

THE ECONOMY AT A GLANCE

HOUSTON



GREATER HOUSTON
PARTNERSHIP.

Making Houston Greater.

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DEMOGRAPHIC UPDATE

One-third of metro Houston’s population now lives outside Harris County. International migration to the region has outpaced domestic migration so far this decade. Hispanics account for more than half of metro Houston’s population gains since ’10. And overall population growth has been weak in recent years, initially due to the downturn in the oil and gas industry and more recently due to Hurricane Harvey. Those are the key findings in the Partnership’s analysis of data released this spring by the U.S. Census Bureau.

The Bureau posted population estimates for U.S. metros in April. Metro Houston has a population of nearly 7.0 million, a gain of just over 1.0 million since ’10. The Bureau released estimates for cities in May. The city of Houston has a population of 2.3 million, a net gain of 232,000 since ’10. But growth has slowed recently. At the current pace, Houston won’t overtake Chicago for another 25 years. In June, the Bureau issued estimates for births, deaths, net migration, race, ethnicity, age and gender for all U.S. counties. The data underscored several long-standing trends for Houston and suggested a few new ones are underway.

The Big Picture

All nine counties in the Houston metro area gained population over the past eight years. Harris County added the most residents, followed by Fort Bend, Montgomery and Brazoria. Fort Bend grew the fastest, followed by Montgomery and Waller Counties. Among all U.S. counties, Fort Bend ranked as the nation’s 10th fastest growing from ’10

to ’18, Montgomery ranked 18th, Waller 41st, Chambers 52nd and Brazoria 83rd.

CHANGE IN METRO HOUSTON POPULATION

	Population as of July 1		Change	
	'18	'10	#	%
Austin	29,989	28,362	1,627	5.7
Brazoria	370,200	314,447	55,753	17.7
Chambers	42,454	35,446	7,008	19.8
Fort Bend	787,858	590,260	197,598	33.5
Galveston	337,890	292,476	45,414	15.5
Harris	4,698,619	4,107,828	590,791	14.4
Liberty	86,323	75,856	10,467	13.8
Montgomery	590,925	459,210	131,715	28.7
Waller	53,126	43,524	9,602	22.1
Total	6,997,384	5,947,409	1,049,975	17.7

Source: U.S. Census Bureau

International Migration

The June data included revisions to domestic and international migration for the region. Domestic migration includes anyone who moved to Houston from elsewhere in the U.S. International migration includes anyone who moved here from abroad, including ex-pats returning home, workers on H1-B visas, foreign students enrolled at local colleges, and legal and undocumented immigrants.

The Bureau revised its estimates back to ’10. The revisions show international migration to be stronger than originally reported and domestic migration marginally weaker. On net, Houston has gained 61,452 more residents from abroad than from the U.S. this decade.

NET MIGRATION TO HOUSTON

	International	Domestic	Difference*
'11	26,921	22,996	+3,925
'12	30,982	39,429	-8,447
'13	32,796	55,078	-22,282
'14	43,797	67,247	-23,450
'15	47,902	61,960	-14,058
'16	45,475	27,206	+18,269
'17	43,948	-9,874	+53,822
'18	44,535	-9,138	+53,673
Total	316,356	254,904	+61,452

* International minus domestic

Source: U.S. Census Bureau

Continued Shift to the Suburbs

Migration to the suburbs has been underway since the '70s. The trend continued in the '10s. Harris County, with two-thirds of the region's population, captured only 56.3 percent of the region's growth over the past eight years. The suburban counties, with one-third of the region's population, captured 43.8 percent of the growth.

PERCENT OF METRO HOUSTON POPULATION

	'70	'80	'90	'00	'10	'18
City of Houston	56.2	50.8	43.7	41.6	35.1	33.2
Harris County	79.4	76.8	75.1	72.5	68.5	67.1
Adjacent Counties	20.6	23.2	24.9	27.5	31.5	32.9

Source: U.S. Census Bureau

Challenges for Harris County

The May issue of [Glance](#) documented negative domestic migration for the region in '17 and '18. Data released in June indicate Harris County accounted for all the losses. Outmigration from Harris started in '16 and continued through '18. The combined loss for those three years exceeded 100,000 residents. The losses of the past three years wiped out any earlier gains for Harris County from domestic migration. No other Houston metro county experienced any loss.

DOMESTIC MIGRATION, METRO HOUSTON, '10 – '18

County	Gains/Losses	% of Metro Gain
Fort Bend	108,430	42.5
Montgomery	90,615	35.5
Brazoria	30,708	12.0
Galveston	28,840	11.3
Liberty	7,376	2.9
Waller	6,625	2.6
Chambers	4,481	1.8
Austin	805	0.3
Harris	-22,976	-
Net Domestic Migration	254,904	100.0

Source: Partnership calculations based on U.S. Census Bureau data

If not for strong international migration, population growth for Harris County (and the region) would be weaker still. During the first half of the decade, international migration to Harris averaged 29,300 residents per year. From '16 to '18, it averaged 36,000 per year, enough to offset losses from domestic outmigration those years.

One shouldn't assume the strong international migration resulted from a wave of undocumented immigrants coming into the region. Census does not provide estimates for legal and illegal migration, but a recent study by the [Pew Research Center](#) suggests the region's undocumented population grew only marginally between '07 and '16.

INTERNATIONAL MIGRATION, METRO HOUSTON, '10 – '18

County	Gains/Losses	% of Gain
Harris	254,595	80.5
Fort Bend	38,568	12.2
Montgomery	12,249	3.9
Brazoria	4,737	1.5
Galveston	4,418	1.4
Chambers	624	0.2
Liberty	547	0.2
Waller	396	0.1
Austin	222	0.1
Net Int'l Migration	316,356	100.0

Source: Partnership calculations based on U.S. Census Bureau data

Harris County also benefited from a large natural population increase (*i.e.*, births minus deaths). The county recorded nearly 557,000 births and 200,000 deaths since '10, a natural increase of about 357,000 residents.

Negative migration is likely a short-term phenomenon for Harris County. The outflow of residents in '16 and '17 coincided with the energy industry cutting 92,400 jobs. Many of the unemployed likely left Harris for better job prospects in other metros or counties. The outflow in '18 was the likely aftereffect of Hurricane Harvey since Harris was hit hardest by the storm. The Texas Department of Public Safety estimates 116,000 homes were damaged in the county. Many homeowners undoubtedly chose to leave the region rather than stay and rebuild. Domestic migration should turn positive again now that job growth has picked up and anyone leaving the region because of Harvey has probably done so by now.

Age Profile

The share of Houston's population represented by Millennials (ages 18-38) continues to grow while Baby Boomers' share (ages 53-73) continues to shrink.

SELECTED GENERATIONS, METRO HOUSTON

Generation	Population		% of Total	
	'10	'18	'10	'18
Silent Gen	420,859	262,040	7.1	3.7
Boomers	1,481,292	1,361,155	24.9	19.5
Generation X	1,216,433	1,304,329	20.5	18.6
Millennials	1,838,712	2,603,123	30.9	37.2
All Others	990,113	1,466,737	16.6	21.0
Total	5,947,409	6,997,384	100.0	100.0

Source: Partnership calculations based on U.S. Census Bureau data

Among the nine counties, Waller had the lowest median age (29.7 years, reflecting the presence of Prairie View A&M), followed by Harris (33.7), then Chambers (35.1),

Liberty (35.2), Brazoria (35.8), Montgomery (36.9), Galveston (37.9) and Austin (41.2).

Racial/Ethnic Growth

From '10 to '18, Houston's Hispanic community has recorded the region's largest population gains. The Asian population, however, has grown at a faster rate. The Black population is growing fast enough to maintain its share of the region's population. Non-Hispanic Whites have recorded the weakest gains among the four major racial/ethnic groups, both in numbers and percent change.

METRO HOUSTON RACIAL/ETHNIC MIX

Race/Ethnic Group	'18	Change Since '10	
	Pop.	#	%
Hispanic	2,633,283	522,657	24.8
White	2,494,082	140,646	6.0
Black	1,191,801	186,800	18.6
Asian	556,574	163,446	41.6
Two or More Races	15,635	1,538	10.9
AIAN	3,724	690	22.7
NHPI	102,285	14,097	20.7
Total	6,997,384	1,029,874	17.7

AIAN = American Indian or Alaska Native

NHPI = Native Hawaiian or Pacific Islander

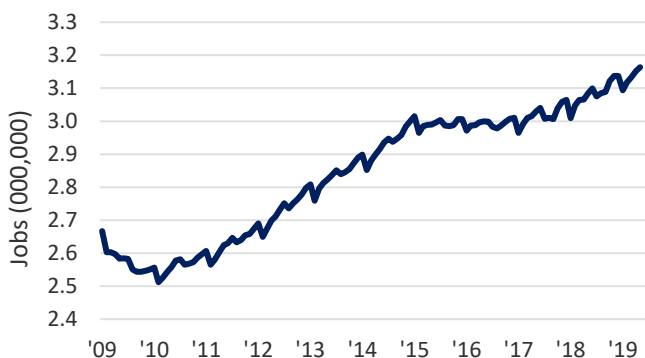
Source: Partnership calculations based on U.S. Census Bureau data

EMPLOYMENT – THE SHORT VIEW

Metro Houston created 79,800 jobs, a 2.6 percent increase, in the 12 months ending May '19, according to the Texas Workforce Commission (TWC). Employment now stands at 3,163,600, the highest point on record. At the current pace of growth, the region should top 3.2 million jobs by year's end.

The sectors adding the most jobs over the past 12 months were professional, scientific, and technical services (18,000); durable goods manufacturing (13,300); health care (9,100); and other services (6,800).

Metro Houston Nonfarm Employment



Source: Texas Workforce Commission

Employment decreased in a few sectors. The greatest losses occurred in retail (-6,100); employment services (-2,400); and information (-1,100).

The metro area created 12,100 jobs in May, in line with the 30-year average of 12,500 jobs typical for the month. If the remainder of the year follows historic patterns, the region should end the year with a net gain of 68,000 jobs.

EMPLOYMENT – THE LONG VIEW

The recovery in the oil and gas industry began in earnest three years ago this summer. Crude prices began improving in March '16, the rig count in May '16, and bankruptcies plateaued in the second quarter of the year. But energy employment didn't see an uptick until January '17 and continues to struggle. From peak to trough, the sector cut nearly 93,000 jobs. While pipeline and liquid natural gas projects have helped engineering recoup all its losses, upstream and manufacturing have recovered only a fraction of theirs.

ENERGY EMPLOYMENT IN METRO HOUSTON

	Lost Peak to Trough	Recovered as of 5/19	Percent Recovered
Exploration/Production	22,300	1,200	5.5
Oil Field Services	20,800	10,300	49.5
Oil Field Equipment Mfg	18,000	12,600	60.9
Fabricated Metals	20,800	4,800	26.7
Engineering	11,200	11,800	105.4

Source: Partnership calculations based on Texas Workforce Commission data

Job growth has occurred throughout the region even though energy hiring remains sluggish. Since December '14, the region has created 183,800 jobs, according to the TWC. Five sectors account for 75 percent of those gains: professional and business services (37,200 jobs, comprising 20.2 percent of gains); health care and social assistance (35,700 jobs, 19.4 percent); food services and drinking places (34,300 jobs, 18.7 percent); local education (15,500 jobs, 8.4 percent); and construction (15,000 jobs, 8.2 percent).

Population growth has driven jobs growth in health care, food services, and local education. Pipelines, chemical plants, industrial construction, and housing are driving the need for more construction workers. Professional services is benefiting from the general increase in business activity. Population growth hasn't helped retail, though. The sector remains 7,200 jobs shy of where it was in December '14.

GLOBAL HOUSTON

The following article is extracted from *Global Houston 2019*, the Partnership's analysis of the region's ties to the world economy. The Partnership released the study June 13

at its annual Global Houston event. A full copy of the study can be found at www.houston.org.

This year's report explored three areas key to the region's growth—foreign trade, foreign direct investment and immigration. To better appreciate their importance to the region, consider the following:

- Houston has led the nation in metro exports nine out of the past 10 years. The region exports more oil field services, refined products, chemicals and fabricated metal products overseas than any other metro.
- More than 2,500 Houston manufacturing firms engage in global trade, sourcing materials from overseas, selling their products abroad, or both.
- 517 foreign-owned firms, either directly or through their subsidiaries, have announced investments in Houston over the past 10 years.
- Houston's foreign-born population grew by nearly 390,000 residents from '08 to '17, accounting for one-third of the region's population growth over the period.

Foreign Trade

Houston's exports have grown from \$80.0 billion in '08 to \$120.7 billion in '18, according to the U.S. International Trade Administration. ¹ No other metro area has experienced such growth over the period.

TOP U.S. EXPORTING METROS - '18

Metro	\$ Billions
Houston	120.7
New York	99.2
Los Angeles	64.8
Seattle	59.7
Chicago	47.3
Detroit	44.1
Dallas-Fort Worth	36.3
New Orleans	36.7
Miami	35.7
El Paso	30.1

Source: International Trade Administration

Houston has seen export tonnage soar in recent years, up nearly 50 percent since '08. Four commodities—crude, fuels, chemicals and plastics—account for the bulk of the gains. The growth is largely driven by supply, not demand.

Late in '15, Congress lifted the ban on crude exports, allowing U.S. producers to sell their output on world markets. Exports of crude have quadrupled since then.

The fracking boom has led to a surplus of propane and butane processed in Houston and shipped to markets abroad. Exports of the gases have more than doubled over the past five years.

The chemical plants and ethane crackers that broke ground during the height of the fracking boom are now online. Exports of chemicals and plastics are up 50 percent compared to five years ago.

Houston has also benefited from healthy overseas markets. Global growth has averaged 3.6 percent annually over the past 10 years.

Houston trades with more than 200 countries and territories. The volume exceeds \$1 billion or more with 42 of those nations and \$100 million or more with another 53. Our top partners, in order, are Mexico, China, Brazil, The Netherlands, South Korea, Germany, Japan, the United Kingdom, Italy and India.

Foreign Direct Investment

The Partnership has tracked 659 deals where foreign-owned companies announced plans to establish or expand operations in Houston. The value of the investments was made public for only 315 of these deals, but the cumulative amount disclosed is significant—\$33.2 billion. These investments originated from 36 countries and cover 63 industries across 11 broad sectors.

FOREIGN DIRECT INVESTMENTS IN HOUSTON

By Sector, January '08 - December '18

Industry	Investments
Manufacturing	257
Wholesale Trade/Distribution	80
Professional and Technical Services	77
Oil and Gas Extraction	72
Transportation and Warehousing	41
Real Estate Management	30
Construction	19
Retail Trade	17
Utilities	10
Finance and Insurance	9
Miscellaneous	47
Total	659

Source: Greater Houston Partnership, New Business Announcements database

Some foreign-owned companies investing in Houston are household names, like Ikea and Anheuser-Busch InBev. Others are less familiar but no less important, like INEOS

¹ Based on the Origin of Movement series, which differs from customs district traffic often reported here.

(chemicals and plastics) and Tenaris (oilfield pipe). The investments have been large and small, involved human capital and fixed assets, and expanded existing operations or represented new entries into the market.

Less than one-third of the investments (203 projects) came from companies that already had a presence in Houston. They wouldn't have expanded here if their initial foray into Houston hadn't been successful. But over half the announcements (352 projects) came from companies new to the U.S. or the Houston region.

Foreign investment is important to Houston for numerous reasons. It infuses new capital into the region, expands the manufacturing base, helps underpin jobs, facilitates the exchange of ideas and best practices, increases trade, adds to the tax base and stimulates growth.

Immigration

Nearly one in four Houstonians, over 1.6 million residents, was born outside the United States. Metro Houston has the fifth largest foreign-born population in the U.S. after New York, Los Angeles, Miami and Chicago

Immigration has contributed 390,000 new residents, about one-third of the region's population growth, since '08. International migration is more consistent than domestic migration. Houston recorded negative domestic migration twice in the past 10 years ('17 and '18). In contrast, international migration has remained positive over the past 20 years.

The Census Bureau estimates that there were just over 1.0 million foreign-born workers in Houston that year, about

30.8 percent of all employed workers in '17. Using data from the U.S. Census Bureau, the U.S. Bureau for Economic Analysis, and Texas Workforce Commission, the Partnership estimates that foreign-born workers contributed \$142.1 billion to Houston's GDP in '17. That's 29.0 percent of total GDP. Estimated contribution to Houston's GDP by foreign-born workers exceeds the GDP of Nashville (\$133.3 billion), San Antonio (\$129.3 billion) or Las Vegas (\$112.3 billion).

Conclusion

Houstonians shouldn't assume that trade, foreign investment and immigration will grow at the same pace over the next 10 years. All three face headwinds. Congress has yet to ratify the U.S.-Mexico-Canada Agreement that would establish new, formalized trade relations among the three countries. Washington and Beijing are currently engaged in a trade war. Concerns over global warming may curtail investments in traditional oil and gas, a Houston mainstay for more than a century. The Trump Administration continues to seek ways to restrict immigration. The Texas Legislature recently passed a law limiting container ship traffic in the Houston Ship Channel. And growth in global trade has begun to slow, from 5.6 percent in '17 to a projected 3.3 percent in '19.

Should Houstonians be concerned? Yes. Should we circle the wagons? No, that would be an overreaction. But anyone who lives, works or manages a business in Houston needs to appreciate how important trade, foreign investment and immigration are to the region.

Foreign-Born Workers Contribution to Metro Houston GDP in '17

Industry	GDP by Sector - \$ Millions	Avg. Annual Employment	GDP Per Employee	Foreign-Born Workers	Foreign-Born Contribution to GDP - \$ Millions
Mining	44,194	107,490	\$411,149	33,062	\$13,593
Construction	30,324	315,958	\$95,973	161,303	\$15,481
Manufacturing	82,578	315,958	\$261,357	101,190	\$26,447
Wholesale Trade	41,802	107,490	\$388,893	30,057	\$11,689
Retail Trade	24,558	348,531	\$70,460	88,166	\$6,212
Transportation, Warehousing, Information	36,440	201,952	\$180,441	57,107	\$10,305
Finance, Insurance, Real Estate	8,853	45,602	\$194,132	9,017	\$1,750
Professional & Business Services	66,760	198,695	\$335,990	42,079	\$14,138
Educational Services & Health Care	65,495	413,677	\$158,323	129,243	\$20,462
Leisure & Hospitality	26,783	388,029	\$69,023	162,305	\$11,203
Other Services	14,816	286,642	\$51,688	102,192	\$5,282
Government	9,642	175,894	\$54,819	74,139	\$4,064
Total or Average*	490,074	3,260,556	\$150,304	1,003,887	\$142,123

* Does not include contributions to GDP from the approximately 22,000 individuals employed in agriculture and private households

Sources: U.S. Bureau of Economic Analysis; U.S. Census Bureau; Texas Workforce Commission; calculations by Greater Houston Partnership

SNAPSHOT – KEY ECONOMIC INDICATORS



Aviation — The Houston Airport System (HAS) handled 59.4 million passengers in the 12 months ending May '19. That's another record for Houston and an 8.0 percent increase from the 55.0 million handled over the preceding 12 months. The 12-month international passenger volume totaled 11.9 million, up 4.9 percent from 11.3 million from the preceding 12 months. Domestic volume totaled 47.5 million, a 8.8 percent increase from 43.7 million for the same period in '18.



Building Permits — City of Houston building permits totaled \$909.1 million in May '19, up 81.8 percent from \$500.0 million in May '18, according to the latest data released by the city's Public Works Department. Commercial permit values increased 153.4 percent to \$563.9 million; residential permit values ticked up 24.4 percent to \$345.2 million.



Construction — Metro Houston's construction starts totaled \$19.6 billion in the 12 months ending May '19, up 9.8 percent from \$17.9 billion in '18, according to the latest data from Dodge Data & Analytics. Nonresidential activity surged 26.6 percent to \$9.8 billion, while residential activity decreased 2.9 percent to \$9.9 billion.



Crude Oil — The closing spot price for a barrel of West Texas Intermediate (WTI) averaged \$54.75 per barrel in the third week of June '19, down 17.3 percent from the same period last year, according to the U.S. Energy Information Administration (EIA). Year-to-date, WTI averaged \$57.19, a 12.2 percent decline from \$65.14 for the same span a year before. EIA has downgraded its WTI forecast to \$59.29 in '19.



Home Sales — Houston-area realtors sold 8,346 single-family homes in May, a 2.8 percent increase from last year, according to data from the Houston Association of Realtors. The single-family home median sales price increased 2.4 percent to \$249,993, a record high for the region.



Inflation — The energy index in the Houston Metro Area ticked down 0.5 percent, the shelter index increased 3.2 percent and grocery prices rose 3.2 percent from May '18 to May '19.



Natural Gas — Natural gas prices averaged \$2.40 per million British thermal units (MMBtu) in the third week of June '19, down 19.7 percent from \$2.99 for the same period in '18. EIA forecasts natural gas will average \$2.88 per MMBtu in '19.



Purchasing Managers Index — The Houston Purchasing Managers Index (PMI), a short-term leading indicator for regional production, registered 52.7 in May, down from 58.7 in April. Readings above 45 signal overall economic expansion in Houston over the next three to four months. Readings above 50 signal expansion in the manufacturing sector.



Rig Count — Baker Hughes reports 967 drilling rigs were working in the U.S. during the last week of June '19. That's down 80 rigs, or 7.6 percent, from the same week in June last year.



Vehicle Sales — Houston vehicle sales this May were up compared to May of last year. Dealers sold 25,381 new vehicles, a 7.0 percent jump from May '18, according to TexAuto Facts, published by InfoNation, Inc. of Sugar Land. Year-to-date vehicle sales ticked up 2.7 percent compared to the first five months of last year.

Patrick Jankowski, Elizabeth Balderrama, Josh Pherigo, Roel Martinez, Nadia Valliani and Melissa Verhoef contributed to this issue of Houston: The Economy at a Glance.

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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	Year	%	Most	Year	%
		Recent	Earlier	Change	Recent	Earlier	Change
ENERGY							
U.S. Active Rotary Rigs	June '19	967	1,052	-8.1	1,018 *	1,001 *	1.7
Spot Crude Oil Price (\$/bbl, West Texas Intermediate)	May '19	60.83	69.98	-13.1	57.83 *	64.98 *	-11.0
Spot Natural Gas (\$/MMBtu, Henry Hub)	May '19	2.64	2.80	-5.7	2.81 *	2.97 *	-5.4
UTILITIES AND PRODUCTION							
Houston Purchasing Managers Index	May '19	52.7	58.8	-10.4	57.5 *	56.5 *	1.8
Nonresidential Electric Current Sales (Mwh, CNP Service Area)	May '19	5,447,859	5,426,067	0.4	24,207,598	23,988,236	0.9
CONSTRUCTION							
Building Permits (\$, City of Houston)	May '19	909,075,252	499,987,082	81.8	3,580,279,810	2,258,741,107	58.5
Nonresidential	May '19	563,890,663	222,554,164	153.4	2,241,060,013	1,123,857,413	99.4
New Nonresidential	May '19	286,307,380	73,214,578	291.1	1,123,919,409	451,286,084	149.0
Nonresidential Additions/Alterations/Conversions	May '19	277,583,283	149,339,586	85.9	1,117,140,604	672,571,329	66.1
Residential	May '19	345,184,589	277,432,918	24.4	1,339,219,797	1,134,883,694	18.0
New Residential	May '19	265,404,649	236,739,207	12.1	1,134,130,234	917,565,848	23.6
Residential Additions/Alterations/Conversions	May '19	79,779,940	40,693,711	96.0	205,089,563	217,317,846	-5.6
Multiple Listing Service (MLS) Activity							
Property Sales	May '19	9,948	9,653	3.1	38,976	38,075	2.4
Median Sales Price - SF Detached	May '19	249,993	244,015	2.4	238,399 *	232,873 *	2.4
Active Listings	May '19	43,624	39,617	10.1	41,003 *	35,672 *	14.9
EMPLOYMENT (Houston-The Woodlands-Sugar Land MSA)							
Nonfarm Payroll Employment	May '19	3,163,600	3,083,800	2.6	3,132,000 *	3,054,060 *	2.6
Goods Producing (Natural Resources/Mining/Const/Mfg)	May '19	552,000	526,700	4.8	545,380 0	519,780 *	4.9
Service Providing	May '19	2,611,600	2,557,100	2.1	2,586,620 0	2,534,280 *	2.1
Unemployment Rate (%) - Not Seasonally Adjusted							
Houston-Sugar Land-Baytown MSA	May '19	3.2	4.1		3.8 #	4.5 *	
Texas	May '19	2.9	3.6		3.5 #	3.9 *	
U.S.	May '19	3.4	3.6		3.8 #	4.1 *	
TRANSPORTATION							
Port of Houston Authority Shipments (Short Tons)	Dec '18	3,680,232	3,634,228	1.3	46,678,510	44,135,139	5.8
Air Passengers (Houston Airport System)	May '19	5,191,462	4,957,782	4.7	24,196,488	23,000,758	5.2
Domestic Passengers	May '19	4,201,771	4,009,030	4.8	19,378,931	18,317,023	5.8
International Passengers	May '19	989,691	948,752	4.3	4,817,557	4,683,735	2.9
Air Freight (metric tons)	May '19	41,593	47,674	-12.8	207,617	211,603	-1.9
CONSUMERS							
New Car and Truck Sales (Units, Houston MSA)	May '19	25,381	23,720	7.0	126,873	123,576	2.7
Cars	May '19	7,141	7,213	-1.0	35,284	36,917	-4.4
Trucks, SUVs and Commercial	May '19	18,240	16,507	10.5	91,589	86,659	5.7
Total Retail Sales (\$000,000, Houston MSA, NAICS Basis)	Q4/18	36,017	37,083	-2.9	126,385	120,920	4.5
Consumer Price Index for All Urban Consumers ('82-'84=100)							
Houston-Galveston-Brazoria CMSA	Apr '19	229.261	225.116	1.8	227.695 *	224.419 *	1.5
United States	May '19	256.092	251.588	1.8	254.066 *	249.709 *	1.7
Hotel Performance (Houston MSA)							
Occupancy (%)	Q1/19	63.6	68.9		63.6 *	68.9 *	
Average Room Rate (\$)	Q1/19	106.68	110.25	-3.2	106.68 *	110.25 *	-3.2
Revenue Per Available Room (\$)	Q1/19	67.83	75.99	-10.7	67.83 *	75.99 *	-10.7
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)

	May '19	Apr '19	May '18	Change from		% Change from	
				Apr '19	May '18	Apr '19	May '18
Total Nonfarm Payroll Jobs	3,163.6	3,151.5	3,083.8	12.1	79.8	0.4	2.6
<i>Total Private</i>	<i>2,740.4</i>	<i>2,730.4</i>	<i>2,666.6</i>	<i>10.0</i>	<i>73.8</i>	<i>0.4</i>	<i>2.8</i>
<i>Goods Producing</i>	<i>552.0</i>	<i>549.5</i>	<i>526.7</i>	<i>2.5</i>	<i>25.3</i>	<i>0.5</i>	<i>4.8</i>
<i>Service Providing</i>	<i>2,611.6</i>	<i>2,602.0</i>	<i>2,557.1</i>	<i>9.6</i>	<i>54.5</i>	<i>0.4</i>	<i>2.1</i>
<i>Private Service Providing</i>	<i>2,188.4</i>	<i>2,180.9</i>	<i>2,139.9</i>	<i>7.5</i>	<i>48.5</i>	<i>0.3</i>	<i>2.3</i>
Mining and Logging	84.9	84.4	78.3	0.5	6.6	0.6	8.4
Oil & Gas Extraction	37.6	37.3	36.5	0.3	1.1	0.8	3.0
Support Activities for Mining	45.4	45.1	40.5	0.3	4.9	0.7	12.1
Construction	226.8	224.2	221.7	2.6	5.1	1.2	2.3
Manufacturing	240.3	240.9	226.7	-0.6	13.6	-0.2	6.0
Durable Goods Manufacturing	156.5	156.6	143.2	-0.1	13.3	-0.1	9.3
Nondurable Goods Manufacturing	83.8	84.3	83.5	-0.5	0.3	-0.6	0.4
Wholesale Trade	171.7	170.3	167.7	1.4	4.0	0.8	2.4
Retail Trade	300.1	300.8	306.2	-0.7	-6.1	-0.2	-2.0
Transportation, Warehousing and Utilities	150.6	151.2	146.5	-0.6	4.1	-0.4	2.8
Utilities	16.9	16.9	16.7	0.0	0.2	0.0	1.2
Air Transportation	20.0	19.8	20.1	0.2	-0.1	1.0	-0.5
Truck Transportation	28.8	28.5	27.0	0.3	1.8	1.1	6.7
Pipeline Transportation	10.9	11.0	11.3	-0.1	-0.4	-0.9	-3.5
Information	30.6	30.7	31.7	-0.1	-1.1	-0.3	-3.5
Telecommunications	13.0	13.1	13.5	-0.1	-0.5	-0.8	-3.7
Finance & Insurance	104.0	103.8	102.6	0.2	1.4	0.2	1.4
Real Estate & Rental and Leasing	60.3	60.3	61.4	0.0	-1.1	0.0	-1.8
Professional & Business Services	513.7	510.5	489.6	3.2	24.1	0.6	4.9
Professional, Scientific & Technical Services	243.5	241.9	225.5	1.6	18.0	0.7	8.0
Legal Services	26.3	26.1	25.7	0.2	0.6	0.8	2.3
Accounting, Tax Preparation, Bookkeeping	25.5	28.0	24.7	-2.5	0.8	-8.9	3.2
Architectural, Engineering & Related Services	76.7	74.6	68.0	2.1	8.7	2.8	12.8
Computer Systems Design & Related Services	34.6	34.4	32.5	0.2	2.1	0.6	6.5
Admin & Support/Waste Mgt & Remediation	223.3	221.7	217.1	1.6	6.2	0.7	2.9
Administrative & Support Services	211.2	209.4	206.1	1.8	5.1	0.9	2.5
Employment Services	78.4	78.8	80.8	-0.4	-2.4	-0.5	-3.0
Educational Services	62.4	62.5	60.9	-0.1	1.5	-0.2	2.5
Health Care & Social Assistance	340.8	341.7	331.7	-0.9	9.1	-0.3	2.7
Arts, Entertainment & Recreation	37.8	36.3	36.9	1.5	0.9	4.1	2.4
Accommodation & Food Services	297.3	295.8	292.4	1.5	4.9	0.5	1.7
Other Services	119.1	117.0	112.3	2.1	6.8	1.8	6.1
Government	423.2	421.1	417.2	2.1	6.0	0.5	1.4
Federal Government	29.7	29.5	28.8	0.2	0.9	0.7	3.1
State Government	87.7	87.8	86.4	-0.1	1.3	-0.1	1.5
State Government Educational Services	51.5	51.8	51.5	-0.3	0.0	-0.6	0.0
Local Government	305.8	303.8	302.0	2.0	3.8	0.7	1.3
Local Government Educational Services	214.4	213.4	211.0	1.0	3.4	0.5	1.6

SOURCE: Texas Workforce Commission