

January 4, 2012

Dear Colleague,

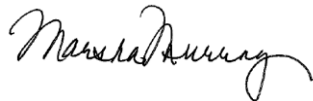
On behalf of Murray Resources, I am pleased to present the results of our inaugural Houston Growth and Staffing Outlook survey. The purpose of conducting this study was to gain a preliminary understanding of the general economic climate and staffing outlook facing Houston companies in 2012.

Please note that the survey findings should not be interpreted as scientific or statistically representative of the entire Houston business community, but rather should be viewed as one anecdotal data point.

The survey was distributed to Murray Resources' clients, business contacts, and through the company's social media channels. 60 Houston company leaders and executives, HR staff, and hiring managers completed the survey.

For additional recruiting and staffing resources, please visit **[murrayresources.com/employers](http://murrayresources.com/employers)**.

Wishing you a prosperous 2012 and beyond,

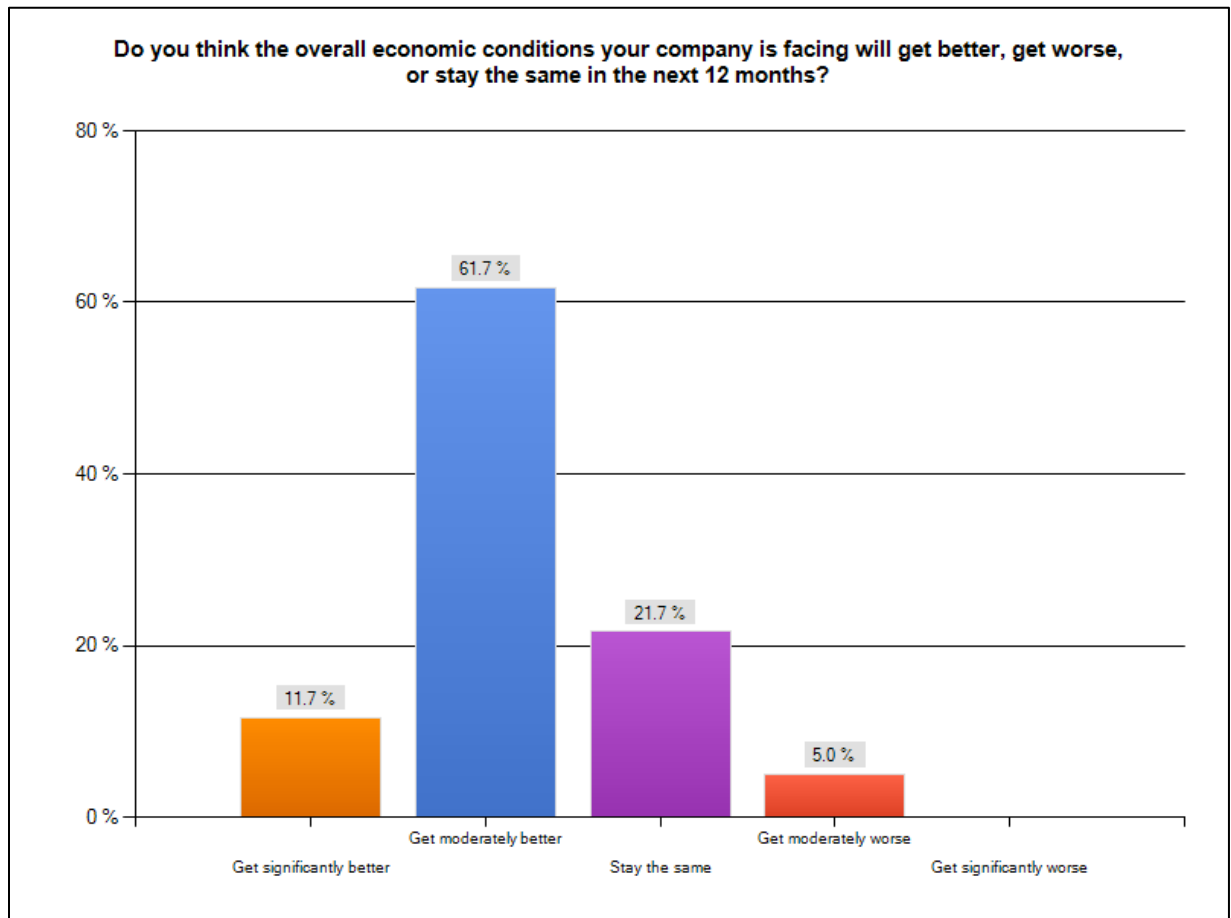


Marsha Murray  
President and Founder  
Murray Resources, LTD

## Research Findings

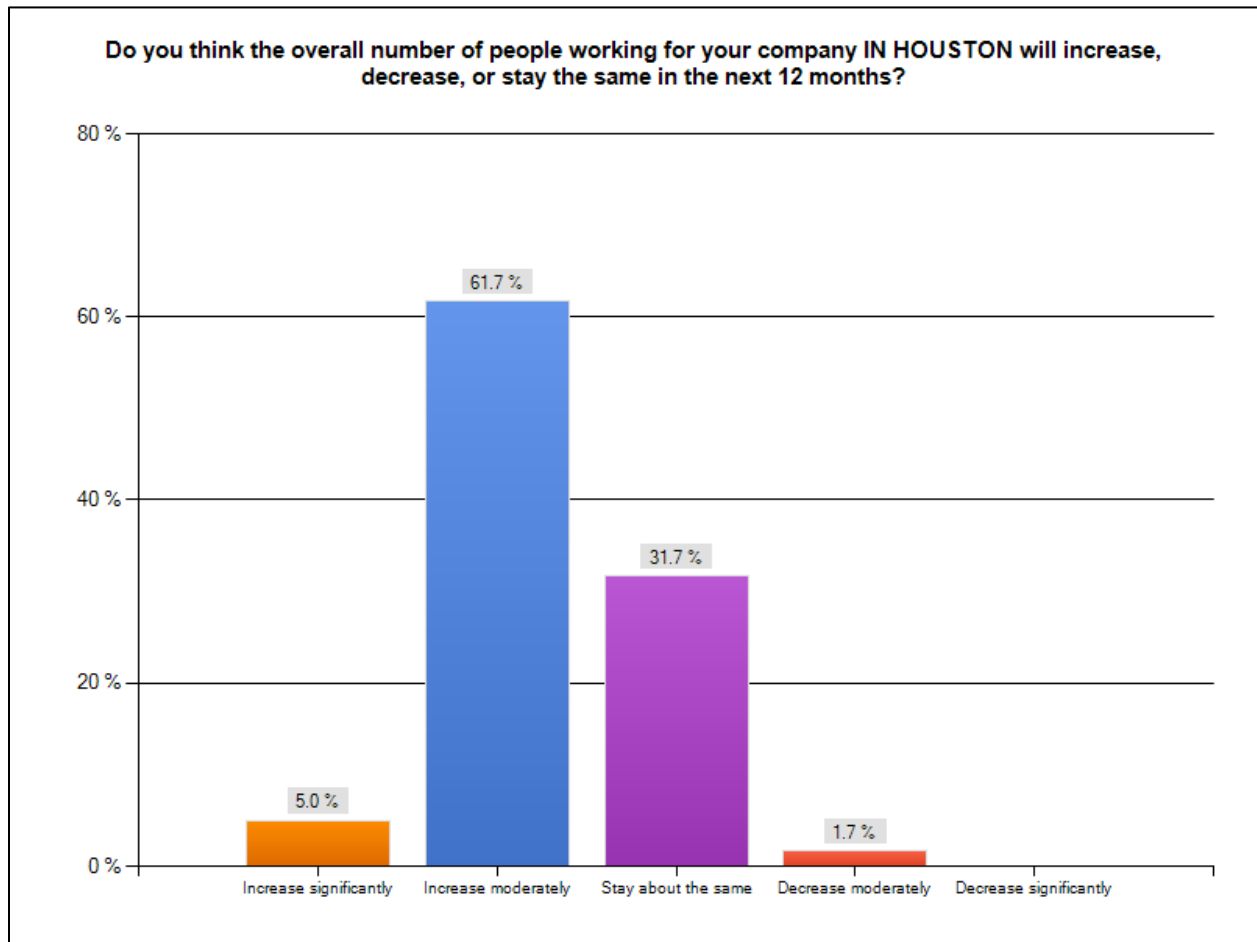
### OVERALL ECONOMIC OUTLOOK

- ***Company leaders and hiring managers appear to be approaching 2012 with cautious optimism.*** 62% of respondents expect the economic conditions facing their companies to get “moderately better”. 12% report that they expect the economic conditions to get “significantly better”. Encouragingly, only 5% expect moderately worse conditions, while no respondents expect significantly worse conditions. 22% expected economic conditions to remain about the same.



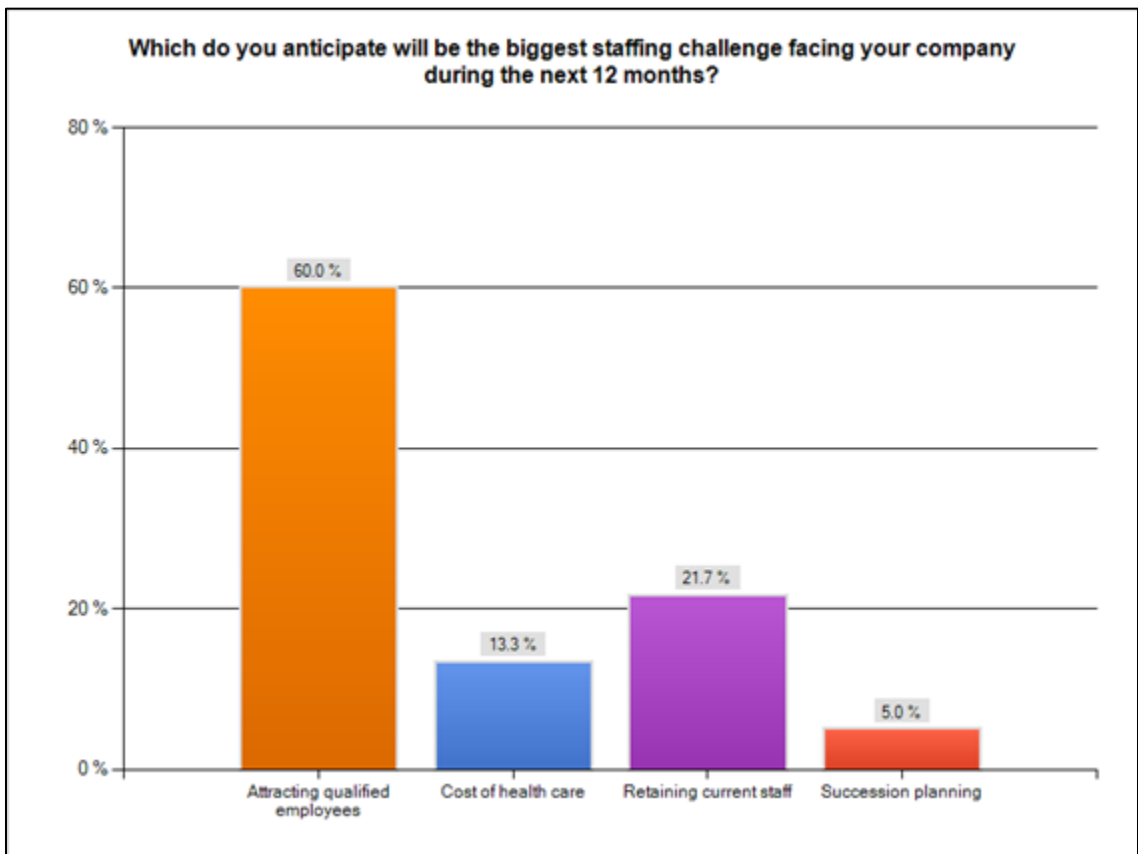
## EXPECTATIONS FOR HIRING

- ***The majority of respondents expect a moderate increase in hiring over the next 12 months.*** 62% expect a moderate increase in hiring over the next year, while only 5% expect a significant increase. 32% expect hiring to remain about the same. Only one respondent expects a moderate decrease and none of the respondents expect a significant decrease.



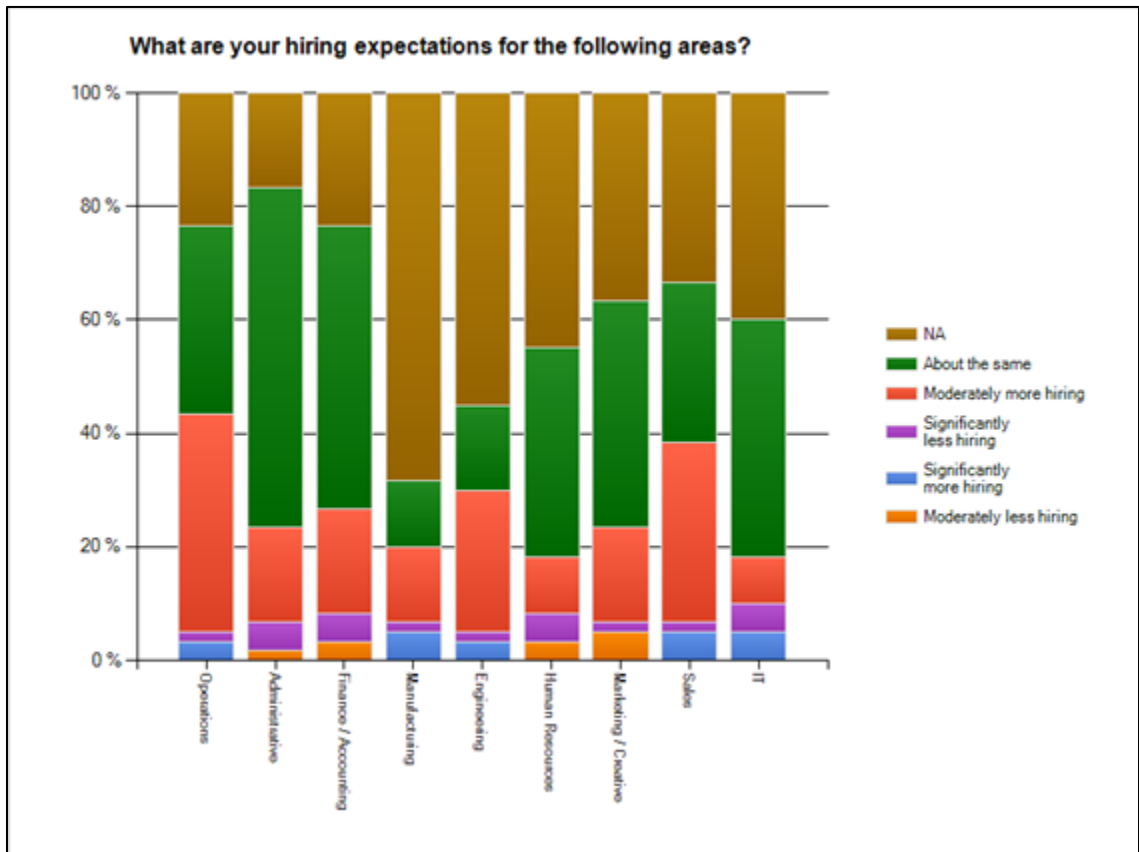
## MOST SIGNIFICANT HUMAN RESOURCE CHALLENGE

- **Despite unemployment numbers that remain historically high, attracting qualified talent continues to be a significant human resource challenge for Houston companies.** 60% of respondents anticipate their company's ability to attract qualified employees to be their biggest staffing challenge in the coming 12 months. Retaining current staff (22%) and the cost of health care (13%) were significant, but distant second and third concerns. Succession planning was a concern for just 5% of respondents.



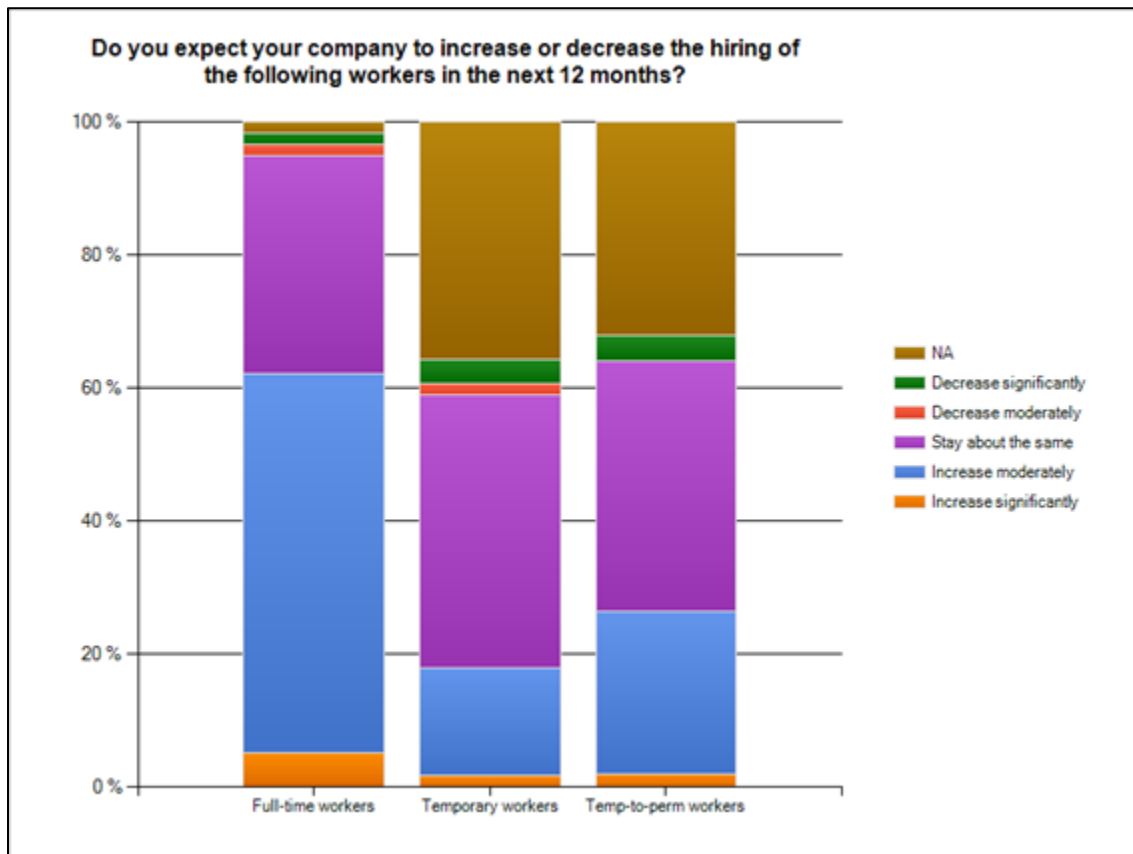
## HIRING EXPECTATIONS FOR SPECIFIC FUNCTIONS

- Respondents expect Operations to undertake the greatest hiring growth in the next 12 months.*** 38% of respondents expect moderately more hiring in the Operations area of their company. Companies are also expecting the Sales (32%) and Engineering (25%) functions to undergo moderate hiring growth. No single function received more than 5% (Manufacturing, Sales, IT) of respondents answering that they expected a significant increase in hiring.



## HIRING EXPECTATIONS FOR TEMP vs. TEMP-TO-PERM vs. FULL-TIME

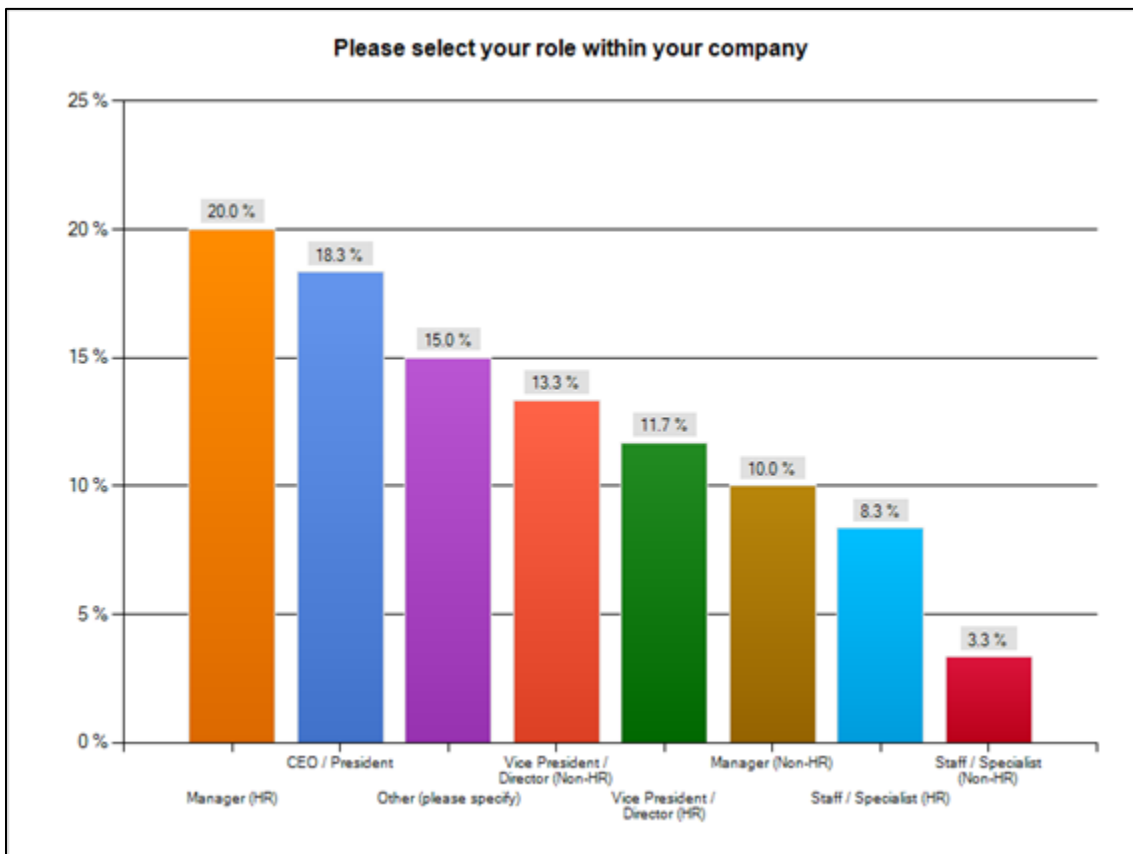
- Over half of employers anticipate an increase in hiring full-time employees during 2012.** 58% of respondents expect a moderate increase in full-time employees in the coming year. Conversely, just 25% expect a moderate increase in temp-to-perm workers and 16% expect a moderate increase in temporary workers. While very few respondents expect a significant increase in hiring of any of three worker classifications (3.5%, 2%, 2%, respectively), neither do they expect a significant decrease in hiring (1%, 4%, 4%, respectively).



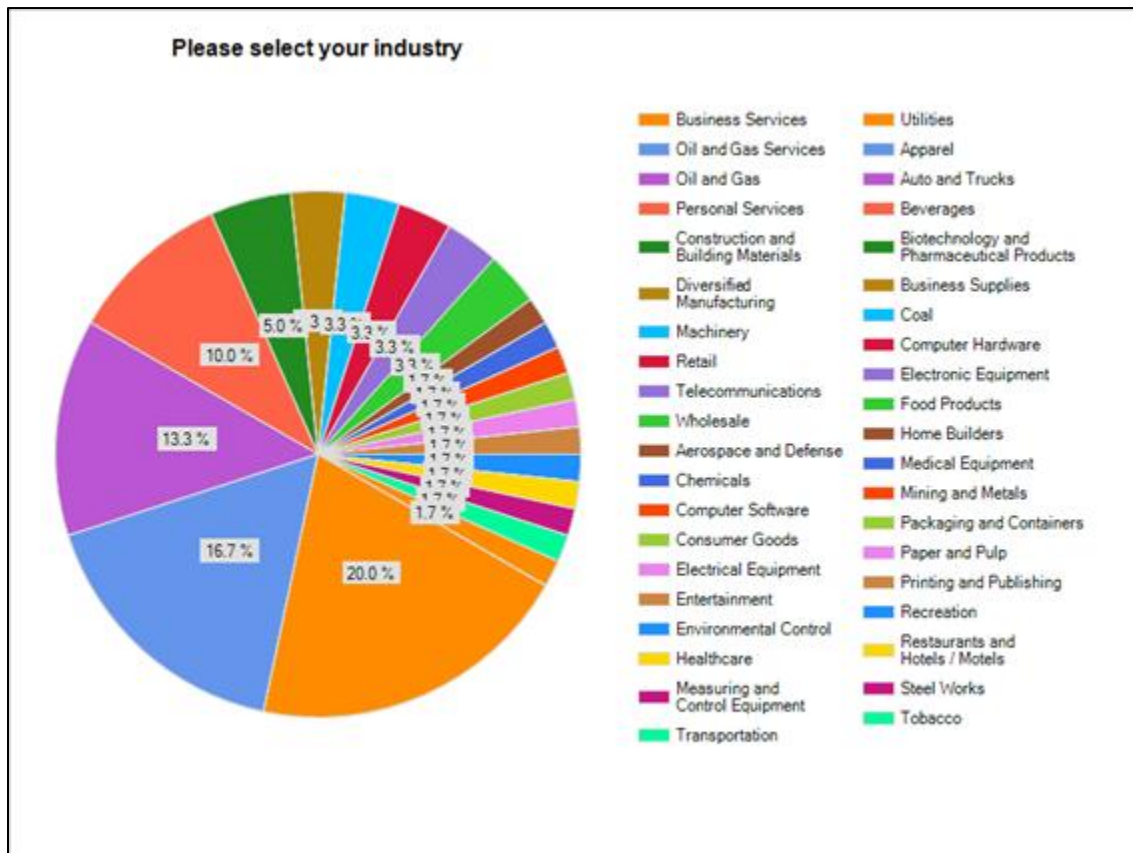
## ABOUT THE SURVEY RESPONDENTS

- **Approximately half (49%) of the survey respondents are in Director level positions or above at their companies.**
  - 22% of respondents are CEO / President / Principal / Partner of their companies
  - 20% are Manager level in an HR role
  - 15% are Vice President / Director level in a *non*-HR role
  - 12% are Vice President / Director level in an HR role
  - 10% are Manager level in a *non*-HR role
  - 8% are Staff / Specialists in an HR role
  - 8% are Staff / Specialists in a *non*-HR role

Note: The chart below does not match the figures above, as the 15% “other” responses below have been distributed above according to the “write-in” answers given by respondents.



- While Oil & Gas companies and related industries are well-represented, as expected in the Houston market, the study’s respondents are drawn from a highly diverse range of industries.** 21 different industries were selected by respondents, with an additional 15 respondents writing in their industry. Only four industries represent 10% or more of the companies in the survey – Business Services (20%), Oil and Gas Services (17%), Oil and Gas (13%), and Personal Services (10%).



- **The survey respondents represent a wide range of company sizes, with small companies (<100 employees) representing approximately half of all respondents.** Respondents representing companies with fewer than 100 employees account for 53.3% of respondents, with the next largest segment being 100-499 employees (18.3%). Large companies (>1000 employees) represent approximately 18% of the respondents.

