

HOUSTON

GREATER HOUSTON **PARTNERSHIP.**

HOUSTON.ORG

GREATER HOUSTON PARTNERSHIP

Making Houston the best place to live, work and build a business.

Serves the **12-county** Greater Houston region

Represents more than **900 businesses and institutions**

Members accounts for **one-fifth of Houston's workforce**



Promotes economic development and trade

Advocates for effective public policy

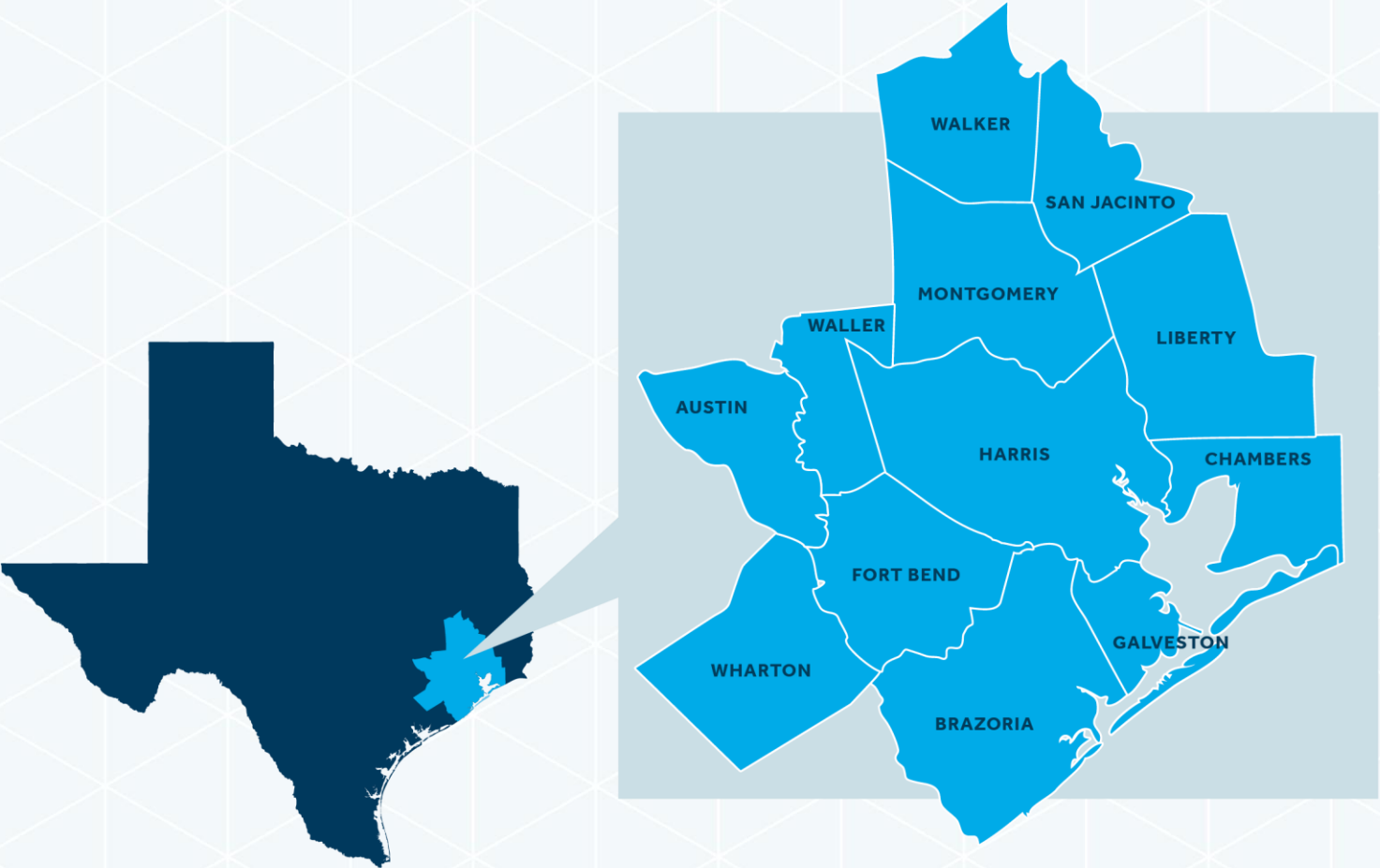
Convenes Houstonians on key issues



REGIONAL OVERVIEW

HOUSTON

GREATER HOUSTON REGION

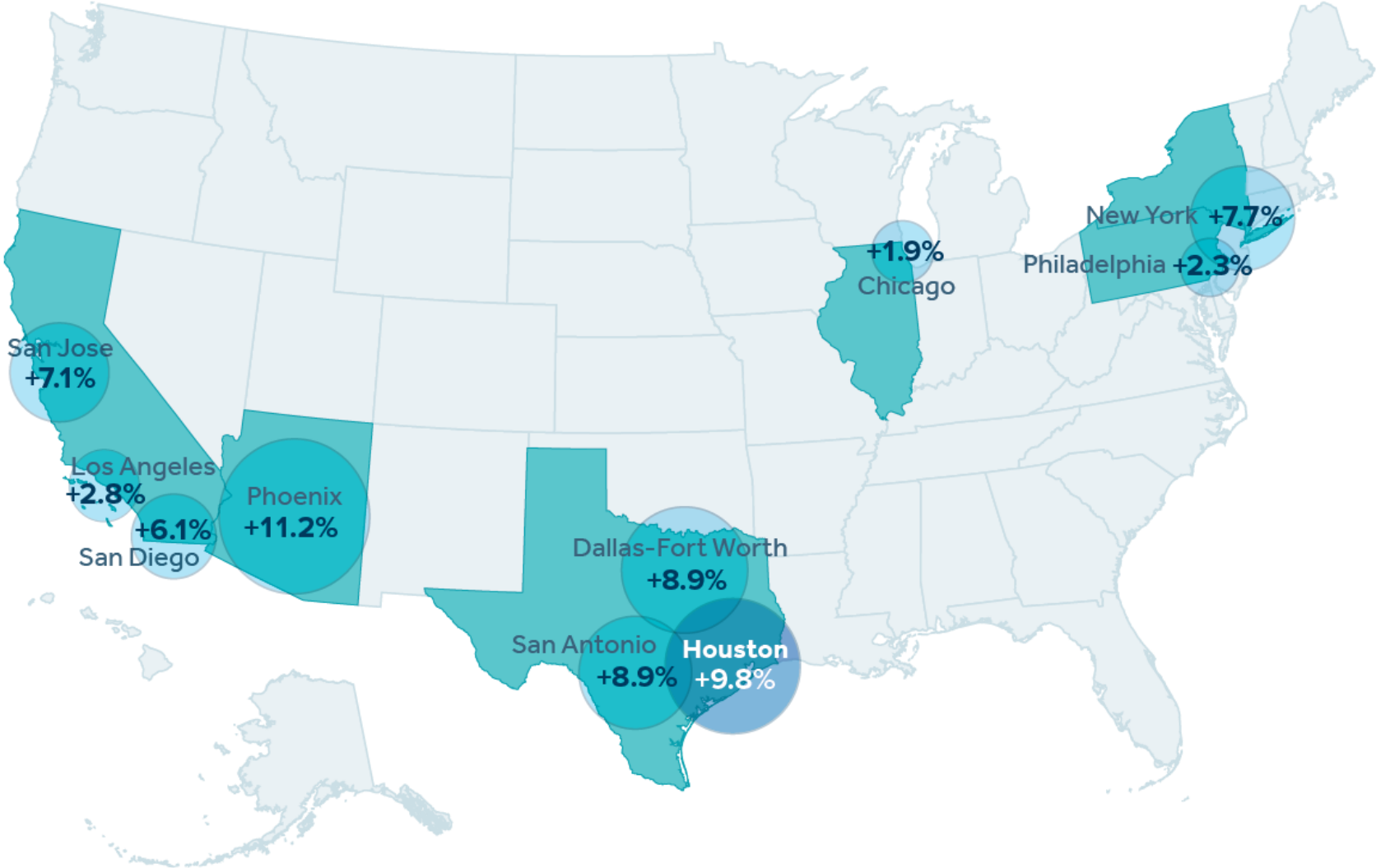


4th Largest
U.S. city

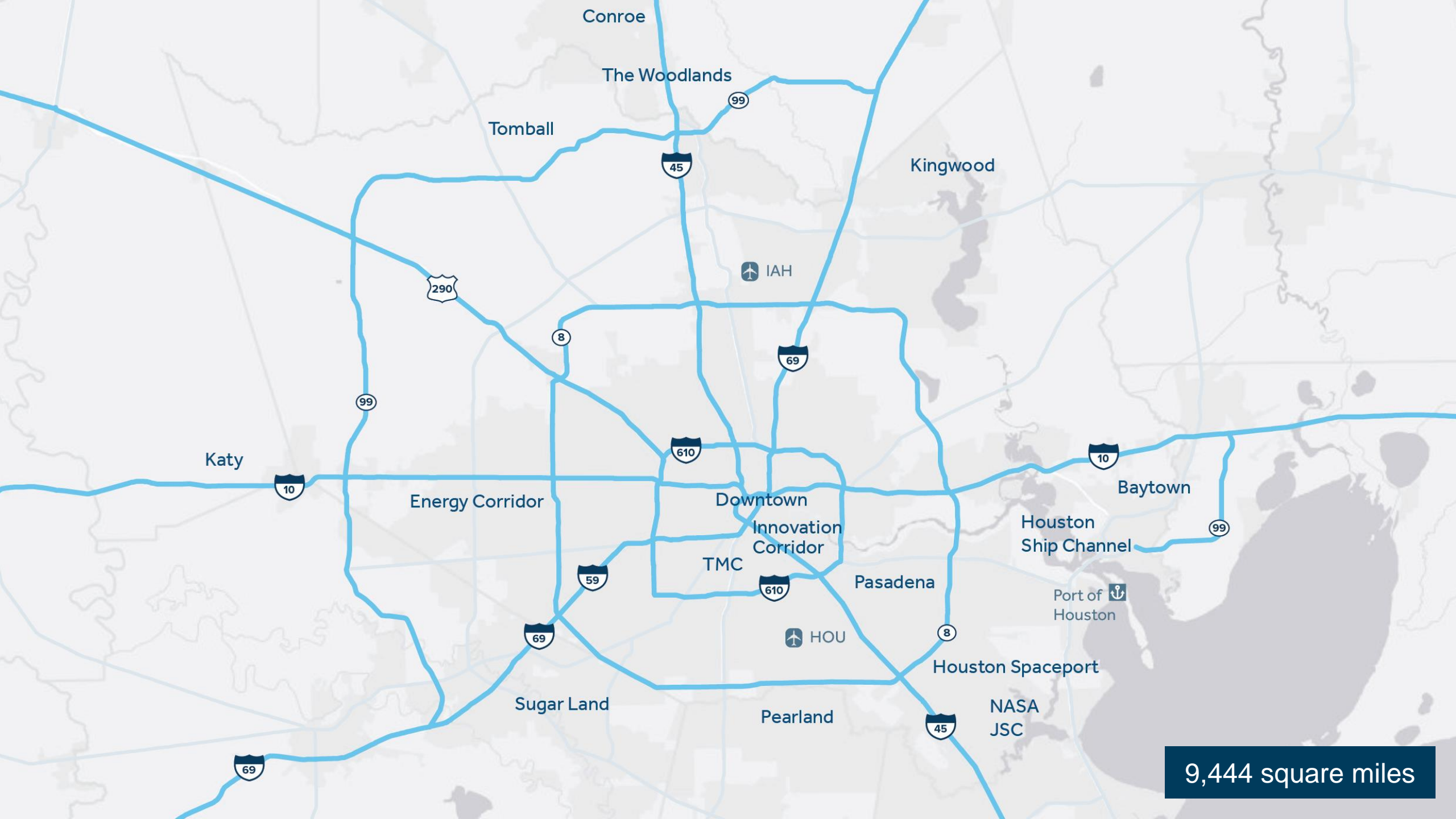
7.2 Million
Metro population

3.0 Million Jobs
(up 15.6% '10-'20)

FASTEST GROWING MAJOR METRO



Fastest rate of population growth among the 10 most populous U.S. metros from '10 to '20



9,444 square miles

AMERICA'S MOST DIVERSE CITY

1 in 4 Houstonians are foreign born

145+ Languages are spoken

8th Largest LGBT population in U.S.

1/3 Population Growth made up of immigrants ('10-'19)



AMERICA'S MOST DIVERSE CITY

Race/Ethnicity: Houston Now (2019) and the U.S. in 2060

Houston MSA, 2019



U.S.A., 2060



Source: U.S. Census Bureau

UNPARALLELED GLOBAL ACCESS



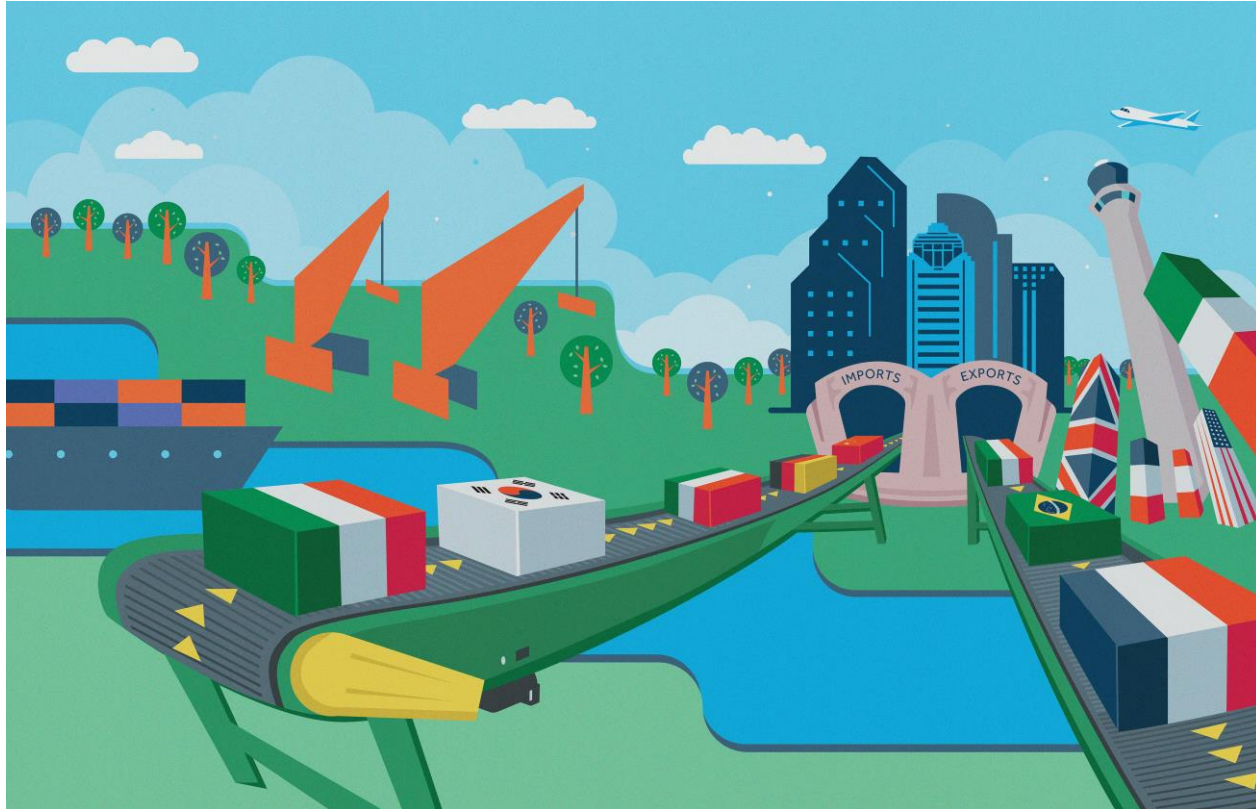
EQUIDISTANT
to east and west coasts

180+ **NON-STOP** destinations from
two international airports

Direct flights to
5 CONTINENTS

37 **Countries** with direct
service from Houston

INTERNATIONAL BUSINESS



5,000+ Houston entities involved in **international business**

150 Houston-based companies operate in **110 foreign nations**

92 **foreign consulates**
3rd largest U.S. concentration

18 **sister-city relationships**
across 5 continents

YOUNG & DIVERSE TALENT

400,000+
educated millennials

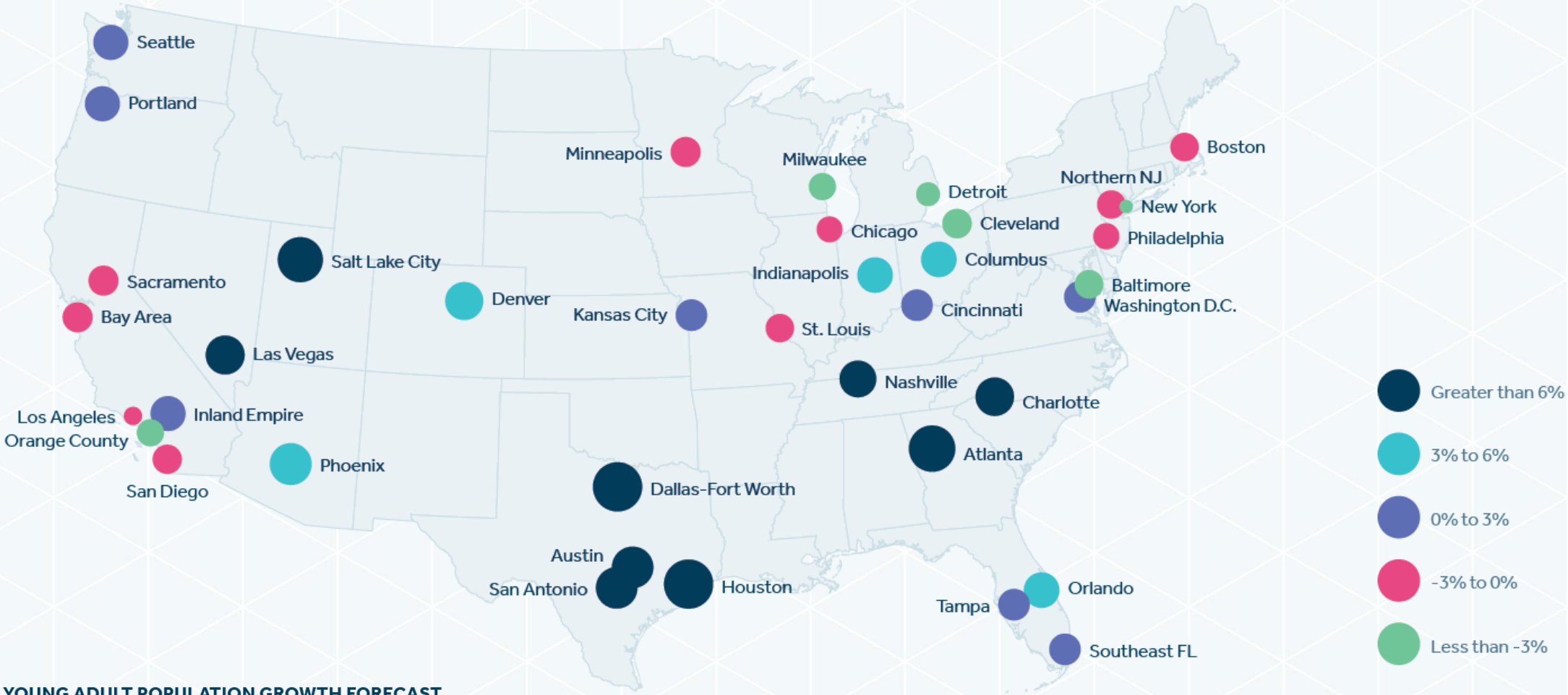
34.9 median Age
youngest major metro

243,900+
employed in tech sector

700,000+
corporate professionals



YOUNG POPULATION GROWTH



5 YEAR YOUNG ADULT POPULATION GROWTH FORECAST
2019-2024

Sources: Marcus & Millichap Research Services, U.S. Census Bureau, Moody's Analytics

TOP UNIVERSITIES & COLLEGES

40+ Universities & Colleges
(two-year and four-year)

417,900+
students enrolled (fall '20)

3 TIER 1
universities



UNIVERSITY of
HOUSTON

TEXAS A&M
UNIVERSITY®

AMONG THE
LARGEST
Community College
systems in the U.S.



UPSKILL HOUSTON

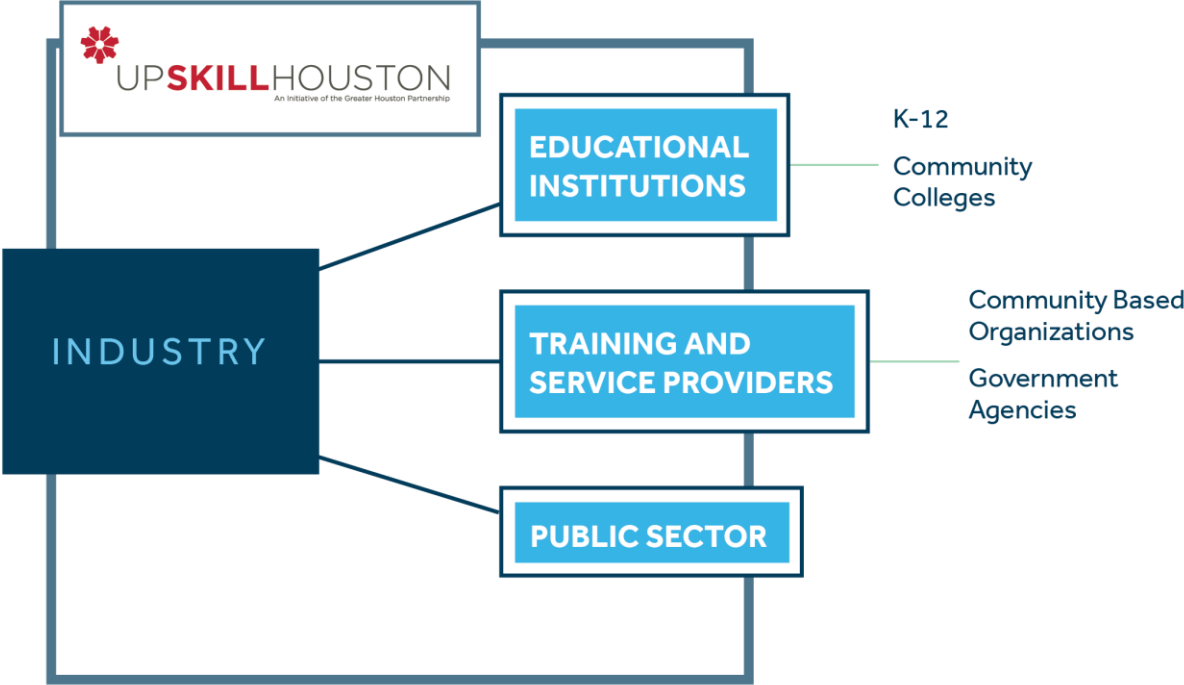
UpSkill Houston is the region’s recognized employer-led initiative that **develops the talent pipeline** to meet the needs of Greater Houston’s economy and its people.

Builds a **cross-sector** collective table

- **130** employers engaged
- **65+** education, community and workforce organizations committed

Fosters **partnerships** among critical leaders

Influences action and **creates impact**



TEXAS 
**PREMIER
BUSINESS
ENVIRONMENT**

#1 **DOING BUSINESS**
CEO Magazine

#1 **NEW & EXPANDED**
corporate facilities
Site Selection Magazine

\$0 personal & corporate
INCOME TAX

FASTEST **POPULATION GROWTH**
GROWING (3.6 million added since 2010)

**HOUSTON
CONSISTENTLY
PRO-GROWTH**

#3 **TOP BUSINESS CITIES**
Hickey & Associates

NO **ZONING LAWS**
City of Houston

#1 **ECONOMIC GROWTH POTENTIAL**
Site Selection Magazine

#11 **TOP 100 U.S. CITIES**
Resonance Consultancy

GREAT PLACE TO LIVE



Among the country's most **EXCITING FOOD CITIES**

10,600+ restaurants | 650 bars | 70 countries

Among the country's most **VISITED & DIVERSE**

cultural centers

The Houston Museum District

Major League **SPORTS TOWN**



World Renowned **PERFORMING ARTS**

theater | dance | music | ballet

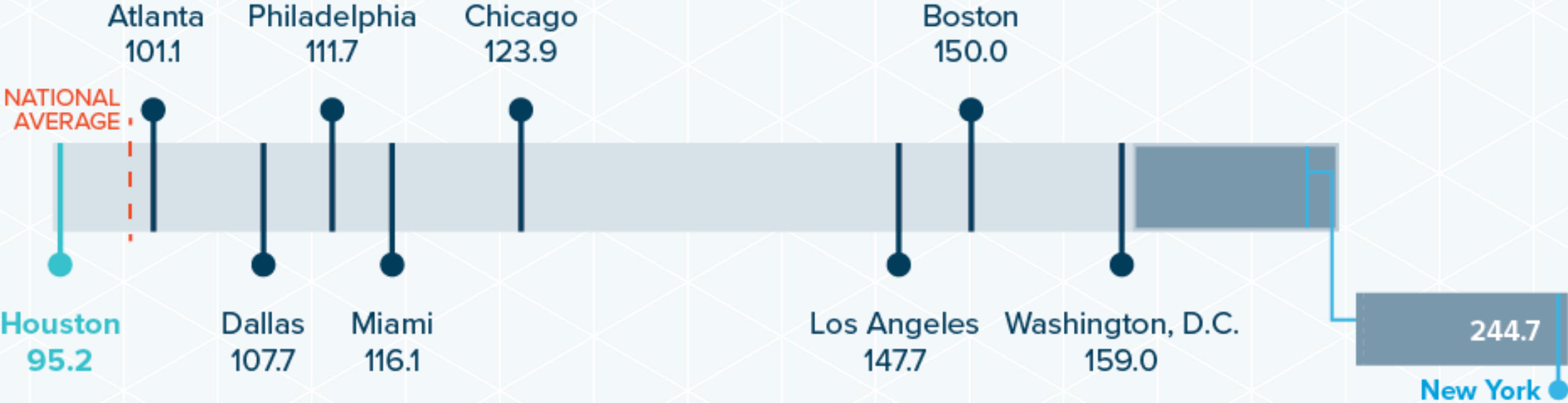
Among the country's **GREENEST CITIES**

500 mi. of bikeways | 627 parks | 167+ green spaces

LOW COST OF LIVING

COST OF LIVING COMPARISON

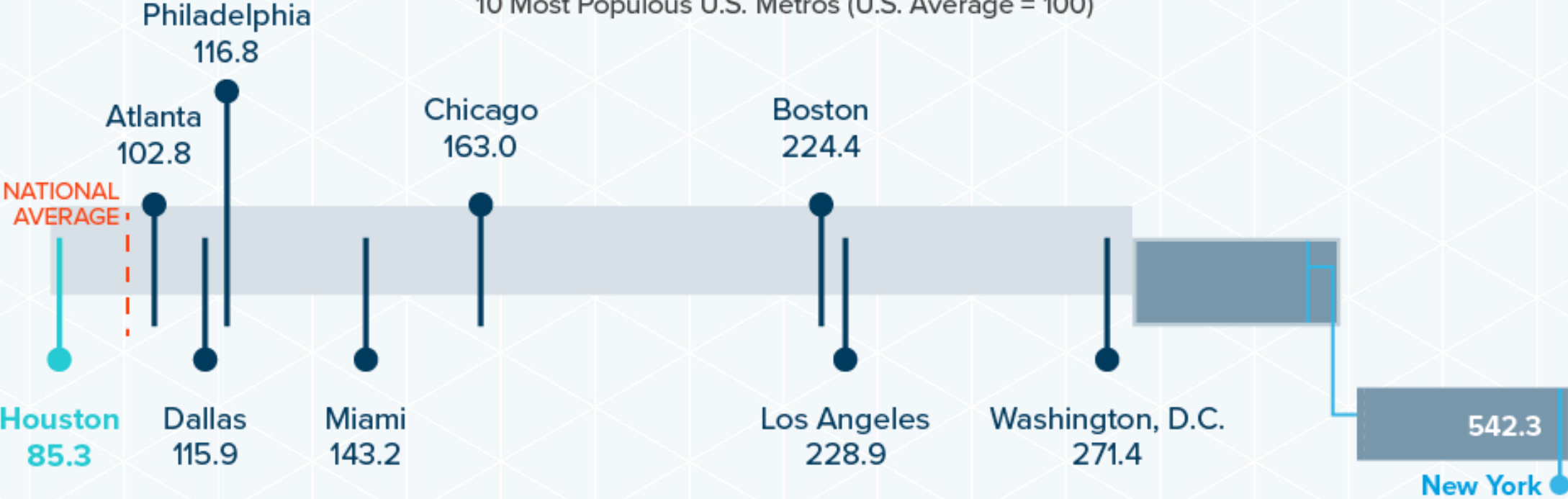
10 Most Populous U.S. Metros (U.S. Average = 100)



LOW COST OF HOUSING

HOUSING COST COMPARISON

10 Most Populous U.S. Metros (U.S. Average = 100)





DIVERSE INDUSTRY MIX

HOUSTON

DIVERSE INDUSTRY SECTORS



Energy 2.0



Life Sciences



Advanced Manufacturing



Logistics & Distribution



Headquarters



Aerospace



Digital Tech

25 **Fortune 500**
Corporate headquarters

39 **Fortune 1000**
Corporate headquarters

6 **Fortune Global 500**
Corporate headquarters

110 **INC 5000**
Corporate headquarters

20 **Forbes Global 2000**
Corporate headquarters

DIVERSE INDUSTRY SECTORS



Energy 2.0



Life Sciences



Aerospace



**Advanced
Manufacturing**



**Distribution &
Logistics**



Headquarters



Digital Tech



ENERGY 2.0

HOUSTON

ENERGY CAPITAL OF THE WORLD



19 Fortune 500
energy corporate headquarters

4,650+ energy firms
located in Houston

227,000+ energy professionals
in the Houston region

1/3 Regional GDP
comes from the Energy sector

50+ SDOs
supporting energy innovation

WHY HOUSTON FOR ENERGY 2.0

Talent &
Expertise

Research &
Development

Capital
Investment

Ability to
Scale

Public Policy

Momentum

LARGE BASE OF CLEAN ENERGY COMPANIES

100+ Solar Related companies



30+ Wind Related companies



80+ Digital Tech in energy

Data Analytics | Remote Sensing | Cloud Processing | AI & ML

COMPARING CLEANTECH HUBS

	HOUSTON	AUSTIN	DALLAS
Universities & Colleges (Tier One)	40 (3)	25 (1)	35 (3)
Students Enrolled	43,000	174,000	345,666
Energy Companies	4,650	120	4,324
Energy Workers	250,000	6,382	83,095
Tech Companies	8,800	7,200	14,966
Tech Workers	235,000	162,000	242,180
Cleantech Companies	210	200	110
Clean Energy Jobs (U.S. Rank)	64,924 (7 th)	26,297 (24 th)	58,554 (9 th)

Source: Greater Houston Partnership Analysis

ENERGY 2.0 STARTUP CAPACITY

80+ TECH COMPANIES
focused on Energy 2.0

50+ SDOs
focused on Energy 2.0

\$3.7 B cleantech VC funding
(since 2015)



Greentown Labs



**Shell
Technology Ventures**

ion

Smart and Resilient Cities Accelerator

MC | MASSCHALLENGE

PLUGANDPLAY
ENERGY & SUSTAINABILITY



**chevron
technology
ventures**



HOUSTON CLIMATE ACTION PLAN

TRANSPORTATION

- Shift regional fleet to electric and low-emission vehicles.
- Reduce vehicle miles traveled (VMT) per capita.
- Provide equitable and safe mobility choices.

ENERGY TRANSITION

- Grow Houston's investment in renewable & resilient energy.
- Become a leader in carbon capture technology & energy innovation.
- Restore, protect, and enhance Houston's natural ability to capture and store carbon.

BUILDING OPTIMIZATION

- Reduce building energy use and maximize savings.
- Expand investment in energy efficiency.
- Invest in skilled local jobs to optimize building operations.

MATERIALS MANAGEMENT

- Reduce waste and transform the circular economy.
- Optimize waste operations and create power from waste.
- Ensure safe and cost-effective long-term disposal capacity.

RECENT ANNOUNCEMENTS



The Welch Institute
Advanced Materials
Rice University



Carbon
Hub



RICE
ALLIANCE

for TECHNOLOGY *and* ENTREPRENEURSHIP

Halliburton  Labs



Greentown Labs



LIFE SCIENCES

HOUSTON

THIRD COAST FOR LIFE SCIENCES

No. 2

Emerging Life Sciences Cluster
(CBRE - *U.S. Life Sciences 2020*)

1,700+

Life Sciences Companies

257,950

**Health & Life Science
Professionals**

\$834M

National Institutes of Health (NIH)
medical research grants ('20)

1,860+

active clinical trials
(20% of all trials in the U.S.)

INDUSTRY PRESENCE

More than **1,700** biotech, life science and/or oncology companies operate in Houston.





CANCER PREVENTION & RESEARCH INSTITUTE OF TEXAS

ABOUT

CPRIT is a \$6 billion, 20-year initiative – the largest state cancer research investment in the history of the United States and the second largest cancer research and prevention program in the world.

PURPOSE

Funds a wide variety of innovative cancer-related research and product development and for the delivery of evidence-based cancer prevention programs and services by public and private entities located in Texas.

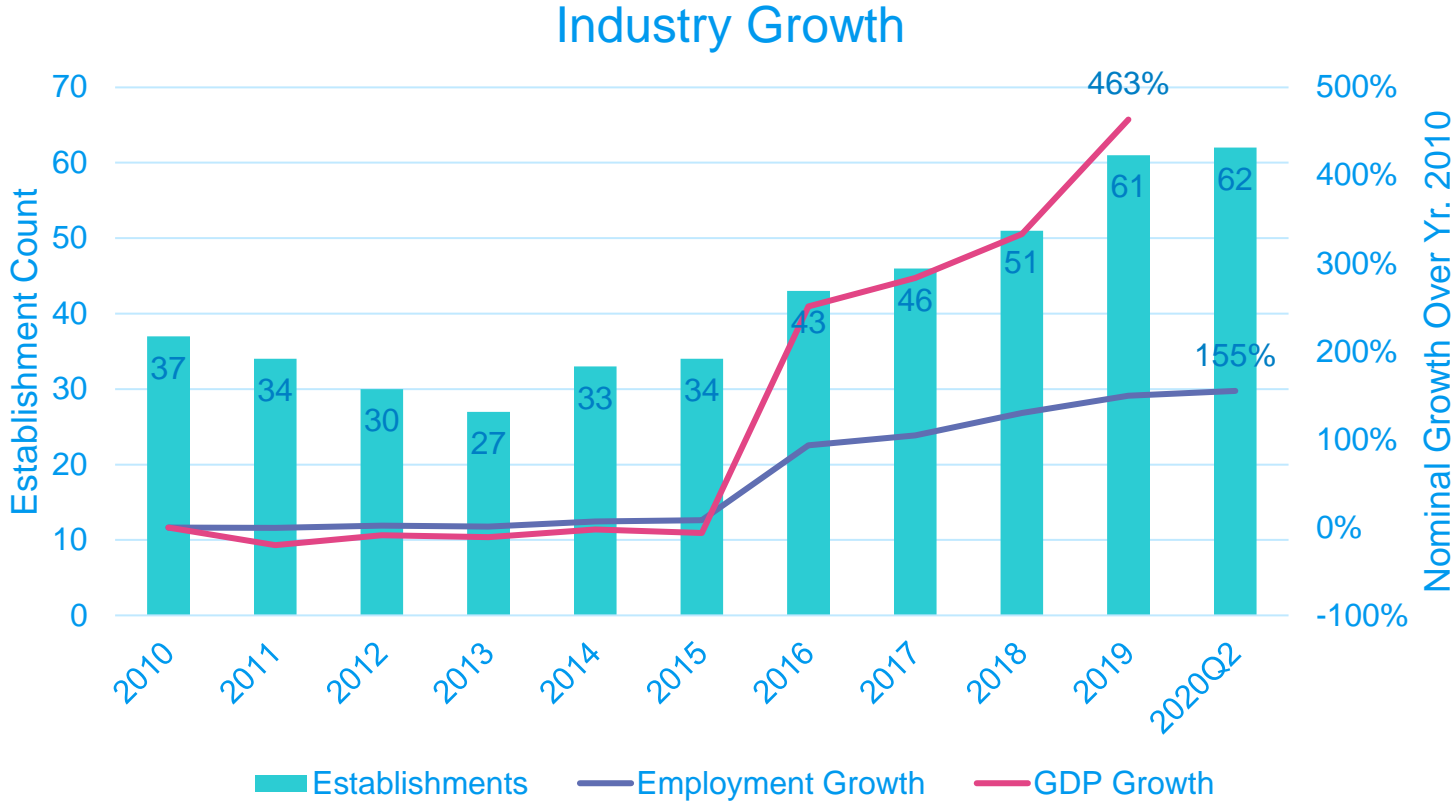
GRANTS FUNDED

- 1,576 awards since 2010.
- \$2,641,125,485 total amount awarded

2021 PROGRAM PRIORITIES

- Prevention and Early Detection Initiatives
- Early Translational Research
- Enhance Texas' Research Capacity and Life Science Infrastructure

LIFE SCIENCE INDUSTRY GROWTH IN HOUSTON ('10 – '20)

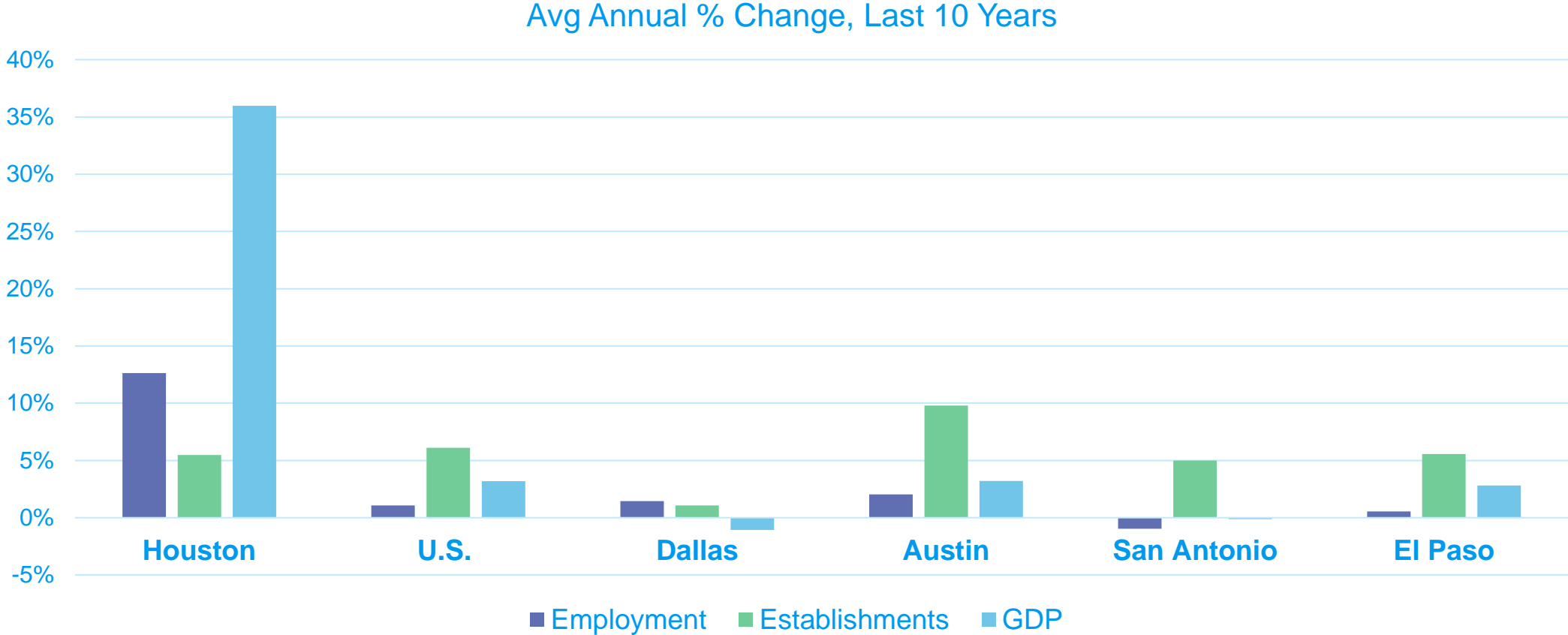


50% Establishment Growth

150% Employment Growth

~500% GDP Growth

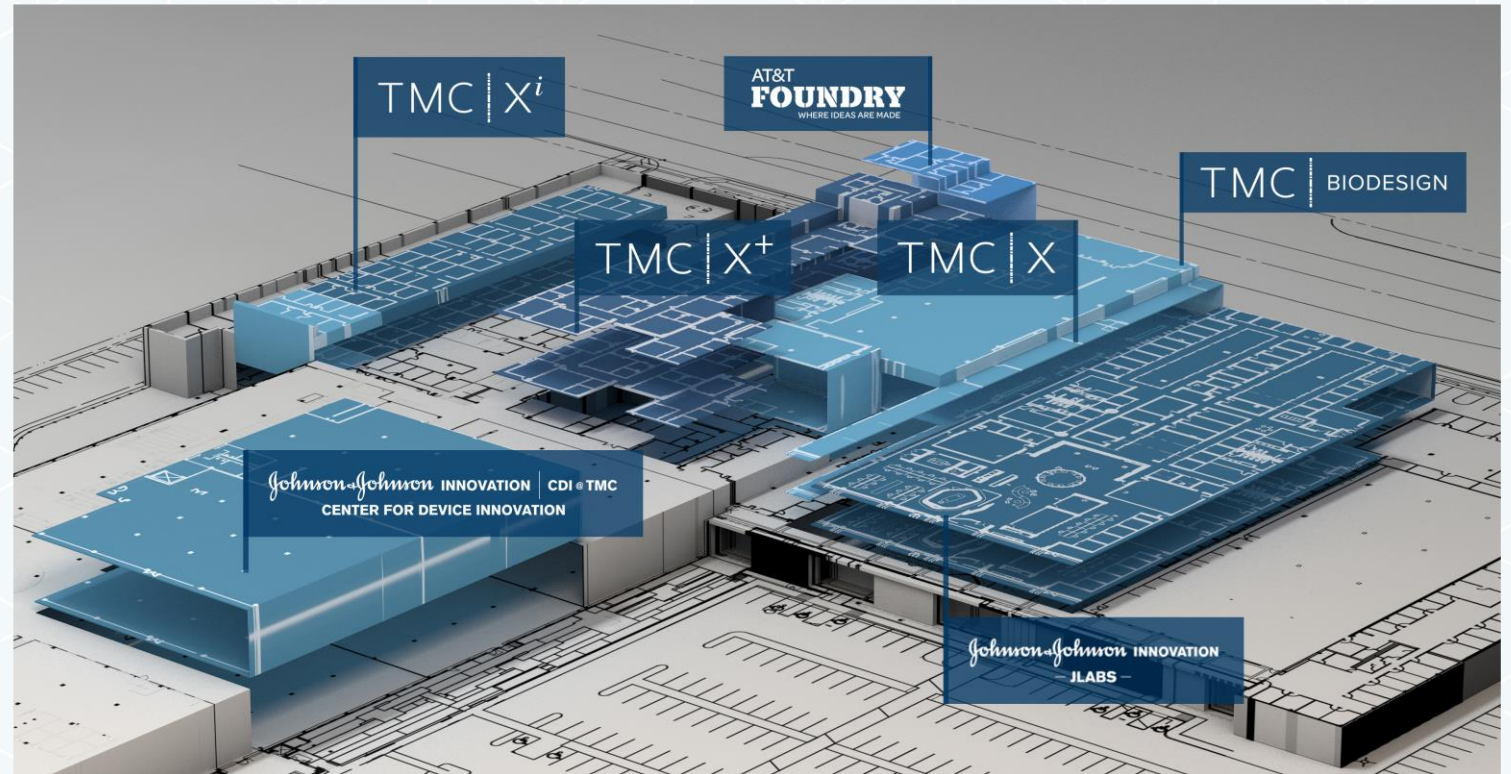
LIFE SCIENCE INDUSTRY GROWTH COMPARISON



Source: GHP calculations using data from JobsEQ

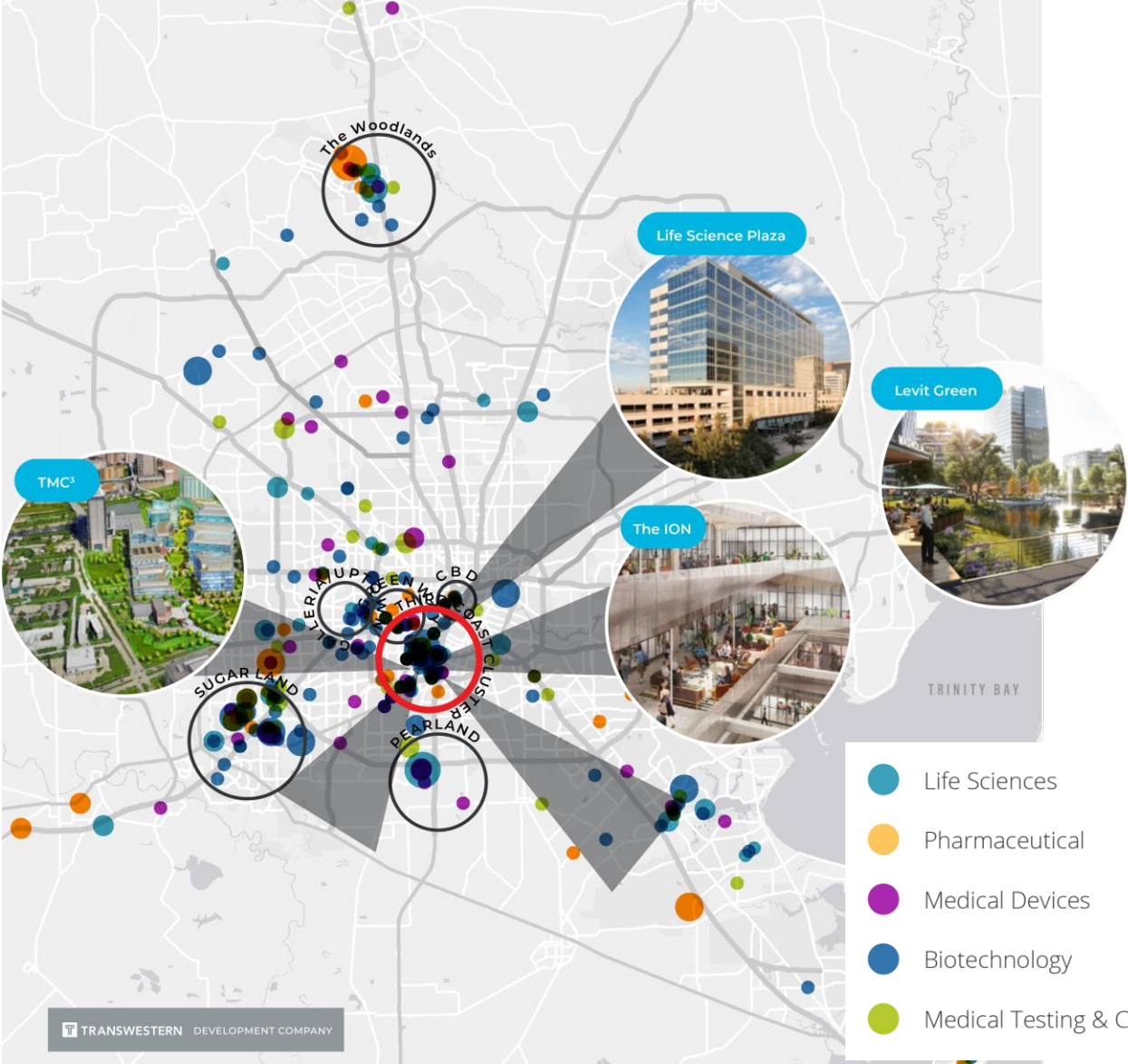
TMC

TEXAS
MEDICAL
CENTER



The Texas Medical Center's **Innovation Institute** features over 200K square feet of accelerator and incubator space aimed to help startup companies commercialize new medical technologies

HOUSTON LIFE SCIENCES HUBS



7.1 MSF Cumulative Life Science Footprint

TMC

TEXAS
MEDICAL
CENTER

Texas Medical Center, the world's largest, is at the forefront of advancing life sciences through cross-institutional collaboration, creativity and innovation.



LIFE SCIENCE DEVELOPMENTS



Texas Medical Center's **TMC3** is a multi-institutional 37-acre research campus that brings together the best institutions in clinical care, research and industry.



Levit Green is a 52-acre site that is slated to include a mix of office space, research facilities, retail, residential and green space.



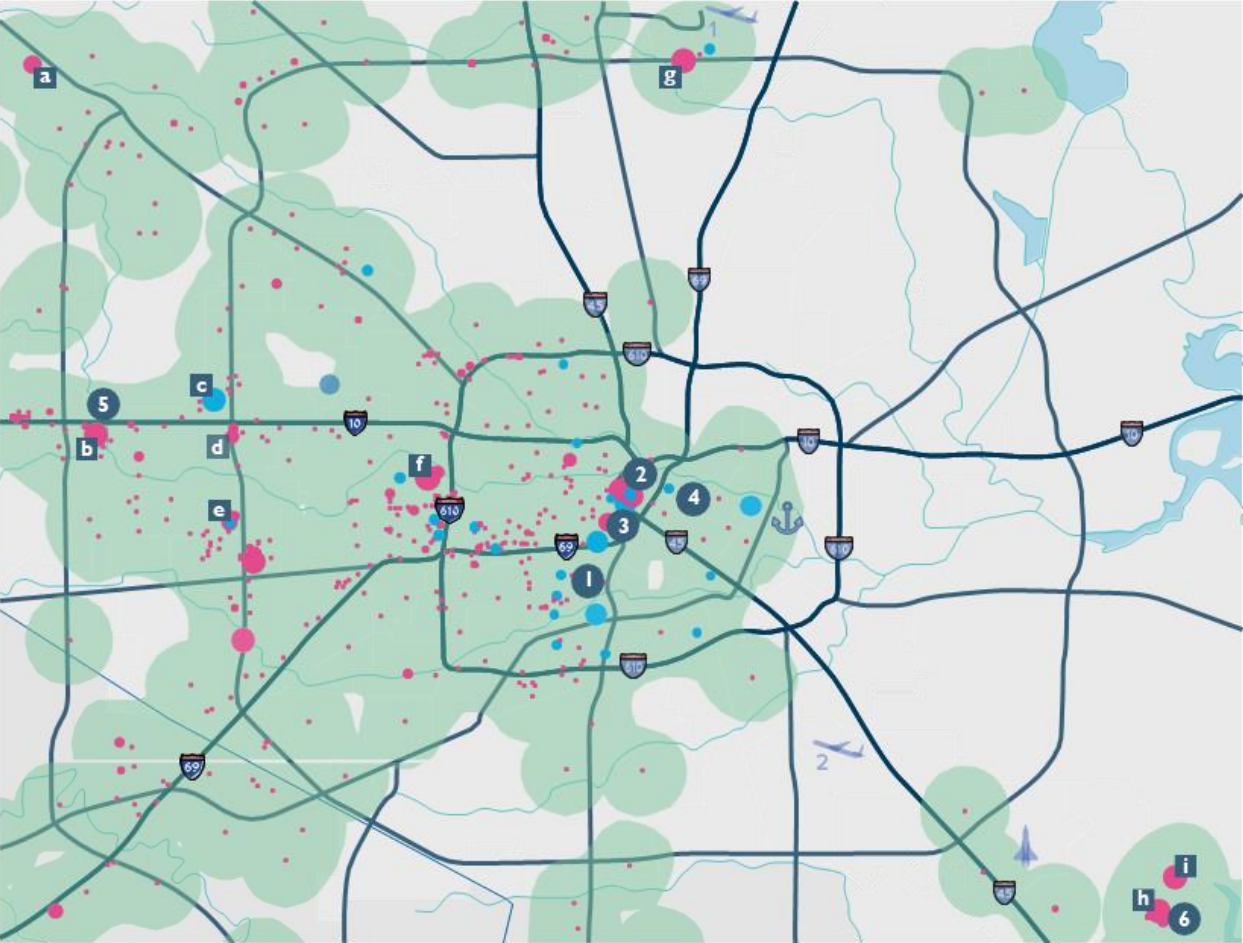
Texas A&M Innovation Plaza is a \$550 million, 5-acre, mixed-use complex that includes education space for medicine and engineering, student housing and commercial space for clinical, research and office use.



DIGITAL TECH

HOUSTON

HOUSTON'S TECH ECONOMY



243,900 tech professionals
(11th in the US)

\$2.02 B total VC in '21
(record high for the region)

\$29.2 B economic impact
(5.8% of GDP)

800+ venture-backed
tech startups

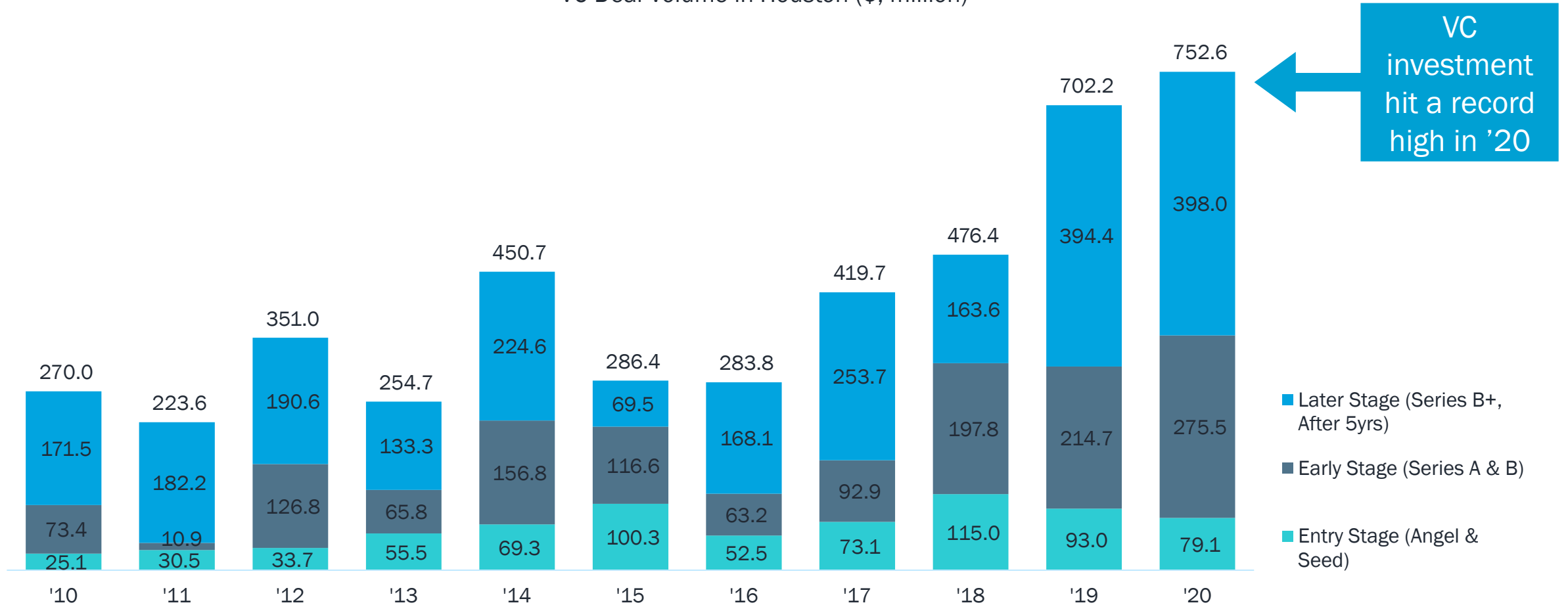
HOUSTON'S TECH ECONOMY

The Houston region is home to **9,290 tech-related firms**, including **1 Fortune 500 HQ**.



VENTURE CAPITAL INVESTMENT

VC Deal Volume in Houston (\$, million)



VC investment hit a record high in '20

Source: Partnership Analysis of PitchBook Data
Updated: 3/1/2021

HOUSTON'S TECH SPECIALTIES

Top Tech Verticals

Frequency per 100 VC Deals

Verticals	US	Houston	Austin	Dallas
Life Science	9.8	17.7	3.8	5.7
Oil & Gas	0.9	17.0	1.3	2.5
Software-as-a-Service	22.3	13.5	25.5	25.4
Industrials	7.8	13.2	8.6	7.8
Oncology	3.4	11.1	1.5	2.7
<u>CleanTech</u>	5.0	11.1	5.0	3.8
Mobile	17.7	9.6	18.6	19.6
Manufacturing	7.3	9.1	6.2	8.5
AI & Machine Learning	8.0	7.3	8.2	5.9

Source: Partnership Analysis of PitchBook data

Notes: One deal may have multiple verticals, so cols don't sum.

Excludes TMT (Tech, Media, Telecom), a catch-all vertical.

RECENT TECH EXPANSIONS



**Hewlett Packard
Enterprise**

Google

aws

 **Avetta**

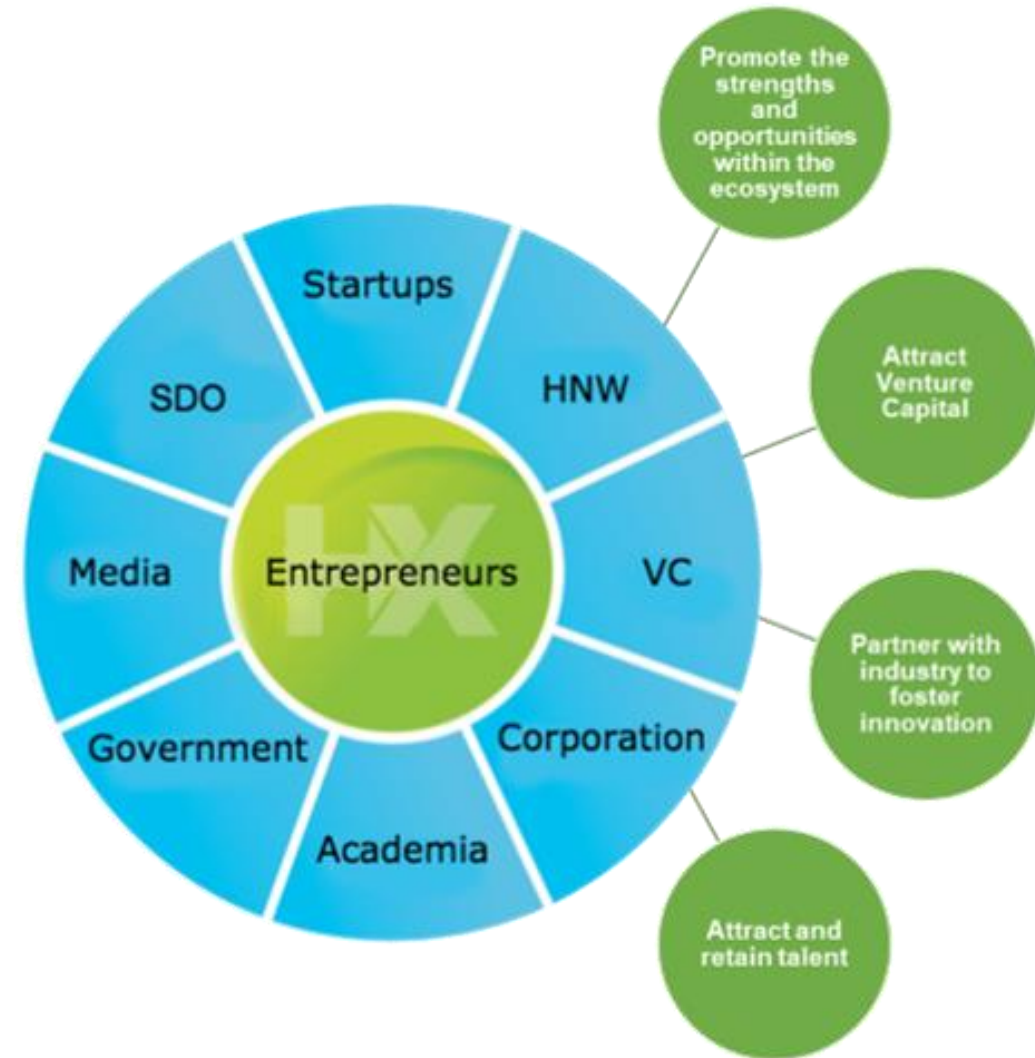
 **Microsoft**

bill.com

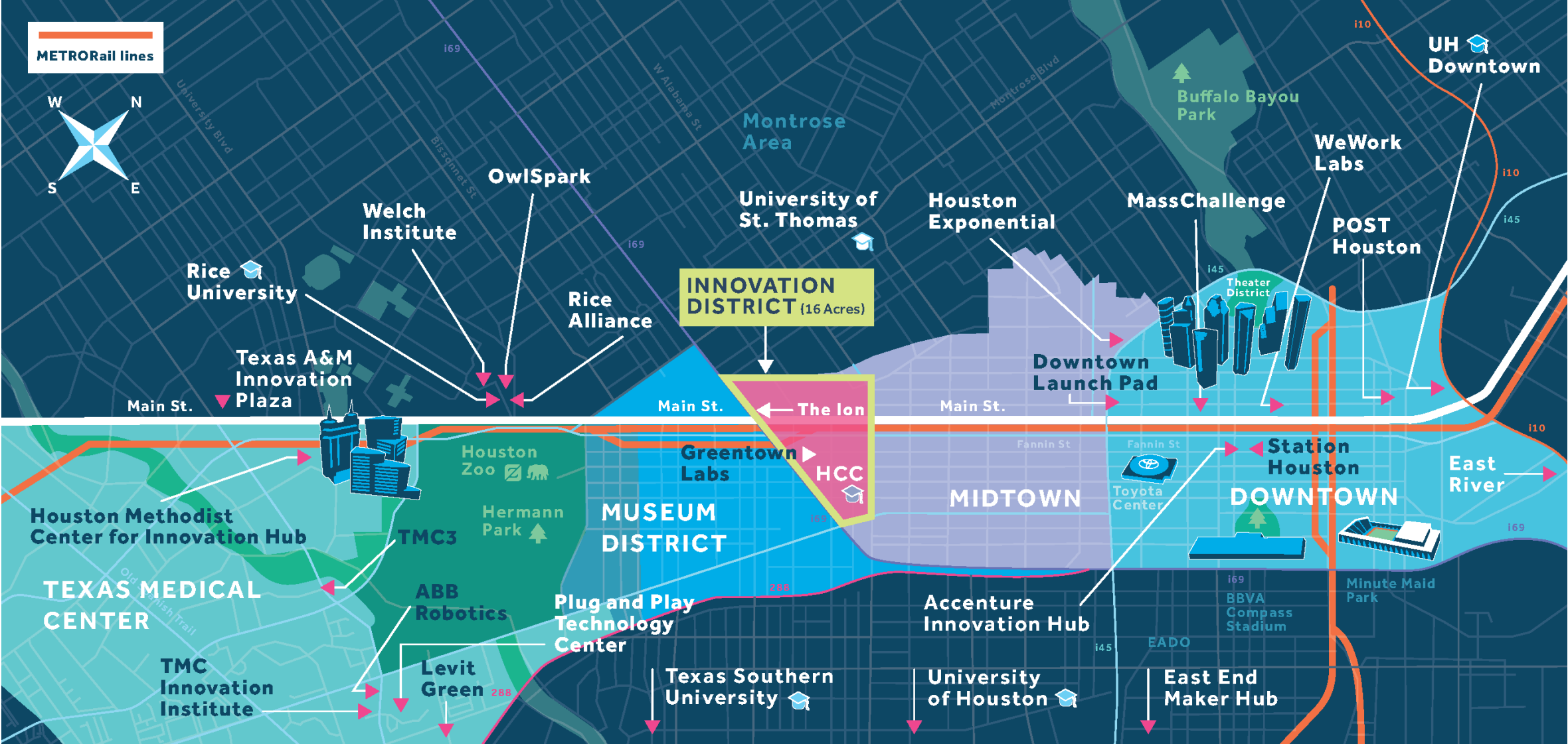
Honeywell

 **classpass**

GROW TECH PRESENCE BY 2022



HOUSTON INNOVATION CORRIDOR



THE ION

The 266,000-square foot centerpiece of Houston's Innovation District is designed to bring entrepreneurial, corporate, and academic communities together into collaborative spaces and programs. Opening Fall 2021





AEROSPACE

HOUSTON



NASA's Johnson Space Center is at the cutting edge of advanced technologies, helping to develop the science that will one day send humans into deep space, and here on earth, advancing our understanding of health and the human body.

JOHNSON SPACE CENTER

AMONG NASA'S LARGEST R&D FACILITIES

\$1.5 billion facility | 1,620 acres

\$8.7 B Economic output
(‘20)

\$5.56 B ‘20 JSC
Annual Budget

11,800+ employees

\$2.3 B in NASA contracts to
Houston companies

AEROSPACE AND AVIATION

350+ aerospace & aviation
companies and institutions

15,000 aerospace manufacturing
professionals





HOUSTON SPACEPORT



Launch and landing site for **suborbital, reusable launch vehicles.**



ADVANCED MANUFACTURING

HOUSTON

A MANUFACTURING POWERHOUSE

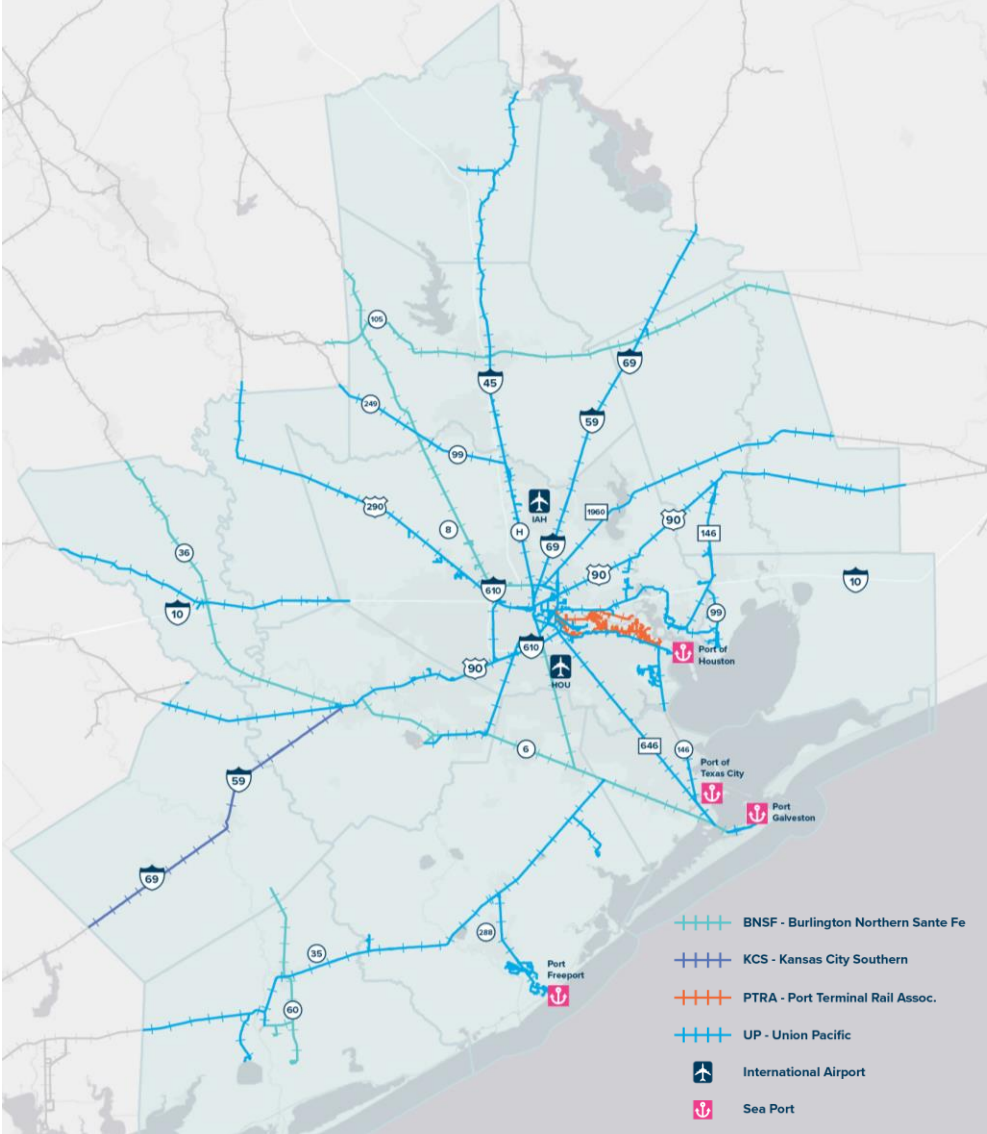
6,700+ manufacturing establishments
in the Houston region

223,000+ employed in manufacturing
(one of the largest in the U.S.)

\$86 B
in goods produced annually ('20)

DIVERSE MARKETS
aerospace | automotive | biotechnology | energy
equipment controls | instrumentation

WORLD-CLASS INFRASTRUCTURE



#1 U.S. PORT
Port of Houston

230.1 M Metric tons of trade
Houston region seaports (2020)

2 INTERNATIONAL AIRPORTS
only Texas city | 1 of 8 cities nationwide

128,592+ Metric tons of airborne trade
Houston-area airports (2019)

TRADE AND LOGISTICS HUB

5,100+ transportation & warehousing establishments

149,000+ logistics workers transportation & warehousing

1,000+ logistics service providers, customs brokers and 3PLs

GROWING BASE
distribution-logistics centers

EQUIDISTANT TO EAST AND WEST COAST





GREATER HOUSTON **PARTNERSHIP**

Making Houston Greater.

Real Estate

Initiate property searches

Site Tours

Coordinate site selection visits, regional briefings

Research

Provide data on key business and site factors

Access

Direct access to top business and civic leaders

Permits

Advocacy for projects and regulatory issues

Incentives

Assist in evaluating and applying for benefits

Susan Davenport
Chief Economic Development Officer

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(713-844-3612)



GREATER HOUSTON
PARTNERSHIP

Making Houston Greater.

