



Houston Area Employment Situation: Spring 2021 Update

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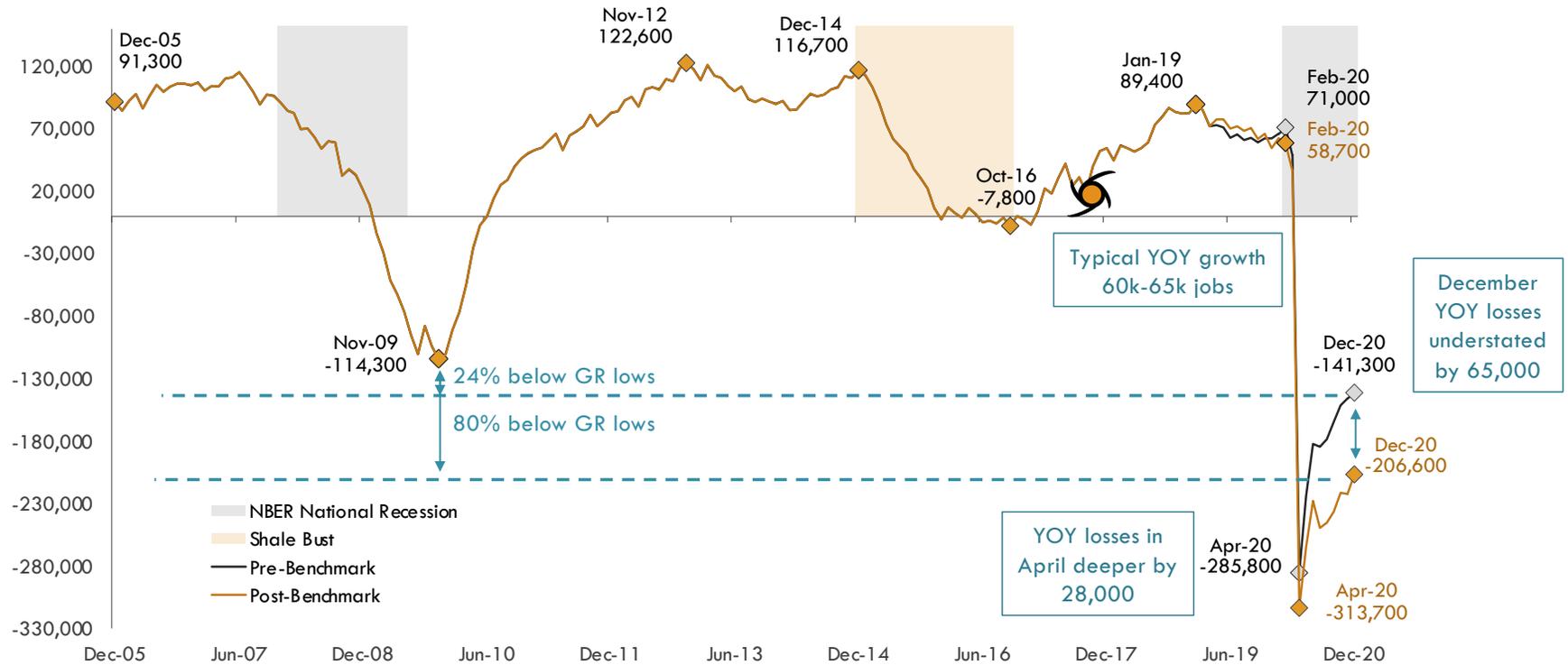
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Houston MSA

Job Growth/Loss in 2020

Houston MSA: Total Nonfarm Employment OTY (NSA) December 2005 to December 2020 (pre- and post-benchmark revisions)



Source: TWC/BLS



Sources of Underestimated Job Losses in 2020

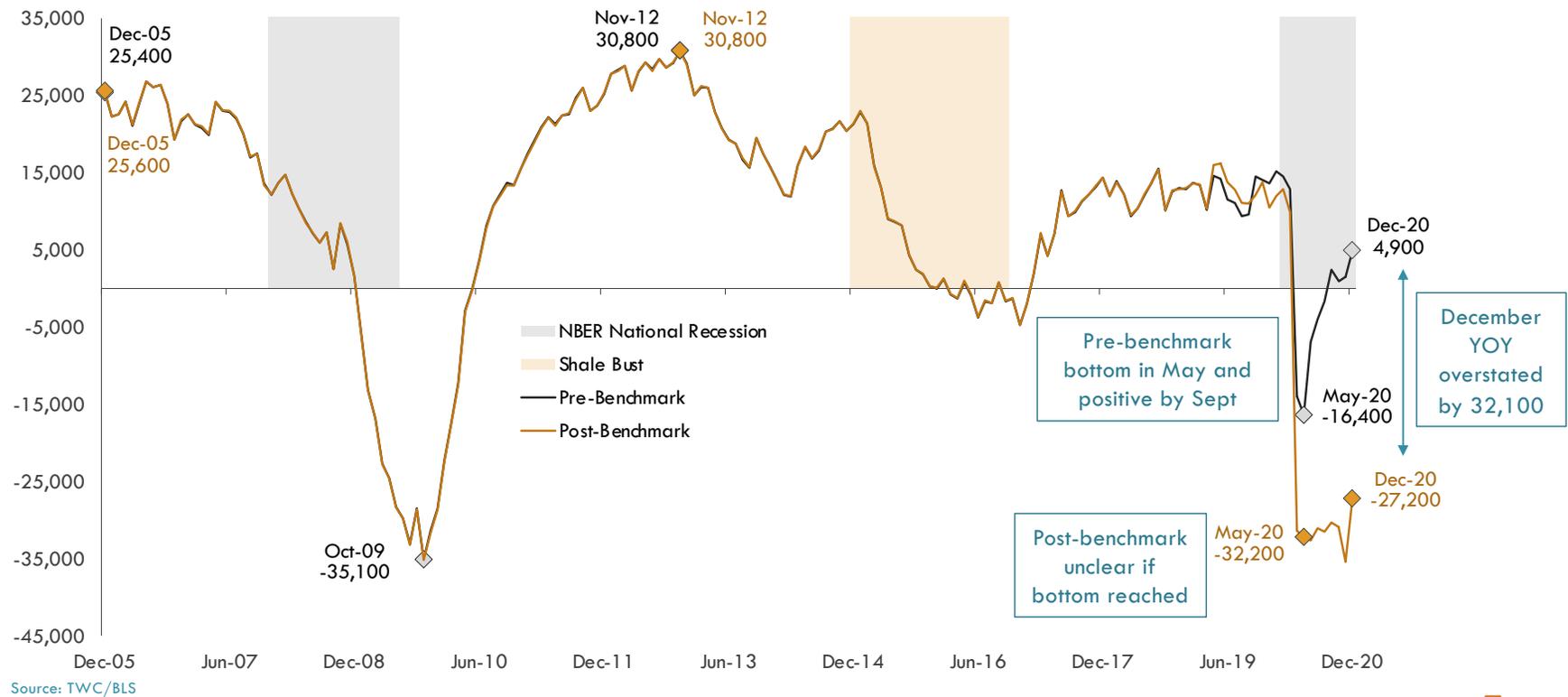
Houston MSA Sources of Underestimated Job Losses Dec-19 to Dec-20 (2020 Benchmark Revisions)

Sectors with fewer lost jobs		Sectors with more lost jobs		Sectors with all gains revised to losses	
Sector	Jobs	Sector	Jobs	Sector	Jobs
Mining and Logging	2,900	Leisure & Hospitality	-12,300	Prof. & Business Services	-32,100
Other Services	2,600	Construction	-9,500		
		Education & Health Services	-6,100		
		Manufacturing	-5,400		
		Trade, Transport., & Utilities	-1,900		
		Government	-1,500		
		Information	-1,200		
		Financial Activities	-800		
TOTAL	5,500	TOTAL	-38,700	TOTAL	-32,100

Accounts for
nearly half of
underestimated
losses

Net under-estimation of losses: **-65,300**

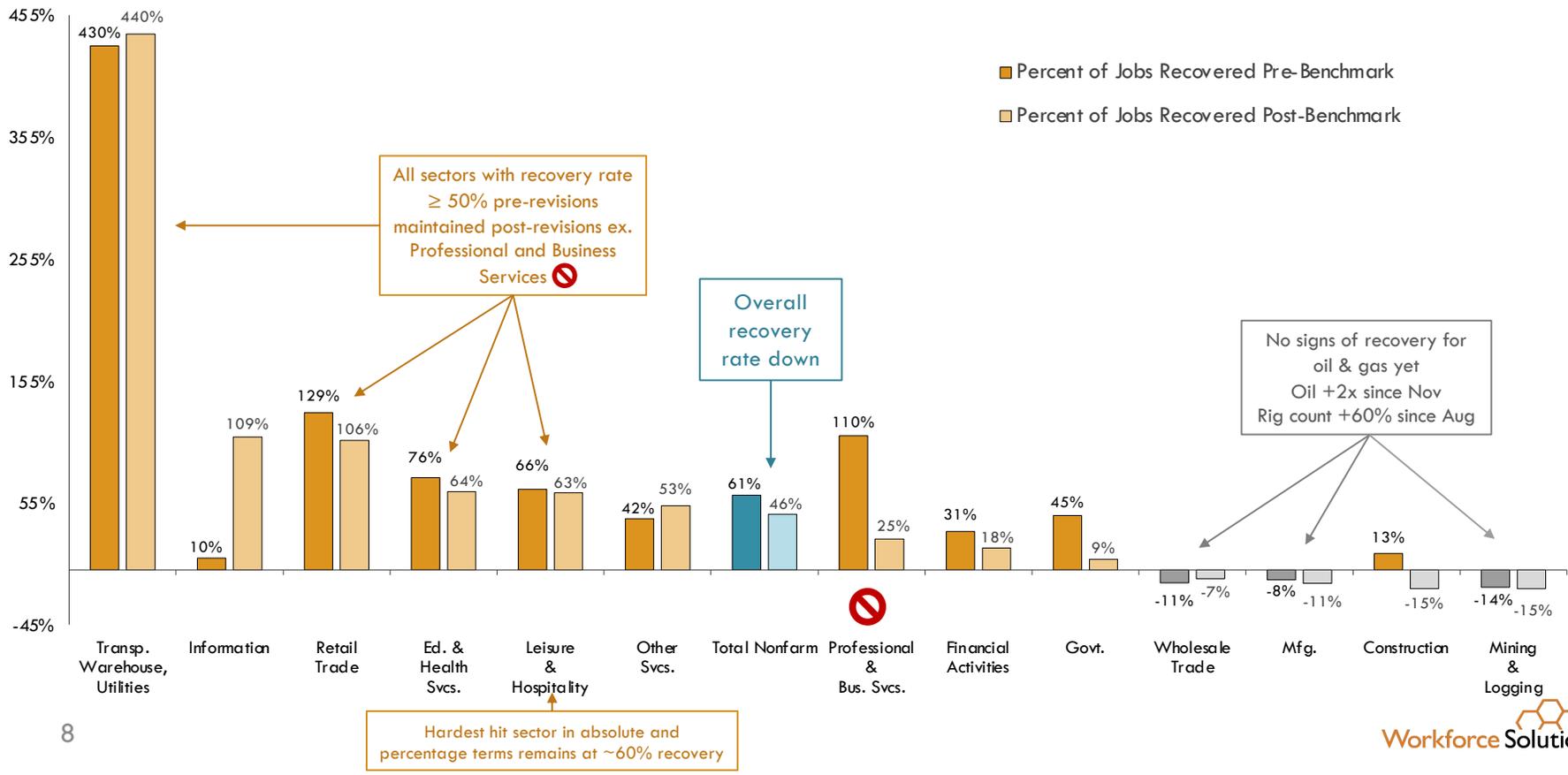
Houston MSA: Professional and Business Services OTY(NSA) December 2005 to December 2020 (pre- and post-2020 benchmark revisions)





What is the state of the recovery after benchmark revisions?

Houston MSA Percentage of Jobs Lost March-April 2020 Recovered by Sector as of December 2020 (Pre- and Post-2020 Benchmark)





What about industry recovery rates in Fort Bend County?

Fort Bend County Recovery Rates of March-April 2020 Top-20 Declining Industries through September 2020

Industry	March + April Losses	May thru Sep Gains	Recovery Rate
Total, All Industries	-26,808	15,751	59%
Restaurants and Other Eating Places	-7,463	4,862	65%
Other Amusement and Recreation Industries	-1,913	1,081	57%
Elementary and Secondary Schools	-1,862	1,792	96%
Clothing Stores	-1,678	1,193	71%
Offices of Dentists	-1,331	1,218	92%
Child Day Care Services	-1,327	369	28%
Personal Care Services	-1,154	1,025	89%
Employment Services	-753	569	76%
Department Stores	-701	378	54%
Motion Picture and Video Industries	-658	187	28%
Other Schools and Instruction	-547	272	50%
Offices of Physicians	-412	360	87%
General Medical and Surgical Hospitals	-375	291	78%
Automotive Repair and Maintenance	-370	337	91%
Traveler Accommodation	-352	74	21%
Sporting Goods, Hobby, and Musical Instrument Stores	-290	297	102%
Offices of Other Health Practitioners	-282	303	107%
Health and Personal Care Stores	-218	216	99%
Drycleaning and Laundry Services	-217	58	27%
Shoe Stores	-196	162	83%



Business Formation During the Pandemic

Fort Bend County Change in Employment vs. Change in No. of Business Establishments Various Timeframes 2019 – 2020

Industry	Q3-2019 to Q3-2020		Q2-2019 to Q2-2020		Q1-2020 to Q2-2020	
	Net Change Employment	Net Change Business Establishments	Net Change Employment	Net Change Business Establishments	Net Change Employment	Net Change Business Establishments
Total, All Industries	-9,303	852	-15,863	813	-18,455	191
Restaurants and Other Eating Places	-2,019	50	-4,049	61	-4,686	1
Support Activities for Mining	-1,106	-2	-779	0	-717	0
Other Amusement and Recreation Industries	-948	10	-1,502	17	-1,399	6
Child Day Care Services	-864	7	-1,006	7	-1,035	-2
Employment Services	-702	0	-1,241	-1	-679	2
Agriculture, Construction, and Mining Machinery Manufacturing	-555	-2	-396	0	-257	-2
Motion Picture and Video Industries	-552	1	-585	3	-633	0
Management, Scientific, and Technical Consulting Services	-517	53	-447	73	-192	6
Clothing Stores	-475	20	-1,142	9	-1,230	3
Architectural, Engineering, and Related Services	-403	-3	-339	3	32	4
Outpatient Care Centers	-369	-11	-329	-8	-74	1
Department Stores	-365	0	-589	0	-602	0
Utility System Construction	-341	4	654	4	32	0
Management of Companies and Enterprises	-321	10	-309	6	-91	2
Machinery, Equipment, and Supplies Merchant Wholesalers	-291	-5	-255	-3	-82	3
Nursing Care Facilities (Skilled Nursing Facilities)	-252	1	-207	-1	-95	0
Traveler Accommodation	-252	4	-304	4	-323	1
Other Schools and Instruction	-237	20	-409	17	-360	1
Special Food Services	-212	2	-200	-5	-192	-1
Nonresidential Building Construction	-193	4	-128	4	-51	0

Thank You!

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