



GROWING POPULATION AND CHANGING DEMOGRAPHICS IN NEW HAMPSHIRE & THE SEACOAST

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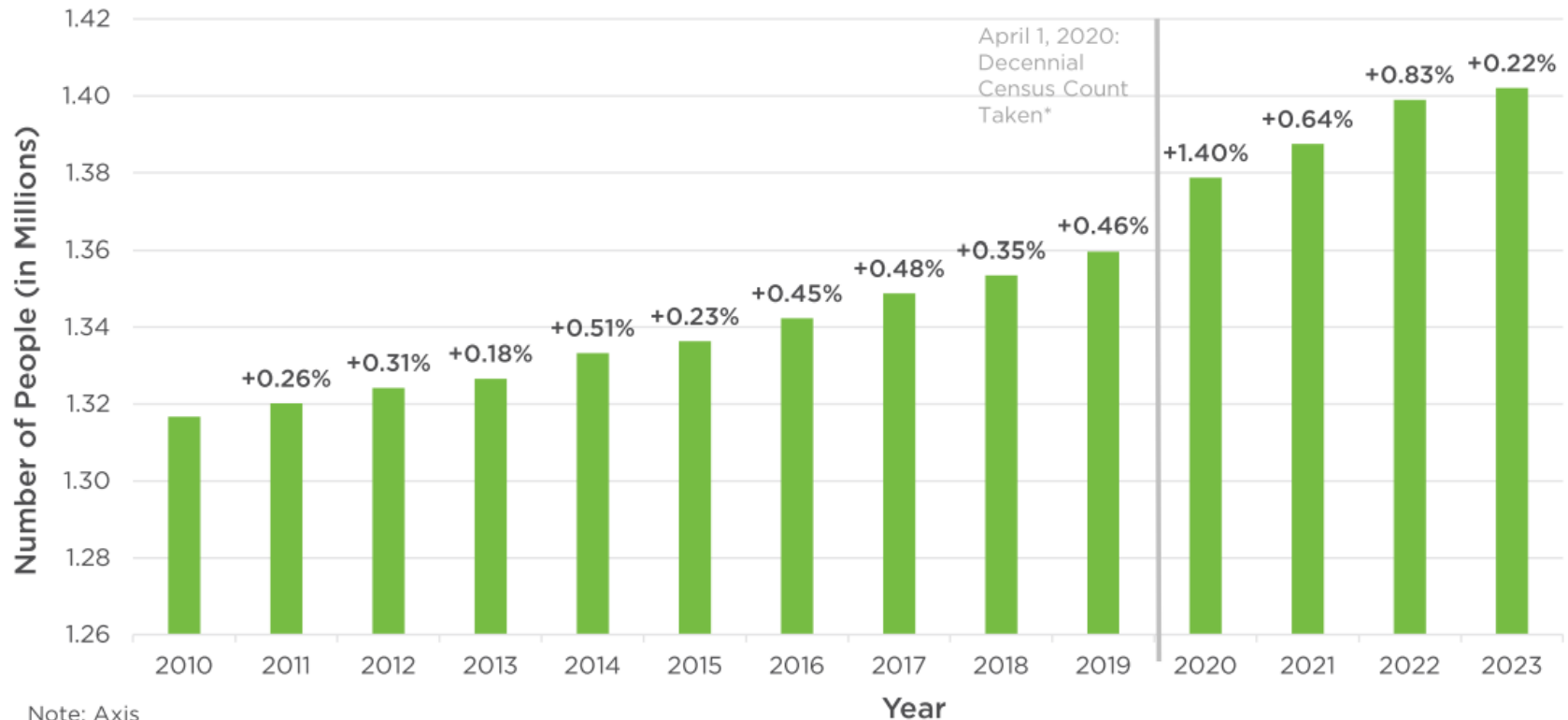
REFLECTION

WHAT WORDS COME TO MIND WHEN YOU
THINK ABOUT NEW HAMPSHIRE
DEMOGRAPHICS?

THE STATE'S POPULATION INCREASED BY ABOUT 6.5 PERCENT, 85,292 PEOPLE, SINCE 2010

NEW HAMPSHIRE POPULATION SIZE FROM 2010 TO 2023

Total Population Count for Each Year, as of July 1



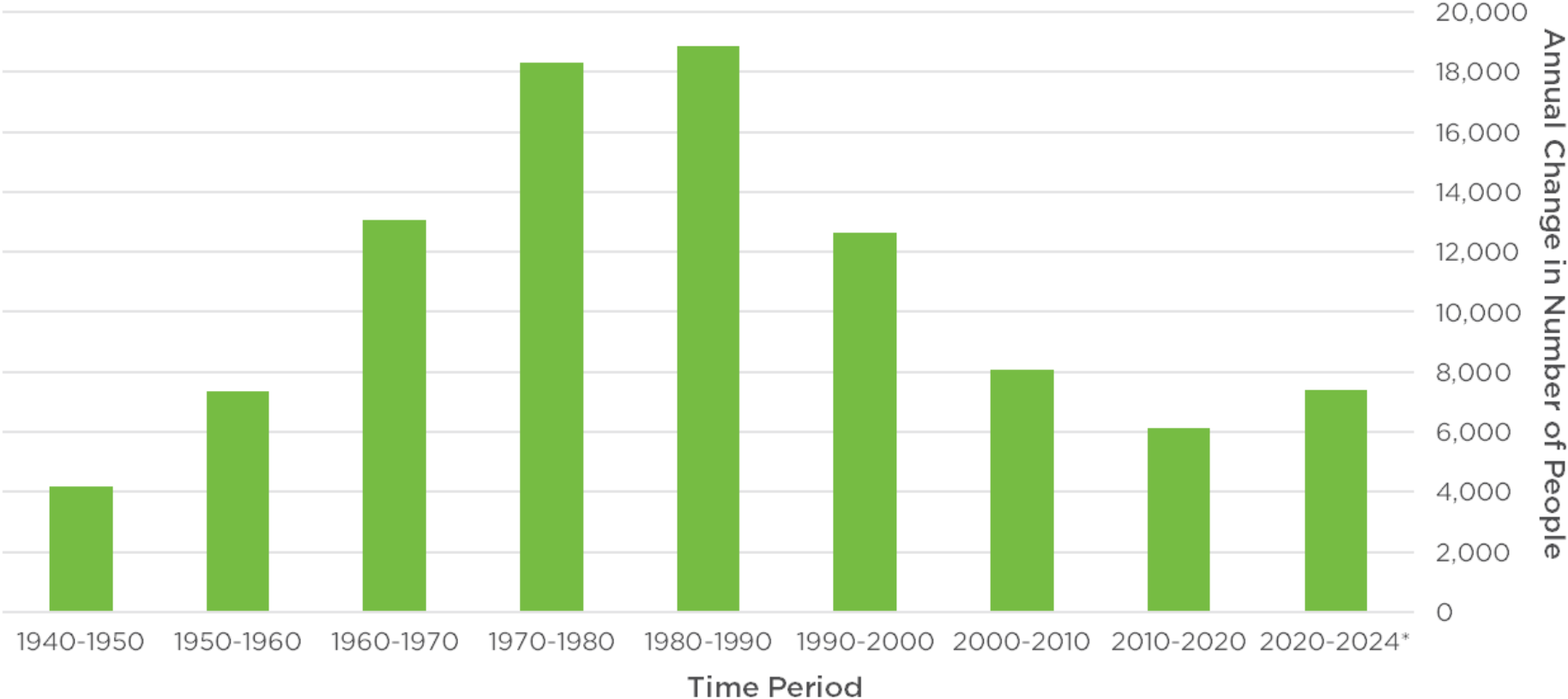
Note: Axis does not start at zero.

*Note: The Decennial Census count taken in 2020 created a new April 1, 2020 population baseline for U.S. Census Bureau annual estimates, which may explain part of the faster population increase between the 2019 and 2020 estimates.

Source: U.S. Census Bureau, Population Estimates Program, July 1, 2010 through July 1, 2023 Estimates

POPULATION GROWTH SLOWING OVER TIME

AVERAGE ANNUAL POPULATION CHANGE IN NEW HAMPSHIRE BY DECADE



*Note: Population Estimates Program total population change from April 1, 2020 to July 1, 2024 divided by 4.25 years.
Source: U.S. Census Bureau, Decennial Counts and Population Estimates Program (2020-2024)

QUIZ QUESTION

**WHICH COUNTIES HAVE GROWN THE
FASTEST SINCE 2020?**

CARROLL COUNTY GREW THE FASTEST, COOS THE SLOWEST

NEW HAMPSHIRE COUNTY POPULATION COUNTS

*Population Estimates and Cumulative Population Change,
from April 1, 2020 to July 1, 2023*

| County | Population Size in July 2023 | Cumulative Population Change from April 2020 |
|------------------|---------------------------------|---|
| Belknap | 65,027 | 1,320 (2.1%) |
| Carroll | 52,448 | 2,343 (4.7%) |
| Cheshire | 77,703 | 1,249 (1.6%) |
| Coos | 31,372 | 112 (0.4%) |
| Grafton | 93,146 | 2,024 (2.2%) |
| Hillsborough | 427,354 | 4,416 (1%) |
| Merrimack | 157,103 | 3,298 (2.1%) |
| Rockingham | 320,689 | 6,509 (2.1%) |
| Strafford | 133,243 | 2,348 (1.8%) |
| Sullivan | 43,969 | 911 (2.1%) |
| Statewide | 1,402,054 | 24,530 (1.8%) |

Source: U.S. Census Bureau, Population Estimates Program, 2020-2023
Estimates

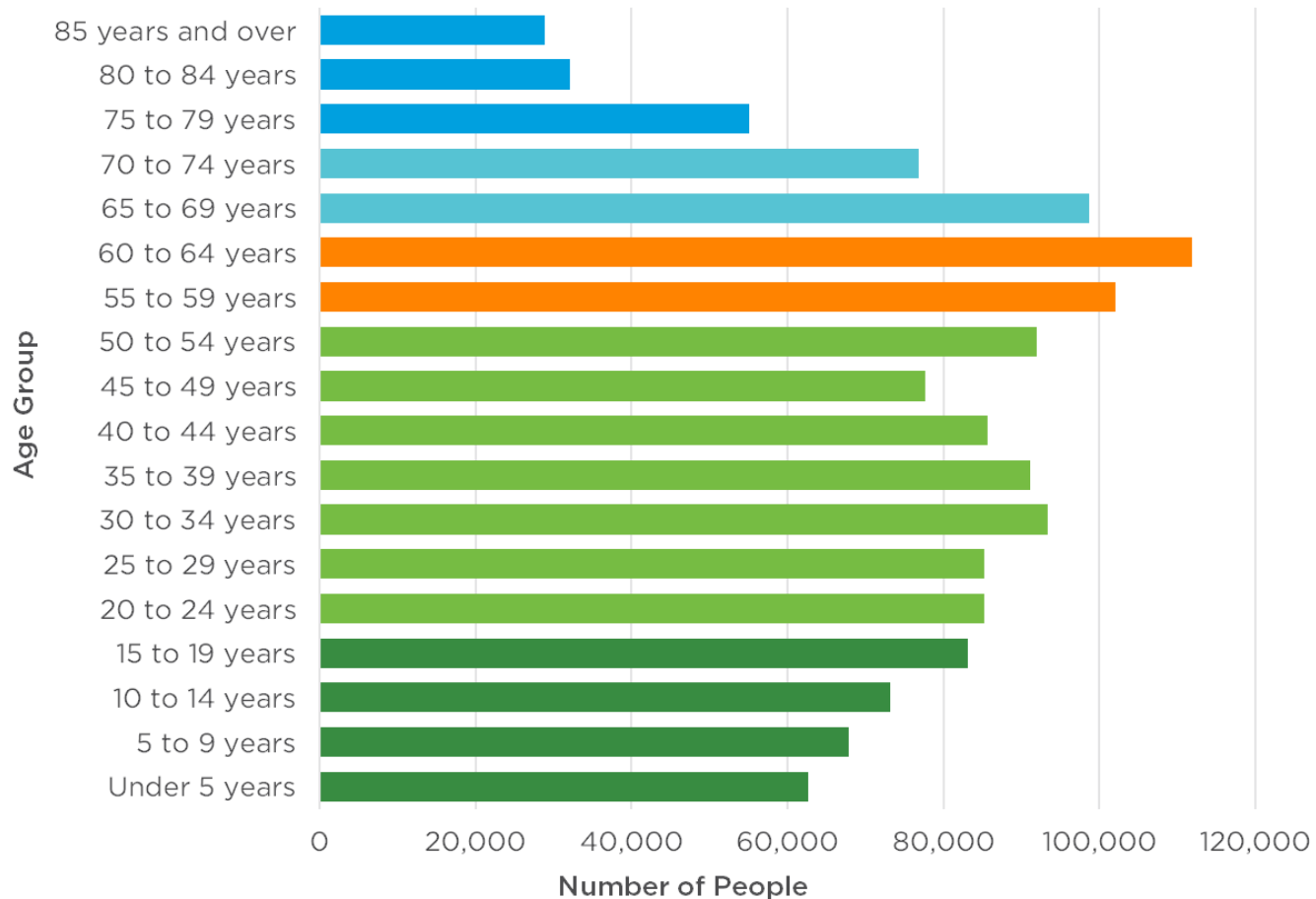
QUIZ QUESTION

**WHICH FIVE-YEAR AGE RANGES INCLUDE
THE LARGEST NUMBER OF GRANITE
STATERS?**

MANY GRANITE STATERS APPROACHING RETIREMENT AGE

NEW HAMPSHIRE POPULATION BY AGE GROUP

Number of People by Age Group as of July 1, 2023



Source: U.S. Census Bureau, Population Estimates Program, July 1, 2023 Estimates

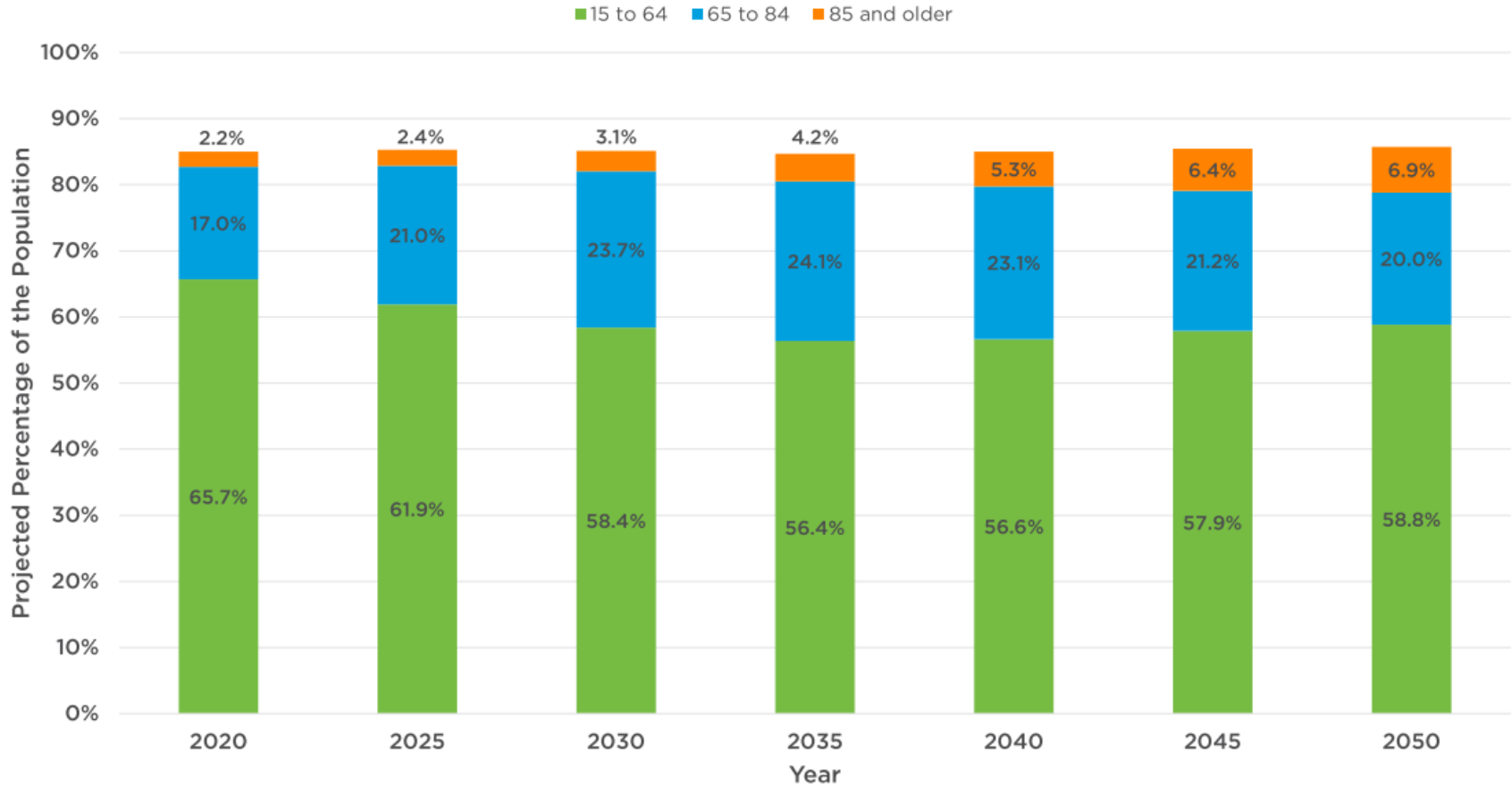
REFLECTION QUESTION

HOW DOES BEING ONE OF THE OLDEST STATES IN THE U.S. BY MEDIAN AGE INFLUENCE OUR STATE ECONOMY?

POPULATION PROJECTIONS 2020-2050

NEW HAMPSHIRE AGE PROJECTIONS

Projections by Age Group, for 2020 to 2050

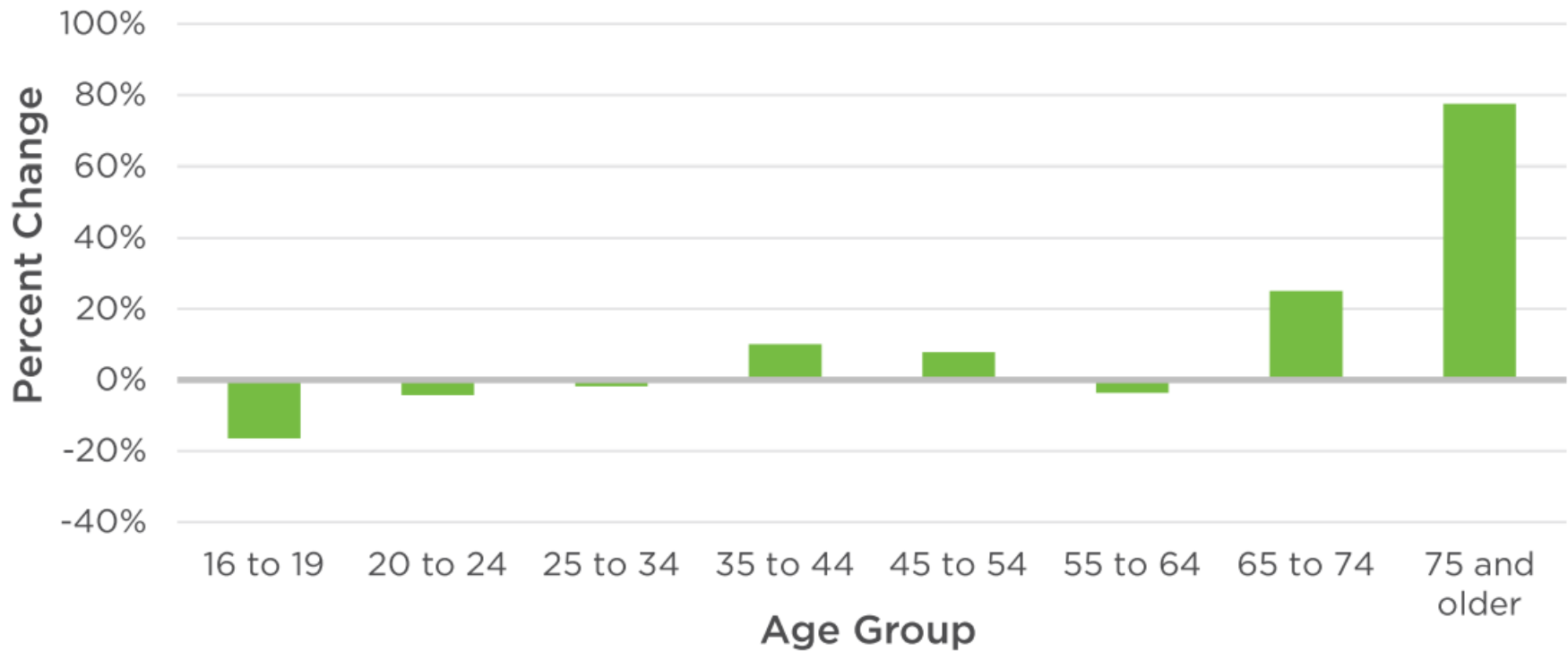


Source: NH Department of Business and Economic Affairs, State, County, and Municipal Population Projections, 2020-2050

WORKFORCE AGE PROJECTIONS 2022 TO 2032

NATIONAL WORKFORCE PROJECTIONS BY AGE GROUP

Percent Change from 2022 to 2032



Source: U.S. Bureau of Labor Statistics, Employment Projections, 2022-2032

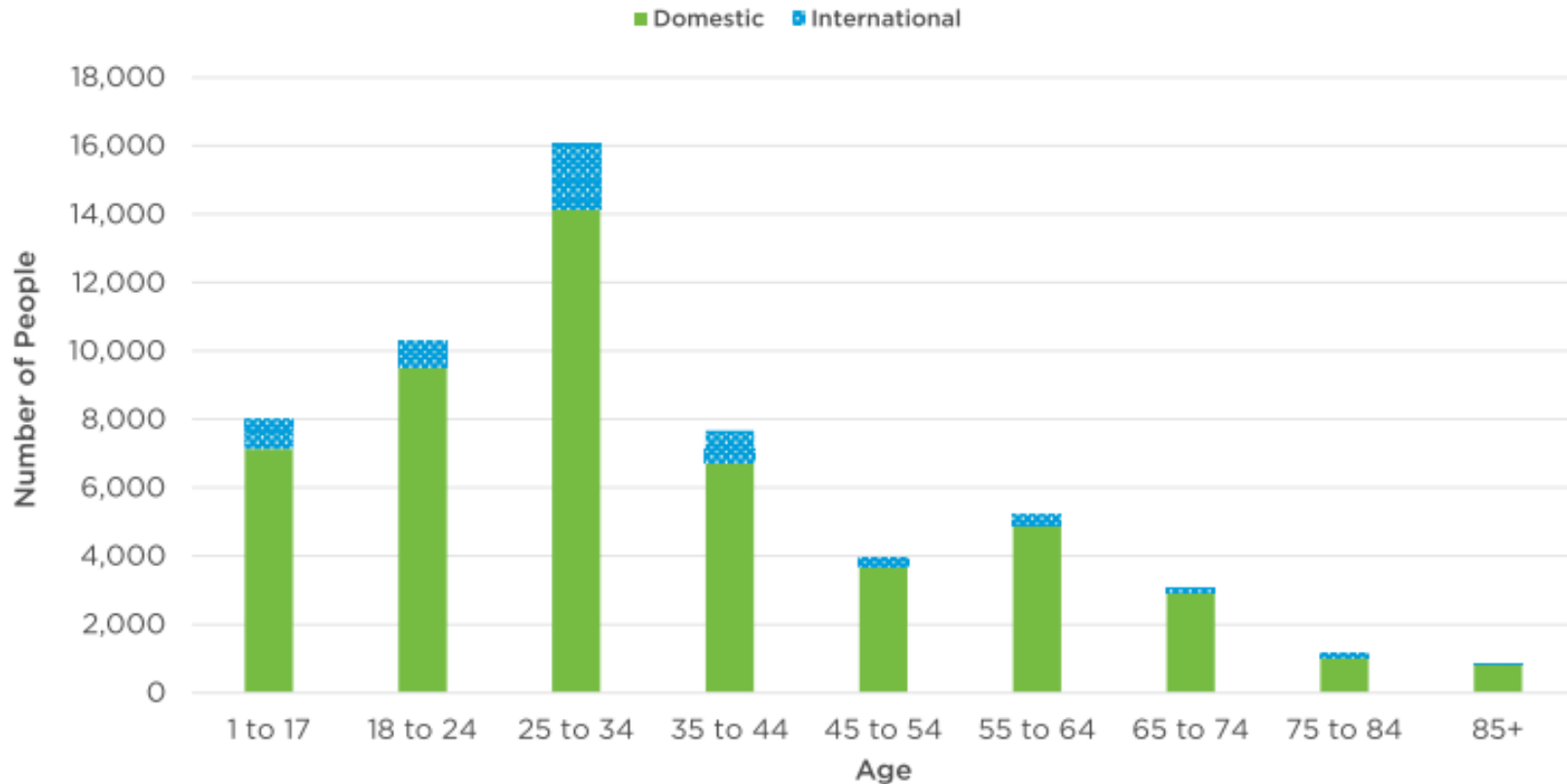
REFLECTION QUESTION

WHAT ARE THE IMPLICATIONS OF HAVING
A LARGER NUMBER OF OLDER
INDIVIDUALS IN THE WORKFORCE?

YOUNG PEOPLE ARE DRIVING NEW HAMPSHIRE'S POPULATION GROWTH

NEW HAMPSHIRE IN-MIGRATION BY AGE

Estimates of Domestic and International Migration by Age Group, from 2018 to 2022*



*Note: Those migrating from Puerto Rico and other U.S. territories are included in domestic in-migration.
Source: U.S. Census Bureau, American Community Survey, 2018-2022 5-year Estimates

DIVERSITY WITHIN NEW HAMPSHIRE'S POPULATION

NEW HAMPSHIRE POPULATION BY RACE AND ETHNICITY

From July 1, 2010 to July 1, 2023

| Racial or Ethnic Group | Number of People in July 2023 | Percentage of 2023 Population | Percentage Growth Since 2010 |
|-------------------------------------|-------------------------------|-------------------------------|------------------------------|
| Black or African American | 22,833 | 1.63% | 62.95% |
| Asian | 43,245 | 3.08% | 50.05% |
| American Indian or Alaska Native | 2,961 | 0.21% | 8.58% |
| Native Hawaiian or Pacific Islander | 419 | 0.03% | 26.20% |
| Hispanic or Latino* | 67,880 | 4.84% | 83.86% |
| White | 1,241,227 | 88.53% | 2.01% |
| Two or More Races | 23,489 | 1.68% | 37.07% |
| Total | 1,402,054 | 100.00% | 6.48% |

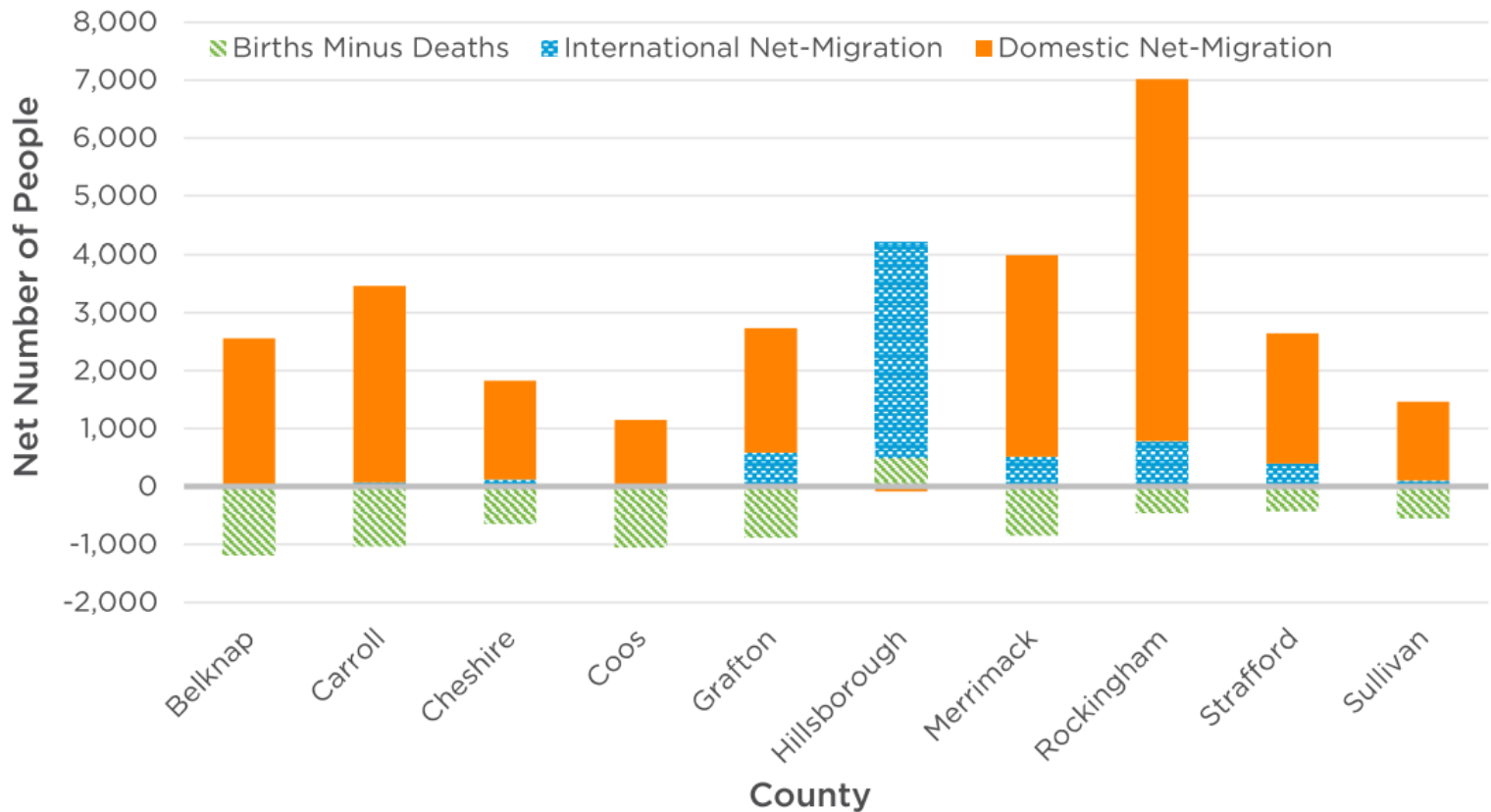
*Note: The U.S. Census Bureau counts "Hispanic or Latino" as an ethnicity, separate from race. This table shows anyone who identifies as Hispanic or Latino, regardless of race, as such and does not also count those individuals in a race category.

Source: U.S. Census Bureau, Population Estimates Program, 2010-2019 and 2020-2023 Estimates

DOMESTIC AND INTERNATIONAL IN-MIGRATION DRIVING POPULATION GROWTH

NEW HAMPSHIRE POPULATION CHANGE BY COUNTY

Births Minus Deaths, International, and Domestic Net-Migration, from April 1, 2020 to July 1, 2023

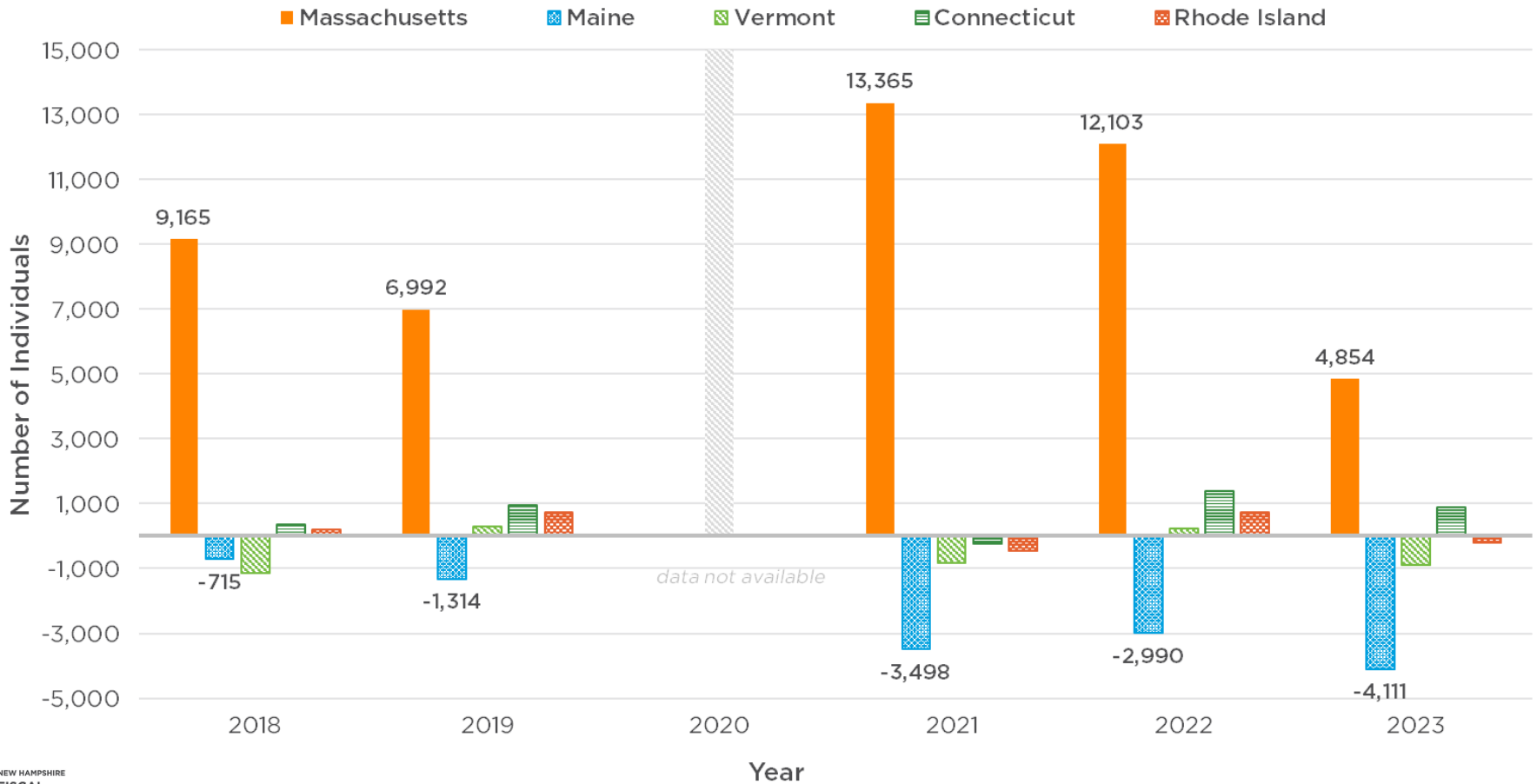


Source: U.S. Census Bureau, Population Estimates Program, 2020-2023 Estimates

MIGRATION TO AND FROM OTHER NEW ENGLAND STATES

NEW HAMPSHIRE NET MIGRATION FROM OTHER NEW ENGLAND STATES

Estimates of Annual Net Migration, from 2018 to 2023



Source: U.S. Census Bureau, American Community Survey, 2018-2023 1-year Estimates

QUIZ QUESTION

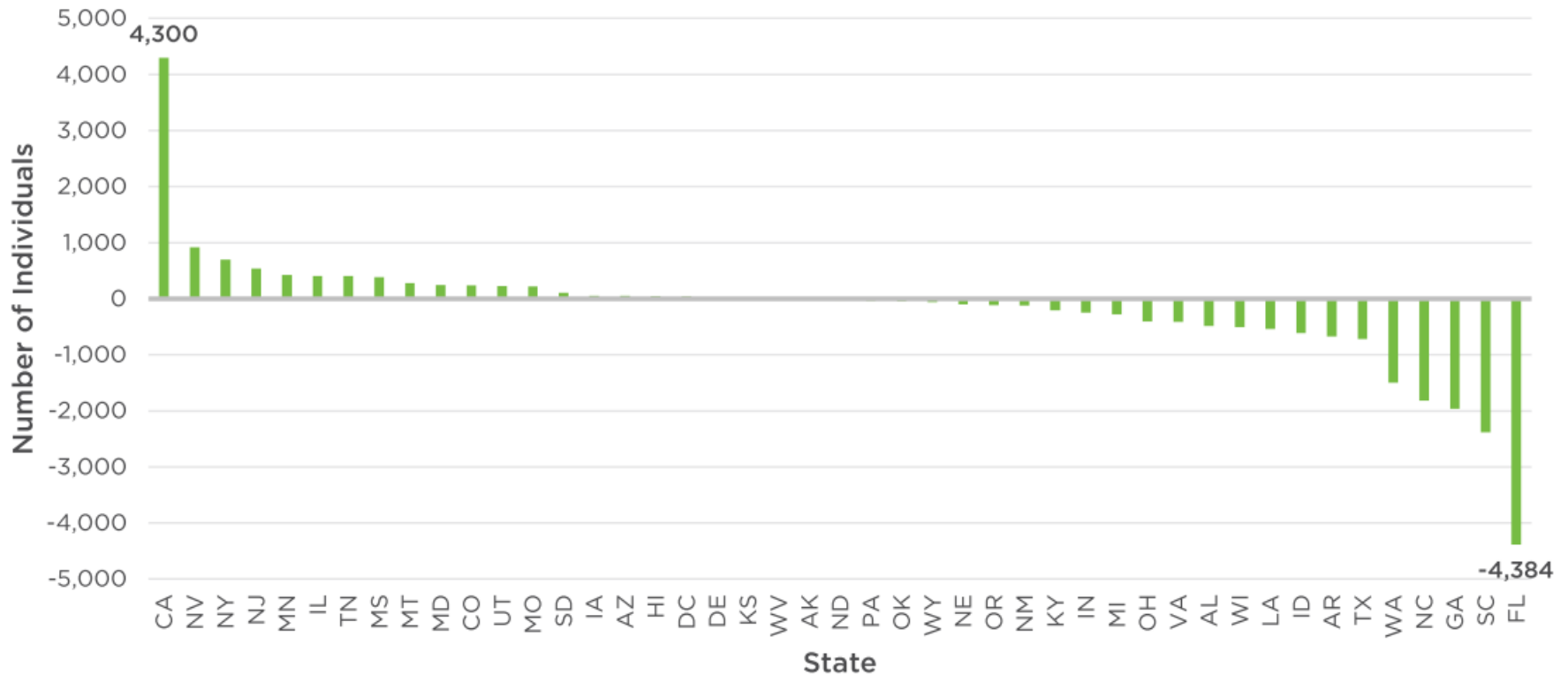
**BESIDES OTHER NEW ENGLAND STATES,
FROM WHERE ARE THE MOST DOMESTIC
MIGRANTS COMING?**

**OUTSIDE OF NEW ENGLAND, TO WHERE
DO GRANITE STATERS RELOCATE?**

MIGRATION TO AND FROM NEW HAMPSHIRE BEYOND NEW ENGLAND STATES

NEW HAMPSHIRE NET MIGRATION FROM OTHER STATES

Estimates of Net Migration in 2021 and 2022 Combined, Excluding New England States

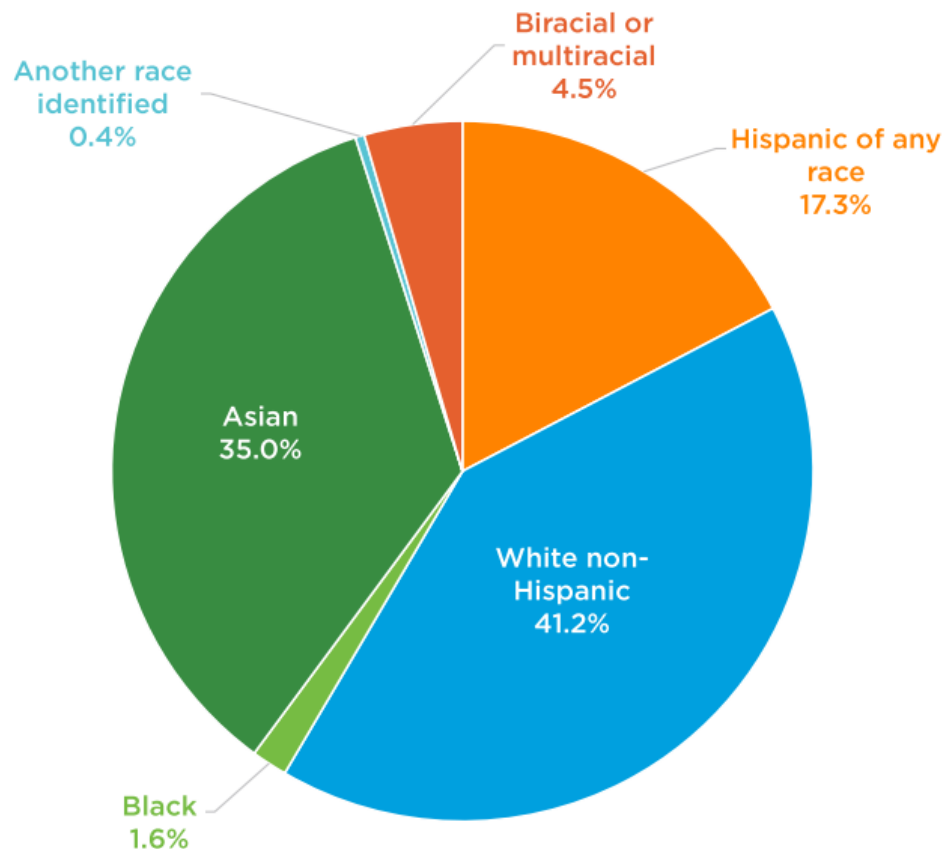


Source: U.S. Census Bureau, American Community Survey, 2021 and 2022 1-year Estimates

RACE AND ETHNICITY OF INTERNATIONAL MIGRANTS

NEW HAMPSHIRE INTERNATIONAL MIGRATION

Estimates of International Migration by Racial and Ethnic Group, from 2018 to 2022*



Most common origin countries for international migrants:

- India
- Dominican Republic
- United Kingdom
- Honduras
- Nepal
- China
- Brazil
- Germany

*Note: International migration excludes Puerto Rico and other U.S. territories.
Source: U.S. Census Bureau, American Community Survey, 2018-2022 5-year Estimates

REFLECTION

WHAT ARE THE IMPLICATIONS OF HAVING
A LARGER, OLDER, AND MORE DIVERSE
POPULATION IN NH?

REFLECTION

**WHAT ARE BARRIERS NEW HAMPSHIRE
FACES WHEN TRYING TO ATTRACT
PEOPLE TO COME HERE TO LIVE AND
WORK?**

HOUSING FAST FACTS

1. WHAT WAS THE MEDIAN PRICE FOR A SINGLE-FAMILY HOUSE IN NH LAST MONTH?
2. WHAT WAS THE MEDIAN COST TO RENT A TWO-BEDROOM APARTMENT IN NH IN 2024?
3. WHAT PERCENTAGE OF NH RENTERS ARE COST-BURDENED BY HOUSING COSTS (RENT + UTILITIES)?

DECEMBER 2025: STATEWIDE \$507,000, ROCKINGHAM \$640,000

NEW HAMPSHIRE MEDIAN SINGLE-FAMILY HOUSE SALE PRICES



Note: Axis does not start at \$0.

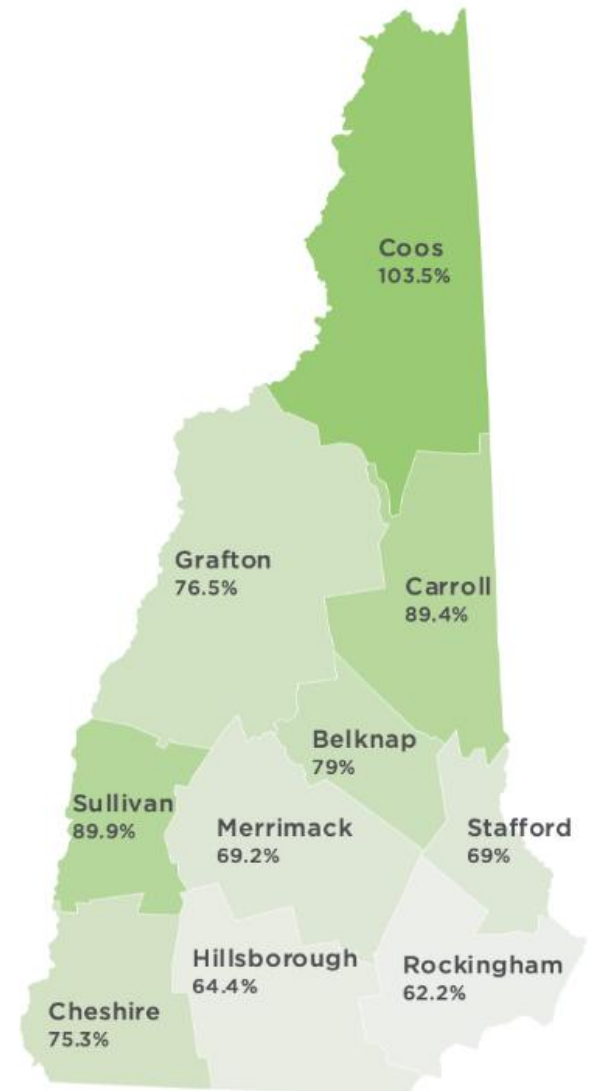
PERCENT CHANGE IN MEDIAN SINGLE-FAMILY HOME PRICE

Change in Median Price



| County | Price In 2018 | Price In 2023 |
|------------------|------------------|------------------|
| Belknap | \$250,000 | \$447,500 |
| Carroll | \$245,500 | \$465,000 |
| Cheshire | \$194,250 | \$340,500 |
| Coos | \$113,000 | \$230,000 |
| Grafton | \$226,600 | \$400,000 |
| Hillsborough | \$298,000 | \$490,000 |
| Merrimack | \$260,000 | \$440,000 |
| Rockingham | \$370,000 | \$600,000 |
| Strafford | \$268,000 | \$453,000 |
| Sullivan | \$180,000 | \$341,900 |
| Statewide | \$283,000 | \$470,000 |

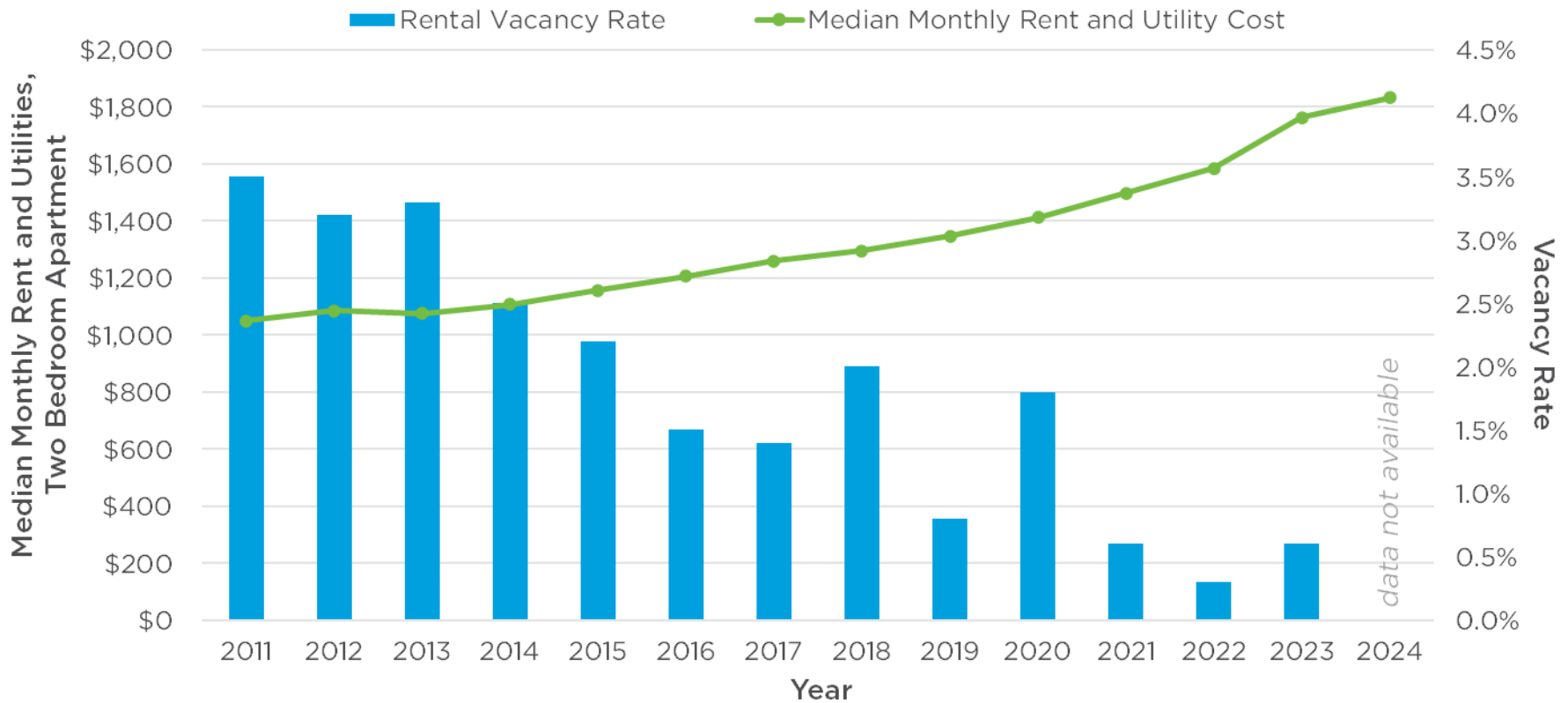
Source: New Hampshire Association of Realtors



MEDIAN COST OF A TWO-BEDROOM UNIT IN NH IN 2024: \$1,833, ROCKINGHAM: \$2,069

MEDIAN MONTHLY RENTAL COSTS AND VACANCY RATES

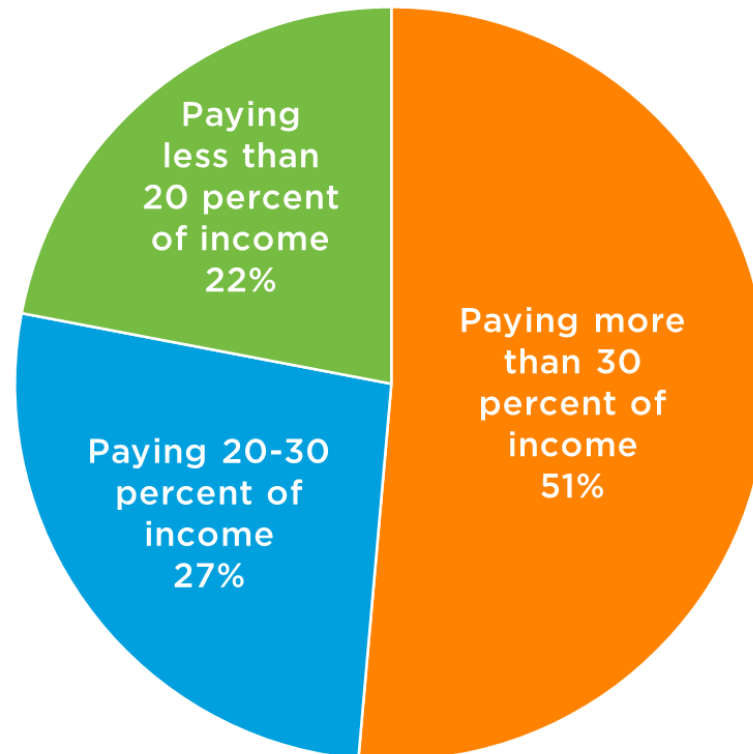
New Hampshire Statewide Data, Two Bedroom Apartments



Source: New Hampshire Housing Finance Authority, Rental Cost Survey Report

PERCENTAGE OF RENTERS WHO ARE HOUSING COST BURDENED: 51%

RENT AS A PERCENTAGE OF HOUSEHOLD INCOME IN NEW HAMPSHIRE



Note: Estimates For All New Hampshire Renter Households, Gross Rent Including Utilities
Source: U.S. Census Bureau, American Community Survey, 2023 One-Year Estimates

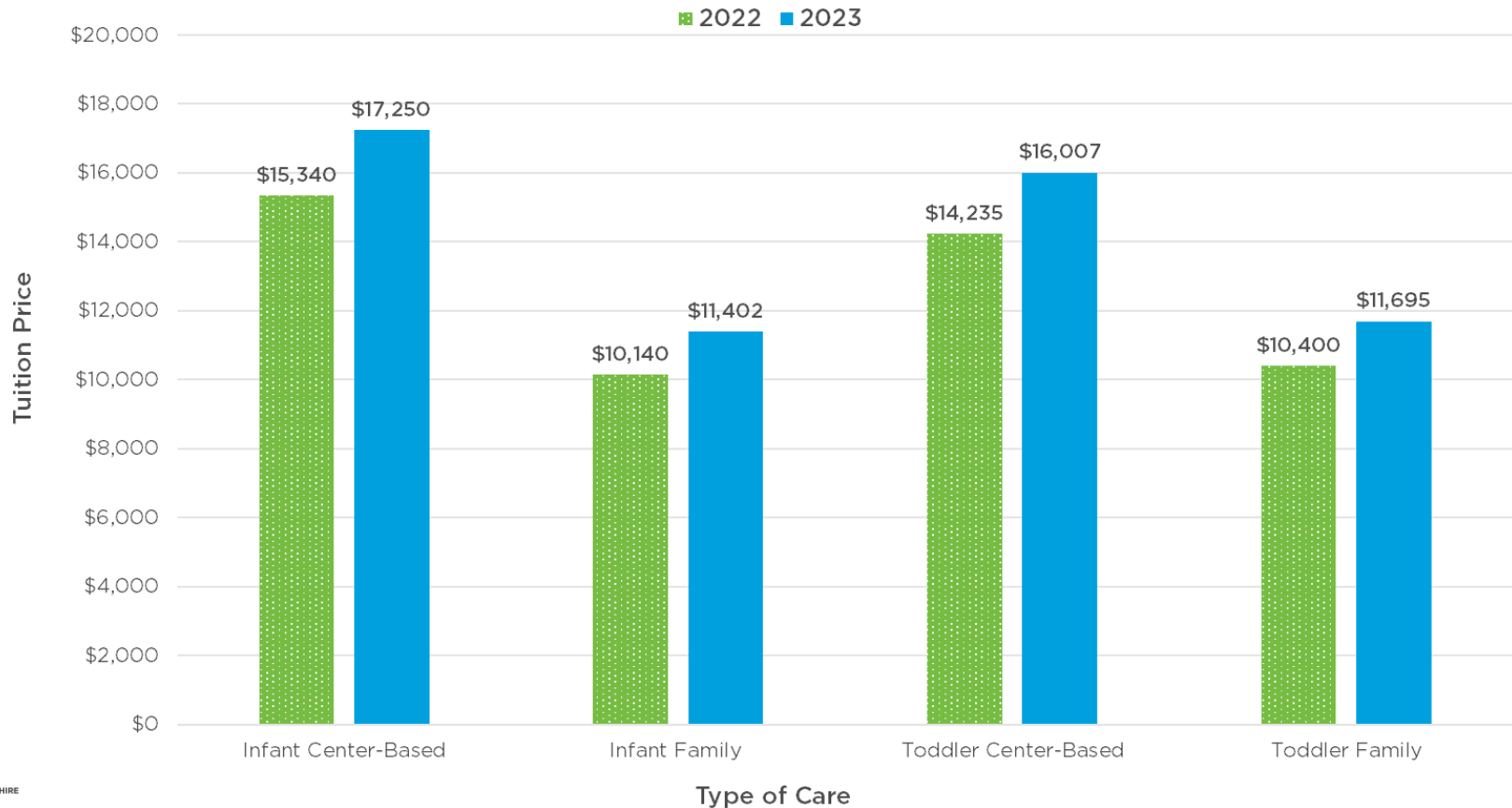
CHILD CARE FAST FACTS

1. WHAT WAS THE AVERAGE PRICE OF CHILD CARE FOR TWO CHILDREN UNDER FIVE YEARS OLD IN CENTER-BASED CARE DURING 2023?
2. WHAT WAS THE MEDIAN WAGE FOR A CHILD CARE WORKER IN 2023?

PRICE FOR TWO CHILDREN UNDER 5 IN CENTER-BASED CARE IN 2023: NEARLY \$32,000

NEW HAMPSHIRE CHILD CARE PRICES IN 2022 AND 2023

Child Care Tuition Prices for Center-Based and Family Child Care for Infants and Toddlers



NEW HAMPSHIRE CHILD CARE SCHOLARSHIP ELIGIBILITY EXPANSION

2024 CHILD CARE SCHOLARSHIP INCOME ELIGIBILITY

Annual Household Income Caps for 2024 Child Care Scholarship, No Cost Share, and \$5 Per Week Cost Share Eligibility

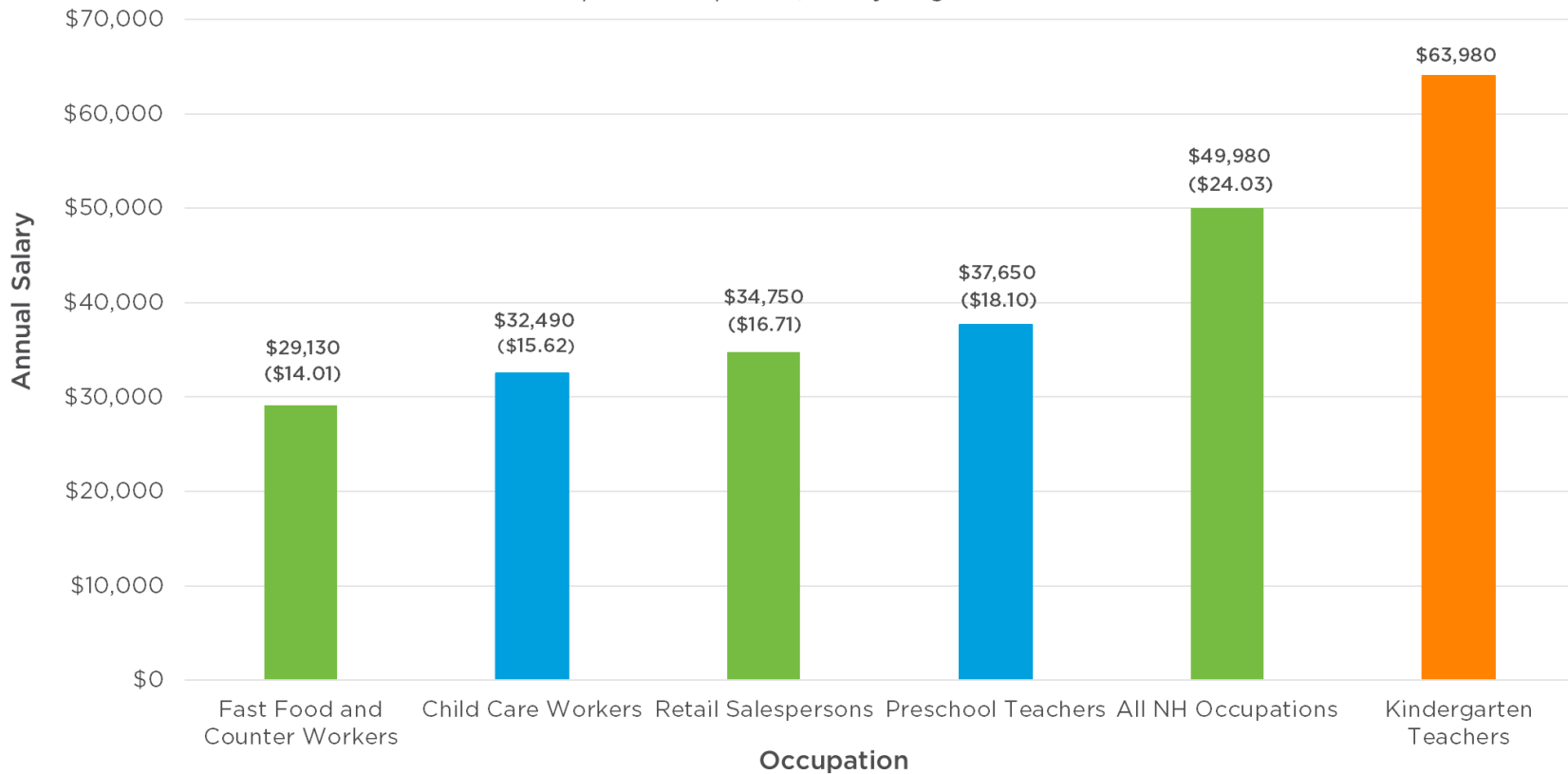
| Family Size | Scholarship Less than 85% of State Median Income | No Cost Share Less than or equal to 100% of Federal Poverty Guidelines | \$5 Cost Share Between 100% to 138% of Federal Poverty Guidelines |
|-------------|--|---|--|
| 1 | \$58,985 | \$15,060 | \$20,783 |
| 2 | \$77,134 | \$20,440 | \$28,208 |
| 3 | \$95,283 | \$25,820 | \$35,632 |
| 4 | \$113,432 | \$31,200 | \$43,056 |
| 5 | \$131,581 | \$36,580 | \$50,481 |
| 6 | \$149,731 | \$41,960 | \$57,905 |
| 7 | \$153,133 | \$47,340 | \$65,330 |
| 8 | \$156,536 | \$52,720 | \$72,754 |

Sources: New Hampshire Department of Health and Human Services Bureau of Child Development and Head Start Collaboration Child Care Scholarship Income Eligibility Levels (Updated July 1, 2024), U.S. Department of Health and Human Services 2024 Poverty Guidelines for 48 Contiguous States (Updated January 2024)

NEW HAMPSHIRE EARLY CHILDHOOD EDUCATORS' WAGES ARE NOT COMPETITIVE

2023 MEDIAN ANNUAL SALARIES FOR SELECT NEW HAMPSHIRE OCCUPATIONS

U.S. Bureau of Labor Statistics May 2023 State Occupational Employment and Wage Estimates for Selected New Hampshire Occupations; Hourly Wages in Parentheses



Note: Kindergarten teacher income is only reported as an annual salary.

Source: U.S. Bureau of Labor Statistics' May 2023 State Occupational Employment and Wage Estimates for New Hampshire

TRUE COST OF HIGH-QUALITY CHILD CARE

- Revenue from tuition and NH Child Care Scholarships may not generate enough funds to cover necessary program costs
- Costs may include:
 - Payroll and benefits
 - Professional development for staff
 - Food and diapers
 - Toys, furniture, and playground equipment
 - Curricula and assessments
 - Reducing child to teacher ratios, as needed
 - Cleaning supplies
 - Rent or Mortgage
 - Insurance
 - Utilities
 - Additional office and business expenses
- Difficult to streamline or consolidate child care costs due to unique business model

ADDITIONAL RESOURCES

- Issue Brief: New Hampshire's Growing Population and Changing Demographics Before and Since the COVID-19 Pandemic – August 16, 2024
<https://nhfpi.org/resource/new-hampshires-growing-population-and-changing-demographics-before-and-since-the-covid-19-pandemic/>
- Blog: Annual Price of 2023 Child Care for Two Granite State Children Under Five Averaged Nearly \$32,000 – May 15, 2024
<https://nhfpi.org/blog/annual-price-of-2023-child-care-for-two-granite-state-children-under-five-averaged-nearly-32000/>
- Blog: New Hampshire Renters Were Cost-Burdened by Housing at Higher Rates than Homeowners in 2023 – September 23, 2024
<https://nhfpi.org/blog/new-hampshire-renters-were-cost-burdened-by-housing-at-higher-rates-than-homeowners-in-2023/>
- Resource Pages: Economy, Education
<https://nhfpi.org/topic/economy/>
<https://nhfpi.org/topic/education/>



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