

THE ECONOMY AT A GLANCE

HOUSTON



GREATER HOUSTON
PARTNERSHIP.
Making Houston Greater.

A publication of the Greater Houston Partnership

Volume 27 Number 12 – December 2018

Table of Contents

2019 Houston Employment Forecast	1
Oil Patch Update	4
Where's Everyone Coming From	4
Snapshot – Key Economic Indicators	5
Economic Indicators Summary Table	6
Houston Nonfarm Employment	7

2019 HOUSTON EMPLOYMENT FORECAST

The Greater Houston Partnership forecasts the nine-county metro Houston area will create 71,000 jobs in '19.¹ Employment will grow in all sectors, with health care, construction and administrative services turning in the strongest performances. Energy will continue to recover. Manufacturing output will grow. Construction activity will pick up. Retail will benefit from population growth. Professional services will find new clients throughout the region. And health care will recapture its crown as the region's leading job generator.

The year should end with 3.2 million payroll jobs, a net increase of more than 600,000 over the past 10 years. Only New York, Los Angeles and Dallas created more jobs over the same period.

Where Are We Now?

Houston has emerged from one of the worst energy downturns of the past 35 years. Oil prices fell by 75 percent, the rig count by 80 percent, and exploration budgets by 62 percent. One in every four energy jobs in Houston was lost.

In previous downturns, a collapse in energy prices would have devastated the entire economy. This time, Houston held up quite well. Job losses in energy were offset by job gains elsewhere. Maybe the jobs didn't pay as well as the

ones lost, but they did offer opportunities for employment. Home sales plateaued but never plummeted. Weaker demand helped slow the escalation of home values that had priced many would-be buyers out of the market during the energy boom. The plunge in oil prices didn't precipitate a collapse in commercial real estate. However, some office building owners find themselves with too much empty space on their hands and few good options for filling it. The Federal Deposit Insurance Corporation didn't step in to take over any insolvent Houston banks, unlike the '80s, when all the city's largest banks failed. And while the local unemployment rate rose above the national rate, it never reached the levels of the Great Recession and stayed well below the peak experienced during the '80s.

What does all this tell us? Oil is still important, but it no longer determines Houston's fate. We survived the downturn with minimal damage to the overall economy because Houston's ties to the U.S. and global economies are as strong as its ties to the oil and gas industry. Now, the details behind the numbers.

Energy

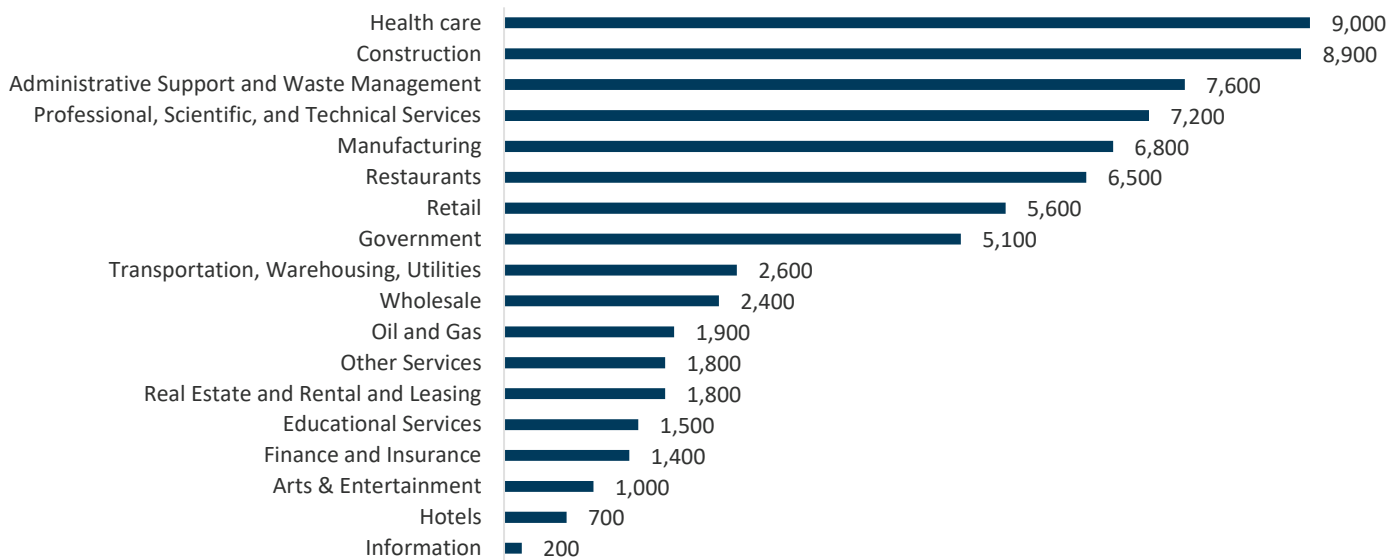
Oil is in the black again. In Q3/18, the combined profits of the 25 largest exploration, oil field service, and equipment manufacturing firms exceeded \$28.5 billion.

Though oil has trended downward since its October '18 peak, another period of low oil prices is unlikely to lead to significant layoffs. After three years of job cuts, staffing levels are thin. There's already a worker shortage in the industry, especially in the field. Firms worried about losing their crews or losing their leases will continue to drill wells.

Minor job cuts will still occur in '19, but these will be in response to companies selling assets or making strategic decisions to exit certain plays. The layoffs will be offset by hiring elsewhere, especially in oil field services, equipment manufacturing and digital analysis.

¹ The Partnership released its *2019 Houston Employment Forecast* on December 5. This newsletter contains a summary of that forecast. The full document can be found at the Partnership's website or by clicking [here](#).

METRO HOUSTON FORECAST, JOB GAINS December '18 - December '19



Source: Greater Houston Partnership

Construction

Other than in the office sector, construction activity is holding steady or picking up.

- Brokerage reports place the amount of vacant office space at 50 to 60 million square feet. Recovery is several years away.
- Developers have delivered 53 million square feet of industrial space over the past five years, yet the current vacancy rate stands at 5.1 percent. The needs of e-commerce, Houston's growing population and activity at the Port of Houston drive demand.
- The onslaught of e-commerce hasn't dampened demand for retail space. Over 4.7 million square feet is under construction, of which 75 percent is preleased.
- As of Q3/18, Houston was second in the nation in single-family housing starts, behind Dallas-Fort Worth. Multi-family construction has begun to pick up again.
- And in the four elections held since November '17, local voters approved \$8.7 billion in city, county and school district construction.

Manufacturing

The forecast sees continued growth in manufacturing tied to upstream energy, but at a slower pace than in '18. Shipments of chemicals, plastics and refined products should expand as plants constructed during the building boom find markets for their products overseas. And the

strong U.S. economy should spur further demand for "Made in Houston" goods.

Transportation and Utilities

With the improvement of Houston's economy, business and leisure travel has picked up. Trade through the region's four ports continues to grow. Midstream companies can't build pipelines fast enough to bring crude from the Permian Basin to the refineries and export terminals on the Texas Gulf Coast. And the region continues to add new homes and commercial buildings that will require service from local utilities.

Wholesale Trade

In Houston, wholesalers' fortunes tend to follow one of two paths—they track manufacturing, which tends to track the oil and gas industry, or they follow retail sales, which tend to track population, income and job growth. The outlook for energy and manufacturing is the brightest it's been in years. Strong employment and population growth should lift wholesale trade as well.

Hotels, Restaurants and Bars

CBRE estimates there are 40 hotels under construction. The new hotels will need to be staffed, but not to the levels they would be if demand were stronger. For restaurants and bars, growth depends on several factors—increases in budgets for business entertaining, growing consumer confidence, healthy job growth, increasingly hectic

lifestyles, consumers' willingness to try new concepts, and lack of will or skill to cook at home. All will support additional growth in '19.

Real Estate and Rentals

Leasing of office space has begun to pick up. The industrial market is the strongest of all commercial sectors. Developers continue to add apartments to the market. Home sales remain strong. Consumer rentals have grown with the population. Heavy equipment rentals saw a boost from post-Harvey cleanup, but that activity has wound down.

Retail

The fundamentals that drive retail—jobs, population, income, home construction, access to credit and consumer confidence—all favor Houston in '19.

- The region should add more than 70,000 jobs and at least 120,000 new residents.
- The Texas Workforce Commission reports wages have begun to grow again.
- The share of the region's population with subprime credit scores continues to decline, reports Equifax, and that suggests local consumers are finding it easier to finance their purchases.

Finance and Insurance

In banking, a handful of institutions have expansion plans, but job cuts will come as the industry reassesses the role branches and staff play in a world where most customers handle their banking on mobile phones. For insurance, Houston's population continues to grow, expanding the potential pool of auto, home, life and health insurance customers and the need for additional agents, claims processors and managers to service those accounts.

Professional Services

The forecast assumes that U.S. economic growth remains strong, that the energy industry continues to improve and that local economic growth provides opportunities for firms throughout the sector. Job growth throughout Houston should be better than average next year.

Administrative Support

As Houston's economy continues to expand firms will hire additional contract workers to handle increasing demand, outsourcing will be expanded, and firms will sign new contracts to maintain their landscaping and protect their properties.

Private Educational Services

A growing school-age population, parents' concerns about the quality of public education, workers seeking to upgrade skills to pursue new careers or hang on to the ones they have, and aggressive marketing by private universities will drive growth in this sector in '19.

Health Care

While the industry is under constant pressure to control costs, its patient load continues to expand.

- The region records 100,000 births each year. Each baby begins a cycle of checkups, vaccinations and treatments for typical childhood illnesses.
- The region adds population every year through net migration. Each arrival will eventually need to find a doctor, dentist or preferred clinic in this new hometown.
- Houston's over-65 population expands by 30,000 residents each year. As seniors deal with the maladies of aging, they tend to visit the doctor, the clinic and the hospital more frequently.

The forecast assumes population and job growth will continue, U.S. and state legislators make no significant changes to the ACA, Medicare and Medicaid programs, and no mass layoffs at area hospitals.

Arts and Entertainment

Growth will be organic and based on the same factors influencing retail growth—income, population and employment.

Government

As the region's population grows, so does the need for police and fire protection, water and sewer services, libraries and road repairs. The ability to expand those services depends on property, sales and franchise taxes.

Though sales tax collections have picked up, the City of Houston's charter limits growth in property tax revenues to the combined rates of inflation and population growth, or 4.5 percent, whichever is lower. Furthermore, in the November '18 election, voters approved Houston firefighters receiving pay parity with Houston police officers. Mayor Sylvester Turner estimates the cost to the city at roughly \$100 million in '19. Given that Houston is not allowed to raise taxes to pay for the salary increase, the city will need to cut expenses elsewhere. Mayor Turner has said this constraint could lead to layoffs of as many as 800 city employees.

The Texas Education Agency (TEA) has designated the Houston Independent School District a property-rich district, meaning HISD must share its wealth with property-

poor districts in the state. HISD is not alone. More than 400 districts across the state, 18 in the Houston area, are considered property-rich and required to send money to Austin. This drain limits their ability to hire additional teachers and staff to serve growing populations.

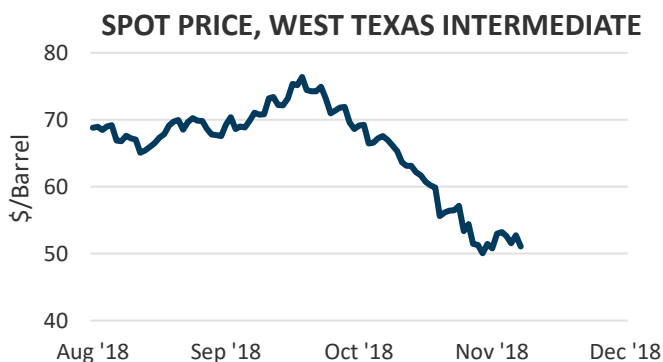
Given all these factors, even with a healthy economy, Houston is unlikely to see a surge in public sector employment in '19.

In Summary

The external factors that drive Houston's growth—energy prices, the ongoing U.S. expansion, and global growth—still align in Houston's favor. The internal factors—net migration, construction, consumer confidence—fall into place as well. Houston should enjoy healthy economic growth in '19, and barring a U.S. or global downturn, or a collapse in oil prices, that growth should continue into '20.

OIL PATCH UPDATE

The spot price for West Texas Intermediate (WTI), the U.S. benchmark for light, sweet crude, rose to \$76.40 per barrel in early October, only to fall 33.1 percent over the next three months, hitting \$51.70 in early December.



Source: U.S. Energy Information Administration

Several factors have contributed to falling prices. Crude oil production from the world's three largest producers—the United States, Russia, and Saudi Arabia—were at or near record levels in November. Implementation of sanctions on Iran began on November 5, but the United States granted waivers for some of Iran's largest customers to continue importing limited volumes of crude oil for six months. In addition, concerns about the pace of global economic growth in coming months have led to related concerns about the pace of oil demand growth. Forecasts of demand growth range from 1.3 to 1.5 million barrels per day.

In early December, the Organization of the Petroleum Exporting Countries (OPEC) and several non-OPEC countries agreed to reduce their production by 1.2 million barrels per day (b/d) from their October production levels. The cuts are to last six months, beginning in January '19.

OPEC agreed to cut production by 800,000 b/d and Russia and non-OPEC producers agreed to cut 400,000 b/d from their production.

The U.S. Energy Information Administration (EIA) expects that the recent price declines, combined with the OPEC+ production cuts, will bring supply and demand into balance next year. In its December *Short-Term Energy Outlook*, EIA forecasts WTI to average \$54 per barrel in '19, down sharply from \$65 in EIA's November forecast.

EIA estimates that U.S. crude oil production averaged 11.5 million b/d in November, up 150,000 b/d from October, largely due to offshore platforms resuming normal operations after hurricane-related outages in October. EIA expects that U.S. crude oil production will average 10.9 million b/d in '18, up from 9.4 million b/d in '17, and will average 12.1 million b/d in '19. As recently as '10, the U.S. produced less than 6.0 million barrels per day.

WHERE'S EVERYONE COMING FROM?

Houston attracted residents from all 50 states in '16, with five—California, Florida, New York, Illinois and Louisiana — supplying the most residents. The first four are to be expected, given they are among the nation's most populous states and therefore have the most to give. Nor should Louisiana be a surprise, given its ties to the energy industry and the historic mobility of the industry's workforce. The same holds true for Colorado and Oklahoma.

The rankings are based on data from the Internal Revenue Service (IRS) that track year-to-year address changes reported on individual income tax returns filed with agency.

TOP 10 STATES SUPPLYING NEW RESIDENTS TO HOUSTON IN '16

Rank	State	Residents
1	California	10,756
2	Louisiana	7,509
3	Florida	6,382
4	New York	4,939
5	Illinois	3,777
6	Virginia	3,533
7	Colorado	2,452
8	Georgia	2,181
9	Oklahoma	2,206
10	New Jersey	2,072

Source: Partnership analysis of Internal Revenue Service migration data

By far, the state of Texas supplied the most new residents (53,405) to metro Houston in '16. They came from 92 different counties. Those counties sending the most were Travis (6,190) Bexar (4,639), Dallas (4,374), Jefferson (3,127) and Tarrant (3,105).

SNAPSHOT – KEY ECONOMIC INDICATORS



Aviation — The Houston Airport System (HAS) handled 57.8 million passengers in the 12 months ending Oct '18, up 7.4 percent from the 53.8 million handled in the prior 12 months. International passenger volume totaled 11.6 million, up 3.1 percent from 11.3 million for the 12 months ending Oct '17. Domestic volume totaled 46.2 million, an 8.5 percent increase from 42.5 million for the 12 months ending Oct '17.



Building Permits — City of Houston building permits totaled \$505.4 million in Oct '18, up 12.4 percent from \$449.8 million in Oct '17. For the 12 months ending Oct '18, commercial permit values fell 5.4 percent to \$3.4 billion, and residential permit values rose 36.5 percent to \$2.9 billion.



Business-Cycle Index — Growth in the Houston Business-Cycle Index was 6.8 percent during the three months ending in September '18, continuing its healthy expansion from the first half of the year.



Construction — Construction starts in metro Houston totaled \$3.4 billion in Oct '18, a 79.5 percent increase from \$1.9 billion in Oct '17. Through the 12 months ending Oct '18, starts totaled \$20.6 billion, up 16.2 percent from \$17.7 billion for the 12 months ending Oct '17.



Crude Oil — The spot closing price for a barrel of West Texas Intermediate (WTI), the U.S. benchmark for light crude, averaged \$66.34 per barrel through the first 11 months of '18, a 32.0 percent increase from \$50.25 for the same span in '17. EIA forecasts \$54 per barrel in '19.



Home Sales — Local realtors sold 90,868 homes through November, up 4.8 percent from the 86,738 sold over the same period in '17. Area realtors closed on 7,400 properties (single-family, duplexes, townhomes and condos) in November, marginally down from 7,421 in November of '17. The median price of a single-family home sold in November was \$235,000, up \$10,000 from November of last year.



Inflation — In the Houston-The Woodlands-Sugar Land metro area, the energy index rose 7.7 percent, the shelter index ticked up 2.5 percent and grocery prices fell by 0.8 percent over the 12 months ending this November.



Natural Gas — Natural gas prices averaged \$3.09 per million British thermal units (MMBtu) through the first 11 months of '18, up 3.0 percent from \$3.00 for the same period in '17. The spot price forecast for '19 is \$3.11 MMBtu.



Purchasing Managers Index — The Houston Purchasing Managers Index (PMI), a short-term leading indicator for regional production, registered 54.9 in November, down minimally from 55.0 in October.



Rig Count — Baker Hughes reports 1,075 drilling rigs were working in the U.S. during the first week of December. That's up 144 rigs, or 15.5 percent, from the same week in December last year. The rig count has trended upward since early November '17.



Trade — Through October of this year, \$194.6 billion in goods and commodities passed through the Houston/Galveston Customs District, up 23.7 percent from \$157.3 billion over the same period in '17. Exports totaled \$116.2 billion, up 32.1 percent. Imports totaled \$78.4 billion, up 13.0 percent.



Vehicle Sales — Houston-area auto dealers sold 33,518 new vehicles in Oct '18, the highest monthly sales volume since July '15 and a 0.9 percent increase from last Oct. For the 12 months ending Oct '18, Houston-area dealers sold 307,430 vehicles, up 7.6 percent from the 285,604 sold in the 12 months ending Oct '17.

Patrick Jankowski, Nadia Valliani and Melissa Verhoef contributed to this issue of Houston: The Economy at a Glance.

STAY UP TO DATE!

For past issues of *Economy at a Glance*, click [here](#).

If you are not a member of the Greater Houston Partnership and would like to subscribe to *Economy at a Glance*, please click [here](#) and enter your email address. For information about joining the Greater Houston Partnership, call Member Engagement at 713-844-3683.

The Key Economic Indicators table is updated **whenever any data change** — typically, six or so times per month. If you would like to receive these updates by e-mail, usually accompanied by commentary, click [here](#).

HOUSTON ECONOMIC INDICATORS

	Month	MONTHLY DATA			YEAR-TO-DATE TOTAL or YTD AVERAGE*		
		Most Recent	Year Earlier	% Change	Most Recent	Year Earlier	% Change
ENERGY							
U.S. Active Rotary Rigs	Nov '18	1,077	911	18.2	1,028 *	871 *	18.0
Spot Crude Oil Price (\$/bbl, West Texas Intermediate)	Nov '18	59.96	56.64	5.9	66.34 *	50.25 *	32.0
Spot Natural Gas (\$/MMBtu, Henry Hub)	Nov '18	4.09	3.01	35.9	3.09 *	3.00 *	3.0
UTILITIES AND PRODUCTION							
Houston Purchasing Managers Index	Nov '18	54.9	52.8	4.0	56.9 *	51.7 *	10.1
Nonresidential Electric Current Sales (Mwh, CNP Service Area)	Nov '18	4,491,645	4,656,911	-3.5	55,317,146	54,128,833	2.2
CONSTRUCTION							
Building Permits (\$, City of Houston)	Oct '18	505,425,242	449,774,908	12.4	5,103,141,712	4,926,849,807	3.6
Nonresidential	Oct '18	327,707,735	264,900,194	23.7	2,800,856,810	3,093,028,576	-9.4
<i>New Nonresidential</i>	<i>Oct '18</i>	<i>121,077,502</i>	<i>77,541,478</i>	<i>56.1</i>	<i>1,033,601,975</i>	<i>1,220,036,442</i>	<i>-15.3</i>
<i>Nonresidential Additions/Alterations/Conversions</i>	<i>Oct '18</i>	<i>206,630,233</i>	<i>187,358,716</i>	<i>10.3</i>	<i>1,767,254,835</i>	<i>1,872,992,134</i>	<i>-5.6</i>
Residential	Oct '18	177,717,507	184,874,714	-3.9	2,302,284,902	1,833,821,231	25.5
<i>New Residential</i>	<i>Oct '18</i>	<i>134,197,029</i>	<i>112,068,822</i>	<i>19.7</i>	<i>1,853,983,321</i>	<i>1,439,150,957</i>	<i>28.8</i>
<i>Residential Additions/Alterations/Conversions</i>	<i>Oct '18</i>	<i>43,520,478</i>	<i>72,805,892</i>	<i>-40.2</i>	<i>448,301,581</i>	<i>394,670,274</i>	<i>13.6</i>
Multiple Listing Service (MLS) Activity							
Property Sales	Nov '18	7,400	7,421	-0.3	90,868	86,738	4.8
Median Sales Price - SF Detached	Nov '18	235,000	225,000	4.4	235,888 *	227,858 *	3.5
Active Listings	Nov '18	40,530	37,233	8.9	38,744 *	38,883 *	-0.4
EMPLOYMENT (Houston-The Woodlands-Sugar Land MSA)							
Nonfarm Payroll Employment	Oct '18	3,158,800	3,041,000	3.9	3,104,090 *	3,011,920 *	3.1
Goods Producing (Natural Resources/Mining/Const/Mfg)	Oct '18	560,200	514,000	9.0	540,890 *	511,980 *	5.6
Service Providing	Oct '18	2,598,600	2,527,000	2.8	2,563,200 *	2,499,940 *	2.5
Unemployment Rate (%) - Not Seasonally Adjusted							
Houston-Sugar Land-Baytown MSA	Oct '18	3.8	4.4		4.4 *	5.1 *	
Texas	Oct '18	3.5	3.7		3.9 *	4.4 *	
U.S.	Oct '18	3.5	3.9		4.0 *	4.4 *	
TRANSPORTATION							
Port of Houston Authority Shipments (Short Tons)	Oct '18	3,803,988	3,528,639	7.8	39,332,100	37,035,685	6.2
Air Passengers (Houston Airport System)	Oct '18	4,837,134	4,582,822	5.5	48,258,509	44,621,323	8.2
Domestic Passengers	Oct '18	3,963,314	3,731,446	6.2	38,468,918	35,236,881	9.2
International Passengers	Oct '18	873,820	851,376	2.6	9,789,591	9,384,442	4.3
Air Freight (metric tons)	Oct '18	46,708	39,856	17.2	423,057	356,051	18.8
CONSUMERS							
New Car and Truck Sales (Units, Houston MSA)	Oct '18	33,518	33,211	0.9	255,954	238,878	7.1
Cars	Oct '18	10,457	11,457	-8.7	75,450	80,725	-6.5
Trucks, SUVs and Commercial	Oct '18	23,061	21,754	6.0	180,504	158,153	14.1
Total Retail Sales (\$000,000, Houston MSA, NAICS Basis)	Q2/18	30,304	28,544	6.2	59,620	55,595	7.2
Consumer Price Index for All Urban Consumers ('82-'84=100)							
Houston-Galveston-Brazoria CMSA	Nov '18	228.070	222.391	2.6	226.165 *	220.730 *	2.5
United States	Nov '18	252.038	246.669	2.2	251.095 *	244.992 *	2.5
Hotel Performance (Houston MSA)							
Occupancy (%)	Q3/18	59.8	67.3		64.8 *	64.6 *	
Average Room Rate (\$)	Q3/18	100.30	102.47	-2.1	106.31 *	107.37 *	-1.0
Revenue Per Available Room (\$)	Q3/18	59.94	68.99	-13.1	69.04 *	69.34 *	-0.4
SOURCES							
Aviation	City of Houston Department of Aviation						
Building Construction Contracts	Dodge Data & Analytics						
Car and Truck Sales	TexAuto Facts Report , InfoNation, Inc., Sugar Land TX						
City of Houston Building Permits	Public Works & Engineering Planning & Development, City of Houston						
Consumer Price Index	U.S. Bureau of Labor Statistics						
Electricity	CenterPoint Energy						
Employment, Unemployment	Texas Workforce Commission						
Hotels	CBRE						
Houston Purchasing Managers Index	Institute for Supply Management-Houston						
MLS Data	Houston Association of Realtors®						
Port Shipments	Port of Houston Authority						
Retail Sales	Texas Comptroller's Office						
Rig Count	Baker Hughes Incorporated						

HOUSTON MSA NONFARM PAYROLL EMPLOYMENT (000)

	Oct '18	Sep '18	Oct '17	Change from		% Change from	
				Sep '18	Oct '17	Sep '18	Oct '17
Total Nonfarm Payroll Jobs	3,158.8	3,135.2	3,041.0	23.6	117.8	0.8	3.9
<i>Total Private</i>	<i>2,745.0</i>	<i>2,729.6</i>	<i>2,629.0</i>	<i>15.4</i>	<i>116.0</i>	<i>0.6</i>	<i>4.4</i>
<i>Goods Producing</i>	<i>560.2</i>	<i>556.7</i>	<i>514.0</i>	<i>3.5</i>	<i>46.2</i>	<i>0.6</i>	<i>9.0</i>
<i>Service Providing</i>	<i>2,598.6</i>	<i>2,578.5</i>	<i>2,527.0</i>	<i>20.1</i>	<i>71.6</i>	<i>0.8</i>	<i>2.8</i>
<i>Private Service Providing</i>	<i>2,184.8</i>	<i>2,172.9</i>	<i>2,115.0</i>	<i>11.9</i>	<i>69.8</i>	<i>0.5</i>	<i>3.3</i>
Mining and Logging	81.6	80.4	77.1	1.2	4.5	1.5	5.8
Oil & Gas Extraction	35.9	35.8	37.2	0.1	-1.3	0.3	-3.5
Support Activities for Mining	44.3	43.3	39.0	1.0	5.3	2.3	13.6
Construction	245.8	243.7	220.2	2.1	25.6	0.9	11.6
Manufacturing	232.8	232.6	216.7	0.2	16.1	0.1	7.4
Durable Goods Manufacturing	148.9	149.2	135.2	-0.3	13.7	-0.2	10.1
Nondurable Goods Manufacturing	83.9	83.4	81.5	0.5	2.4	0.6	2.9
Wholesale Trade	171.0	170.2	166.2	0.8	4.8	0.5	2.9
Retail Trade	316.9	314.6	311.3	2.3	5.6	0.7	1.8
Transportation, Warehousing and Utilities	148.0	145.0	142.4	3.0	5.6	2.1	3.9
Utilities	16.4	16.3	16.5	0.1	-0.1	0.6	-0.6
Air Transportation	20.9	20.9	21.1	0.0	-0.2	0.0	-0.9
Truck Transportation	26.1	26.2	25.5	-0.1	0.6	-0.4	2.4
Pipeline Transportation	11.4	11.4	11.6	0.0	-0.2	0.0	-1.7
Information	31.0	30.8	31.2	0.2	-0.2	0.6	-0.6
Telecommunications	13.0	13.0	13.6	0.0	-0.6	0.0	-4.4
Finance & Insurance	101.8	100.9	100.5	0.9	1.3	0.9	1.3
Real Estate & Rental and Leasing	63.4	63.7	59.9	-0.3	3.5	-0.5	5.8
Professional & Business Services	519.4	517.0	488.8	2.4	30.6	0.5	6.3
Professional, Scientific & Technical Services	238.1	235.6	223.1	2.5	15.0	1.1	6.7
<i>Legal Services</i>	<i>26.1</i>	<i>25.9</i>	<i>25.7</i>	<i>0.2</i>	<i>0.4</i>	<i>0.8</i>	<i>1.6</i>
<i>Accounting, Tax Preparation, Bookkeeping</i>	<i>25.7</i>	<i>25.2</i>	<i>25.4</i>	<i>0.5</i>	<i>0.3</i>	<i>2.0</i>	<i>1.2</i>
<i>Architectural, Engineering & Related Services</i>	<i>70.1</i>	<i>68.3</i>	<i>66.5</i>	<i>1.8</i>	<i>3.6</i>	<i>2.6</i>	<i>5.4</i>
<i>Computer Systems Design & Related Services</i>	<i>33.5</i>	<i>33.9</i>	<i>31.7</i>	<i>-0.4</i>	<i>1.8</i>	<i>-1.2</i>	<i>5.7</i>
Admin & Support/Waste Mgt & Remediation	237.9	238.4	223.0	-0.5	14.9	-0.2	6.7
<i>Administrative & Support Services</i>	<i>226.4</i>	<i>227.1</i>	<i>209.9</i>	<i>-0.7</i>	<i>16.5</i>	<i>-0.3</i>	<i>7.9</i>
<i>Employment Services</i>	<i>99.7</i>	<i>97.5</i>	<i>88.5</i>	<i>2.2</i>	<i>11.2</i>	<i>2.3</i>	<i>12.7</i>
Educational Services	61.3	61.0	59.6	0.3	1.7	0.5	2.9
Health Care & Social Assistance	333.8	333.1	326.7	0.7	7.1	0.2	2.2
Arts, Entertainment & Recreation	35.3	36.4	32.9	-1.1	2.4	-3.0	7.3
Accommodation & Food Services	288.3	287.7	287.0	0.6	1.3	0.2	0.5
Other Services	114.6	112.5	108.5	2.1	6.1	1.9	5.6
Government	413.8	405.6	412.0	8.2	1.8	2.0	0.4
Federal Government	29.1	29.3	29.1	-0.2	0.0	-0.7	0.0
State Government	86.4	85.7	85.3	0.7	1.1	0.8	1.3
<i>State Government Educational Services</i>	<i>51.2</i>	<i>50.3</i>	<i>50.6</i>	<i>0.9</i>	<i>0.6</i>	<i>1.8</i>	<i>1.2</i>
Local Government	298.3	290.6	297.6	7.7	0.7	2.6	0.2
<i>Local Government Educational Services</i>	<i>209.9</i>	<i>202.4</i>	<i>209.8</i>	<i>7.5</i>	<i>0.1</i>	<i>3.7</i>	<i>0.0</i>

SOURCE: Texas Workforce Commission