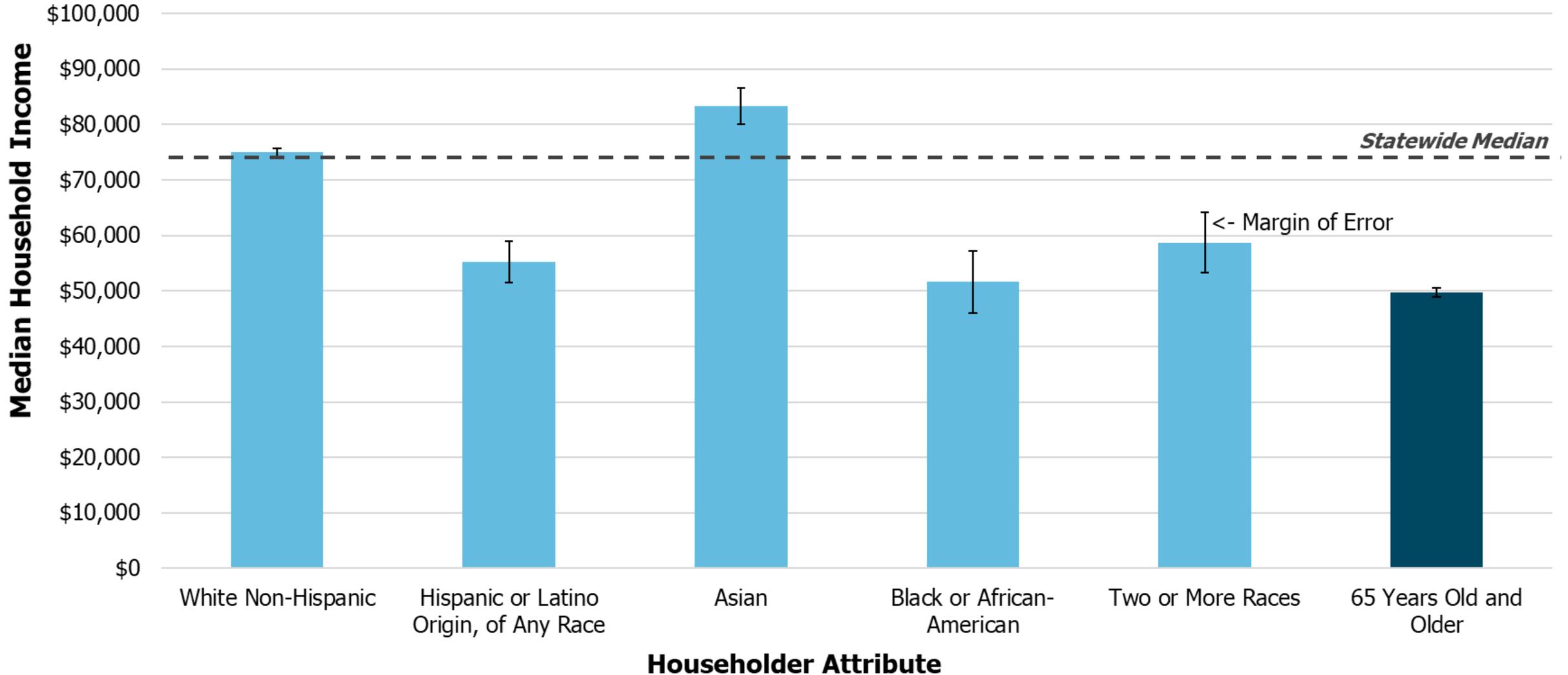
New Hampshire, Estimated for 2014-2018



Note: Margins of Error represent 90 percent confidence intervals
Source: U.S. Census Bureau, American Community Survey Five-Year Estimates, 2014-2018

Median Household Incomes by Householder Attribute

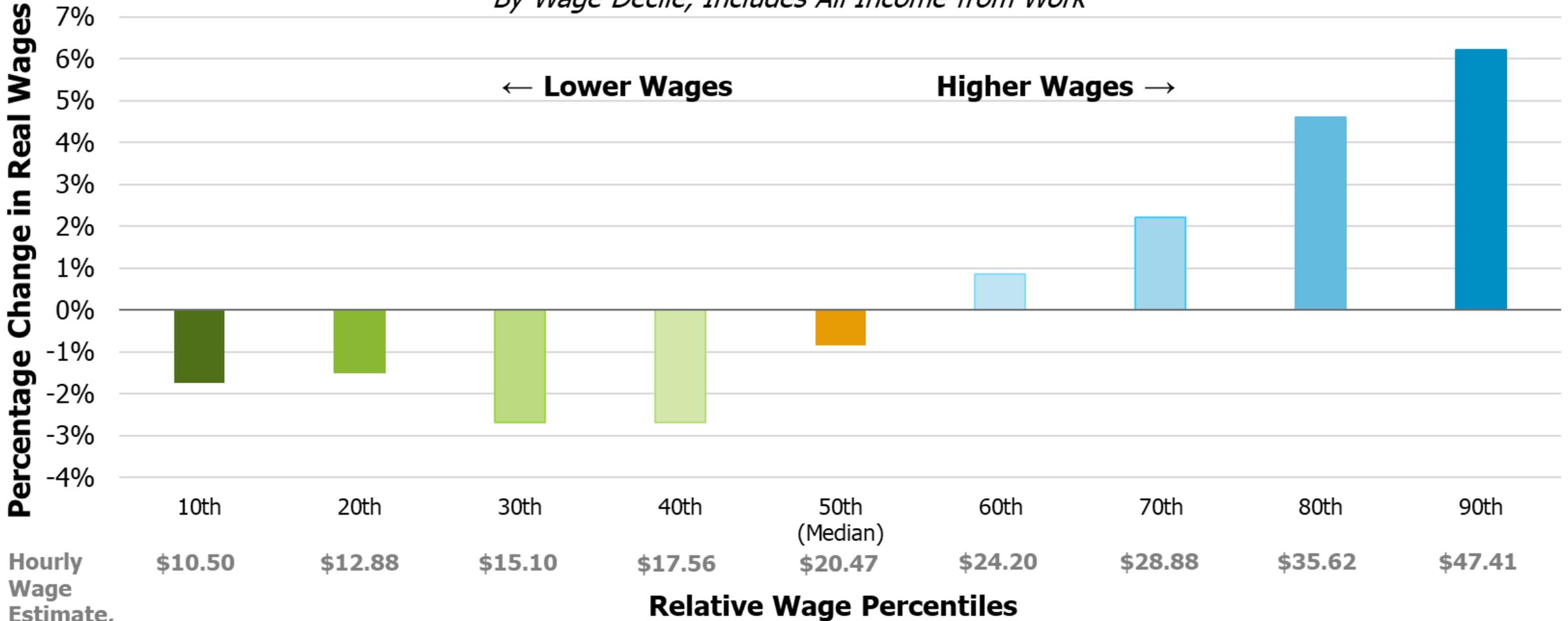
*Hispanic Origin Included in Non-White Races,
New Hampshire, Estimated for 2014-2018*



Note: Margins of Error represent 90 percent confidence intervals
Source: U.S. Census Bureau, American Community Survey Five-Year Estimates, 2014-2018

Recovery Has Been Uneven, Not Lifted All Wages Equally

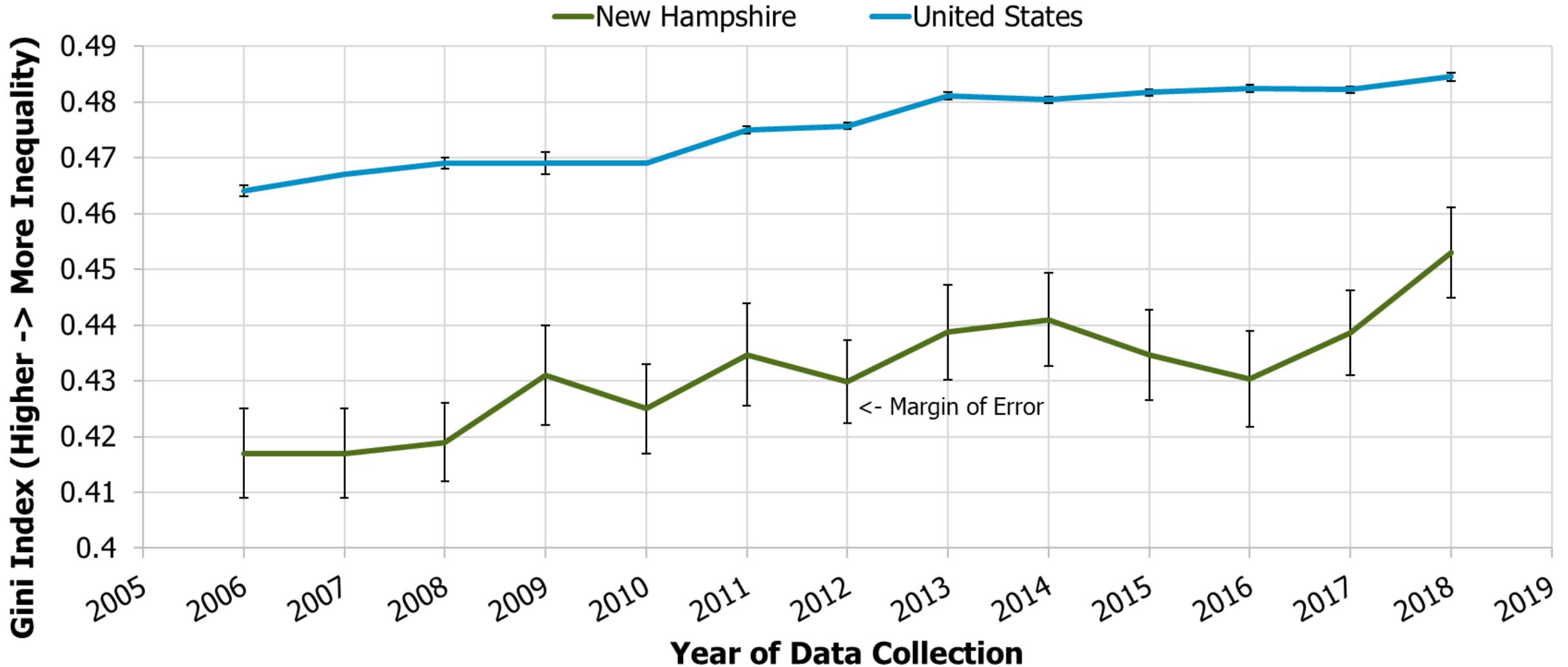
*Changes in Inflation-Adjusted New Hampshire Wages from 2004-2006 to 2016-2018 Averages
By Wage Decile, Includes All Income from Work*



Note: Inflation adjustment using Consumer Price Index-Urban-Research Series (current methods). Includes workers aged 18 to 64 years.
Source: Economic Policy Institute analysis of Current Population Survey Outgoing Rotation Group data

Gini Index of Income Inequality Between Households

Measure of Income Inequality in New Hampshire and the United States, with Margins of Error



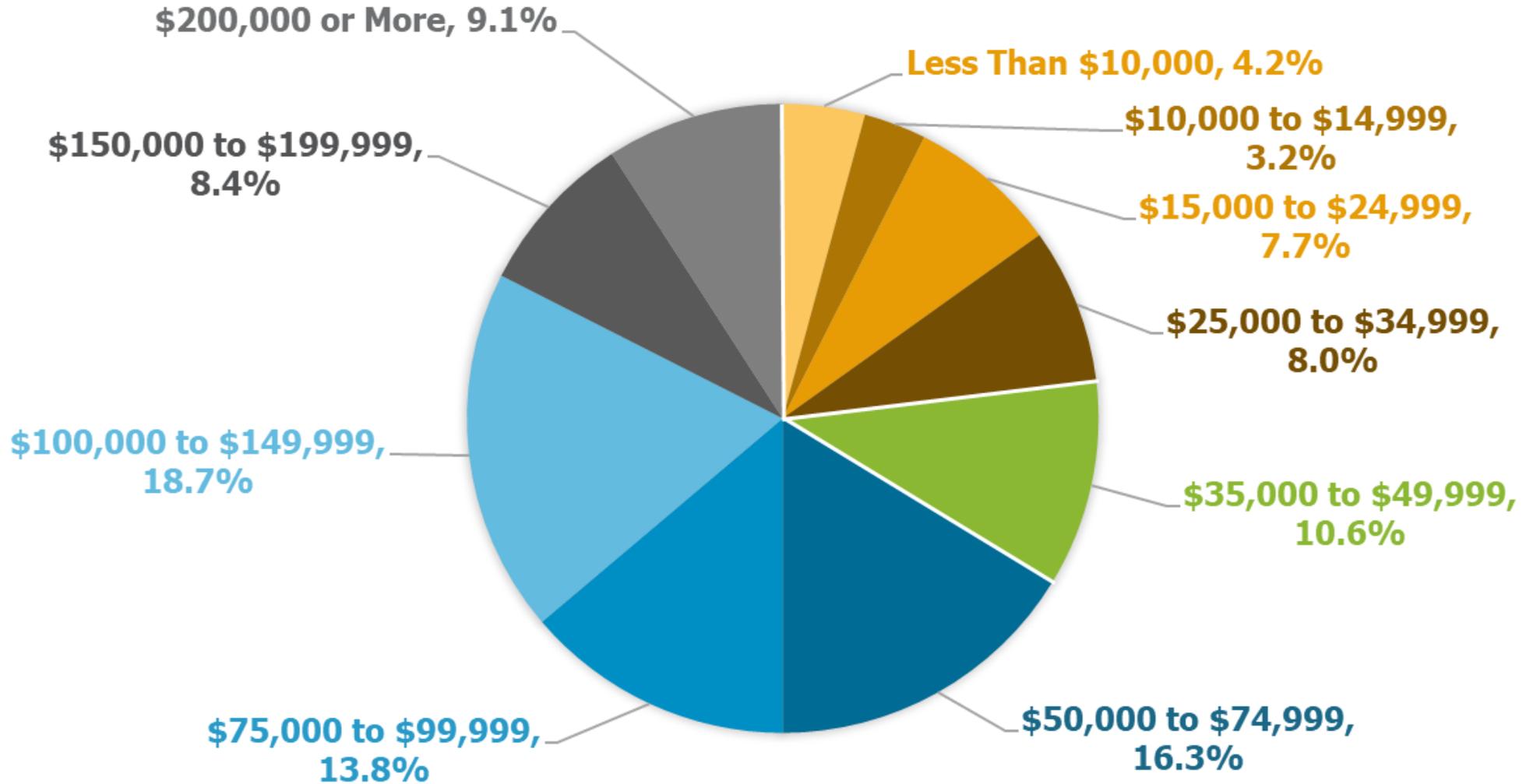
Note: Margins of Error represent 90 percent confidence intervals

Source: U.S. Census Bureau, American Community Survey, One-Year Estimates

Percentage of New Hampshire Households by Income Group

Source: U.S. Census Bureau, American Community Survey, 2018 Data

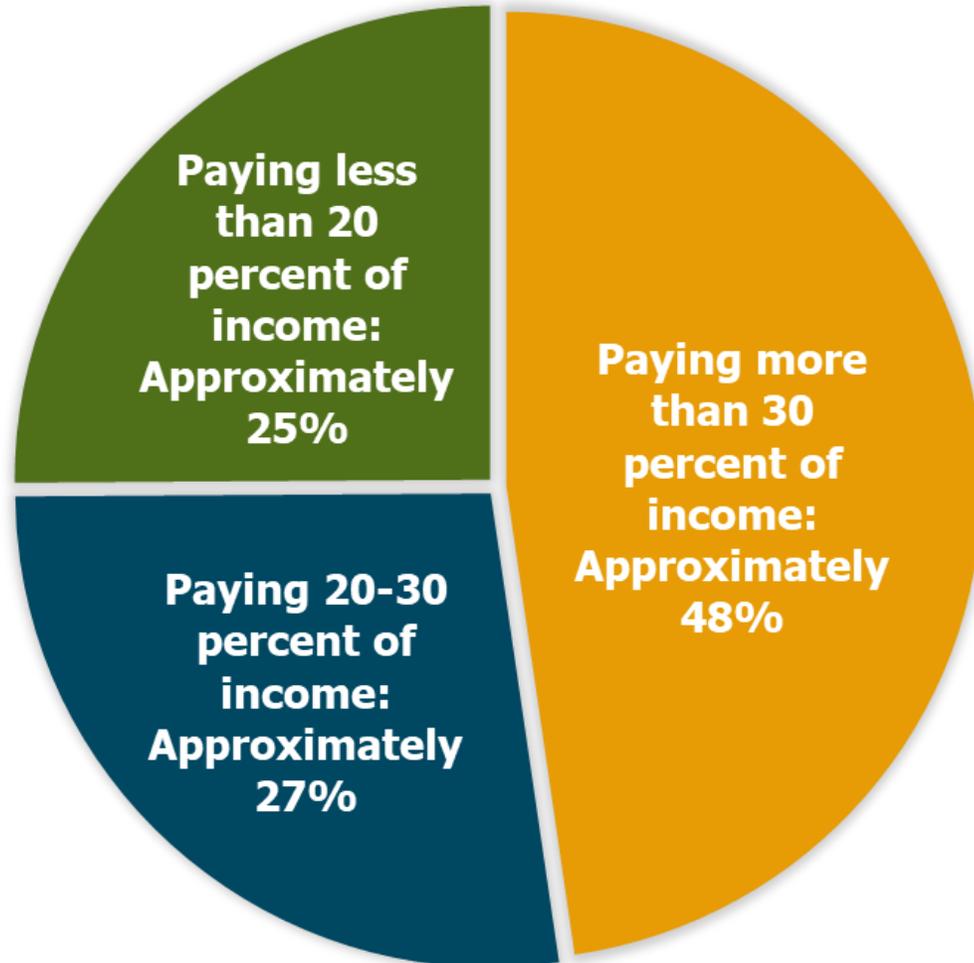
Note: Estimates for 531,212 Households



Rent as a Percentage of Estimated Household Income

*Estimates For All New Hampshire Renter Households,
Gross Rent Including Utilities*

Source: U.S. Census Bureau, American Community Survey,
2018 One-Year Estimates



- Two-bedroom apartment statewide median monthly rent and utilities cost in 2019: **\$1,347**
- Renter-occupied unit median household income in New Hampshire estimated at **\$41,071** for 2018
- Owner-occupied unit median household income in New Hampshire estimated at **\$91,608** for 2018

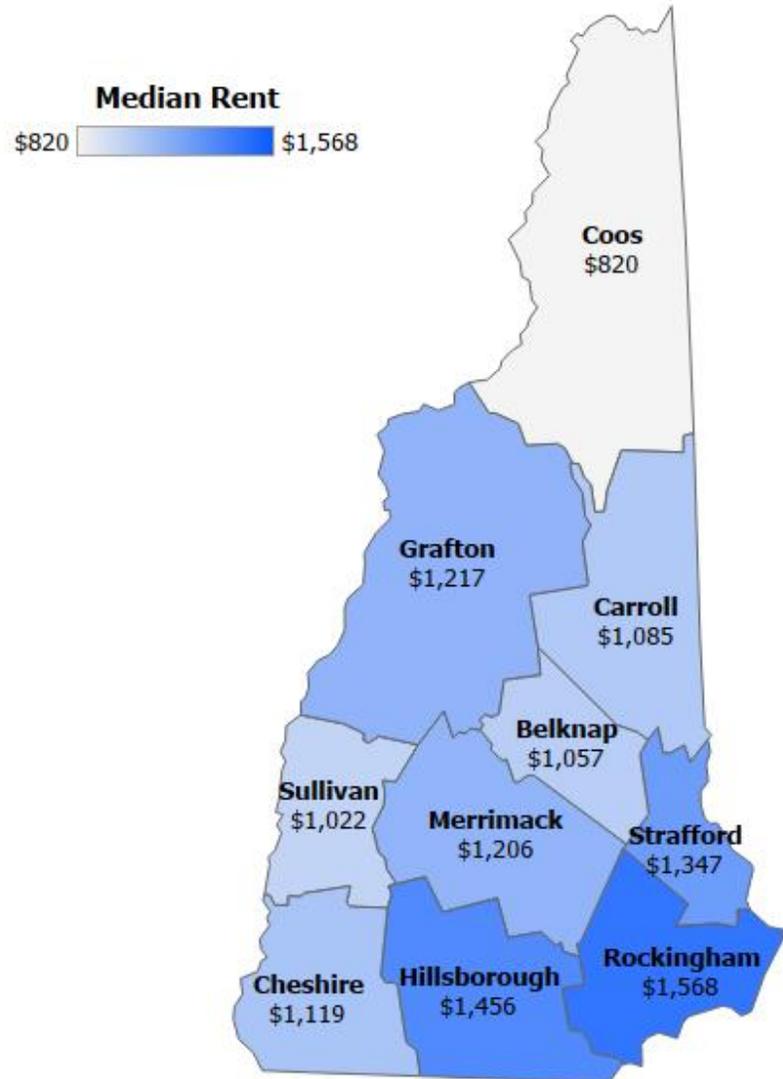
Sources: New Hampshire Housing Finance Authority, *2019 New Hampshire Residential Rental Cost Survey*, U.S. Census Bureau, American Community Survey, 2018 One-Year Estimates

Housing Costs Vary Throughout the State

Median Rent for Two-Bedroom Apartments

2019 New Hampshire Residential Rental Cost Survey, Includes Utilities

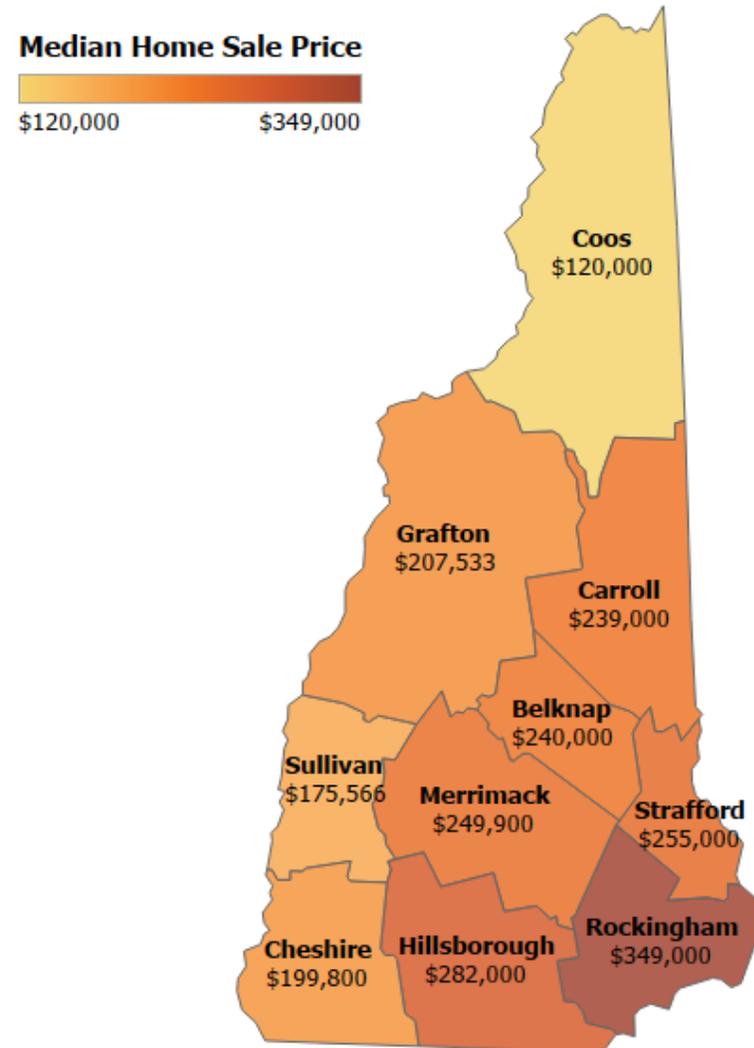
Source: New Hampshire Housing Finance Authority



Median Home Purchase Price

2019 Preliminary Data

Source: New Hampshire Housing Finance Authority

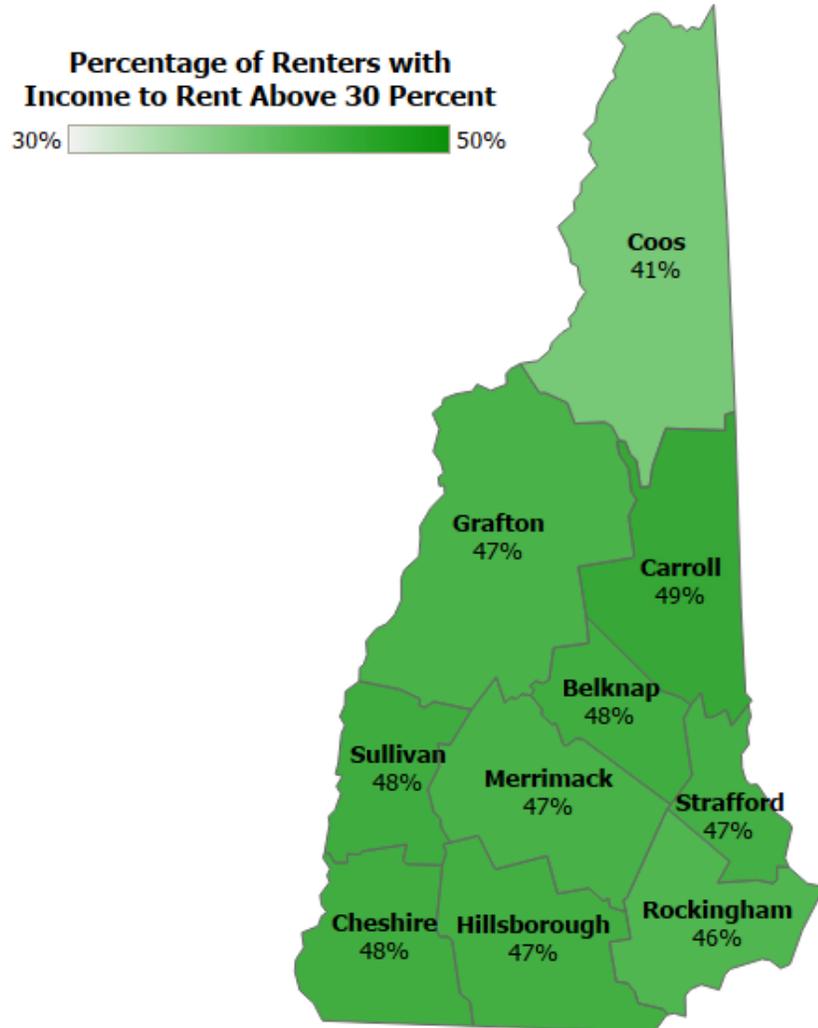


Housing Costs High Relative to Incomes

Percent of Renters Paying High Rents Relative to Income

Portion of Renters Paying 30 Percent or More of Income to Rent and Utilities, 2014-2018

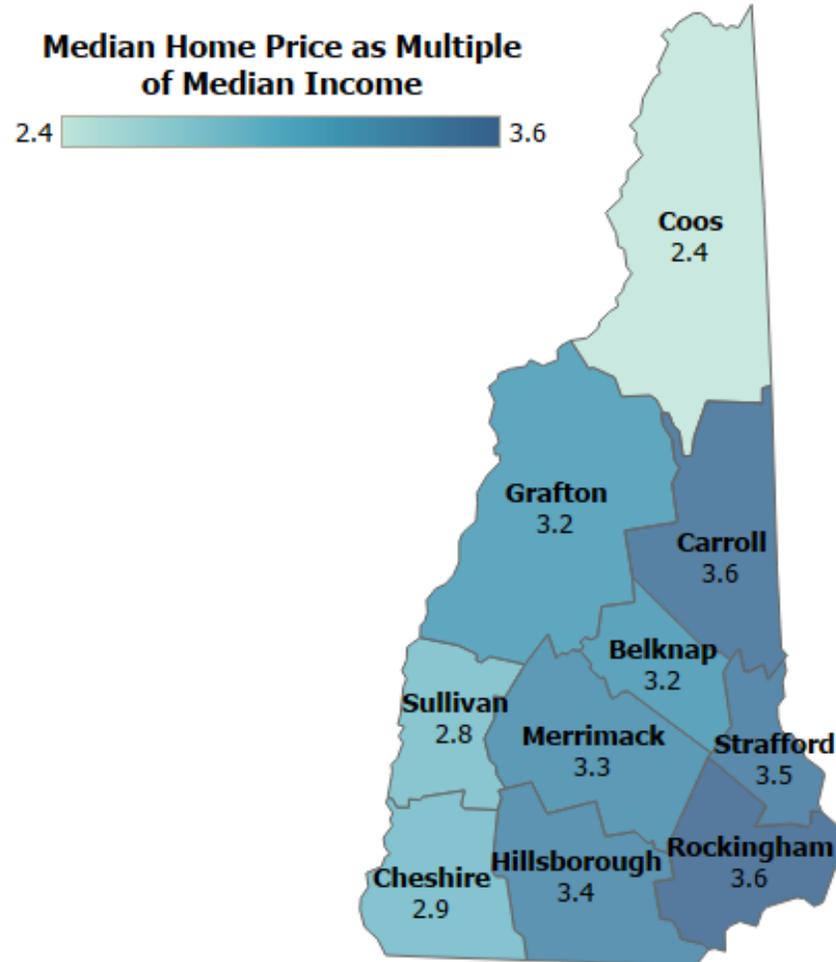
Source: U.S. Census Bureau, American Community Survey, Five-Year Data 2014-2018



Years of Median Household Income Needed for Median Home Purchase Price

Median Household Income Estimates by County in 2018 Dollars, 2018 Median Home Purchase Price

Source: U.S. Census Bureau, American Community Survey, Five-Year Data 2014-2018; New Hampshire Housing Finance Authority, 2018 Median Home Purchase Price



Housing and the State Budget

- Dedicated funding of \$5 million per year for the Affordable Housing Fund
- Eviction prevention assistance with rent: \$2 million
- Rapid re-housing to prevent homelessness, improve affordable housing, collaboratively increase transitional housing: \$1 million
- Homeless shelter case management: \$1 million
- Outreach and supports for homeless youth: \$400,000
- Lead Paint Hazard Remediation Fund: \$3 million
- Housing Appeals Board

For more information, see NHFPI's Issue Brief *The State Budget for Fiscal Years 2020 and 2021*.

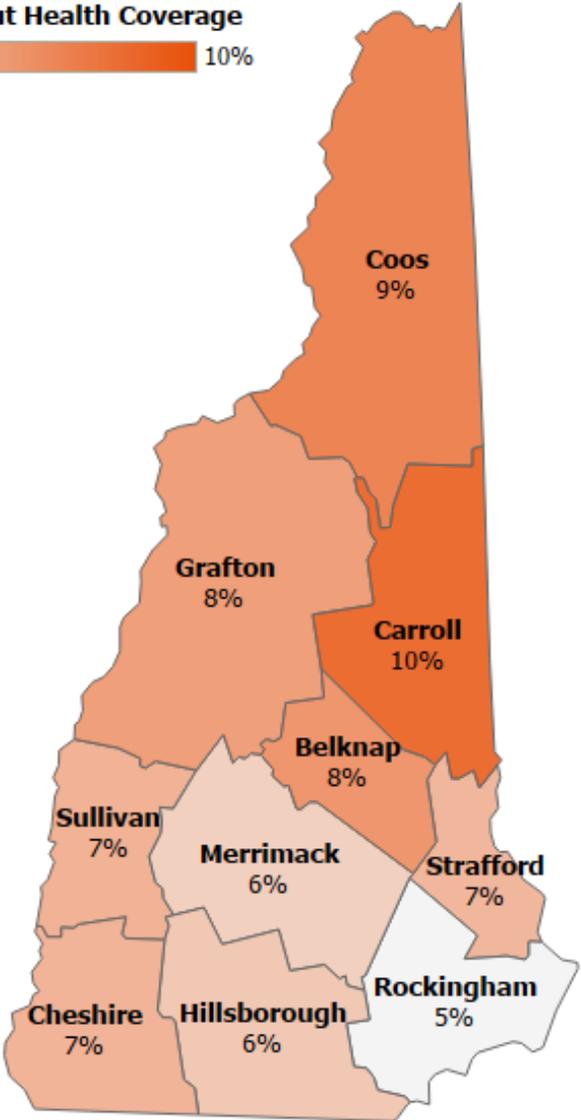
Access to Health Coverage Varies

Percentage of Population Without Health Coverage

By New Hampshire County, 2014-2018

Source: U.S. Census Bureau, American Community Survey, Five-Year Estimates 2014-2018

Percentage without Health Coverage

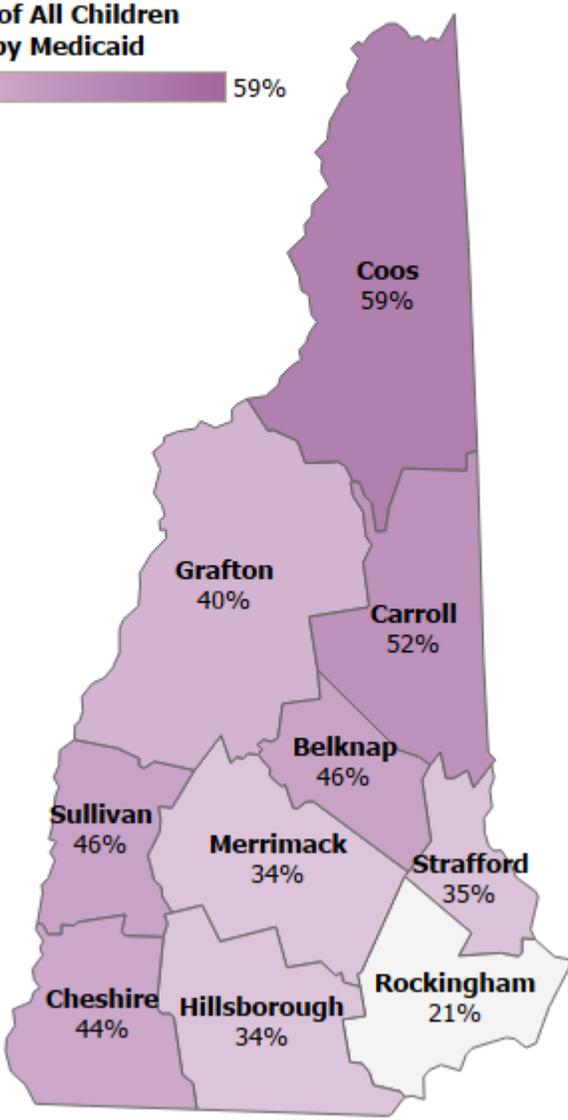


Estimated Percentage of All Children Covered by Medicaid

By New Hampshire County, July 2018

Sources: New Hampshire Department of Health and Human Services; U.S. Census Bureau, Population Estimates Program

Percentage of All Children Covered by Medicaid

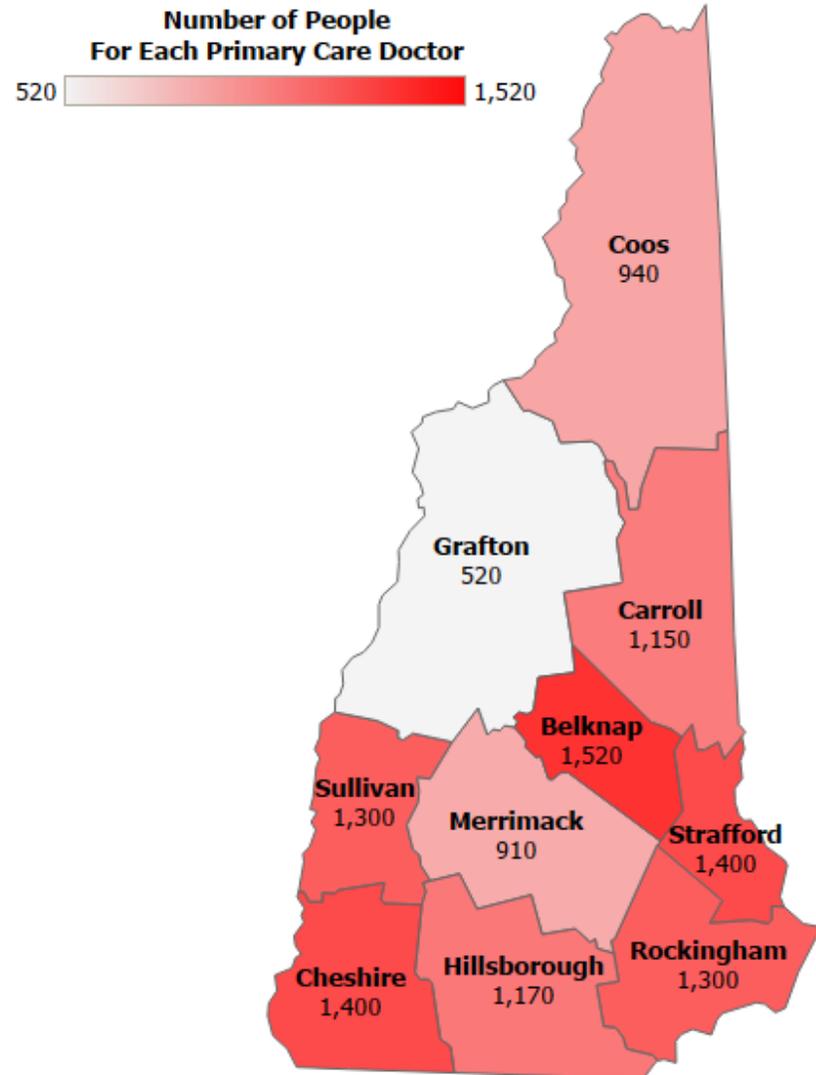


Concentrations of Health Providers Vary Regionally

Population Per Primary Care Physician

Ratio by New Hampshire County, 2016

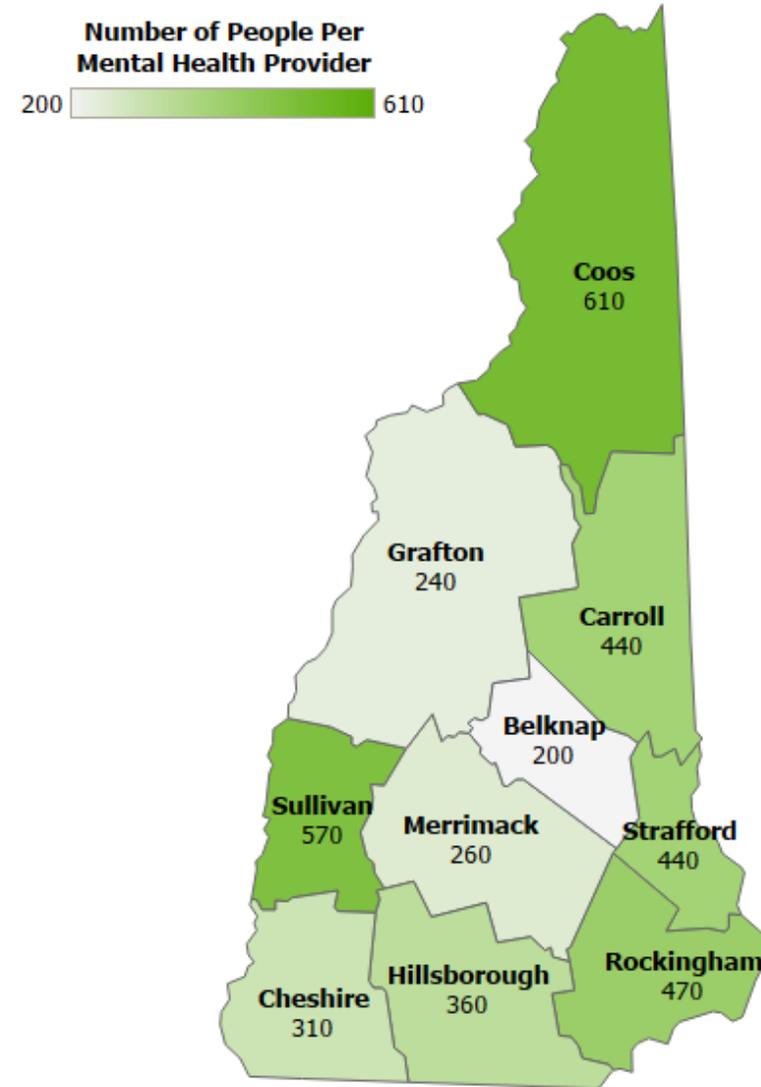
Source: University of Wisconsin Population Health Institute,
Area Health Resource File and the American Medical Association



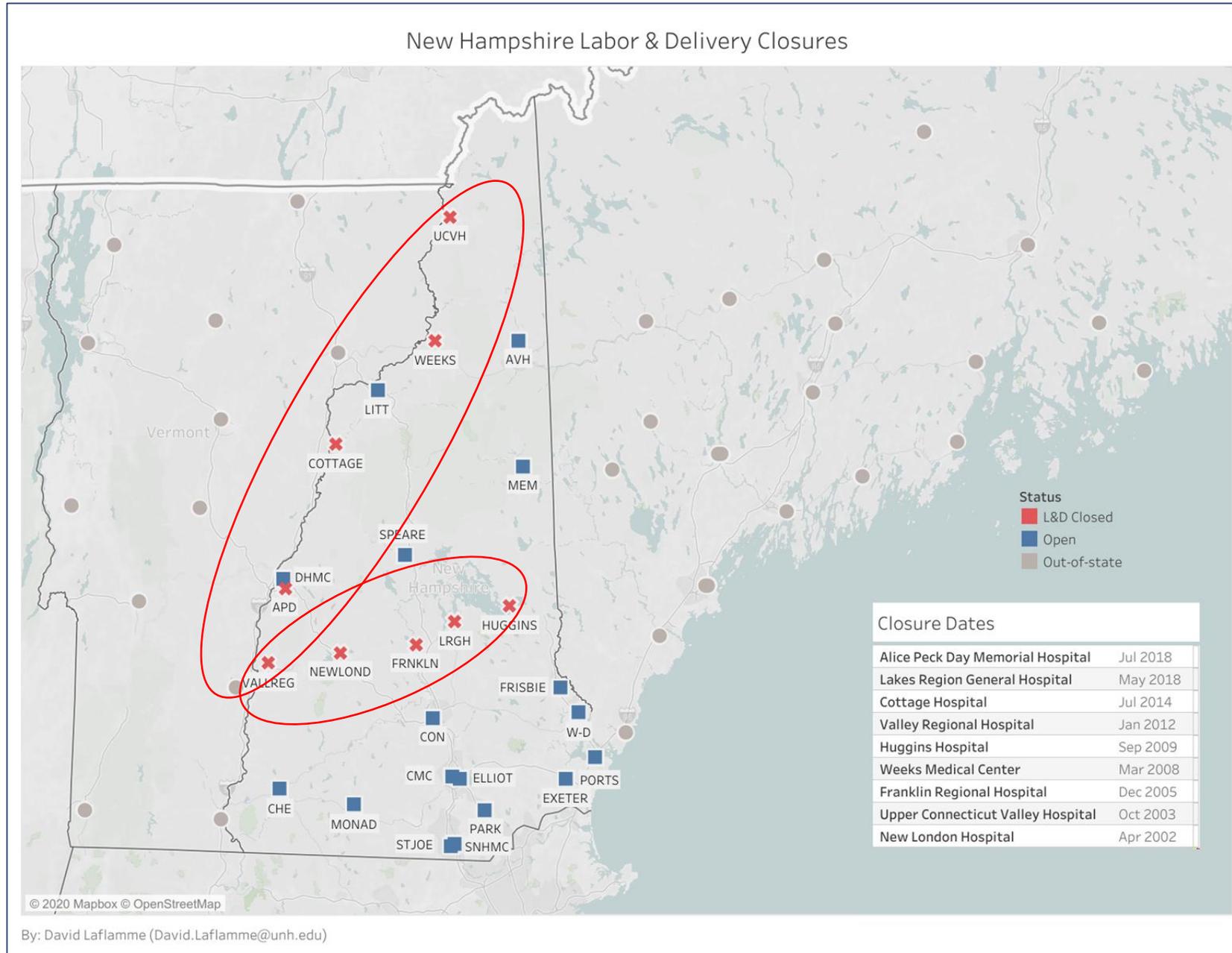
Population Per Mental Health Care Provider

Ratio by New Hampshire County, 2018

Source: University of Wisconsin Population Health Institute,
U.S. Center for Medicare and Medicaid Services data, 2018



Birth Unit Closures in New Hampshire, 2002 to 2018

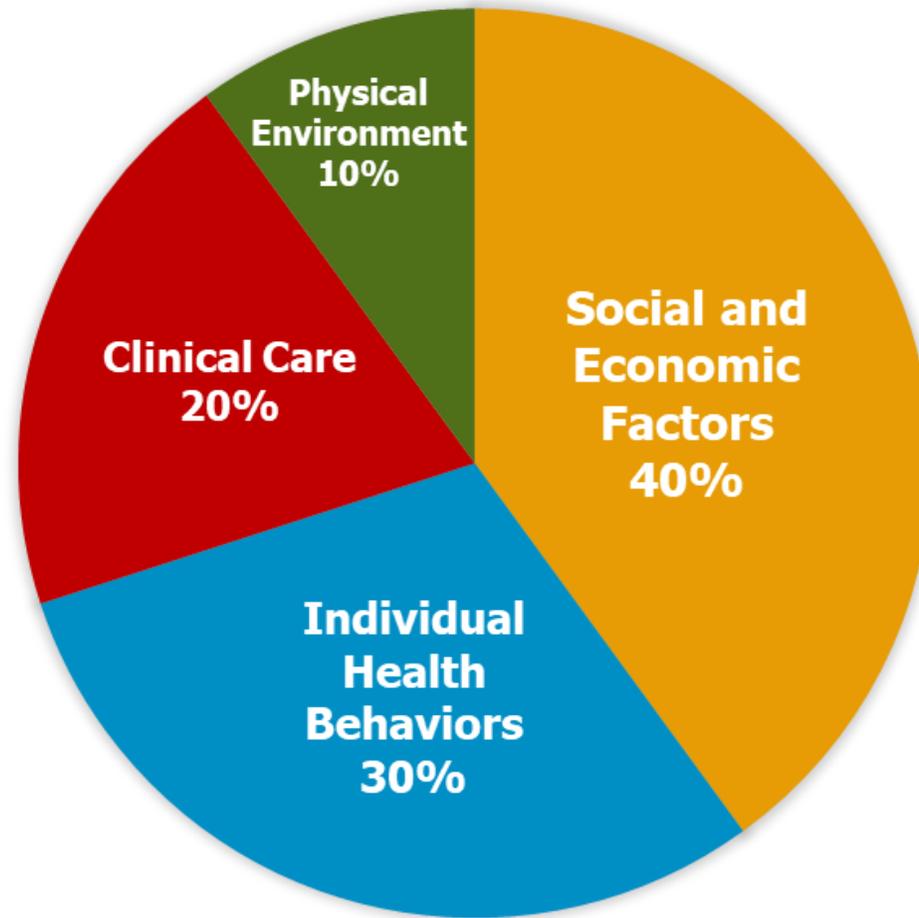


Source: New Hampshire Department of Health and Human Services

Social Determinants Key to Health

County Health Rankings Model

Source: University of Wisconsin Population Health Institute



Health and the State Budget

- Increase for Medicaid reimbursement rates: \$31 million in State funds, to be matched by federal funds
- Developmental services: total increase of \$127.8 million
- Substance use disorder services: \$12 million in federal funds, \$1 million in State funds for treatment and housing facilities, \$450,000 for shelter and stabilization services
- Mental health: \$8.75 million for secure psychiatric hospital, \$5 million for separate facility for children, \$4 million to expand NH Hospital adult capacity, \$5 million for 40 transitional beds, statewide mobile crisis units for children
- Dental care in Medicaid, starting April 2021: \$500,000

For more information, see NHFPI's Issue Brief *The State Budget for Fiscal Years 2020 and 2021*.

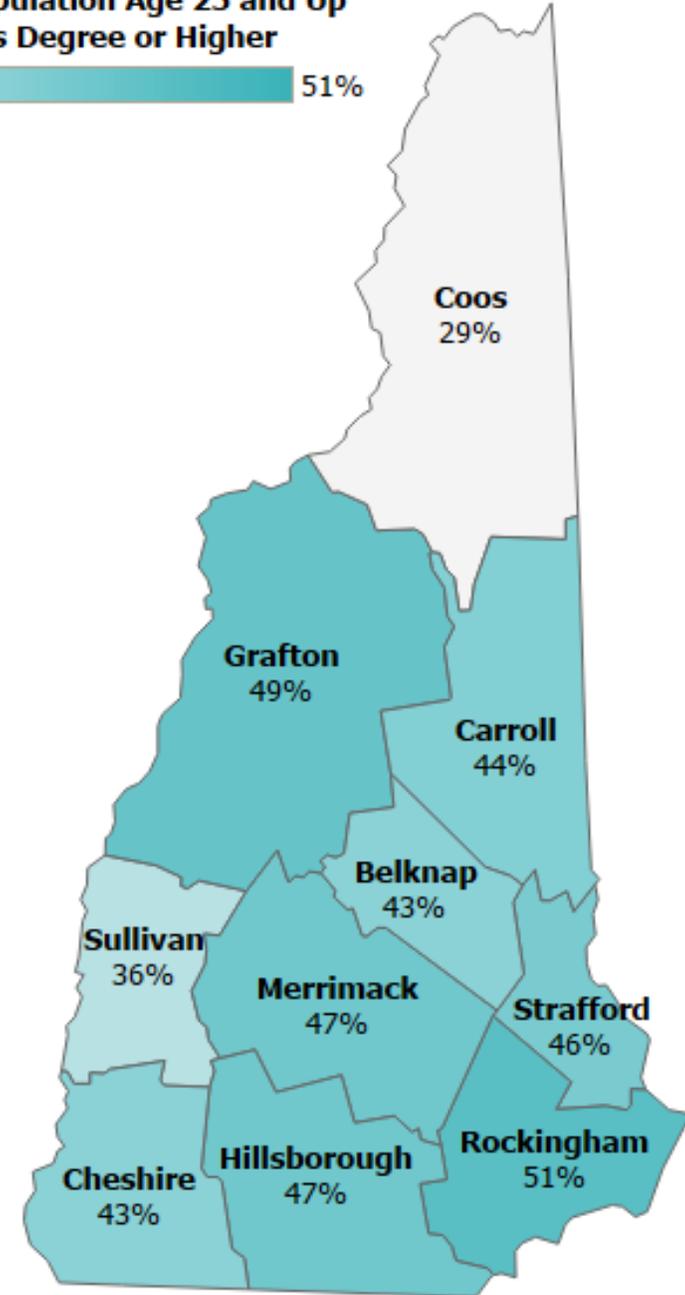
County-Level Educational Attainment, 2014-2018

Population Ages 25 and Up With an Associate's Degree or Higher, New Hampshire Counties

Does Not Include Non-Degree Certificates, Apprenticeships, or Other Non-Degree Training

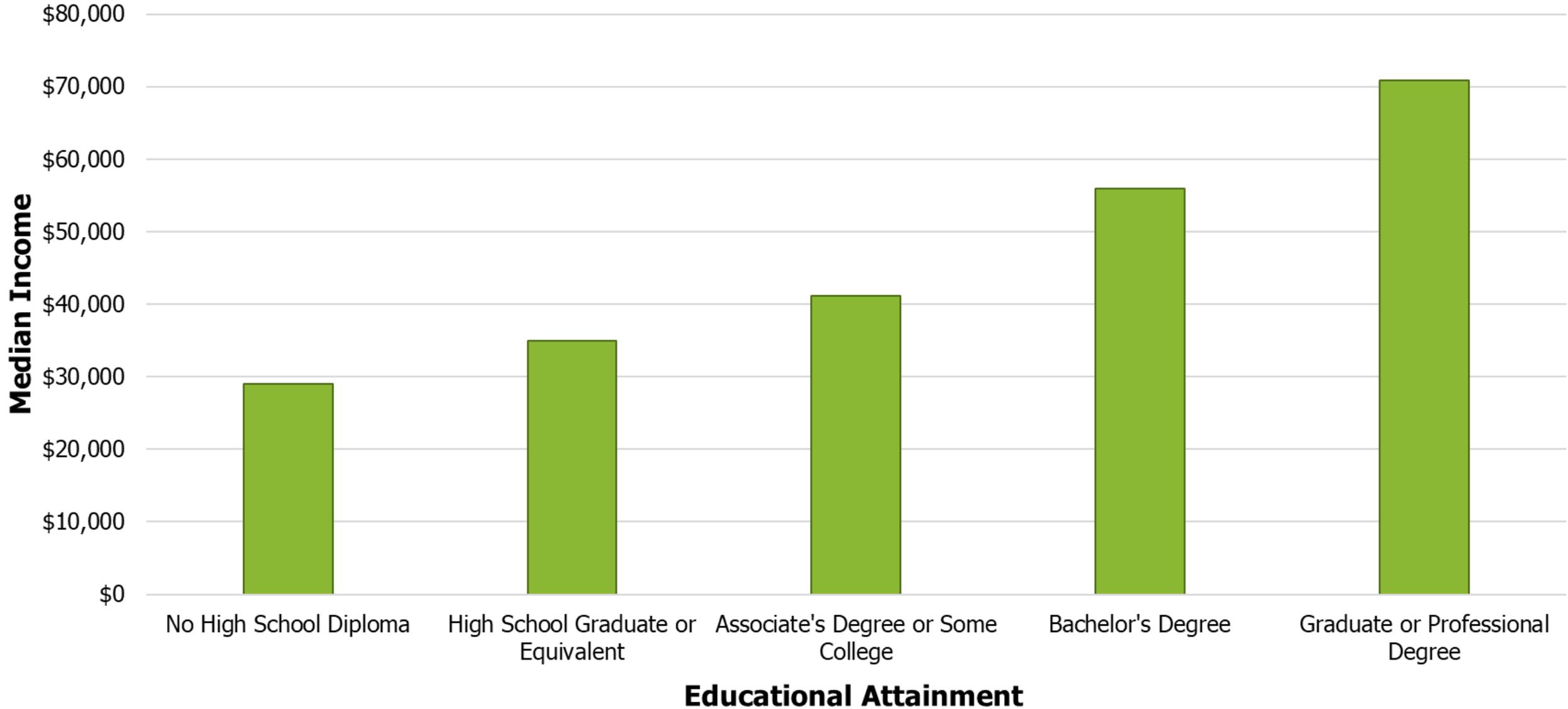
Source: U.S. Census Bureau, American Community Survey, Five-Year Data, 2014-2018

Percentage of Total Population Age 25 and Up with an Associate's Degree or Higher



Median Income by Educational Attainment in New Hampshire

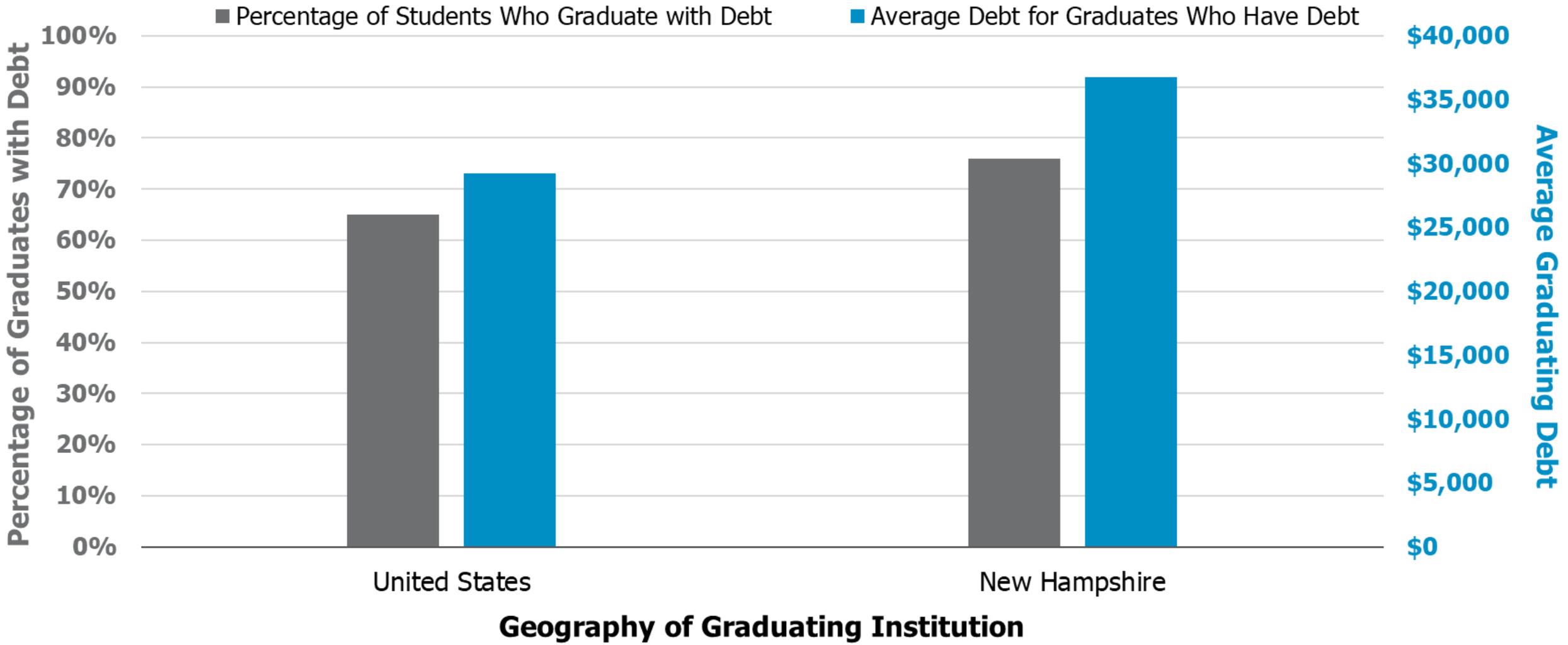
Median Annual Income for Those Aged 25 Years and Older with Earnings, 2014-2018



Source: U.S. Census Bureau, American Community Survey Five-Year Data

Student Debt in New Hampshire and the United States

Students Graduating from Four-Year Institutions, by Geography of Institution, Class of 2018



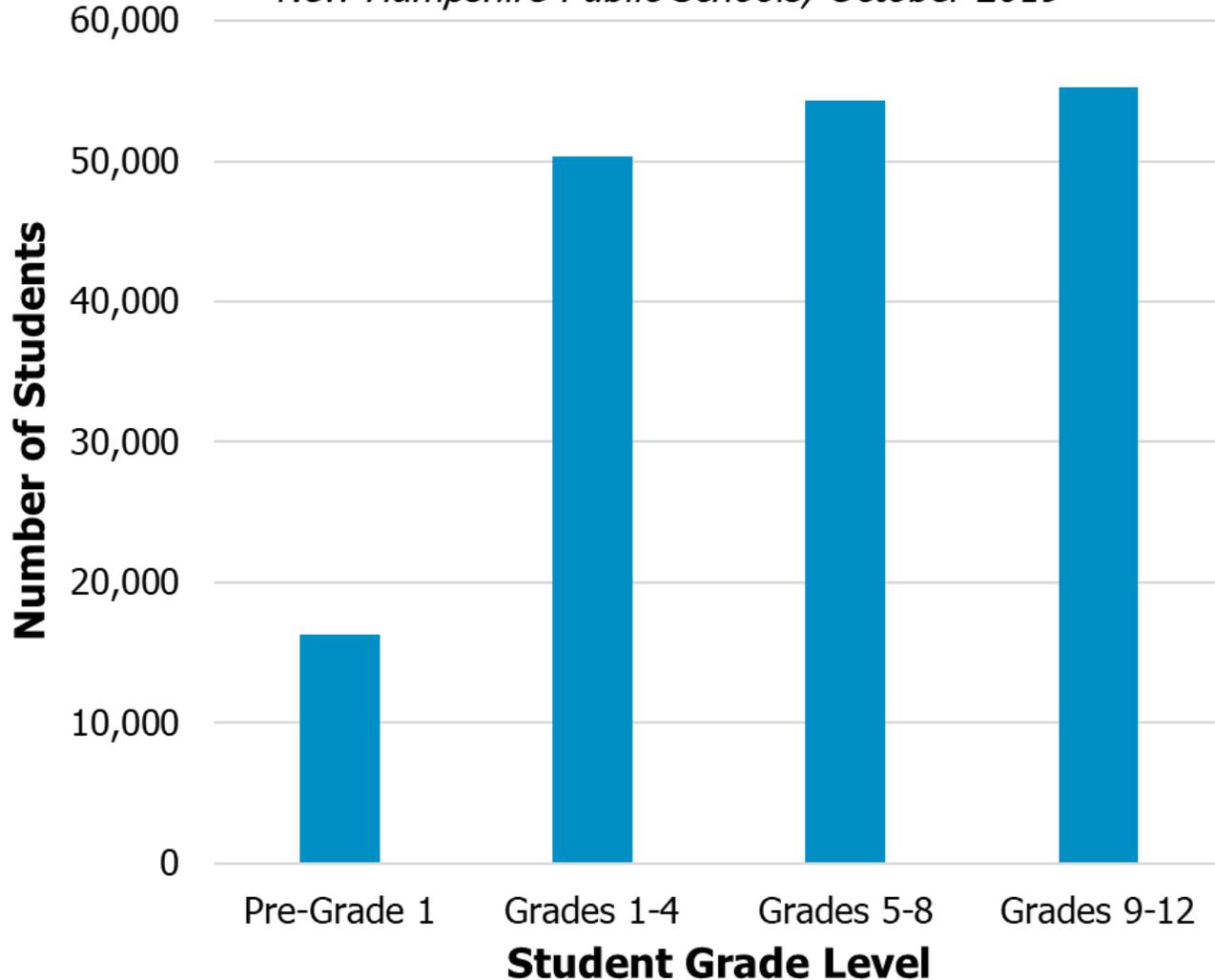
Note: Voluntary reporting by institutions; usable data for New Hampshire included institutions enrolling 92 percent of students.

Source: The Institute for College Access and Success, *Student Debt and the Class of 2018*, September 2019

Public School Enrollment in New Hampshire

Student Enrollment by Grade

New Hampshire Public Schools, October 2019



Source: New Hampshire Department of Education

In October 2019:

- 176,168 students in public schools statewide
- 38,624 students (24.8 percent) eligible for free or reduced-price meals in Grades 1-12
- 27,999 of the free and reduced-price eligible students were in Grades 1-8 (27.4 percent of age group)
- 4,626 students (2.6 percent) identified as having limited English proficiency

Source: New Hampshire Department of Education

Resource Capacity for Local Public Education

Percentage of Students Eligible for Free and Reduced Price Meals

Percentage of All Resident Students by Municipality, 2019-2020

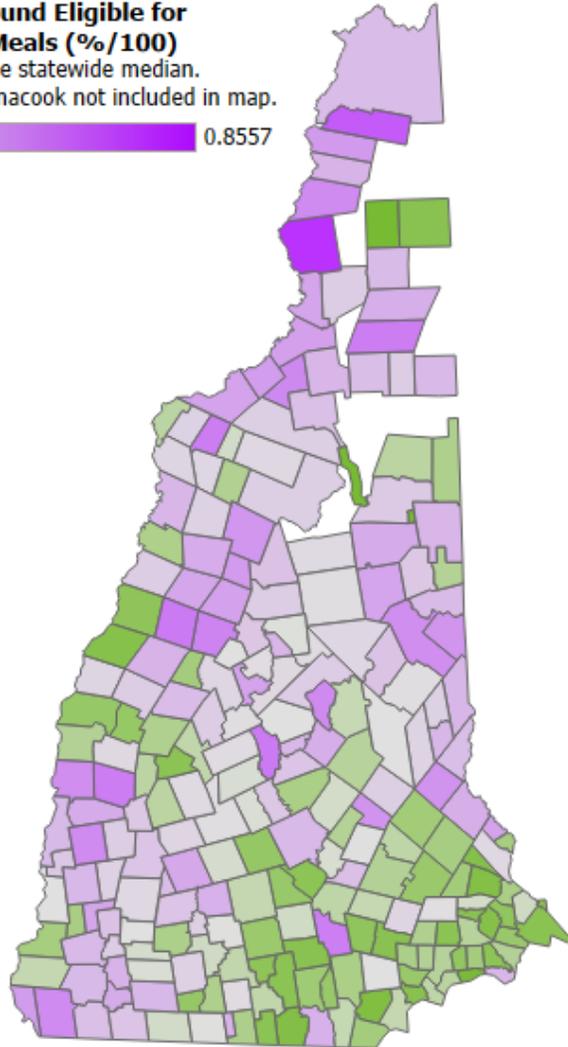
Source: New Hampshire Department of Education

Portion of Population Found Eligible for Free or Reduced Price Meals (%/100)

Notes: Colors shifted around the statewide median.

Communities with no students and Penacook not included in map.

0.0000 0.8557



Taxable Property Wealth Per Resident Student

Equalized Valuation Per Pupil, 2018-2019

Source: New Hampshire Department of Education

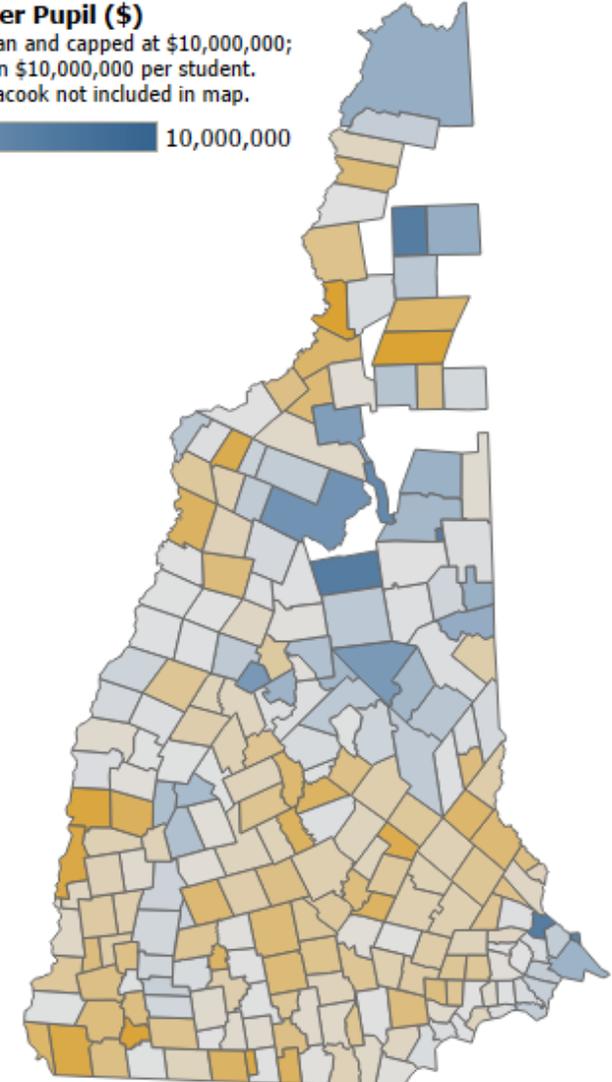
Equalized Valuation Per Pupil (\$)

Notes: Colors shifted around statewide median and capped at \$10,000,000;

four communities have values higher than \$10,000,000 per student.

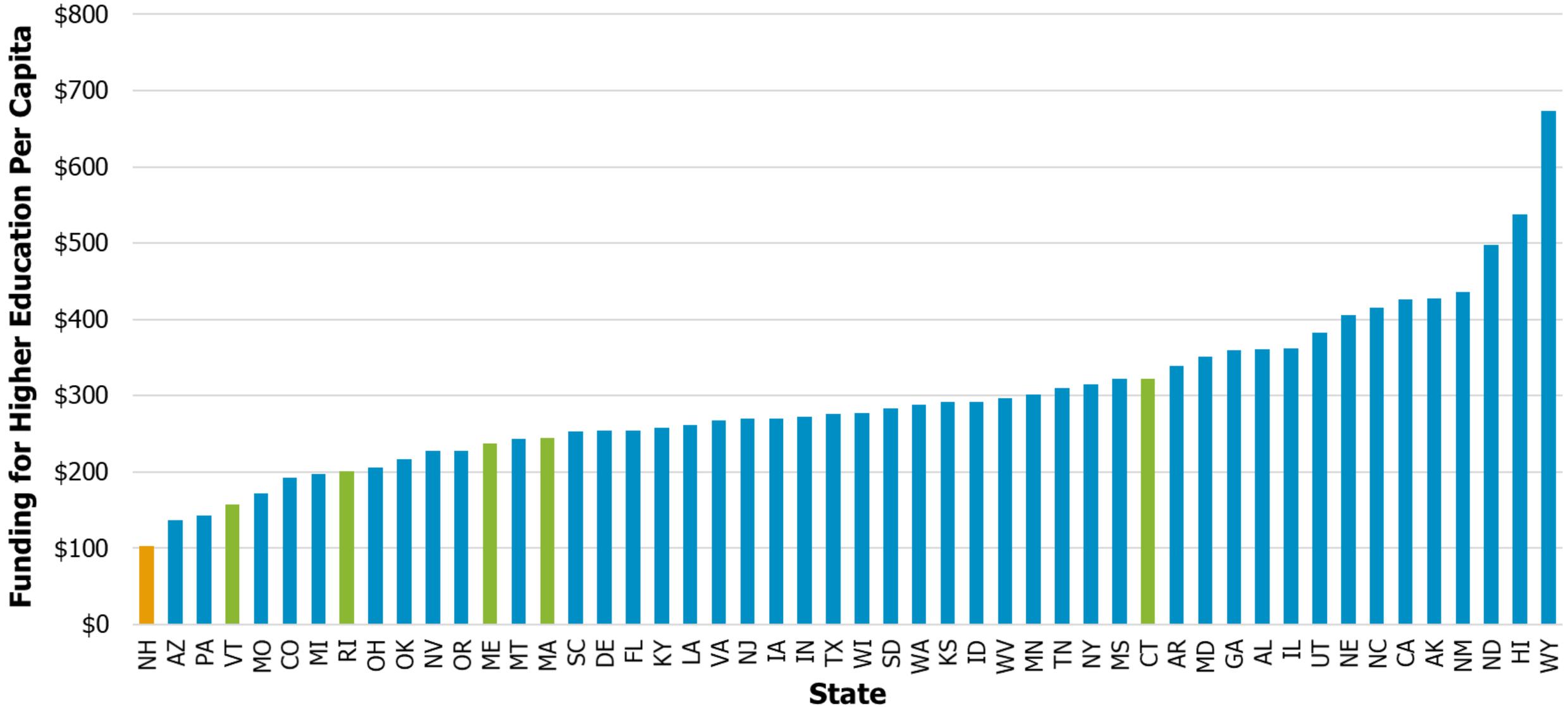
Communities with no students and Penacook not included in map.

364,989 10,000,000



State Public Higher Education Funding Per Capita

Fiscal Year 2020, July 2019 Population Estimates



Source: Illinois State University and the State Higher Education Executive Officers Association, Grapevine, Table 4

Education and the State Budget

- Permanent increase in Stabilization Aid: \$56.6 million
- Permanent increase in full-day kindergarten funding
- One-time funding targeted at communities with lower taxable property wealth per student: \$50 million
- One-time funding for communities with higher percentages of free/reduced price meal students: \$12.5 million
- More school building aid, special education aid
- University System: \$12 million more in operating funds and one-time targeted \$9 million aid
- Community College System: \$10 million more in operating funds, additional \$3.2 million in one-time funds

For more information, see NHFPI's Issue Brief *The State Budget for Fiscal Years 2020 and 2021*.

Key Takeaways

- New Hampshire's population continues to age and diversify
- The benefits of economic growth have not been evenly distributed across people and regions
- Households with certain attributes and racial and ethnic groups face higher levels of poverty
- A lack of affordable housing is a statewide issue, which particularly impacts renters and those with low incomes
- Health access differs based on geography and health coverage
- Resources available to support local education varies between communities
- All these factors influence access to opportunity