

# FORT BEND COUNTY ECONOMIC RESILIENCE PROFILE

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## Introduction

Economic resilience is the ability to withstand and prevent disruptions to the economy. The most common types of disruptions include downturns in the economy or in a key industry; the exit of a major employer; and natural or man made disasters.

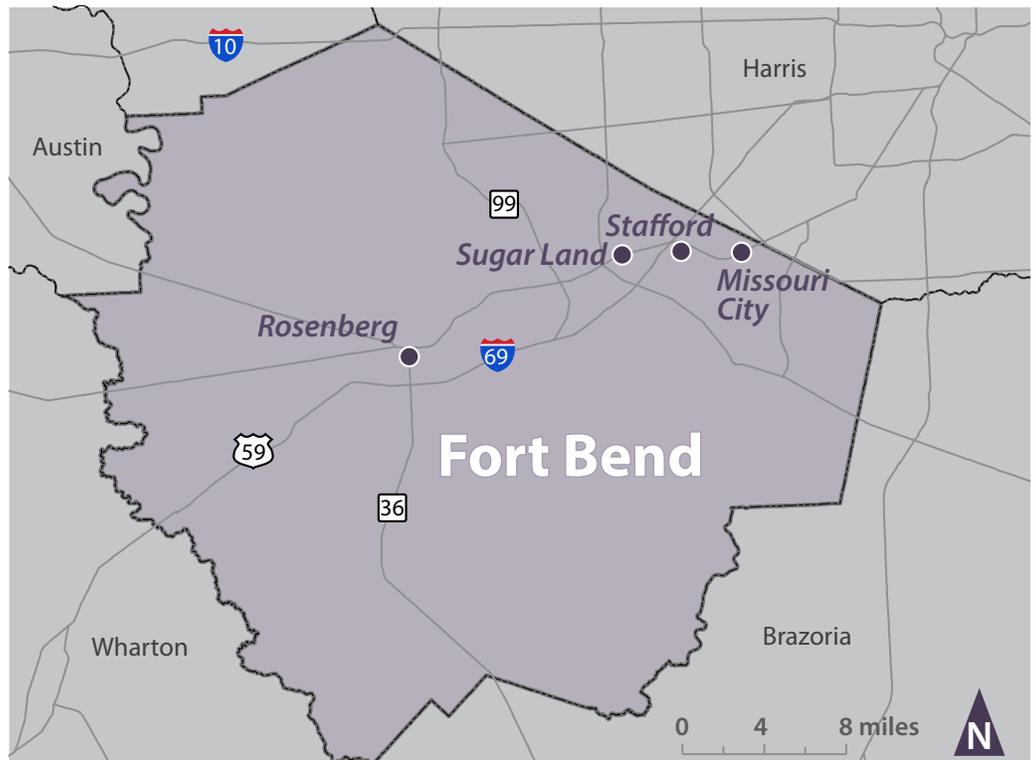
Creating a resilient economy requires the ability to anticipate risk, evaluate how risk can impact economic assets, and build the capacity to respond to disruptions.

This profile is intended to provide an overview of the factors affecting the future growth, development and resilience of Fort Bend County and it's economy by providing key data points on the economy, demographics, and other useful information.

## Fort Bend County Boundaries

- Fort Bend County
- Other counties
- Top 4 cities
- Major roads

County Seat: Richmond  
Largest City: Sugar Land



# Fort Bend County Overview

Fort Bend County was the tenth fastest growing county in the United States in 2016. Between 1980 and 2015, the population grew by a remarkable 447%. It is anticipated that Fort Bend County's population will grow from 741,237 in 2016 to 1,271,000 residents by 2040. Fort Bend County is the 10th most populous county in Texas, and, with a median household income of \$89,200, it's among the wealthiest counties in the state. Fort Bend County is known as the most diverse county in America, having nearly equal division among the nation's four major ethnic communities: Asian, black, Latino, and white residents.

Fort Bend County is southwest of Harris County on the Texas Gulf Coastal Plain. The county seat of Richmond, which is nearly in the center of the county, is 30 miles southwest of downtown Houston; its population is estimated to be 12,092. Other cities with populations over ten thousand include Houston (with 42,645 residents in Fort Bend County), Missouri City (68,362), Rosenberg (36,937), Stafford (18,113), and Sugar Land (88,177). Nearly two-thirds (445,389) of Fort Bend County residents live in unincorporated areas. Fort Bend County has many bedroom communities and master planned communities, sixty-five percent of Fort Bend County residents commute to Harris County for work. Major transportation corridors

include Interstates 10 and 69, U.S. Highway 90, and State Highways 6, 36, and 99. The county has three toll roads the Fort Bend Parkway, Grand Parkway, and Westpark Tollway. The county is served by the Union Pacific and BNSF railroads.

The Brazos River flows northwest to southeast through Fort Bend County for approximately 90 miles and drains the county's broad central floodplain. The San Bernard River, which forms the county's western boundary, drains the western quarter of the county. The north-eastern half of the county is largely suburban, with major master-planned communities along the U.S. 59 corridor. The south-western half remains largely rural, but is rapidly urbanizing. Agriculture is still a significant force in the county's economy, annual agricultural production accounted for \$103.8 million, including nursery crops, cotton, corn, hay, and cattle production. Nearly 90% of the value was from crop sales, while 11% was livestock sales. Fort Bend County has a diverse economy, with residential construction, engineering services, healthcare, and the energy sectors as major employers and economic drivers. It has six private sector employers with over one thousand employees. The Fort Bend Economic Development Council is actively seeking to recruit companies in the medical devices, food processing, and pharmaceuticals industries to continue to diversify and attract new employers.



Sugar Land Town Square provides a mix of restaurants, shops, offices, hotel rooms, and condominiums.

## Recent Disruptions to the Economy

Fort Bend County was impacted by several severe flooding events in recent years; including Hurricanes Ike (2008) and Harvey (2017), and the Tax Day (2015) and Memorial Day (2016) floods. At their peak, the floodwaters from Hurricane Harvey covered approximately 22% of the county, and the overall impact to the county's economy is still being assessed. The collapse in the price of a barrel from \$110 in 2014 to \$30 in 2016 of oil impacted the energy sector, forcing some companies to lay-off workers; although no major employers closed their doors. The downturn negatively affected home sales and retail in the county. The droughts of 2010-2013 caused significant damages to agricultural producers, including many cattle ranchers who were forced to reduce their herds. The drought also caused public maintenance costs to rise with shifting roadbeds and broken pipes. The Great Recession caused unemployment to spike in the county from 3.6% in April of 2008 to 8.1% in January of 2010.

## Economic Resilience Strategies

Fort Bend County's economic growth continues at an enviable pace. Fort Bend County made strides to diversify its economic base and attract employers from targeted industries. Drainage and stormwater management continues to be an issue for the county. Fort Bend County is a largely residential and would benefit from the development of a central business district to serve as an employment node. Unless there are enhancements to transportation infrastructure, commute times to Harris County will continue to increase as the population of both counties continues to grow.

## Recommendations

Fort Bend County's economy will be better able to withstand, avoid, and recover from disruptions if it is able to:

Continue to attract jobs and commercial development to Fort Bend County through targeted industry recruitment.

Coordinate with master-planned community developers to enhance stormwater drainage and retention, and work with the developers to reduce the impacts of flooding through strategies such as adopting low impact development regulations.

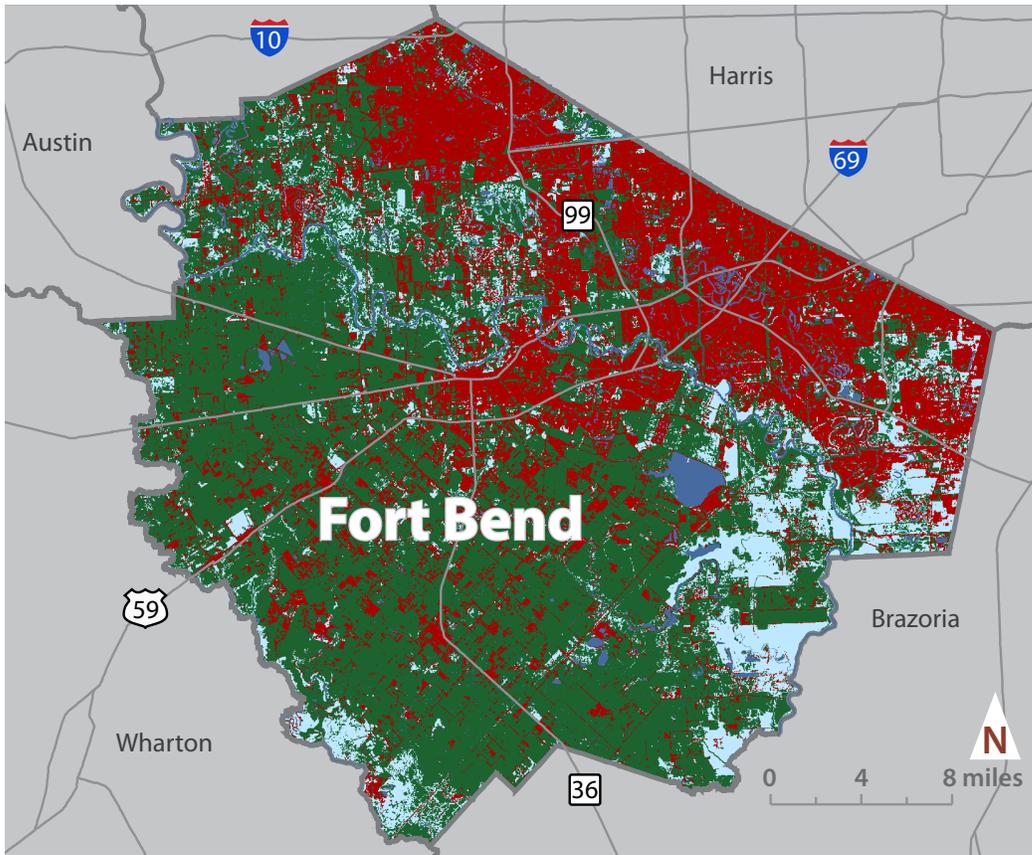
Assess the impacts of emerging transportation technologies and how Fort Bend County can expand transportation options for residents to maintain mobility to employment centers.

Continue and expand initiatives to enhance livability in Fort Bend County.

Investigate potential strategies for better coordinated county-wide flood control.

Continue coordination with Brazoria-Fort Bend Rail District on a rail connection to the Port of Freeport to enhance freight movement.

# Land Use and Demographics



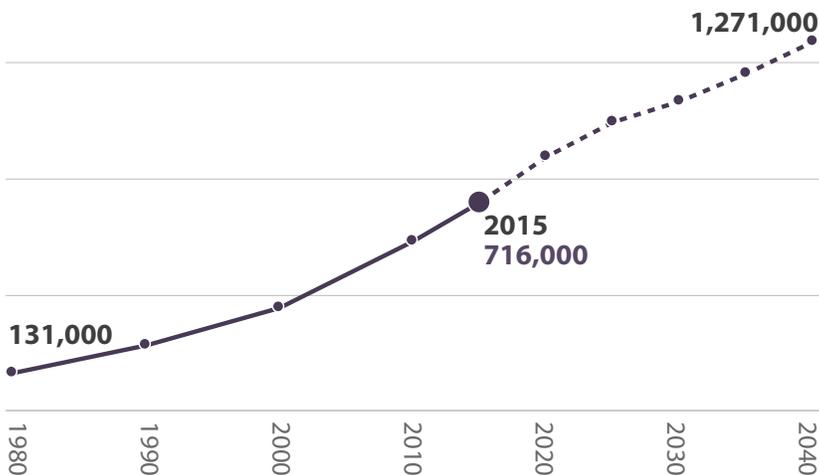
## Fort Bend County Land Use

- Other counties
- 2% Open water
- 31% Developed Land
- 12% Wetlands
- 55% Forest, shrubs, pasture, grasslands, barren lands, and cultivated crops

Fort Bend County has experienced significant urbanization in the north, in the areas adjacent to Harris County, while the south of the County currently retains its rural character.

## Population Growth Forecast

Fort Bend County grew by 447% from 1980 to 2015 and is expected to reach 1,271,000 residents by 2040.



## Top 10 City Populations

The City of Sugar Land is Fort Bend County's largest incorporated municipality.

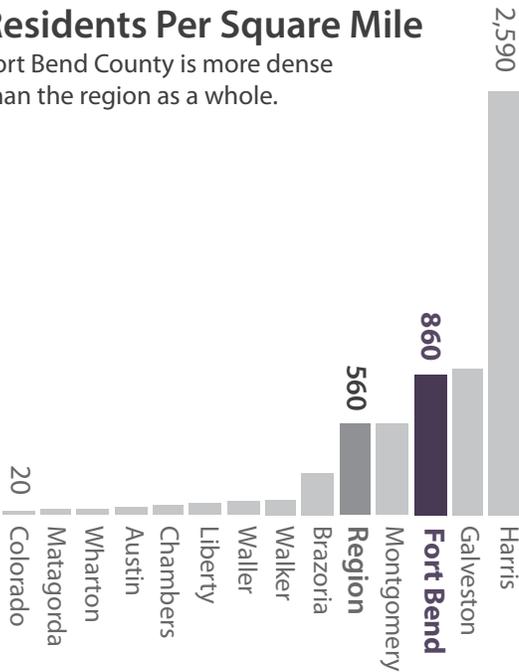
- 88,177 Sugar Land
- 68,362 Missouri City\*
- 42,645 Houston\*
- 36,937 Rosenberg
- 18,113 Stafford\*
- 12,092 Richmond
- 7,925 Fulshear
- 4,731 Meadows Place
- 3,410 Weston Lakes
- 3,078 Needville

\*The municipality spans multiple counties. Only the population residing in Fort Bend County is shown here.

# Land Use and Demographics

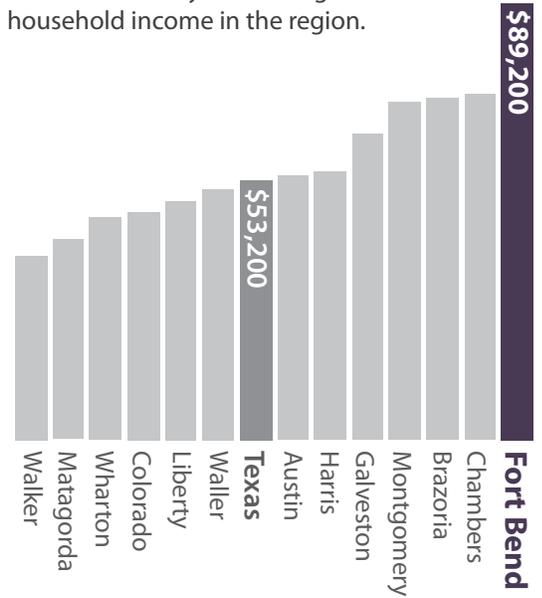
## Residents Per Square Mile

Fort Bend County is more dense than the region as a whole.



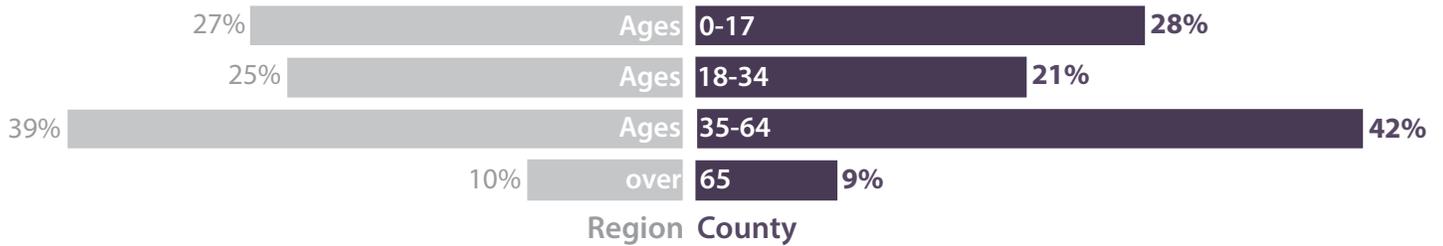
## Median Household Income

Fort Bend County has the highest median household income in the region.



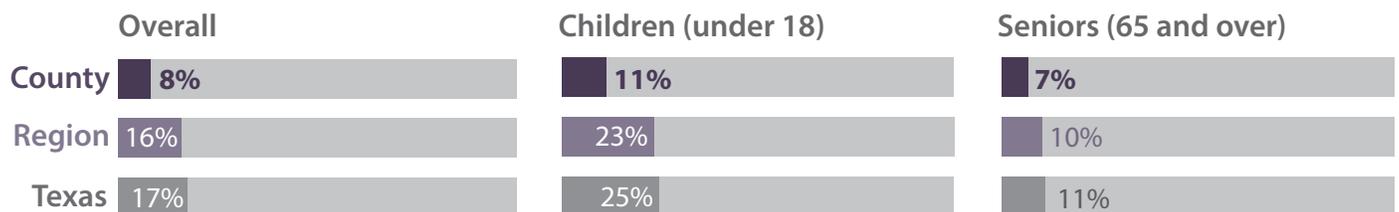
## Age

Fort Bend County has a similar age profile as the region.



## Poverty Rate

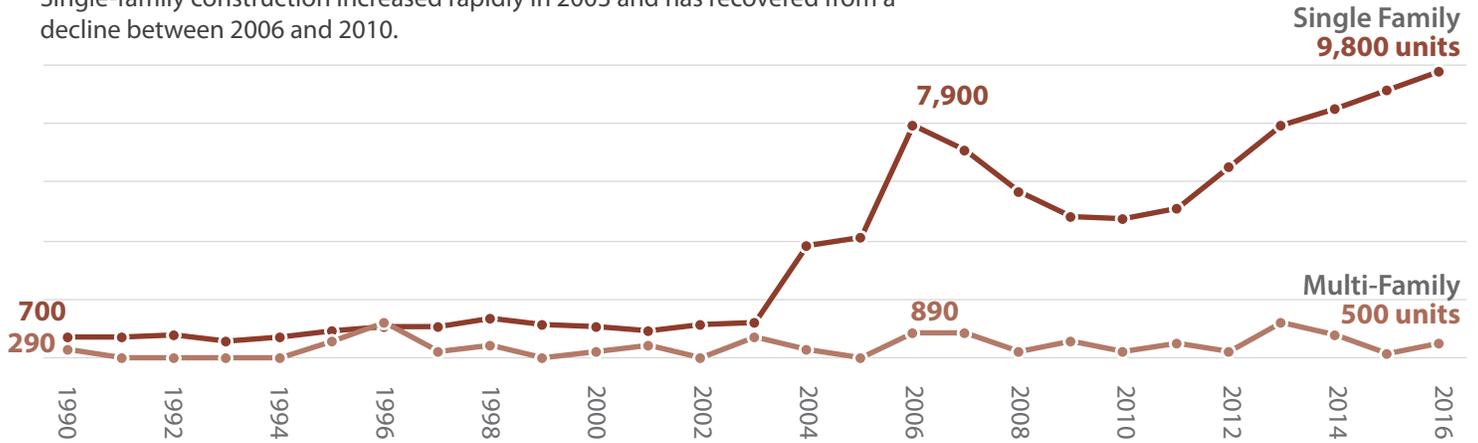
Fort Bend County has a lower rate of poverty than the region, particularly for children.



# Housing

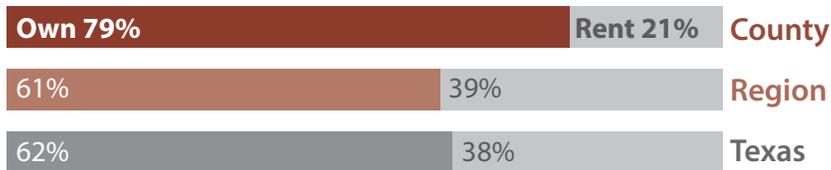
## Building Permits Issued

Single-family construction increased rapidly in 2003 and has recovered from a decline between 2006 and 2010.



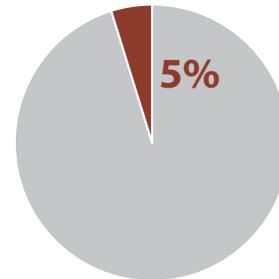
## Housing Tenure

Fort Bend County has a higher rate of homeownership than the region or the state.



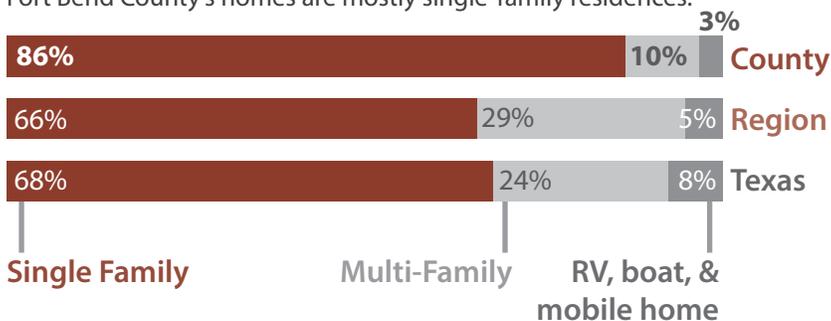
## Vacant Housing Units

Fort Bend County has the lowest rate of vacant housing in the region.



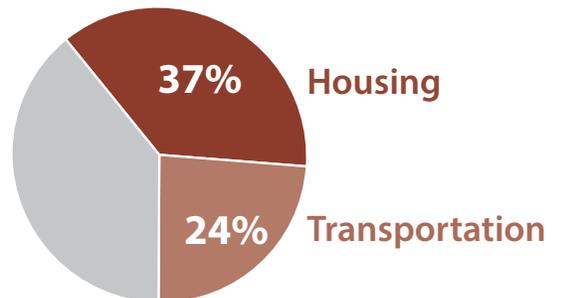
## Housing Type

Fort Bend County's homes are mostly single-family residences.



## Living Costs

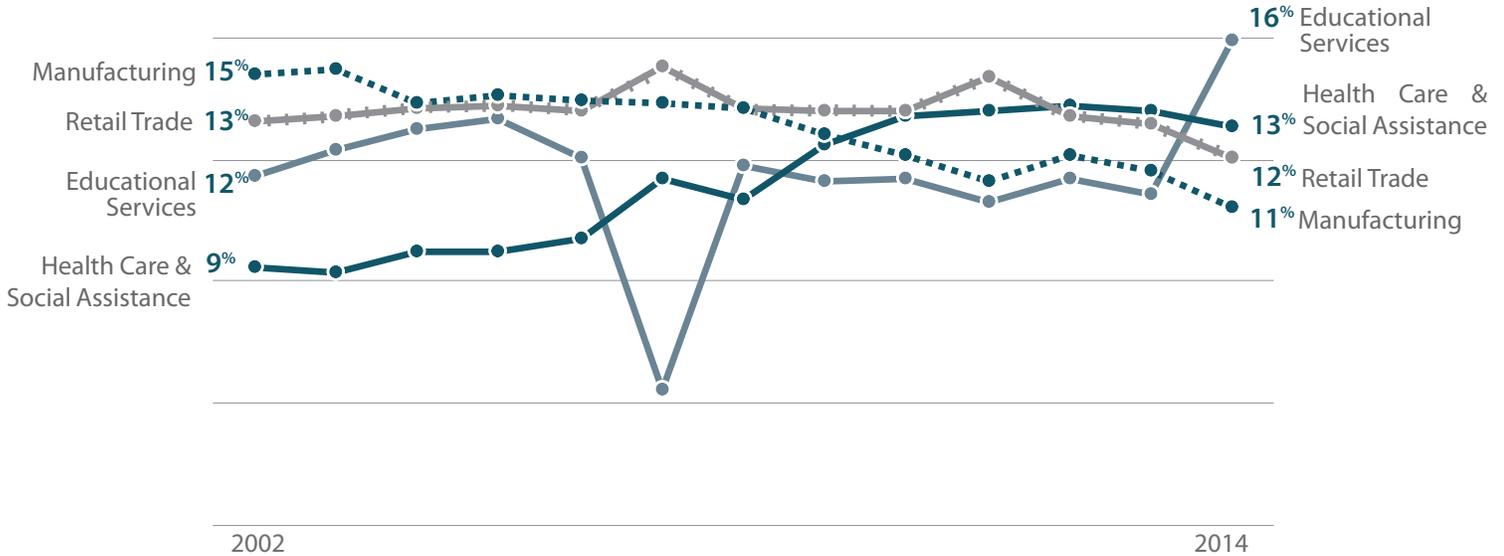
Fort Bend County households spend 61% of their income on transportation and housing.



# Economy

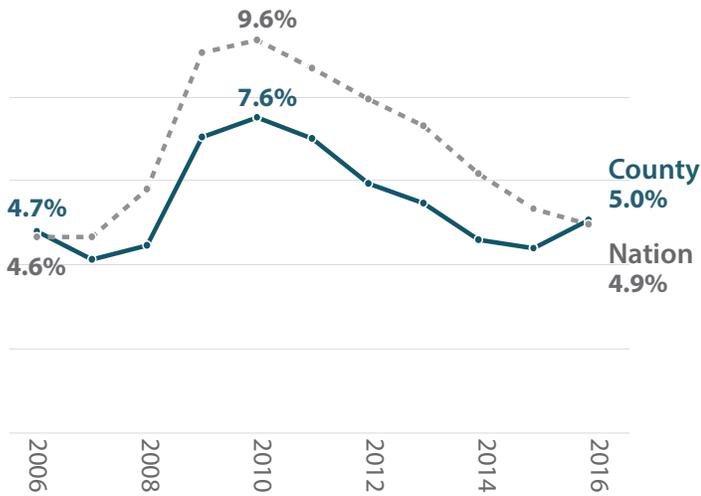
## Top Industries by Percent of Overall Jobs

Employment in Fort Bend County remained diverse between 2002 and 2014, with each of the top four industries employing more people in 2014 than in 2002.



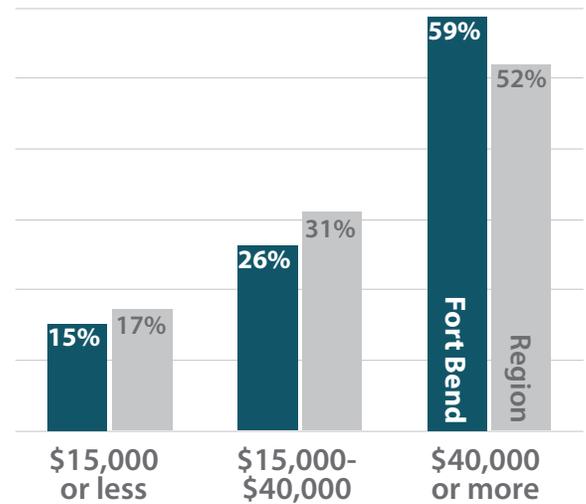
## Unemployment Rate

Fort Bend County's unemployment was lower than the nation from 2006 to 2015, but surpassed it in 2016.



## Earnings of Residents

Nearly 60% of Fort Bend County residents earn over \$40,000 annually, a higher percentage than the region.



# Education, Hazard Risks, and Commute

## Median Earnings by Educational Attainment

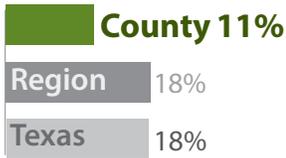
A Fort Bend County resident with a graduate or professional degree makes, on average, \$60,900 more than a resident with less than a high school education annually.



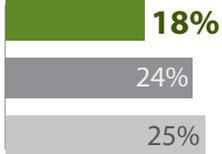
## Educational Attainment

A high percentage of Fort Bend County residents have completed a bachelor's degree or more.

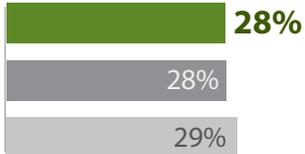
### Less than High School



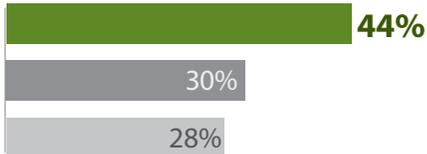
### High School or Equivalent



### Some College or Associate's

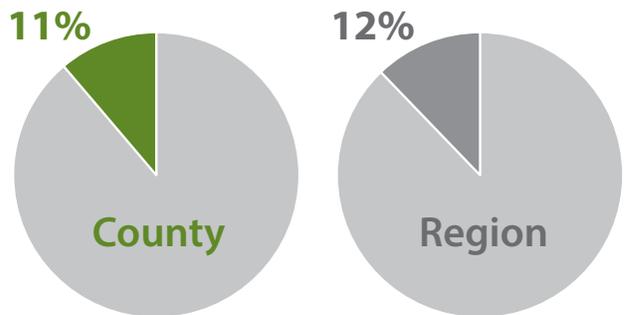


### Bachelor's Degree or More



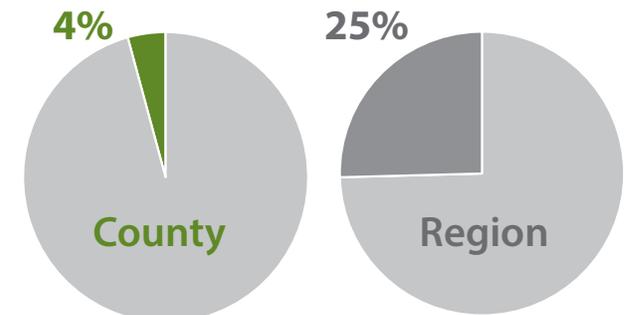
## Residents in 100-year Floodplain

About the same portion of Fort Bend County residents live in a 100-year floodplain as the region.



## Residents in Hurricane Evacuation Zone

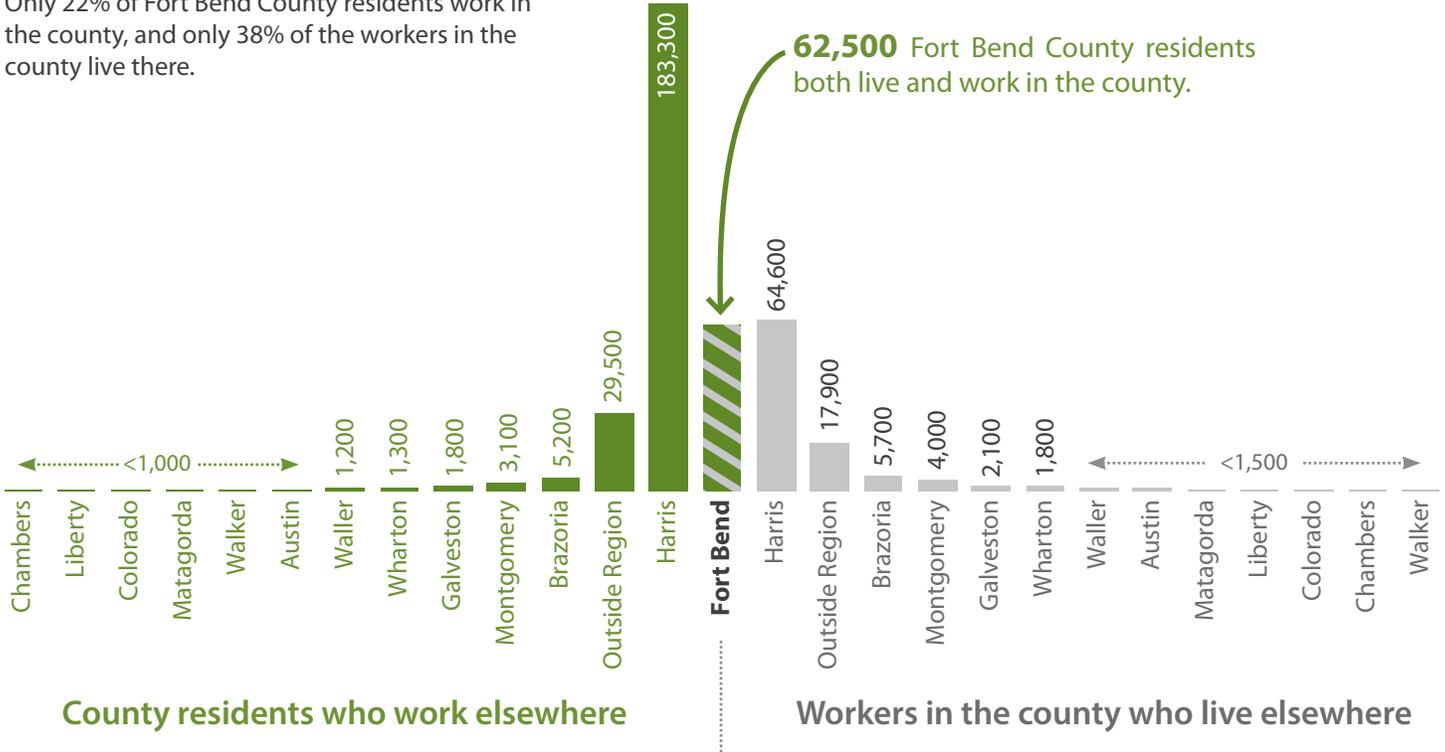
Fewer than 4% of Fort Bend County residents live in a hurricane evacuation zone, as opposed to 25% in the region.



# Education, Hazard Risks, and Commute

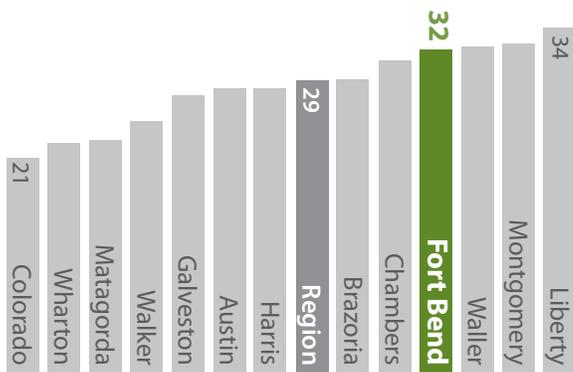
## Workers' Job & Home Destinations

Only 22% of Fort Bend County residents work in the county, and only 38% of the workers in the county live there.



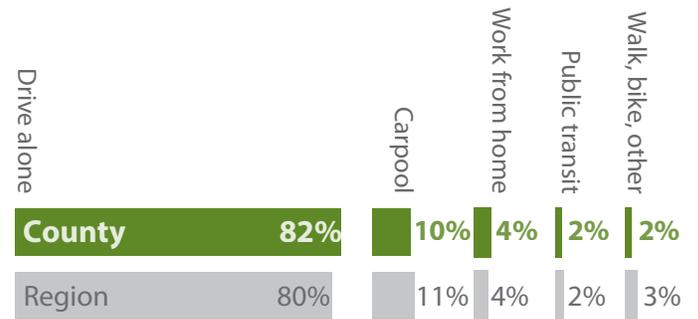
## Mean Commute to Work (minutes)

Fort Bend County workers commute for a longer amount of time than the region as a whole.



## Commute Mode to Work

Fort Bend County workers have similar commute patterns as the regional workforce.



# Economic Clusters

A cluster is a concentration of related businesses that make the area more competitive in those industries. Clusters exist where a set of related industries in a given location reach critical mass. Clusters enhance productivity and spur innovation by bringing together technology, information, specialized talent, competing companies, academic institution, and other organizations.

Traded clusters are groups of related industries that serve markets beyond the region in which they are located. Local clusters, in contrast, consist of industries that serve the local market. They are prevalent in every region of the country, regardless of the competitive advantages of a location.

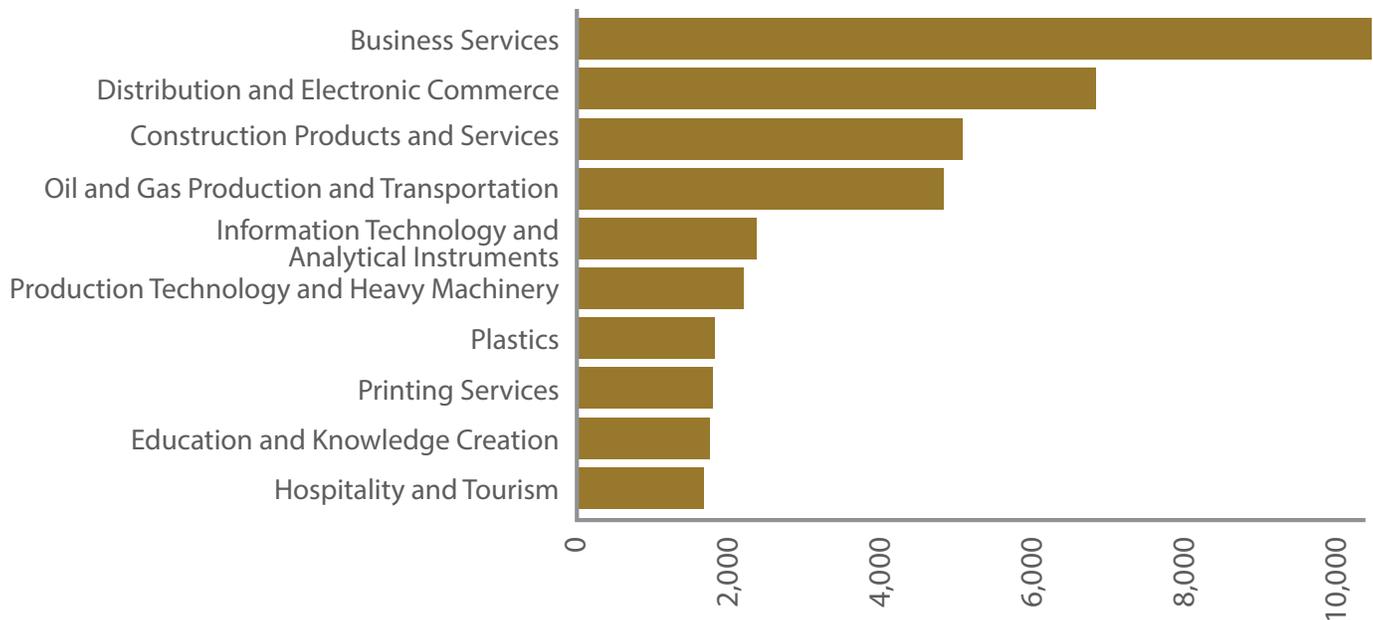
## Traded v. Local Clusters

This diagram demonstrates the county's split between the traded and local sectors of the economy, based on 2014 data from the U.S. Census.



## Employment by Cluster

This bar graph demonstrates Fort Bend County's employment by each cluster. It is based on 2014 data from the U.S. Census.



# Local Planning

These plans highlight efforts in Fort Bend County to plan for disaster recovery and economic resiliency. The economic elements of the plans are identified.

## Fort Bend County Hazard Mitigation Plan



Fort Bend County developed its first Hazard Mitigation Plan in 2005 because of increasing awareness that natural and man-made hazards, especially flood hazards, had the potential to affect the County and its citizens. Fort Bend County has experienced multiple hazard events between 1965 and 2010. Since

1965, Fort Bend County has received nine major Presidential Disaster Declarations. Of the nine Presidential Disaster Declarations that Fort Bend County received between 1965 and 2010, four of these events were floods, three were hurricanes and two were tropical storms. The original Hazard Mitigation Plan set the stage for long-term disaster resistance through identification of actions that will reduce the exposure of people and property to natural hazards.

# Data Sources

## Fort Bend County Overview

1. U.S. Census
2. U.S. Census
3. U.S. Census
4. Kinder Houston Area Survey
5. U.S. Census
6. U.S. Census
7. U.S. Census
8. Houston-Galveston Area Council
9. USDA Census of Agriculture
10. USDA Census of Agriculture
11. Fort Bend Economic Development Council

## Recent Disruptions to the Economy

12. Community Impact Newspaper, Fort Bend County Office of Emergency Management
13. Saint Louis Federal Reserve, Bureau of Labor Statistics

## Graphics

- County Boundaries Map. Houston-Galveston Area Council, 2017.
- County Land Use Map. Houston-Galveston Area Council, 2017.
- Population Growth Forecast. Houston-Galveston Area Council, 2017.
- Residents Per Square Mile. Houston-Galveston Area Council, 2017.

Age. U.S. Census Bureau, 2011-2015 American Community Survey, 5-Year Estimates, Table B01001.

Median Household Income. U.S. Census Bureau, 2011-2015 American Community Survey, 5-Year Estimates, Table S2503.

Poverty Rate. U.S. Census Bureau, 2011-2015 American Community Survey, 5-Year Estimates, Table S1701.

Building Permits Issued. U.S. Census Bureau, Building Permits Survey, 1990-2015.

Housing Tenure. U.S. Census Bureau, 2011-2015 American Community Survey, 5-Year Estimates, Table DP04.

Vacant Housing Units. U.S. Census Bureau, 2011-2015 American Community Survey, 5-Year Estimates, Table DP04.

Housing Type. U.S. Census Bureau, 2011-2015 American Community Survey, 5-Year Estimates, Table DP04.

Living Costs. Center for Neighborhood Technology 2013 H+T<sup>®</sup> Index.

Top Industries by Percent of Overall Jobs. U.S. Census Bureau, 2002-2014, OnTheMap Application, Longitudinal-Employer Household Dynamics Program.

Unemployment Rate. U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics, 2006-2016.

Earnings of Residents. U.S. Census Bureau, 2014, OnTheMap Application, Longitudinal-Employer Household Dynamics Program.

Median Earnings by Educational Attainment. U.S. Census Bureau, 2011-2015 American Community Survey, 5-Year Estimates, Table B20004.

Educational Attainment. U.S. Census Bureau, 2011-2015 American Community Survey, 5-Year Estimates, Table S1501.