

Industry Snapshot

Energy

Emsi Q2 2018 Data Set

April 2018



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Parameters

Industries

17 items selected. See Appendix A for details.

Regions

| Code | Description |
|-------|---------------------------------|
| 19100 | Dallas-Fort Worth-Arlington, TX |

Timeframe

-

Datarun

2018.2 - Employees

Energy Targeted Industry in Dallas-Fort Worth-Arlington, TX

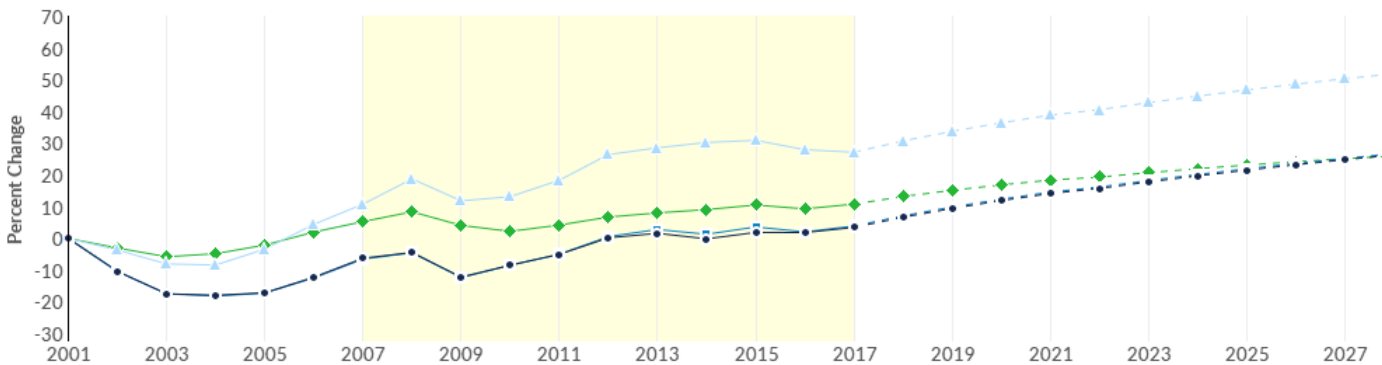
Industry Summary for Energy Targeted Industry

| | | |
|----------------------------------------------------------------------------|------------------------------------------------------------------------|--------------------------------------------------------------------------------|
| <p>38,973 Jobs (2017) 10% below National average</p> | <p>+10.4% % Change (2007-2017) Nation: +5.2%</p> | <p>\$116,787 Avg. Earnings Per Job (2017) Nation: \$117,952</p> |
|----------------------------------------------------------------------------|------------------------------------------------------------------------|--------------------------------------------------------------------------------|

Industry Detail

| | |
|-------------------------------------|----------------------------|
| Payrolled Business Locations (2017) | 1,723 |
| Jobs Multiplier | 4 |
| Unemployed | Only Available for 2-Digit |

Regional Trends



| Region | 2007 Jobs | 2017 Jobs | Change | % Change |
|----------------------------|-----------|-----------|--------|----------|
| ● Region | 35,309 | 38,973 | 3,664 | 10.4% |
| ■ WSNCT Dallas and Tarrant | 35,752 | 39,750 | 3,998 | 11.2% |
| ▲ State | 178,526 | 204,924 | 26,398 | 14.8% |
| ◆ Nation | 1,738,001 | 1,829,077 | 91,076 | 5.2% |

Occupations Employed by these Industries

| Description | Employed in Industry Group (2017) | % of Total Jobs in Industry Group (2017) |
|------------------------------------------------|-----------------------------------|------------------------------------------|
| Civil Engineers | 2,953 | 7.6% |
| Electrical Power-Line Installers and Repairers | 2,110 | 5.4% |
| Construction Laborers | 1,699 | 4.4% |
| Electrical Engineers | 1,215 | 3.1% |
| Office Clerks, General | 1,192 | 3.1% |

Industry Gender Breakdown



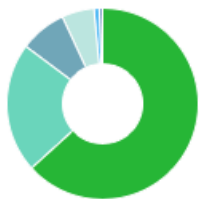
| Gender | 2017 Jobs | 2017 Percent |
|-----------|-----------|--------------|
| ● Males | 29,025 | 74.5% |
| ● Females | 9,949 | 25.5% |

Industry Age Breakdown



| Age | 2017 Jobs | 2017 Percent |
|---------|-----------|--------------|
| ● 14-18 | 127 | 0.3% |
| ● 19-24 | 2,606 | 6.7% |
| ● 25-34 | 9,812 | 25.2% |
| ● 35-44 | 9,242 | 23.7% |
| ● 45-54 | 8,267 | 21.2% |
| ● 55-64 | 6,882 | 17.7% |
| ● 65+ | 2,037 | 5.2% |

Industry Race/Ethnicity Breakdown



| Race/Ethnicity | 2017 Jobs | 2017 Percent |
|-------------------------------------------|-----------|--------------|
| White | 24,660 | 63.3% |
| Hispanic or Latino | 8,549 | 21.9% |
| Black or African American | 3,074 | 7.9% |
| Asian | 2,123 | 5.4% |
| Two or More Races | 348 | 0.9% |
| American Indian or Alaska Native | 179 | 0.5% |
| Native Hawaiian or Other Pacific Islander | 41 | 0.1% |

Industry Requirements

| Purchases from | In-region Purchases | Imported Purchases | Total Purchases |
|----------------------------|---------------------|--------------------|-----------------|
| Crude Petroleum Extraction | \$209,849,596 | \$200,174 | \$210,049,771 |
| Engineering Services | \$178,745,761 | \$8,792,361 | \$187,538,122 |
| Petroleum Refineries | \$32,308,565 | \$153,677,714 | \$185,986,279 |
| Temporary Help Services | \$135,136,696 | \$943,958 | \$136,080,654 |
| Commercial Banking | \$132,195,619 | \$426,044 | \$132,621,663 |

Top Regional Businesses

| Business Name | Industry Name | Business Size |
|------------------------------------|------------------------------------------|---------------|
| Energy Future Holdings Corporation | Other Electric Power Generation (221118) | 1,380 |
| Fluor Corporation | Engineering Services (541330) | 900 |
| Txu Energy | Other Electric Power Generation (221118) | 575 |
| Computer Sciences Parsons Llc | Engineering Services (541330) | 400 |
| L-3 Communications | Engineering Services (541330) | 391 |

Business Data by DatabaseUSA.com is third-party data provided by Emsi to its customers as a convenience, and Emsi does not endorse or warrant its accuracy or consistency with other published Emsi data.

Appendix A - Industries

| Code | Description |
|--------|------------------------------------------------------------------|
| 212111 | Bituminous Coal and Lignite Surface Mining |
| 212112 | Bituminous Coal Underground Mining |
| 212113 | Anthracite Mining |
| 221111 | Hydroelectric Power Generation |
| 221112 | Fossil Fuel Electric Power Generation |
| 221113 | Nuclear Electric Power Generation |
| 221114 | Solar Electric Power Generation |
| 221115 | Wind Electric Power Generation |
| 221116 | Geothermal Electric Power Generation |
| 221117 | Biomass Electric Power Generation |
| 221118 | Other Electric Power Generation |
| 221121 | Electric Bulk Power Transmission and Control |
| 221122 | Electric Power Distribution |
| 221210 | Natural Gas Distribution |
| 237120 | Oil and Gas Pipeline and Related Structures Construction |
| 237130 | Power and Communication Line and Related Structures Construction |
| 541330 | Engineering Services |

Appendix B - Data Sources and Calculations

Industry Data

Emsi industry data have various sources depending on the class of worker. (1) For QCEW Employees, Emsi primarily uses the QCEW (Quarterly Census of Employment and Wages), with supplemental estimates from County Business Patterns. (2) Non-QCEW employees data are based on a number of sources including QCEW, Current Employment Statistics, County Business Patterns, BEA State and Local Personal Income reports, the National Industry-Occupation Employment Matrix (NIOEM), the American Community Survey, and Railroad Retirement Board statistics. (3) Self-Employed and Extended Proprietor classes of worker data are primarily based on the American Community Survey, Nonemployer Statistics, and BEA State and Local Personal Income Reports. Projections for QCEW and Non-QCEW Employees are informed by NIOEM and long-term industry projections published by individual states.

Input-Output Data

The input-output model in this report is Emsi's gravitational flows multi-regional social account matrix model (MR-SAM). It is based on data from the Census Bureau's Current Population Survey and American Community Survey; as well as the Bureau of Economic Analysis' National Income and Product Accounts, Input-Output Make and Use Tables, and Gross State Product data. In addition, several Emsi in-house data sets are used, as well as data from Oak Ridge National Labs on the cost of transportation between counties.

Staffing Patterns Data

The staffing pattern data in this report are compiled from several sources using a specialized process. For QCEW and Non-QCEW Employees classes of worker, sources include Occupational Employment Statistics, the National Industry-Occupation Employment Matrix, and the American Community Survey. For the Self-Employed and Extended Proprietors classes of worker, the primary source is the American Community Survey, with a small amount of information from Occupational Employment Statistics.

DatabaseUSA.com Business-Level Data

Data for individual businesses is provided by DatabaseUSA.com, which maintains a database of more than 14 million U.S. business entities. Note that in aggregate it will not be consistent with Emsi labor market data due to differences in definitions, methodology, coverage, and industry/geographic classification.

State Data Sources

This report uses state data from the following agencies: Texas Workforce Commission

Industry Snapshot of Energy Targeted Industry in Dallas-Fort Worth-Arlington, TX MSA, 2017q4

| NAICS | Industry | Current | | | 5-Year History | | | 10-Year Forecast | | | | |
|--------|------------------------------------------------------------------|----------------------------------|---------------|------|----------------|---------------------|-----------------------|------------------|---------------------------|-----------|---------|--------------|
| | | Four Quarters Ending with 2017q4 | | | Total Change | Empl Last 'n' Years | Avg Ann % Chg in Empl | Total New Demand | Separations (Approximate) | | Growth | |
| | | Empl | Avg Ann Wages | LQ | Empl | 1 3 5 | Region | | Exits | Transfers | Empl | Avg Ann Rate |
| 211120 | Crude Petroleum Extraction | 9,427 | \$225,993 | 3.33 | -1,329 | | -2.6% | 12,245 | 3,268 | 6,342 | 2,635 | 2.5% |
| 211130 | Natural Gas Extraction | 2,281 | \$118,960 | 2.28 | -1,636 | | -10.2% | 2,920 | 787 | 1,528 | 605 | 2.4% |
| 212111 | Bituminous Coal and Lignite Surface Mining | 549 | \$99,550 | 0.95 | 99 | | 4.0% | 577 | 192 | 388 | -3 | 0.0% |
| 212112 | Bituminous Coal Underground Mining | 8 | \$93,273 | 0.01 | 7 | | 56.4% | 9 | 3 | 6 | 0 | 0.3% |
| 221111 | Hydroelectric Power Generation | 41 | \$83,538 | 0.10 | 30 | | 29.3% | 50 | 14 | 27 | 9 | 2.0% |
| 221112 | Fossil Fuel Electric Power Generation | 937 | \$119,468 | 0.35 | -60 | | -1.2% | 789 | 280 | 535 | -25 | -0.3% |
| 221113 | Nuclear Electric Power Generation | 684 | \$156,301 | 0.59 | -137 | | -3.6% | 623 | 225 | 396 | 2 | 0.0% |
| 221114 | Solar Electric Power Generation | 6 | \$66,959 | 0.09 | 4 | | 29.6% | 14 | 3 | 5 | 7 | 7.8% |
| 221115 | Wind Electric Power Generation | 388 | \$98,436 | 2.62 | 268 | | 26.6% | 1,077 | 199 | 336 | 542 | 9.1% |
| 221117 | Biomass Electric Power Generation | 2 | \$14,889 | 0.04 | 1 | | 12.8% | 2 | 1 | 1 | 0 | 1.8% |
| 221118 | Other Electric Power Generation | 5 | \$14,889 | 0.12 | -2 | | -5.9% | 6 | 2 | 3 | 1 | 1.8% |
| 221121 | Electric Bulk Power Transmission and Control | 186 | \$121,857 | 0.23 | 61 | | 8.2% | 199 | 62 | 111 | 25 | 1.3% |
| 221122 | Electric Power Distribution | 5,577 | \$119,241 | 0.89 | -74 | | -0.3% | 5,942 | 1,863 | 3,338 | 741 | 1.3% |
| 221210 | Natural Gas Distribution | 1,585 | \$134,794 | 0.55 | -64 | | -0.8% | 1,479 | 520 | 941 | 18 | 0.1% |
| 237120 | Oil and Gas Pipeline and Related Structures Construction | 2,104 | \$84,280 | 0.61 | 258 | | 2.7% | 3,417 | 893 | 1,657 | 867 | 3.5% |
| 237130 | Power and Communication Line and Related Structures Construction | 7,289 | \$68,329 | 1.63 | 1,265 | | 3.9% | 11,936 | 2,870 | 5,483 | 3,583 | 4.1% |
| 541330 | Engineering Services | 22,325 | \$98,563 | 0.89 | -31 | | 0.0% | 25,213 | 7,093 | 12,901 | 5,219 | 2.1% |
| | Energy Targeted Industry | 53,394 | \$120,953 | 1.02 | -1,340 | | -0.5% | n/a | 0 | 0 | 14,226 | 2.4% |
| | Total - All Industries | 3,732,465 | \$59,188 | 1.00 | 484,114 | | 2.8% | 5,135,893 | 1,898,220 | 2,534,060 | 703,613 | 1.7% |

Source: JobsEQ®
 Data as of 2017Q4
 Note: Figures may not sum due to rounding.