Figure 1
Slow Labor Force Growth Will Contribute to Slower Growth in NH and the U.S.

Avg. Annual Labor Force Growth

<table>
<thead>
<tr>
<th>Time Period</th>
<th>Actual NH</th>
<th>Projected NH</th>
<th>Actual U.S.</th>
<th>Projected U.S.</th>
</tr>
</thead>
<tbody>
<tr>
<td>77-90</td>
<td>3.2%</td>
<td>2.0%</td>
<td>3.2%</td>
<td>2.5%</td>
</tr>
<tr>
<td>90-00</td>
<td>1.4%</td>
<td>1.2%</td>
<td>1.2%</td>
<td>1.5%</td>
</tr>
<tr>
<td>00-15</td>
<td>0.5%</td>
<td>0.5%</td>
<td>0.5%</td>
<td>0.6%</td>
</tr>
<tr>
<td>15-20</td>
<td>0.6%</td>
<td>0.7%</td>
<td>0.7%</td>
<td>0.8%</td>
</tr>
<tr>
<td>20-25</td>
<td>0.5%</td>
<td>0.6%</td>
<td>0.6%</td>
<td>0.7%</td>
</tr>
<tr>
<td>25-30</td>
<td>0.4%</td>
<td>0.5%</td>
<td>0.5%</td>
<td>0.6%</td>
</tr>
<tr>
<td>30-35</td>
<td>0.4%</td>
<td>0.4%</td>
<td>0.4%</td>
<td>0.4%</td>
</tr>
<tr>
<td>35-40</td>
<td>0.3%</td>
<td>0.4%</td>
<td>0.4%</td>
<td>0.5%</td>
</tr>
</tbody>
</table>
Figure 2
Drug Induced Deaths in New Hampshire Have More Than Doubled Just Since 2013

# of Drug Induced Deaths in NH
# of Alcohol Induced Deaths in NH

Source: Centers for Disease Control and Prevention, National Center for Health Statistics. “Underlying Cause of Death”
Figure 3

Over One-Half of Individuals in NH Receiving Substance Abuse Treatment are Now Doing So for Opiates and Opioids.

Source: Substance Abuse and Mental Health Services Administration, *Treatment Episode Data Set (TEDS A)*
Figure 4

NH Has the Second Highest Rate of Drug Induced Deaths per 100,000 Residents** Among the 50 States (2015 Data)

** This ratio is adjusted to account for differences in the age distribution of the population and for differences in the incidence of drug use among different age groups.
Figure 5

NH Now Ranks Second on the Percentage of Residents Age 12+ With an Alcohol or Drug Dependence or Abuse in the Past Year

Source: SAMSHA, National Survey on Drug Use and Health, 2014
Figure 6
Declines Among Young People With an Alcohol or Drug Dependency/Abuse is Offset by Increases Among Older Residents

Drug or Alcohol Abuse or Dependence in the Past Year

Source: SAMSHA, National Survey on Drug Use and Health, PolEcon
Figure 7
Determining the Economic Impact of Substance Misuse in New Hampshire

1. Prevalence
   - Determine the prevalence of the behavior (Substance Misuse) in New Hampshire

2. Adverse Outcomes
   - Identify the adverse outcomes associated with substance misuse

3. Causality
   - Determine the degree of causality between the substance misuse and adverse outcomes

4. Economic Values
   - Assign economic values to adverse outcomes
Figure 8

Industries in NH With More Younger and More Male Workers Bear a Greater Cost of Lost Productivity from Alcohol and Drug Abuse

<table>
<thead>
<tr>
<th>Industry</th>
<th>Alcohol</th>
<th>Drugs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Educ/Health/Soc. Services</td>
<td>5.4%</td>
<td>5.4%</td>
</tr>
<tr>
<td>Other Services</td>
<td>5.3%</td>
<td>1.6%</td>
</tr>
<tr>
<td>Retail</td>
<td>9.6%</td>
<td>2.7%</td>
</tr>
<tr>
<td>Prof. Services</td>
<td>10.0%</td>
<td>2.1%</td>
</tr>
<tr>
<td>F.I.R.E</td>
<td>9.3%</td>
<td>2.5%</td>
</tr>
<tr>
<td>Information</td>
<td>9.1%</td>
<td>2.1%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>8.6%</td>
<td>2.1%</td>
</tr>
<tr>
<td>Trans./Ware/Util.</td>
<td>8.2%</td>
<td>1.8%</td>
</tr>
<tr>
<td>Government</td>
<td>6.0%</td>
<td>1.0%</td>
</tr>
<tr>
<td>Construction</td>
<td>13.4%</td>
<td>3.2%</td>
</tr>
<tr>
<td>Wholesale</td>
<td>12.3%</td>
<td>2.5%</td>
</tr>
<tr>
<td>Arts/Rec./Accom./Food Srvcs.</td>
<td>14.0%</td>
<td>5.4%</td>
</tr>
</tbody>
</table>

Source: National Survey on Drug Use and Health, 2012, PolEcon
Prevention is the Most Cost Effective Way to Reduce Substance Misuse Costs – Unfortunately, NH Has the Third Highest Rate of Youth (Ages 12-17) Alcohol or Drug Abuse or Dependency in the Past Year

Figure 10
Substance Use Disorder Claims Increased Dramatically in NH Prior to Full Implementation of the ACA

<table>
<thead>
<tr>
<th>Year</th>
<th>Private Insurance Substance Abuse Related Claims</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>63,108</td>
</tr>
<tr>
<td>2013</td>
<td>377,495</td>
</tr>
<tr>
<td>2014</td>
<td>390,871</td>
</tr>
<tr>
<td>2015</td>
<td>348,988</td>
</tr>
</tbody>
</table>
Figure 11
Therapy Sessions Account for Nearly all of the Increase in Substance Use Disorder Private Health Insurance Claims

Change in # of Substance Use Health Ins. Claims 2012-2014

Psychotherapy Patient &/ Family 45 Minutes
Psychotherapy Patient &/ Family 60 Minutes
Psychiatric Diagnostic Evaluation
Psychotherapy Pt&/Family W/E&M Srvcs 45 Min
Psychotherapy Pt&/Family W/E&M Srvcs 30 Min
Psychotherapy Patient &/ Family 30 Minutes
Psychiatric Diagnostic Eval W/Medical Services
Alcohol and/or Drug Services; Intensive Outpatient

Source: NH Comprehensive Health Care Information System, Author’s calculations
On Average, Private Insurers in NH Paid About 43% of the Amount Billed For Substance Use Disorder Claims and Deductibles and Co-Pays Added Another 18%

Private Insurance Substance Abuse Claims: Amounts Billed and Paid

Source: PolEcon analysis of claims data in the NH Comprehensive Health Care Information System (NHCHIS)
The Number of Substance Abuse Treatment Facilities Has Increased as Health Ins. Coverage for Substance Use Disorders Has Been More Available

Mean Percentage of Billed Amounts Paid by Insurers and Individuals

- **Deductibles and Co-Payments**
  - SUD Claims: 21.7%
  - All Other Claims: 7.4%

- **Insurance Payments**
  - SUD Claims: 39.1%
  - All Other Claims: 39.2%

**Source:** Author’s analysis of 2015 insurance claims from the NH Comprehensive Health Care Information System
Insurance Claims for Substance Use Disorder Treatments Were Denied at Lower Rates Than Were Other Claims in 2015 – But “Prior-Authorization” Practices of Insurers May Be Impeding Access to Treatment

Source: Author’s analysis of 2015 insurance claims from the NH Comprehensive Health Care Information System
Figure 15
Medicaid Expansion Has Dramatically Increased the Number of Medicaid Claims for SUD Treatments in New Hampshire and an Additional 10,700 Individuals Received Treatment Because of Expansion

Medicaid Substance Use Disorder Claims
(Excluding Medically Assisted Treatments)
Figure 16
The Number of Substance Abuse Treatment Facilities Has Increased as Health Ins. Coverage for Substance Use Disorders Has Been More Available

Figure 17
Employment at Mental Health and Substance Abuse Care Facilities in NH is Also Rising

# of Employees in New Hampshire

Figure 18
Industries that Will be Adding Workers in Coming Decades and That Have More Workers Nearing Retirement Than Workers Early in Their Careers Will Face the Greatest Potential Labor Shortages – Including SUD Treatment Facilities

Ratio of Workers Age 22-34 to Workers 55+ By Industry in NH

- Construction: 128.7%
- Finance and Insurance: 113.3%
- Nursing and Residential Care Facilities: 108.6%
- Social Assistance: 102.6%
- All NH Industries: 101.2%
- Information: 92.1%
- Hospitals: 89.9%
- Psychiatric and Substance Abuse Hospitals: 82.9%
- Ambulatory Health Care Services: 78.1%
- Manufacturing: 66.0%
- Educational Services: 59.4%
- Public Administration: 55.8%
- Utilities: 43.1%
The Average Monthly Wage for Workers With at Least a BA Degree, Working In Industries that Provide SUD Treatment Services Have Lower Wages than Workers in other Health Care Industries
Figure 20
Substance Abuse Cost NH $2.36 Billion in 2014 Not Including the Cost of Premature Death

Annual Substance Abuse Costs in NH

- Productivity: $1,558.6
- Medical Care: $604.7
- Policing & Criminal Justice: $306.5
- Mortality: $337.1
- Other: $160.2