

# THE ECONOMY AT A GLANCE

## HOUSTON



GREATER HOUSTON  
PARTNERSHIP.  
Making Houston Greater.

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- The region’s leading exports in ‘17 were petroleum products (\$18.2 billion), basic chemicals (\$12.9 billion), oil and gas extraction (\$11.5 billion), agricultural, construction and mining machinery (\$3.5 billion) and plastics and resins (\$3.4 billion).
- Exports supported 330,340 Houston jobs in ‘17, or 10.9 percent of total employment. That’s up from 169,460 jobs in ‘03, or 7.4 percent of total employment.<sup>1</sup>
- Among the nation’s 100 largest metro areas, Houston ranked third in exports, third in rate of export growth, fourth in exports’ share of GDP and fifth in export-supported jobs in ‘17.

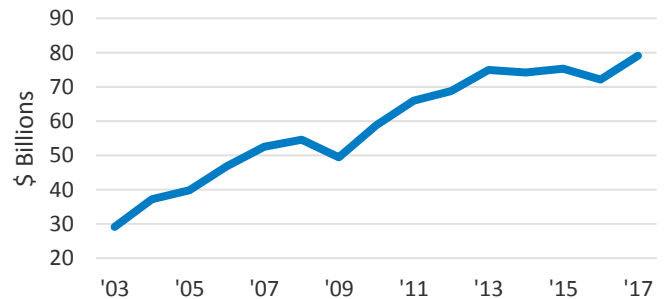
### ‘17 EXPORTS DRIVING GROWTH

Houston has found a new engine for growth—exports. They have grown faster than the economy in general, and their share of local employment and gross domestic product has nearly doubled since ‘03.

The conclusions come from the Partnership’s review of data in The Brookings Institution’s *2018 Export Monitor*. Brookings and JP Morgan Chase generate the data each year as part of their Global Cities Initiative, a program to boost exports in the nation’s metro areas. The *Export Monitor* provides data on the 100 largest U.S. metros and the export industries in each. Local highlights:

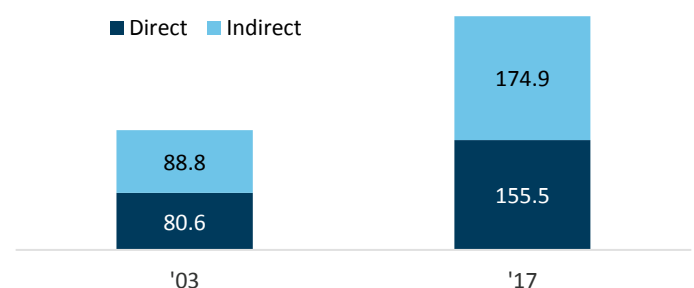
- Houston exports totaled \$79.1 billion in ‘17, up from \$29.1 billion (adjusted for inflation) in ‘03.
- From ‘03 to ‘17, Houston exports grew at an annualized rate of 7.3 percent (adjusted for inflation). That’s nearly three times the pace of real GDP growth (2.9 percent annually) over the same period.
- Exports accounted for 17.3 percent of metro Houston’s GDP in ‘17, up from 8.9 percent in ‘03.

### Metro Houston Exports



Source: The Brookings Institution

### Local Jobs Supported by Exports (000s)



Source: The Brookings Institution

<sup>1</sup> Total in ‘17 includes 155,450 direct and 174,890 indirect. Total in ‘03 includes 80,630 direct and 88,830 indirect.

The surge in Houston exports has coincided with healthy economic growth among some of Houston's major trading partners. China joined the World Trade Organization in '01, kicking off that nation's explosive growth. The emerging markets of Brazil, India, Indonesia, Malaysia, Mexico, Philippines, Thailand, South Africa and Turkey began to grow dramatically in the early '00s. Houston has enjoyed a flurry of investment activity by foreign-owned firms over the past 10 years. Trade growth has encouraged foreign-owned firms to invest in Houston, leading in turn to further increases in foreign trade. Houston has been a magnet for foreign migration over the past decade and a half. A large foreign-born population has helped facilitate trade between Houston and communities abroad.

## GLOBAL RISKS TO HOUSTON'S GROWTH

This buildup of Houston's export sectors has made the region less dependent on oil but more vulnerable to shocks in the global economy. Any number of events—a trade war, a dramatic decline in immigration, a collapse in overseas financial markets—would dramatically impact Houston. To paraphrase a familiar slogan, "What happens overseas doesn't stay overseas." It will eventually land on U.S. shores.

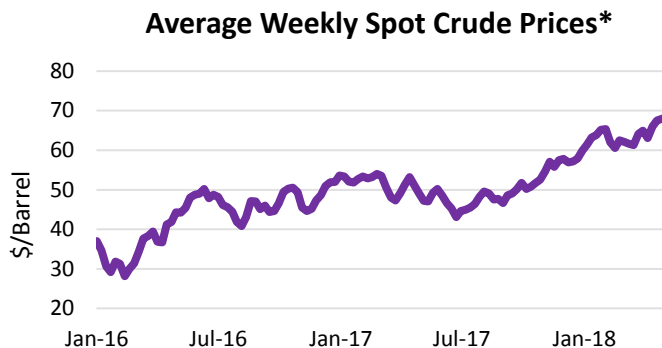
On Friday, May 18, the Partnership will address some of the risks to Houston's growth at its fifth annual *Global Houston Outlook*. Keynoting the event will be Scott Kirby, president of United Airlines. He will explain the challenges of operating an airline that serves five continents from Houston. Patrick Jankowski, senior vice president of Research at the Greater Houston Partnership, will outline global events that pose the greatest risk to Houston's growth.

The Partnership's *Global Outlook* event will be held at the Hyatt Regency Downtown, beginning with networking and a trade expo at 10:30 a.m. followed by lunch at noon with presentations by Jankowski and Kirby. Attendees will also receive a copy of *Global Houston*, which includes profiles of Houston's trade ties with various countries. For additional information about the event, visit the Partnership's website or click [here](#).



## WELCOME \$70 OIL

U.S. crude prices topped \$70 per barrel in early May, a level not seen since late November '14. A host of factors have contributed to the rise.



Source: US E.I.A.

\* West Texas Intermediate

*The U.S. economy continues to grow.* April marked the 97<sup>th</sup> consecutive month of net U.S. job gains. Gross domestic product (GDP) has grown in 33 of the past 36 quarters. The U.S. unemployment rate, 3.9 percent in April, is below the level many economists consider to be full employment.

*The global economy continues to expand.* The International Monetary Fund reports global growth hit 3.0 percent in '17, up from 2.4 percent in '16, and is expected to average 3.1 percent this year. The Economist Intelligence Unit forecasts global trade in goods and commodities to grow 4.6 percent this year and 4.0 percent the next.

*Global oil consumption continues to set records.* Demand topped 96.2 million barrels per day (b/d) in '16, 97.8 million b/d in '17, and is projected to top 100 million b/d by the end of '18.

*OPEC and its allies have complied with the terms of their agreement to limit crude production.* The first agreement—reached in November '16, then renewed in November '17—has kept more than 1.8 million barrels of daily production off the market. The group will meet again in June to reassess the agreement.

*President Trump threatened to withdraw the U.S. from the Iran nuclear accords.* Reimposing sanctions could remove 0.5 to 1.0 million barrels of daily crude production from global markets. In the two months leading up to the announcement, commodity traders bid up the price of crude by \$10 per barrel. The day after the announcement, the price was essentially unchanged.

*Crude inventories continues to dwindle.* Since January '17, global inventories have declined by an average of 0.5 million barrels per day. The U.S. Energy Information Administration (EIA) estimates OECD inventories exceeded

3.1 billion barrels in Q1/17. By Q1/18, OECD inventories had fallen to 2.8 billion barrels.<sup>2</sup>

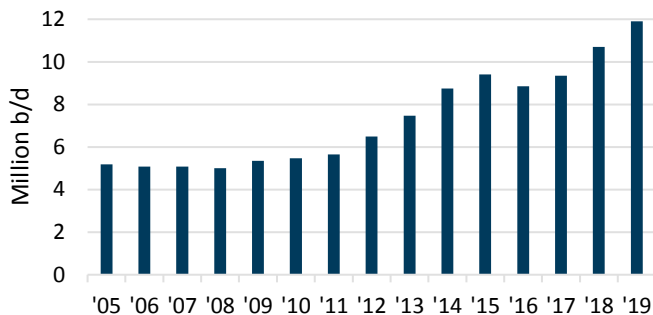
*Venezuela's production continues to decline.* The International Energy Agency (IEA) projects the country's crude output will tumble to 1.38 million b/d by the end of the year, the lowest level in 70 years.

*Geopolitical conflicts have added an uncertainty premium to crude prices.* Traders worry that unrest in Libya and Nigeria could disrupt global supplies and that the civil war in Syria could spread beyond its borders.

The jump in prices has spurred U.S. drilling activity. The U.S. drilling fleet has added 92 oil rigs since so far this year. Through April of this year, well starts are up 40.2 percent over the comparable period in '17. Permits to drill are up 45.9 percent through April. And over the past 12 months, the industry has added 1.1 million b/d to U.S. production.

Higher oil prices have not led to a surge in local hiring. The industry has added only 10,300 jobs in Houston since December '16, far short of the 86,400 lost in the downturn.

**U.S. Crude Production, Daily Average**



Source: U.S. E.I.A.

EIA projects that U.S. output will average 10.7 million b/d in '18, up from 9.4 million b/d in '17. As recently as '08, domestic output was less than 5.0 million b/d.

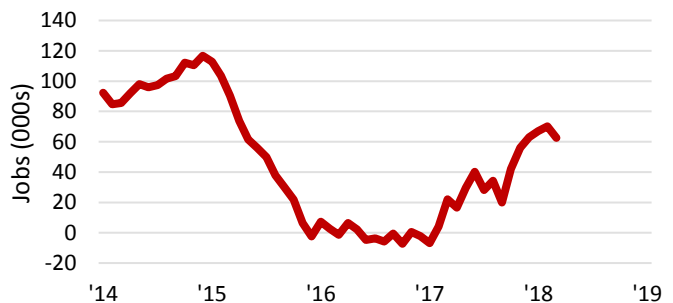
Production in the Permian Basin, the focus of the current boom, has grown so fast that some drillers can ship their crude to refineries and export terminals only via trucks and rail cars. EIA expects pipeline constraints to ease by the end of next year as additional capacity comes on line.

## HARVEY IMPACT BEGINS TO FADE

Metro Houston<sup>3</sup> created 10,500 jobs in March. That's below the long-term average of 12,800 for the month. Factor out recession years, and the long-term average jumps to 14,900.

For the 12 months ending March '18, the region created 62,500 jobs, a dip from the 70,100 created in the 12 months ending February '18. The data suggest that

**Net Job Change, 12-Month Total**



Source: Texas Workforce Commission

Houston's 12-month growth peaked in February and has begun to trend down.

The shift in job growth was expected. Houston typically receives a short-term economic boost immediately after a major hurricane. Repair work jolts construction activity, the need to replace damaged household goods lifts retail sales, displaced residents dine out because they can't eat at home, and companies bring on temporary workers to handle specific recovery needs.

Typically, a post-hurricane stimulus lasts half a year, then begins to wind down. Hurricane Harvey made landfall in late August and six months had elapsed in February. As repairs are completed and families return home, demand for labor tied to Harvey recovery efforts will taper off. Without a surge in hiring elsewhere, the 12-month job total should continue to slip.

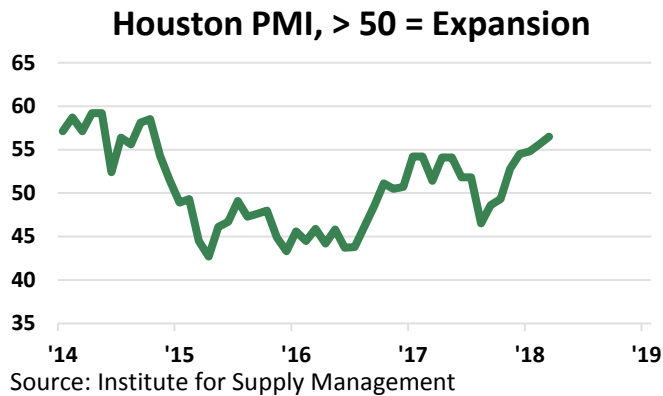
A few metrics indicating possible growth not associated with Harvey:

The North American drilling fleet broke the 1,000-rig mark in early April. TWC already reports year-to-date job growth in the manufacturing of oil field equipment and fabricated metal products.

<sup>2</sup> The Organisation for Economic Co-operation and Development (OECD) represents 35 nations, including all the world's advanced economies.

<sup>3</sup> Metro Houston includes Austin, Brazoria, Chambers, Fort Bend, Galveston, Harris, Liberty, Montgomery and Waller counties.

The Houston Purchasing Manager's index, a leading indicator for regional growth, registered 56.6 in April. Readings above 50 indicate expansion over the next three to four months. The PMI slipped below 50 in the three months immediately after Harvey. The PMI is now at its highest level since October '14.



The U.S. economy continues to grow at a healthy pace. The U.S. Bureau of Economic Analysis reports that over the past four quarters U.S. GDP growth has averaged 2.9 percent.

However, the ongoing trade dispute with China, and possible spillover into relations with other countries, would hurt sectors of Houston's economy tied to global trade. The impact would likely be felt later this year.

The Partnership's employment forecast, based on the assumption that crude would average \$50 per barrel in '18, calls for the region to create 45,500 jobs this year. The U.S. E.I.A. forecasts West Texas Intermediate (WT), the U.S. benchmark for light, sweet crude, to average \$65.58 through the remainder of the year. If that forecast hold true, growth will be more robust later this year and jobs gains will be stronger than the Partnership initially projected.

## COMMERCIAL REAL ESTATE UPDATE

The market for Houston retail and industrial space remains healthy, the apartment market has marginally improved, and the office market continues to struggle.

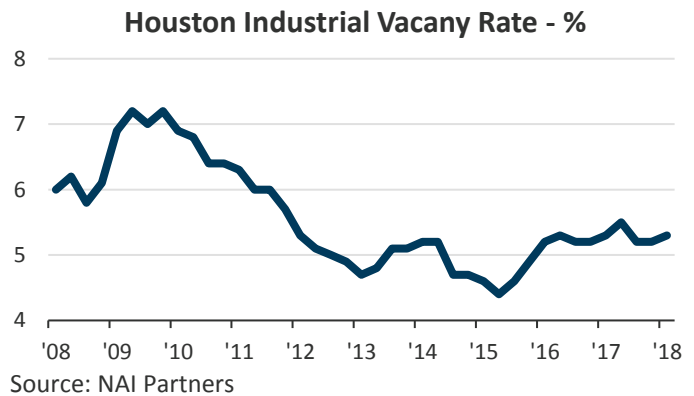
Colliers reports Houston's overall retail vacancy was 5.6 percent in Q1/18, up slightly from 5.4 percent in Q4/17. The market absorbed 740,000 square feet, a significant increase from the 88,000 absorbed the previous quarter. Another 2.6 million square feet was under construction. Shoppers are increasingly using online stores to research a product before going to the store to make a purchase and conversely visiting showrooms to try out products before buying online.

JLL reports the overall office vacancy rate was 23.8 percent in Q1/18, up from 19.3 percent in Q1/17. In '13, at the height of the recent boom, Houston's vacancy rate was 12.3 percent.

Net office absorption was -1.3 million square feet in Q1/18 with another 1.7 million under construction. After rising steadily over the past three years, concessions such as free rent and generous tenant improvement allowances have begun to plateau, but remain at elevated levels. Market conditions will favor tenants over landlords until the excess inventory is drawn down. That's unlikely to occur within the next two years.

NAI Partners reports Houston's industrial vacancy rate was 5.3 percent in Q1/18, jumping to 8.8 percent when sublease space is included. That compares to 5.0 percent and 9.1 percent respectively in Q1/17.

Net industrial absorption was 1.6 million square feet in Q1/18, with another 8.8 million square feet under construction. Growth in ecommerce and traffic at the Port of Houston continues to drive demand for industrial and warehouse space.



CBRE reports the multifamily occupancy rate was 89.7 percent in Q1/18, up from 88.3 percent in Q1/17. Average rental rates were little changed over the year, \$1.16 per square foot (psf) in Q1/18 vs. \$1.11 psf in Q1/17, an increase which is less than the rate of inflation.

Houston absorbed 2,956 apartment units in Q1/18 at the end of which 10,958 were under construction. Developers have proposed another 17,130 for the region. The industry rule of thumb is that for every six jobs created, Houston absorbs one apartment. That suggests Houston needs to create 66,000 jobs to absorb units currently under construction and 103,000 to absorb all the proposed units.



## SNAPSHOT — KEY ECONOMIC INDICATORS



**Aviation** — The Houston Airport System handled 54.4 million passengers in the 12 months ending March '18, down 0.1 percent from the 54.4 million handled during the same period in '17. International passenger volume totaled 11.2 million, down 2.8 percent from 11.5 million the previous year. Domestic volume totaled 43.2 million, a slight increase from 42.9 million in March '17.



**Building Permits** — For the 12 months ending March '18, city building permits totaled \$5.9 billion, down 9.7 percent from \$6.5 billion in the 12 months ending March '17. Commercial permit values fell 23.8 percent to \$3.4 billion while residential permit values rose 21.1 percent to \$2.5 billion.



**Business-Cycle Index** — Coincident and leading indicators continue to suggest healthy growth in activity in the region. Exports are expanding, while real estate and construction data are mixed. The existing-home market remains tight and construction employment has been boosted by post-Hurricane Harvey demand, but office vacancy rates have risen.



**Construction** — Through the first three months of '18, starts totaled \$4.3 billion, down 14.1 percent from \$5.0 billion for the corresponding period in '17. The 12-month total peaked at \$30.9 billion in February '15, the height of the chemical plant construction boom, and has trended downward since.



**Crude Oil** — West Texas Intermediate, the U.S. benchmark for light, sweet crude, traded between \$62.03 and \$68.56 a barrel in April '18 versus \$48.90 to \$53.38 per barrel in April '17. The U.S. Energy Information Administration forecasts WTI to average \$65.58 this year and \$60.86 next year.



**Home Sales** — Houston's residential real estate market rebounded from a sluggish March. Single-family home sales, average price paid and pending sales rose both month-to-month and year-to-year. Total sales volume topped \$26.6 billion in the 12 months ending April '18, a record for the region.

Foreclosure sales continue to trend downward and now account for less than 2.0 percent of all transactions.



**Inflation** — Consumer prices in the Houston-The Woodlands- Sugar Land metro area grew 2.4 percent from April '17 to April '18. In the 12 months ending April '18, the energy index rose 9.5 percent. Food prices rose 1.3 percent during the previous 12 months.



**Natural Gas** — The spot price for Henry Hub natural gas averaged \$2.80 per million BTUs in April, down 6.6 percent from the average of \$3.10 in April '17. EIA forecasts the Henry Hub spot price to average \$3.01 this year and \$3.11 in '19.



**Rig Count** — Baker Hughes reports 1,021 drilling rigs were working in the U.S. during the last week of April. That's up 151 rigs, or 17.4 percent, from the 824 the same week in April last year. The rig count has trended upward since early November.



**Trade** — Through March of this year, \$52.6 billion in goods and commodities passed through the Houston/Galveston Customs District, up 12.9 percent from \$46.6 billion over the same period in '17. Exports totaled \$31.4 billion, up 17.7 percent. Imports totaled \$21.3 billion, up 6.6 percent.



**Vehicle Sales** For the 12 months ending March '18, Houston-area dealers sold 293,294 vehicles, up 1.8 percent from the 288,094 sold during the corresponding period in '17. InfoNation forecasts 306,000 new vehicle sales in '18, a 5.4 percent increase from the 290,354 sold in '17.

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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, please 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
<b>ENERGY</b>							
U.S. Active Rotary Rigs	Apr '18	991	789	25.6	966 *	742 *	30.2
Spot Crude Oil Price (\$/bbl, West Texas Intermediate)	Apr '18	66.25	51.06	29.7	63.76 *	51.48 *	23.9
Spot Natural Gas (\$/MMBtu, Henry Hub)	Apr '18	2.69	2.88	-6.6	3.00 *	3.04 *	-1.3
<b>UTILITIES AND PRODUCTION</b>							
Houston Purchasing Managers Index	Apr '18	56.6	56.5	0.2	55.9 *	53.5 *	4.5
Nonresidential Electric Current Sales (Mwh, CNP Service Area)	Feb '18	4,356,484	4,187,018	4.0	8,973,977	8,800,876	2.0
<b>CONSTRUCTION</b>							
<b>Building Permits (\$, City of Houston)</b>	<b>Mar '18</b>	<b>509,064,058</b>	<b>471,109,441</b>	<b>8.1</b>	<b>1,290,597,207</b>	<b>1,496,054,192</b>	<b>-13.7</b>
Nonresidential	Mar '18	319,632,913	304,243,079	5.1	710,502,618	1,005,114,349	-29.3
New Nonresidential	Mar '18	205,573,381	82,651,494	148.7	321,067,651	359,461,413	-10.7
Nonresidential Additions/Alterations/Conversions	Mar '18	114,059,532	221,591,585	-48.5	389,434,967	645,652,936	-39.7
Residential	Mar '18	189,431,145	166,866,362	13.5	580,094,589	490,939,843	18.2
New Residential	Mar '18	151,725,009	140,319,906	8.1	443,964,843	422,304,945	5.1
Residential Additions/Alterations/Conversions	Mar '18	37,706,136	26,546,456	42.0	136,129,746	68,634,898	98.3
<b>Multiple Listing Service (MLS) Activity</b>							
Property Sales	Apr '18	8,453	8,045	5.1	28,570	27,728	3.0
Median Sales Price - SF Detached	Apr '18	240,000	228,000	5.3	229,588 0	222,250 *	3.3
Active Listings	Apr '18	36,882	38,345	-3.8	34,976 *	36,612 *	-4.5
<b>EMPLOYMENT (Houston-The Woodlands-Sugar Land MSA)</b>							
<b>Nonfarm Payroll Employment</b>	<b>Mar '18</b>	<b>3,072,000</b>	<b>3,009,500</b>	<b>2.1</b>	<b>3,055,200 *</b>	<b>2,988,667 *</b>	<b>2.2</b>
Goods Producing (Natural Resources/Mining/Const/Mfg)	Mar '18	527,500	512,000	3.0	524,867 0	508,133 *	3.3
Service Providing	Mar '18	2,544,500	2,497,500	1.9	2,530,333 0	2,480,533 *	2.0
<b>Unemployment Rate (%) - Not Seasonally Adjusted</b>							
Houston-Sugar Land-Baytown MSA	Mar '18	4.6	5.2		4.7 *	5.5 *	
Texas	Mar '18	4.1	4.5		4.1 *	4.8 *	
U.S.	Mar '18	4.1	4.6		4.3 *	4.9 *	
<b>TRANSPORTATION</b>							
<b>Port of Houston Authority Shipments (Short Tons)</b>	<b>Mar '18</b>	<b>4,007,711</b>	<b>4,240,660</b>	<b>-5.5</b>	<b>11,025,502</b>	<b>11,203,051</b>	<b>-1.6</b>
<b>Air Passengers (Houston Airport System)</b>	<b>Mar '18</b>	<b>4,935,456</b>	<b>4,692,517</b>	<b>5.2</b>	<b>13,312,917</b>	<b>12,937,463</b>	<b>2.9</b>
Domestic Passengers	Mar '18	3,899,763	3,731,091	4.5	10,516,167	10,229,589	2.8
International Passengers	Mar '18	1,035,693	961,426	7.7	2,796,750	2,707,874	3.3
<b>Air Freight (metric tons)</b>	<b>Mar '18</b>	<b>43,907</b>	<b>37,796</b>	<b>16.2</b>	<b>120,465</b>	<b>106,176</b>	<b>13.5</b>
<b>CONSUMERS</b>							
<b>New Car and Truck Sales (Units, Houston MSA)</b>	<b>Mar '18</b>	<b>22,278</b>	<b>20,934</b>	<b>6.4</b>	<b>72,876</b>	<b>69,936</b>	<b>4.2</b>
Cars	Mar '18	6,676	7,132	-6.4	21,210	23,813	-10.9
Trucks, SUVs and Commercial	Mar '18	15,602	13,802	13.0	51,666	46,123	12.0
<b>Total Retail Sales (\$000,000, Houston MSA, NAICS Basis)</b>	<b>Q3/17</b>	<b>28,181</b>	<b>28,049</b>	<b>0.5</b>	<b>85,311</b>	<b>81,914</b>	<b>4.1</b>
<b>Consumer Price Index for All Urban Consumers ('82-'84=100)</b>							
Houston-Galveston-Brazoria CMSA	Apr '18	225.1	219.9	2.4	224.400 *	219.200 *	2.4
United States	Apr '18	250.5	244.5	2.5	249.200 *	243.700 *	2.3
<b>Hotel Performance (Houston MSA)</b>							
Occupancy (%)	Q4/17	72.5	57.2		66.7 *	62.3 *	
Average Room Rate (\$)	Q4/17	110.06	99.03	11.1	107.96 *	104.67 *	3.1
Revenue Per Available Room (\$)	Q4/17	79.82	56.66	40.9	71.96 *	65.20 *	10.4

### 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)

	Mar '18	Feb '18	Mar '17	Change from		% Change from	
				Feb '18	Mar '17	Feb '18	Mar '17
<b>Total Nonfarm Payroll Jobs</b>	<b>3,072.0</b>	<b>3,061.5</b>	<b>3,009.5</b>	<b>10.5</b>	<b>62.5</b>	<b>0.3</b>	<b>2.1</b>
<i>Total Private</i>	<i>2,656.9</i>	<i>2,647.2</i>	<i>2,595.7</i>	<i>9.7</i>	<i>61.2</i>	<i>0.4</i>	<i>2.4</i>
<i>Goods Producing</i>	<i>527.5</i>	<i>527.4</i>	<i>512.0</i>	<i>0.1</i>	<i>15.5</i>	<i>0.0</i>	<i>3.0</i>
<i>Service Providing</i>	<i>2,544.5</i>	<i>2,534.1</i>	<i>2,497.5</i>	<i>10.4</i>	<i>47.0</i>	<i>0.4</i>	<i>1.9</i>
<i>Private Service Providing</i>	<i>2,129.4</i>	<i>2,119.8</i>	<i>2,083.7</i>	<i>9.6</i>	<i>45.7</i>	<i>0.5</i>	<i>2.2</i>
Mining and Logging	77.8	78.5	76.7	-0.7	1.1	-0.9	1.4
Oil & Gas Extraction	36.0	36.4	38.0	-0.4	-2.0	-1.1	-5.3
Support Activities for Mining	40.5	40.3	37.4	0.2	3.1	0.5	8.3
Construction	227.1	226.2	216.4	0.9	10.7	0.4	4.9
Manufacturing	222.6	222.7	218.9	-0.1	3.7	0.0	1.7
Durable Goods Manufacturing	141.3	140.6	136.1	0.7	5.2	0.5	3.8
Nondurable Goods Manufacturing	81.3	82.1	82.8	-0.8	-1.5	-1.0	-1.8
Wholesale Trade	168.1	167.0	163.4	1.1	4.7	0.7	2.9
Retail Trade	312.4	313.5	306.0	-1.1	6.4	-0.4	2.1
Transportation, Warehousing and Utilities	142.8	143.1	140.6	-0.3	2.2	-0.2	1.6
Utilities	16.4	16.4	16.2	0.0	0.2	0.0	1.2
Air Transportation	21.1	21.1	21.6	0.0	-0.5	0.0	-2.3
Truck Transportation	25.4	25.3	24.9	0.1	0.5	0.4	2.0
Pipeline Transportation	11.9	11.7	11.9	0.2	0.0	1.7	0.0
Information	31.4	31.7	32.5	-0.3	-1.1	-0.9	-3.4
Telecommunications	13.6	13.7	13.9	-0.1	-0.3	-0.7	-2.2
Finance & Insurance	100.9	100.4	100.5	0.5	0.4	0.5	0.4
Real Estate & Rental and Leasing	60.5	60.9	57.2	-0.4	3.3	-0.7	5.8
Professional & Business Services	501.6	496.0	475.6	5.6	26.0	1.1	5.5
Professional, Scientific & Technical Services	232.9	233.3	221.8	-0.4	11.1	-0.2	5.0
<i>Legal Services</i>	<i>25.6</i>	<i>25.6</i>	<i>24.9</i>	<i>0.0</i>	<i>0.7</i>	<i>0.0</i>	<i>2.8</i>
<i>Accounting, Tax Preparation, Bookkeeping</i>	<i>28.6</i>	<i>28.8</i>	<i>29.3</i>	<i>-0.2</i>	<i>-0.7</i>	<i>-0.7</i>	<i>-2.4</i>
<i>Architectural, Engineering &amp; Related Services</i>	<i>66.7</i>	<i>66.1</i>	<i>65.7</i>	<i>0.6</i>	<i>1.0</i>	<i>0.9</i>	<i>1.5</i>
<i>Computer Systems Design &amp; Related Services</i>	<i>32.2</i>	<i>32.6</i>	<i>31.1</i>	<i>-0.4</i>	<i>1.1</i>	<i>-1.2</i>	<i>3.5</i>
Admin & Support/Waste Mgt & Remediation	226.5	220.4	211.9	6.1	14.6	2.8	6.9
<i>Administrative &amp; Support Services</i>	<i>215.7</i>	<i>208.6</i>	<i>200.0</i>	<i>7.1</i>	<i>15.7</i>	<i>3.4</i>	<i>7.8</i>
<i>Employment Services</i>	<i>95.4</i>	<i>88.8</i>	<i>79.3</i>	<i>6.6</i>	<i>16.1</i>	<i>7.4</i>	<i>20.3</i>
Educational Services	60.2	60.4	59.5	-0.2	0.7	-0.3	1.2
Health Care & Social Assistance	325.1	324.6	323.9	0.5	1.2	0.2	0.4
Arts, Entertainment & Recreation	33.3	31.9	33.7	1.4	-0.4	4.4	-1.2
Accommodation & Food Services	283.4	282.1	281.8	1.3	1.6	0.5	0.6
Other Services	109.7	108.2	109.0	1.5	0.7	1.4	0.6
Government	415.1	414.3	413.8	0.8	1.3	0.2	0.3
Federal Government	29.0	29.1	28.7	-0.1	0.3	-0.3	1.0
State Government	86.4	86.5	85.3	-0.1	1.1	-0.1	1.3
<i>State Government Educational Services</i>	<i>51.3</i>	<i>51.3</i>	<i>50.9</i>	<i>0.0</i>	<i>0.4</i>	<i>0.0</i>	<i>0.8</i>
Local Government	299.7	298.7	299.8	1.0	-0.1	0.3	0.0
<i>Local Government Educational Services</i>	<i>212.7</i>	<i>211.5</i>	<i>211.1</i>	<i>1.2</i>	<i>1.6</i>	<i>0.6</i>	<i>0.8</i>

SOURCE: Texas Workforce Commission