

Houston Area Employment Situation

April 2025

CURRENT EMPLOYMENT AND LOCAL AREA UNEMPLOYMENT STATISTICS

Houston Jobs Up in April, Reversing Early-Year Slowdown

Total Nonfarm

Over-the-month Change

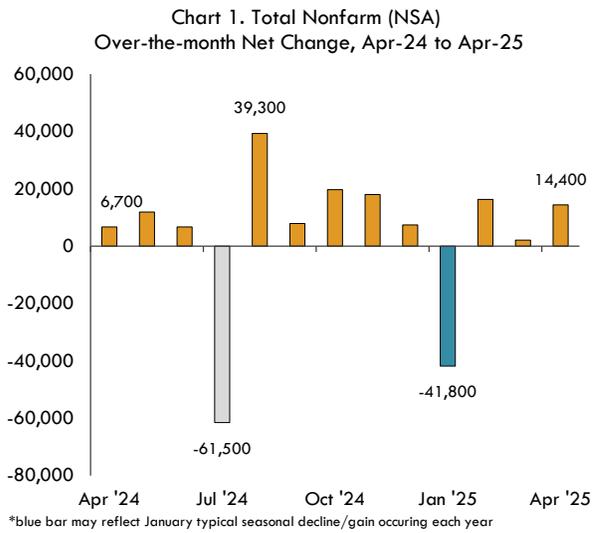
Houston MSA Total Nonfarm employment stood at 3,470,200 in April, up 14,400 jobs over the month, or 0.4 percent on a not-seasonally-adjusted basis (see Chart 1). A year ago Houston registered an over-the-month increase of 6,700 jobs. Prior to the pandemic, historically in the month of April, Total Nonfarm has on average added 7,400 jobs over the month, which indicates that this month's gains are substantially above the long-term average.

The primary drivers of this April's growth were increases in Professional and Business Services; Leisure and Hospitality; and Private Education and Health Services. Gains were also recorded in Trade, Transportation, and Utilities; Manufacturing; and Mining and Logging. The net increase in jobs over the month was partially offset by losses in Other Services, and Information (see Chart 2). Houston MSA Total Nonfarm (seasonally adjusted) employment stood at 3,474,200, up 2,800 jobs over the month, or 0.1 percent vs. a historical average of 4,000. All analysis pertains to not-seasonally adjusted data unless otherwise noted. Data source: BLS/TWC. NOTE: The Houston-Woodlands-Sugar Land, TX Metropolitan Statistical Area (MSA) consists of Austin, Brazoria, Chambers, Fort Bend, Galveston, Harris, Liberty, Montgomery, and Waller Counties. Analysis of major sectors and their sub-components throughout the remainder of this report references not-seasonally adjusted data. All data provided by BLS/TWC unless otherwise noted.

- Top-3 Drivers of Over-the-month Job Growth in April**
- Professional and Business Services: 5,600
 - Leisure and Hospitality: 3,900
 - Private Education and Health Services: 1,800

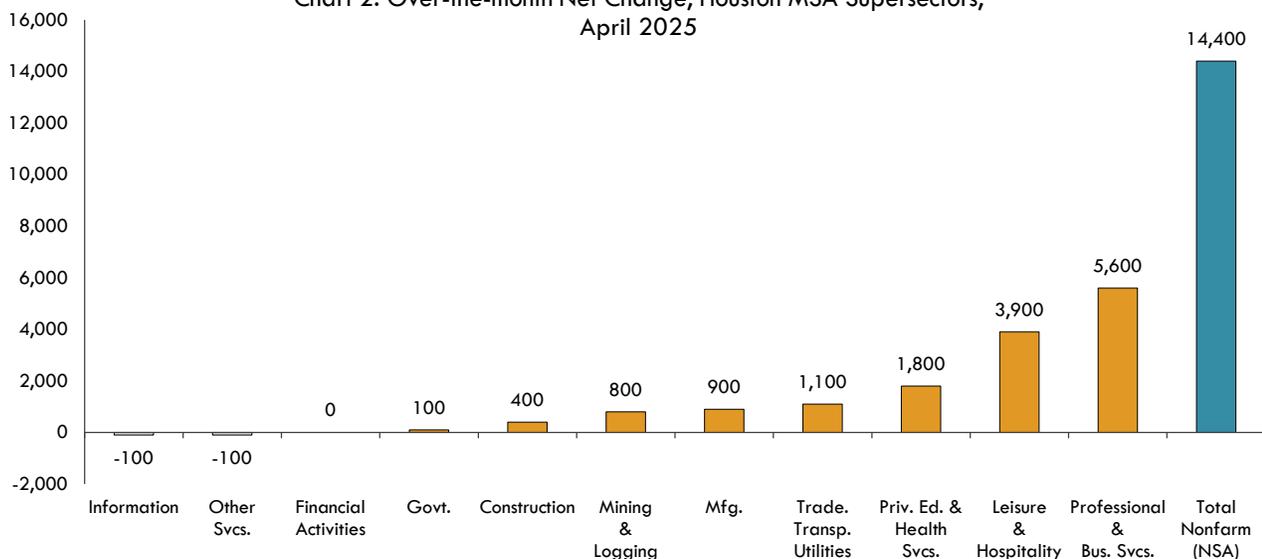
Over-the-year Change

Over the year, Total Nonfarm employment was up 40,400 or 1.2 percent on a not-seasonally-adjusted basis and up 43,100 or 1.3 percent on a seasonally-adjusted basis (see NSA Chart 3). To compare, April 2024 saw a year-over-year gain of 61,700 jobs (NSA) from April 2023. Currently 10 out of 11 sectors show growth year over year of which the top-three are Trade, Transportation, and Utilities (10,400); Private Education and Health Services (10,000); and Government (6,300) (see Chart 4).



Total Nonfarm employment not-seasonally-adjusted now exceeds its February 2020 pre-pandemic level of 3,193,600 jobs by 276,600, or 8.7 percent (274,400 jobs, 8.6 percent above 3,199,800 seasonally adjusted).

Chart 2. Over-the-month Net Change, Houston MSA Supersectors, April 2025



Houston Area Employment Situation

April 2025

Previous Month's Revisions

Total Nonfarm employment was revised downward by -3,600 jobs for a February to March smaller net gain of 2,100 compared to an original estimate of 5,700 jobs. A downward revision of -1,500 jobs in Government was the largest contributor followed by Construction (-1,200) and Manufacturing (-1,100). Upward revisions in Private Education and Health Services (+500), Professional and Business Services (+300), and Mining and Logging (+300) provided a partial offset of the overall downward revision to Total Nonfarm employment (see Chart 5).

Top-3 Drivers of Over-the-year Job Growth in April

- Trade, Transportation, and Utilities: 10,400
- Private Education and Health Services: 10,000
- Government: 6,300

Chart 5. Net Revisions for Selected Supersectors and Major Industries, March 2025

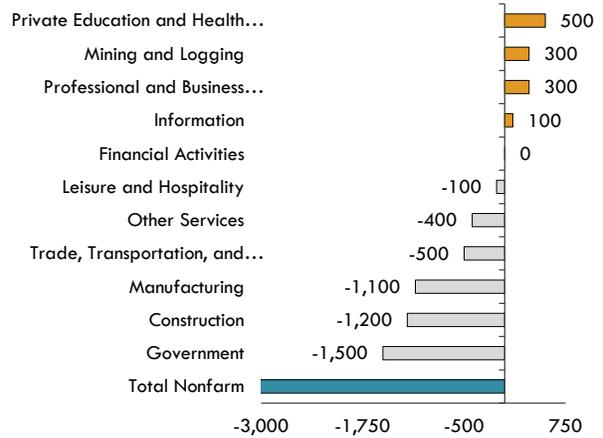


Chart 3. Total Nonfarm (NSA)
Over-the-year Net Change, Apr-10 to Apr-25

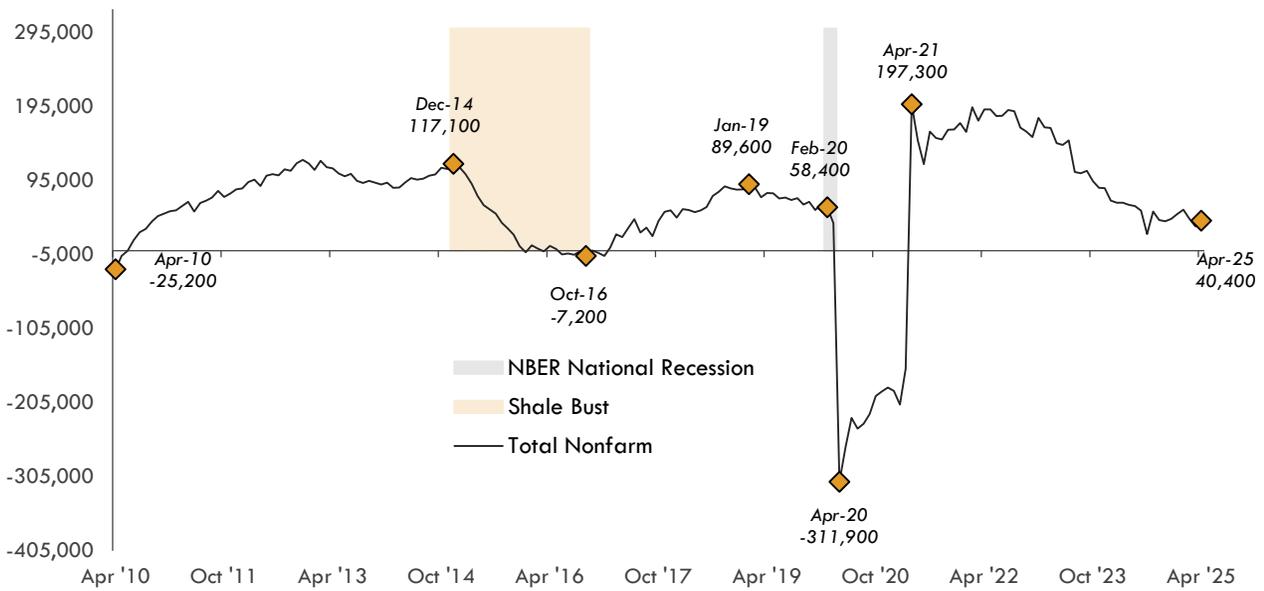
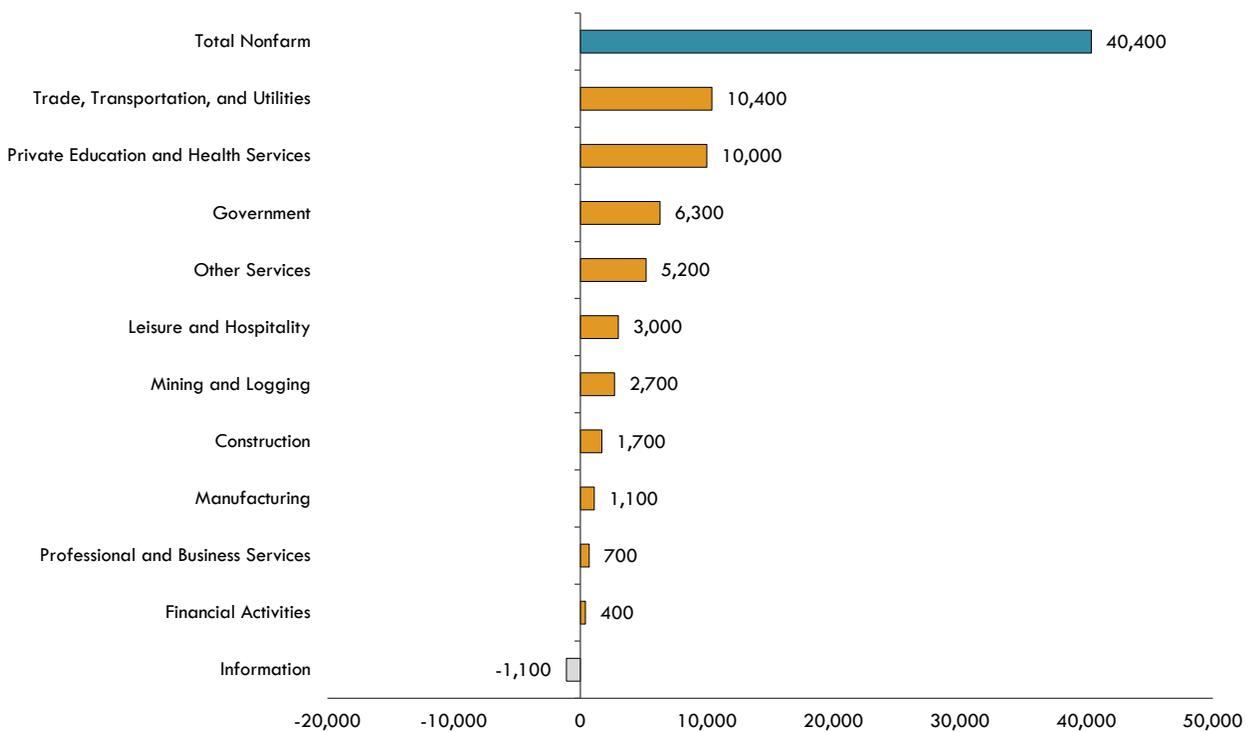


Chart 4. Over-the-year Net Change, Houston MSA Supersectors, April 2024 to April 2025



Supplemental Commentary

Houston's labor market showed solid improvement in April, adding 14,400 jobs on a not-seasonally-adjusted basis, nearly double the historical April average of 7,400. Seasonally adjusted job growth totaled 2,800 jobs, a modest gain that nonetheless reflects a clear rebound from March's weaker performance. The increase was supported by key service-oriented sectors and points to continued labor market expansion amid evolving economic conditions.

Over the past 12 months, Houston has added 40,400 jobs, representing a 1.2% annual growth rate. While this is slower than the 61,700 jobs gained during the same period last year, it still points to a labor market that is growing at a stable, sustainable pace. Ten of the region's eleven major industry sectors reported year-over-year gains, led by Trade, Transportation, and Utilities (+10,400), Private Education and Health Services (+10,000), and Government (+6,300).

April's monthly gains were broad-based, but especially strong in Professional and Business Services, which added 5,600 jobs. This is the sector's third-largest April gain since 1990 and marks a significant reversal after several months of decline and was driven by growth in Administrative and Support Services (+3,800) and Professional, Scientific, and Technical Services (+1,900). Leisure and Hospitality (+3,900) also outperformed its typical April gains, boosted by Accommodation and Food Services (+3,700).

Other contributors to April's job growth included Private Education and Health Services (+1,800), with all gains coming from Health Care and Social Assistance. Trade, Transportation, and Utilities (+1,100) saw increases driven by Retail Trade (+1,100) and Wholesale Trade (+500), though partially offset by declines in Transportation and Warehousing. Manufacturing (+900) posted gains across both durable and nondurable goods. Mining and Logging (+800) continued its upward trend, primarily through growth in Support Activities for Mining, as oilfield services activity remained stable. Construction (+400) added jobs modestly, a positive sign given that the sector typically sees little to no growth in April.

Not all sectors shared in the growth, however, Other Services and Information each lost 100 jobs, and Financial Activities remained flat for the month. Within Government, Local Government declined by 5,900 jobs, though this was largely offset by gains in State (+1,200) and Federal Government (+200), resulting in a small net gain.

The unemployment rate in Houston fell to 3.9%, down from 4.2% in March, in line with seasonal trends but slightly above the 3.7% rate recorded a year earlier. The number of unemployed residents declined to 153,374, a drop of nearly 10,000 from the previous month.

New federal policies on tariffs and immigration are beginning to reshape the national economic environment. As Houston continues to navigate these policy-related headwinds, April's employment data suggests a labor market that is strong, with gains in several sectors helping to offset broader uncertainty. However, it is still too early to fully assess the local impact of these national policy changes.

Encouragingly, Houston's job growth in April mirrored the national trend, with the U.S. adding 177,000 jobs for the month. This is a sign of continued resilience in both the local and national labor markets. This momentum offers hope that Houston may be well-positioned to manage upcoming economic shifts, particularly as businesses and households adjust to a more complex policy landscape.

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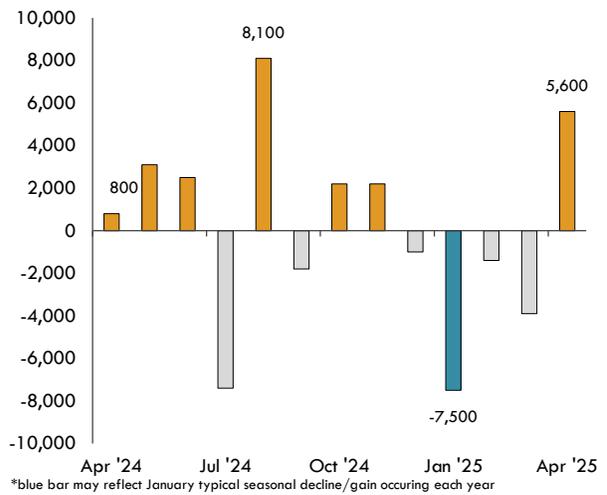
GAINING INDUSTRY HIGHLIGHTS

Professional and Business Services

Over-the-month Change

Professional and Business Services was the largest gaining sector over the month up 5,600 jobs, or 1.0 percent (see Chart 6). This was the third-largest gain in the month of April since records began in 1990. Historically in the month of April, Professional and Business Services has added an average of 1,600 jobs over the month, which indicates that this month's gains are substantially above the long-term average. Administrative and Support and Waste Management and Remediation Services was the largest contributor to the overall sector's increase, up 3,800 jobs over the month. The second-largest contributor was Professional, Scientific, and Technical Services, which added 1,900 jobs from March to April. Lastly, Management of Companies and Enterprises offset a portion of the sector's gains with a loss of -100 jobs. Professional and Business Services employment was revised upward by 300 jobs for a February to March smaller net loss of -3,900 compared to an original estimate of -4,200 jobs.

Chart 6. Professional and Business Services (NSA)
Over-the-month Net Change, Apr-24 to Apr-25

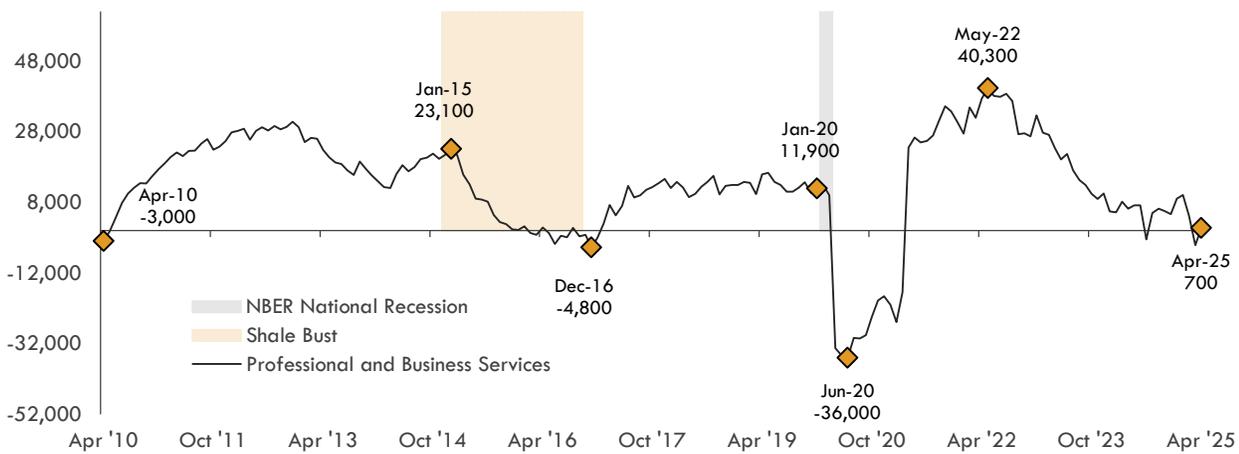


Over-the-year Change

Year over year, Professional and Business Services was up 700 jobs, or 0.1 percent (see Chart 7). Professional, Scientific, and Technical Services was the largest contributor to the overall sector's increase, up 4,900 jobs over the year. One component industry that provided a partial offset was Management of Companies and Enterprises, which lost -800 jobs from April a year ago. Lastly, Administrative and Support and Waste Management and Remediation Services offset a portion of the sector's gains with a loss of -3,400 jobs. Total Professional and Business Services employment (NSA) now exceeds its February

2020 pre-pandemic level of 514,800 jobs by 47,700, or 9.3 percent. At the same time, the sector's share of Houston area Total Nonfarm Employment has fallen from 16.4 percent to 16.2 percent over the past year.

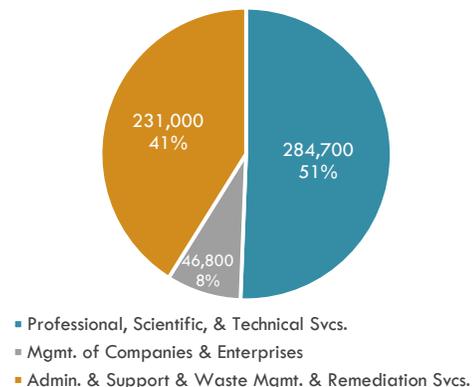
Chart 7. Professional and Business Services (NSA)
Over-the-year Net Change, Apr-10 to Apr-25



About This Sector

This sector is composed of establishments specializing in professional, scientific, and technical activities; management of establishments holding equity interests in order to influence management decisions; and office administration, hiring of personnel, security, cleaning, and waste disposal. Of the three main component industries, Professional, Scientific, and Technical Services accounts for a slight majority of the sector's employment at just over 51 percent (see Chart 8).

Chart 8. Employment in Component Industries of Professional and Business Services Sector - April 2025

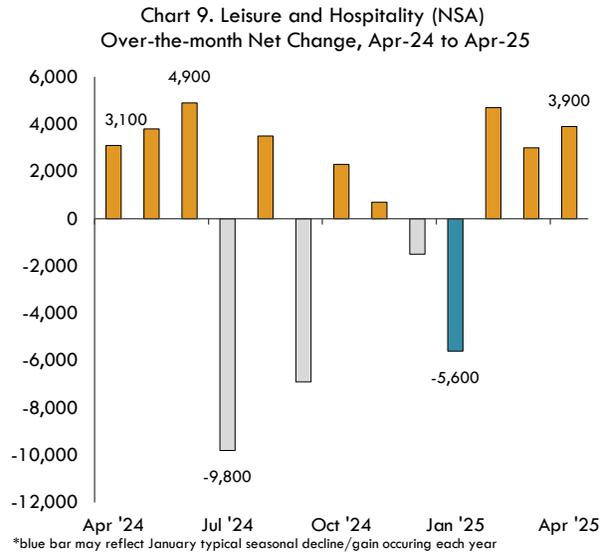


GAINING INDUSTRY HIGHLIGHTS

Leisure and Hospitality

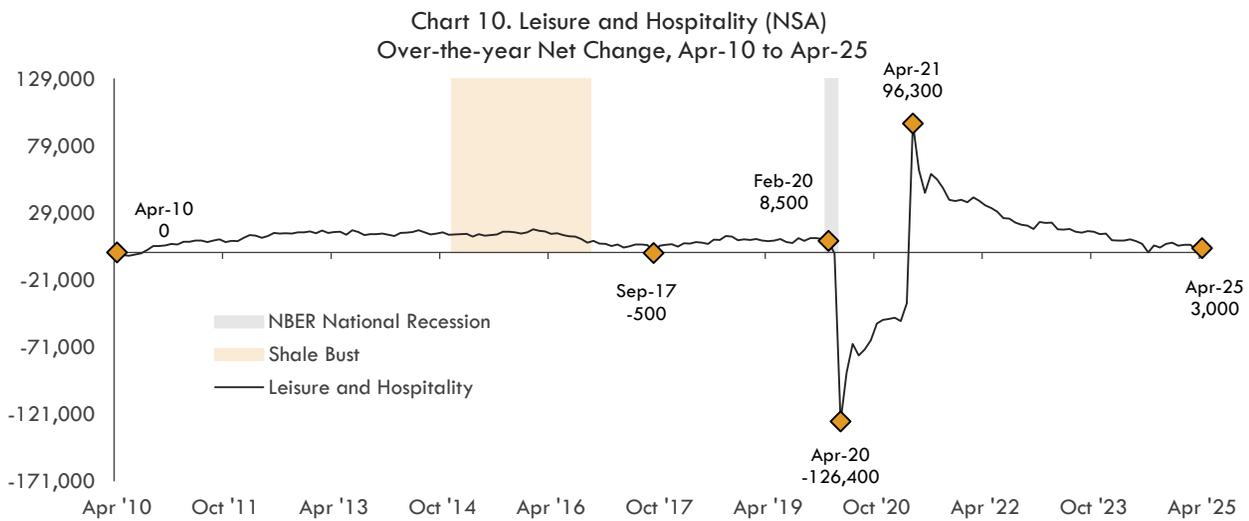
Over-the-month Change

Leisure and Hospitality was the second-largest gaining sector over the month up 3,900 jobs, or 1.1 percent (see Chart 9). Historically in the month of April, Leisure and Hospitality has added an average of 2,200 jobs over the month, which indicates that this month's gains are substantially above the long-term average. Accommodation and Food Services was the largest contributor to the overall sector's increase, up 3,700 jobs over the month. The second-largest contributor was Arts, Entertainment, and Recreation, which added 200 jobs from March to April. Leisure and Hospitality employment was revised downward by -100 jobs for a February to March smaller net gain of 3,000 compared to an original estimate of 3,100 jobs.



Over-the-year Change

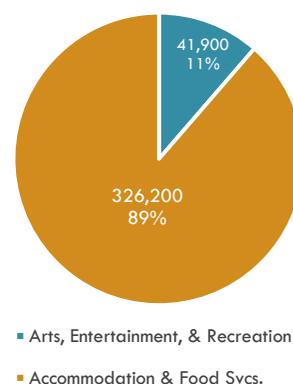
Year over year, Leisure and Hospitality was up 3,000 jobs, or 0.8 percent (see Chart 10). Accommodation and Food Services was the largest contributor to the overall sector's increase, up 1,600 jobs over the year. The second-largest contributor was Arts, Entertainment, and Recreation, which added 1,400 jobs from April a year ago. Total Leisure and Hospitality employment (NSA) now exceeds its February 2020 pre-pandemic level of 334,600 jobs by 33,500, or 10.0 percent. At the same time, the sector's share of Houston area Total Nonfarm Employment has remained constant at 10.6 percent over the past year.



About This Sector

This sector is composed of establishments that produce and promote in live performances, events, or exhibits of historical, cultural, or educational interest or related to recreation or hobbies intended for public viewing; and provide customers with lodging and/or meals and beverages for immediate consumption. NOTE: movie theaters are classified under the Information sector rather than Leisure and Hospitality. Of the two main component industries, Accommodation and Food Services accounts for the majority of the sector's employment at 89 percent (see Chart 11).

Chart 11. Employment in Component Industries of Leisure and Hospitality Sector - April 2025

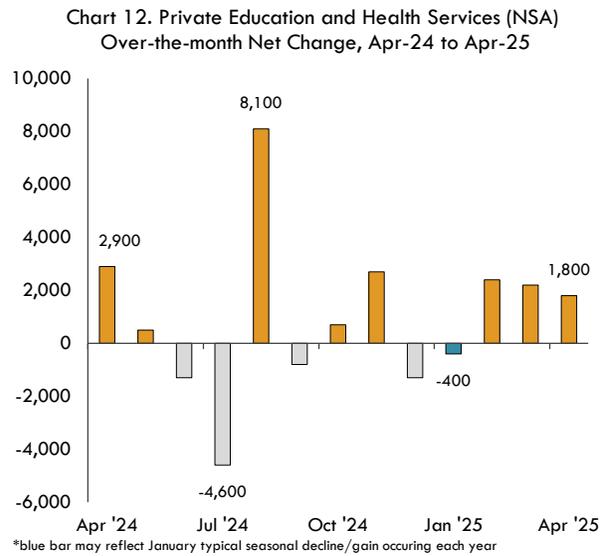


GAINING INDUSTRY HIGHLIGHTS

Private Education and Health Services

Over-the-month Change

Private Education and Health Services was the third-largest gaining sector over the month up 1,800 jobs, or 0.4 percent (see Chart 12). Historically in the month of April, Private Education and Health Services has added an average of 1,000 jobs over the month, which indicates that this month's gains are substantially above the long-term average. Health Care and Social Assistance was the largest contributor to the overall sector's increase, up 1,800 jobs over the month. One component industry, Private Educational Services, saw no change from March to April. Private Education and Health Services employment was revised upward by 500 jobs for a February to March larger net gain of 2,200 compared to an original estimate of 1,700 jobs.

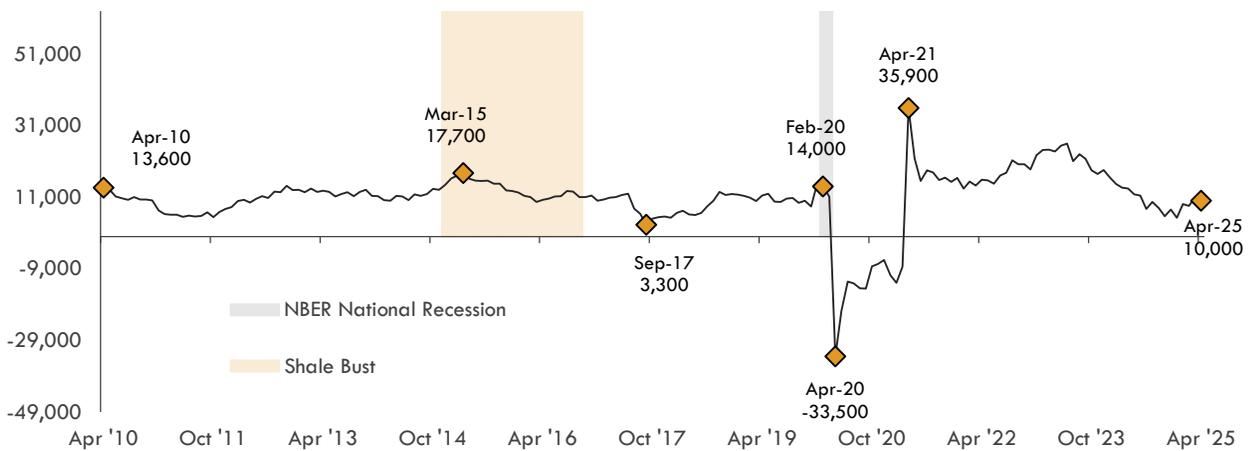


Over-the-year Change

Year over year, Private Education and Health Services was up 10,000 jobs, or 2.2 percent (see Chart 13). Among sectors currently showing growth, this sector is the third-fastest growing in percentage terms across the Houston area. Furthermore, 24.1 percent of total (gross) jobs added across the region over the past year can be attributed to Private Education and Health Services. Health Care and Social Assistance was the largest contributor to the overall sector's increase, up 9,800 jobs over the year. The second-largest contributor was Private Educational Services, which added 200 jobs from April a year ago. Total

Private Education and Health Services employment (NSA) now exceeds its February 2020 pre-pandemic level of 414,600 jobs by 54,000, or 13.0 percent. At the same time, the sector's share of Houston area Total Nonfarm Employment has risen from 13.4 percent to 13.5 percent over the past year.

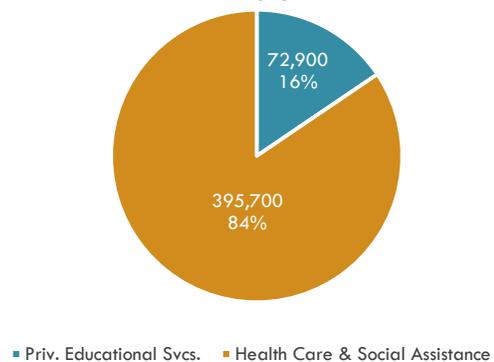
Chart 13. Private Education and Health Services (NSA)
Over-the-year Net Change, Apr-10 to Apr-25



About This Sector

This sector is composed of establishments that provide private education services (i.e. excluding publicly-funded primary, secondary, and postsecondary institutions) and establishments that provide healthcare and social assistance to individuals. Of the two main component industries, Health Care and Social Assistance accounts for the majority of the sector's employment at 84 percent (see Chart 14).

Chart 14. Employment in Component Industries of
Private Education and Health Services Sector - April
2025

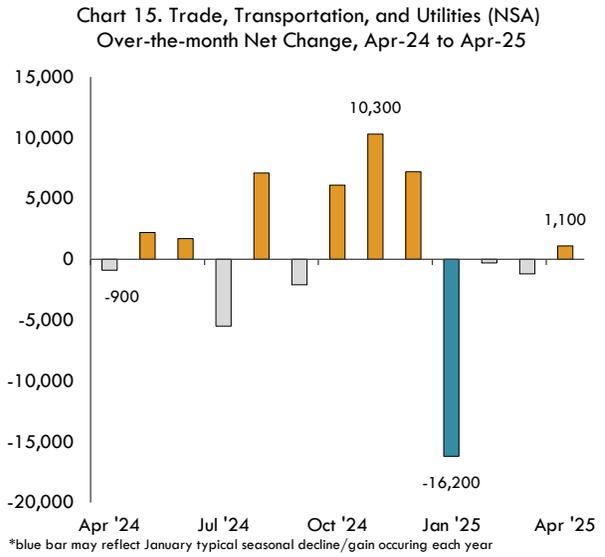


GAINING INDUSTRY HIGHLIGHTS

Trade, Transportation, and Utilities

Over-the-month Change

Trade, Transportation, and Utilities was the fourth-largest gaining sector over the month up 1,100 jobs, or 0.2 percent (see Chart 15). Historically in the month of April, Trade, Transportation, and Utilities has added an average of 500 jobs over the month, which indicates that this month's gains are moderately above the long-term average. Retail Trade was the largest contributor to the overall sector's increase, up 1,100 jobs over the month. The second-largest contributor was Wholesale Trade, which added 500 jobs from March to April. Lastly, Transportation, Warehousing, and Utilities offset a portion of the sector's gains with a loss of -500 jobs. Trade, Transportation, and Utilities employment was revised downward by -500 jobs for a February to March larger net loss of -1,200 compared to an original estimate of -700 jobs.

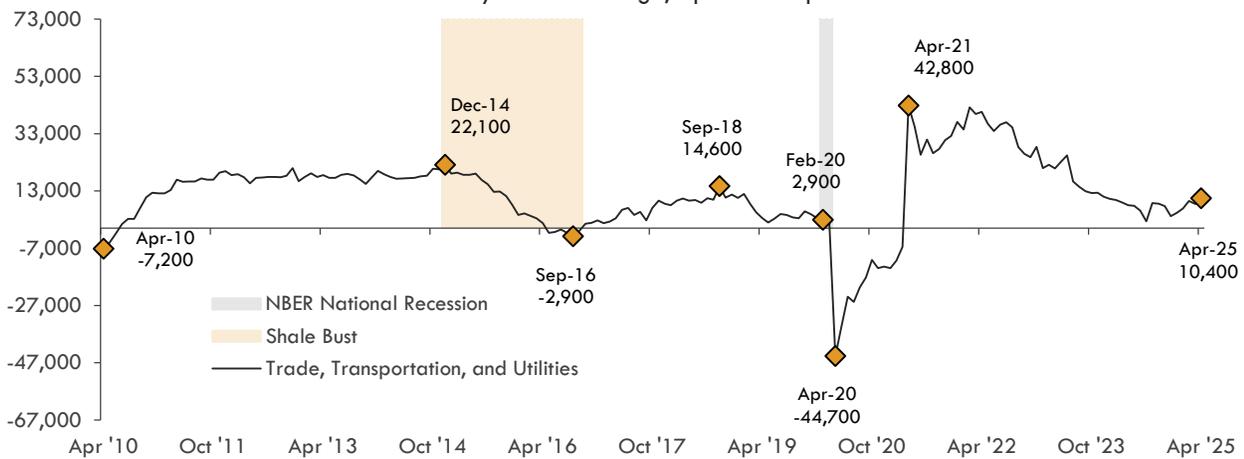


Over-the-year Change

Year over year, Trade, Transportation, and Utilities was up 10,400 jobs, or 1.5 percent (see Chart 16). This was the largest over-the-year gain since December 2023's increase of 11,000 jobs. Furthermore, 25.1 percent of total (gross) jobs added across the region over the past year can be attributed to Trade, Transportation, and Utilities. Transportation, Warehousing, and Utilities was the largest contributor to the overall sector's increase, up 4,600 jobs over the year. The second-largest contributor was Wholesale Trade, which added 3,600 jobs from April a year ago. Lastly, Retail Trade contributed, 2,200 jobs. Total Trade,

Transportation, and Utilities employment (NSA) now exceeds its February 2020 pre-pandemic level of 628,700 jobs by 71,100, or 11.3 percent. At the same time, the sector's share of Houston area Total Nonfarm Employment has remained constant at 20.1 percent over the past year.

Chart 16. Trade, Transportation, and Utilities (NSA) Over-the-year Net Change, Apr-10 to Apr-25



About This Sector

This sector is composed of establishments wholesaling agriculture, mining, and manufactured goods; retailing goods in small quantities to the public incl. online; transporting passengers and cargo; warehousing and storage; and providing electricity, natural gas, water, and sewage removal. Of the three main component industries, Retail Trade accounts for a plurality of the sector's employment at 46 percent (see Chart 17).

Chart 17. Employment in Component Industries of Trade, Transportation, and Utilities Sector - April 2025

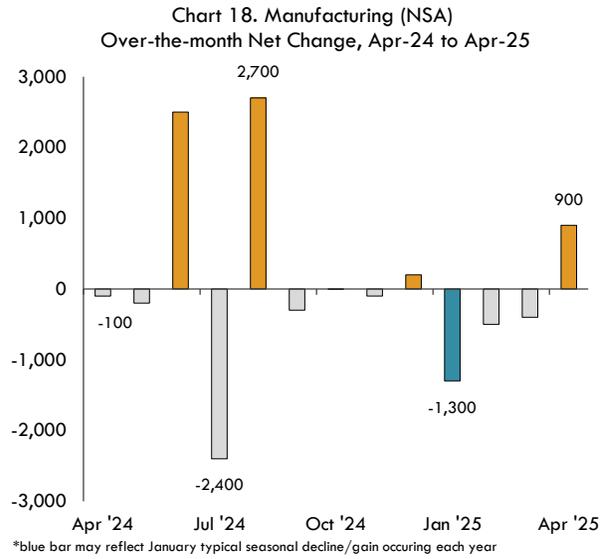


GAINING INDUSTRY HIGHLIGHTS

Manufacturing

Over-the-month Change

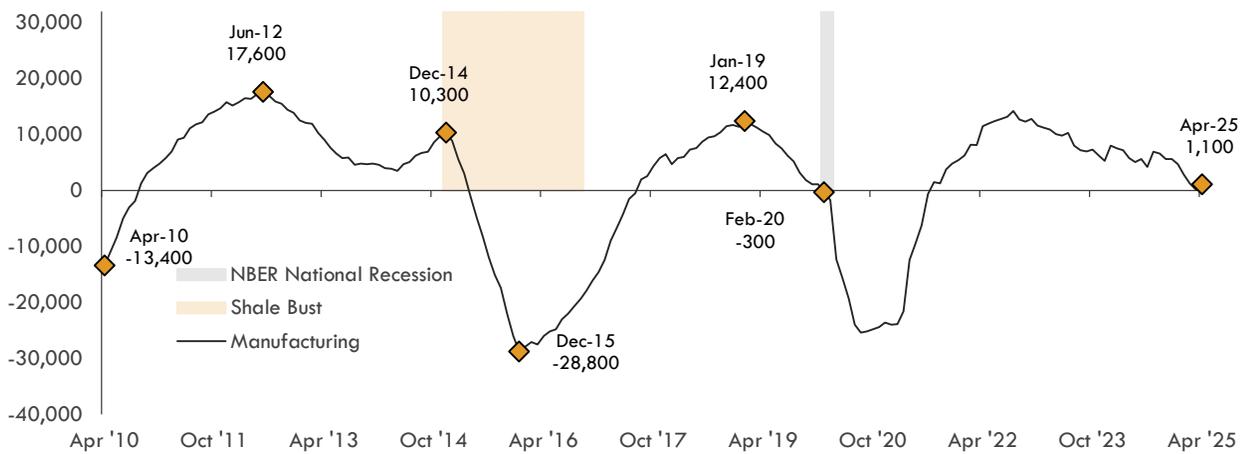
Manufacturing was the fifth-largest gaining sector over the month up 900 jobs, or 0.4 percent (see Chart 18). Historically in the month of April, Manufacturing has lost an average of -300 jobs over the month, which indicates that this month's gains are substantially in contrast to the long-term average decline. Durable Goods was the largest contributor to the overall sector's increase, up 1,000 jobs over the month. One component industry that provided a partial offset was Non-Durable Goods, which lost -100 jobs from March to April. Manufacturing employment was revised downward by -1,100 jobs for a February to March complete erasure of gains leaving a net loss of -400 compared to an original estimate of 700 jobs.



Over-the-year Change

Year over year, Manufacturing was up 1,100 jobs, or 0.5 percent (see Chart 19). Non-Durable Goods was the largest contributor to the overall sector's increase, up 1,500 jobs over the year. One component industry that provided a partial offset was Durable Goods, which lost -400 jobs from April a year ago. Total Manufacturing employment (NSA) now exceeds its February 2020 pre-pandemic level of 234,700 jobs by 4,700, or 2.0 percent. At the same time, the sector's share of Houston area Total Nonfarm Employment has remained constant at 6.9 percent over the past year.

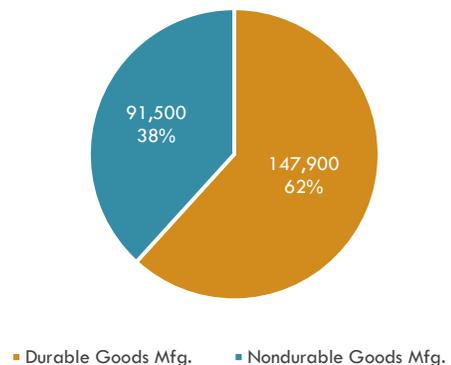
Chart 19. Manufacturing (NSA)
Over-the-year Net Change, Apr-10 to Apr-25



About This Sector

This sector comprises establishments engaged in the mechanical, physical, or chemical transformation of materials, substances, or components into new products. Of the two main component industries, Durable Goods accounts for the majority of the sector's employment at 62 percent (see Chart 20).

Chart 20. Employment in Component Industries of Manufacturing Sector - April 2025

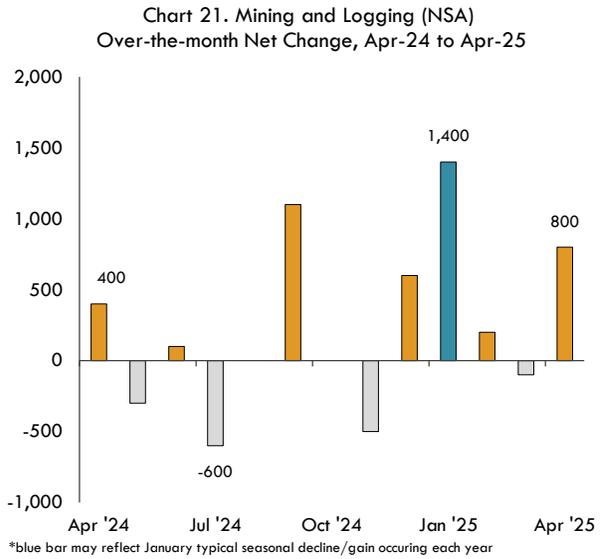


GAINING INDUSTRY HIGHLIGHTS

Mining and Logging

Over-the-month Change

Mining and Logging was the sixth-largest gaining sector over the month up 800 jobs, or 1.0 percent (see Chart 21). Historically in the month of April, Mining and Logging has seen no change in jobs over the month, which indicates that this month's gains are substantially above the long-term average. Support Activities for Mining was the largest contributor to the overall sector's increase, up 300 jobs over the month. The second-largest contributor was Oil and Gas Extraction, which added 300 jobs from March to April. Lastly, Other Mining and Logging Undefined contributed, 200 jobs. Mining and Logging employment was revised upward by 300 jobs for a February to March smaller net loss of -100 compared to an original estimate of -400 jobs.

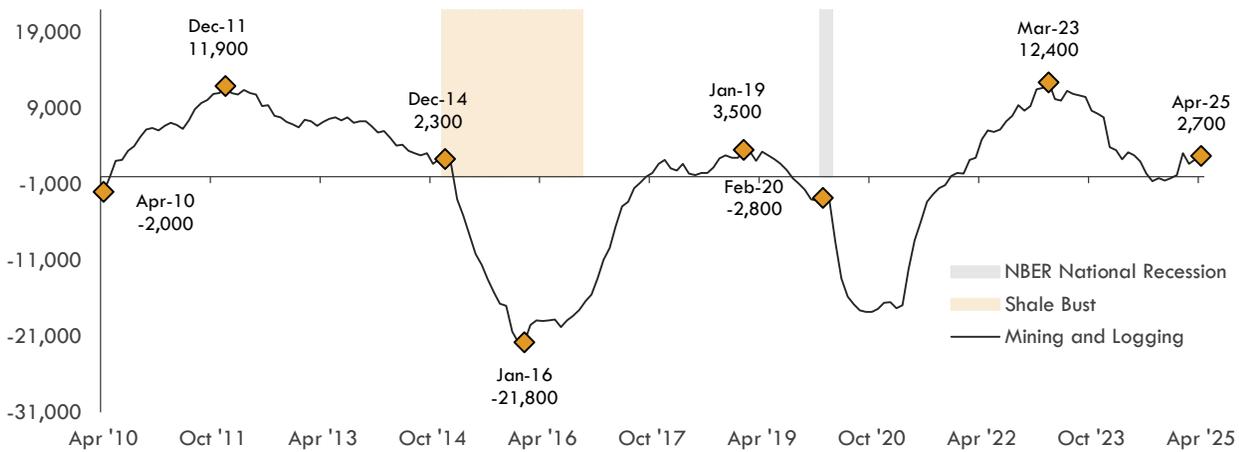


Over-the-year Change

Year over year, Mining and Logging was up 2,700 jobs, or 3.5 percent (see Chart 22). This was the largest over-the-year gain since January 2025's increase of 3,100 jobs. Among sectors currently showing growth, this sector is the second-fastest growing in percentage terms across the Houston area. Support Activities for Mining was the largest contributor to the overall sector's increase, up 1,300 jobs over the year. The second-largest contributor was Oil and Gas Extraction, which added 1,100 jobs from April a year ago. Lastly, Other Mining and Logging Undefined contributed, 300 jobs. Total Mining and Logging

employment (NSA) now exceeds its February 2020 pre-pandemic level of 78,400 jobs by 2,500, or 3.2 percent. At the same time, the sector's share of Houston area Total Nonfarm Employment has remained constant at 2.3 percent over the past year.

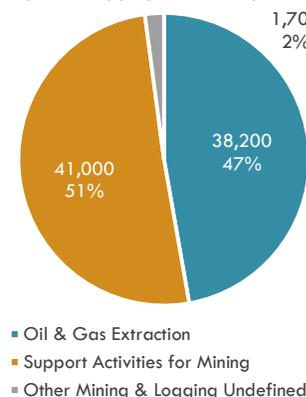
Chart 22. Mining and Logging (NSA)
Over-the-year Net Change, Apr-'10 to Apr-'25



About This Sector

This sector comprises establishments extracting naturally occurring minerals such as coal and ores; liquid minerals, such as crude petroleum and natural gas; and timber. Of the three main component industries, Support Activities for Mining accounts for a slight majority of the sector's employment at just over 51 percent (see Chart 23).

Chart 23. Employment in Component Industries of Mining and Logging Sector - April 2025

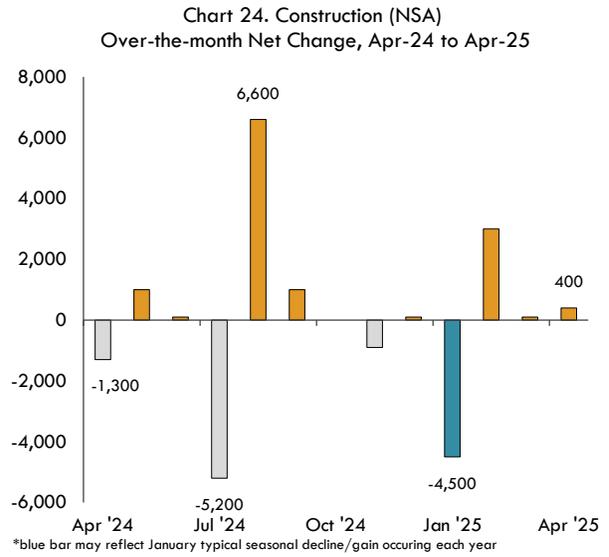


GAINING INDUSTRY HIGHLIGHTS

Construction

Over-the-month Change

Construction was the seventh-largest gaining sector over the month up 400 jobs, or 0.2 percent (see Chart 24). Historically in the month of April, Construction has lost an average of -400 jobs over the month, which indicates that this month's gains are moderately in contrast to the long-term average decline. Construction of Buildings was the largest contributor to the overall sector's increase, up 500 jobs over the month. One component industry, Specialty Trade Contractors, saw no change from March to April. Lastly, Heavy and Civil Engineering Construction offset a portion of the sector's gains with a loss of -100 jobs. Construction employment was revised downward by -1,200 jobs for a February to March smaller net gain of 100 compared to an original estimate of 1,300 jobs.

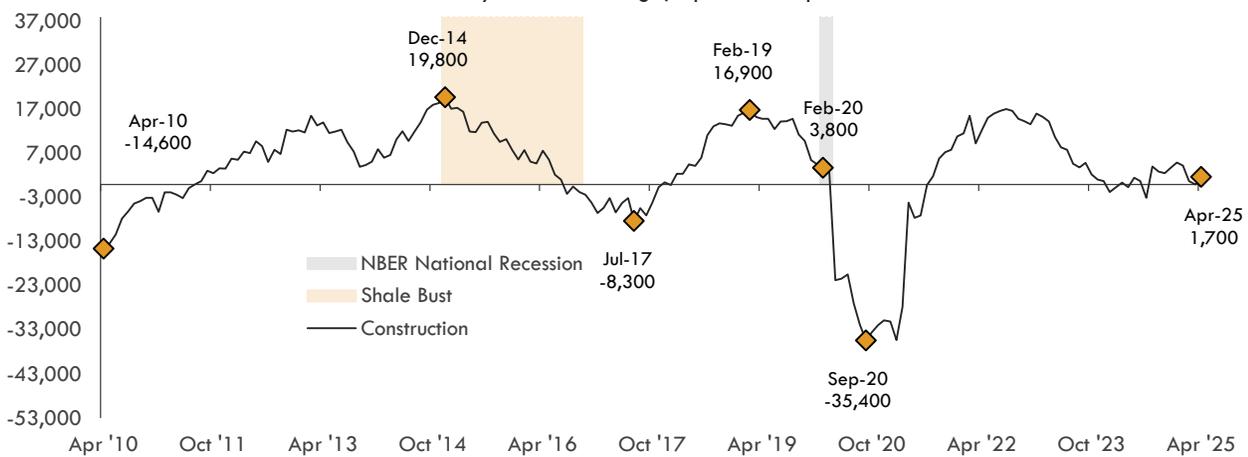


Over-the-year Change

Year over year, Construction was up 1,700 jobs, or 0.7 percent (see Chart 25). This was the largest over-the-year gain since January 2025's increase of 4,300 jobs. Construction of Buildings was the largest contributor to the overall sector's increase, up 1,000 jobs over the year. The second-largest contributor was Heavy and Civil Engineering Construction, which added 800 jobs from April a year ago. Lastly, Specialty Trade Contractors offset a portion of the sector's gains with a loss of -100 jobs. Total Construction employment (NSA) remains -3,700 jobs, or -1.6 percent below its February 2020 pre-pandemic

level of 237,400. At the same time, the sector's share of Houston area Total Nonfarm Employment has remained constant at 6.8 percent over the past year.

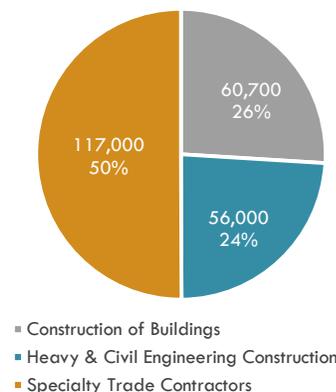
Chart 25. Construction (NSA)
Over-the-year Net Change, Apr-10 to Apr-25



About This Sector

This sector comprises establishments engaged in the construction of buildings, infrastructure, site preparation and sub-division, and specialty trades e.g. masonry, painting, and electrical work. Of the three main component industries, Specialty Trade Contractors accounts for a slight majority of the sector's employment at just over 50 percent (see Chart 26).

Chart 26. Employment in Component Industries of Construction Sector - April 2025

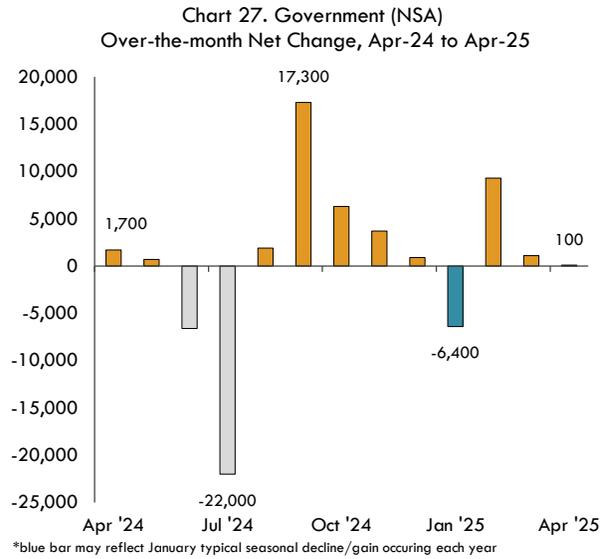


GAINING INDUSTRY HIGHLIGHTS

Government

Over-the-month Change

Government was the eighth-largest gaining sector over the month up 100 jobs, or 0.0 percent (see Chart 27). Historically in the month of April, Government has added an average of 800 jobs over the month, which indicates that this month's gains are slightly below the long-term average. State Government was the largest contributor to the overall sector's increase, up 1,200 jobs over the month. The second-largest contributor was Federal Government, which added 200 jobs from March to April. Lastly, Local Government offset a portion of the sector's gains with a loss of -1,300 jobs. Government employment was revised downward by -1,500 jobs for a February to March smaller net gain of 1,100 compared to an original estimate of 2,600 jobs.

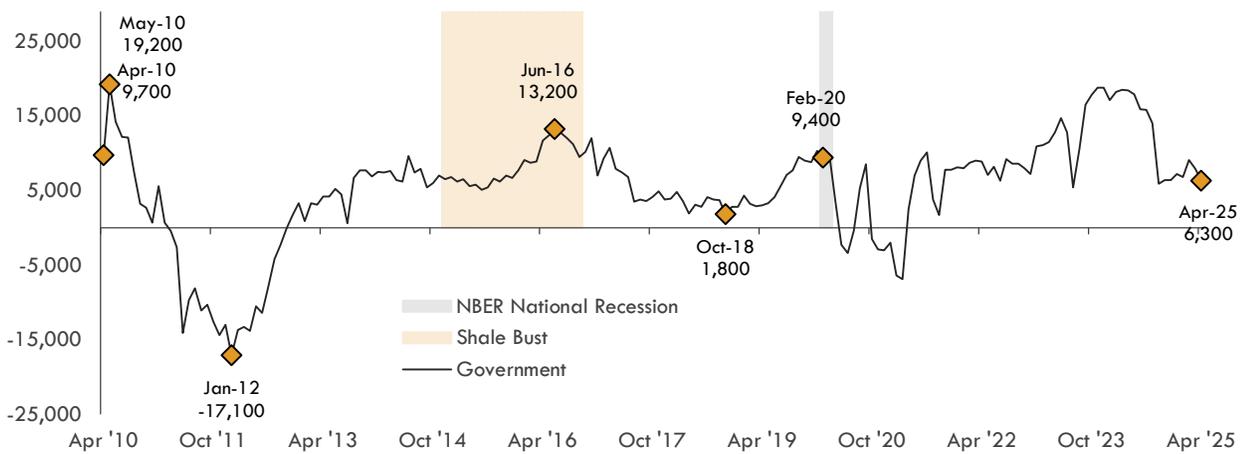


Over-the-year Change

Year over year, Government was up 6,300 jobs, or 1.4 percent (see Chart 28). Furthermore, 15.2 percent of total (gross) jobs added across the region over the past year can be attributed to Government. State Government was the largest contributor to the overall sector's increase, up 3,500 jobs over the year. The second-largest contributor was Local Government, which added 1,900 jobs from April a year ago. Lastly, Federal Government contributed, 900 jobs. Total Government employment (NSA) now exceeds its February 2020 pre-pandemic level of 429,300 jobs by 41,900, or 9.8 percent. At

the same time, the sector's share of Houston area Total Nonfarm Employment has remained constant at 13.6 percent over the past year.

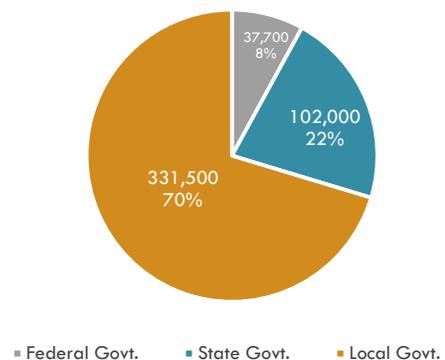
Chart 28. Government (NSA) Over-the-year Net Change, Apr-10 to Apr-25



About This Sector

This sector consists of establishments of federal, state, and local government agencies that administer, oversee, and manage public programs and have executive, legislative, or judicial authority over other institutions within a given area that are not performed by private establishments. For MSA data, this includes public education but excludes healthcare. Of the three main component industries, Local Government accounts for the majority of the sector's employment at 70 percent (see Chart 29).

Chart 29. Employment in Component Industries of Government Sector - April 2025

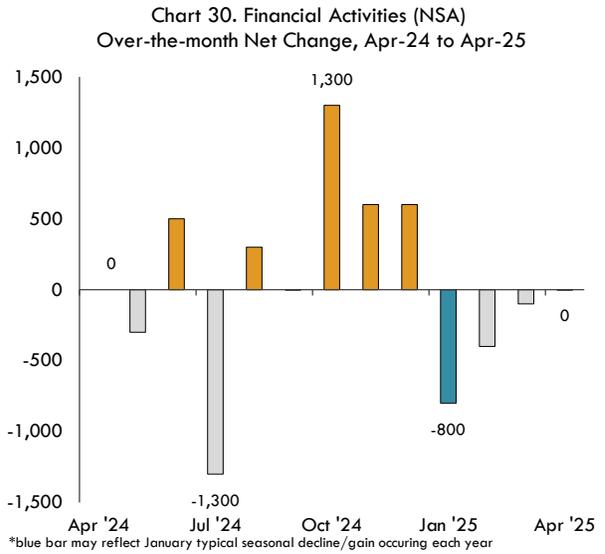


GAINING INDUSTRY HIGHLIGHTS

Financial Activities

Over-the-month Change

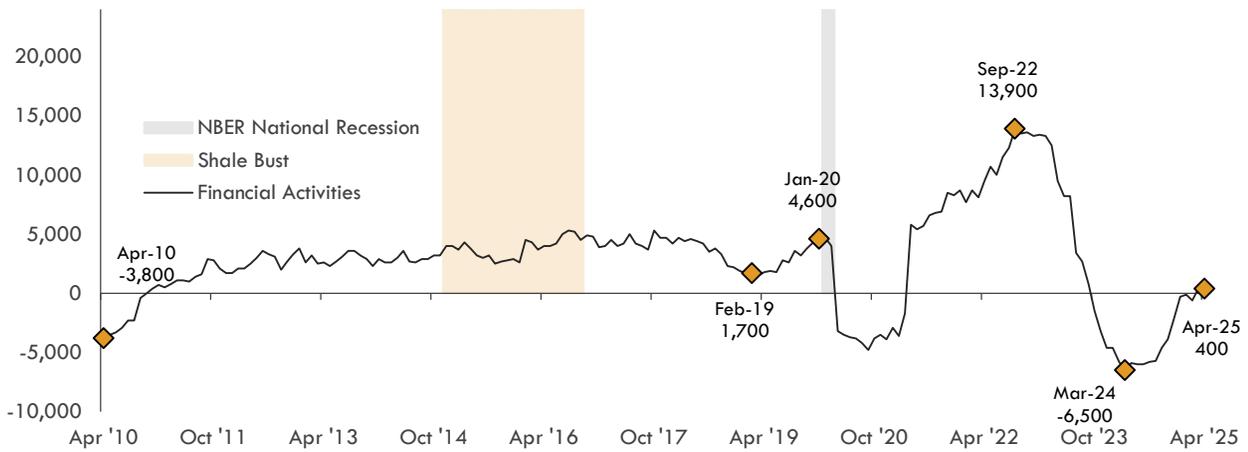
Financial Activities was unchanged over the month. (see Chart 30). Historically in the month of April, Financial Activities has added an average of 300 jobs over the month, which indicates that this month's net zero change is moderately in contrast to the long-term average gain. Real Estate and Rental and Leasing was the largest source of gains despite no change to the overall sector, up 200 jobs over the month. One component industry that provided a partial offset was Finance and Insurance, which lost -200 jobs. Financial Activities employment saw no revision from February to March leaving the previous month's original decrease of -100 intact.



Over-the-year Change

Year over year, Financial Activities was up 400 jobs, or 0.2 percent (see Chart 31). Real Estate and Rental and Leasing was the largest contributor to the overall sector's increase, up 500 jobs over the year. One component industry that provided a partial offset was Finance and Insurance, which lost -100 jobs from April a year ago. Total Financial Activities employment (NSA) now exceeds its February 2020 pre-pandemic level of 169,200 jobs by 11,900, or 7.0 percent. At the same time, the sector's share of Houston area Total Nonfarm Employment has remained constant at 5.3 percent over the past year.

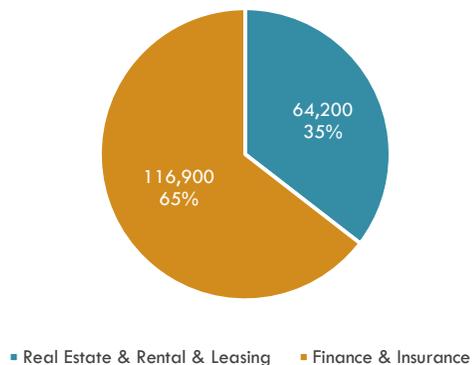
Chart 31. Financial Activities (NSA)
Over-the-year Net Change, Apr-10 to Apr-25



About This Sector

This sector is composed of establishments renting, leasing, or allowing use of assets, and financial transactions such as creation, liquidation, or change in ownership of financial assets, underwriting of insurance, and annuities. Of the two main component industries, Finance and Insurance accounts for the majority of the sector's employment at 65 percent (see Chart 32).

Chart 32. Employment in Component Industries of
Financial Activities Sector - April 2025

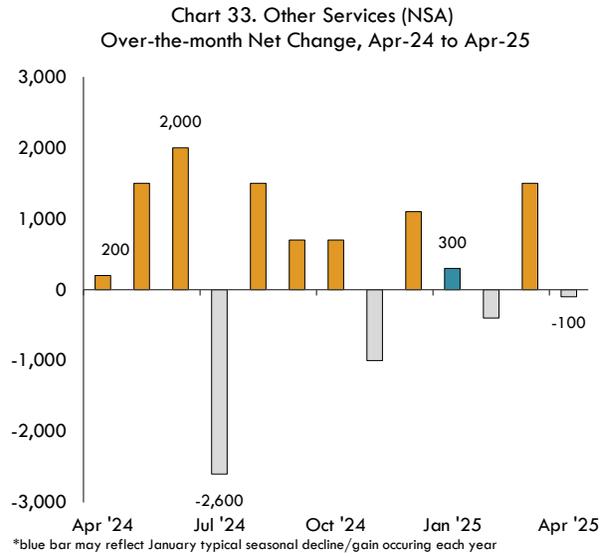


DECLINING INDUSTRY HIGHLIGHTS

Other Services

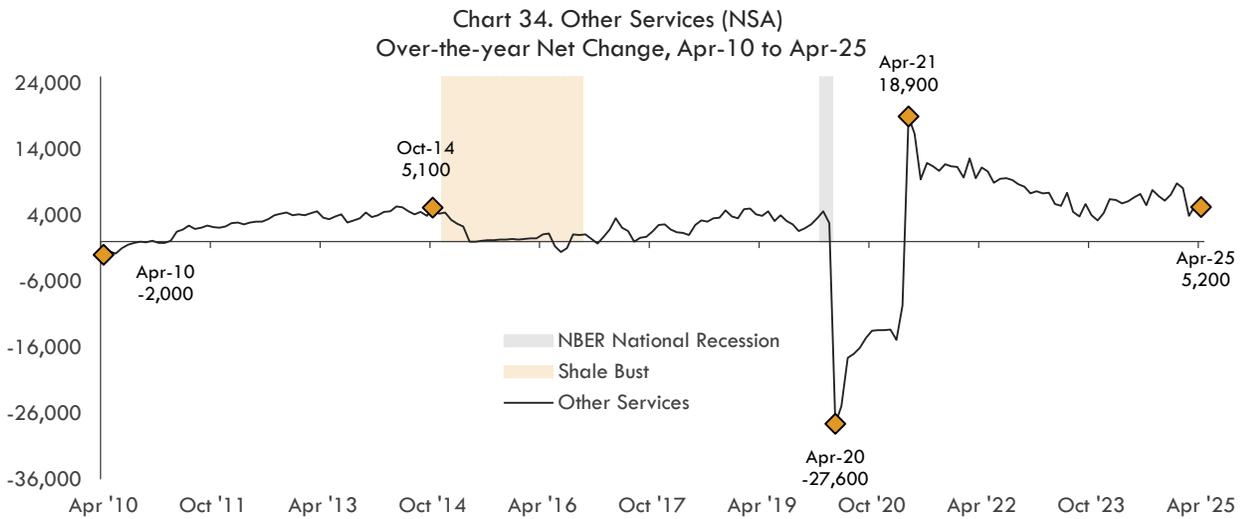
Over-the-month Change

Other Services was the largest declining sector over the month down -100 jobs, or -0.1 (see Chart 33). This April tied with 2023 for the third-largest decline in the month of April since records began in 1990. Historically in the month of April, Other Services has added an average of 1,700 jobs over the month, which indicates that this month's losses are substantially in contrast to the long-term average gain. NOTE: No subsector is published at the MSA level by the CES survey. See below for additional information. Other Services employment was revised downward by -400 jobs for a February to March smaller net gain of 1,500 compared to an original estimate of 1,900 jobs.



Over-the-year Change

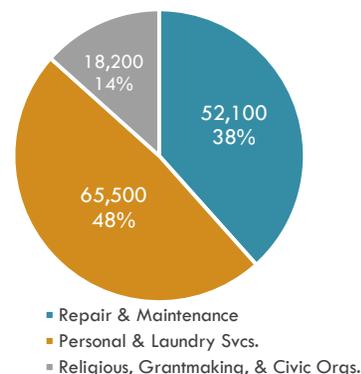
Year over year, Other Services was up 5,200 jobs, or 4.0 percent (see Chart 34). Among sectors currently showing growth, this sector is the fastest-growing in percentage terms across the Houston area. NOTE: No subsector is published at the MSA level by the CES survey. See below for additional information. Total Other Services employment (NSA) now exceeds its February 2020 pre-pandemic level of 119,200 jobs by 16,600, or 13.9 percent. At the same time, the sector's share of Houston area Total Nonfarm Employment has risen from 3.8 percent to 3.9 percent over the past year.



About This Sector

This sector comprises establishments engaged in services not classified elsewhere such as equipment and machinery repair, religious activities, grantmaking, advocacy, and providing dry-cleaning and laundry services, and personal care services. Of the three main component industries, Personal and Laundry Services accounts for a plurality of the sector's employment at 48 percent as a subsector where self-employment is prevalent (source: Census - Non Employer Statistics and BLS - Quarterly Census of Employment and Wages) (see Chart 35).

Chart 35. Employment in Component Industries of Other Services Sector - April 2025



*estimated proportions based QCEW covered and NES self-employment

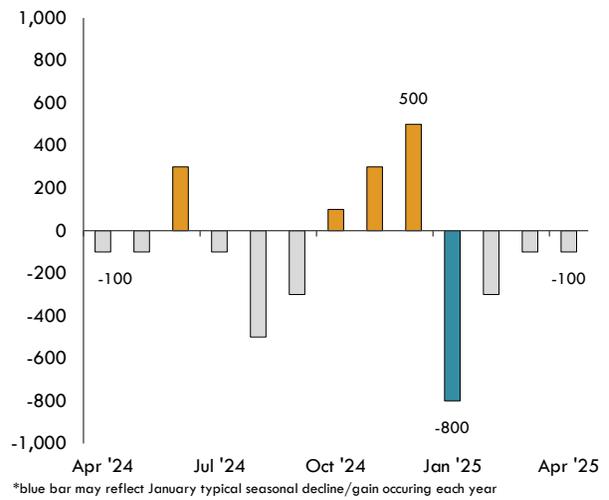
DECLINING INDUSTRY HIGHLIGHTS

Information

Over-the-month Change

Information was the second-largest declining sector over the month down -100 jobs, or -0.3 (see Chart 36). Historically in the month of April, Information has lost an average of -100 jobs over the month, which indicates that this month's losses are on par with the long-term average. Other Information Undefined was the largest contributor to the overall sector's decline, down -200 jobs over the month. One component industry that provided a partial offset was Telecommunications, which gained 100 jobs from March to April. Information employment was revised upward by 100 jobs for a February to March smaller net loss of -100 compared to an original estimate of -200 jobs.

Chart 36. Information (NSA)
Over-the-month Net Change, Apr-24 to Apr-25

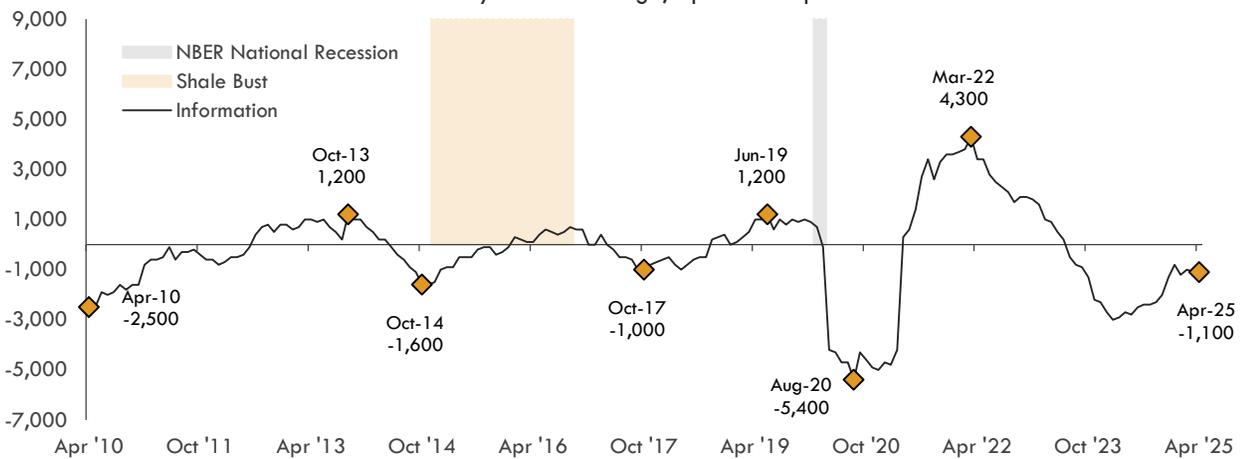


Over-the-year Change

Year over year, Information was down -1,100 jobs, or -3.6 percent (see Chart 37). Furthermore, 100.0 percent of total (gross) jobs lost across the region over the past year can be attributed to Information. Telecommunications was the largest contributor to the overall sector's decline, down -800 jobs over the year. The second-largest declining contributor was Other Information Undefined, which lost -300 jobs from April a year ago. Total Information employment (NSA) remains -3,600 jobs, or -11.0 percent below its February 2020 pre-pandemic level of 32,700. At the same time, the sector's share of Houston area

Total Nonfarm Employment has remained constant at 0.9 percent over the past year.

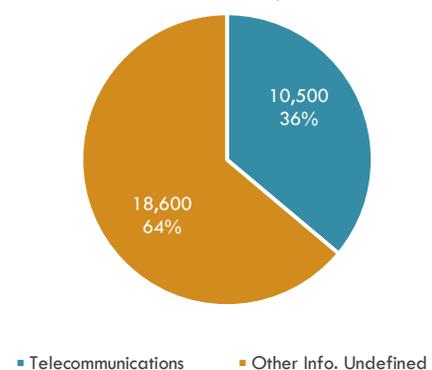
Chart 37. Information (NSA)
Over-the-year Net Change, Apr-10 to Apr-25



About This Sector

This sector comprises establishments producing and distributing information and cultural products, e.g. traditional and online news publishing; software publishing; the motion picture and sound recording; TV broadcasting; and telecommunications. Of the two main component industries, Other Information Undefined accounts for the majority of the sector's employment at 64 percent (see Chart 38).

Chart 38. Employment in Component Industries of Information Sector - April 2025



Local Area Unemployment Statistics

Not-Seasonally Adjusted

Houston Metro, Texas, and U.S. Unemployment

The Houston MSA (not-seasonally-adjusted) unemployment rate stood at 3.9 percent in April, down from March's 4.2 percent and up from 3.7 percent a year ago. This was above the statewide rate of 3.7 percent and was the same as the national rate of 3.9. An over-the-month decline in April is typical having occurred nearly 85 percent of the time over the past three decades 153,374 individuals were unemployed in Houston in April, down from March's 163,174 and up from 142,748 in April 2024 (see Charts 39 and 40).

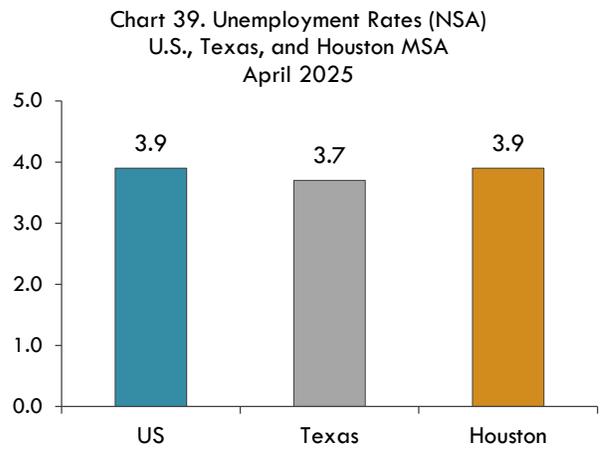
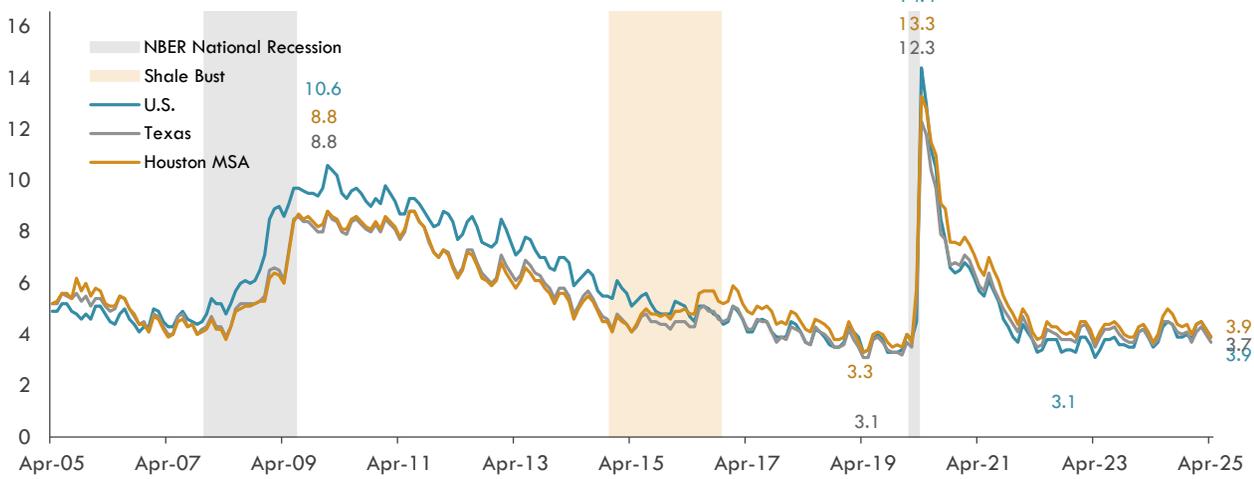


Chart 40. Unemployment Rates U.S., Texas, and Houston MSA (NSA) April 2005 to April 2025

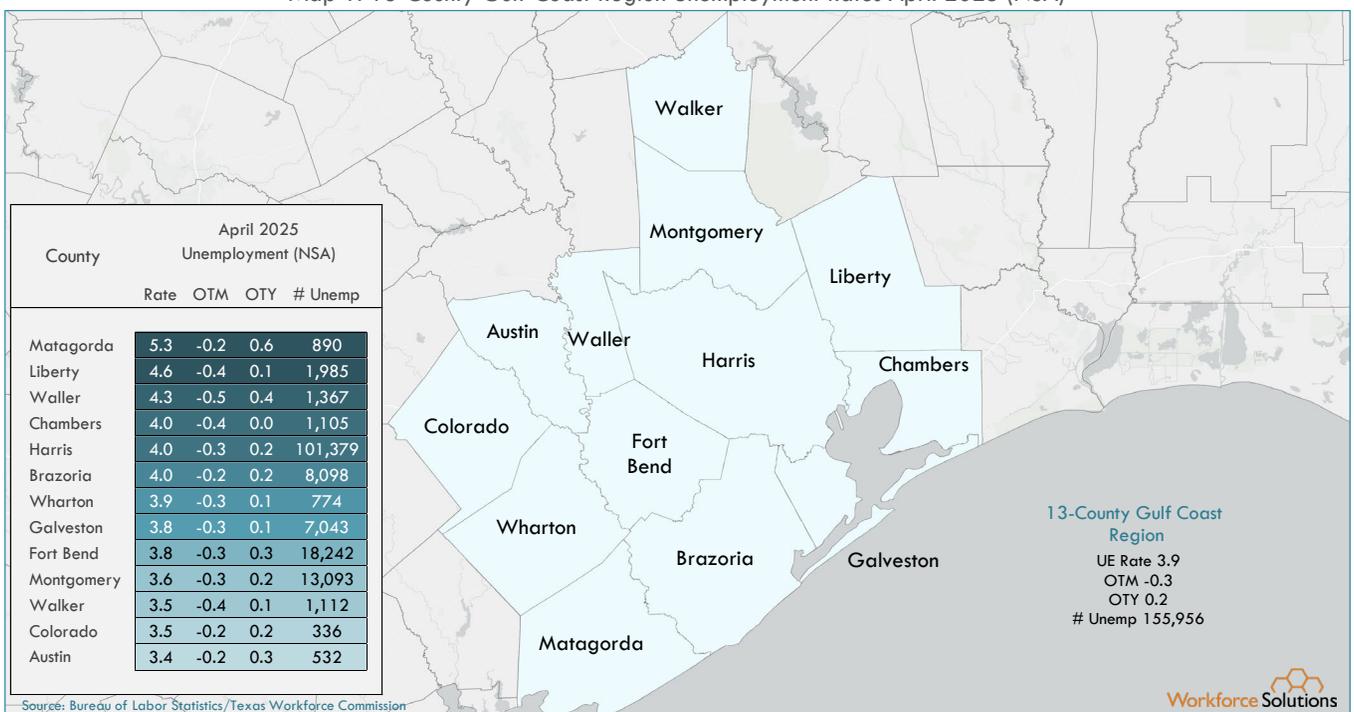


County-level Unemployment

Among the 13 counties that comprise the Gulf Coast Workforce Development Area, unemployment rates in April ranged from a high of 5.3 percent in Matagorda County to a low of 3.4 percent in Austin. Over the month, all 13 counties saw their unemployment rates decline in keeping with the region-wide decrease of -0.3 percentage points. Waller saw the largest percentage-point decrease in unemployment down -0.5 pp. representing -142 fewer unemployed workers compared to the previous month. This was followed by Walker (-0.4 pp, -110 workers) and Liberty (-0.4 pp, -179 workers). Over the year

unemployment rates rose with, Matagorda posting the largest increase, up 0.6 percentage points representing 112 more unemployed workers compared to a year ago followed by Waller (0.4 pp, 183 workers) and Austin (0.3 pp, 58 workers). Since peaking at 448,855 in April 2020 due to the COVID-19 global pandemic, the number of unemployed workers in the Gulf Coast Region has fallen by -292,899 as of this April (see Map 1 legend).

Map 1. 13-County Gulf Coast Region Unemployment Rates April 2025 (NSA)



Local Area Unemployment Statistics (continued)

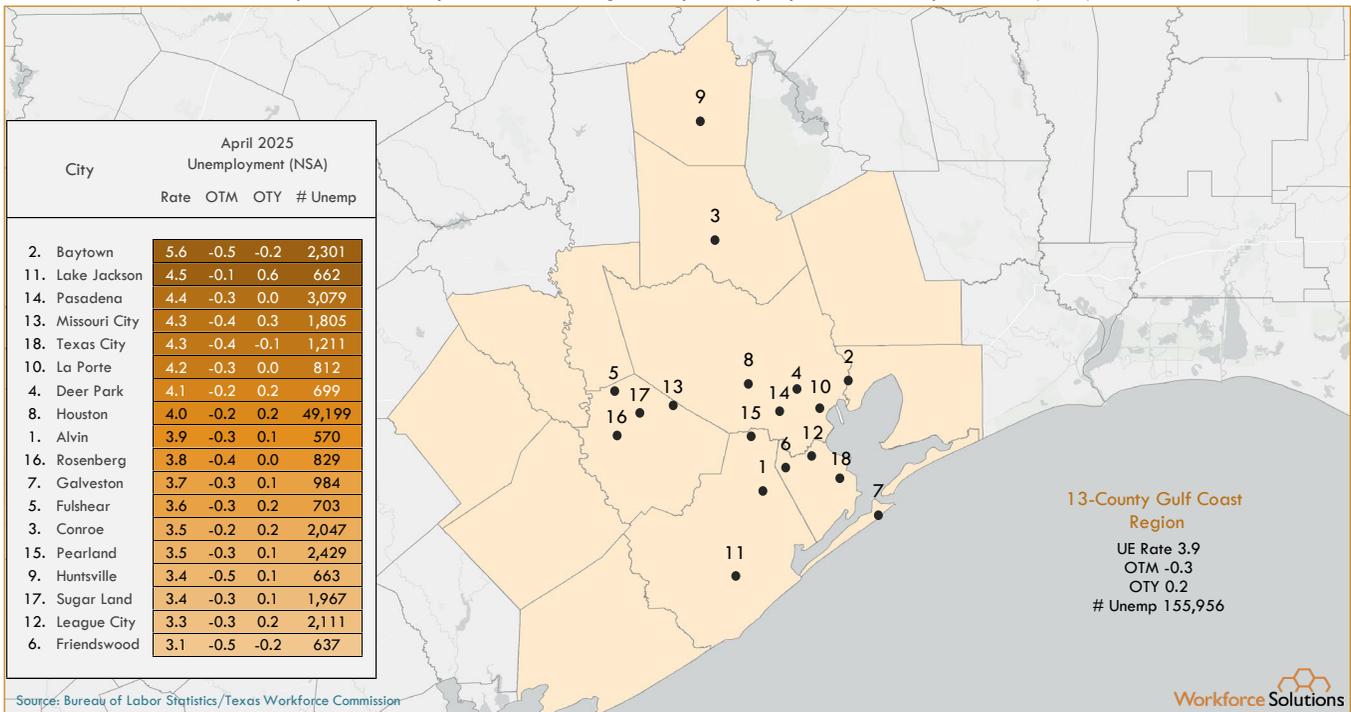
Not-Seasonally Adjusted

Unemployment Rates for Select Municipalities

Among the 18 cities in the Gulf Coast Workforce Development Area for which Local Area Unemployment Statistics are available, unemployment rates in April ranged from a high of 5.6 percent in Baytown to a low of 3.1 percent in Friendswood (see Map 2 legend). Over the month, all 18 cities saw their unemployment rates decline in keeping with region-wide decrease of -0.3 percentage points. Huntsville saw the largest percentage-point decrease in unemployment down -0.5 pp. representing -73 fewer

unemployed workers compared to the previous month. This was followed by Friendswood (-0.5 pp, -97 workers) and Baytown (-0.5 pp, -176 workers). Over the year unemployment rates rose with, Lake Jackson posting the largest increase, up 0.6 percentage points representing 108 more unemployed workers compared to a year ago followed by Missouri City (0.3 pp, 180 workers) and League City (0.2 pp, 171 workers). The 18 cities below accounted for 47 percent of the 155,956 unemployed workers across the Gulf Coast Region as of this April (see Map 2 legend).

Map 2. 13-County Gulf Coast Region City Unemployment Rates April 2025 (NSA)



Seasonally Adjusted

Per the Bureau of Labor Statistics 'Due to methodological changes and conversion to the 2020-based Office of Management and Budget (OMB) delineations, smoothed seasonally adjusted data for metropolitan areas and metropolitan divisions will not be updated in conjunction with the January, February, or March 2025 news releases, and may not become available again until a few months thereafter.

Chart 41. Unemployment Rates (SA)
 U.S., Texas, and Houston MSA
 March 2025

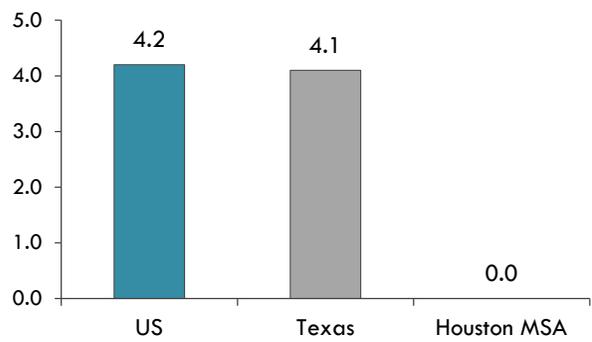
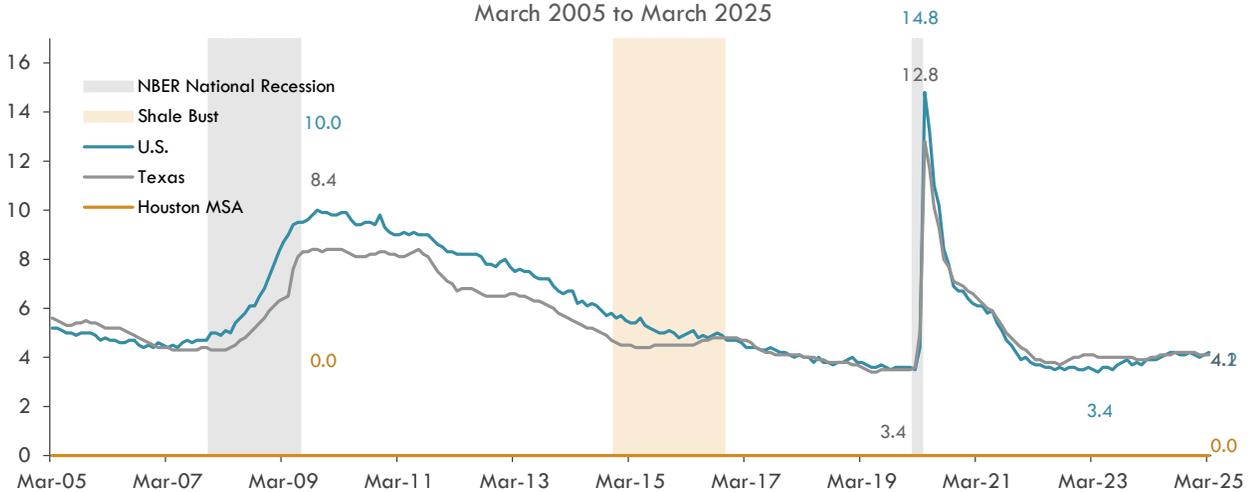


Chart 42. Unemployment Rates U.S., Texas, and Houston MSA (SA)
 March 2005 to March 2025



Gulf Coast Workforce Solutions Index (WSI)



The Gulf Coast Workforce Solutions Index (WSI)

The WSI is an indicator designed to capture shifts in the local labor market, specifically the balance between available jobs and unemployed workers at a given point in time. Values above 4.0 signal a surplus of jobs while values less than 4.0 signal a surplus of jobseekers. The Gulf Coast Workforce Board monitors the WSI as part of its ongoing review of the region's unemployment insurance work search requirement and reserves the right to adjust the number of weekly job search contacts as labor market conditions warrant. In the event of change to the work search requirement, the Board will notify the Texas Workforce Commission who will in turn notify UI recipients.

WSI Reading
April
2025:
Not Available

The Workforce Solutions Index will resume publication once seasonally-adjusted unemployment statistics for the Houston metropolitan area become available.

Source(s): Emsi-Burning Glass and BLS/TWC - LAUS
Note: data subject to revisions.



Workforce Solutions Index April 2025

The Houston MSA WSI for November stood at 3.51, down from October's slight upward revision to 3.62. This was the result of a -12,000 decline in the number of active job ads in November coupled with a slight increase in the number of unemployed individuals north of 160,000 in recent months.

The index has continued to trend sideways for the past year, while remaining below the equilibrium value of 4.0. As a result, the WSI continues to suggest that a requirement of three work search activities may be appropriate for individuals receiving unemployment insurance given the relative availability of jobs at present.



Houston Area Employment Situation

April 2025

Table 1. Houston MSA Sectors and Major Industry Subcomponents

NAICS Industry	Apr-25	Mar-25	Apr-24	Monthly	Monthly	Yearly	Yearly %
Total Nonfarm	3,470,200	3,455,800	3,429,800	14,400	0.4%	40,400	1.2%
Total Private	2,999,000	2,984,700	2,964,900	14,300	0.5%	34,100	1.2%
Goods Producing	554,000	551,900	548,500	2,100	0.4%	5,500	1.0%
..Mining and Logging	80,900	80,100	78,200	800	1.0%	2,700	3.5%
...Oil and Gas Extraction	38,200	37,900	37,100	300	0.8%	1,100	3.0%
...Support Activities for Mining	41,000	40,700	39,700	300	0.7%	1,300	3.3%
..Construction	233,700	233,300	232,000	400	0.2%	1,700	0.7%
..Construction of Buildings	60,700	60,200	59,700	500	0.8%	1,000	1.7%
..Heavy and Civil Engineering Construction	56,000	56,100	55,200	-100	-0.2%	800	1.4%
..Specialty Trade Contractors	117,000	117,000	117,100	0	0.0%	-100	-0.1%
..Manufacturing	239,400	238,500	238,300	900	0.4%	1,100	0.5%
..Durable Goods	147,900	146,900	148,300	1,000	0.7%	-400	-0.3%
...Fabricated Metal Product Manufacturing	54,100	53,800	53,800	300	0.6%	300	0.6%
...Machinery Manufacturing	40,100	39,900	40,100	200	0.5%	0	0.0%
....Agriculture, Construction, and Mining Machinery Mfg.	20,100	20,000	20,500	100	0.5%	-400	-2.0%
...Computer and Electronic Product Manufacturing	14,200	14,100	14,100	100	0.7%	100	0.7%
..Non-Durable Goods	91,500	91,600	90,000	-100	-0.1%	1,500	1.7%
...Petroleum and Coal Products Manufacturing	8,100	8,100	8,000	0	0.0%	100	1.3%
...Chemical Manufacturing	43,500	43,900	42,800	-400	-0.9%	700	1.6%
Service Providing	2,916,200	2,903,900	2,881,300	12,300	0.4%	34,900	1.2%
..Private Service Providing	2,445,000	2,432,800	2,416,400	12,200	0.5%	28,600	1.2%
..Trade, Transportation, and Utilities	699,800	698,700	689,400	1,100	0.2%	10,400	1.5%
...Wholesale Trade	181,400	180,900	177,800	500	0.3%	3,600	2.0%
....Merchant Wholesalers, Durable Goods	112,900	112,600	111,000	300	0.3%	1,900	1.7%
....Prof. and Commercial Equip. Supplies Wholesalers	18,200	18,100	18,300	100	0.6%	-100	-0.5%
....Merchant Wholesalers, Nondurable Goods	55,800	56,100	55,200	-300	-0.5%	600	1.1%
...Retail Trade	321,100	320,000	318,900	1,100	0.3%	2,200	0.7%
....Motor Vehicle and Parts Dealers	45,700	45,700	44,600	0	0.0%	1,100	2.5%
....Bldg. Material and Garden Equip. and Supplies Dealers	24,100	23,900	24,900	200	0.8%	-800	-3.2%
....Food and Beverage Stores	78,100	77,800	77,100	300	0.4%	1,000	1.3%
....Health and Personal Care Stores	62,200	62,200	62,300	0	0.0%	-100	-0.2%
....Clothing and Clothing Accessories Stores	20,300	20,300	20,300	0	0.0%	0	0.0%
....General Merchandise Stores	41,900	41,900	42,000	0	0.0%	-100	-0.2%
....Department Stores	21,600	21,600	21,800	0	0.0%	-200	-0.9%
....Other General Merchandise Stores	24,700	24,800	24,300	-100	-0.4%	400	1.6%
...Transportation, Warehousing, and Utilities	197,300	197,800	192,700	-500	-0.3%	4,600	2.4%
....Utilities	24,800	24,800	23,900	0	0.0%	900	3.8%
....Air Transportation	21,900	21,900	21,900	0	0.0%	0	0.0%
....Truck Transportation	31,100	31,100	30,600	0	0.0%	500	1.6%
....Pipeline Transportation	14,400	14,400	13,700	0	0.0%	700	5.1%
..Information	29,100	29,200	30,200	-100	-0.3%	-1,100	-3.6%
...Telecommunications	10,500	10,400	11,300	100	1.0%	-800	-7.1%
..Financial Activities	181,100	181,100	180,700	0	0.0%	400	0.2%
...Finance and Insurance	116,900	117,100	117,000	-200	-0.2%	-100	-0.1%
....Credit Intermediation and Related Activities	46,100	46,300	46,200	-200	-0.4%	-100	-0.2%
....Depository Credit Intermediation	30,800	30,900	30,800	-100	-0.3%	0	0.0%
....Securities, Commodity Contracts, and Fin. Investments	21,400	21,400	21,200	0	0.0%	200	0.9%
....Insurance Carriers and Related Activities	49,400	49,400	49,600	0	0.0%	-200	-0.4%
...Real Estate and Rental and Leasing	64,200	64,000	63,700	200	0.3%	500	0.8%
..Professional and Business Services	562,500	556,900	561,800	5,600	1.0%	700	0.1%
...Professional, Scientific, and Technical Services	284,700	282,800	279,800	1,900	0.7%	4,900	1.8%
....Legal Services	33,600	33,300	32,400	300	0.9%	1,200	3.7%
....Accounting, Tax Preparation, Bookkeeping, and Payroll	28,700	28,700	29,300	0	0.0%	-600	-2.0%
....Architectural, Engineering, and Related Services	79,400	78,200	75,300	1,200	1.5%	4,100	5.4%
....Computer Systems Design and Related Services	42,800	42,400	43,900	400	0.9%	-1,100	-2.5%
...Management of Companies and Enterprises	46,800	46,900	47,600	-100	-0.2%	-800	-1.7%
...Admin. and Support and Waste Mgmt. and Remediation	231,000	227,200	234,400	3,800	1.7%	-3,400	-1.5%
....Administrative and Support Services	218,100	214,500	221,600	3,600	1.7%	-3,500	-1.6%
....Employment Services	76,900	74,900	79,800	2,000	2.7%	-2,900	-3.6%
....Services to Buildings and Dwellings	57,400	55,900	56,100	1,500	2.7%	1,300	2.3%
..Educational and Health Services	468,600	466,800	458,600	1,800	0.4%	10,000	2.2%
...Educational Services	72,900	72,900	72,700	0	0.0%	200	0.3%
...Health Care and Social Assistance	395,700	393,900	385,900	1,800	0.5%	9,800	2.5%
....Ambulatory Health Care Services	199,400	198,300	194,100	1,100	0.6%	5,300	2.7%
....Hospitals	100,700	100,700	98,100	0	0.0%	2,600	2.7%
..Leisure and Hospitality	368,100	364,200	365,100	3,900	1.1%	3,000	0.8%
...Arts, Entertainment, and Recreation	41,900	41,700	40,500	200	0.5%	1,400	3.5%
...Accommodation and Food Services	326,200	322,500	324,600	3,700	1.1%	1,600	0.5%
....Accommodation	28,000	27,800	27,500	200	0.7%	500	1.8%
....Food Services and Drinking Places	298,200	294,700	297,100	3,500	1.2%	1,100	0.4%
..Other Services	135,800	135,900	130,600	-100	-0.1%	5,200	4.0%
Government	471,200	471,100	464,900	100	0.0%	6,300	1.4%
..Federal Government	37,700	37,500	36,800	200	0.5%	900	2.4%
..State Government	102,000	100,800	98,500	1,200	1.2%	3,500	3.6%
...State Government Educational Services	55,400	54,600	54,100	800	1.5%	1,300	2.4%
..Local Government	323,300	329,200	321,800	-5,900	-1.8%	1,500	0.5%
...Local Government Educational Services	220,400	225,200	222,400	-4,800	-2.1%	-2,000	-0.9%