



TRANSPORTATION AND THE NEW HAMPSHIRE WORKFORCE

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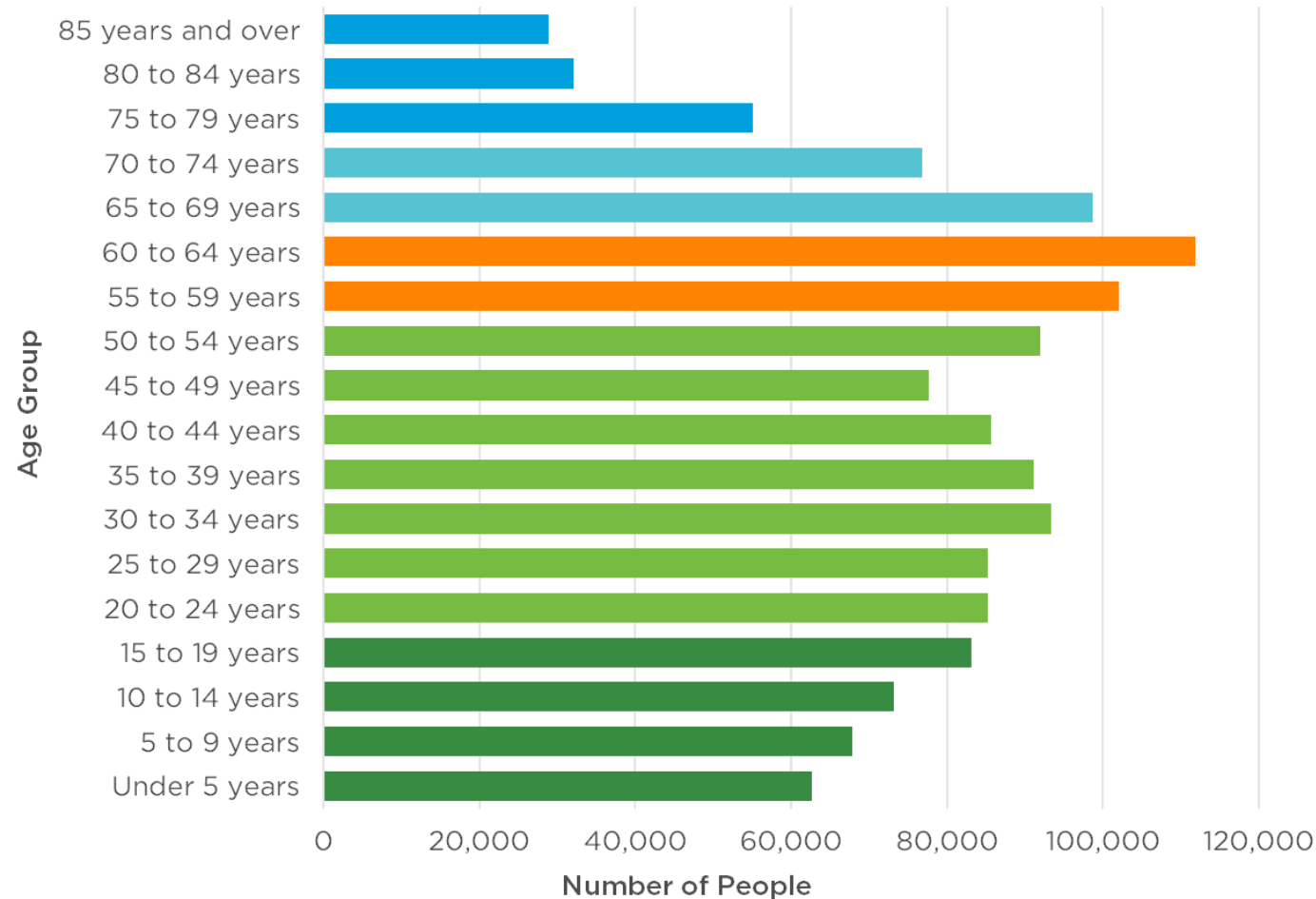
NHTA & SCC ANNUAL CONFERENCE
COMMUNITY TRANSPORTATION: DRIVING OUR NH ECONOMY

JUNE 13, 2025

MORE THAN 200,000 GRANITE STATERS APPROACHING TRADITIONAL RETIREMENT AGES

NEW HAMPSHIRE POPULATION BY AGE GROUP

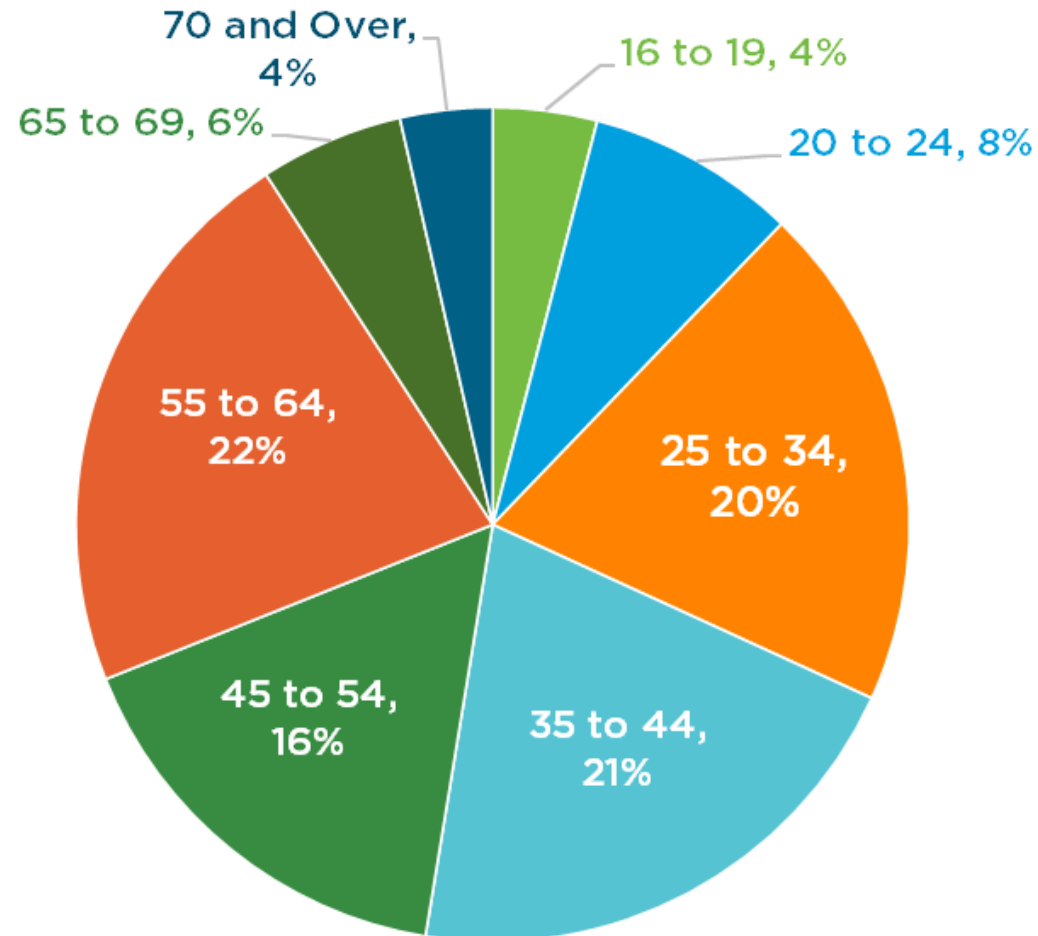
Number of People by Age Group as of July 1, 2023



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

31 PERCENT OF LABOR FORCE IS OVER AGE 54

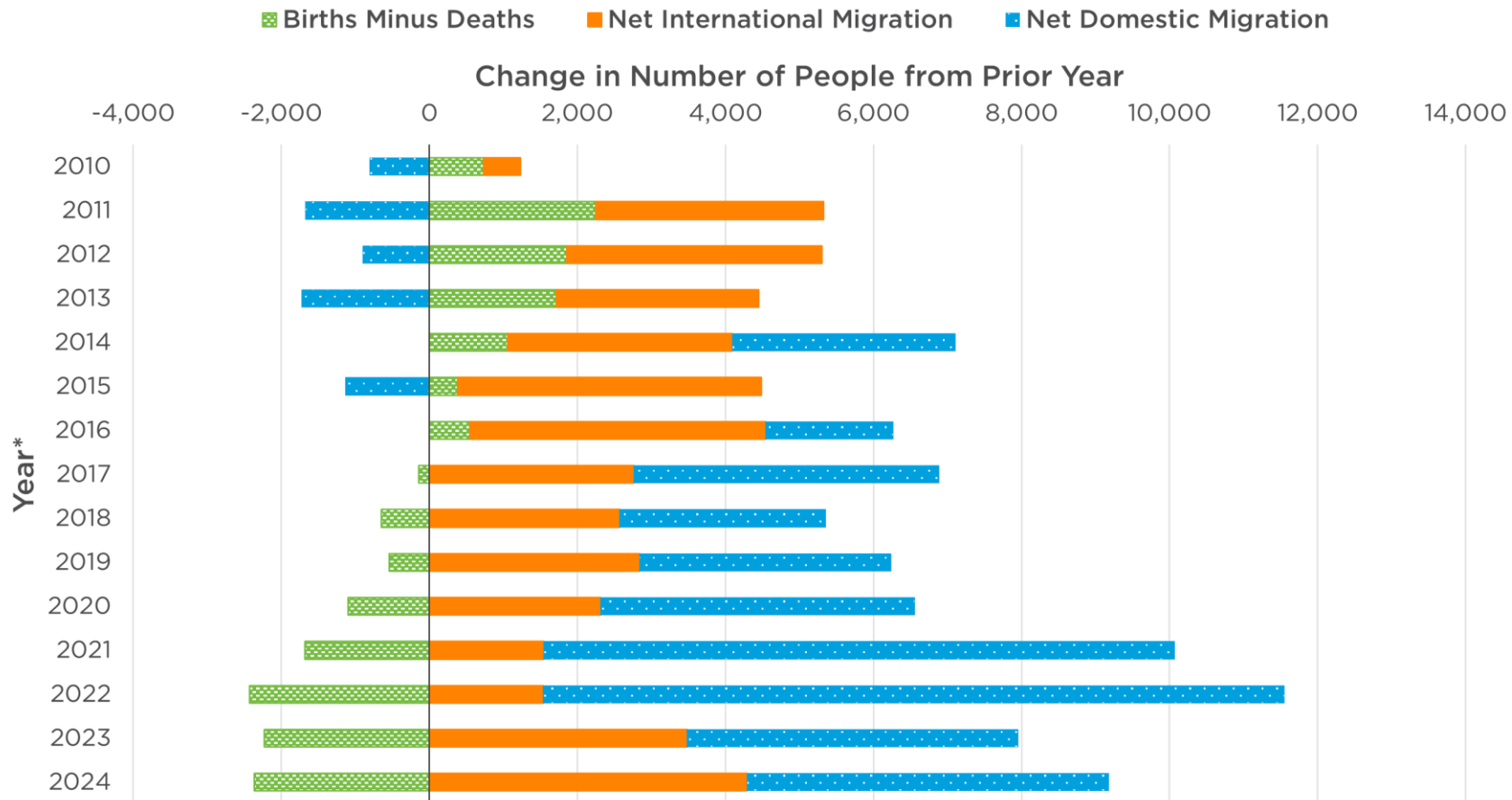
NEW HAMPSHIRE'S LABOR FORCE BY AGE IN YEARS, 2024



Source: New Hampshire Employment Security

STATE POPULATION WOULD BE DECLINING WITHOUT MIGRATION

NEW HAMPSHIRE POPULATION CHANGES BY BIRTHS, DEATHS, MIGRANTS FROM OTHER STATES, AND INTERNATIONAL MIGRANTS



Notes: *Year refers to the period lasting twelve months and ending on July 1 of the calendar year identified. Based on vintage 2020 estimates and vintage 2024 estimates, subject to future updates.

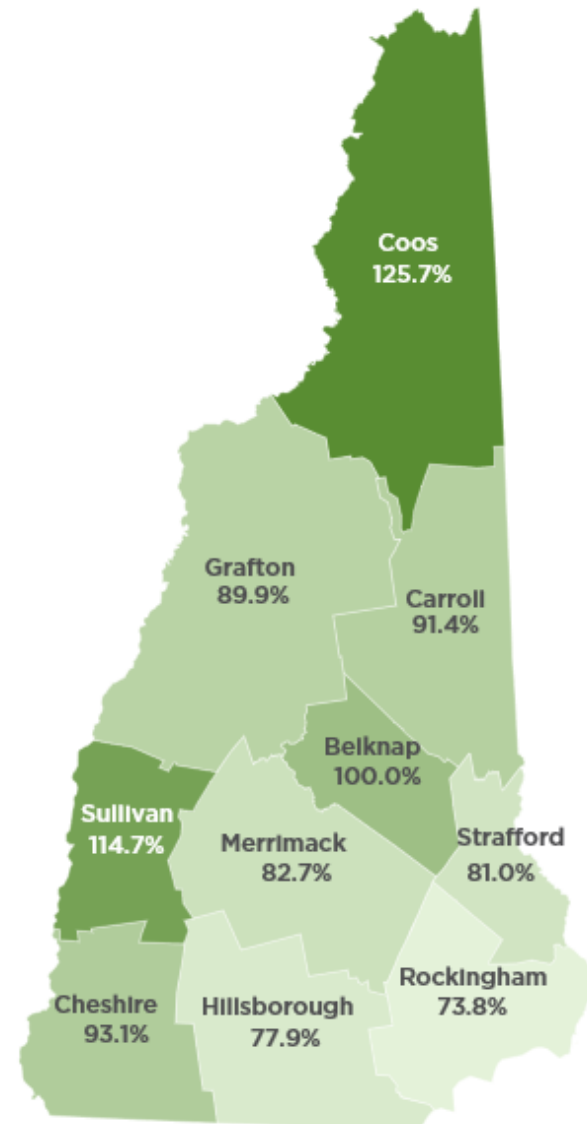
Source: U.S. Census Bureau, Population Estimates Program, Vintage 2020 and 2024 Tables

PRICES FOR HOUSES AND RENTAL UNITS HAVE RISEN STATEWIDE, FASTER IN RURAL AREAS

CHANGE IN MEDIAN SINGLE FAMILY HOUSE
SALE PRICE

County	Price in 2018	Price in 2024
Belknap	\$250,000	\$500,000
Carroll	\$245,500	\$470,000
Cheshire	\$194,250	\$375,000
Coos	\$113,000	\$255,000
Grafton	\$226,600	\$430,251
Hillsborough	\$298,000	\$530,000
Merrimack	\$260,000	\$475,000
Rockingham	\$370,000	\$643,000
Strafford	\$268,000	\$485,000
Sullivan	\$180,000	\$386,500
Statewide	\$283,000	\$514,000

Source: New Hampshire Association of Realtors



2018-2024 Median Cost Increases:

- Rent and Utilities for Two-Bedroom Unit: 41%
- Single-Family Houses Sale Price: 82%

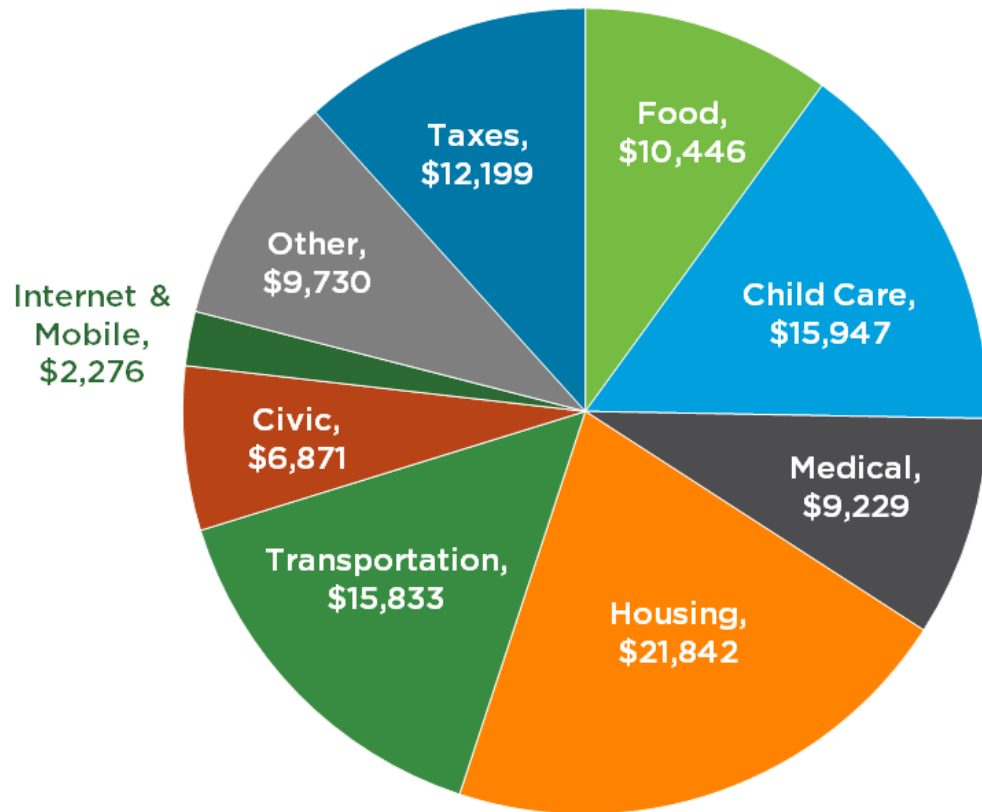
Renters More Likely to Have Lower Incomes

- 2023 median income among all households: \$97,000
- Homeowner households: \$115,000
- Renter households: \$54,000

Sources: New Hampshire Housing; U.S. Census Bureau, American Community Survey, Table S2503

HOUSING, CHILD CARE, AND TRANSPORTATION SIGNIFICANT COSTS IN FAMILY BUDGETS

MASSACHUSETTS INSTITUTE OF TECHNOLOGY
LIVING WAGE CALCULATOR
TWO WORKING ADULTS, ONE CHILD: \$104,373
New Hampshire, 2025



Transportation Methodology:

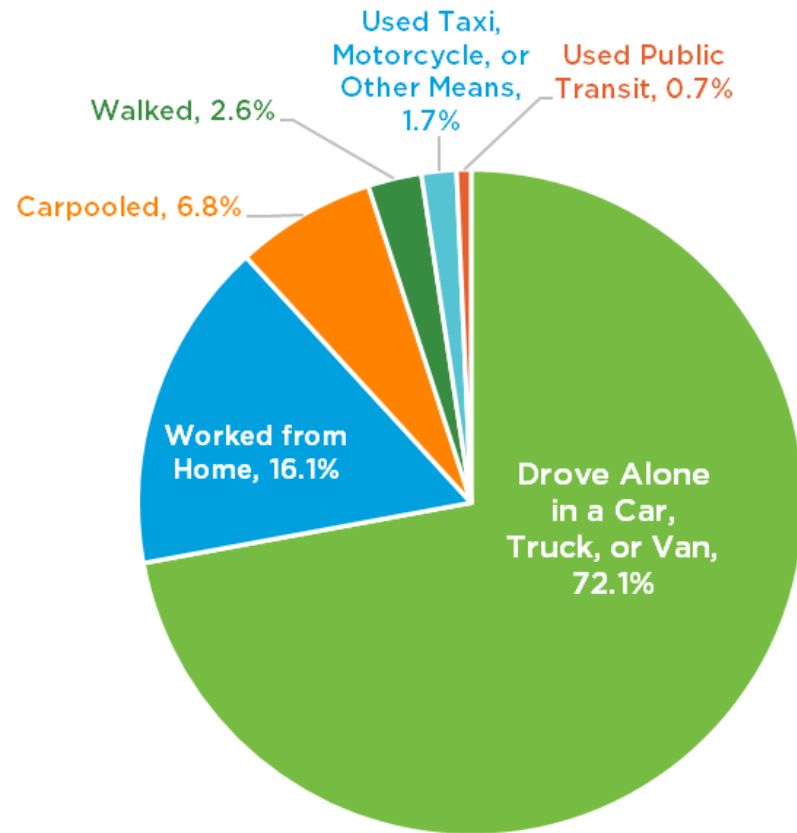
- Based on H+T index from Center for Neighborhood Technology, initially a project of the Brookings Institution
- Index models transportation cost by county based on neighborhood employment and household characteristics, automobile ownership and use, as well as public transit use
- Adjusted to households with 80 percent of area median income by MIT
- Weighted for expenditures based on household size from U.S. Bureau of Labor Statistics consumer expenditure survey data

Source: Massachusetts Institute of Technology, Living Wage Calculator, Updated February 2025

Sources: Massachusetts Institute of Technology, Center for Neighborhood Technology

AUTOMOBILES KEY TO MOST COMMUTES

NEW HAMPSHIRE RESIDENT TRANSPORTATION TO WORK, 2023



Note: Data include workers age 16 years and older.
Source: U.S. Census Bureau, American Community Survey
One-Year Estimates, 2023

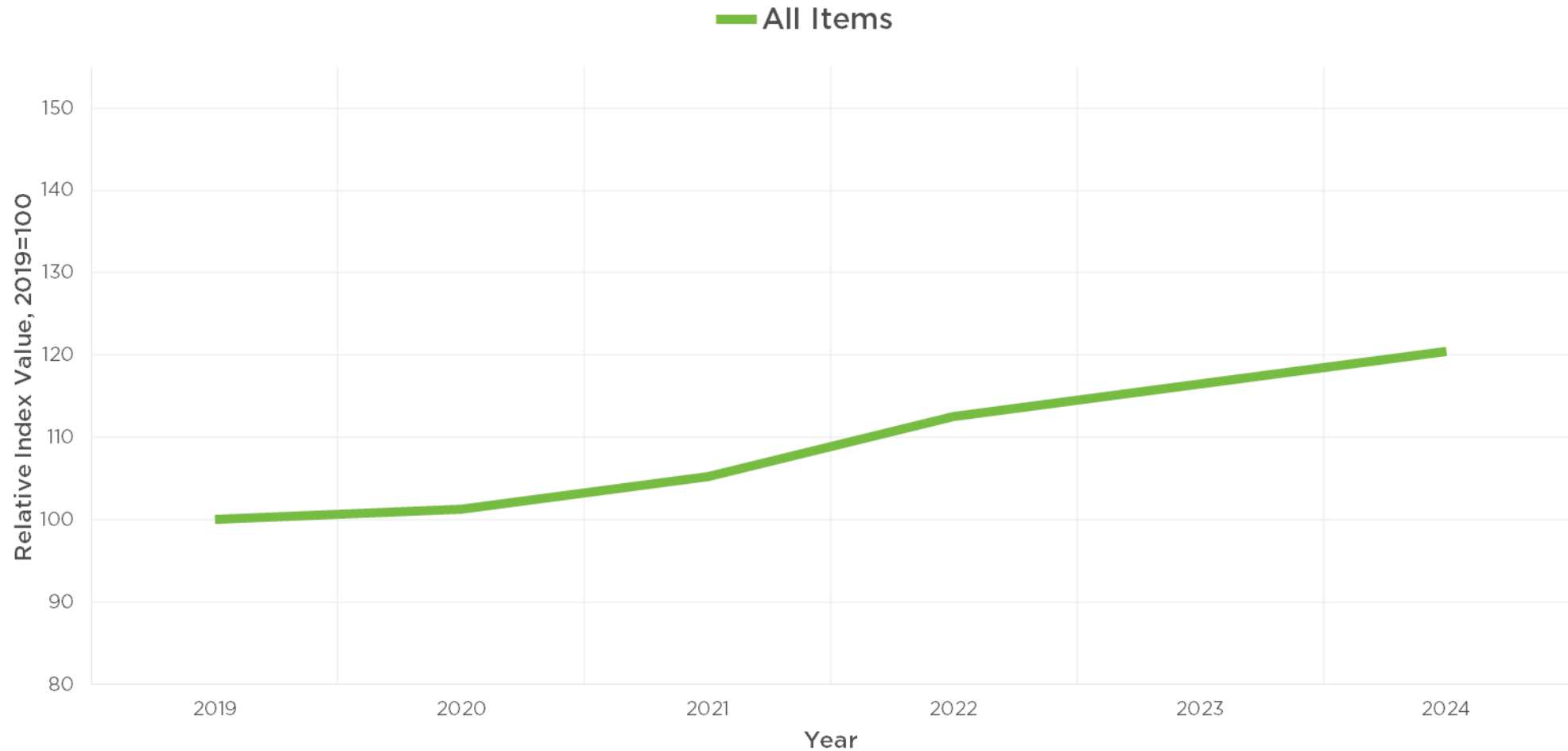
- Average travel time to work for commuters driving alone was 27.6 minutes in 2023, and 27.2 minutes for carpooling commuters, but 61.9 minutes for public transit riders
- Higher share of commuters riding public transit worked outside of state (48 percent) than commuters overall (13 percent)
- Renters, workers in or near poverty, Granite State commuters identifying as a race or ethnicity other than white and non-Hispanic, and younger workers are more likely to ride public transit than the population overall

Sources: U.S. Census Bureau, American Community Survey, 2023 One-Year Estimates with Five-Year 2019-2023 Estimates used for validity testing.

INFLATION VARIATIONS SINCE 2019

INFLATION BY CONSUMER GOOD OR SERVICE, 2019-2024

*Northeastern United States**

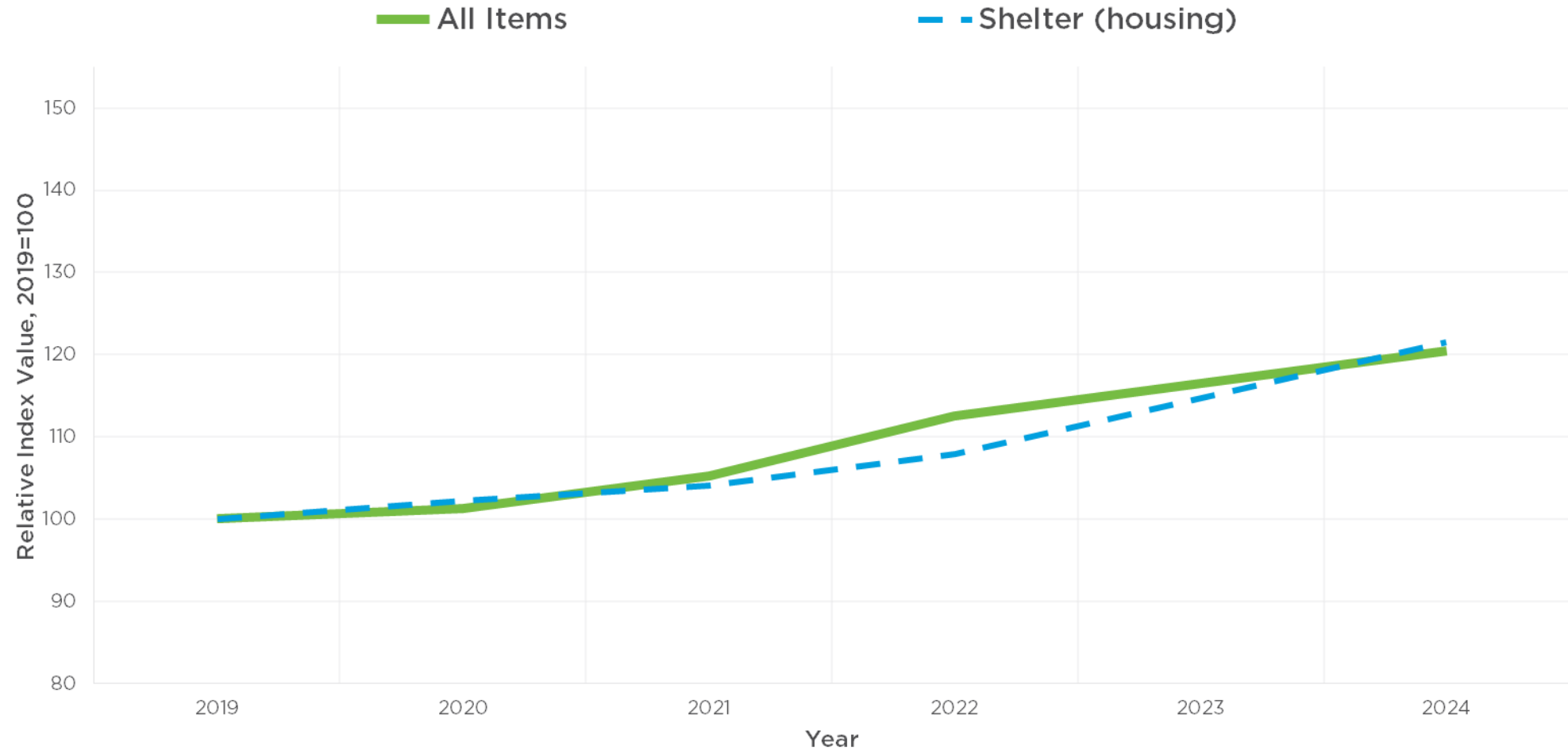


*Includes the six New England states, New York, New Jersey, and Pennsylvania.
Source: U.S. Bureau of Labor Statistics, Consumer Price Index-Urban, Northeast

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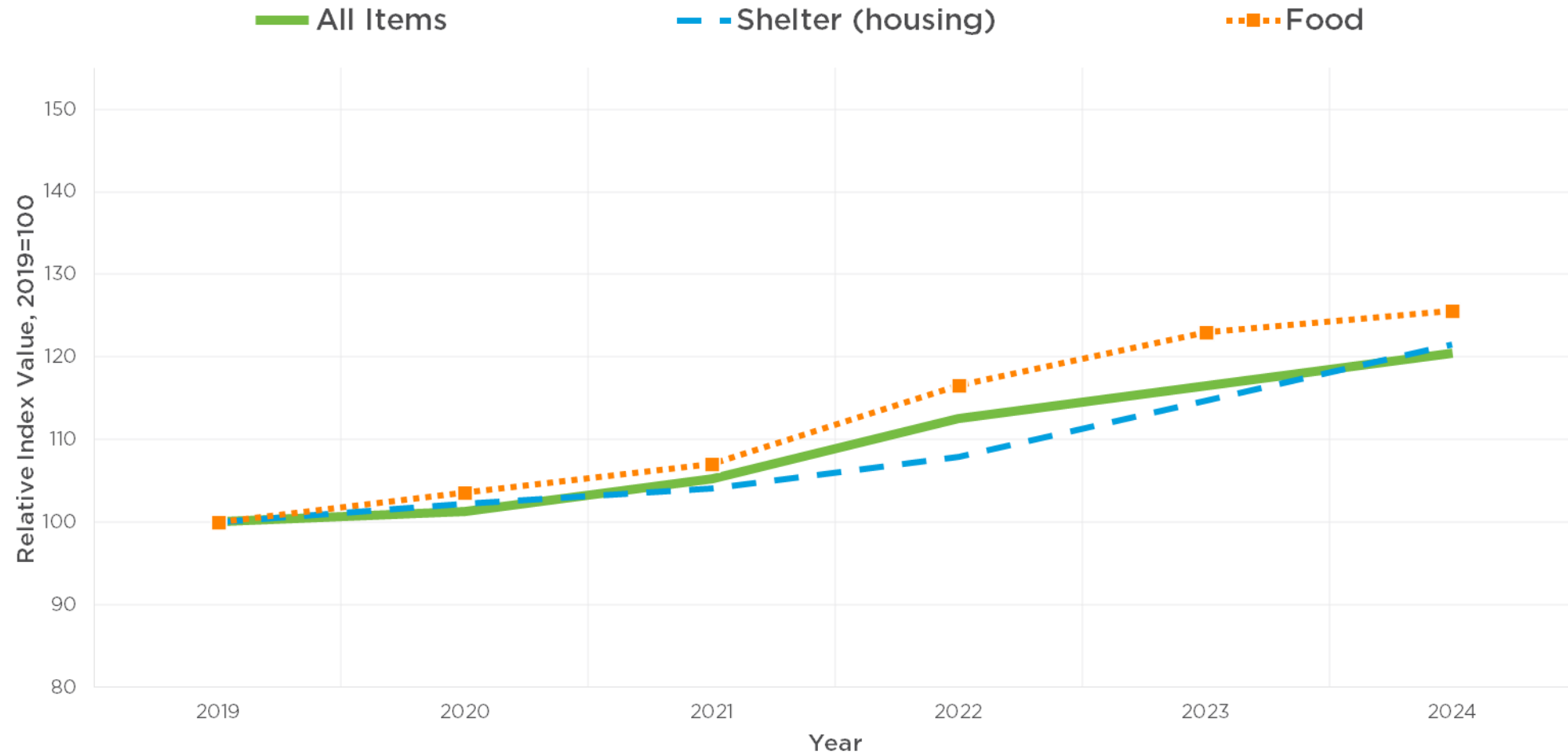


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INFLATION BY CONSUMER GOOD OR SERVICE, 2019-2024

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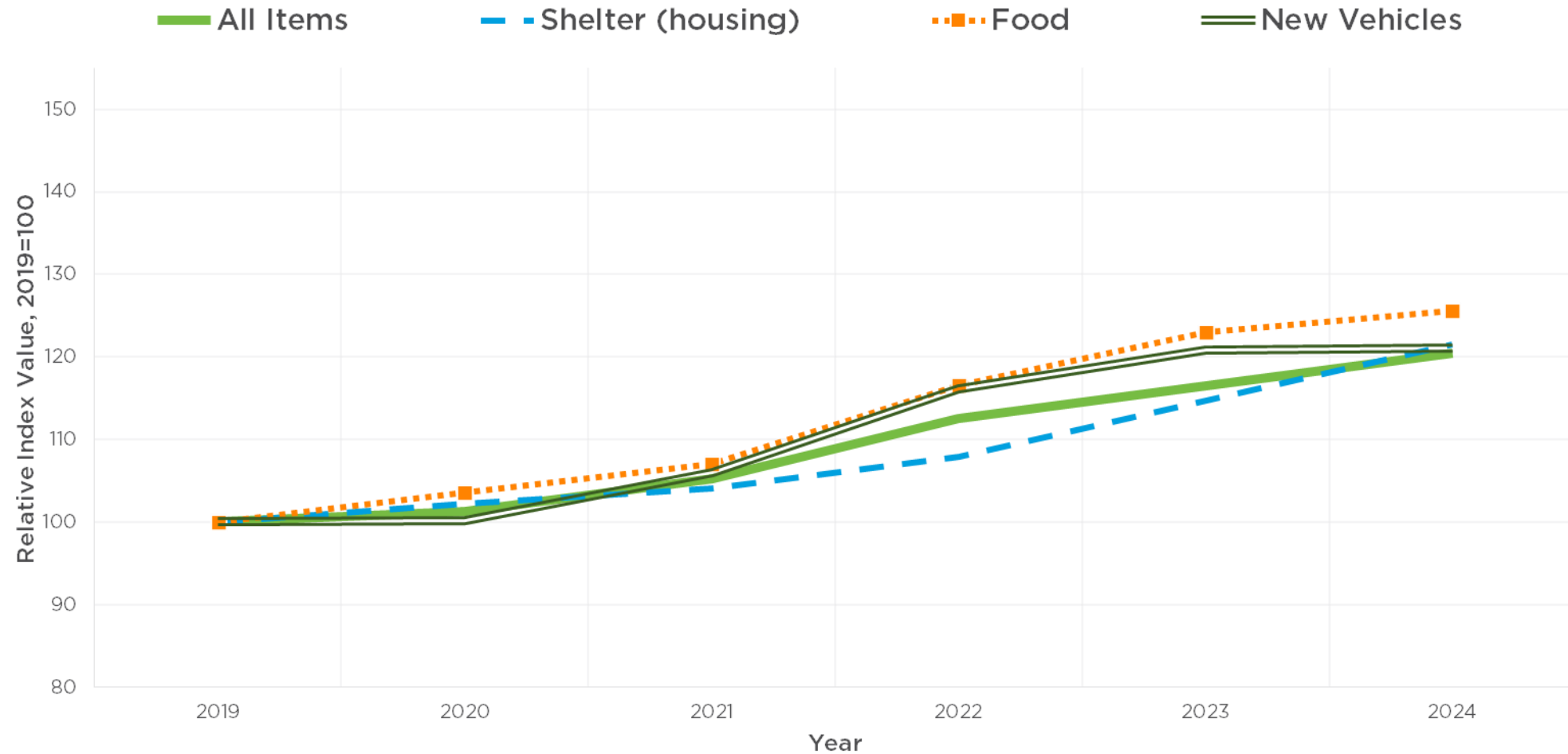


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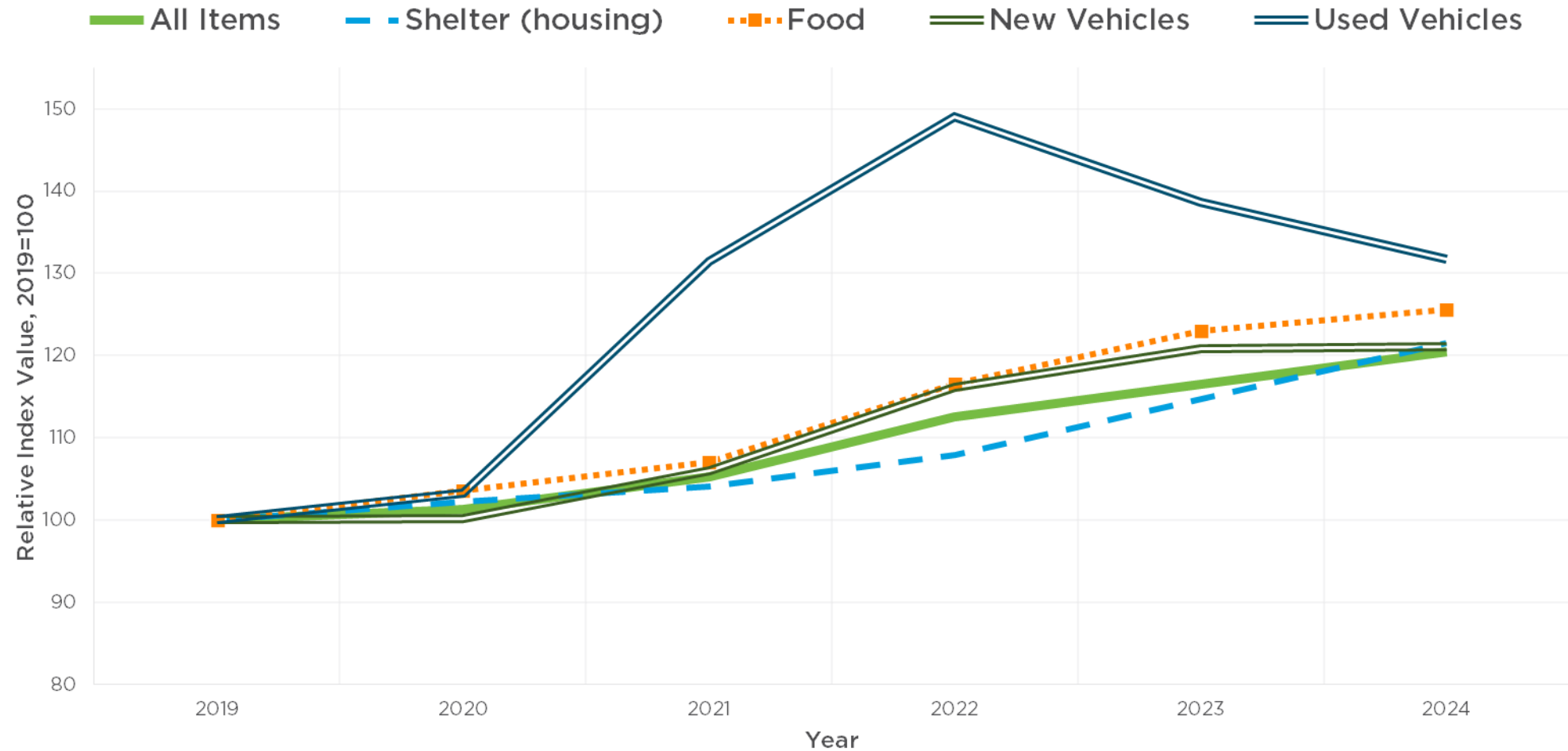


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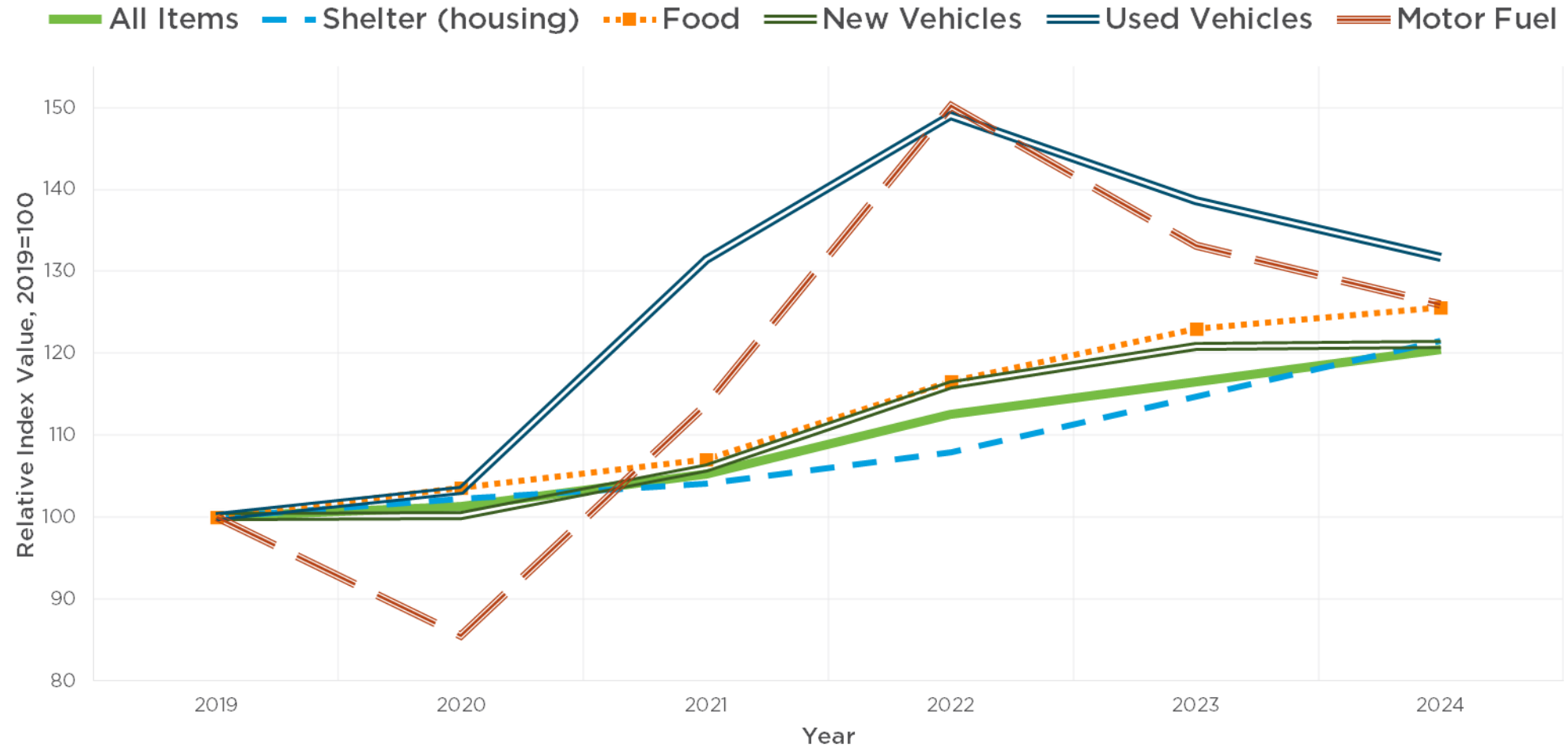


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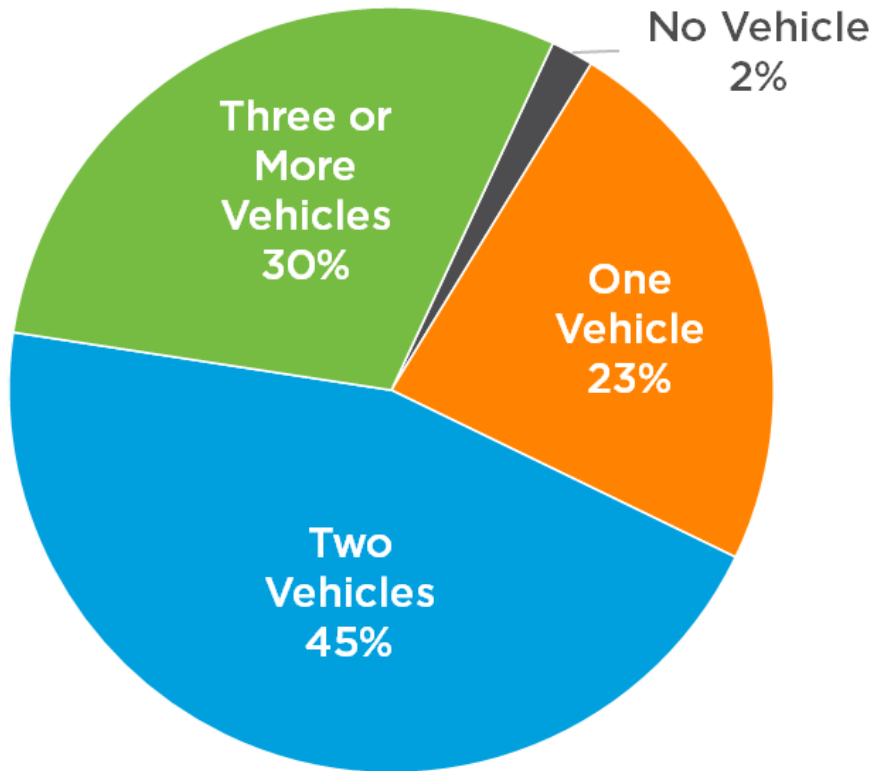


*Includes the six New England states, New York, New Jersey, and Pennsylvania.
Source: U.S. Bureau of Labor Statistics, Consumer Price Index-Urban, Northeast

ACCESS TO VEHICLES VARYS BY HOMEOWNERS, RENTERS, AND INCOME

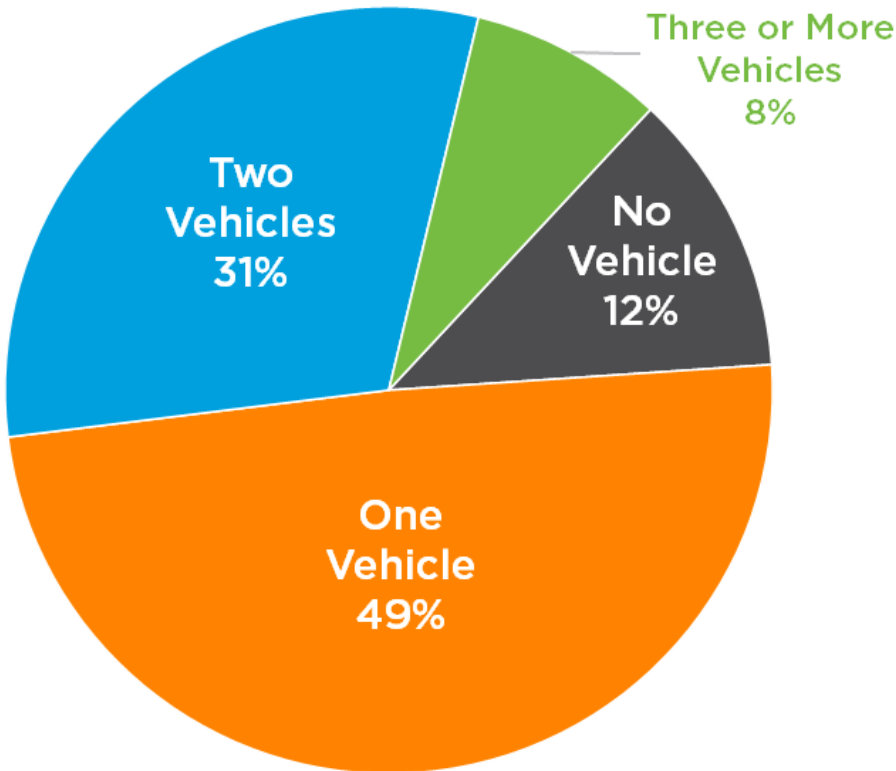
ACCESS TO VEHICLES FOR NEW HAMPSHIRE HOMEOWNER HOUSEHOLDS

2019-2023, Average Household Size: 2.59 People



ACCESS TO VEHICLES FOR NEW HAMPSHIRE RENTER HOUSEHOLDS

2019-2023, Average Household Size: 2.05 People



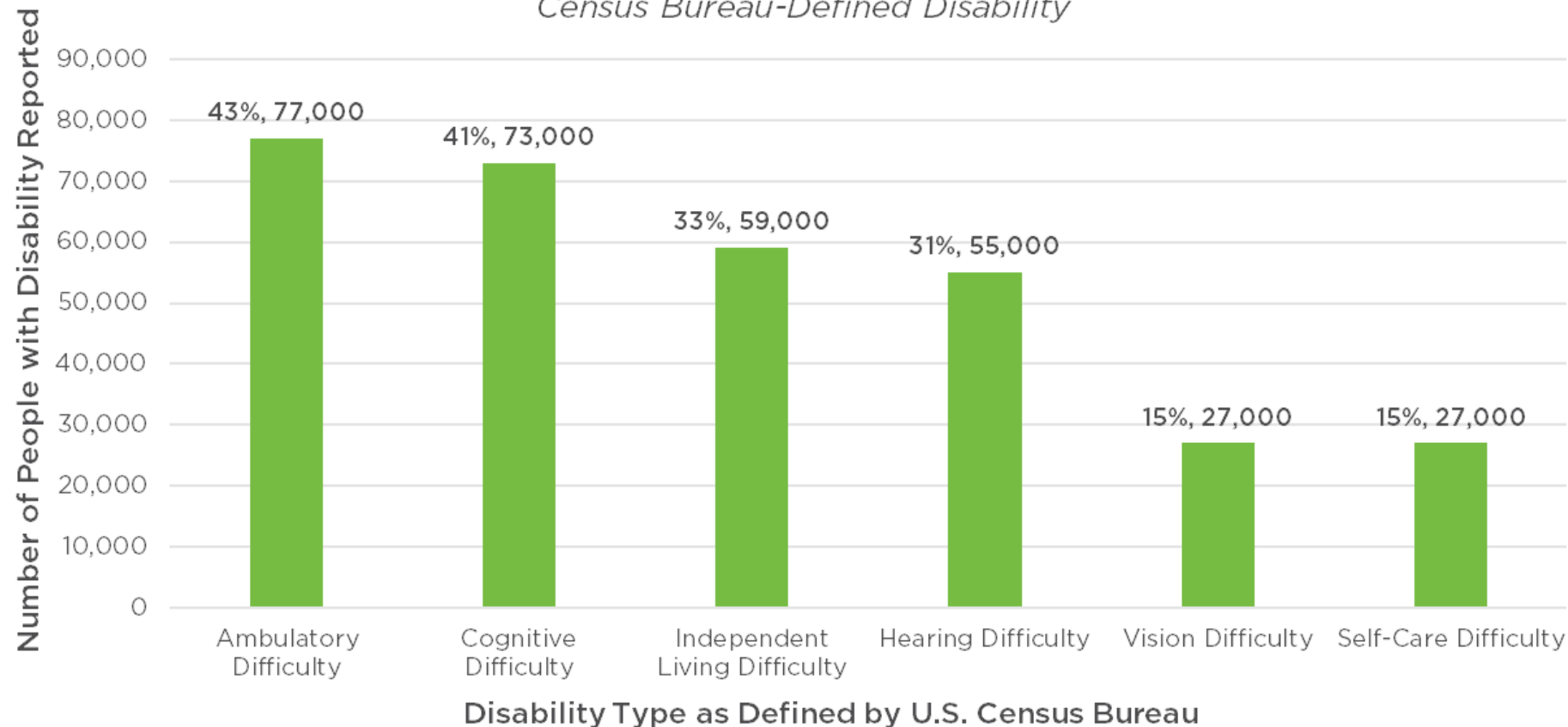
“No Vehicle” renters estimated to be 18,000 households.

About 60 percent of Granite Staters without access to a car have incomes below twice the poverty threshold (\$49,000 per year for two adults and one child), as do 35 percent of households with access to one car.

ABOUT 13 PERCENT OF GRANITE STATERS REPORT SOME FORM OF DISABILITY

DISABILITY TYPE BY PREVALENCE IN NEW HAMPSHIRE

New Hampshire, 2019-2023, Number and Percent of 179,000 Total with U.S. Census Bureau-Defined Disability



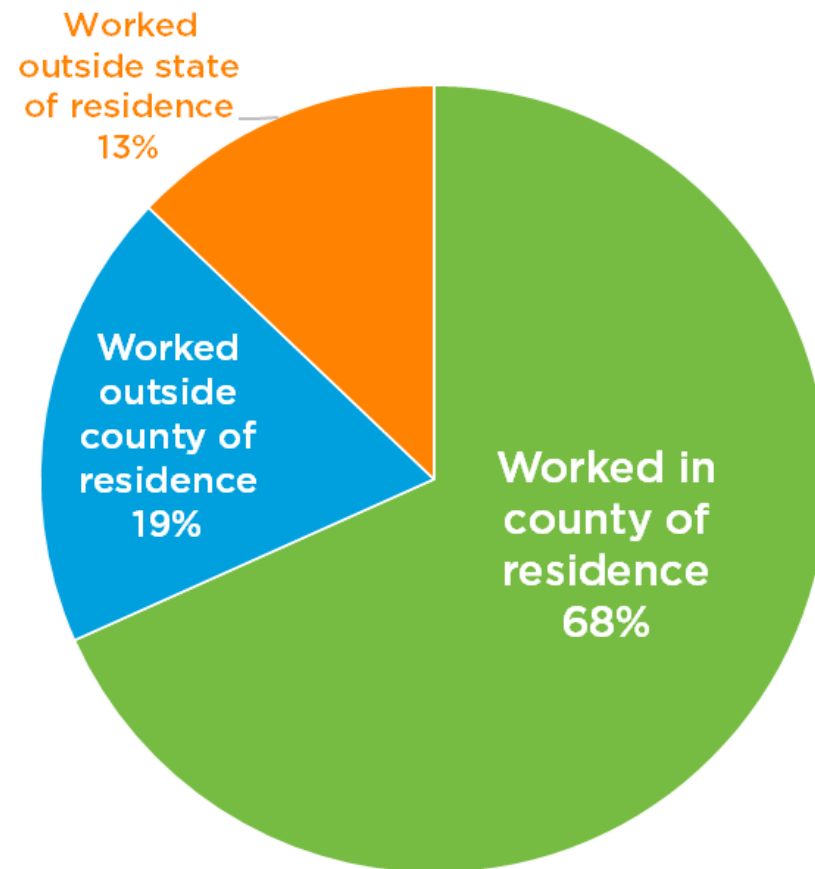
Source: U.S. Census Bureau, American Community Survey, 2019-2023

- About 29 percent of all residents in poverty in New Hampshire had a disability.
- The poverty rate for individuals with a disability was 16.1 percent, higher than the overall rate of 7.2 percent.
- For residents age 16 and over who were not in the labor force, the poverty rate was 15.7 percent.

Sources: U.S. Census Bureau, American Community Survey, 2019-2023 data; NHFPI March 2025 Issue Brief, Who is Experiencing Poverty in the Granite State?

HOUSING CONSTRAINT RAISES IMPORTANCE OF WITHIN-STATE COMMUTING

NEW HAMPSHIRE EMPLOYED RESIDENTS BY PLACE OF WORK



- No evidence yet of significant changes to commute travel time in New Hampshire in survey data in last ten years.
- Housing constraint may cause more people to need to travel further if it persists.

Sources: U.S. Census Bureau, American Community Survey, 2019-2023 data

Note: People working from home included in those working in their county of residence.
Source: U.S. Census Bureau, American Community Survey, Table S0802

KEY TAKEAWAYS

- Transportation costs are interrelated with other costs in household budgets
- Key transportation expenses in New Hampshire, particularly vehicle purchase prices and fuel, have outpaced inflation in recent years
- Housing, food, and child care costs have also risen, and lack of housing availability has increased prices statewide
- New Hampshire faces a significant workforce constraint, and relies on people being able to move into the state for population growth
- Enabling mobility of people within the state may be beneficial for boosting access to both workforce and for enhancing work opportunities for underserved populations and individuals with disabilities
- Overall economic growth and household economic security likely will be more dependent on ease of access to workplaces and services across geographies in the future due to the state's ongoing housing and labor force constraints

ADDITIONAL NHFPI RESOURCES

- Newsletter: The latest New Hampshire economic research and fiscal analysis – delivered straight to your inbox each week: <http://nhfpi.org/subscribe/>
- 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: New Hampshire's Labor Force Grew in 2024, but Growth Might Not Continue – April 21, 2025: <https://nhfpi.org/blog/new-hampshires-labor-force-grew-in-2024-but-growth-might-not-continue/>
- Blog: Multiple Affordable Housing Barriers Adversely Impact Communities, Adding Housing Expands Tax Base Beyond Key Costs – February 26, 2025: <https://nhfpi.org/blog/multiple-affordable-housing-barriers-adversely-impact-communities-adding-housing-expands-tax-base-beyond-key-costs/>
- Publication: New Hampshire Policy Points, Second Edition – December 6, 2024: <https://nhfpi.org/nhpp/>