

The Changing Houston Region and Fort Bend's Role In It



Bill Fulton Director, Kinder Institute for Urban Research

Fort Bend EDC August 19, 2021



What Is The Kinder Institute?

The Kinder Institute for Urban Research builds better cities and improves people's lives by bringing together data, research, engagement, and action.

A translational research mission



What We Do

- Originally based on Steve Klineberg's Houston Area Survey
- Research-to-Action agenda
- on such topics as:
 - K-12 education
 - Resilience and Governance of the Region
 - Housing and Transportation
 - Workforce/Economic Development





Houston Community Data Connections

www.datahouston.org

Mission

The Kinder Institute's HCDC program seeks to facilitate the practical use of data by community leaders for decisionmaking and capacity building in Houston's communities.



Dashboard

Training



Data Analytics

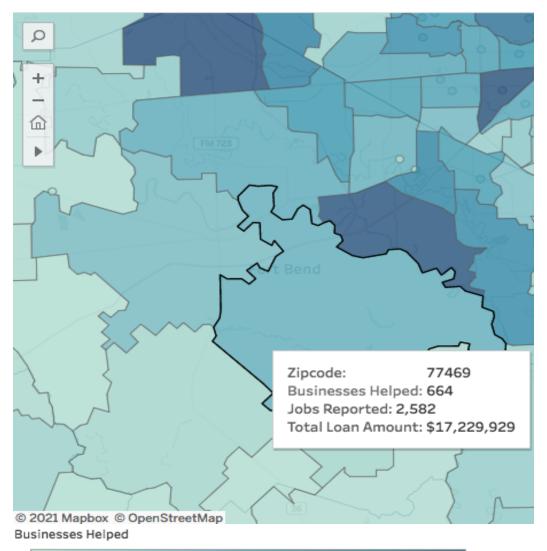




Example

Paycheck Protection Program (PPP) loans and the amount approved by ZIP code for loans under \$150,000 (April-August 2020)

Data Source: U.S. Small Business Administration. View more at https://www.hcdc.datahouston.org/ppploan





Example

2020 Fort Bend County employment trends by industry

- Monthly percent change in employment by industry
- Q4 average employment size

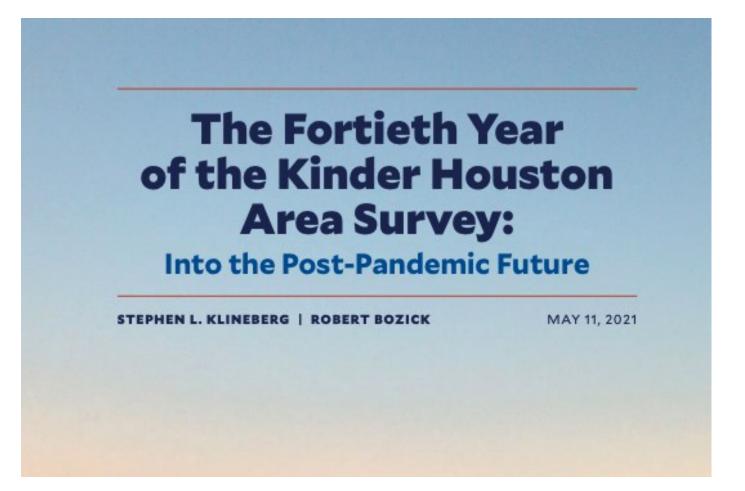
Industry	1	2	3	4	5	6	7	8	9	10	11	12	Q4 Avg. Employment Size
Accommodation and Food Services	0.0%	-0.2%	-1.8%	-33.2%	-19.9%	-12.7%	-15.1%	-14.1%	-13.5%	-10.3%	-9.6%	-8.5%	21,953
Administrative and Support and Waste Management and Remediation Services	0.0%	-1.1%	-0.4%	-12.0%	-9.5%	-7.5%	-5.1%	-2.9%	-4.2%	-3.3%	-0.8%	0.4%	9,902
Agriculture, Forestry, Fishing and Hunting	0.0%	1.9%	7.1%	-9.1%	-10.0%	-3.2%	-6.8%	6.8%	13.3%	12.9%	6.8%	-0.3%	314
Arts, Entertainment, and Recreation	0.0%	-0.1%	-0.9%	-60.9%	-48.7%	-26.7%	-26.1%	-26.2%	-28.0%	-27.5%	-27.0%	-22.8%	2,625
Construction	0.0%	6.2%	10.8%	5.0%	4.9%	1.4%	-2.2%	-8.0%	-12.2%	-11.3%	-12.5%	-12.9%	11,568
Educational Services	0.0%	2.3%	-2.3%	-25.3%	-20.5%	-15.9%	-16.6%	-11.0%	-11.1%	-8.1%	-7.4%	-7.5%	3,108
Finance and Insurance	0.0%	0.5%	0.7%	-1.5%	-1.2%	-1.6%	-1.6%	-0.9%	-2.0%	-0.2%	0.8%	0.1%	4,816
Health Care and Social Assistance	0.0%	0.8%	0.5%	-13.4%	-6.6%	-3.9%	-3.9%	-3.3%	-3.1%	-1.4%	-0.8%	-0.3%	27,684
Information	0.0%	-1.3%	-2.2%	-30.3%	-28.6%	-24.1%	-11.3%	-16.7%	-10.2%	-9.8%	-10.2%	-8.1%	2,069
Management of Companies and Enterprises	0.0%	0.3%	0.0%	-10.5%	-9.9%	-10.0%	-10.3%	-10.0%	-9.0%	-7.7%	-8.0%	-6.5%	820
Manufacturing	0.0%	0.9%	0.4%	-2.5%	-4.1%	-5.0%	-6.7%	-7.3%	-7.2%	-7.1%	-6.7%	-6.9%	13,678
Mining, Quarrying, and Oil and Gas Extraction	0.0%	1.1%	1.0%	-12.6%	-24.4%	-32.1%	-32.5%	-31.3%	-27.7%		-28.3%	-24.3%	2,520
Other Services (except Public Administration)	0.0%	2.1%	1.1%		-21.5%	-12.6%	-12.1%	-8.3%	-7.0%	-4.1%	-1.5%	-1.5%	5,787
Professional, Scientific, and Technical Services	0.0%	0.9%	0.0%	-4.0%	-2.6%	-2.6%	-1.8%	-2.2%	-3.8%	1.6%	2.3%	3.5%	10,436
Real Estate and Rental and Leasing	0.0%	0.4%	-1.2%	-6.8%	-2.3%	-2.1%	-0.7%	-0.4%	-1.6%	1.5%	1.7%	1.2%	2,698
Retail Trade	0.0%	-0.8%	-1.0%	-13.0%	-9.3%	-3.8%	-2.1%	0.8%	1.1%	3.3%	6.8%	8.9%	29,977
Transportation and Warehousing	0.0%	-15.6%	-16.3%	-13.0%	-7.9%	8.5%	13.7%	13.0%	16.0%	22.8%	43.4%	48.6%	5,502
Utilities	0.0%	-0.4%	-1.2%	-0.7%	-1.7%	-2.2%	-4.4%	-5.6%	-6.2%	-5.4%	-5.1%	-5.4%	720
Wholesale Trade	0.0%	0.9%	0.6%	-3.2%	-3.0%	-2.6%	-3.8%	-3.1%	-6.9%	-6.2%	-6.2%	-5.1%	8,021

Change

-60.9%



Klineberg Survey: Past and Future



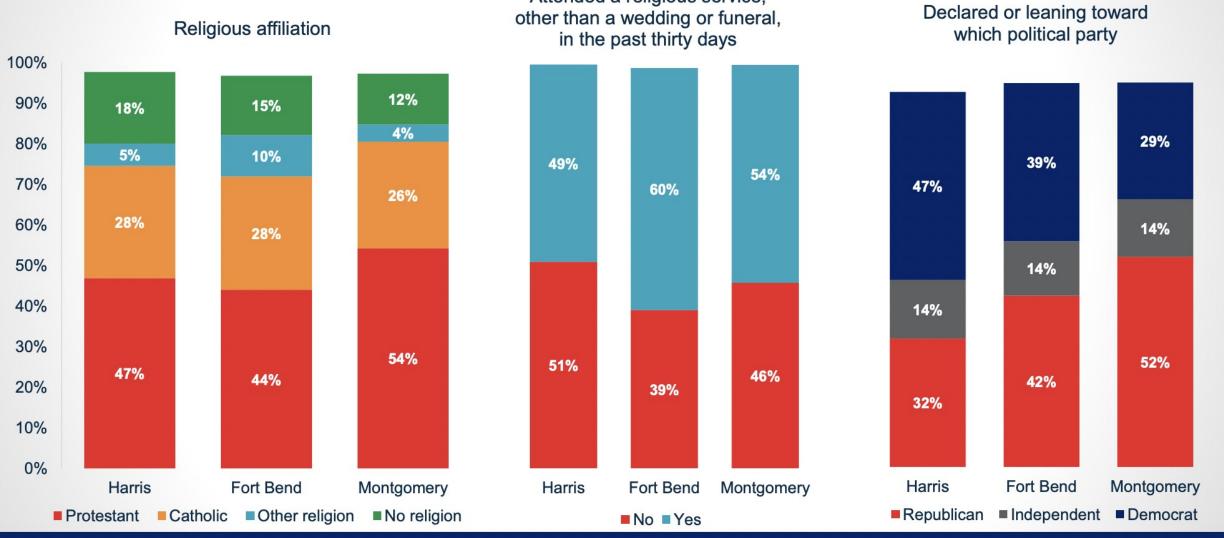
Greater Houston **Community Panel**

Welcome to the **Greater Houston Community Panel**



HELP SHAPE THE FUTURE OF THE CITY

County Differences in Religiosity and Party Affiliation (2015-2018, Combined) Attended a religious service,

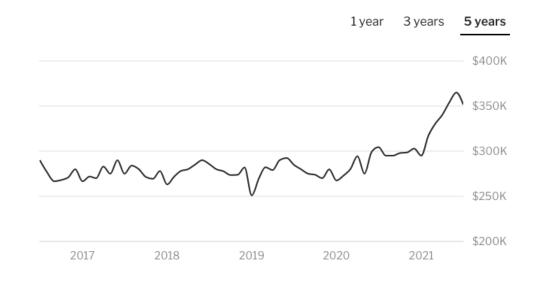




Source: Kinder Houston Area Survey (2015-18).



Growing Concern About Housing





HARRIS COUNTY HOUSING SURVEY

What We Heard

Sitio web en español aquí





Fort Bend's Position in the Region

People

• Land

• Economy

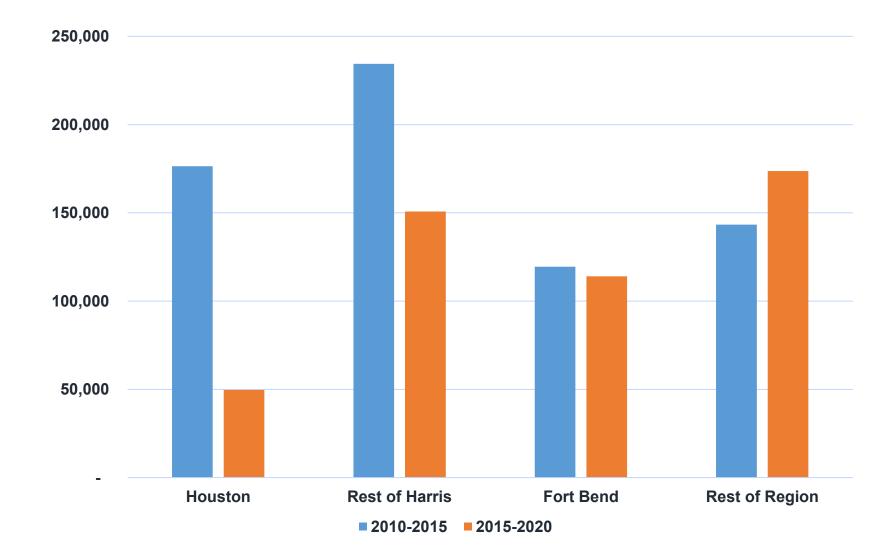






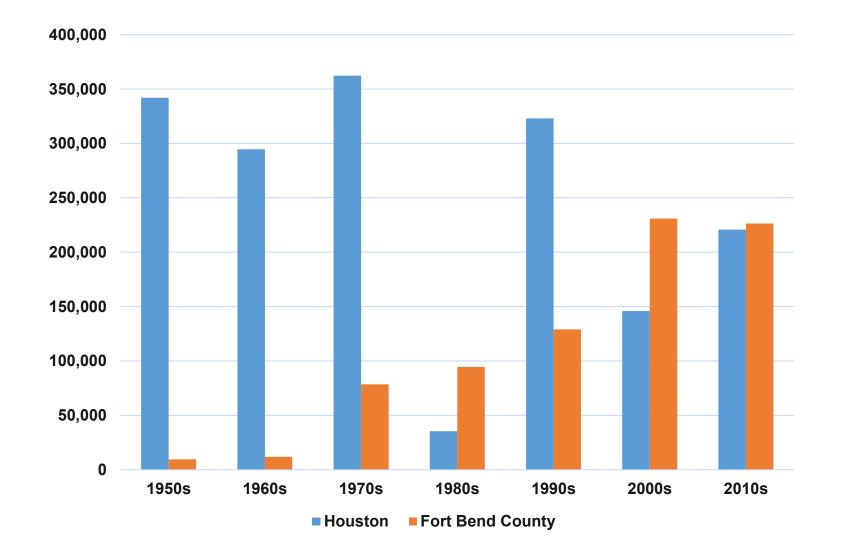


Population Growth, Houston Region, 2010-2020





Population Growth, Houston and Fort Bend County, 1950-2020

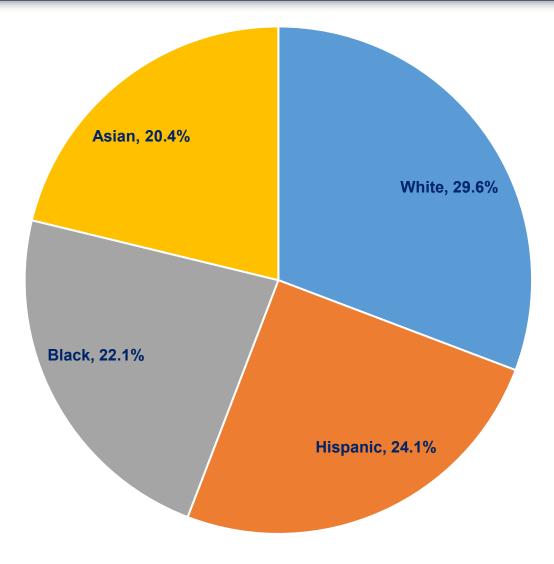




The Most Diverse County in America

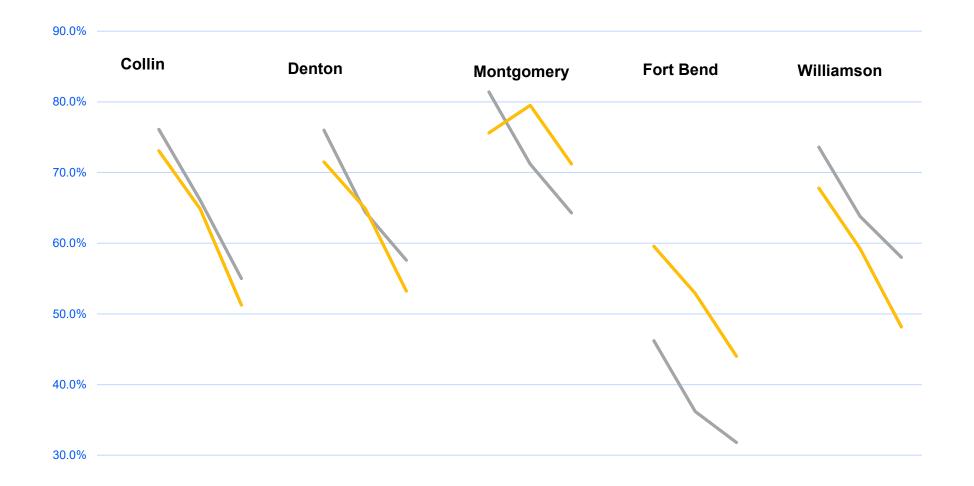
"You can't get much closer to $\frac{1}{4}$, $\frac{1}{4}$, $\frac{1}{4}$, $\frac{1}{4}$ than Fort Bend County!"





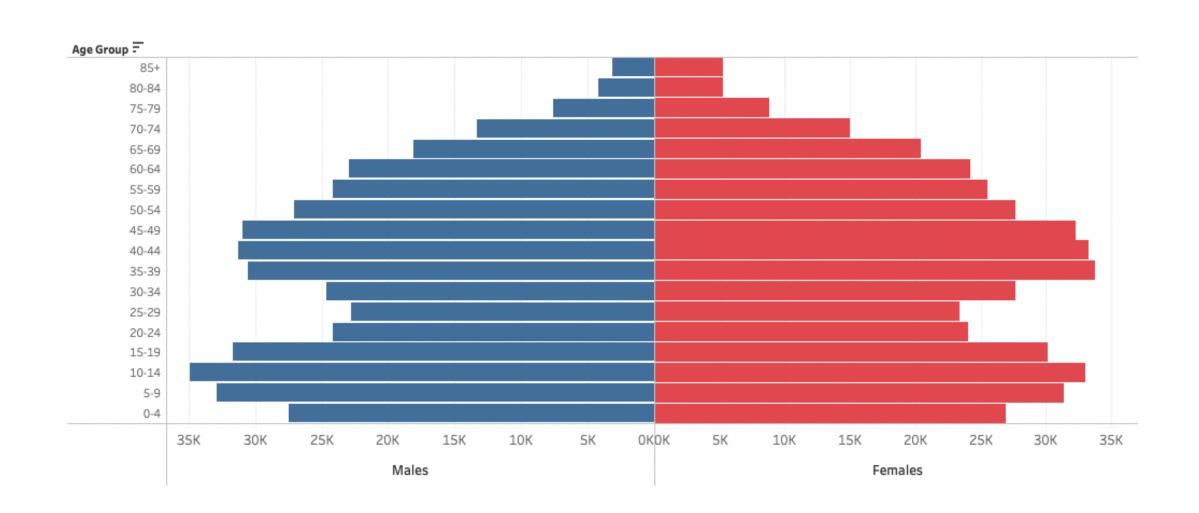


White Population and Republican Vote, 2012-2020





Fort Bend's Age Pyramid





- As more people come to Fort Bend after COVID to raise their families, what will they want?
- Will big houses, big lots, and good schools be enough?



Every indication suggests:

Yes, they want bigger houses, bigger lots, and good schools.

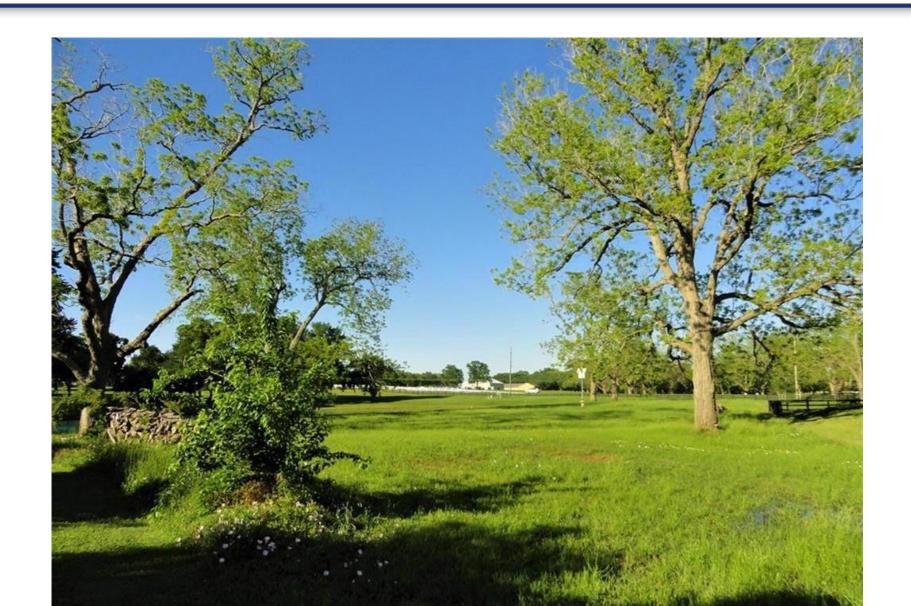
But they ALSO want

- Urban amenities
- Easy access to nature



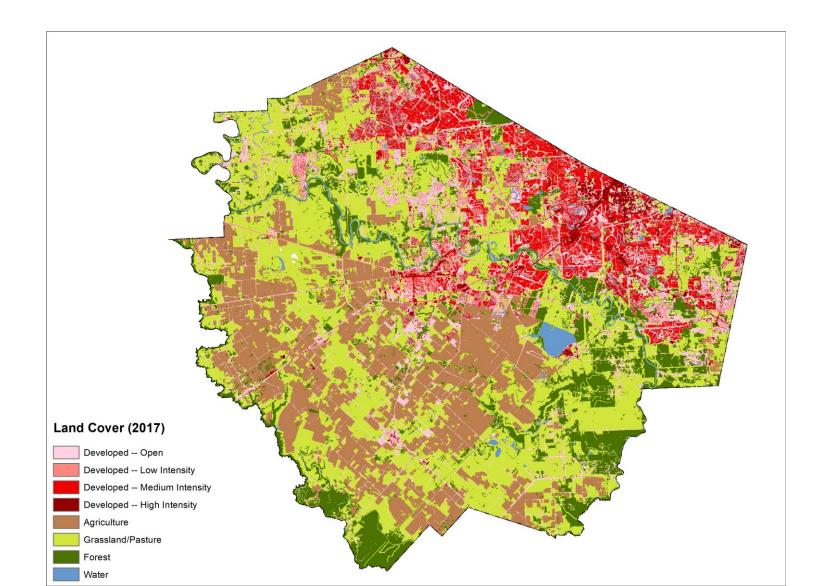






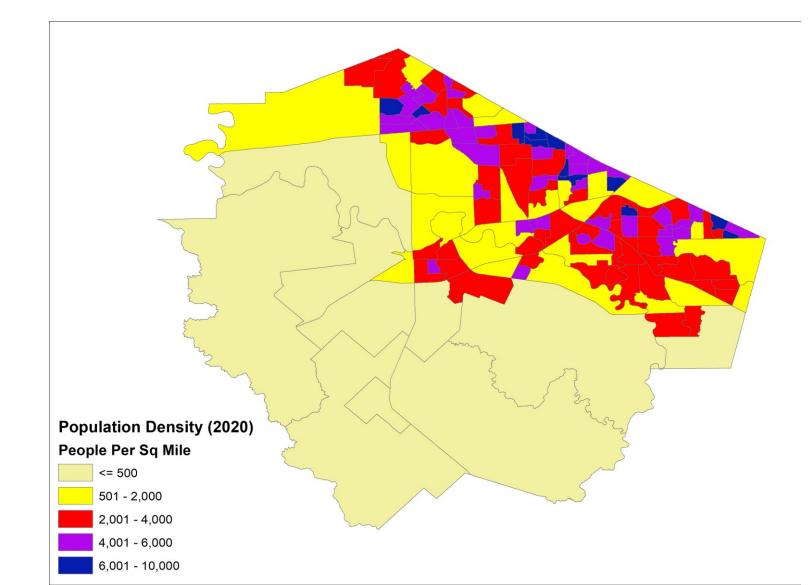


Developed and Undeveloped Land

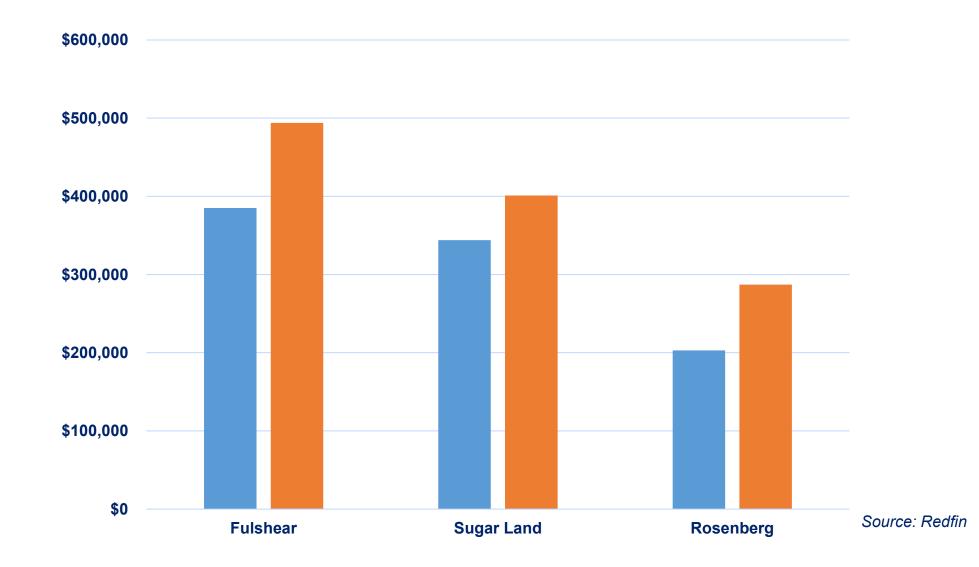




Population Density











- Your population will continue to grow a lot
 - But population growth will move gradually west.
- Home prices will continue to go up in some parts of the county
 The variation from one part of the county to another may grow.
- Can you husband your land resources for maximum benefit for your residents and your economy?









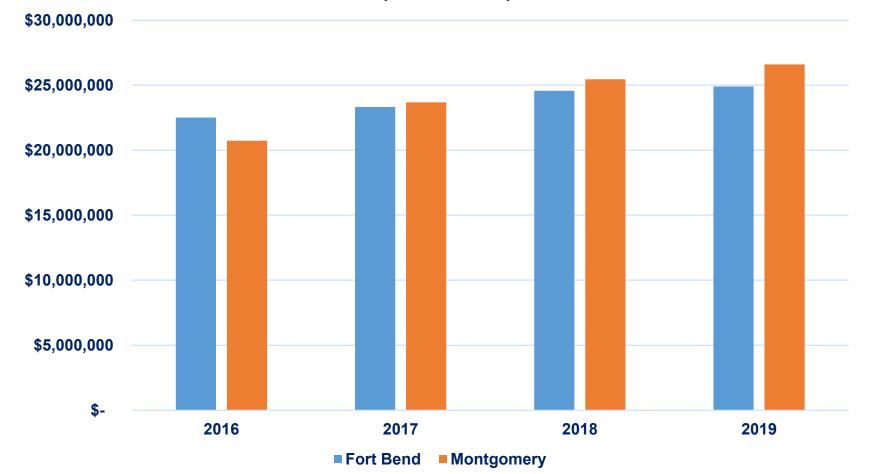
\$400,000,000.00 \$350,000,000.00 \$300,000,000.00 \$250,000,000.00 \$200,000,000.00 \$150,000,000.00 \$100,000,000.00 \$50,000,000.00 \$-

County GDP, 2019 (In Millions)

■ Harris ■ Fort Bend ■ Montgomery

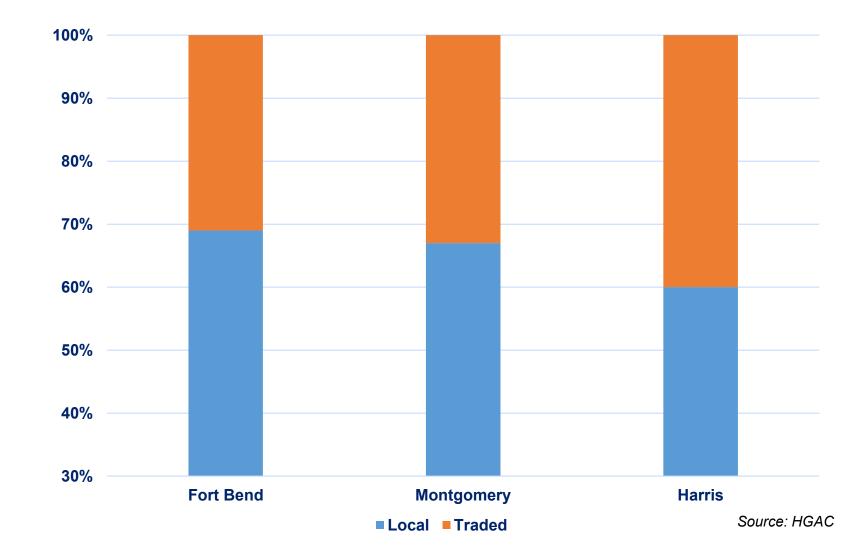


GDP, Fort Bend and Montgomery Counties, 2015-2019 (In Millions)





Local v. Traded Economy, by County, 2014







- Jobs in the region are going West and North in the region as opposed to Southwest
- How to increase traded goods jobs?
- Recruit or grow or both?
- Think not what businesess you are recruiting but what assets you are building
 - Are you using your people and your land wisely to do it?





- One of America's great demographic success stories
- Significant assets: People, land, businesses
- Can you use those assets to build a truly powerful economy?

