

PROFESSIONAL, SCIENTIFIC, AND TECHNICAL SERVICES

The professional, scientific, and technical Services sector comprises establishments that specialize in performing professional, scientific, and technical activities for others. These activities require a high degree of expertise and training. The establishments in this sector specialize according to expertise and provide these services to clients in a variety of industries. Activities performed include: legal advice and representation; accounting, bookkeeping, and payroll services; architectural, engineering, and specialized design services; computer services; consulting services; research services; advertising services; photographic services; translation and interpretation services; veterinary services; and other professional, scientific, and technical services. The distinguishing feature of the Professional, Scientific, and Technical Services subsector is the fact that most of the industries grouped in it have production processes that are almost wholly dependent on worker skills. Thus, the establishments classified in this subsector sell expertise. Much of the expertise requires degrees, though not in every case.

Professional, scientific, and technical services industries typically pay well and require a high degree of experience and education. This single cluster in Richmond supports all of the other clusters. Demand across the spectrum of key Richmond clusters for more professional, scientific, and technical services will continue to grow. Attracting more of these professionals should be considered to be a key focus for economic development efforts. Richmond's housing market – not as tight as elsewhere in the greater Houston area – and Richmond's excellent schools are offerings that attract

these professionals. Good housing values and strong schools are also a stronger advantage for Richmond than in many other parts of the area and Texas.

Twenty-eight industry sectors make up the professional, scientific, and technical services cluster in Richmond. See Table 2.3 on the next page for the full list of industry sectors. Table 2.3 provides an overview for each of the individual industry sectors that comprise the professional, scientific, and technical services cluster in Richmond.

Included are historic, current, and projected employment; historic and projected average annual percent growth (or decline); historic and current employment concentration (LQ); average earnings; gross regional product (GRP); and jobs multipliers. The table is sorted largest to smallest by 2017 sector contribution to GRP.

The professional, scientific, and technical services cluster accounted for 1,532 jobs in 2017, and has an LQ of 1.8. This means that overall employment for this cluster is 1.8 times more concentrated in Richmond than would be expected based on national employment averages (see Location Quotient within the Introduction). An LQ of 1.8 offers considerable hope for economic development. This shows that Richmond has a good foundation to encourage even more intensity, density, and growth for the cluster. As a whole, the cluster experienced extremely strong job growth at 35% over the last five years as activity in most of the other key clusters picked up following the recession. The industry is expected to experience continued strong growth (see Table 2 above) of 19% in total over the

TABLE 2.3F. PROFESSIONAL, SCIENTIFIC, AND TECHNICAL SERVICES CLUSTER INDUSTRY EMPLOYMENT TRENDS, RICHMOND

PROFESSIONAL, SCIENTIFIC, AND TECHNICAL SERVICES CLUSTER	2012 JOBS	2017 JOBS	% CHANGE IN JOBS 2012-2017	2022 JOBS	% CHANGE IN JOBS 2017-2022	2017 LOCATION QUOTIENT	AVG. EARNINGS PER JOB	JOBS MULTIPLIER	2017 GRP	INDUSTRY SECTOR % SHARE OF CLUSTER GRP
Offices of Lawyers	186	211	13%	232	10%	1.08	\$71,307	1.1	\$30,591,912	18%
All Other Professional, Scientific, and Technical Services	63	92	46%	115	24%	2.37	\$60,910	1.0	\$20,010,271	12%
Management Consulting Services	95	138	45%	174	26%	1.23	\$69,951	1.1	\$14,186,712	8%
Other Accounting Services	82	121	48%	148	23%	2.07	\$57,125	1.1	\$12,066,090	7%
Engineering Services	59	73	24%	86	17%	0.48	\$140,544	1.3	\$11,210,865	7%
Computer Systems Design Services	74	95	28%	113	19%	0.59	\$88,736	1.1	\$11,073,291	7%
Other Scientific and Technical Consulting Services	57	77	35%	92	21%	2.03	\$79,566	1.1	\$9,101,225	5%
Veterinary Services	117	156	33%	180	15%	2.58	\$47,223	1.1	\$7,543,209	5%
Tax Preparation Services	67	108	61%	144	33%	4.92	\$40,313	1.0	\$6,978,819	4%
Custom Computer Programming Services	60	64	7%	72	12%	0.43	\$83,550	1.1	\$6,802,847	4%
Process, Physical Distribution, and Logistics Consulting Services	49	77	57%	94	23%	3.66	\$64,215	1.1	\$6,166,515	4%
Payroll Services	59	45	(24%)	52	15%	1.69	\$85,957	1.1	\$5,485,717	3%
Corporate, Subsidiary, and Regional Managing Offices	10	27	170%	40	46%	0.08	\$113,739	1.2	\$3,427,963	2%
Building Inspection Services	13	35	169%	44	28%	7.65	\$54,279	1.1	\$2,558,147	2%
Other Management Consulting Services	20	27	35%	30	11%	1.50	\$66,717	1.1	\$2,543,733	2%
Media Representatives	6	22	267%	30	39%	5.44	\$31,720	1.1	\$2,203,882	1%
Commercial Photography	8	15	88%	18	19%	6.11	\$29,442	1.1	\$2,122,277	1%
Offices of Certified Public Accountants	20	21	5%	23	10%	0.28	\$62,065	1.1	\$2,018,730	1%
Title Abstract and Settlement Offices	9	13	44%	13	5%	1.11	\$88,260	1.2	\$1,882,518	1%
Marketing Consulting Services	18	15	(17%)	16	7%	0.32	\$65,435	1.1	\$1,759,689	1%
Landscape Architectural Services	7	24	243%	32	35%	3.11	\$50,701	1.1	\$1,711,311	1%
Interior Design Services	14	20	43%	22	13%	1.27	\$37,355	1.1	\$1,482,012	1%
Advertising Agencies	6	10	0%	10	0%	0.18	\$55,508	1.1	\$1,143,038	1%
Environmental Consulting Services	9	10	0%	10	0%	0.57	\$65,780	1.1	\$904,271	1%
Other Specialized Design Services	9	15	67%	17	13%	3.72	\$26,121	1.1	\$813,526	0%
Other Computer Related Services	4	10	25%	10	0%	0.25	\$87,011	1.2	\$806,462	0%
Computer Facilities Management Services	5	8	(20%)	8	0%	0.33	\$63,380	1.1	\$530,584	0%
Geophysical Surveying and Mapping Services	5	4	(40%)	4	0%	1.19	\$146,564	1.4	\$445,972	0%
Professional, Scientific, and Technical Services Totals	1,132	1,532	35%	1,830	19%	1.82	\$72,810	1.1	\$167,571,586	100%

Source: Emsi Developer 2018.2 dataset.



next five years. Going forward, building this cluster and adding even faster growth should be an important economic development target.

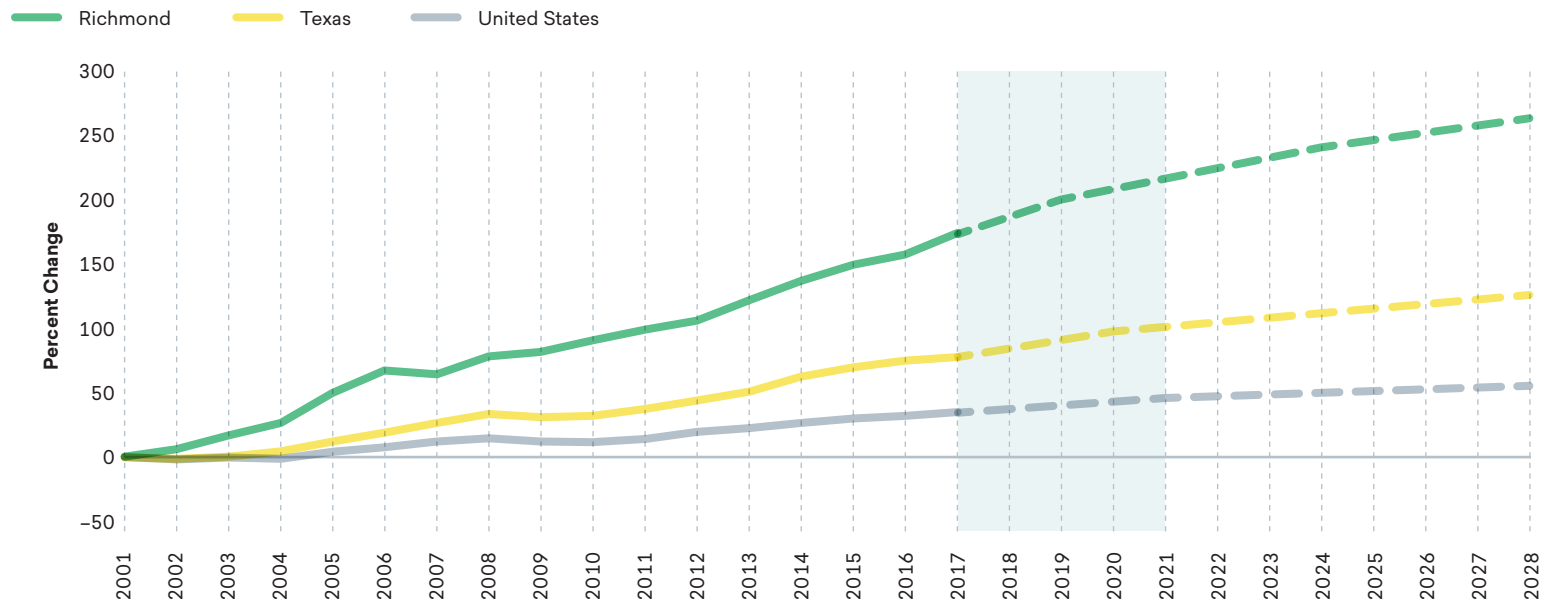
Total sales for all companies in this cluster were \$275 million (5% of total regional sales) and the cluster contributed nearly \$200 million to the region's gross regional product (7% of total GRP) in 2017.

Among cluster industries, lawyers, veterinarians, and accounting services are the largest employing sectors in this cluster and all have seen significant employment gains, adding jobs in the years following the recession. Between 2012 and 2017, almost all sectors

in this cluster experienced growth. Tied closely to construction and closely tied to new land development, surveying declined sharply – perhaps indicating a drop-off from an earlier period of significant activity in new home construction. Overall, the number of Richmond jobs in this cluster increased by 35% from 2012 to 2017.

Historically, Richmond businesses in these professional, scientific, and technical services sectors have experienced strong growth. In fact, growth in professional, scientific, and technical services activities in Richmond has been much stronger than for either Texas or the U.S. Figure 2.4 shows that the year-over-year (YOY) growth rate

FIGURE 2.4F. PROFESSIONAL, SCIENTIFIC, AND TECHNICAL SERVICES EMPLOYMENT TRENDS; YOY EMPLOYMENT GROWTH



Source: Emsi Developer 2018.2 dataset



for the industry sector in Richmond. Projections show employment growth in this cluster will remain strong and will grow more in Richmond than for the nation or Texas.

Labor Market Gap Analysis

Table 2.4, on the next page, lists the top 15 occupations in professional, scientific, and technical services. These occupations account for 53% of all cluster employment. The table provides the number of people employed by occupation in the cluster, and the number of people employed in that occupation in all industries in the region. This indicates the level of competition employers may face from industries outside the cluster when hiring for key occupations. Overall, for these 15 occupations, the cluster employs 26% of the people in these occupations in the region. The other 74% are employed by industry sectors outside of the professional, scientific, and technical services sector.

The occupations within the professional, scientific, and technical services cluster are either highly trained professionals or support positions. Support positions tend to earn around \$15 / hour, and as shown in Table 2.5 on the next page, require at least a high school education. Professional positions all tend to pay more than \$30 / hour and require a college education or beyond.

Support occupations in this cluster are valuable because of the on the job training that is offered. With experience, the skills required for these occupations are highly transferrable across many industries. Richmond has a surplus of these people, as demonstrated by the net commuting data in Table 2.4 above. Negative commuting numbers in red in the net commuters column indicates that people live in Richmond and travel elsewhere for work.

Table 2.5 shows the average annual openings (averaged over the past five years) for specific occupations within Richmond. Openings are further divided into two categories – openings for replacement jobs (jobs that are open due to retirement or other attrition) and openings for newly created jobs. As with other clusters, clerical positions have both the greatest attrition and the largest number of new jobs.

Supply Chain Analysis

Table 2.6 provides a picture about the total demand in Richmond by all Richmond residents and businesses for products made by companies in the professional, scientific, and technical services cluster—worth a total of nearly \$355 million in the region. Table 2.6 is sorted by the dollar value of demand being met in-region by Richmond businesses. In Table 2.6, we see that the companies in these sectors do not quite reach 25% of Richmond demand for their products, while Richmond imports the other 75% of its needs for these products. This would seem to indicate potential markets for local suppliers. Tax preparation services, for example, supplies 58% of local demand, supplying about \$1 million of total local demand of \$1.8 million, while \$0.8 million is purchased by Richmond residents and businesses from outside the region. Other industry sectors that could tap into the Richmond market include the following:

- Computer System Design Services
- Management Consulting Services
- Environmental consulting Services
- Interior Design Services
- Media Representatives
- Landscape Architectural Services
- Title Abstract and Settlement Services



TABLE 2.4F. LARGEST OCCUPATIONS SPECIFIC TO PROFESSIONAL, SCIENTIFIC, AND TECHNICAL SERVICES

PROFESSIONAL, SCIENTIFIC, AND TECHNICAL SERVICES OCCUPATIONS	EMPLOYED IN INDUSTRY GROUP (2012)	EMPLOYED IN INDUSTRY GROUP (2017)	% CHANGE (2012 - 2017)	EMPLOYED IN INDUSTRY GROUP (2022)	% CHANGE (2017 - 2022)	% OF TOTAL JOBS IN INDUSTRY GROUP (2017)	*ALL JOBS FOR OCCUPATION IN THE REGION (2017)	2017 RESIDENT WORKERS	2017 NET COMMUTERS
Accountants and Auditors	112	150	34%	189	26%	10.7%	273	874	(601)
Lawyers	123	137	11%	147	8%	9.7%	162	375	(213)
Management Analysts	63	85	34%	101	19%	6.0%	113	282	(169)
Bookkeeping, Accounting, and Auditing Clerks	38	47	25%	55	16%	3.4%	230	661	(431)
Office Clerks, General	34	46	36%	54	17%	3.3%	594	1,807	(1,213)
Veterinary Technologists and Technicians	27	39	42%	47	21%	2.8%	39	50	(11)
Tax Preparers	24	29	22%	35	19%	2.1%	29	66	(37)
Software Developers, Applications	21	28	30%	34	21%	2.0%	46	295	(249)
Computer Systems Analysts	22	27	22%	33	21%	1.9%	61	349	(288)
Secretaries and Administrative Assistants	21	27	31%	33	21%	1.9%	312	983	(671)
Sales Representatives, Services, All Other	20	27	34%	32	20%	1.9%	200	592	(392)
Receptionists and Information Clerks	21	26	28%	30	12%	1.9%	156	342	(186)
Paralegals and Legal Assistants	21	26	25%	30	17%	1.8%	31	134	(103)
Customer Service Representatives	18	25	39%	30	21%	1.8%	273	1,098	(825)
General and Operations Managers	18	24	35%	30	22%	1.7%	325	943	(618)
Top 15 Professional, Scientific, and Technical Services Occupation Totals	583	742	27%	878	18%	52.9%	2,845	8,852	(6,007)

* Employed in Region column is employment for all industries, not just for Professional, Scientific, and Technical Services

Source: Emsi Developer 2018.2 dataset



TABLE 2.5F. PROFESSIONAL, SCIENTIFIC, AND TECHNICAL SERVICES OCCUPATIONAL OPENINGS

PROFESSIONAL, SCIENTIFIC, AND TECHNICAL SERVICES OCCUPATIONS	MEDIAN HOURLY EARNINGS	TYPICAL ENTRY LEVEL EDUCATION	TYPICAL ON-THE-JOB TRAINING	ANNUAL OPENINGS	ANNUAL REPLACEMENT JOBS	ANNUAL NEW JOBS
Accountants and Auditors	\$31.01	Bachelor's degree	None	34	24	10
Lawyers	\$43.39	Doctoral or professional degree	None	10	7	3
Management Analysts	\$35.83	Bachelor's degree	None	14	9	4
Bookkeeping, Accounting, and Auditing Clerks	\$18.03	Some college, no degree	Moderate-term on-the-job training	32	26	6
Office Clerks, General	\$15.16	High school diploma or equivalent	Short-term on-the-job training	88	69	19
Veterinary Technologists and Technicians	\$14.53	Associate's degree	None	5	3	2
Tax Preparers	\$19.44	High school diploma or equivalent	Moderate-term on-the-job training	4	3	1
Software Developers, Applications	\$43.36	Bachelor's degree	None	5	3	2
Computer Systems Analysts	\$39.17	Bachelor's degree	None	6	4	2
Secretaries and Administrative Assistants	\$15.79	High school diploma or equivalent	Short-term on-the-job training	44	33	10
Sales Representatives, Services, All Other	\$23.63	High school diploma or equivalent	Moderate-term on-the-job training	32	23	9
Receptionists and Information Clerks	\$11.93	High school diploma or equivalent	Short-term on-the-job training	27	20	8
Paralegals and Legal Assistants	\$26.87	Associate's degree	None	4	3	1
Customer Service Representatives	\$14.10	High school diploma or equivalent	Short-term on-the-job training	46	34	12
General and Operations Managers	\$55.87	Bachelor's degree	None	38	26	12
Top 15 Professional, Scientific, and Technical Services Occupation Totals	\$30.10			388	287	102

Source: Emsi Developer 2018.2 dataset



TABLE 2.6F. PROFESSIONAL, SCIENTIFIC, AND TECHNICAL SERVICES REGIONAL DEMAND MET BY RICHMOND COMPANIES

PROFESSIONAL, SCIENTIFIC, AND TECHNICAL SERVICES CLUSTER	2017 DEMAND MET IN-REGION	2017 % DEMAND MET IN-REGION	2017 DEMAND MET BY IMPORTS	2017 % DEMAND MET BY IMPORTS	2017 TOTAL DEMAND
Offices of Lawyers	24,172,809	27%	63,854,993	73%	\$88,027,802
Veterinary Services	14,822,628	79%	3,875,062	21%	\$18,697,690
Computer Systems Design Services	10,763,907	39%	17,076,848	61%	\$27,840,755
Engineering Services	4,499,731	11%	37,342,422	89%	\$41,842,153
Management Consulting Services	4,428,864	33%	8,901,435	67%	\$13,330,299
Payroll Services	4,343,856	100%	3,514	0%	\$4,347,370
Custom Computer Programming Services	3,727,176	13%	24,889,126	87%	\$28,616,302
All Other Professional, Scientific, and Technical Services	3,164,386	47%	3,536,117	53%	\$6,700,503
Other Accounting Services	2,369,737	35%	4,492,343	65%	\$6,862,080
Other Scientific and Technical Consulting Services	2,157,103	49%	2,201,998	51%	\$4,359,101
Commercial Photography	1,662,455	100%	1,070	0%	\$1,663,525
Offices of Certified Public Accountants	1,384,804	10%	12,237,366	90%	\$13,622,170
Process, Physical Distribution, and Logistics Consulting Services	1,353,122	78%	376,345	22%	\$1,729,467
Tax Preparation Services	1,089,016	58%	773,571	42%	\$1,862,587
Title Abstract and Settlement Offices	874,642	28%	2,277,347	72%	\$3,151,989
Marketing Consulting Services	811,995	18%	3,765,271	82%	\$4,577,266
Building Inspection Services	811,260	94%	51,352	6%	\$862,612
Environmental Consulting Services	578,014	37%	998,942	63%	\$1,576,956
Interior Design Services	520,037	30%	1,234,281	70%	\$1,754,318
Media Representatives	437,852	41%	620,639	59%	\$1,058,491
Landscape Architectural Services	416,530	26%	1,178,039	74%	\$1,594,569
Other Management Consulting Services	346,710	19%	1,499,746	81%	\$1,846,456
Corporate, Subsidiary, and Regional Managing Offices	287,905	0%	61,999,986	100%	\$62,287,891
Other Specialized Design Services	177,023	32%	371,920	68%	\$548,943
Advertising Agencies	157,761	2%	8,593,386	98%	\$8,751,147
Other Computer Related Services	129,792	3%	4,165,751	97%	\$4,295,543
Computer Facilities Management Services	97,901	4%	2,164,674	96%	\$2,262,575
Geophysical Surveying and Mapping Services	10,267	2%	585,814	98%	\$596,081
Professional, Scientific, and Technical Services Totals	85,597,284	24%	269,069,358	76%	\$354,666,643

Source: Emsi Developer 2018.2 dataset



Table 2.7, on the next page, shows the economic development opportunity to build up the region's supply chain supporting professional, scientific, and technical services companies. This table shows the goods and services that companies within the professional, scientific, and technical services cluster buy to use in offering their products or services. Less than 23% of professional, scientific, and technical services supply needs are met within the region, while 77% are purchased from outside. In total, the value of the professional, scientific, and technical services supply chain for Richmond manufacturers is nearly \$73 million. Almost every type of product or service is largely supplied to Richmond's professional, scientific, and technical services industry from outside of Richmond. This would seem to indicate that there are significant opportunities to provide more of the supply chain for Richmond professional, scientific, and technical services companies. Attracting and developing more professional and technical services, more business services, more retail trade, and more arts, entertainment, and recreation all appear to be those industries that offer the greatest potential for growth in Richmond.

Table 2.8 shows greater detail for major products or services purchased by Richmond professional, scientific, and technical services companies. These are industry sectors which are key suppliers to the

professional, scientific, and technical services industry, and account for more than 46% of the sector's total supply chain requirements. More importantly, these are industry sectors that are already established in the Richmond economy or have strong growth or attraction potential because of synergies with other closely related industry sectors or because they require occupations already present in the Richmond labor market.

Table 2.9 shows the amount of goods and services sold by Richmond professional, scientific, and technical services companies both inside and outside the region. These companies sell more than \$275 million of products or services, of which nearly \$190 million is sold outside Richmond, thus bringing substantial revenues into Richmond.

In summary, the professional, scientific, and technical services industry may be the single industry cluster that offers the most potential for economic development efforts. Professionals in this cluster expect a good housing market, good schools, local amenities, and a high quality of life. Further, this cluster supports all of the other targeted clusters with essential services and expertise. Growth in this sector, as well as attracting professionals to live in Richmond, can strengthen the overall economy of Richmond, from Main Street businesses to key employers in a variety of industries.

TABLE 2.7F. PROFESSIONAL, SCIENTIFIC, AND TECHNICAL SERVICES SUPPLY CHAIN

PURCHASES FROM	IN-REGION PURCHASES	% IN-REGION PURCHASES	IMPORTED PURCHASES	% IMPORTED PURCHASES	TOTAL PURCHASES
Professional, Scientific, and Technical Services	\$4,867,458	29.8%	\$11,466,349	70.2%	\$16,333,807
Real Estate and Rental and Leasing	\$5,163,734	48.7%	\$5,447,315	51.3%	\$10,611,049
Business Services	\$2,406,202	27.5%	\$6,332,234	72.5%	\$8,738,436
Finance and Insurance	\$359,737	5.3%	\$6,472,135	94.7%	\$6,831,872
Information	\$786,743	12.0%	\$5,791,668	88.0%	\$6,578,411
Manufacturing	\$73,128	1.2%	\$6,284,557	98.8%	\$6,357,685
Accommodation and Food Services	\$1,233,424	30.6%	\$2,797,570	69.4%	\$4,030,994
Transportation and Warehousing	\$413,520	10.8%	\$3,420,984	89.2%	\$3,834,504
Management of Companies and Enterprises	\$18,115	0.5%	\$3,531,030	99.5%	\$3,549,145
Wholesale Trade	\$115,838	5.4%	\$2,016,420	94.6%	\$2,132,258
Other Services (except Public Administration)	\$646,125	48.9%	\$674,632	51.1%	\$1,320,756
Arts, Entertainment, and Recreation	\$160,158	23.5%	\$520,226	76.5%	\$680,385
Retail Trade	\$114,318	17.7%	\$532,174	82.3%	\$646,493
Government	\$146,267	36.4%	\$255,571	63.6%	\$401,838
Utilities	\$14,142	5.8%	\$227,860	94.2%	\$242,002
Health Care and Social Assistance	\$23,933	11.9%	\$177,016	88.1%	\$200,948
Educational Services	\$3,132	1.6%	\$194,917	98.4%	\$198,049
Construction	\$45,039	57.8%	\$32,838	42.2%	\$77,878
Mining, Quarrying, and Oil and Gas Extraction	\$13,546	19.6%	\$55,413	80.4%	\$68,959
Agriculture, Forestry, Fishing and Hunting	\$0	0.0%	\$11,351	100.0%	\$11,351
Total Professional, Scientific, and Technical Services Supply Chain Requirements	\$16,604,558	22.8%	\$56,242,262	77.2%	\$72,846,820

Source: Emsi Developer 2018.2 dataset



TABLE 2.8F. PROFESSIONAL, SCIENTIFIC, AND TECHNICAL SERVICES SUPPLY CHAIN DETAIL FOR KEY PRODUCTS OR SERVICES

PURCHASES FROM	IN-REGION PURCHASES	% IN-REGION PURCHASES	IMPORTED PURCHASES	% IMPORTED PURCHASES	TOTAL PURCHASES
Professional, Scientific, and Technical Services	\$4,867,458	29.8%	\$11,466,349	70.2%	\$16,333,807
Real Estate	\$5,124,932	59.0%	\$3,559,800	41.0%	\$8,684,731
Administrative and Support Services	\$2,333,338	27.3%	\$6,198,857	72.7%	\$8,532,196
Credit Intermediation and Related Activities	\$271,199	7.5%	\$3,342,554	92.5%	\$3,613,753
Management of Companies and Enterprises	\$18,115	0.5%	\$3,531,030	99.5%	\$3,549,145
Food Services and Drinking Places	\$1,193,810	41.7%	\$1,668,788	58.3%	\$2,862,597
Telecommunications	\$419,366	17.6%	\$1,969,255	82.4%	\$2,388,621
Insurance Carriers and Related Activities	\$30,040	1.4%	\$2,116,936	98.6%	\$2,146,976
Chemical Manufacturing	\$6,244	0.4%	\$1,568,065	99.6%	\$1,574,309
Other Information Services	\$0	0.0%	\$1,482,632	100.0%	\$1,482,632
Lessors of Nonfinancial Intangible Assets (except Copyright Works)	\$0	0.0%	\$1,482,613	100.0%	\$1,482,613
Air Transportation	\$0	0.0%	\$1,177,833	100.0%	\$1,177,833
Accommodation	\$39,614	3.4%	\$1,128,783	96.6%	\$1,168,397
Publishing Industries (except Internet)	\$42,370	3.8%	\$1,085,898	96.2%	\$1,128,268
Merchant Wholesalers, Durable Goods	\$23,365	2.2%	\$1,025,616	97.8%	\$1,048,981
Financial Services, Misc.	\$58,492	5.7%	\$964,907	94.3%	\$1,023,399
Broadcasting (except Internet)	\$219,923	22.6%	\$752,495	77.4%	\$972,417
Couriers and Messengers	\$96,888	13.0%	\$648,367	87.0%	\$745,255
Computer and Electronic Product Manufacturing	\$233	0.0%	\$692,552	100.0%	\$692,784
Merchant Wholesalers, Nondurable Goods	\$56,073	8.5%	\$603,614	91.5%	\$659,687

Source: Emsi Developer 2018.2 dataset



TABLE 2.9F. RICHMOND PROFESSIONAL, SCIENTIFIC, AND TECHNICAL SERVICES COMPANIES SALES IN REGION AND EXPORTED OUT OF REGION

PROFESSIONAL, SCIENTIFIC, AND TECHNICAL SERVICES CLUSTER	2017 SALES SOLD IN-REGION	2017 % SALES SOLD IN-REGION	2017 SALES SOLD AS EXPORTS	2017 % SALES SOLD AS EXPORTS	2017 TOTAL SALES
Offices of Lawyers	\$24,172,809	54%	\$20,926,150	46%	\$45,098,959
All Other Professional, Scientific, and Technical Services	\$3,164,386	10%	\$28,605,919	90%	\$31,770,305
Management Consulting Services	\$4,428,864	17%	\$20,928,392	83%	\$25,357,256
Engineering Services	\$4,499,731	19%	\$18,957,710	81%	\$23,457,441
Computer Systems Design Services	\$10,763,907	65%	\$5,706,275	35%	\$16,470,182
Veterinary Services	\$14,822,628	90%	\$1,577,381	10%	\$16,400,009
Other Accounting Services	\$2,369,737	15%	\$13,857,575	85%	\$16,227,312
Other Scientific and Technical Consulting Services	\$2,157,102	14%	\$13,253,279	86%	\$15,410,381
Process, Physical Distribution, and Logistics Consulting Services	\$1,353,122	13%	\$9,079,816	87%	\$10,432,938
Custom Computer Programming Services	\$3,727,176	38%	\$5,954,214	62%	\$9,681,390
Tax Preparation Services	\$1,089,016	12%	\$8,171,248	88%	\$9,260,264
Payroll Services	\$4,343,856	57%	\$3,263,044	43%	\$7,606,900
Corporate, Subsidiary, and Regional Managing Offices	\$287,906	4%	\$6,721,818	96%	\$7,009,724
Building Inspection Services	\$811,260	16%	\$4,345,216	84%	\$5,156,476
Other Management Consulting Services	\$346,710	7%	\$4,332,327	93%	\$4,679,037
Media Representatives	\$437,852	11%	\$3,552,478	89%	\$3,990,330
Commercial Photography	\$1,662,455	42%	\$2,304,857	58%	\$3,967,312
Landscape Architectural Services	\$416,531	12%	\$3,071,857	88%	\$3,488,388
Marketing Consulting Services	\$811,995	25%	\$2,416,563	75%	\$3,228,558
Offices of Certified Public Accountants	\$1,384,804	49%	\$1,453,747	51%	\$2,838,551
Title Abstract and Settlement Offices	\$874,641	33%	\$1,780,814	67%	\$2,655,455
Interior Design Services	\$520,038	24%	\$1,659,358	76%	\$2,179,396
Advertising Agencies	\$157,761	8%	\$1,931,662	92%	\$2,089,423
Environmental Consulting Services	\$578,014	36%	\$1,036,393	64%	\$1,614,407
Other Specialized Design Services	\$177,023	11%	\$1,372,868	89%	\$1,549,891
Other Computer Related Services	\$129,792	9%	\$1,321,744	91%	\$1,451,536
Computer Facilities Management Services	\$97,901	9%	\$955,902	91%	\$1,053,803
Geophysical Surveying and Mapping Services	\$10,267	1%	\$885,651	99%	\$895,918
Professional, Scientific, and Technical Services Totals	\$85,597,284	31%	\$189,424,257	69%	\$275,021,542

Source: Emsi Developer 2018.2 dataset

