Workforce Solutions

Houston Area Employment Situation

November 2022

CURRENT EMPLOYMENT AND LOCAL AREA UNEMPLOYMENT STATISTICS

Job Growth Continues, Interest Rate Sensitive Industries Falter, and Labor Market Fatigue Sets in

Total Nonfarm

Over-the-month Change

Houston MSA Total Nonfarm employment stood at 3,337,000 in November, up 14,500 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 33,300 jobs. Between 2005 and 2019 prior to the pandemic, historically in the month of November, Total Nonfarm has on average added 15,000 jobs over the month, which indicates that this month's gains are in line with this recent average.
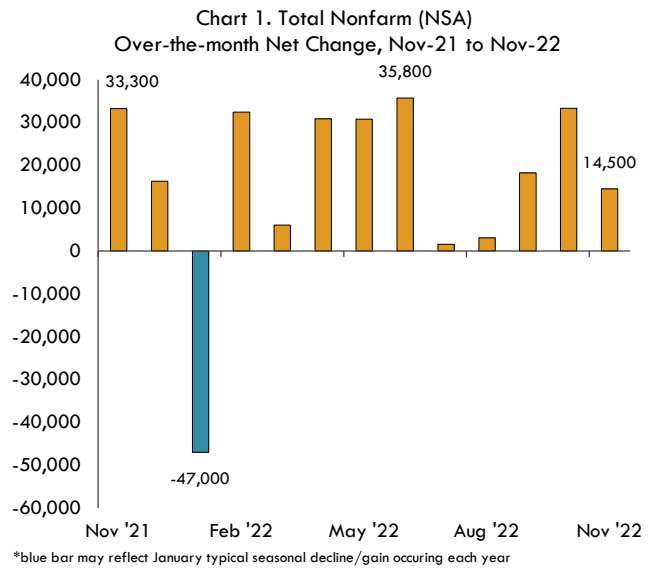
The primary drivers of this November's growth were increases in Trade, Transportation, and Utilities; Leisure and Hospitality; and Government. Gains were also recorded in Education and Health Services; Manufacturing; and Mining and Logging. The net increase in jobs over the month was partially offset by losses in Construction; Other Services; and Financial Activities. (see Chart 2). Houston MSA Total Nonfarm (seasonally adjusted) employment stood at 3,309,200, up 2,200 jobs over the month, or 0.1 percent vs. a historical average of 4,400. This November marks 21 consecutive month-over-month gains on a seasonally-adjusted basis. All analysis pertains to not-seasonally adjusted data unless otherwise noted. Data source: BLS/TWC.

> **Top-3 Drivers of Over-the-month Job Growth in November**
> • Trade, Transportation, and Utilities: 10,900
> • Leisure and Hospitality: 3,700
> • Government: 3,600

Over-the-year Change

Over the year, Total Nonfarm employment was up 176,300 or 5.6 percent on a not-seasonally-adjusted basis and up 175,100 or 5.6 percent on a seasonally-adjusted basis (see NSA Chart 3). To compare, November 2021 saw a year-over-year gain of 143,900 jobs (NSA) from November 2020. This was the largest November over-the-year increase on record. Currently 10 out of 11 sectors show growth year over year of which the top-three are Leisure and Hospitality (49,800); Professional and

Chart 1. Total Nonfarm (NSA) Over-the-month Net Change, Nov-21 to Nov-22

*blue bar may reflect January typical seasonal decline/gain occuring each year

Business Services (31,800); and Trade, Transportation, and Utilities (26,400) (see Chart 4). Total Nonfarm employment not-seasonally-adjusted now exceeds its February 2020 pre-pandemic level of 3,192,200 jobs by 144,800, or 4.5 percent (109,000 jobs, 3.4 percent above 3,200,200 seasonally adjusted).

Chart 2. Over-the-month Net Change, Houston MSA Supersectors, November 2022

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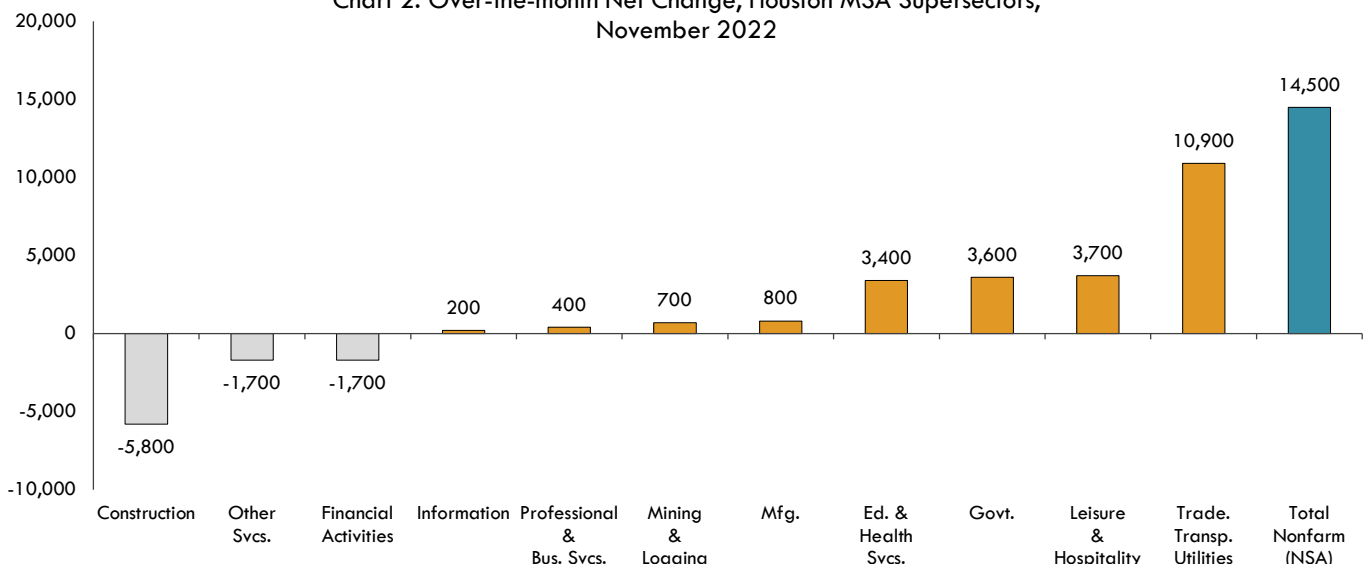
Previous Month's Revisions

Total Nonfarm employment was revised upward by 1,000 jobs for a September to October larger net gain of 33,400 compared to an original estimate of 32,400 jobs. An upward revision of +2,100 jobs in Leisure and Hospitality was the largest contributor followed by Education and Health Services (+800) and Financial Activities (+700). Downward revisions in Manufacturing (-1,000), Construction (-1,000), and Trade, Transportation, and Utilities (-800) provided a partial offset of the overall upward revision to Total Nonfarm employment (see Chart 5).

> Top-3 Drivers of Over-the-year Job Growth in November
> • Leisure and Hospitality: 49,800
> • Professional and Business Services: 31,800
> • Trade, Transportation, and Utilities: 26,400

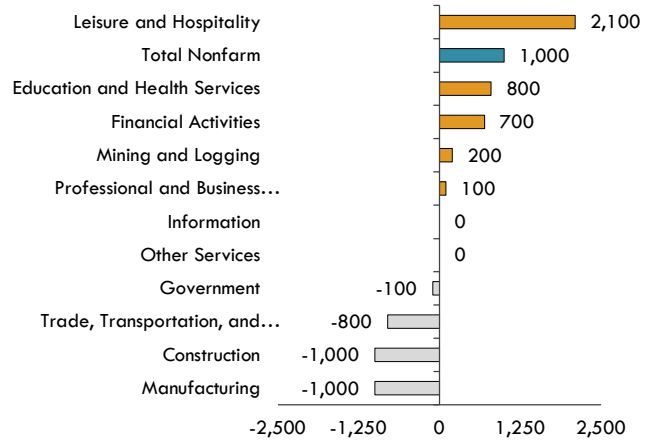**Chart 5. Net Revisions for Selected Supersectors and Major Industries, October 2022**

Supersector/Industry	Net Revision
Leisure and Hospitality	2,100
Total Nonfarm	1,000
Education and Health Services	800
Financial Activities	700
Mining and Logging	200
Professional and Business...	100
Information	0
Other Services	0
Government	-100
Trade, Transportation, and...	-800
Construction	-1,000
Manufacturing	-1,000

Chart 3. Total Nonfarm (NSA) Over-the-year Net Change, Nov-07 to Nov-22

- Nov-07: 96,200
- Nov-09: -114,400
- Dec-14: 116,700
- Oct-16: -7,800
- Jan-19: 89,300
- Feb-20: 58,700
- Apr-20: -311,700
- Jun-22: 204,200
- Nov-22: 176,300

Legend:
- NBER National Recession
- Shale Bust
- Total Nonfarm
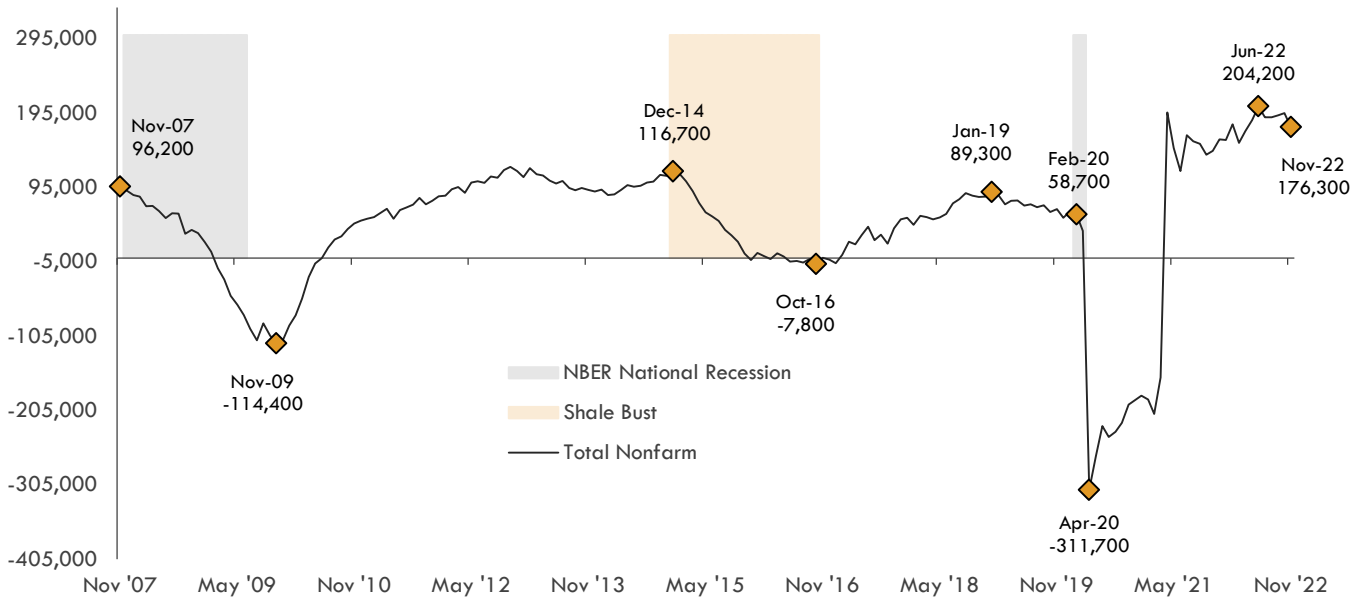
Chart 4. Over-the-year Net Change, Houston MSA Supersectors, November 2021 to November 2022

Supersector	Net Change
Total Nonfarm	176,300
Leisure and Hospitality	49,800
Professional and Business Services	31,800
Trade, Transportation, and Utilities	26,400
Construction	18,500
Education and Health Services	18,400
Manufacturing	12,200
Mining and Logging	7,700
Financial Activities	7,000
Government	5,800
Information	1,700
Other Services	-3,000

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Supplemental Commentary

Overall Impressions

November over-the-month job growth in Houston either came in at expectations with an increase of 14,500 (not-seasonally-adjusted) or was moderately underwhelming compared to historical averages with 2,200 jobs (seasonally-adjusted). Barring an even weaker December yet to be published, this November's seasonally-adjusted figure marks the weakest month for job growth this year. However it's worth keeping in mind that growth between January and October averaged nearly 16,000 jobs for a level of performance that would be hard to match even in an environment without growing recession fears. Unfortunately, the lack of seasonally-adjusted data by industry sector, prevents us from determining the exact source of November's weakness though a look at not-seasonally-adjusted figures by industry below may provide some clues.

Trade, Transportation, and Utilities, which includes Retail Trade comprising nearly 50 percent of employment in this supersector, added 10,900 job over the month (NSA). In the context of the last 30 years this level of growth appears respectable but from 2011 onward with an average of roughly 14,000, this November's increase leaves something to be desired. While one component of TTU, Wholesale Trade, lost -600 jobs the main culprit was Retail, which added only 6,400 jobs over the month. This was the smallest November gain for Retail since 2009 and given that November tends to be the best month for Retail due to the holiday season, its lackluster performance this year may signal a return to slower growth in this sector seen prior to the pandemic given the continued growth of online shopping.
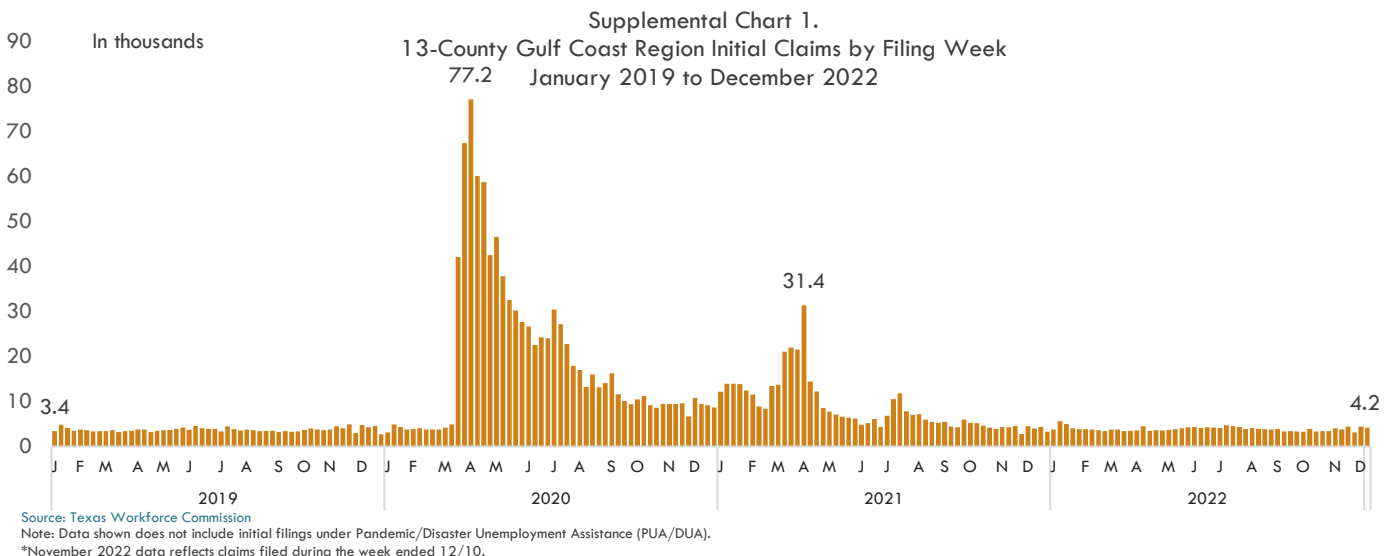
In contrast, Leisure and Hospitality, i.e. bars, restaurants, and hotels, saw its best November on record with 3,700 jobs added over the month suggesting that pent-up demand for outside dining in particular continues to drive relative strength in this sector. Other sectors such as Education and Healthcare (referring to private education here) and Government (referring to public education) both performed well and within plausible ranges given November-specific gains in recent years.

However, two sectors likely to be most sensitive to rising interest rates, Construction and Financial Activities posted sizable losses in November with the former shedding -5,800 jobs and the latter -1,700. Both figures were these sectors largest respective November declines since records began in 1990. In the case of Construction, November marks three consecutive months of losses reaching a cumulative decline of -10,300 jobs. This period of losses stands in contrast to seven uninterrupted months of gains between February and August of this year totaling 31,700 jobs. A final consequence of November's losses is that total employment in Construction has once again fallen below February 2020 pre-pandemic levels resulting in the 1.1 percent surplus from October morphing into a -1.8 percent deficit. With the Federal Reserve's recent declared aim of terminal interest rates at around five percent, these two sectors are likely to remain under pressure throughout 2023. Furthermore, Houston area total job growth across all sectors collectively is now more likely to fall between the high forecast for the end of 2023 of 62,000 jobs added over the year and the mid forecast of 36,000 with more potential downside should rates continue to climb towards six percent. (See Supplemental Chart 4.)

Initial claims for unemployment insurance remain around 4,000 or so each week failing to signal any significant change in trend. Breaching 5,000 claims per week, a level last seen in January of this, and sustaining above this level will likely be an early indicator of a meaningful pickup in layoffs across the region. (See Supplemental Chart 1.)

The Workforce Solutions Index posted its fourth consecutive month-over-month decline. The internals of the index indicate that the number of job postings has begun to stagnate if not decline somewhat while the number of unemployed individuals continues to fall by a much smaller amount. November's reading of 5.7 still indicates that jobseekers retain the upper hand however the recent series of declines seem to reflect "labor market fatigue" as it reaches the late stages of a period characterized by tremendous rebound growth post-pandemic. (See page 19 of this report.)

The "Reverse Tug-o-War" charts showing the number of employers, increasing, maintaining, or decreasing the number of job postings showed that all but a handful of sectors saw more employers pulling ads than posting new ones over the 30-day over 30-day window and all sectors showing this 90-days over 90 days again seeming to reconfirm that the appetite for hiring continues to weaken as we close out 2022. (See Supplemental Charts 2 and 3.)
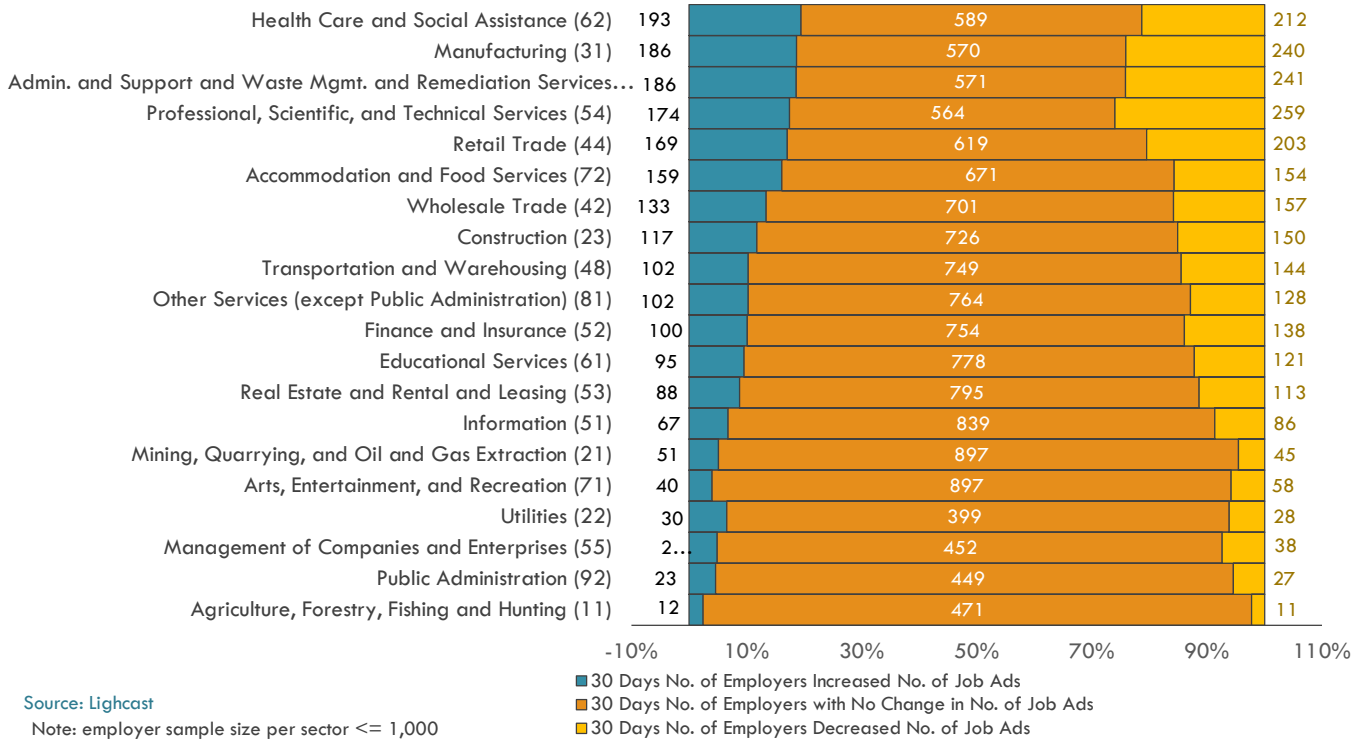
Supplemental Chart 1.
13-County Gulf Coast Region Initial Claims by Filing Week
January 2019 to December 2022

Source: Texas Workforce Commission
Note: Data shown does not include initial filings under Pandemic/Disaster Unemployment Assistance (PUA/DUA).
*November 2022 data reflects claims filed during the week ended 12/10.

❄ Here's wishing you happy holidays! ❄
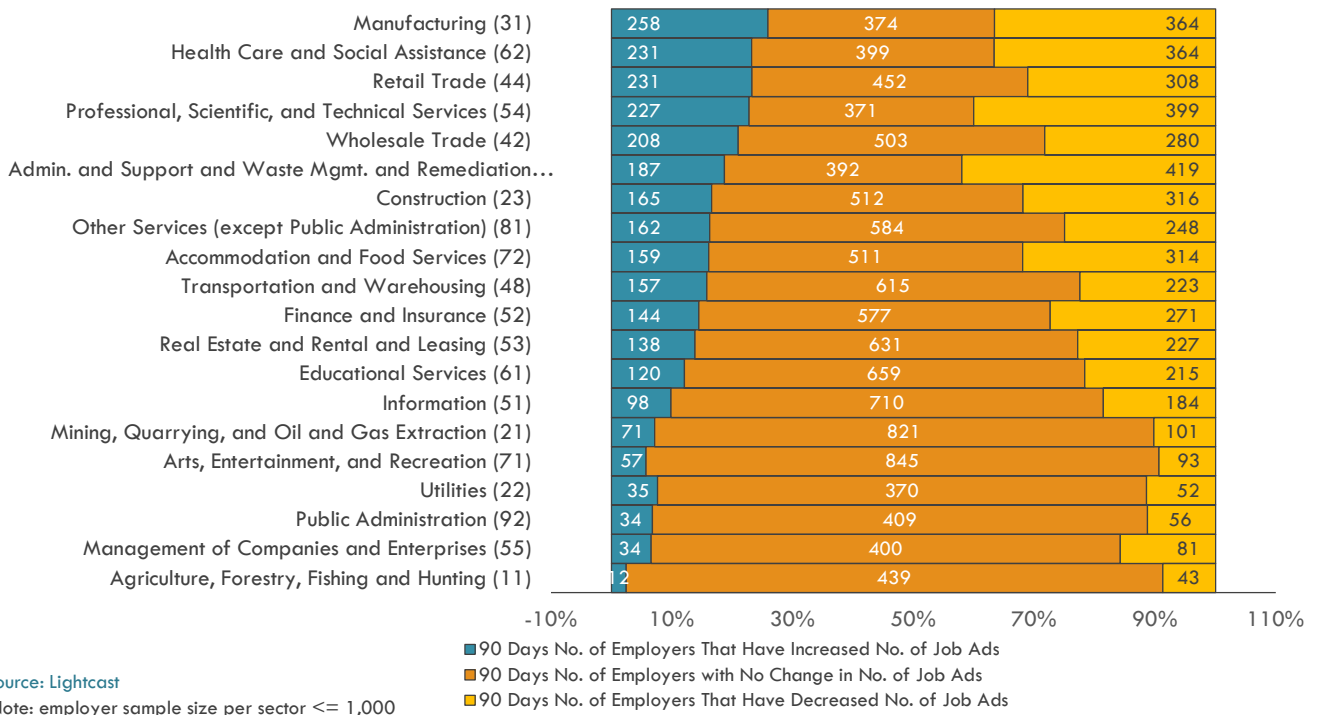
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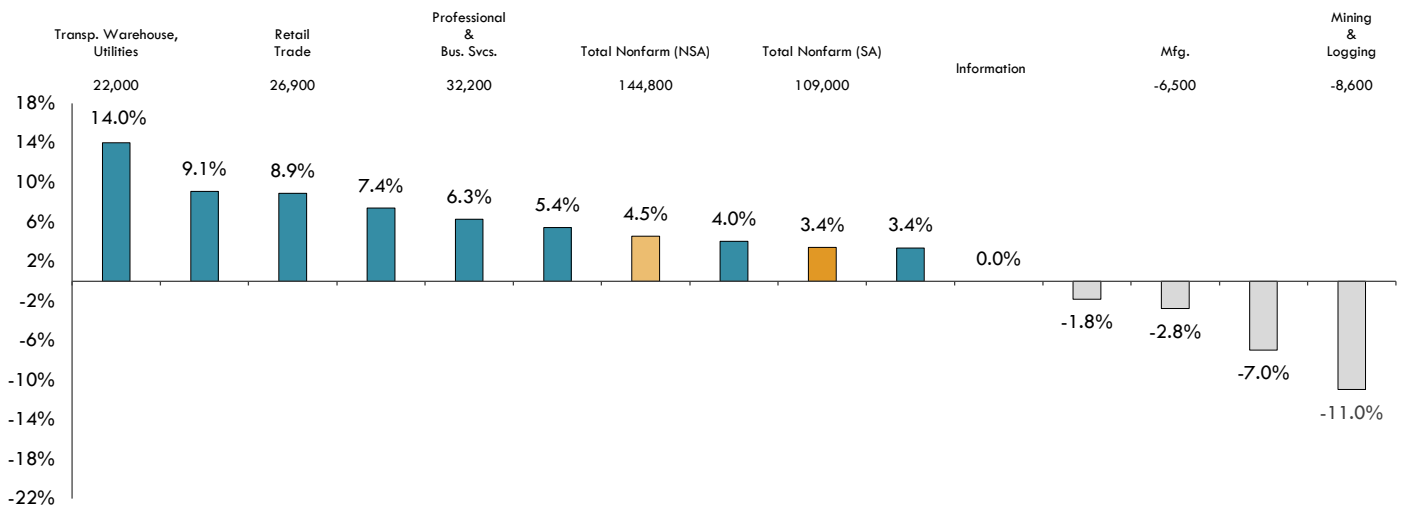
Supplemental Commentary (continued)

Supplemental Chart 2. Gulf Coast Region 30 - Days over 30 - Days Count of Employers Increasing or Decreasing Job Ads by Sector
(December, 18 2022 to November, 18 2022 over November, 17 2022 to October, 18 2022)

Sector	Increased	No Change	Decreased
Health Care and Social Assistance (62)	193	589	212
Manufacturing (31)	186	570	240
Admin. and Support and Waste Mgmt. and Remediation Services…	186	571	241
Professional, Scientific, and Technical Services (54)	174	564	259
Retail Trade (44)	169	619	203
Accommodation and Food Services (72)	159	671	154
Wholesale Trade (42)	133	701	157
Construction (23)	117	726	150
Transportation and Warehousing (48)	102	749	144
Other Services (except Public Administration) (81)	102	764	128
Finance and Insurance (52)	100	754	138
Educational Services (61)	95	778	121
Real Estate and Rental and Leasing (53)	88	795	113
Information (51)	67	839	86
Mining, Quarrying, and Oil and Gas Extraction (21)	51	897	45
Arts, Entertainment, and Recreation (71)	40	897	58
Utilities (22)	30	399	28
Management of Companies and Enterprises (55)	2…	452	38
Public Administration (92)	23	449	27
Agriculture, Forestry, Fishing and Hunting (11)	12	471	11

Source: Lightcast
Note: employer sample size per sector <= 1,000

- ■ 30 Days No. of Employers Increased No. of Job Ads
- ■ 30 Days No. of Employers with No Change in No. of Job Ads
- ■ 30 Days No. of Employers Decreased No. of Job Ads

Supplemental Chart 3. Gulf Coast Region 90-Days over 90-Days Count of Employers Adding or Reducing Job Ads by Sector

Sector	Increased	No Change	Decreased
Manufacturing (31)	258	374	364
Health Care and Social Assistance (62)	231	399	364
Retail Trade (44)	231	452	308
Professional, Scientific, and Technical Services (54)	227	371	399
Wholesale Trade (42)	208	503	280
Admin. and Support and Waste Mgmt. and Remediation…	187	392	419
Construction (23)	165	512	316
Other Services (except Public Administration) (81)	162	584	248
Accommodation and Food Services (72)	159	511	314
Transportation and Warehousing (48)	157	615	223
Finance and Insurance (52)	144	577	271
Real Estate and Rental and Leasing (53)	138	631	227
Educational Services (61)	120	659	215
Information (51)	98	710	184
Mining, Quarrying, and Oil and Gas Extraction (21)	71	821	101
Arts, Entertainment, and Recreation (71)	57	845	93
Utilities (22)	35	370	52
Public Administration (92)	34	409	56
Management of Companies and Enterprises (55)	34	400	81
Agriculture, Forestry, Fishing and Hunting (11)	12	439	43

Source: Lightcast
Note: employer sample size per sector <= 1,000

- ■ 90 Days No. of Employers That Have Increased No. of Job Ads
- ■ 90 Days No. of Employers with No Change in No. of Job Ads
- ■ 90 Days No. of Employers That Have Decreased No. of Job Ads

Supplemental Chart 4. Houston MSA Current Employment Levels as of November 2022
Relative to February 2020 by Sector (NSA)

Sector	Level	Percent
Transp. Warehouse, Utilities	22,000	14.0%
		9.1%
Retail Trade	26,900	8.9%
Professional & Bus. Svcs.	32,200	7.4%
		6.3%
		5.4%
Total Nonfarm (NSA)	144,800	4.5%
		4.0%
Total Nonfarm (SA)	109,000	3.4%
		3.4%
Information		0.0%
		-1.8%
Mfg.	-6,500	-2.8%
		-7.0%
Mining & Logging	-8,600	-11.0%

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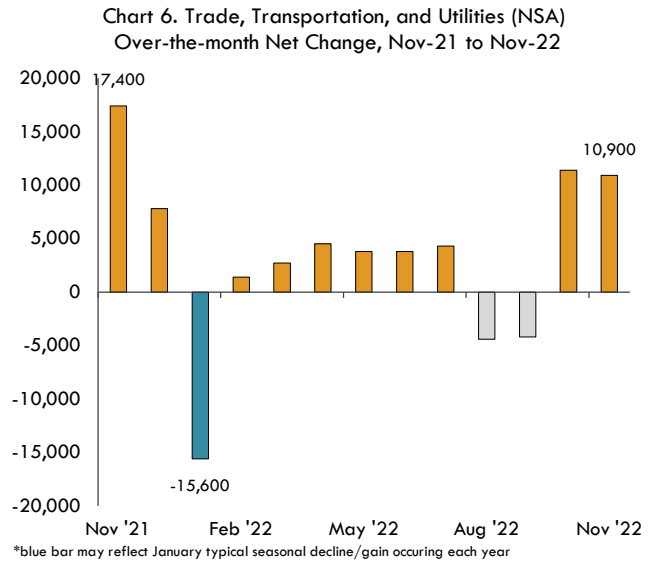
GAINING INDUSTRY HIGHLIGHTS

Trade, Transportation, and Utilities

Over-the-month Change

Trade, Transportation, and Utilities was the largest gaining sector over the month up 10,900 jobs, or 1.6 percent (see Chart 6). Historically in the month of November, Trade, Transportation, and Utilities has added an average of 9,300 jobs over the month, which indicates that this month's gains are slightly above the long-term average. Retail Trade was the largest contributor to the overall sector's increase, up 6,400 jobs over the month. The second-largest contributor was Transportation, Warehousing, and Utilities, which added 5,100 jobs from October to November. Lastly, Wholesale Trade offset a portion of the sector's gains with a loss of -600 jobs.

Chart 6. Trade, Transportation, and Utilities (NSA)
Over-the-month Net Change, Nov-21 to Nov-22

blue bar may reflect January typical seasonal decline/gain occuring each year

Over-the-year Change

Year over year, Trade, Transportation, and Utilities was up 26,400 jobs, or 4.0 percent (see Chart 7). This was the second-largest over-the-year gain in the month of November since records began in 1990. It also marks 20 consecutive months of over-the-year gains. Furthermore, 14.7 percent of total (gross) jobs added across the region over the past year can be attributed to Trade, Transportation, and Utilities. Wholesale Trade was the largest contributor to the overall sector's increase, up 14,300 jobs over the year. The second-largest contributor was Retail Trade, which added 9,900 jobs from November a

year ago. Lastly, Transportation, Warehousing, and Utilities contributed, 2,200 jobs. Total Trade, Transportation, and Utilities employmnent (NSA) now exceeds its February 2020 pre-pandemic level of 628,900 jobs by 58,100, or 9.2 percent. At the same time, the sector's share of Houston area Total Nonfarm Employment has fallen from 20.9 percent to 20.6 percent over the past year.

Chart 7. Trade, Transportation, and Utilities (NSA)
Over-the-year Net Change, Nov-07 to Nov-22
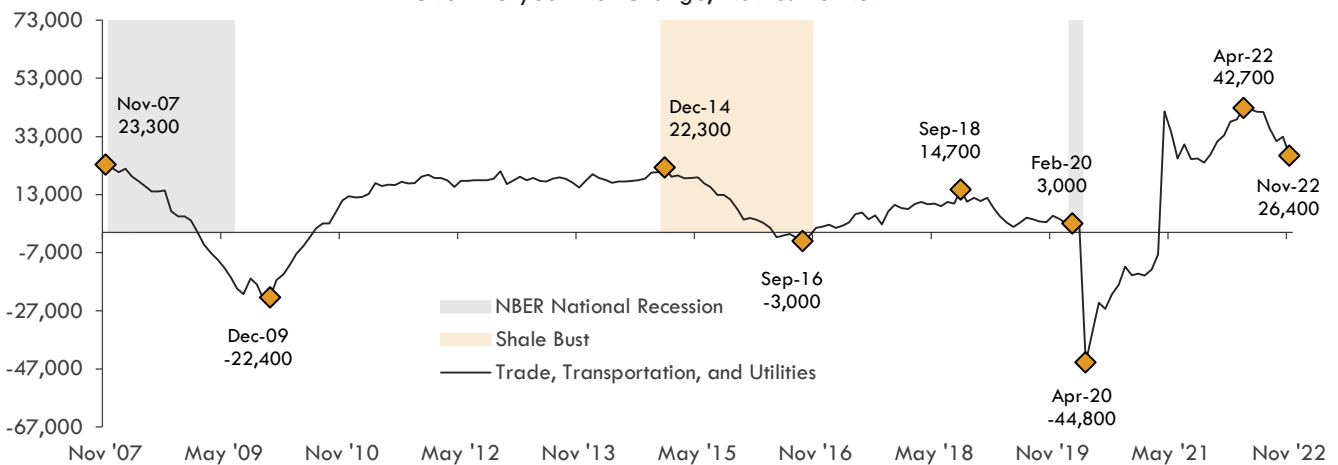
About This Sector

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 48 percent (see Chart 8). Across the Houston MSA, the concentration of jobs in the overall sector is 9 percent higher than the national average, due to a 41-percent higher concentration in Wholesale Trade primarily related to the oil and gas industry.

Chart 8. Employment in Component Industries of Trade, Transportation, and Utilities Sector - November 2022

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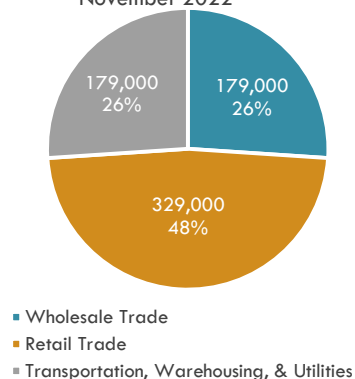
GAINING INDUSTRY HIGHLIGHTS

Leisure and Hospitality

Over-the-month Change

Leisure and Hospitality was the second-largest gaining sector over the month up 3,700 jobs, or 1.0 percent (see Chart 9). This was the largest-ever gain in the month of November since records began in 1990, beating the previous November record of 3,000 jobs in 2020. Historically in the month of November, Leisure and Hospitality has added an average of 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 3,100 jobs over the month. The second-largest contributor was Arts, Entertainment, and Recreation, which added 600 jobs from October to November. Leisure and Hospitality employment was revised upward by 2,100 jobs for a September to October complete erasure of losses resulting in a net gain of 1,500 compared to an original estimate of -600 jobs.

Chart 9. Leisure and Hospitality (NSA)
Over-the-month Net Change, Nov-21 to Nov-22

*blue bar may reflect January typical seasonal decline/gain occuring each year
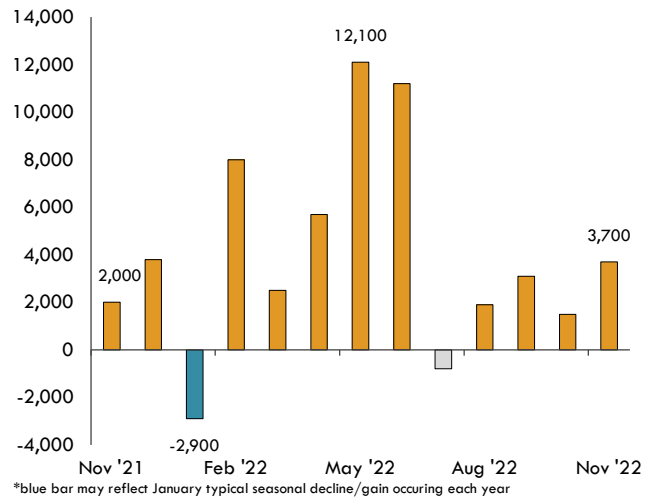
Over-the-year Change

Year over year, Leisure and Hospitality was up 49,800 jobs, or 15.8 percent (see Chart 10). This was the largest November over-the-year increase on record and the largest gain since August 2021's increase of 54,300 jobs. It also marks 20 consecutive months of over-the-year gains. Among sectors currently showing growth, this sector is the fastest-growing in percentage terms across the Houston area. Furthermore, 27.8 percent of total (gross) jobs added across the region over the past year can be attributed to Leisure and Hospitality. Accommodation and Food Services was the largest contributor to the overall sector's increase, up 42,100 jobs over the year. The second-largest contributor was Arts, Entertainment, and Recreation, which added 7,700 jobs from November a year ago. Total Leisure and Hospitality employmnent (NSA) now exceeds its February 2020 pre-pandemic level of 334,500 jobs by 30,400, or 9.1 percent. At the same time, the sector's share of Houston area Total Nonfarm Employment has risen from 10.0 percent to 10.9 percent over the past year.

Chart 10. Leisure and Hospitality (NSA)
Over-the-year Net Change, Nov-07 to Nov-22
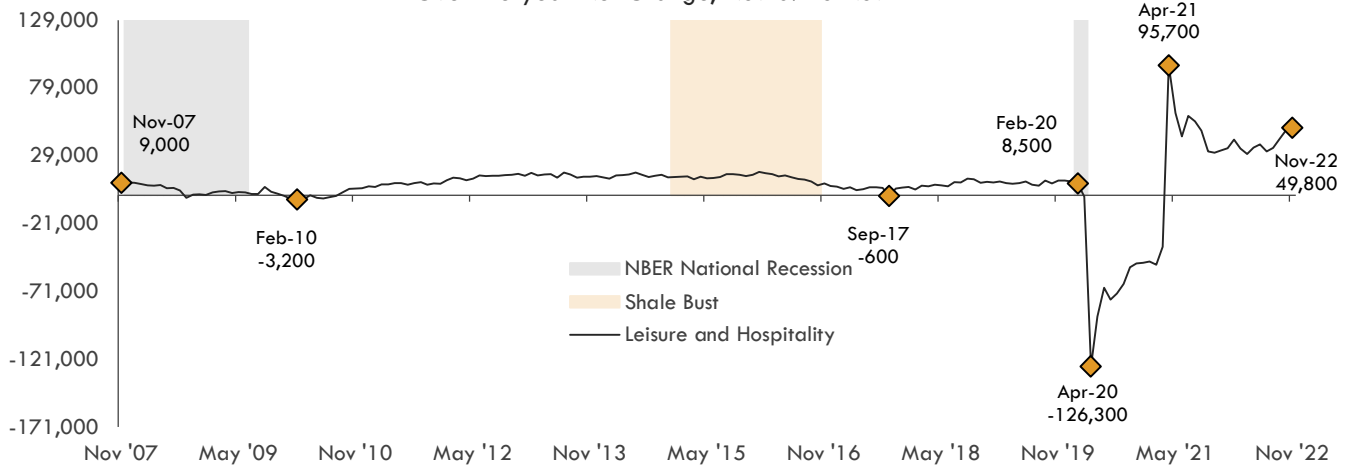
About This Sector

This sector is composed of establishments that produce and promote in live performances, events, of 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 90 percent (see Chart 11). Across the Houston MSA, the concentration of jobs in the overall sector is 7 percent higher than the national average.

Chart 11. Employment in Component Industries of
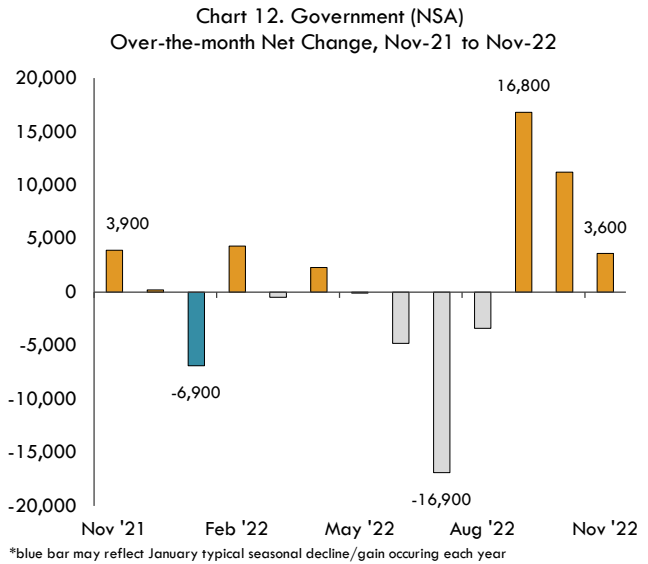Leisure and Hospitality Sector - November 2022

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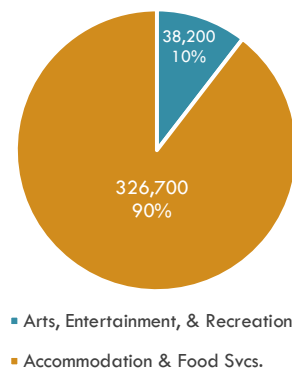
GAINING INDUSTRY HIGHLIGHTS

Government

Over-the-month Change

Government was the third-largest gaining sector over the month up 3,600 jobs, or 0.8 percent (see Chart 12). Historically in the month of November, Government has added an average of 2,300 jobs over the month, which indicates that this month's gains are substantially above the long-term average. Local Government was the largest contributor to the overall sector's increase, up 2,900 jobs over the month. The second-largest contributor was State Government, which added 600 jobs from October to November. Lastly, Federal Government contributed, 100 jobs. Government employment was revised downward by -100 jobs for a September to October smaller net gain of 11,200 compared to an original estimate of 11,300 jobs.

Chart 12. Government (NSA)
Over-the-month Net Change, Nov-21 to Nov-22

blue bar may reflect January typical seasonal decline/gain occuring each year

Over-the-year Change

Year over year, Government was up 5,800 jobs, or 1.3 percent (see Chart 13). This November also marks 20 consecutive months of over-the-year gains. Local Government was the largest contributor to the overall sector's increase, up 3,800 jobs over the year. The second-largest contributor was State Government, which added 1,900 jobs from November a year ago. Lastly, Federal Government contributed, 100 jobs. Total Government employmnent (NSA) now exceeds its February 2020 pre-pandemic level of 428,400 jobs by 14,400, or 3.4 percent. At the same time, the sector's share of Houston area Total Nonfarm

Employment has fallen from 13.8 percent to 13.3 percent over the past year.

Chart 13. Government (NSA)
Over-the-year Net Change, Nov-07 to Nov-22
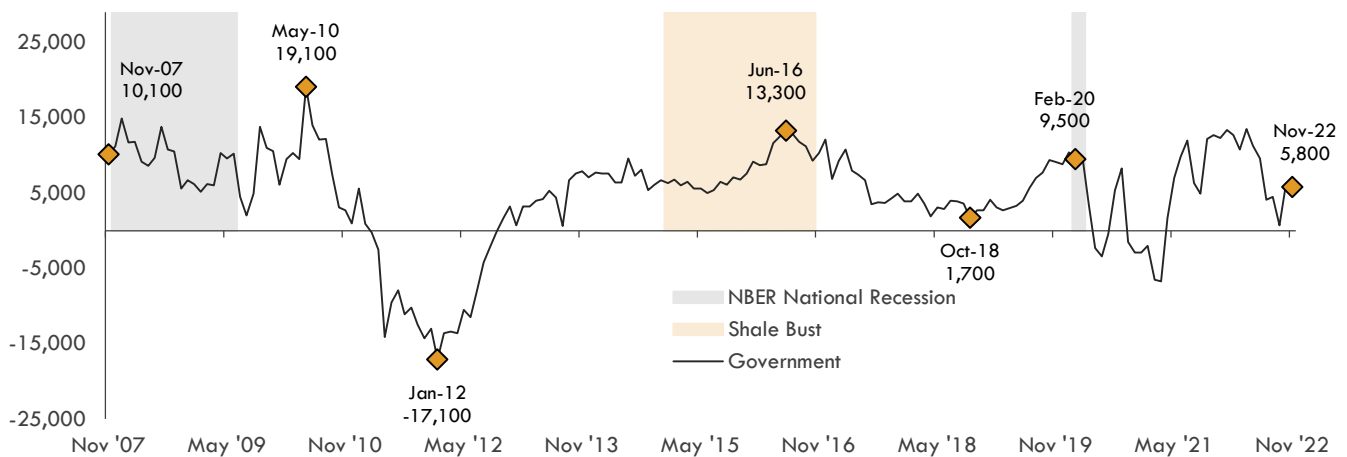
About This Sector

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 71 percent (see Chart 14). Across the Houston MSA, the concentration of jobs in the overall Government sector is 10 percent less than the national average.

**Chart 14. Employment in Component Industries of Government Sector - November 2022**

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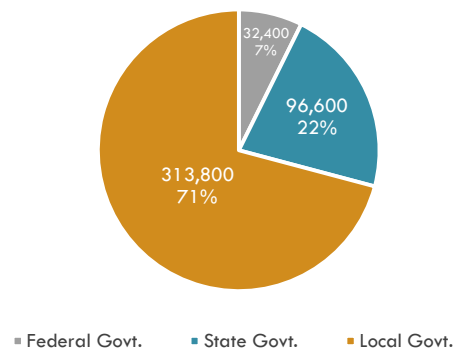
GAINING INDUSTRY HIGHLIGHTS

Education and Health Services

Over-the-month Change

Education and Health Services also saw an increase over the month up 3,400 jobs, or 0.8 percent (see Chart 15). This was the largest November gain since 2021 and the second-largest gain historically for the month of November since records began in 1990. Historically in the month of November, 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 2,600 jobs over the month. The second-largest contributor was Educational Services, which added 800 jobs from October to November. Education and Health Services employment was revised upward by 800 jobs for a September to October larger net gain of 3,900 compared to an original estimate of 3,100 jobs.

Chart 15. Education and Health Services (NSA) Over-the-month Net Change, Nov-21 to Nov-22

*blue bar may reflect January typical seasonal decline/gain occuring each year
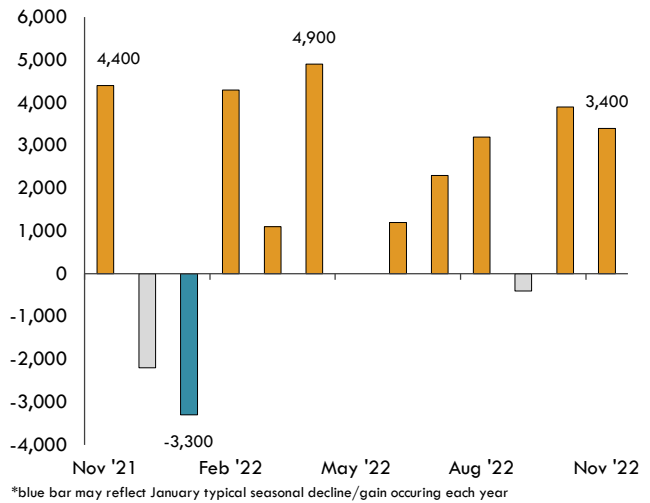
Over-the-year Change

Year over year, Education and Health Services was up 18,400 jobs, or 4.3 percent (see Chart 16). This was the second-largest over-the-year gain in the month of November since records began in 1990. It also marks 20 consecutive months of over-the-year gains. Health Care and Social Assistance was the largest contributor to the overall sector's increase, up 12,000 jobs over the year. The second-largest contributor was Educational Services, which added 6,400 jobs from November a year ago. Total Education and Health Services employmnent (NSA) now exceeds its February 2020 pre-pandemic level of 414,400 jobs

or 7.4 percent. At the same time, the sector's share of Houston area Total Nonfarm Employment has fallen from 13.5 percent to 13.3 percent over the past year.

Chart 16. Education and Health Services (NSA) Over-the-year Net Change, Nov-07 to Nov-22
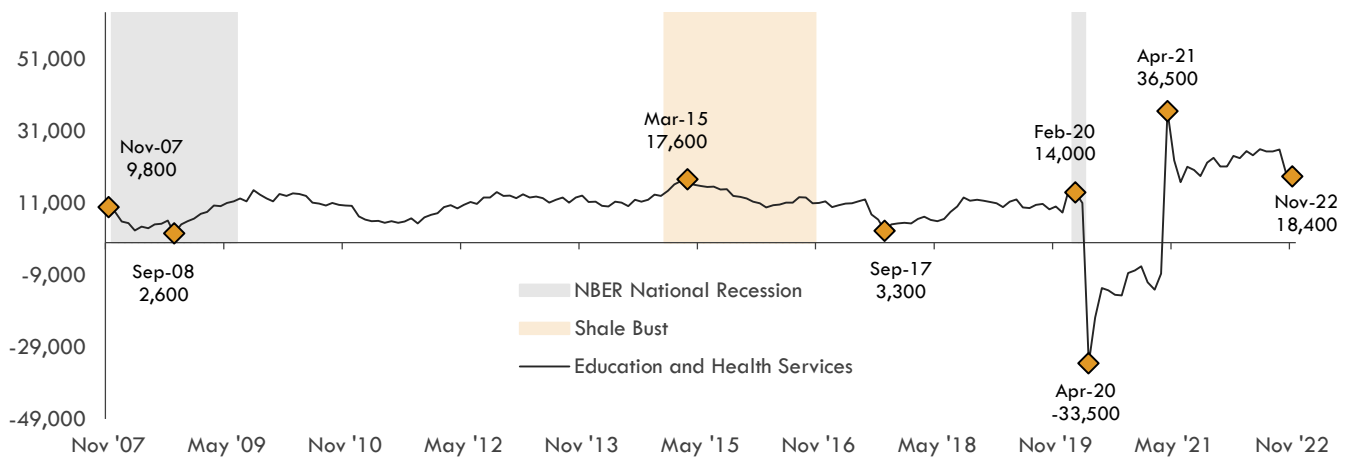
About This Sector

This sector is composed of establishments that provide private education services (i.e. excluding pubicly-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 83 percent (see Chart 17). Across the Houston MSA, the concentration of jobs in the overall sector is 18 percent less than the national average, despite the high physical concentration of healthcare jobs centered around Texas Medical Center.

Chart 17. Employment in Component Industries of Education and Health Services Sector - November 2022

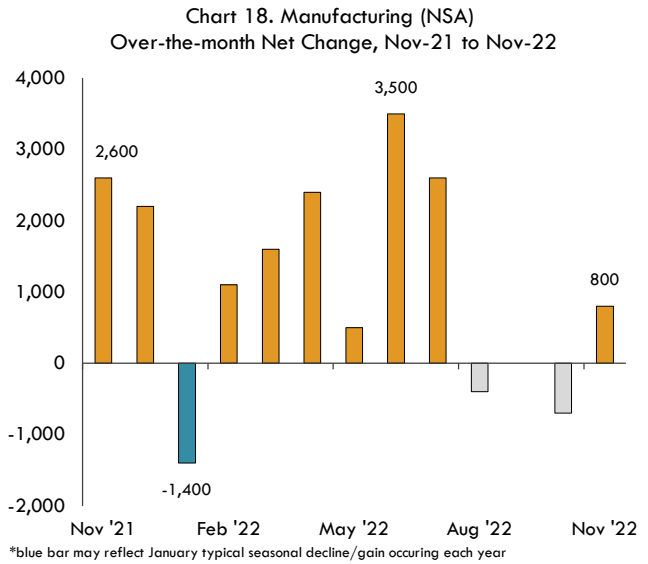■ Educational Svcs. ■ Health Care & Social Assistance

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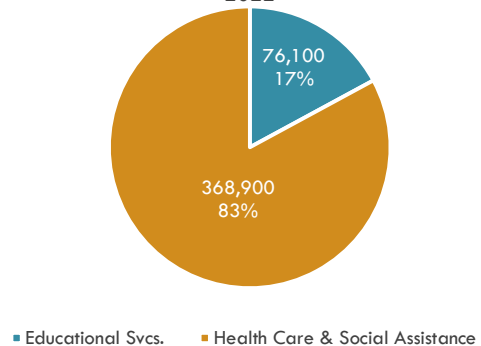
GAINING INDUSTRY HIGHLIGHTS

Manufacturing

Over-the-month Change

Manufacturing also saw an increase over the month up 800 jobs, or 0.4 percent (see Chart 18). Historically in the month of November, Manufacturing has added an average of 500 jobs over the month, which indicates that this month's gains are slightly above the long-term average. Non-Durable Goods was the largest contributor to the overall sector's increase, up 700 jobs over the month. The second-largest contributor was Durable Goods, which added 100 jobs from October to November. Manufacturing employment was revised downward by -1,000 jobs for a September to October complete erasure of gains leaving a net loss of -700 compared to an original estimate of 300 jobs.

Chart 18. Manufacturing (NSA)
Over-the-month Net Change, Nov-21 to Nov-22

blue bar may reflect January typical seasonal decline/gain occuring each year

Over-the-year Change

Year over year, Manufacturing was up 12,200 jobs, or 5.7 percent (see Chart 19). This November also marks 16 consecutive months of over-the-year gains. Durable Goods was the largest contributor to the overall sector's increase, up 7,900 jobs over the year. The second-largest contributor was Non-Durable Goods, which added 4,300 jobs from November a year ago. Total Manufacturing employmnent (NSA) remains -6,500 jobs, or -2.8 percent below its February 2020 pre-pandemic level of 234,500. 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 19. Manufacturing (NSA)
Over-the-year Net Change, Nov-07 to Nov-22
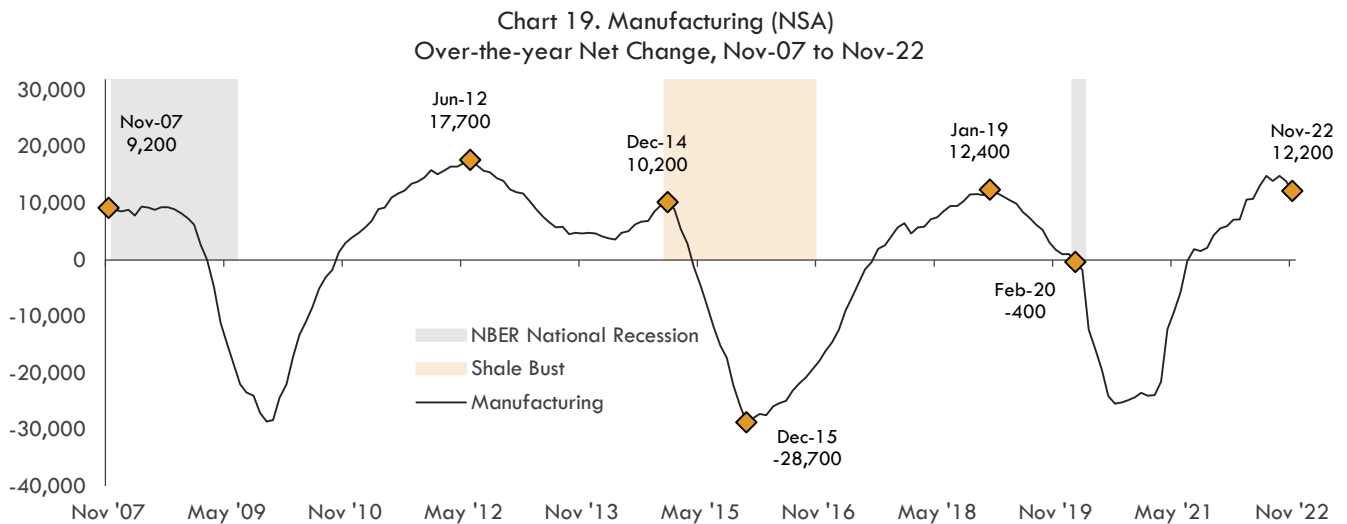
About This Sector

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). Across the Houston MSA, the concentration of jobs in the overall Manufacturing sector is 18 percent less than the national average.

Chart 20. Employment in Component Industries of Manufacturing Sector - November 2022
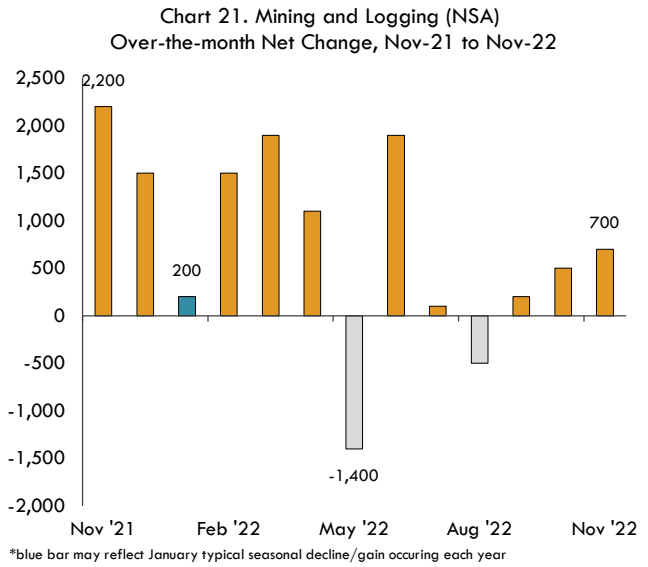
- Durable Goods Mfg.: 141,500 (62%)
- Nondurable Goods Mfg.: 86,500 (38%)

Workforce Solutions
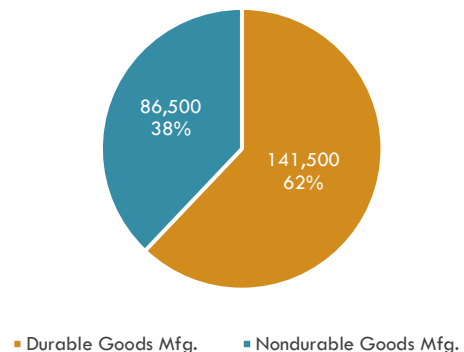
GAINING INDUSTRY HIGHLIGHTS

Mining and Logging

Over-the-month Change

Mining and Logging also saw an increase over the month up 700 jobs, or 1.0 percent (see Chart 21). This November tied with 1990 for the third-largest ever gain in the month of November since records began, which also happens to be 1990. Historically in the month of November, Mining and Logging has lost an average of -100 jobs over the month, which indicates that this month's gains are substantially in contrast to the long-term average decline. Support Activities for Mining was the largest contributor to the overall sector's increase, up 500 jobs over the month. The second-largest contributor was Oil and Gas Extraction, which added 300 jobs from October to November. Lastly, Other Mining and Logging Undefined offset a portion of the sector's gains with a loss of -100 jobs. Mining and Logging employment was revised upward by 200 jobs for a September to October larger net gain of 500 compared to an original estimate of 300 jobs.

**Chart 21. Mining and Logging (NSA)
Over-the-month Net Change, Nov-21 to Nov-22**

blue bar may reflect January typical seasonal decline/gain occuring each year

Over-the-year Change

Year over year, Mining and Logging was up 7,700 jobs, or 12.4 percent (see Chart 22). This was the third-largest over-the-year gain in November since records began in 1990. It also marks 13 consecutive months of over-the-year gains. 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 4,100 jobs over the year. The second-largest contributor was Oil and Gas Extraction, which added 3,800 jobs from November a year ago. Lastly, Other Mining and

Logging Undefined offset a portion of the sector's gains with a loss of -200 jobs. Total Mining and Logging employmnent (NSA) remains -8,600 jobs, or -11.0 percent below its February 2020 pre-pandemic level of 78,400. At the same time, the sector's share of Houston area Total Nonfarm Employment has risen from 2.0 percent to 2.1 percent over the past year.

**Chart 22. Mining and Logging (NSA)
Over-the-year Net Change, Nov-07 to Nov-22**
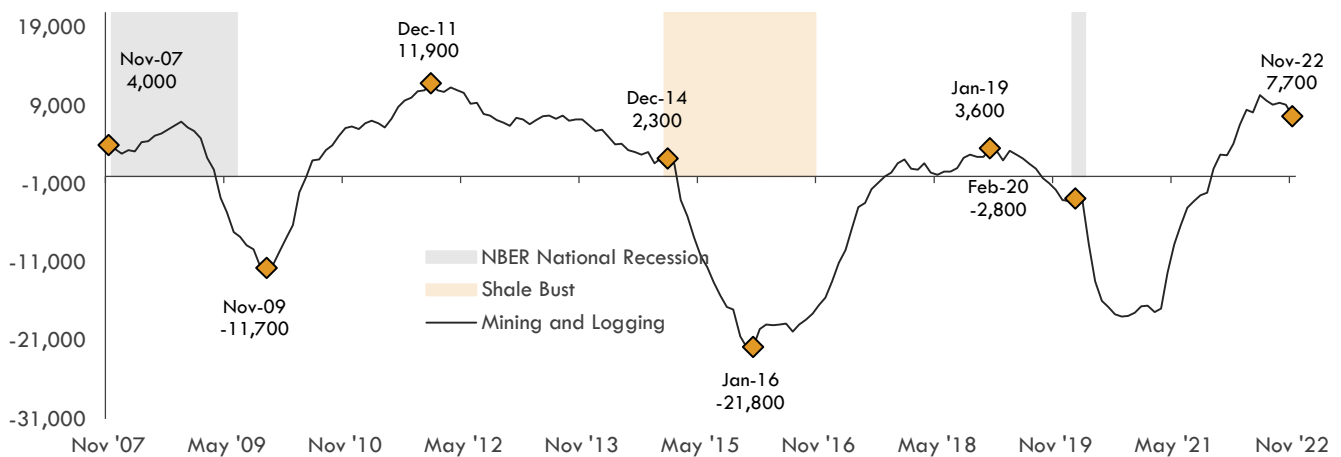
About This Sector

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 plurality of the sector's employment at 49 percent (see Chart 23). Across the Houston MSA, the concentration of jobs in the overall Mining and Logging sector is 5.1 times the national average, due to the region's role as a global hub for the oil and gas industry.

Chart 23. Employment in Component Industries of Mining and Logging Sector - November 2022
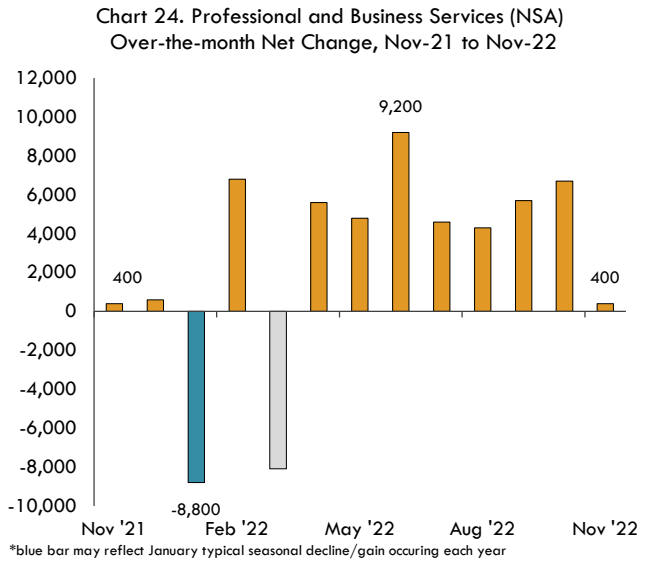

- Oil & Gas Extraction
- Support Activities for Mining
- Other Mining & Logging Undefined

Workforce Solutions
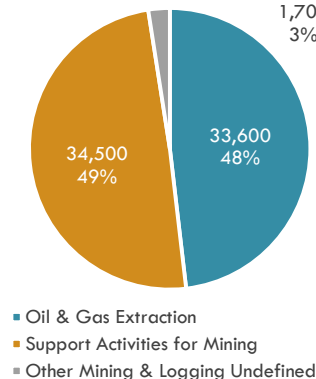
GAINING INDUSTRY HIGHLIGHTS

Professional and Business Services

Over-the-month Change

Professional and Business Services also saw an increase over the month up 400 jobs, or 0.1 percent (see Chart 24). Historically in the month of November, Professional and Business Services has added an average of 600 jobs over the month, which indicates that this month's gains are slightly below the long-term average. Professional, Scientific, and Technical Services was the largest contributor to the overall sector's increase, up 3,500 jobs over the month. The second-largest contributor was Management of Companies and Enterprises, which added 300 jobs from October to November. 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. Professional and Business Services employment was revised upward by 100 jobs for a September to October larger net gain of 6,700 compared to an original estimate of 6,600 jobs.

Chart 24. Professional and Business Services (NSA) Over-the-month Net Change, Nov-21 to Nov-22

*blue bar may reflect January typical seasonal decline/gain occuring each year

Over-the-year Change

Year over year, Professional and Business Services was up 31,800 jobs, or 6.2 percent (see Chart 25). This November tied with October 2022 for largest over-the-year gain on record. It also marks 20 consecutive months of over-the-year gains. Furthermore, 17.7 percent of total (gross) jobs added across the region over the past year can be attributed to Professional and Business Services. Professional, Scientific, and Technical Services was the largest contributor to the overall sector's increase, up 21,100 jobs over the year. The second-largest contributor was Administrative and Support and Waste Management and

Remediation Services, which added 9,100 jobs from November a year ago. Lastly, Management of Companies and Enterprises contributed, 1,600 jobs. Total Professional and Business Services employmnent (NSA) now exceeds its February 2020 pre-pandemic level of 514,700 jobs by 32,200, or 6.3 percent. At the same time, the sector's share of Houston area Total Nonfarm Employment has remained constant at 16.3 percent over the past year.
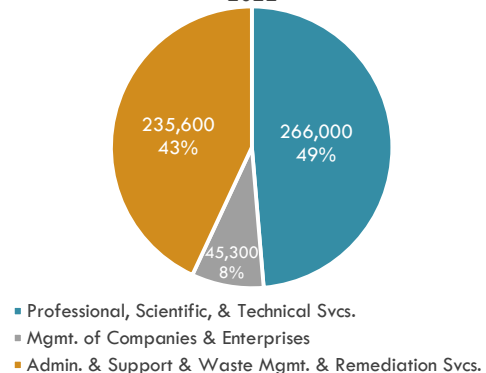
Chart 25. Professional and Business Services (NSA) Over-the-year Net Change, Nov-07 to Nov-22
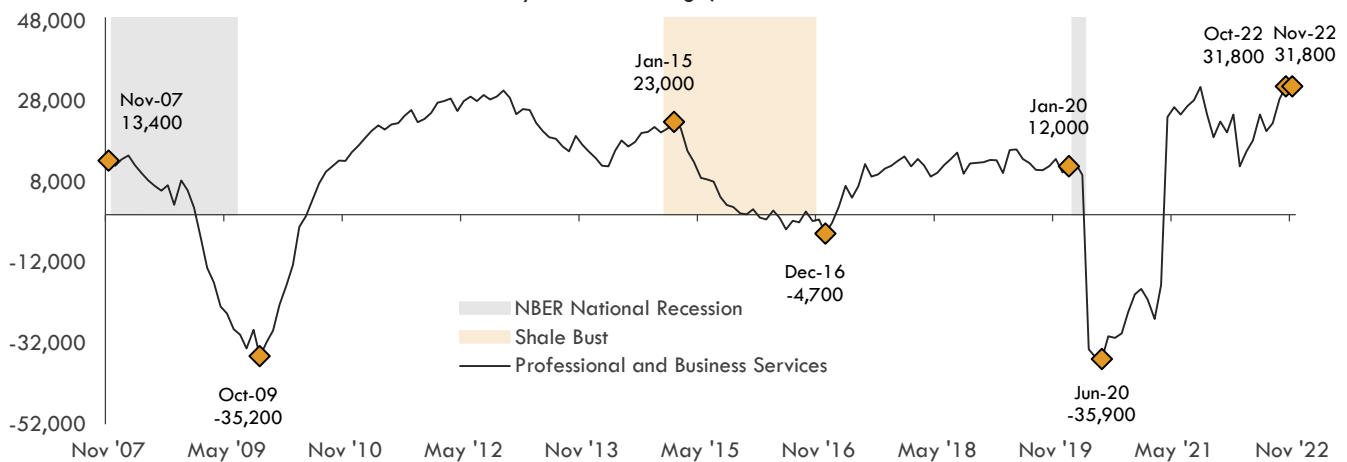
About This Sector

This sector is composed of establishments specializing in professional, scientific, and technical activities; managment 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 plurality of the sector's employment at 49 percent (see Chart 26). Across the Houston MSA, the concentration of jobs in the overall sector is 12 percent higher than the national average, due to a 16-percent higher concentration in Professional, Scientific, and Technical Services serving the oil and gas industry.

Chart 26. Employment in Component Industries of Professional and Business Services Sector - November 2022

- Professional, Scientific, & Technical Svcs. — 266,000 / 49%
- Mgmt. of Companies & Enterprises — 45,300 / 8%
- Admin. & Support & Waste Mgmt. & Remediation Svcs. — 235,600 / 43%

GAINING INDUSTRY HIGHLIGHTS

Information

Over-the-month Change

Information also saw an increase over the month up 200 jobs, or 0.6 percent (see Chart 27). Historically in the month of November, Information has added an average of 200 jobs over the month, which indicates that this month's gains are on par with the long-term average. Telecommunications was the largest contributor to the overall sector's increase, up 100 jobs over the month. The second-largest contributor was Other Information Undefined, which added 100 jobs from October to November. Information employment saw no revision from September to October leaving the previous month's original increase of 200 intact.

Chart 27. Information (NSA)
Over-the-month Net Change, Nov-21 to Nov-22

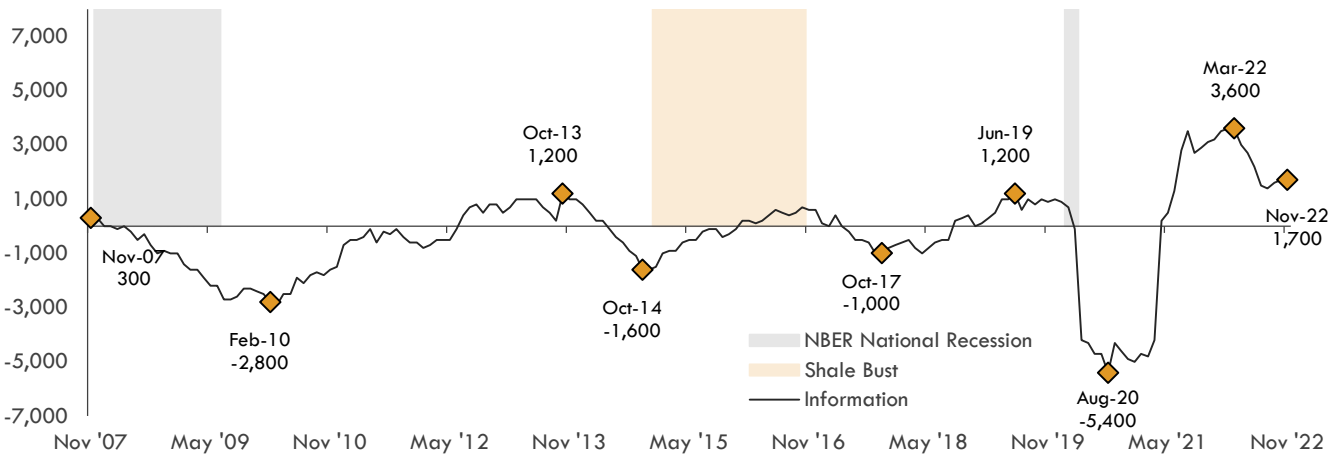*blue bar may reflect January typical seasonal decline/gain occuring each year*
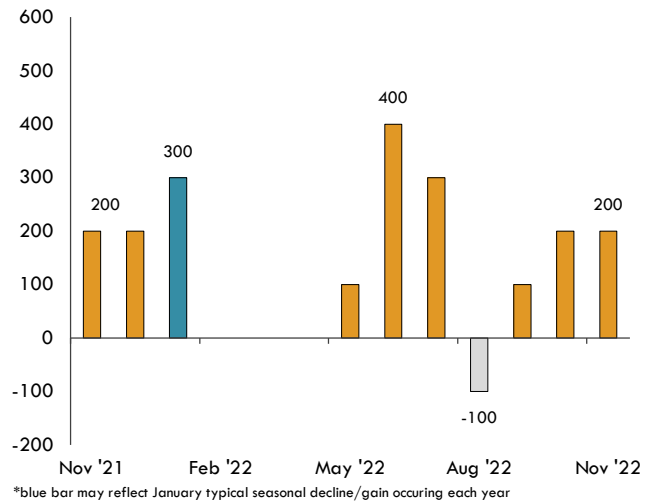
Over-the-year Change

Year over year, Information was up 1,700 jobs, or 5.5 percent (see Chart 28). This November also marks 20 consecutive months of over-the-year gains. Other Information Undefined was the largest contributor to the overall sector's increase, up 1,400 jobs over the year. The second-largest contributor was Telecommunications, which added 300 jobs from November a year ago. Total Information employmnent (NSA) currently matches its February 2020 pre-pandemic level of 32,700 jobs . At the same time, the sector's share of Houston area Total Nonfarm Employment has remained constant at 1.0 percent over

the past year.

Chart 28. Information (NSA)
Over-the-year Net Change, Nov-07 to Nov-22

Nov-07 300
Feb-10 -2,800
Oct-13 1,200
Oct-14 -1,600
Oct-17 -1,000
Jun-19 1,200
Aug-20 -5,400
Mar-22 3,600
Nov-22 1,700

NBER National Recession
Shale Bust
Information

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 62 percent (see Chart 29). Across the Houston MSA, the concentration of jobs in the overall Information sector is 51 percent less than the national average.

Chart 29. Employment in Component Industries of Information Sector - November 2022
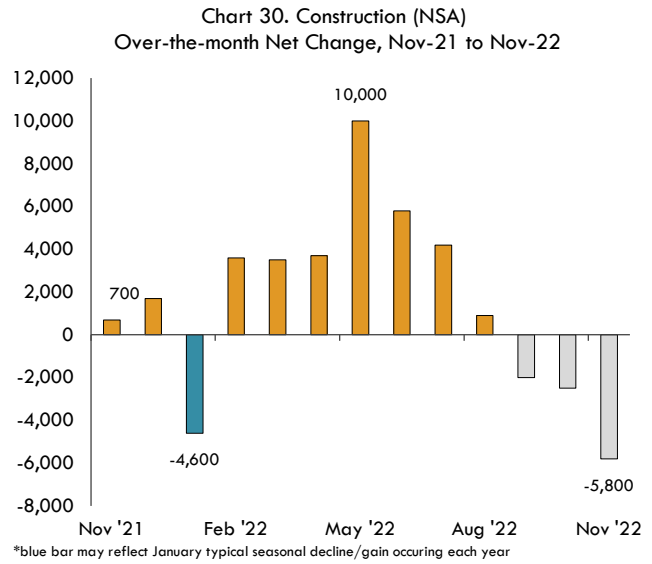
12,500 38%
20,200 62%

■ Telecommunications ■ Other Info. Undefined

Workforce Solutions
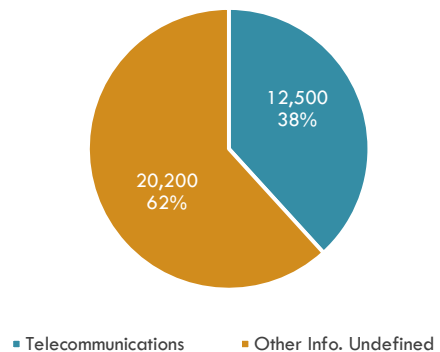
DECLINING INDUSTRY HIGHLIGHTS

Construction

Over-the-month Change

Construction was the largest declining sector over the month down -5,800 jobs, or -2.4 (see Chart 30). This was the largest-ever decline in the month of November since records began in 1990, beating the previous November record of -4,900 jobs lost in 2003. Historically in the month of November, Construction has lost an average of -1,300 jobs over the month, which indicates that this month's losses are substantially larger than the long-term average decline. Specialty Trade Contractors was the largest contributor to the overall sector's decline, down -4,000 jobs over the month. The second-largest declining contributor was Heavy and Civil Engineering Construction, which lost -1,400 jobs from October to November. Lastly, Construction of Buildings subtracted, -400 jobs. Construction employment was revised downward by -1,000 jobs for a September to October larger net loss of -2,500 compared to an original estimate of -1,500 jobs.

Chart 30. Construction (NSA)
Over-the-month Net Change, Nov-21 to Nov-22

*blue bar may reflect January typical seasonal decline/gain occuring each year

Over-the-year Change

Year over year, Construction was up 18,500 jobs, or 8.6 percent (see Chart 31). This was the second-largest over-the-year gain in the month of November since records began in 1990. It also marks 17 consecutive months of over-the-year gains. Among sectors currently showing growth, this sector is the third-fastest growing in percentage terms across the Houston area. Specialty Trade Contractors was the largest contributor to the overall sector's increase, up 10,700 jobs over the year. The second-largest contributor was Heavy and Civil Engineering Construction, which added 5,200 jobs from November a year

ago. Lastly, Construction of Buildings contributed, 2,600 jobs. Total Construction employmnent (NSA) remains -4,300 jobs, or -1.8 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 risen from 6.8 percent to 7.0 percent over the past year.

Chart 31. Construction (NSA)
Over-the-year Net Change, Nov-07 to Nov-22
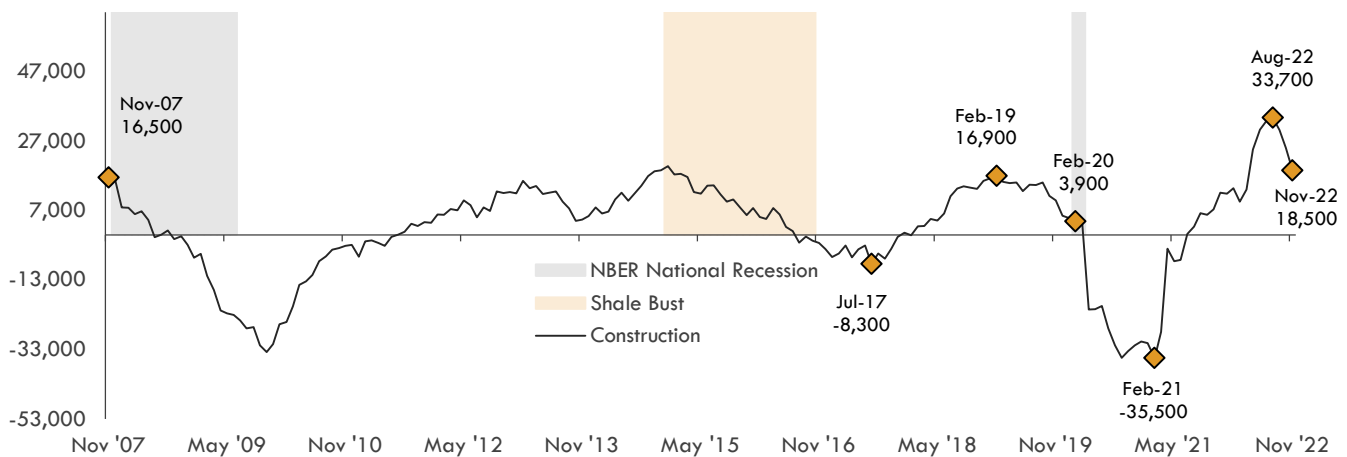
About This Sector

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 52 percent (see Chart 32). Across the Houston MSA, the concentration of jobs in the overall Construction sector is 38 percent higher than the national average, due to 2.4 times more jobs in Heavy and Civil Engineering Construction related to turnaround maintenance of petrochemical facilities.

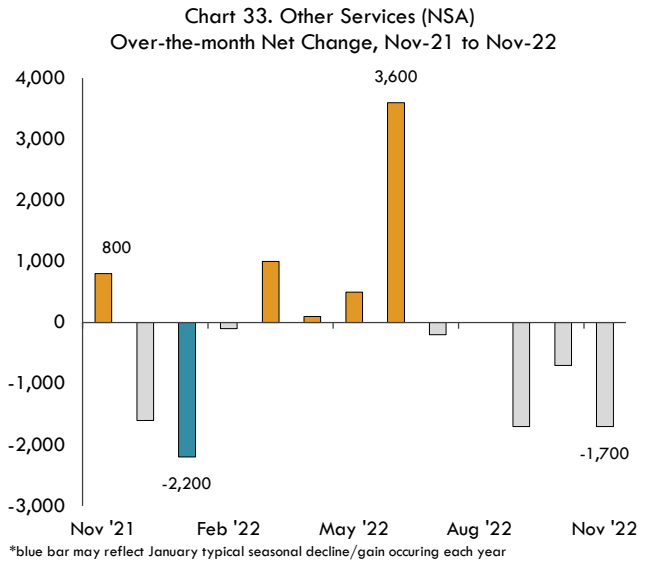Chart 32. Employment in Component Industries of Construction Sector - November 2022

- Construction of Buildings
- Heavy & Civil Engineering Construction
- Specialty Trade Contractors
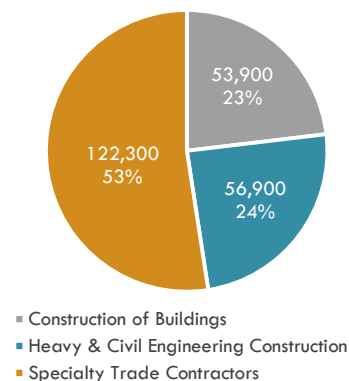
DECLINING INDUSTRY HIGHLIGHTS

Other Services

Over-the-month Change

Other Services was the second-largest declining sector over the month down -1,700 jobs, or -1.5 (see Chart 33). This was the largest-ever decline in the month of November since records began in 1990, beating the previous November record of -1,500 jobs lost in 1992. Historically in the month of November, Other Services has lost an average of -700 jobs over the month, which indicates that this month's losses are moderately larger than the long-term average decline. NOTE: No subsector is published at the MSA level by the CES survey. See below for additional information. Other Services employment saw no revision from September to October leaving the previous month's original decrease of -700 intact.

Chart 33. Other Services (NSA)
Over-the-month Net Change, Nov-21 to Nov-22

*blue bar may reflect January typical seasonal decline/gain occuring each year

Over-the-year Change

Year over year, Other Services was down -3,000 jobs, or -2.6 percent (see Chart 34). This was the third-largest over-the-year decline in November since records began in 1990 and the largest over-the-year decline since March 2021's loss of -9,700 jobs. Furthermore, 100.0 percent of total (gross) jobs lost across the region over the past year can be attributed to Other Services. NOTE: No subsector is published at the MSA level by the CES survey. See below for additional information. Total Other Services employmnent (NSA) remains -8,300 jobs, or -7.0 percent below its February 2020 pre-pandemic level of

119,100. At the same time, the sector's share of Houston area Total Nonfarm Employment has fallen from 3.6 percent to 3.3 percent over the past year.

Chart 34. Other Services (NSA)
Over-the-year Net Change, Nov-07 to Nov-22
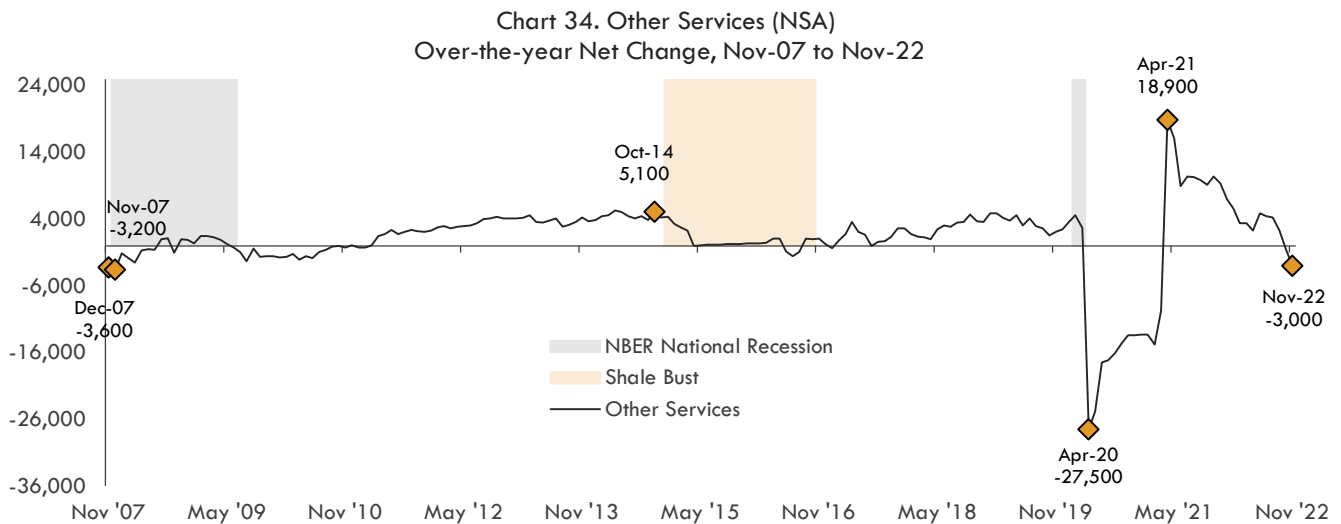
About This Sector

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 - November 2022

- Repair & Maintenance
- Personal & Laundry Svcs.
- Religious, Grantmaking, & Civic Orgs.
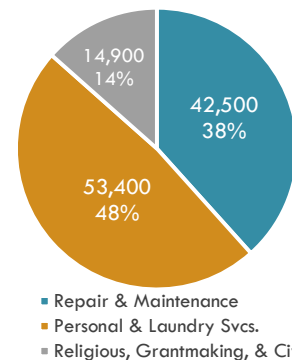
*estimated proportions based QCEW covered and NES self-employment

Workforce Solutions

DECLINING INDUSTRY HIGHLIGHTS

Financial Activities

Over-the-month Change

Financial Activities was the third-largest declining sector over the month down -1,700 jobs, or -1.0 (see Chart 36). This was the largest-ever decline in the month of November since records began in 1990, beating the previous November record of -1,300 jobs lost in 2021. Historically in the month of November, Financial Activities has lost an average of -100 jobs over the month, which indicates that this month's losses are substantially larger than the long-term average decline. Real Estate and Rental and Leasing was the largest contributor to the overall sector's decline, down -1,400 jobs over the month. The second-largest declining contributor was Finance and Insurance, which lost -300 jobs from October to November. Financial Activities employment was revised upward by 700 jobs for a September to October larger net gain of 1,900 compared to an original estimate of 1,200 jobs.

Chart 36. Financial Activities (NSA)
Over-the-month Net Change, Nov-21 to Nov-22

*blue bar may reflect January typical seasonal decline/gain occuring each year

Over-the-year Change

Year over year, Financial Activities was up 7,000 jobs, or 4.1 percent (see Chart 37). This was the second-largest over-the-year gain in the month of November since records began in 1990. It also marks nine consecutive months of over-the-year gains. Real Estate and Rental and Leasing was the largest contributor to the overall sector's increase, up 4,200 jobs over the year. The second-largest contributor was Finance and Insurance, which added 2,800 jobs from November a year ago. Total Financial Activities employmnent (NSA) now exceeds its February 2020 pre-pandemic level of 169,200 jobs by 6,800,

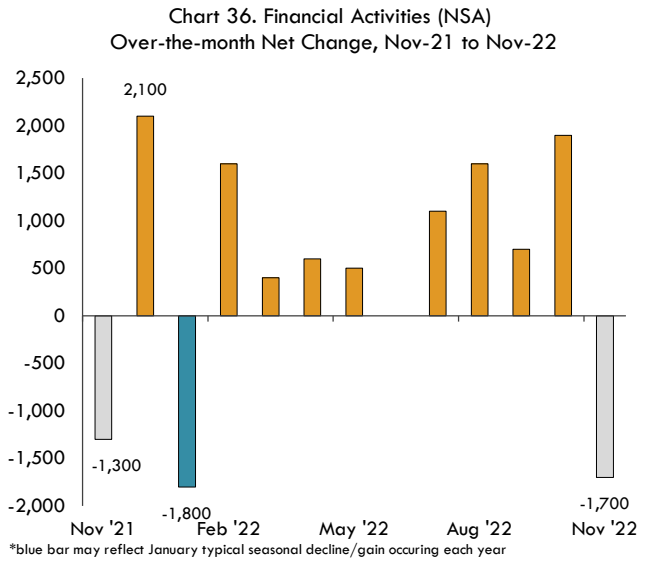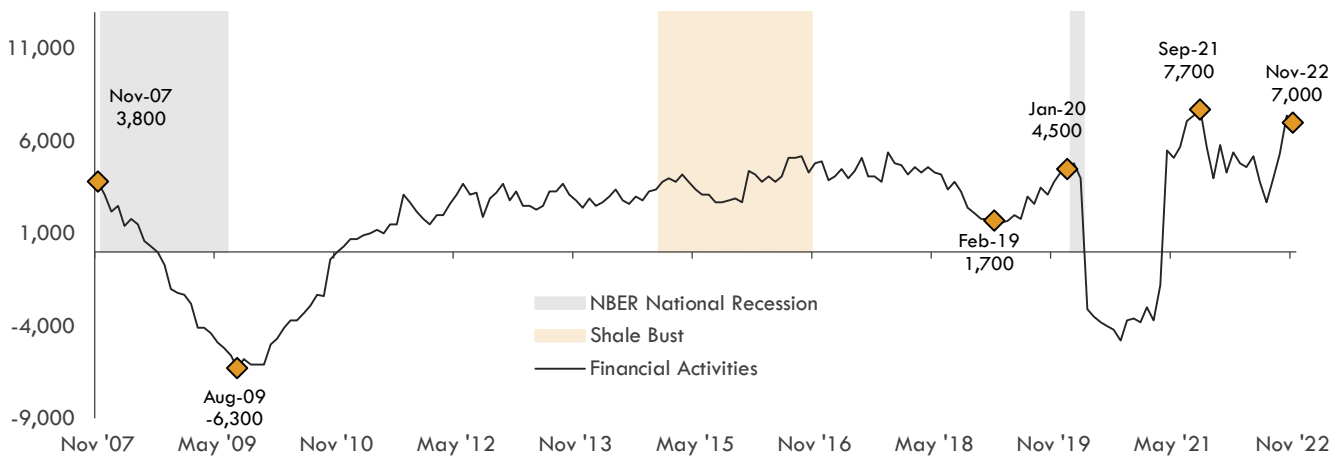or 4.0 percent. At the same time, the sector's share of Houston area Total Nonfarm Employment has remained constant at 5.3 percent over the past year.

Chart 37. Financial Activities (NSA)
Over-the-year Net Change, Nov-07 to Nov-22

- Nov-07: 3,800
- Aug-09: -6,300
- Feb-19: 1,700
- Jan-20: 4,500
- Sep-21: 7,700
- Nov-22: 7,000

Legend:
- NBER National Recession
- Shale Bust
- Financial Activities

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 63 percent (see Chart 38). Across the Houston MSA, the concentration of jobs in the overall Financial Activities sector is 9 percent less than the national average, due to a 22-percent lower concentration in Finance and Insurance offsetting a 26-percent higher concentration in Real Estate and Rental and Leasing.

Chart 38. Employment in Component Industries of Financial Activities Sector - November 2022

- 65,000 / 37%
- 111,000 / 63%

Legend:
- Real Estate & Rental & Leasing
- Finance & Insurance

Workforce Solutions
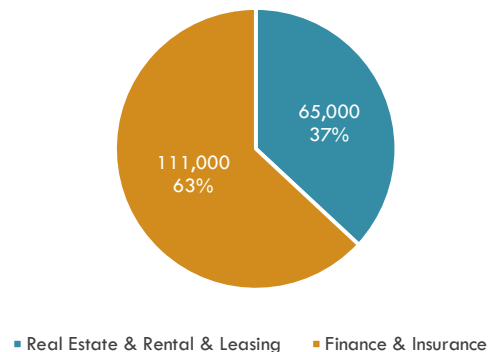
Local Area Unemployment Statistics

Not-Seasonally Adjusted

Houston Metro, Texas, and U.S. Unemployment

The Houston MSA (not-seasonally-adjusted) unemployment rate stood at 4.0 percent in November, down from October's 4.1 percent and down from 5.1 percent a year ago. This was above the statewide rate of 3.7 percent and above the national rate of 3.4 percent. An over-the-month increase in November is typical having occurred roughly 70 percent of the time over the past three decades making this month's decrease stand in contrast to historical seasonal trends. 142,981 individuals were unemployed in Houston in November, down from October's 144,541 and down from 176,962 in November 2021 (see Charts 39 and 40).
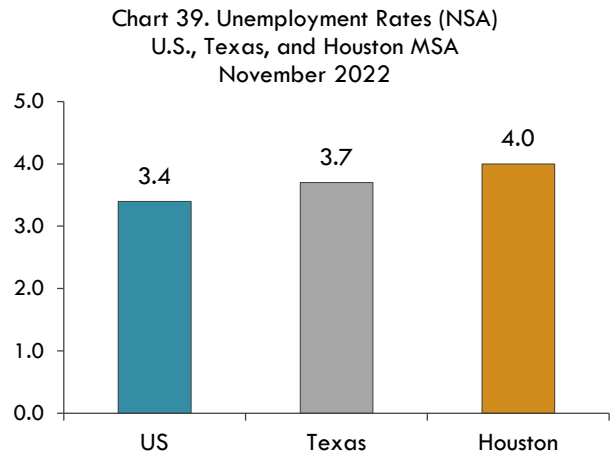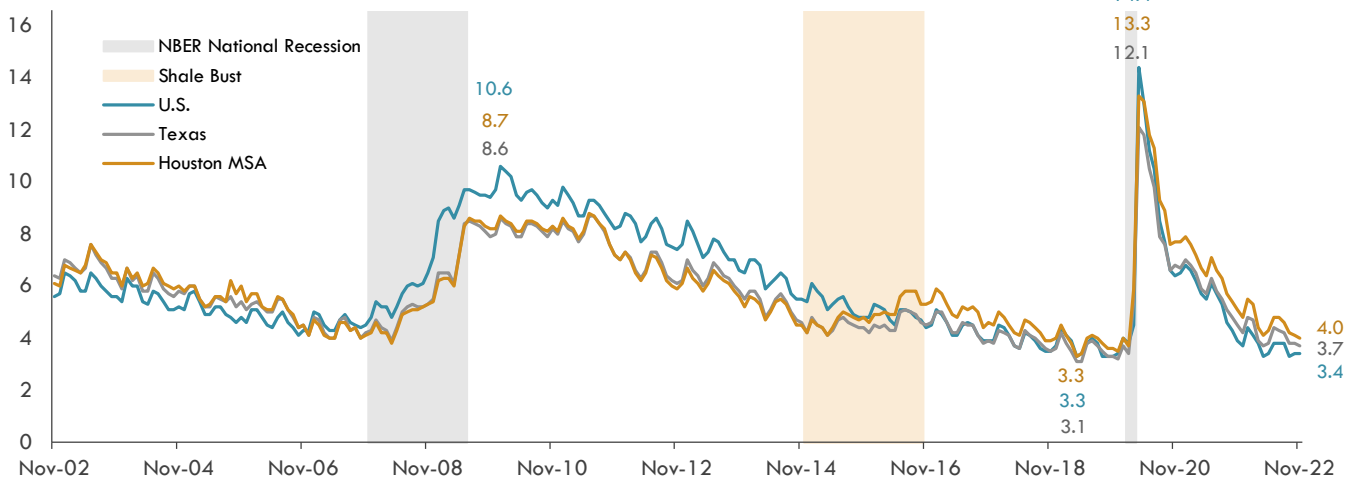
Chart 39. Unemployment Rates (NSA)
U.S., Texas, and Houston MSA
November 2022

Chart 40. Unemployment Rates U.S., Texas, and Houston MSA (NSA)
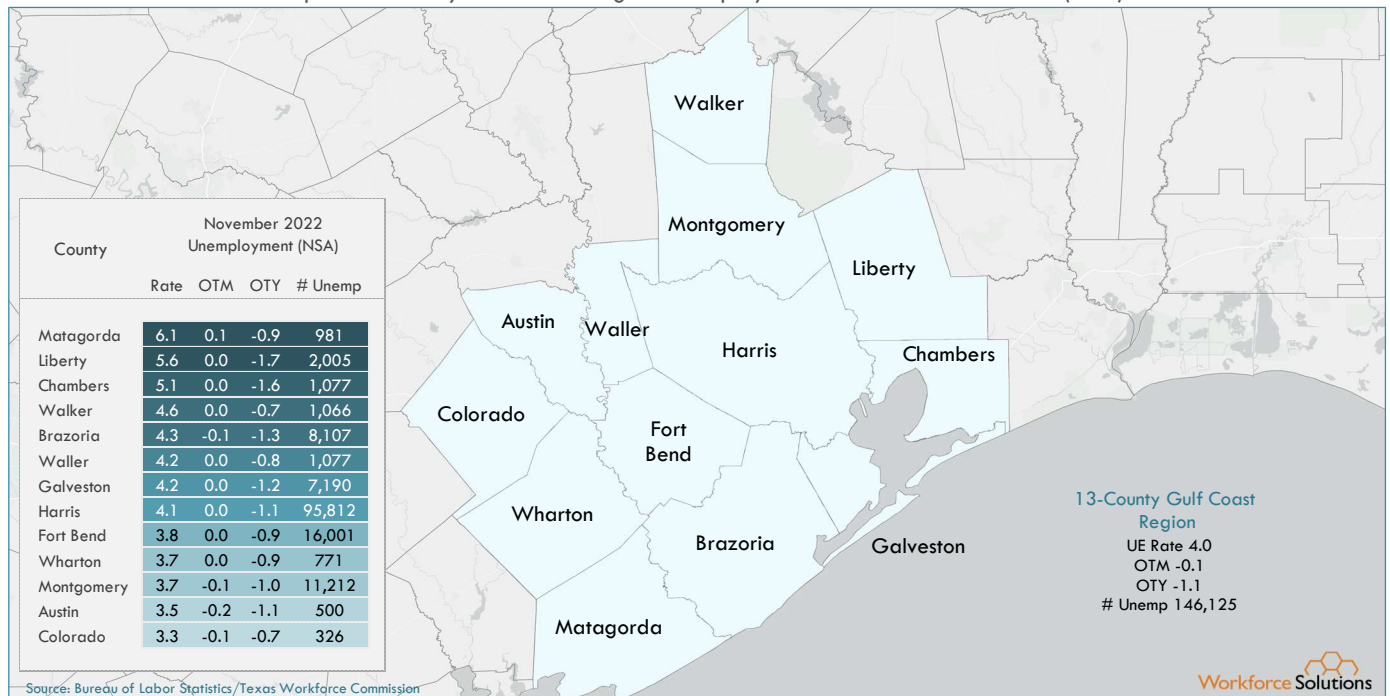**November 2002 to November 2022**

County-level Unemployment

Among the 13 counties that comprise the Gulf Coast Workforce Development Area, unemployment rates in November ranged from a high of 6.1 percent in Matagorda County to a low of 3.3 percent in Colorado. Over the month, eight counties saw their unemployment unchanged in contrast to region-wide decrease of -0.1 percentage points while four declined and one increased. Austin saw the largest percentage-point decrease in unemployment down -0.2 pp. representing -21 fewer unemployed workers compared to the previous month. This was followed by Montgomery (-0.1 pp, -239 workers) and Brazoria

(-0.1 pp, -16 workers). Over the year unemployment rates also fell, with Liberty posting the largest decrease, down -1.7 percentage points representing -557 fewer unemployed workers compared to a year ago followed by Chambers (-1.6 pp, -324 workers) and Brazoria (-1.3 pp, -2,072 workers). Since peaking at 446,307 in May 2020 due to the COVID-19 global pandemic, the number of unemployed workers in the Gulf Coast Region has fallen by -300,182 as of this November (see Map 1 legend).

Map 1. 13-County Gulf Coast Region Unemployment Rates November 2022 (NSA)

County	November 2022 Unemployment (NSA)			
	Rate	OTM	OTY	# Unemp
Matagorda	6.1	0.1	-0.9	981
Liberty	5.6	0.0	-1.7	2,005
Chambers	5.1	0.0	-1.6	1,077
Walker	4.6	0.0	-0.7	1,066
Brazoria	4.3	-0.1	-1.3	8,107
Waller	4.2	0.0	-0.8	1,077
Galveston	4.2	0.0	-1.2	7,190
Harris	4.1	0.0	-1.1	95,812
Fort Bend	3.8	0.0	-0.9	16,001
Wharton	3.7	0.0	-0.9	771
Montgomery	3.7	-0.1	-1.0	11,212
Austin	3.5	-0.2	-1.1	500
Colorado	3.3	-0.1	-0.7	326

13-County Gulf Coast Region
UE Rate 4.0
OTM -0.1
OTY -1.1
Unemp 146,125

Source: Bureau of Labor Statistics/Texas Workforce Commission
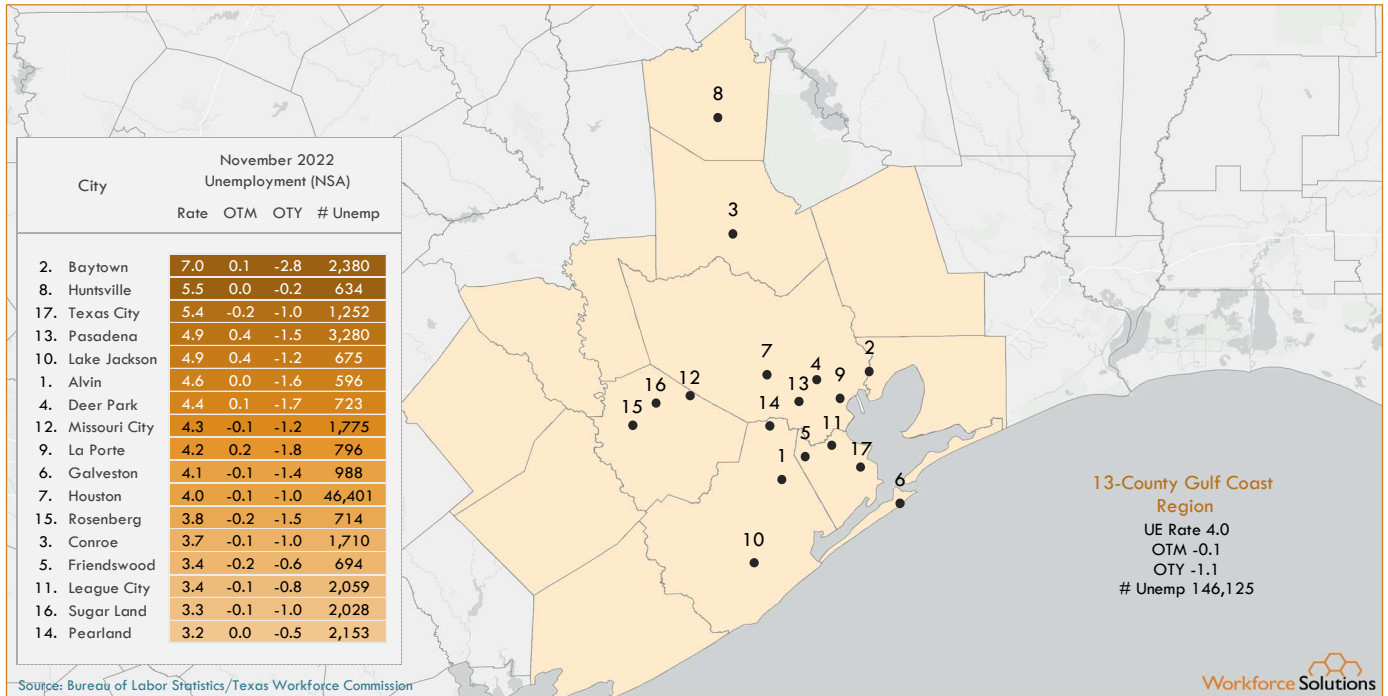
Local Area Unemployment Statistics (continued)

Not-Seasonally Adjusted

Unemployment Rates for Select Municipalities

Among the 17 cities in the Gulf Coast Workforce Development Area for which Local Area Unemployment Statistics are available, unemployment rates in November ranged from a high of 7.0 percent in Baytown to a low of 3.2 percent in Pearland (see Map 2 legend). Over the month, nine cities saw their unemployment rates decline in keeping with the region-wide decrease of -0.1 percentage points while five increased and three saw no changes. Rosenberg saw the largest

percentage-point decrease in unemployment down -0.2 pp. representing -32 fewer unemployed workers compared to the previous month. This was followed by Texas City (-0.2 pp, -40 workers) and Friendswood (-0.2 pp, -43 workers). Over the year unemployment rates also fell, with Baytown posting the largest decrease, down -2.8 percentage points representing -940 fewer unemployed workers compared to a year ago followed by La Porte (-1.8 pp, -313 workers) and Deer Park (-1.7 pp, -275 workers). The 17 cities below accounted for 47 percent of the 146,125 unemployed workers across the Gulf Coast Region as of this November (see Map 2 legend).

Map 2. 13-County Gulf Coast Region City Unemployment Rates November 2022 (NSA)

City	November 2022 Unemployment (NSA)			
	Rate	OTM	OTY	# Unemp
2. Baytown	7.0	0.1	-2.8	2,380
8. Huntsville	5.5	0.0	-0.2	634
17. Texas City	5.4	-0.2	-1.0	1,252
13. Pasadena	4.9	0.4	-1.5	3,280
10. Lake Jackson	4.9	0.4	-1.2	675
1. Alvin	4.6	0.0	-1.6	596
4. Deer Park	4.4	0.1	-1.7	723
12. Missouri City	4.3	-0.1	-1.2	1,775
9. La Porte	4.2	0.2	-1.8	796
6. Galveston	4.1	-0.1	-1.4	988
7. Houston	4.0	-0.1	-1.0	46,401
15. Rosenberg	3.8	-0.2	-1.5	714
3. Conroe	3.7	-0.1	-1.0	1,710
5. Friendswood	3.4	-0.2	-0.6	694
11. League City	3.4	-0.1	-0.8	2,059
16. Sugar Land	3.3	-0.1	-1.0	2,028
14. Pearland	3.2	0.0	-0.5	2,153

13-County Gulf Coast Region
UE Rate 4.0
OTM -0.1
OTY -1.1
Unemp 146,125

Source: Bureau of Labor Statistics/Texas Workforce Commission

Workforce Solutions

Seasonally Adjusted

Houston Metro, Texas, and U.S. Unemployment

The Houston MSA (seasonally-adjusted) unemployment rate stood at 4.4 percent in October, unchanged from September's 4.4 percent and down from 5.6 percent a year ago. This was above the statewide rate of 4.0 percentand above the national rate of 3.7 percent. 154,729 individuals were unemployed in Houston in October, down slightly from September's 155,382 and down from 192,326 in October 2021 (see Charts 41 and 42). NOTE: Seasonally-adjusted data for the MSA are available with a one-month delay but are not available for the 13-County Region or 17 cities.

Chart 41. Unemployment Rates (SA)
U.S., Texas, and Houston MSA
October 2022

US	Texas	Houston MSA
3.7	4.0	4.4
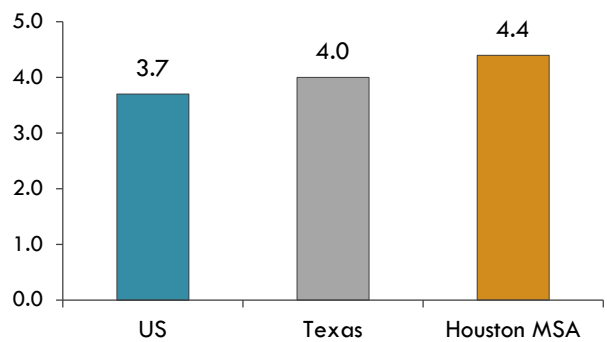
Chart 42. Unemployment Rates U.S., Texas, and Houston MSA (SA)
October 2002 to October 2022

- NBER National Recession
- Shale Bust
- U.S.
- Texas
- Houston MSA

10.0 / 8.5 / 8.3

14.7 / 14.4 / 12.6

3.7 / 3.5 / 3.4

4.4 / 4.0 / 3.7

Workforce Solutions

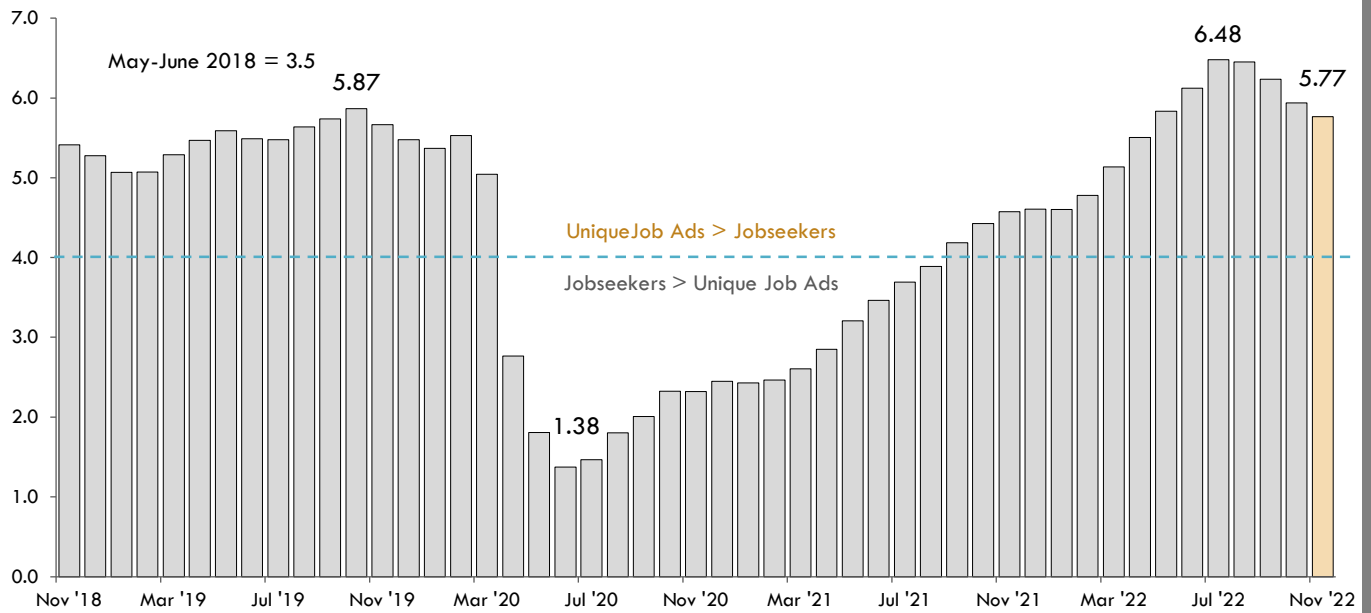## Gulf Coast Workforce Solutions Index (WSI)
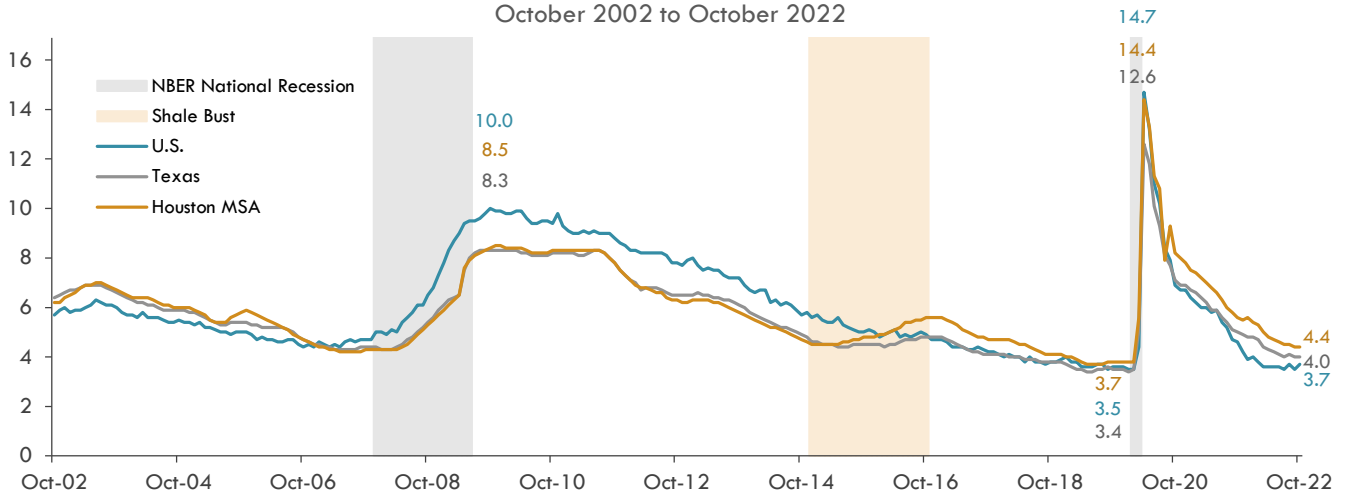
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The Gulf Coast Workforce Solutions Index (WSI)

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 November 2022:

5.77

Gulf Coast Workforce Solutions Index - Houston MSA 2017 - 2022 (SA)

May-June 2018 = 3.5
5.87
6.48
5.77
UniqueJob Ads > Jobseekers
Jobseekers > Unique Job Ads
1.38

Source(s): Emsi-Burning Glass and BLS/TWC - LAUS

Workforce Solutions

Workforce Solutions Index November 2022

The Houston MSA WSI for November stood at 5.77, down from October's slightly upward revised reading of 5.94. November's reading marks four over-the-month consecutive declines in the index confirming a peak for the cycle in July of 6.48. This November's decline was the result of a nearly 14,000-decrease in job ads over from October compared to a much smaller decrease in unemployed workers by only 650 from September to October (SA). Nonetheless, the indicator suggests that a requirement of five work search activities may be appropriate for individuals receiving unemployment insurance given the relative availability of jobs at present.

Workforce Solutions

Table 1. Houston MSA Sectors and Major Industry Subcomponents

NAICS Industry	Nov-22	Oct-22	Nov-21	Monthly	Monthly	Yearly	Yearly %
Total Nonfarm	**3,337,000**	**3,322,500**	**3,160,700**	**14,500**	**0.4%**	**176,300**	**5.6%**
Total Private	2,894,200	2,883,300	2,723,700	10,900	0.4%	170,500	6.3%
Goods Producing	530,900	535,200	492,500	-4,300	-0.8%	38,400	7.8%
.Mining and Logging	**69,800**	**69,100**	**62,100**	**700**	**1.0%**	**7,700**	**12.4%**
...Oil and Gas Extraction	33,600	33,300	29,800	300	0.9%	3,800	12.8%
...Support Activities for Mining	34,500	34,000	30,400	500	1.5%	4,100	13.5%
.Construction	**233,100**	**238,900**	**214,600**	**-5,800**	**-2.4%**	**18,500**	**8.6%**
..Construction of Buildings	53,900	54,300	51,300	-400	-0.7%	2,600	5.1%
..Heavy and Civil Engineering Construction	56,900	58,300	51,700	-1,400	-2.4%	5,200	10.1%
..Specialty Trade Contractors	122,300	126,300	111,600	-4,000	-3.2%	10,700	9.6%
.Manufacturing	**228,000**	**227,200**	**215,800**	**800**	**0.4%**	**12,200**	**5.7%**
..Durable Goods	141,500	141,400	133,600	100	0.1%	7,900	5.9%
...Fabricated Metal Product Manufacturing	49,300	49,300	45,500	0	0.0%	3,800	8.4%
...Machinery Manufacturing	40,200	39,900	39,200	300	0.8%	1,000	2.6%
....Agriculture, Construction, and Mining Machinery Mfg.	20,500	20,400	19,800	100	0.5%	700	3.5%
...Computer and Electronic Product Manufacturing	13,200	13,200	12,800	0	0.0%	400	3.1%
..Non-Durable Goods	86,500	85,800	82,200	700	0.8%	4,300	5.2%
...Petroleum and Coal Products Manufacturing	8,200	8,200	8,100	0	0.0%	100	1.2%
...Chemical Manufacturing	40,300	40,200	39,300	100	0.2%	1,000	2.5%
Service Providing	2,806,100	2,787,300	2,668,200	18,800	0.7%	137,900	5.2%
.Private Service Providing	2,363,300	2,348,100	2,231,200	15,200	0.6%	132,100	5.9%
..Trade, Transportation, and Utilities	**687,000**	**676,100**	**660,600**	**10,900**	**1.6%**	**26,400**	**4.0%**
...Wholesale Trade	179,000	179,600	164,700	-600	-0.3%	14,300	8.7%
....Merchant Wholesalers, Durable Goods	108,000	108,700	100,000	-700	-0.6%	8,000	8.0%
.....Prof. and Commercial Equip. Supplies Wholesalers	18,100	18,100	17,200	0	0.0%	900	5.2%
....Merchant Wholesalers, Nondurable Goods	56,400	56,500	53,500	-100	-0.2%	2,900	5.4%
...Retail Trade	329,000	322,600	319,100	6,400	2.0%	9,900	3.1%
....Motor Vehicle and Parts Dealers	43,700	43,500	42,200	200	0.5%	1,500	3.6%
....Bldg. Material and Garden Equip. and Supplies Dealers	23,000	23,100	22,400	-100	-0.4%	600	2.7%
....Food and Beverage Stores	73,900	72,600	71,700	1,300	1.8%	2,200	3.1%
....Health and Personal Care Stores	21,500	21,200	20,900	300	1.4%	600	2.9%
....Clothing and Clothing Accessories Stores	25,800	24,300	25,000	1,500	6.2%	800	3.2%
....General Merchandise Stores	66,100	63,600	67,100	2,500	3.9%	-1,000	-1.5%
.....Department Stores	21,600	20,500	22,300	1,100	5.4%	-700	-3.1%
.....Other General Merchandise Stores	44,500	43,100	44,800	1,400	3.2%	-300	-0.7%
...Transportation, Warehousing, and Utilities	179,000	173,900	176,800	5,100	2.9%	2,200	1.2%
....Utilities	17,900	17,800	17,500	100	0.6%	400	2.3%
.....Air Transportation	19,400	19,300	18,100	100	0.5%	1,300	7.2%
.....Truck Transportation	29,100	29,500	27,800	-400	-1.4%	1,300	4.7%
.....Pipeline Transportation	12,900	12,800	12,400	100	0.8%	500	4.0%
..Information	**32,700**	**32,500**	**31,000**	**200**	**0.6%**	**1,700**	**5.5%**
...Telecommunications	12,500	12,400	12,200	100	0.8%	300	2.5%
..Financial Activities	**176,000**	**177,700**	**169,000**	**-1,700**	**-1.0%**	**7,000**	**4.1%**
...Finance and Insurance	111,000	111,300	108,200	-300	-0.3%	2,800	2.6%
....Credit Intermediation and Related Activities	46,700	47,100	45,900	-400	-0.8%	800	1.7%
.....Depository Credit Intermediation	30,000	30,200	29,400	-200	-0.7%	600	2.0%
....Securities, Commodity Contracts, and Fin. Investments	22,000	22,000	21,500	0	0.0%	500	2.3%
....Insurance Carriers and Related Activities	42,300	42,200	40,800	100	0.2%	1,500	3.7%
...Real Estate and Rental and Leasing	65,000	66,400	60,800	-1,400	-2.1%	4,200	6.9%
..Professional and Business Services	**546,900**	**546,500**	**515,100**	**400**	**0.1%**	**31,800**	**6.2%**
...Professional, Scientific, and Technical Services	266,000	262,500	244,900	3,500	1.3%	21,100	8.6%
....Legal Services	31,500	31,300	29,900	200	0.6%	1,600	5.4%
....Accounting, Tax Preparation, Bookkeeping, and Payroll	27,300	27,200	26,200	100	0.4%	1,100	4.2%
....Architectural, Engineering, and Related Services	77,200	75,800	67,000	1,400	1.8%	10,200	15.2%
....Computer Systems Design and Related Services	40,400	40,100	38,400	300	0.7%	2,000	5.2%
...Management of Companies and Enterprises	45,300	45,000	43,700	300	0.7%	1,600	3.7%
...Admin. and Support and Waste Mgmt. and Remediation	235,600	239,000	226,500	-3,400	-1.4%	9,100	4.0%
....Administrative and Support Services	224,600	228,100	214,900	-3,500	-1.5%	9,700	4.5%
.....Employment Services	87,400	88,700	87,100	-1,300	-1.5%	300	0.3%
.....Services to Buildings and Dwellings	52,400	53,200	49,900	-800	-1.5%	2,500	5.0%
..Educational and Health Services	**445,000**	**441,600**	**426,600**	**3,400**	**0.8%**	**18,400**	**4.3%**
...Educational Services	76,100	75,300	69,700	800	1.1%	6,400	9.2%
...Health Care and Social Assistance	368,900	366,300	356,900	2,600	0.7%	12,000	3.4%
....Ambulatory Health Care Services	184,100	181,000	178,800	3,100	1.7%	5,300	3.0%
....Hospitals	95,400	94,800	89,400	600	0.6%	6,000	6.7%
..Leisure and Hospitality	**364,900**	**361,200**	**315,100**	**3,700**	**1.0%**	**49,800**	**15.8%**
...Arts, Entertainment, and Recreation	38,200	37,600	30,500	600	1.6%	7,700	25.2%
...Accommodation and Food Services	326,700	323,600	284,600	3,100	1.0%	42,100	14.8%
....Accommodation	26,900	26,600	22,500	300	1.1%	4,400	19.6%
....Food Services and Drinking Places	299,800	297,000	262,100	2,800	0.9%	37,700	14.4%
..Other Services	**110,800**	**112,500**	**113,800**	**-1,700**	**-1.5%**	**-3,000**	**-2.6%**
Government	**442,800**	**439,200**	**437,000**	**3,600**	**0.8%**	**5,800**	**1.3%**
.Federal Government	32,400	32,300	32,300	100	0.3%	100	0.3%
.State Government	96,600	96,000	94,700	600	0.6%	1,900	2.0%
..State Government Educational Services	56,100	55,600	55,100	500	0.9%	1,000	1.8%
.Local Government	313,800	310,900	310,000	2,900	0.9%	3,800	1.2%
..Local Government Educational Services	219,500	217,000	216,100	2,500	1.2%	3,400	1.6%

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