

TEXAS

LABOR MARKET REVIEW



APRIL 2020



The monthly Texas Labor Market Review brings you the most current labor market highlights and happenings across the Lone Star State. The information that follows is produced and published on a monthly basis and includes data on nonagricultural job trends, the labor force, job postings, and other relevant indicators for both the state and sub-state areas. Additional data and historical information is available on our website: TexasLMI.com.

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MARCH 2020 MONTHLY INDICATORS



CES program
Page 2

INDUSTRY EMPLOYMENT
SEASONALLY ADJUSTED

↓ 50,900



LAUS program
Page 5

UNEMPLOYMENT RATE
SEASONALLY ADJUSTED

↑ 4.7%



HWOL
Page 8

HWOL INDEX

↓ 0.3%



More Indicators
Page 10

INITIAL CLAIMS
FOUR-WEEK MOVING AVERAGE

↑ 36,531

CURRENT EMPLOYMENT STATISTICS

Statewide Industry Employment (Seasonally Adjusted)

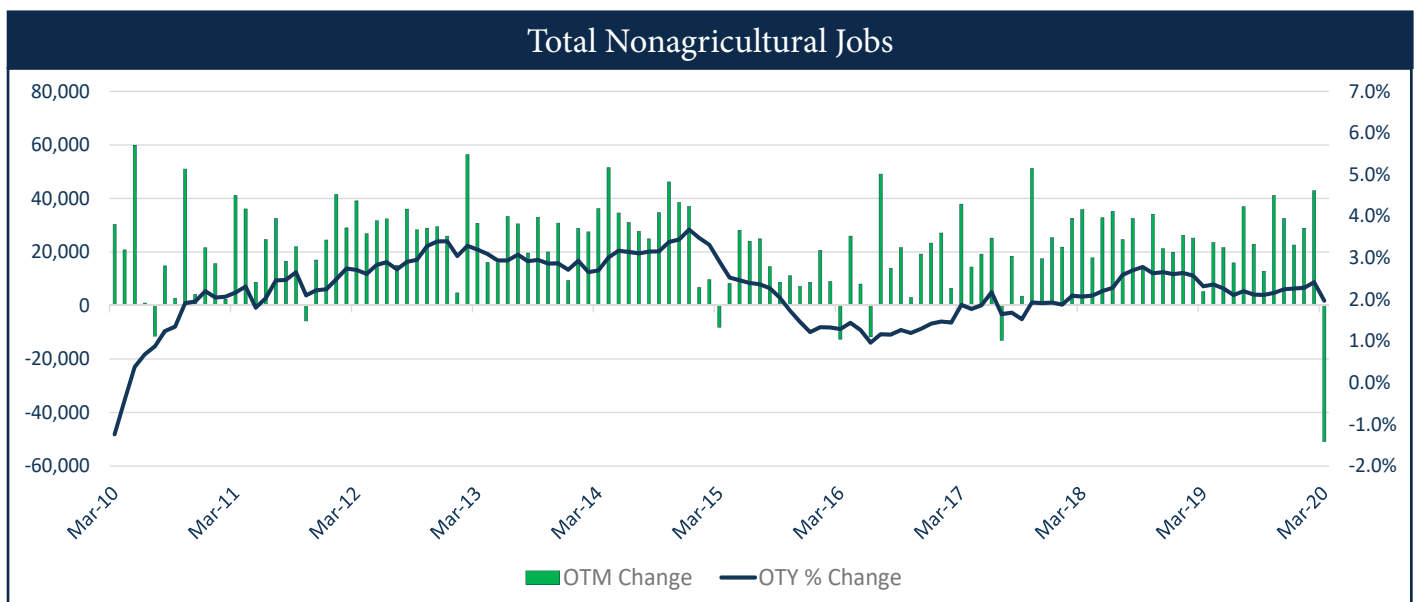
Total Nonagricultural Wage and Salary employment in Texas contracted over the month for the first time in more than two and a half years, shedding 50,900 jobs in March. This represented the fifth largest over-the-month decline in series history beginning in 1990. Private sector employment dropped by 54,300 jobs which contributed to the smallest annual increase since September 2017.

Employment in seven of 11 major industries declined over the month. The Total Nonfarm annual growth rate decreased by 0.4 percentage points from 2.4 percent in February to 2.0 percent in March.

Industry	Mar 2020	Monthly Change	Annual Change	Annual % Change
Total Nonagricultural	12,965,900	-50,900	250,900	2.0
Private	10,970,300	-54,300	216,200	2.0
Goods-Producing	1,929,200	-16,200	5,700	0.3
Mining & Logging	234,700	-2,200	-20,700	-8.1
Construction	790,600	-6,400	26,100	3.4
Manufacturing	903,900	-7,600	300	0.0
Service-Providing	11,036,700	-34,700	245,200	2.3
Trade, Transportation & Utilities	2,545,900	-2,700	42,400	1.7
Information	209,900	100	1,700	0.8
Financial Activities	816,200	3,400	22,300	2.8
Professional & Business Services	1,836,800	-6,300	65,200	3.7
Education & Health Services	1,768,700	-7,700	42,000	2.4
Leisure & Hospitality	1,403,000	-25,900	19,300	1.4
Other Services	460,600	1,000	17,600	4.0
Government	1,995,600	3,400	34,700	1.8

Highlights

- Leisure and Hospitality lost the most jobs of all major industries in March, posting a series high decline of 25,900 jobs. Accommodation and Food Services accounted for the majority of this loss with a decrease of 25,000 positions.
- The Manufacturing industry shed 7,600 jobs over the month, which marked the largest drop since July 2009. Durable Goods employment fell by 3,000 jobs while Non-Durable jobs fell by 4,600 in March.
- The Financial Activities industry tied for the most monthly jobs added among major industries with 3,400 positions in March.



CURRENT EMPLOYMENT STATISTICS

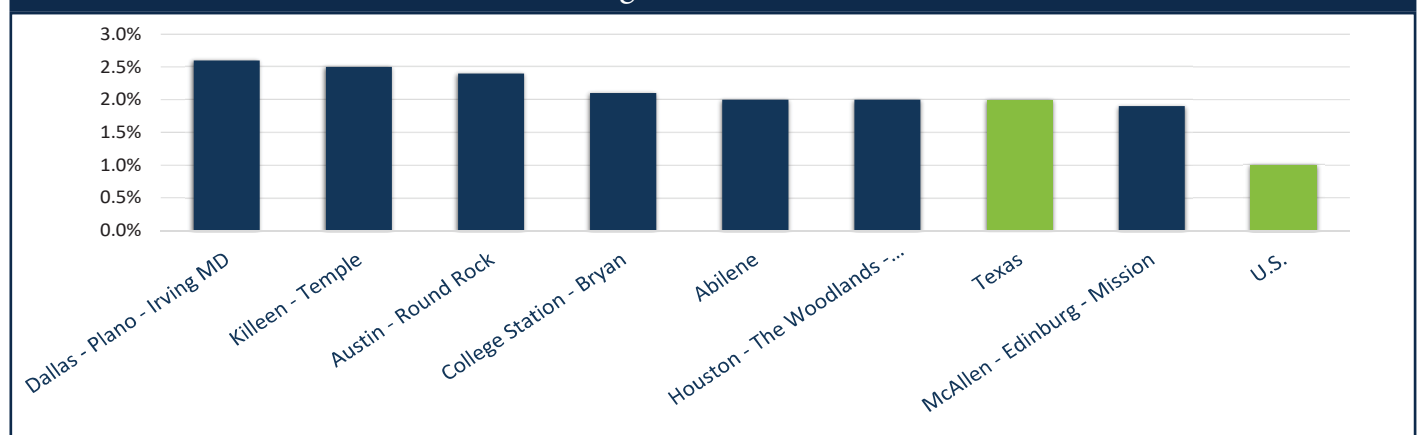
Metro Areas (Seasonally Adjusted)

Metro Areas	Mar 2020	Monthly Change	Annual Change	Annual % Change
Abilene MSA	73,000	-300	1,400	2.0
Amarillo MSA	122,400	-200	2,000	1.7
Austin-Round Rock MSA	1,131,300	-8,400	26,500	2.4
Beaumont-Port Arthur MSA	164,600	-1,300	-800	-0.5
Brownsville-Harlingen MSA	145,500	-400	2,300	1.6
College Station-Bryan MSA	125,300	-500	2,600	2.1
Corpus Christi MSA	193,500	-700	300	0.2
Dallas-FW-Arlington MSA	3,827,700	-37,100	79,100	2.1
Dallas-Plano-Irving MD	2,736,000	-11,100	70,400	2.6
Fort Worth-Arlington MD	1,092,900	-19,900	9,000	0.8
El Paso MSA	328,000	-700	5,400	1.7
Houston MSA	3,202,400	-18,200	64,100	2.0
Killeen-Temple MSA	147,900	100	3,600	2.5
Laredo MSA	108,600	-300	1,200	1.1
Longview MSA	99,000	0	-100	-0.1
Lubbock MSA	151,000	-300	1,100	0.7
McAllen MSA	274,000	-700	5,000	1.9
Midland MSA	115,100	-300	800	0.7
Odessa MSA	82,300	-500	-2,100	-2.5
San Angelo MSA	49,900	-300	-200	-0.4
San Antonio MSA	1,086,800	-5,500	16,200	1.5
Sherman-Denison MSA	48,400	-100	-200	-0.4
Texarkana MSA	61,300	200	800	1.3
Tyler MSA	106,600	-400	-200	-0.2
Victoria MSA	41,100	-300	-700	-1.7
Waco MSA	123,800	-300	1,300	1.1
Wichita Falls MSA	59,600	-500	100	0.2

Highlights

- Employment decreased in 23 of 26 metro areas over the month in March for a total decrease of 71,200 jobs. Two metro areas combined for 300 jobs gained and job growth in one MSA was flat for the month.
- The Fort Worth-Arlington metro area shed the most jobs with a series high loss of 19,900 jobs over the month. The area's annual growth rate dropped to 0.8 percent from 2.8 percent in February 2020.
- The Houston-The Woodlands-Sugar Land MSA lost 18,200 positions over the month, for the largest monthly drop since April 2009.
- Employment in the Dallas-Plano-Irving Metropolitan Division contracted by 11,100 jobs over the month in March.
- The Austin-Round Rock MSA contracted by 8,400 jobs in March. The annual growth rate dipped a full percentage point to 2.4 percent.
- The San Antonio-New Braunfels MSA contracted by 5,500 positions in March, while the annual growth rate declined to 1.5 percent from a January reading of 2.5 percent.

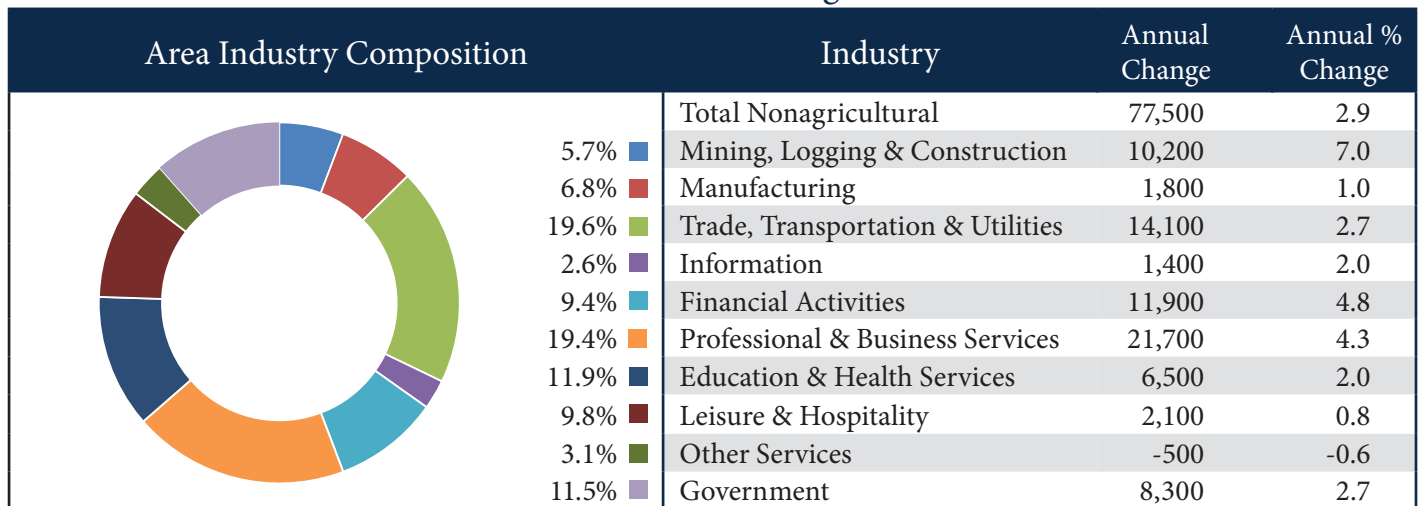
Fastest Growing Metro Areas Over the Year



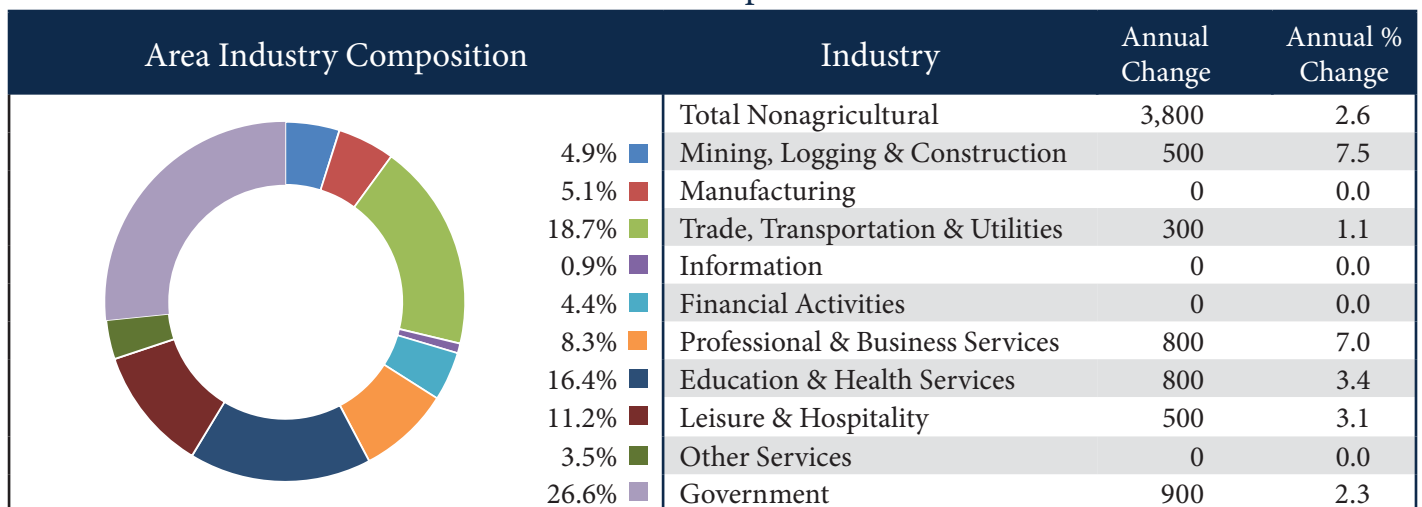
CURRENT EMPLOYMENT STATISTICS

Fastest Growing Metro Areas Over-the-Year (Not Seasonally Adjusted)

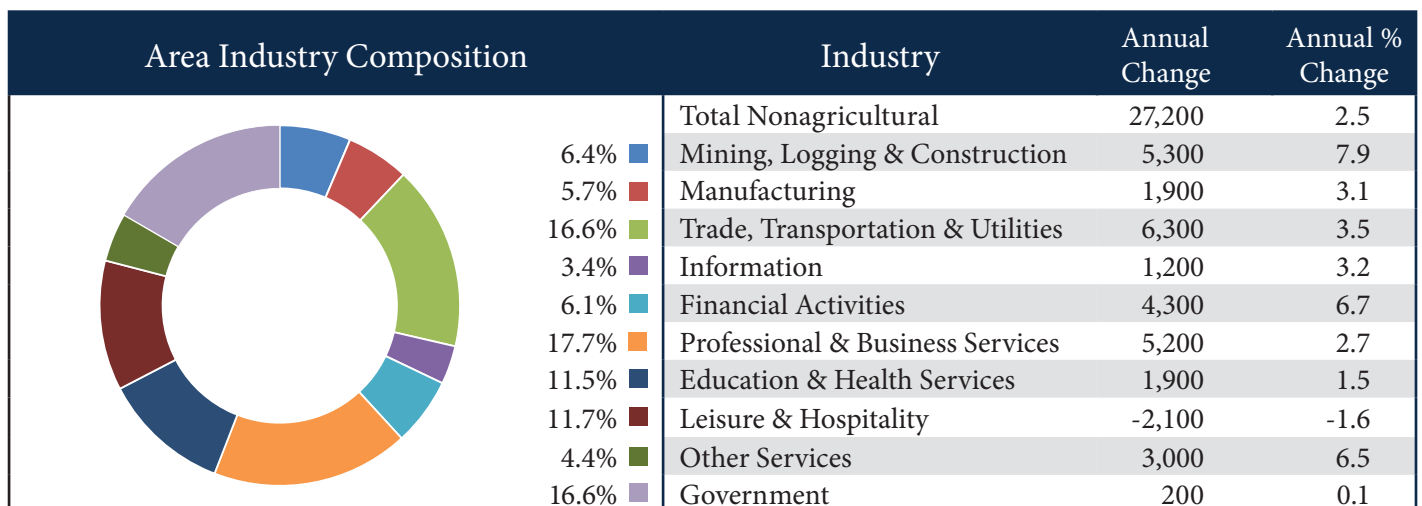
Dallas - Plano - Irving MD



Killeen - Temple MSA



Austin - Round Rock MSA



[Download CES excel data sheets \(include industry-level data\)](#)

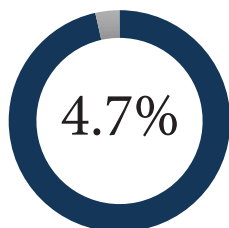
LOCAL AREA UNEMPLOYMENT STATISTICS

Texas & the U.S. (Seasonally Adjusted)

Texas March 2020

■ Employed
13,354,600

■ Unemployed
664,800

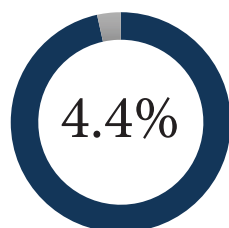


Date	CLF	Employment	Unemployment	Rate
Mar 2020	14,019,300	13,354,600	664,800	4.7
Feb 2020	14,199,600	13,707,100	492,500	3.5
Mar 2019	13,939,700	13,447,800	491,900	3.5

U.S. March 2020

■ Employed
155,772,000

■ Unemployed
7,140,000

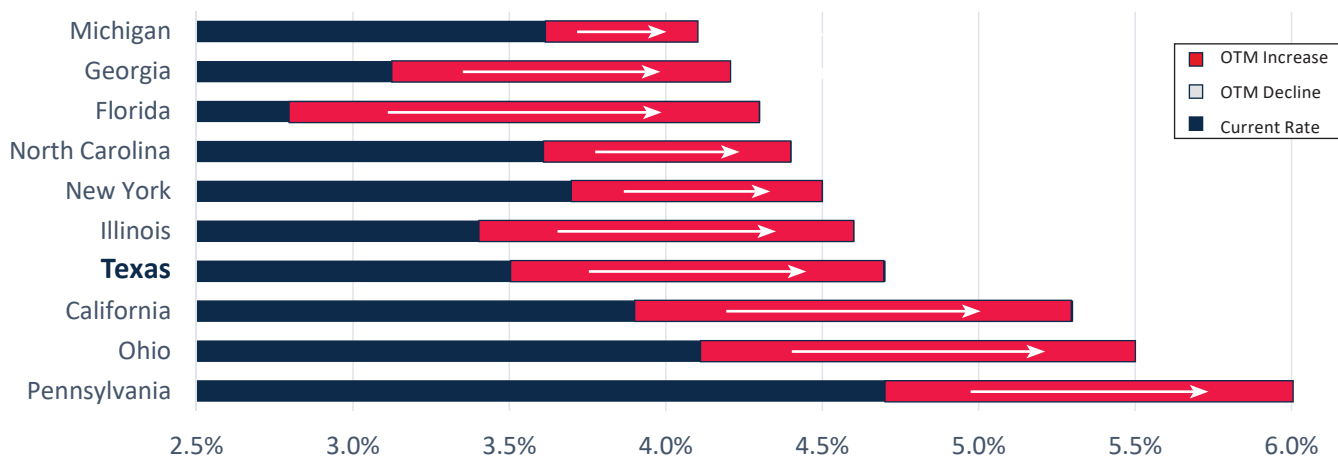


Date	CLF	Employment	Unemployment	Rate
Mar 2020	162,913,000	155,772,000	7,140,000	4.4
Feb 2020	164,546,000	158,759,000	5,787,000	3.5
Mar 2019	162,935,000	156,741,000	6,194,000	3.8

Highlights

- Over the month the Texas seasonally adjusted unemployment rate rose to 4.7 percent, three-tenths of a percentage point higher than the U.S. rate of 4.4 percent.
- The state's seasonally adjusted labor force participation rate was 63.2 percent in March.
- Texas' seasonally adjusted LAUS employment was down 352,500 from last month.
- Summarizing the not seasonally adjusted estimates, the Texas unemployment rate increased to 4.7 percent in March. This was 1.2 percentage points higher than the unemployment rate in March 2019.

10 Largest States' Unemployment Rates



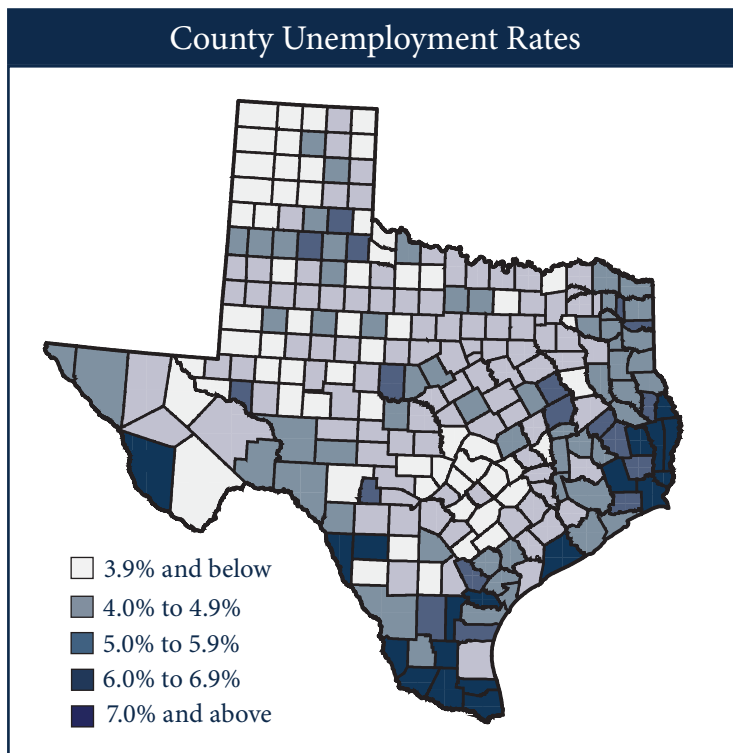
LOCAL AREA UNEMPLOYMENT STATISTICS

Substate Areas (Not Seasonally Adjusted)

County Highlights

- Unemployment rates varied considerably across counties, ranging from a low of 0.7 percent in Loving County to a high of 16.0 percent in Starr County.
- Ten counties had an unemployment rate of 3.0 percent or less.
- Loving County experienced the largest unemployment rate decrease of 0.3 percentage points over the year.
- In March 2020, unemployment rates increased over the month in all counties.
- Over the year, the civilian labor force increased in 135 counties, while 117 counties in the state experienced a decline and two experienced no change.

County Unemployment Rates



Texas Metro Areas Ranked by Unemployment Rate

Rank	Area	Rate	Rank	Area	Rate
1	Midland	3.1	13	Waco	4.5
2	Amarillo	3.4	0	Texas	4.7
3	Austin-Round Rock	3.5	15	Killeen-Temple	4.9
4	College Station-Bryan	3.7	16	El Paso	5.0
4	Lubbock	3.7	17	Houston-The Woodlands-Sugar Land	5.1
6	Abilene	4.0	17	Victoria	5.1
6	San Angelo	4.0	19	Laredo	5.2
8	San Antonio-New Braunfels	4.2	20	Longview	5.3
8	Wichita Falls	4.2	21	Texarkana	5.4
10	Dallas-Fort Worth-Arlington	4.3	22	Corpus Christi	5.7
10	Sherman-Denison	4.3	23	Brownsville-Harlingen	7.4
12	Odessa	4.4	24	Beaumont-Port Arthur	7.5
0	United States	4.5	25	McAllen-Edinburg-Mission	8.5
13	Tyler	4.5			

Metro Area Highlights

- Over the month, all 25 metropolitan areas experienced an increase in their unemployment rates.
- Over the year, all Texas metropolitan areas experienced an increase in their unemployment rates. The McAllen-Edinburg-Mission MSA experienced the largest over the year change, rising 2.8 percentage points.

CURRENT POPULATION SURVEY

12-Month Moving Average Unemployment Rates

Texas Unemployment Rates by Demographic

Gender (age 16+)	Mar 2020	Feb 2020	Mar 2019
Female	3.7%	3.6%	4.0%
Male	3.4%	3.3%	3.6%

Age (16+)	Mar 2020	Feb 2020	Mar 2019
Age 16-19	12.9%	12.5%	12.3%
Age 20-24	6.3%	6.2%	7.4%
Age 25-34	4.0%	3.8%	3.4%
Age 35-44	2.3%	2.1%	2.7%
Age 45-54	2.5%	2.5%	2.6%
Age 55-64	2.3%	2.2%	3.0%
Age 65+	2.5%	2.4%	2.9%

Race (age 16+)	Mar 2020	Feb 2020	Mar 2019
White	3.3%	3.2%	3.5%
Black	5.4%	5.1%	5.4%
Hispanic	4.3%	4.1%	4.1%

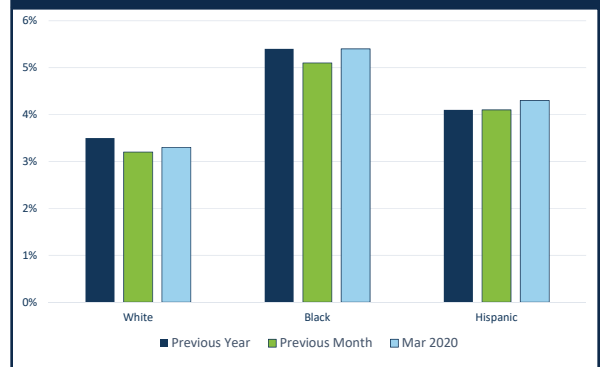
Other Categories (age 18+)	Mar 2020	Feb 2020	Mar 2019
Veterans	3.3%	3.3%	2.8%

Education (age 25+)	Mar 2020	Feb 2020	Mar 2019
Less than High School	4.0%	3.6%	3.4%
High School Diploma	3.8%	3.5%	3.2%
Some College or Associate Degree	2.7%	2.6%	3.2%
Bachelor's Degree or Higher	1.9%	1.9%	2.4%

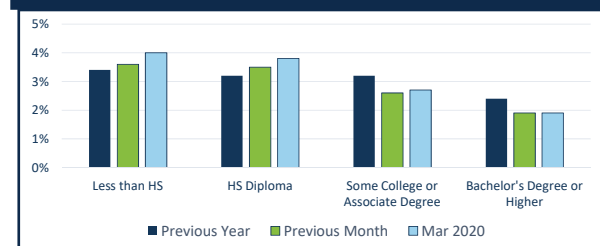
Highlights

- The unemployment rate for males decreased by 0.2 percentage points over the year to a rate of 3.4 percent, while the rate for women decreased by 0.3 percentage points to 3.7 percent.
- The veteran unemployment rate over the month remained at 3.3 percent in March.
- Individuals with some college education or associate degree had an unemployment rate of 2.7 percent. Those with a bachelor's degree and higher had an unemployment rate of 1.9 percent and those with a high school diploma had a rate of 3.8 percent.
- Of the new entrants into Texas' labor force in February, more were men (25,600) than women (23,800).
- The number of people not in the labor force because they are discouraged over job prospects in Texas increased to 33,500, up from a level of 31,600 a year ago.

Unemployment Rates by Race



Unemployment Rates by Education

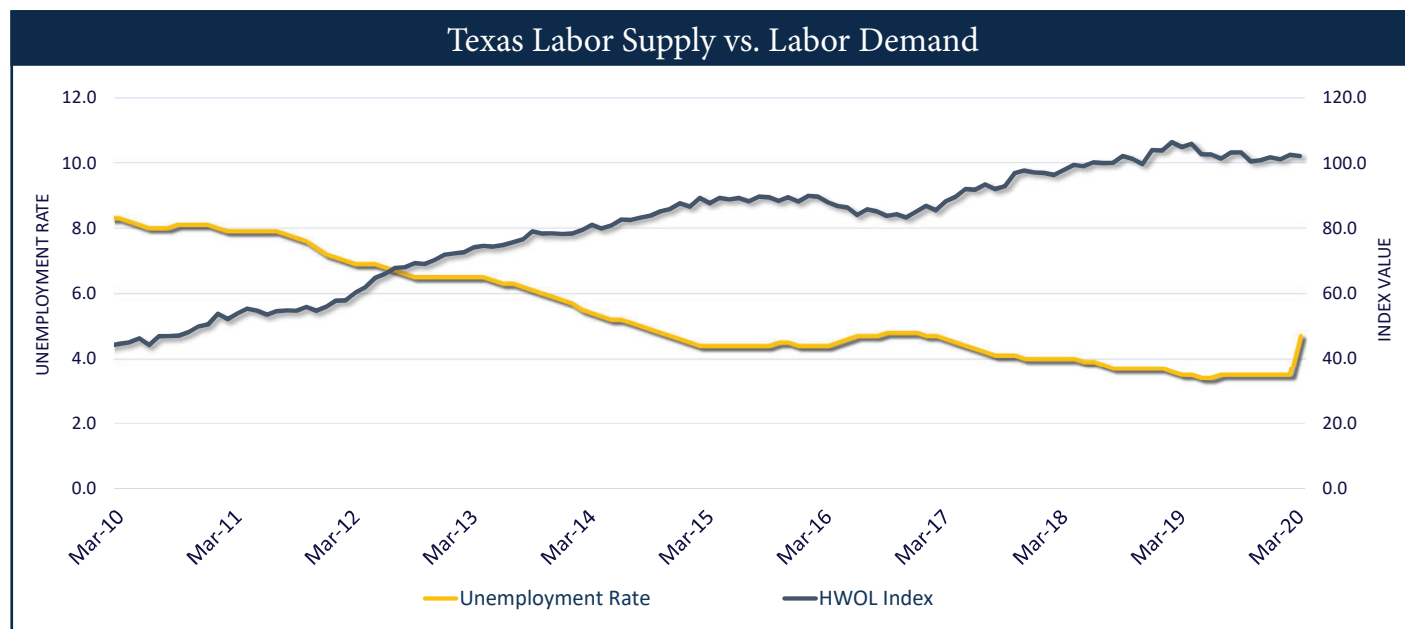


[Download all LAUS excel data sheets](#)



HELP WANTED ONLINE

Statewide Online Job Postings Data (Seasonally Adjusted)



Highlights

- The Conference Board Experimental Help Wanted OnLine® (HWOL) Index decreased over the month to 102.2 in March, a decrease of three-tenths of a percentage point.
- The March Supply/Demand rate was 1.2 unemployed for each advertised vacancy with a total of 113,574 more unemployed workers than advertised vacancies.

Top Employers by Postings

Employer	Mar 2020
Hospital Corporation of America	3,048
Baylor Scott & White Health	2,346
Christus Health	2,195
Houston Methodist	2,131
Languageline Solutions	1,876
Lowe's Companies, Inc	1,796
The Home Depot Incorporated	1,631
UnitedHealth Group	1,587
IBM	1,569
Anthem Blue Cross	1,553

Top Occupations by Postings

Occupation	Mar 2020
Registered Nurses	22,262
Software Developers, Applications	20,610
Sales Representatives, Wholesale and Manuf., Except Technical and Scientific Products	18,555
Computer Occupations, All Other	16,100
Retail Salespersons	14,712
Customer Service Representatives	14,402
Managers, All Other	12,329
First-Line Supervisors of Retail Sales Workers	11,725
Heavy and Tractor-Trailer Truck Drivers	8,281
Sales Managers	6,476

EMPLOYMENT NEWS

Media Update

Job Gains

Amazon Hiring Nearly 6,000 in Texas

Dallas Business Journal

DALLAS, TX — Amazon’s ramp-up on jobs means thousands for Texas, and many are coming to the Dallas area. The massive online retailer is hiring 100,000 folks – with about 3,300 for North Texas, a spokesperson said. For all of the Lone Star State, about 5,900 are slated.

The surge in hiring comes amid growing demand for home-delivered products as more people stay home to work or study amid concerns about the coronavirus. Amazon isn’t just hiring more people, but is increasing pay as well, boosting hourly wages by \$2 an hour from \$15 or more through April, depending on the region. Amazon has been expanding its staff and adding to its facilities in the Dallas area as the region grows. In March, North Texas was among the first to get even quicker same-day deliveries that used a more efficient approach that’s creating hundreds of jobs.

Many North Texas Businesses Are Hiring

Fort Worth Star-Telegram

FORT WORTH, TX — Not all Texas businesses are hurting in the time of novel coronavirus-related shutdowns. State and local mandates aimed at curbing the spread of the new virus have forced the closure of dine-in restaurants, bars, theaters and non-essential retail businesses. But in Fort Worth, and across the country, some industries are plucking along at a healthy pace — and hiring. Grocery stores like Walmart and Albertsons have announced major hiring initiatives alongside Amazon. That could be good news for service industry folks looking for a new gig.

Pia Orrenius, a senior economist at the Dallas Federal Reserve, said she’s not overly optimistic about the economy for the next few months, but flexible labor markets in Texas will likely help the region weather an economic downturn. Any company that makes, or can make, medical-grade masks, gowns and related supplies will have high-demand products, Orrenius said, calling sales “off the charts.” Prestige Ameritech of North Richland Hills is the largest provider of surgical masks in the United States.

Job Losses

Half Price Books Slashes Ranks

Dallas Morning News

DALLAS, TX — Dallas-based retailer Half Price Books has laid off or furloughed 78% of its staff just two weeks after temporarily closing its stores to comply with social distancing measures across the nation. The book retailer laid off or furloughed 2,146 of its employees, the company confirmed to The Dallas Morning News. The remaining several hundred employees are expected to see a decrease in scheduled hours or a pay cut that will vary based on salary.

The workforce reductions are a result of store closures stemming from the coronavirus pandemic, according to a statement from the company. “It was a very difficult decision, but one we had to make for the purpose of saving the company, and to come out on the other side of this crisis,” Half Price Books chief strategy officer Kathy Doyle Thomas said in a statement.

North Texas Hotels Not Just Laying Off

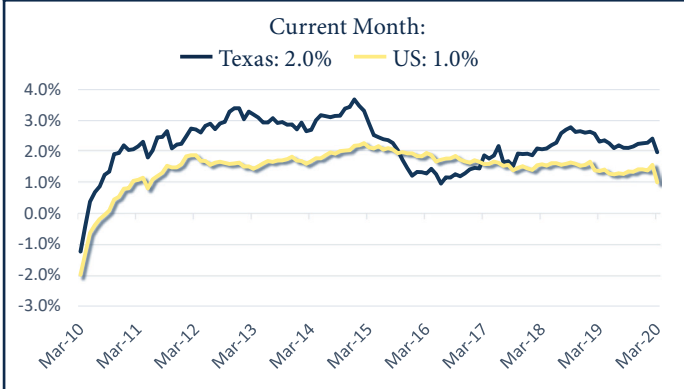
Dallas Business Journal

DALLAS, TX — Most of the hotels that laid off a combined 700 employees in March in North Texas are closed or could close until the coronavirus outbreak ends. Six Dallas-Fort Worth hotels laid off 693 workers March 16-20, according to Worker Adjustment and Retraining Notification Act notices received by the Texas Workforce Commission. All six cited the COVID-19 crisis and its impact on travel and tourism as the reason for the layoffs.

The North Texas hotels making the layoffs in most cases said they couldn’t meet the 60-day notice requirement because the coronavirus hit their business and occupancy fast and unexpectedly.

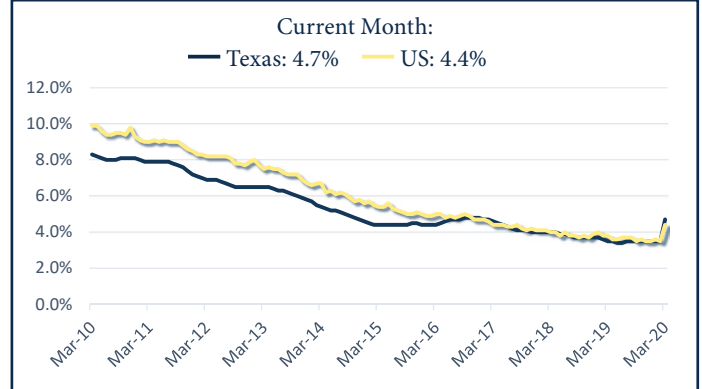
KEY INDICATORS

Total Nonag Annual Employment Growth (Seasonally Adjusted)



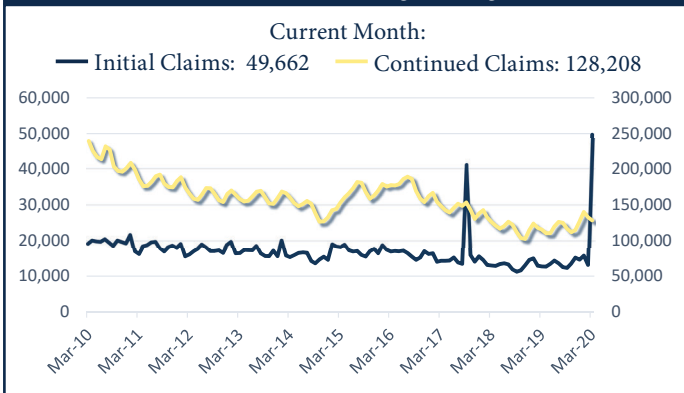
Source: TWC/Bureau of Labor Statistics

Unemployment Rates (Seasonally Adjusted)



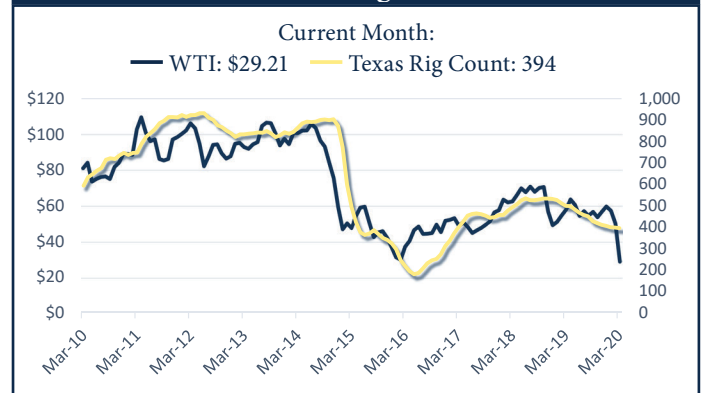
Source: TWC/Bureau of Labor Statistics

Initial and Continued Claims (Four-Week Moving Average)



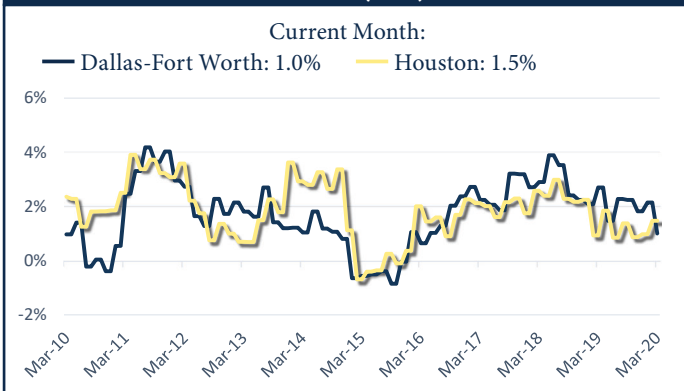
Source: TWC

West Texas Intermediate Crude Oil vs. Texas Rig Count



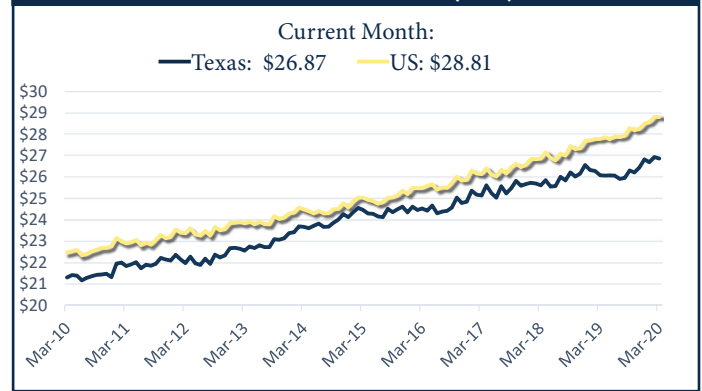
Source: US Energy Information Administration (EIA) & Baker Hughes

Consumer Price Index Annual Growth (Not Seasonally Adjusted)



Source: Bureau of Labor Statistics

Average Hourly Earnings (Total Private, Not Seasonally Adjusted)



Source: Bureau of Labor Statistics

[Download Key Indicators data in excel](#)



GLOSSARY

CURRENT EMPLOYMENT STATISTICS

This Federal/State cooperative program produces estimates drawn from a monthly survey of nonfarm business establishments used to collect wage and salary employment, worker hours and payroll by industry and area. It counts the number of jobs, not of people.

Nonagricultural Jobs - The total number of persons on establishment payrolls employed full or part time. Persons on the payroll of more than one establishment are counted in each. Data exclude proprietors, self-employed, unpaid family or volunteer workers, farm workers, and domestic workers. Government employment only covers civilian employees.

Actual or Not Seasonally Adjusted - Describes the data series not subject to the seasonal adjustment process. In other words, the effects of regular, or seasonal, patterns have not been removed from these series.

Seasonally Adjusted - The effects of regular, or seasonal, patterns of hiring or layoffs (holidays, weather, etc.) have been removed from these series. These adjustments make it easier to observe the cyclical and other non-seasonal movements in a data series.

HELP WANTED ONLINE

The Conference Board Help Wanted OnLine® (HWOL) data series and index (July 2018=100) provides monthly measures of labor demand (advertised vacancies) at the national, regional, state, and metropolitan area levels.

Supply-Demand rate - A ratio measuring the number of unemployed persons per Help Wanted Online job openings.

INDICATORS

Initial Claims - A count of notices of unemployment received requesting a determination of eligibility for UI benefits. A person can file multiple claims.

Continued Claims - A count of claimants who have qualified for and are receiving UI benefits.

Consumer Price Index - An index of the variation in prices paid by typical consumers for retail goods and other items.

LOCAL AREA UNEMPLOYMENT STATISTICS

This Federal/State cooperative program produces employment and unemployment estimates by place of residence.

Employed - All persons 16 years and over who, during the reference week, (a) did any work at all (at least 1 hour) as paid employees, worked on their own business, profession, or on their own farm, or worked 15 hours or more as unpaid family workers, or (b) were not working but who had jobs from which they were temporarily absent. Each employed person is counted only once, even if the person holds more than one job.

Unemployed - All persons aged 16 years and over who had no employment, were available for work, and had made specific efforts to find employment. Includes persons who were waiting to be recalled to jobs from which they had been laid off.

Civilian Labor Force (CLF) - All persons classified as employed or unemployed.

Unemployment Rate - The unemployed number divided by the civilian labor force number.

MISCELLANEOUS

Metropolitan Division (MD) - A Metropolitan Statistical Area with a population of 2.5 million which is subdivided into smaller groupings is referred to as Metropolitan Divisions (MDs).

Metropolitan Statistical Area (MSA) - A geographic area that contains at least one urbanized center of 50,000 or more population plus adjacent territory that has a high degree of social and economic integration with the core urban location. An MSA in Texas is made up of one or more counties.

Metro Area - Can refer either to a Metropolitan Statistical Area or a Metropolitan Division. Texas has 25 MSAs, including the Dallas-Fort Worth-Arlington MSA which is subdivided into two MDs.

Workforce Development Area (WDA) - The State of Texas is divided into twenty-eight (28) local workforce development areas.

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