

THE ECONOMY AT A GLANCE

HOUSTON



GREATER HOUSTON
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Making Houston Greater.

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City alone lost over a quarter-million people during those four years, with residents moving out in search of more space and a lower cost of living.

TOP 20 MOST POPULOUS U.S. CITIES RANKED BY RESIDENTS ADDED/LOST SINCE '20

Rank	City	Population		Residents Added/Lost
		'20	'24	
1	Houston	2,298,945	2,390,125	91,180
2	San Antonio	1,439,340	1,526,656	87,316
3	Fort Worth	923,645	1,008,106	84,461
4	Charlotte	874,948	943,476	68,528
5	Phoenix	1,612,593	1,673,164	60,571
6	Jacksonville	951,925	1,009,833	57,908
7	Seattle	740,600	780,995	40,395
8	Oklahoma City	683,084	712,919	29,835
9	Austin	965,893	993,588	27,695
10	Columbus	906,466	933,263	26,797
11	Dallas	1,303,426	1,326,087	22,661
12	San Diego	1,384,824	1,404,452	19,628
13	Denver	717,620	729,019	11,399
14	Indianapolis	887,213	891,484	4,271
15	San Jose	1,009,686	997,368	-12,318
16	Los Angeles	3,896,329	3,878,704	-17,625
17	Chicago	2,745,196	2,721,308	-23,888
18	Philadelphia	1,600,788	1,573,916	-26,872
19	San Francisco	874,826	827,526	-47,300
20	New York	8,740,306	8,478,072	-262,234

Note: Reflects population on July 1st of the given year

Source: Partnership analysis of U.S. Census Bureau data

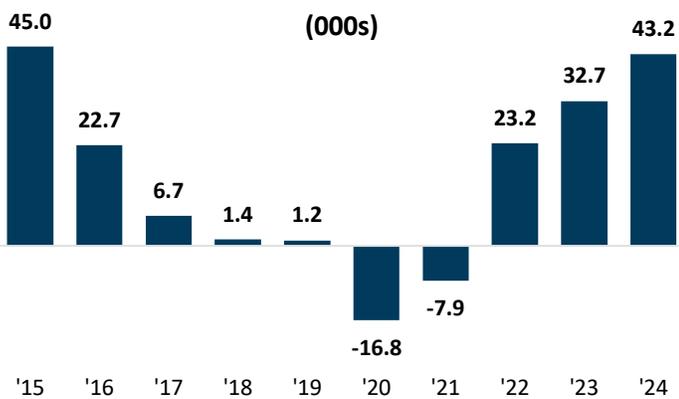
Among major cities adding the most residents, a disproportionate number are in Texas. The top three cities are all in the Lone Star State, with San Antonio and Fort Worth trailing behind Houston in the second and third spots. Austin and Dallas have also shown meaningful growth.

Houston continues to be the fourth most populous U.S. city, trailing Chicago. After several years of population decline, Chicago saw growth in '24. Still, Houston's growth rate is much faster. Based on last year's growth rates, Houston is projected to overtake Chicago as the third-largest U.S. city in '37.

CITY POPULATION GROWTH

The City of Houston is growing at a strong pace, with 43,217 new residents added last year bringing the city's population to a record 2,390,125 people. Since '22, Houston has experienced robust growth, reversing a five-year stint of weak or negative growth in the aftermath of Hurricane Harvey and the COVID-19 pandemic.

CITY OF HOUSTON POPULATION GAINS/LOSSES



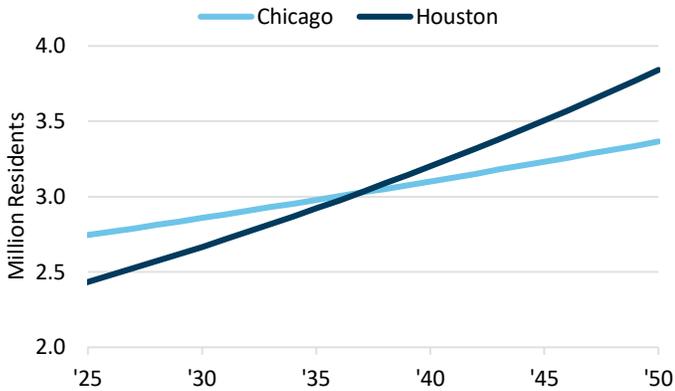
Note: Reflects population change for 12 months ending on July 1st

Source: Partnership analysis of U.S. Census Bureau data

Some professionals left the city for the suburbs during the pandemic, opting to live further from the office in larger more affordable homes. However, as offices have scaled back their work-from-home policies, demand to live closer to the city center has partially rebounded.

Houston has led the nation in municipal population growth during the '20s. In the four years since the start of the decade, the City of Houston has added 91,180 new residents – more than any other major city. All three cities with larger baseline populations (New York, Los Angeles, and Chicago) shed residents during that time. New York

CHICAGO VS HOUSTON POPULATION LINEAR GROWTH PROJECTION



Note: Projects 1-year population growth rates for '24 into the future
Source: Partnership analysis of U.S. Census Bureau data

But this projection is naïve and overly simple. There is no reason to think the current growth rates will stay constant in the future. Unforeseen events and trends can emerge, pushing the date when Houston might overtake Chicago sooner or later.

Fastest Growing Houston-Area Cities

The Census Bureau’s new population data also shows how different communities are growing within the metro area. The region’s 20 largest cities are as follows. (Note: this excludes communities like the Woodlands or Spring which are not incorporated as independent cities.)

TOP 20 MOST POPULOUS HOUSTON-AREA CITIES

City	Pop.	City	Pop.
1 Houston	2,390,125	11 Galveston	53,538
2 Pasadena	149,617	12 Rosenberg	42,571
3 Pearland	129,620	13 Friendswood	41,291
4 League City	118,456	14 La Porte	38,046
5 Conroe	114,581	15 Deer Park	34,495
6 Sugar Land	109,851	16 Alvin	29,869
7 Baytown	86,004	17 Lake Jackson	28,158
8 Missouri City	78,582	18 Katy	27,741
9 Texas City	57,875	19 Dickinson	21,941
10 Fulshear	54,629	20 Angleton	20,979

Note: Reflects population on July 1, 2024

Source: Partnership analysis of U.S. Census Bureau data

Houston proper is home to 2.4 million people, or approximately 31 percent of all metro residents. Pasadena, Pearland, League City, Conroe, and Sugar Land are each home to more than 100,000 people. Fulshear has grown significantly and overtaken Galveston as the 10th-largest city in the region.

Among these 20 cities, those with significant population growth since the start of the decade include Conroe and Katy (each growing by more than 20 percent) along with

Texas City, Rosenberg, and Alvin (each growing by 10 percent or more). A few of the region’s largest cities (Galveston, Sugar Land, and Pasadena) have lost residents during that time. But, by far the most significant growth has been in Fulshear where the population has more than tripled, growing by 210.1 percent since ‘20.

TOP 20 LARGEST HOUSTON-AREA CITIES RANKED BY POPULATION GROWTH RATE SINCE ‘20

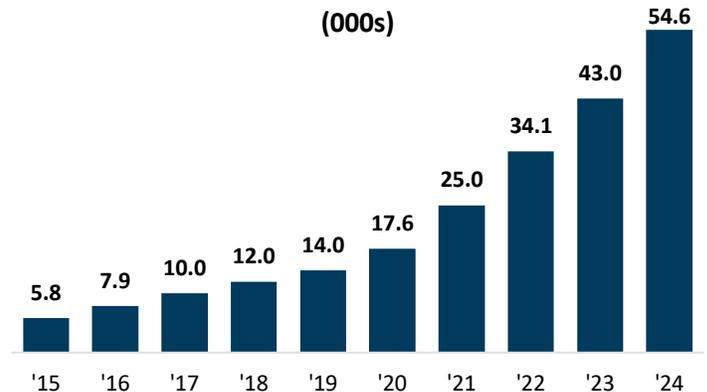
Rank	City	Population		Change (%)
		'20	'24	
1	Fulshear	17,617	54,629	210.1
2	Conroe	91,234	114,581	25.6
3	Katy	22,419	27,741	23.7
4	Texas City	52,286	57,875	10.7
5	Rosenberg	38,494	42,571	10.6
6	Alvin	27,143	29,869	10.0
7	Angleton	19,434	20,979	7.9
8	La Porte	35,304	38,046	7.8
9	Missouri City	74,440	78,582	5.6
10	Houston	2,298,945	2,390,125	4.0
11	League City	114,659	118,456	3.3
12	Pearland	126,011	129,620	2.9
13	Dickinson	21,468	21,941	2.2
14	Baytown	85,436	86,004	0.7
15	Friendswood	41,027	41,291	0.6
16	Deer Park	34,364	34,495	0.4
17	Lake Jackson	28,148	28,158	0.0
18	Galveston	53,652	53,538	-0.2
19	Sugar Land	110,844	109,851	-0.9
20	Pasadena	151,449	149,617	-1.2

Note: Reflects 48-month change for period ending on July 1, 2024

Source: Partnership analysis of U.S. Census Bureau data

In 10 years, Fulshear grew from a small community of less than six thousand to a population center almost 10 times that size. The city’s evolution is due in large part to the rapid development of residential subdivisions.

FULSHEAR POPULATION BY YEAR



Note: Reflects population as of July 1st of the given year

Source: U.S. Census Bureau

Looking across the nation, Fulshear is the fastest-growing

city with 50K+ residents since the start of the decade.

U.S. CITIES* WITH THE FASTEST POPULATION GROWTH '20-'24

City	%	City	%
1 Fulshear, TX	210.1	11 Maricopa, AZ	30.2
2 Celina, TX	190.0	12 Little Elm, TX	29.7
3 Saratoga Springs, UT	49.9	13 Casa Grande, AZ	27.3
4 Georgetown, TX	47.5	14 New Braunfels, TX	27.0
5 Leander, TX	43.8	15 Conroe, TX	25.6
6 Kyle, TX	41.8	16 Port St. Lucie, FL	25.0
7 Queen Creek, AZ	37.6	17 North Port, FL	23.0
8 Eagle Mountain, UT	35.8	18 Buckeye, AZ	22.0
9 Westfield, IN	34.0	19 Lehi, UT	21.6
10 Lebanon, TN	32.4	20 Goodyear, AZ	20.8

Note: *Limited to cities with over 50K residents in '24

Source: Partnership analysis of U.S. Census Bureau data

Of the top 20 fastest-growing cities during that time, eight are in Texas, with two in the Houston area (Fulshear and Conroe), two in the Dallas/Fort Worth area (Celina and Little Elm), one in the San Antonio area (New Braunfels), and three in the Austin area (Georgetown, Leander, and Kyle).

A DEEPER DIVE INTO METRO POPULATION

April's issue of *Glance* examined the outstanding level of population growth that the metro area experienced in '24. Data released by the Census Bureau provides additional insights into how the Houston-Pasadena-The Woodlands area has achieved this growth and how it will benefit its economy for years to come.

In '24, about a quarter of the region's population growth was due to natural increase (i.e. the number of babies born minus the number of people who died). The rate of natural population increase in Houston is much higher than in other large metros due to its high birth rates.

TOP 20 MOST POPULOUS U.S. METROS RANKED BY BIRTH RATE IN '24

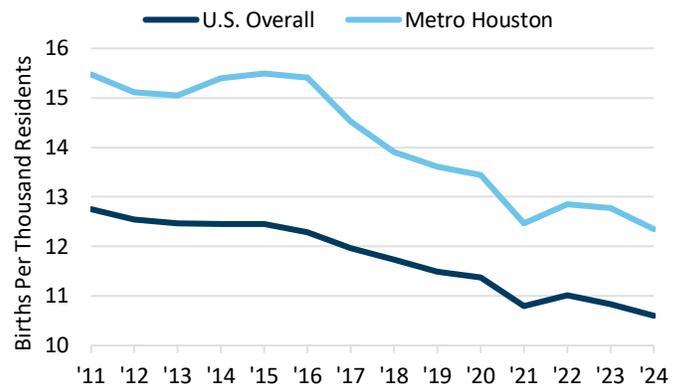
Metro	Births Per 1000 Res.	Metro	Births Per 1000 Res.
1 Houston	12.3	11 Philadelphia	10.5
2 Dallas	12.3	12 Seattle	10.4
3 Atlanta	11.2	13 Orlando	10.2
4 Riverside	11.1	14 Detroit	10.2
5 Minneapolis	11.0	15 Miami	10.1
6 San Diego	10.8	16 Chicago	10.0
7 Denver	10.8	17 Boston	9.8
8 Phoenix	10.8	18 Los Angeles	9.6
9 New York	10.7	19 San Francisco	9.3
10 Washington	10.7	20 Tampa	9.2

Source: Partnership analysis of U.S. Census Bureau data

Houston led other large metros with 12.3 babies born per thousand residents in '24. Dallas came close to matching Houston's rate, but it still lagged by a fraction of a percent. All other metros were at least one birth per thousand residents behind, with cities like San Francisco and Tampa lagging by three births.

Across the developed world, birth rates have been falling for decades as social norms change, more women enter the workforce, and the costs of raising children increase. The U.S. has maintained a higher birth rate than other advanced economies in Europe and East Asia. But the U.S. rate has also fallen, going from 12.8 babies born per thousand residents in '11 to 10.6 in '24. Houston's birth rate, while declining from 15.5 babies born per thousand residents to 12.3 over the same period, has remained consistently higher than rates for other major metros and the U.S. overall.

BIRTH RATES OVER TIME U.S. VS METRO HOUSTON



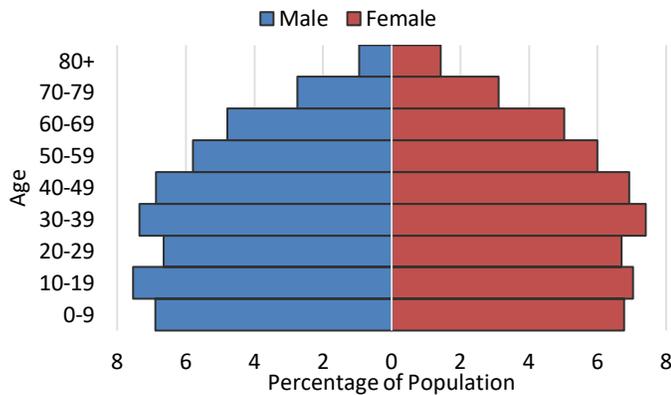
Source: Partnership analysis of U.S. Census Bureau data

Why are birth rates important to the economy? Because babies become adults and ultimately enter the workforce. Having high birth rates and a large population of minors means the labor force can continue to grow in the years and decades ahead.

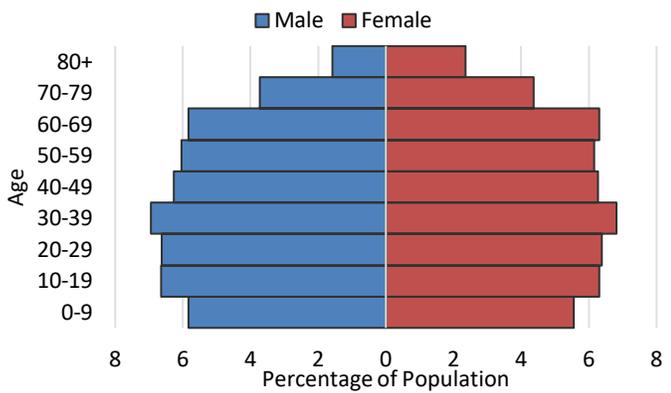
With its high birth rates, Houston has more children and young adults than most of the country. The chart below compares Houston's population pyramid to that of the U.S. overall. Each bar on the chart shows the share of people in different age groups, with males on the left in blue and females on the right in red. Having a pyramid shape is good for long-term economic growth – a wide base of children and young adults will contribute to the labor force for decades to come while supporting a smaller tip of retirees. Houston's chart is roughly pyramid-shaped, while the U.S. is closer to a sphere, with fewer children and more people that have aged out of the labor force.

POPULATION PYRAMIDS

METRO HOUSTON



U.S. OVERALL

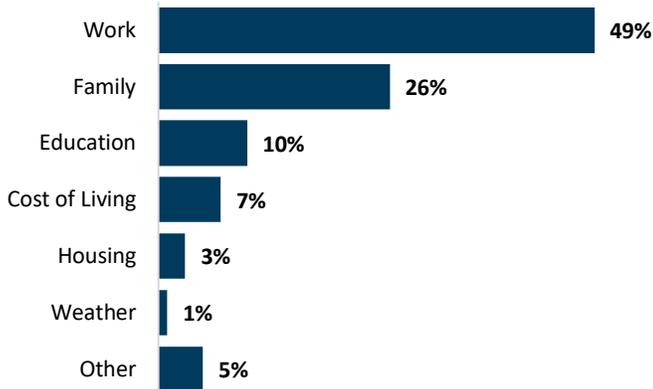


Source: U.S. Census Bureau American Community Survey '23

Another Look at Migration

While birth rates and natural population change are important, the lion's share of Houston's growth (75 percent) has been from people moving here. The 44th Kinder Houston Area Survey, released late in May, explores why people move to Houston along with their attitudes on international immigrants and a variety of other topics. It was conducted in January and February with over 9,800 respondents taking part across Harris, Montgomery, and Fort Bend counties.

MAIN REASON FOR MOVING TO HOUSTON

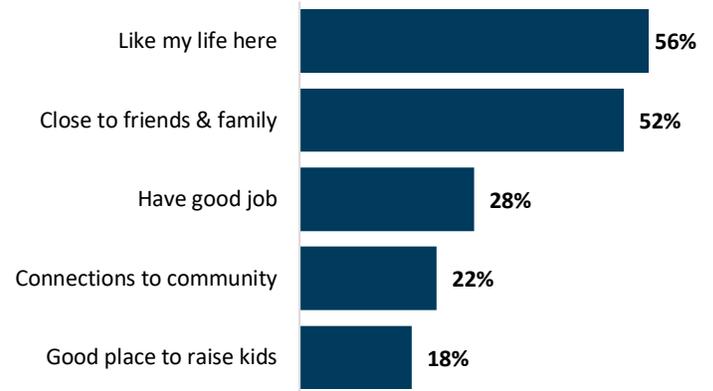


Source: 44th Kinder Houston Area Survey

The survey finds that almost half of all residents moved here as adults and have lived here for an average of about two decades. Houston's strong economy is a major reason they chose to come, with 49 percent moving for job-related reasons along with 7 percent for the low cost of living and 3 percent for housing.

People who arrive in Houston put down roots and grow to think of it as home. Nearly two-thirds of people who moved here as adults consider themselves to be "Houstonians." When asked why they choose to stay in the area, they frequently cite the quality of life here, relationships with family and friends, having a good job, and connections to the community.

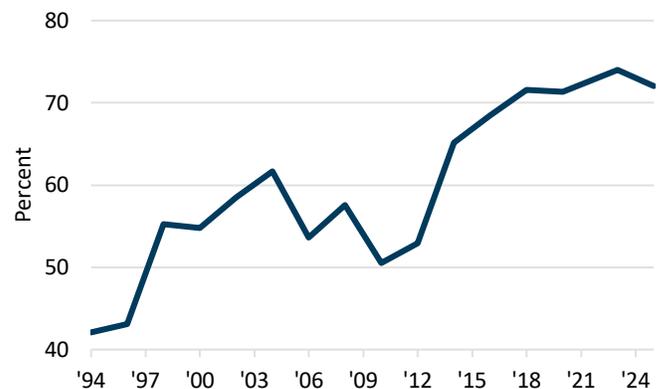
REASON FOR STAYING IN REGION, HARRIS COUNTY RESIDENTS



Source: 44th Kinder Houston Area Survey

Attitudes towards foreign immigrants remain positive, with 72 percent in Harris County saying they contribute more to the economy than they take. This represents a slight downtick from 74 percent in '23, but a meaningful and continued increase over the 42 percent recorded the first time the question was asked in '94.

SHARE OF HOUSTON RESIDENTS SAYING IMMIGRANTS CONTRIBUTE MORE THAN THEY TAKE



Source: Kinder Houston Area Survey Results

The [full 2025 survey results](#) can be found at the website for the Kinder Institute for Urban Research.

KEY ECONOMIC INDICATORS

Clicking on the hyperlinks below will provide additional details on that indicator.



Aviation — The Houston Airport System (HAS) handled 62.5 million passengers in the 12 months ending April '25. That represents a 2.6 percent increase over the 61.0 million handled over the same period last year and a continued improvement over pre-pandemic levels of travel. Domestic and international travel accounted for 49.5 million and 13.1 million passengers, respectively.



Energy — The U.S. Energy Information Administration (EIA) estimates that domestic crude production ticked up to 13.3 million barrels per day (b/d) in April, a continued increase from the recent low of 13.1 million b/d in January. The EIA expects oil production will continue to gradually rise over the year, reaching a record of 13.7 million b/d in December. However, the EIA's forecast was run before OPEC+ announced production increases that may lower oil prices and lead U.S. producers to cut back on new drilling.



Home Sales — Brokers closed on 26,295 single-family homes year-to-date through April '25, according to the Houston Association of Realtors (HAR). This represents a modest 0.5 percent decrease compared to the same period in '24, with home sales remaining relatively stable despite April's high volatility in financial markets. Home prices grew marginally while inventories rose to their highest levels in almost 15 years.



Inflation — U.S. inflation cooled in April to its lowest rate in four years. Prices, as measured by the Consumer Price Index for All Urban Consumers (CPI-U), rose 2.3 percent nationwide between April '24 and April '25. This represents a slight drop from the 2.4 percent annual increase recorded in March, and the lowest rate since February '21. Metro Houston's annual inflation rate in April was lower than the national rate at 1.2 percent.



Purchasing Managers Index — Economic growth in the Houston area slowed in April, according to the most recent Houston Purchasing Managers Index (PMI) prepared by the Institute for Supply Management-Houston. The overall PMI, which measures broad economic activity through a survey of supply chain executives, was 48.5 in April, a slight decrease from 49.7 in March. Despite the downward trend seen in the first months of '25, the overall economy

is still expanding, as indicated by a PMI above the neutral point of 45. Manufacturing increased to a PMI of 48.9, while non-manufacturing dropped to 48.5.



Sales Tax — Sales and use taxes collected by the 122 Houston-area cities that collect them totaled \$438.3 million during the first three months of '25, up 9.5 percent from the \$400.1 million collected over the comparable period in '24. Adjusted for inflation, collections are up 8.4 percent. These collections, which cover the purchases of both consumers and businesses, are a proxy for broad economic activity in the region. Sales early in '25 may have been inflated with businesses and consumers frontloading purchases ahead of tariffs.



Unemployment — Metro Houston's unemployment rate fell from 4.2 percent in March to 3.9 percent in April, according to the Texas Workforce Commission. Houston's April number came in slightly higher than the Texas rate of 3.7 percent but matched the U.S. rate. Unemployment rates also fell over the month for the U.S. and Texas, which is the typical pattern for April as seasonal factors led to more hiring in key sectors. Unemployment rates are up marginally compared to April last year across the three areas.



Vehicles — Houston-area dealers sold 378,371 new cars, trucks, and SUVs in the 12 months ending April '25, according to TexAuto Facts, published by InfoNation Inc. This represents an 8.1 percent increase in sales over the same period last year. Truck and SUV sales were up 10.2 percent, and car sales were up 0.8 percent.

Colin Baker, Margaret Barrientos, Clara Richardson, and Leta Wauson contributed to this issue of Houston: The Economy at a Glance.

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HOUSTON MSA NONFARM PAYROLL EMPLOYMENT

	April '25	March '25	April '24	Change From		% Change From	
				March '25	April '24	March '25	April '24
Total Nonfarm Payroll Jobs	3,470,200	3,455,800	3,429,800	14,400	40,400	0.4	1.2
Total Private	2,999,000	2,984,700	2,964,900	14,300	34,100	0.5	1.2
Goods Producing	554,000	551,900	548,500	2,100	5,500	0.4	1.0
Service Providing	2,916,200	2,903,900	2,881,300	12,300	34,900	0.4	1.2
Private Service Providing	2,445,000	2,432,800	2,416,400	12,200	28,600	0.5	1.2
Mining & Logging	80,900	80,100	78,200	800	2,700	1.0	3.5
Oil & Gas Extraction	38,200	37,900	37,100	300	1,100	0.8	3.0
Support Activities for Mining	41,000	40,700	39,700	300	1,300	0.7	3.3
Construction	233,700	233,300	232,000	400	1,700	0.2	0.7
Manufacturing	239,400	238,500	238,300	900	1,100	0.4	0.5
Durable Goods Manufacturing	147,900	146,900	148,300	1,000	-400	0.7	-0.3
Nondurable Goods Manufacturing	91,500	91,600	90,000	-100	1,500	-0.1	1.7
Wholesale Trade	181,400	180,900	177,800	500	3,600	0.3	2.0
Retail Trade	321,100	320,000	318,900	1,100	2,200	0.3	0.7
Transportation, Warehousing & Utilities	197,300	197,800	192,700	-500	4,600	-0.3	2.4
Utilities	24,800	24,800	23,900	0	900	0.0	3.8
Air Transportation	21,900	21,900	21,900	0	0	0.0	0.0
Truck Transportation	31,100	31,100	30,600	0	500	0.0	1.6
Pipeline Transportation	14,400	14,400	13,700	0	700	0.0	5.1
Information	29,100	29,200	30,200	-100	-1,100	-0.3	-3.6
Telecommunications	10,500	10,400	11,300	100	-800	1.0	-7.1
Finance & Insurance	116,900	117,100	117,000	-200	-100	-0.2	-0.1
Real Estate & Rental & Leasing	64,200	64,000	63,700	200	500	0.3	0.8
Professional & Business Services	562,500	556,900	561,800	5,600	700	1.0	0.1
Professional, Scientific & Technical Services	284,700	282,800	279,800	1,900	4,900	0.7	1.8
Legal Services	33,600	33,300	32,400	300	1,200	0.9	3.7
Accounting, Tax Preparation & Bookkeeping	28,700	28,700	29,300	0	-600	0.0	-2.0
Architectural, Engineering & Related Services	79,400	78,200	75,300	1,200	4,100	1.5	5.4
Computer Systems Design & Related Services	42,800	42,400	43,900	400	-1,100	0.9	-2.5
Admin & Support, Waste Mgt & Remediation	231,000	227,200	234,400	3,800	-3,400	1.7	-1.5
Administrative & Support Services	218,100	214,500	221,600	3,600	-3,500	1.7	-1.6
Employment Services	76,900	74,900	79,800	2,000	-2,900	2.7	-3.6
Private Educational Services	72,900	72,900	72,700	0	200	0.0	0.3
Health Care & Social Assistance	395,700	393,900	385,900	1,800	9,800	0.5	2.5
Arts, Entertainment & Recreation	41,900	41,700	40,500	200	1,400	0.5	3.5
Accommodation & Food Services	326,200	322,500	324,600	3,700	1,600	1.1	0.5
Other Services	135,800	135,900	130,600	-100	5,200	-0.1	4.0
Government	471,200	471,100	464,900	100	6,300	0.0	1.4
Federal Government	37,700	37,500	36,800	200	900	0.5	2.4
State Government	102,000	100,800	98,500	1,200	3,500	1.2	3.6
State Government Educational Services	55,400	54,600	54,100	800	1,300	1.5	2.4
Local Government	331,500	332,800	329,600	-1,300	1,900	-0.4	0.6
Local Government Educational Services	226,700	228,200	228,600	-1,500	-1,900	-0.7	-0.8

Source: Texas Workforce Commission