

About Houston





The City of Houston

Nation's **7th largest** metro economy.

World's **26th largest** economy by GDP.

Houston has grown by **\$109.8 billion** over the past decade. ('07-'17)

442,700 jobs created in the last 10 years. ('08-'18)

Gulf Coast Region employment projected to grow to **3.8 million** by 2026

Home to the **World's Largest Medical Center**



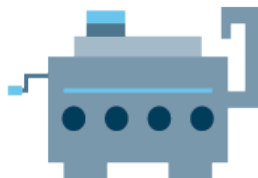
Energy Capital of the World



Third Coast for Life Sciences



Growing Innovation Ecosystem



Manufacturing Powerhouse



Top Headquarters City



Trade and Logistics Hub for the Americas



Houston's Momentum

By the Numbers

- City of Houston population over 2.3 million (ACS 2018)
- The Houston metro region offers a diverse and extensive labor force of more than three million workers, larger than 35 states.
- Houston ranks 21st among U.S. metros for venture capital deals

By the Assets

- Central U.S. location with two international airports and four major deep-water seaports
- 3rd highest concentration of Fortune 1,000 headquarters
- Home to more than 40 Fortune 1,000 corporate headquarters

By the Opportunity Zones

- Harris County contains 105 opportunity zones, over 16% of the zones designated in Texas
- Zones include transformational projects throughout the city

Houston By the Numbers





Fastest Growing Consumer Market in U.S.

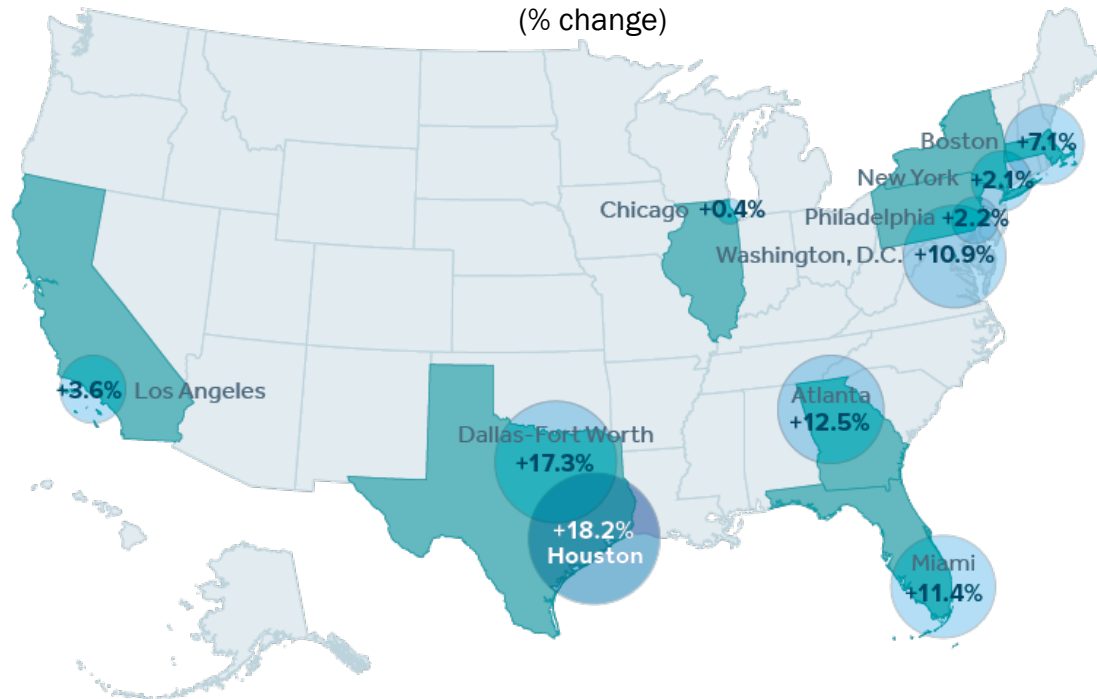
Houston is one of the youngest, fastest-growing and most diverse populations anywhere in the world.

Fastest rate of population growth among the top 20 U.S. Metros from '10 to '18

Houston's per capita **personal income** in '17 was **2.2% above the U.S. average.**

Population Growth 2010 – 2018

(% change)





America's Most Diverse City

145 languages spoken in Houston

39.8% of Houstonians speak a language other than English

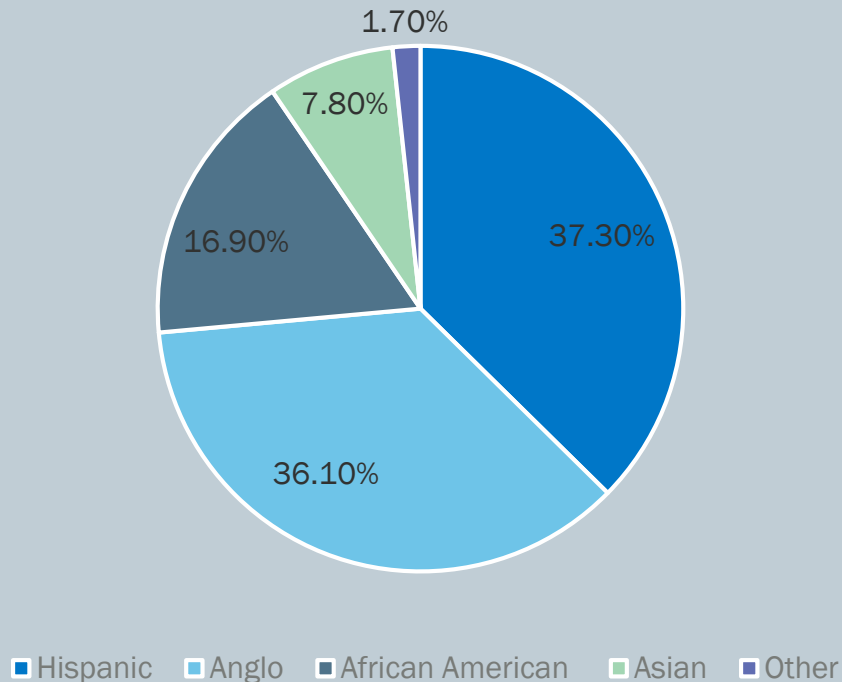
23.6% of Houstonians are foreign born.

Home to over 1,000,000 millennials, consisting of 15.0% of the population in '18

Top 10 city for attracting millennials

Top city for retaining college graduates.

Race/Ethnicity: City of Houston





Houston is Business and Wallet Friendly

Consistently **pro-growth**,
pro-business attitude.

Houston and Texas have **no state**
or corporate income taxes.

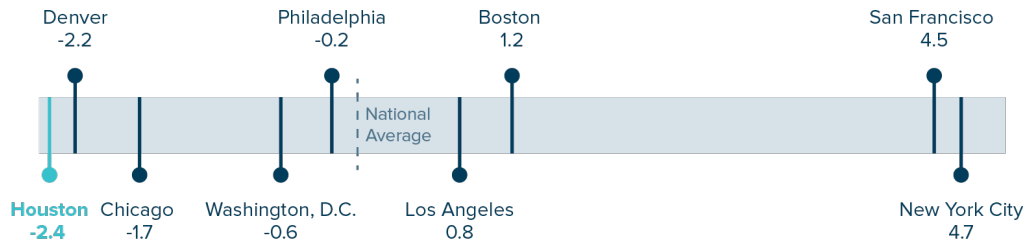
Texas is a **right-to-work state** with
one of the country's lowest
unionization rates.

Lower **cost for development** due
to proximity to raw materials,
suppliers, global air and
seaports.

No zoning laws allow for quality
development to take place
without undue requirements.

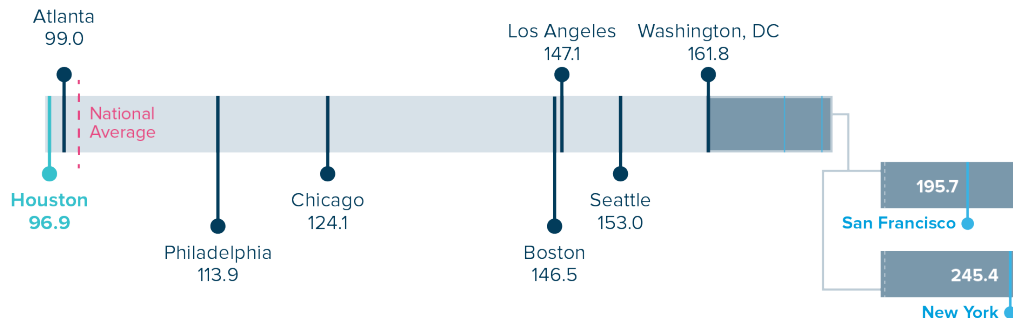
OVERALL BUSINESS COST INDEX

Percent Above/Below the U.S. Average Cost



COST OF LIVING COMPARISON

Cost of Living Index (U.S. Average = 100), Q1/18





Consistently Among the Best Cities

**America's Top State
for Business**

CNBC - 2018

**#3 Fastest Growing City in
the U.S.**

Wallet Hub

**#5 Metro in U.S.
Forbes Global 2000
Headquarters**

Forbes

**No. 2 Metro
Business Relocations
& Expansions**

Site Selection Magazine

**Top 10 Metro
America's Best Cities**

Resonance Place Equity Index

**#1 Metro for Economic
Growth Potential**

Business Facilities



Houston Employment Profile

City of Houston Employment by Industry 2017

Industry	Jobs	Percent of Total
Total Nonfarm	1,105,198	100.0
Agriculture, Forestry, Fishing and Hunting	2,207	0.2%
Mining and Logging	29,867	2.7%
Construction	117,617	10.6%
Manufacturing	91,529	8.3%
Wholesale Trade	30,195	2.7%
Retail Trade	112,623	10.2%
Trade, Transportation, and Utilities	66,607	6.0%
Information	12,530	1.1%
Financial Activities	67,743	6.1%
Professional and Business Services	162,251	14.7%
Educational and Health Services	207,555	18.8%
Leisure and Hospitality	109,196	9.9%
Other Services	65,944	6.0%
Government	29,334	2.7%

Source: U.S. Census Bureau, 2017 American Community Survey



Houston's Largest Employers

The top 100 employers in Houston account for nearly 600,000 regional workers.

More than 20,000 employees

H-E-B

Houston Methodist

Memorial Hermann Health System

UT MD Anderson Cancer Center

Walmart

10,000 to 19,999 employees

ExxonMobil

HCA

Kroger

National Oilwell Varco

Schlumberger

Shell Oil Co.

Texas Children's Hospital HCA

United Airlines

UT Medical Branch Health System

5,000 to 9,999 employees

AT&T

Baker Hughes, a GE company

Baylor College of Medicine

BP America

CenterPoint Energy

Chevron

CHI St. Luke's Health

Dow Chemical Co.

Halliburton

Harris Health System

Hewlett Packard Enterprise

Home Depot

Houston Community College

JPMorgan Chase

KBR

Lone Star College

Michael E. DeBakey VA Medical Center

S&B Engineers and Constructors

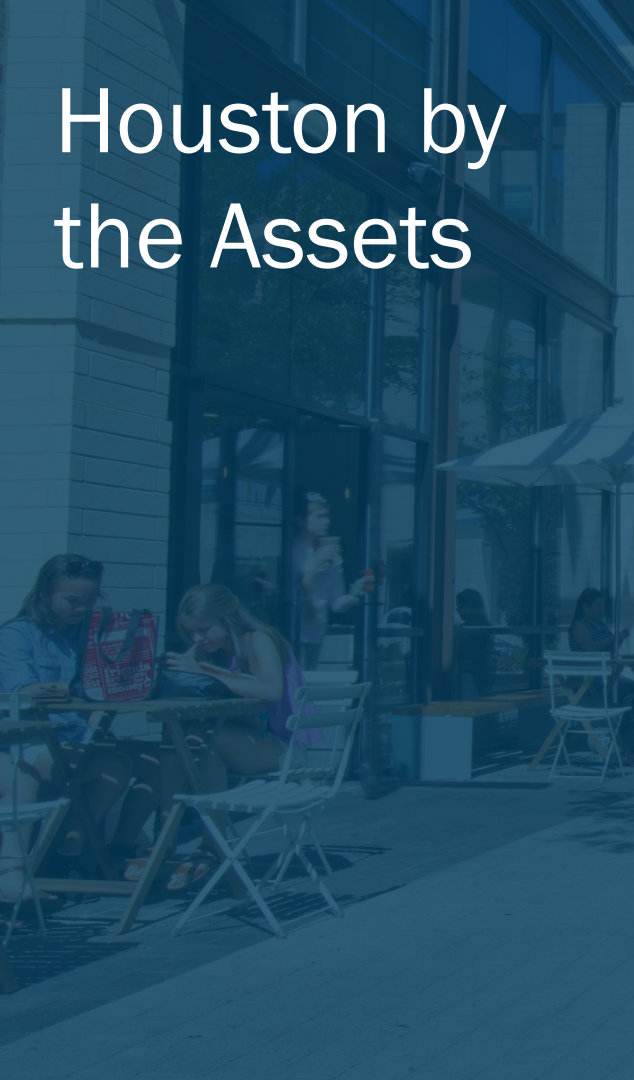
Target Corp.

University of Houston

UT Health Science Center at Houston

Walgreens

Houston by the Assets





Headquarters Hub for the Americas

Corporate headquarters thrive in our region, powered by a diverse, highly-skilled and well-trained talent base who enjoy an excellent quality of life.

Houston has one of the **largest concentrations of global headquarters in the world.**

3rd highest concentration of **Fortune 1,000 headquarters** in the U.S. (ranking just behind New York and Chicago).

Home to more than **20 Fortune Global 2,000 companies'** global or regional headquarters.





Houston is a Great Global City

1,700+ Houston firms report foreign ownership.

90 consulate offices.

More than 150 companies with nearly 3,500 subsidiaries in 110 other nations.

5,000+ Houston-area firms, foreign government offices and nonprofit organizations involved in international business.

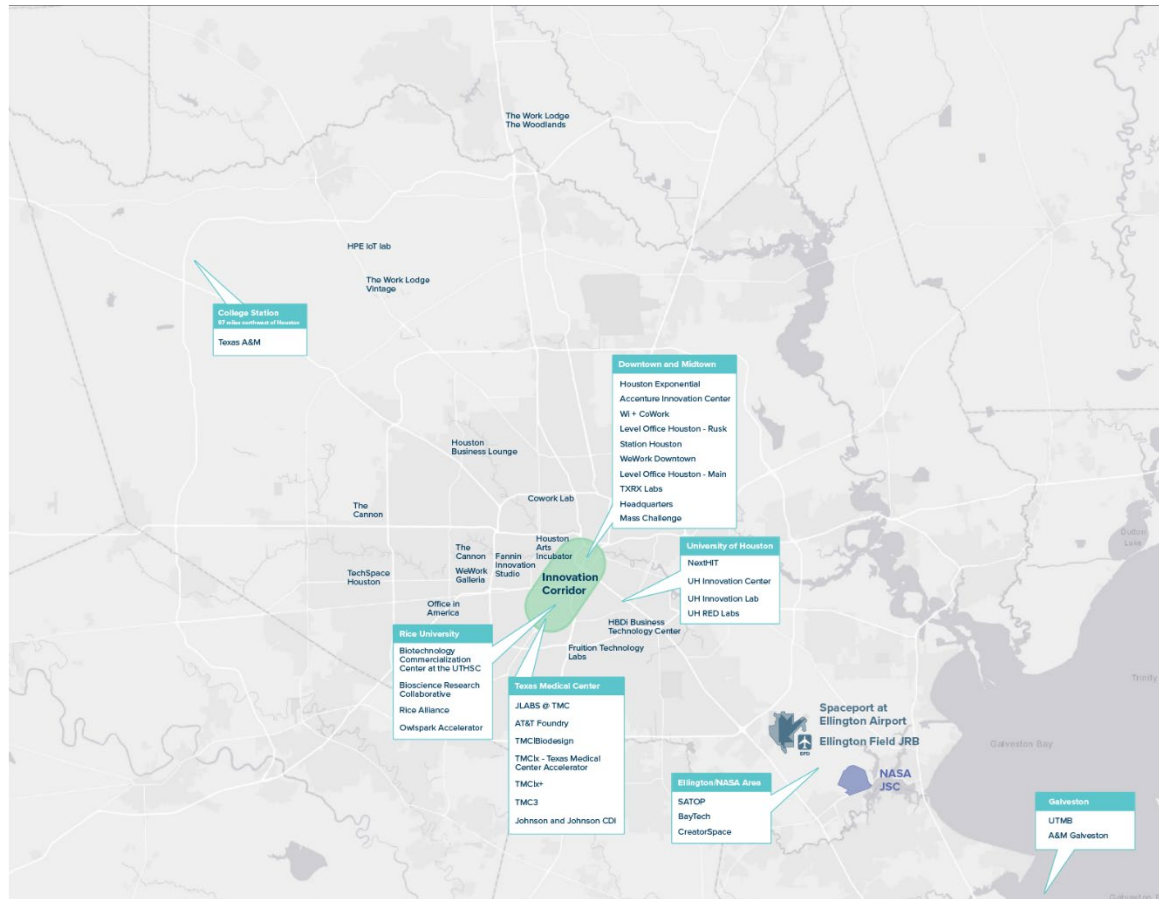
19 foreign banks, representing ten nations.

Hundreds of international companies have opened, expanded or relocated to Houston.





Houston's Innovation Ecosystem





Houston's Innovation Ecosystem

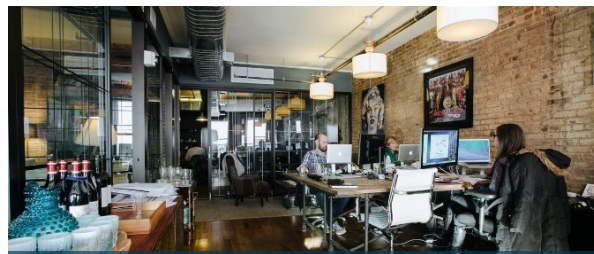
Over the last few years, Houston has made transformational moves to accelerate the growth of our innovation ecosystem, positioning Houston as a world class digital tech city over the next five years.



INNOVATION CORRIDOR



THE ION



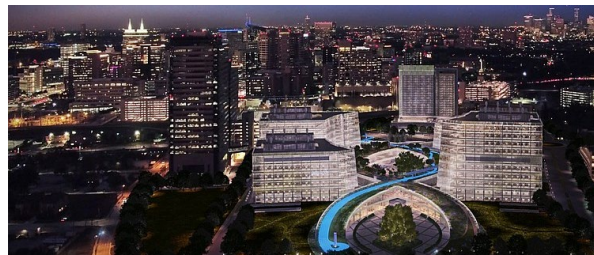
COLLABORATION SPACES



HOUSTON EXPONENTIAL



TMC x



TMC3 - TRANSLATIONAL RESEARCH CAMPUS



Third Coast for Life Science

Home to the world's largest medical campus, the **Texas Medical Center**, one of the top destinations in the U.S. for clinical health care and medical research.

10+ million patient encounters at TMC each year.

106,000 employees including multiple **Nobel Laureates** and the highest concentration of **nationally awarded scientists**.

Houston has more than **1,760 life sciences companies**, cutting edge hospitals, health facilities and research institutions.





Digital Tech in Houston

Houston has a over 500 digital tech companies developing new and innovative technology for energy, healthcare, business services, e-commerce, cloud-computing, cyber-security, logistics and other vital industries.





Manufacturing Market in Houston



Houston is a **leading global manufacturing center** and **logistics hub for the Americas and the world**.

Houston has the **fourth largest manufacturing GDP** in the U.S.

Houston manufactures **\$83 billion in products annually**.

The labor shed for the Houston region includes **more than 529,200 workers in goods-producing industries**.

Houston manufacturers employ more than **229,000 manufacturing workers**.



Strategic Location for Global Access by Air

Houston provides direct access to every major city in the U.S. from two airports – Bush Intercontinental (IAH) and Hobby (HOU).

845 daily nonstop flights globally

Atlanta	1:50 hrs.	New Orleans	1:00 hrs.
Boston	3:40 hrs.	New York City	3:20 hrs.
Chicago	2:25 hrs.	Philadelphia	3:10 hrs.
Cleveland	2:35 hrs.	Phoenix	2:40 hrs.
Dallas/Ft. Worth	30 min.	San Diego	3:20 hrs.
Denver	2:20 hrs.	San Francisco	4:10 hrs.
Los Angeles	3:30 hrs.	Seattle	4:30 hrs.
Miami	2:20 hrs.	Washington, D.C.	2:50 hrs.





Houston Region's Ports Offer Global Access

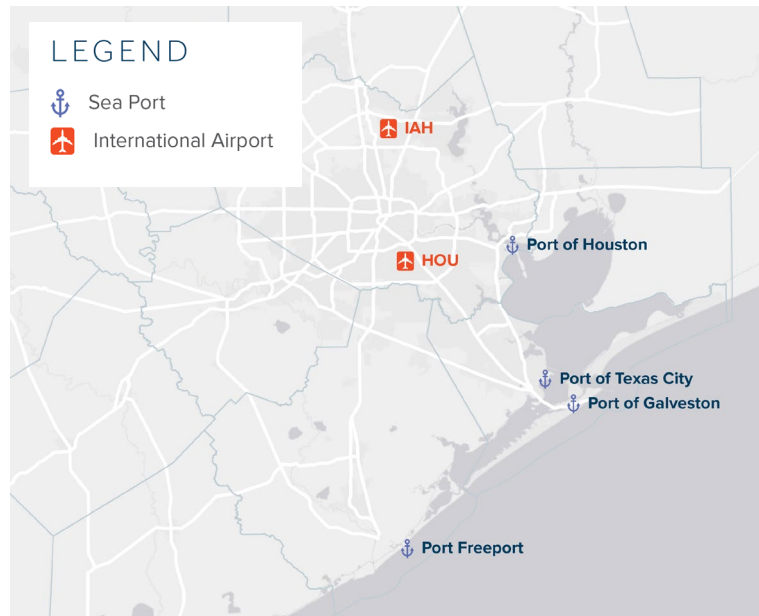
Four major deep water seaports enable companies to import goods from around the world. Efficiently linked by rail, interstate and local roadways, Houston's ports are an unparalleled gateway to global shipping lanes.

Port Houston is the largest **container** in the Gulf Coast and **5th largest** in the U.S., amounting to **over 247 million tons of cargo**

#1 import and export (combined) port in the U.S. in terms of foreign waterborne tonnage

#1 break bulk port in the nation, accounting for 52% of project cargo, break bulk and neo-bulk at Gulf Coast ports.

Each year, more than **8,200 vessels** and **215,000 barges** carry throughout the Port of Houston





Easy Access to Major Interstates

Houston's extensive highway system is well-integrated with the ports, airports, and railroads serving the city.

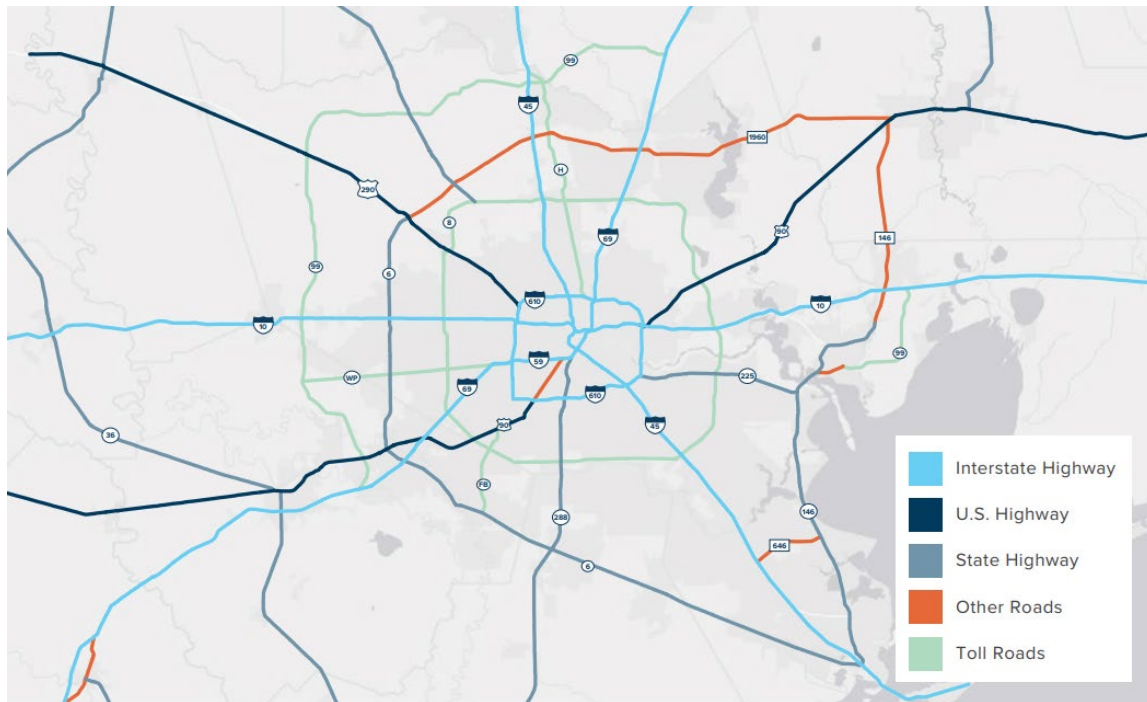
Crossroads of Interstate Highways

10, 45, and 69.

I-69 is known as the **"NAFTA superhighway"** that will link Canada, the U.S. Industrial Midwest, Texas, and Mexico.

"Three-loop system"

enabling easy connections across the region including Interstate 610, Beltway 8 and Highway 99.



Houston Has Talent





Extensive Talent Pool

With a labor pool of over 3 million workers, businesses thrive in our region, powered by a diverse, highly-skilled and well-trained talent base from all sectors.

HQ & Business Services — 700,000 corporate professionals

Digital Tech Talent – 233,000 jobs

Engineers – 55,870 jobs

Biotech Specialist – 16,880 jobs

Health Care — 332,700 jobs

Manufacturing – 229,000 jobs





Colleges in the City of Houston – 2 Year

ALTIERUS CAREER COLLEGE-BISSONNET	Private not-for-profit	FORTIS INSTITUTE-HOUSTON	Private for-profit		
AVIATION INSTITUTE OF MAINTENANCE-HOUSTON	Private for-profit	HOUSTON COMMUNITY COLLEGE	Public	SAN JACINTO COLLEGE-SOUTH CAMPUS	Public
CENTER FOR ADVANCED LEGAL STUDIES	Private for-profit	HOUSTON INTERNATIONAL COLLEGE	Private for-profit	SCHOOL OF AUTOMOTIVE MACHINISTS & TECHNOLOGY	Private for-profit
COMMONWEALTH INSTITUTE OF FUNERAL SERVICE	Private not-for-profit	CARDIOTECH ULTRASOUND SCHOOL		THE COLLEGE OF HEALTH CARE PROFESSIONS-SOUTHWEST HOUSTON	Private for-profit
CULINARY INSTITUTE INC	Private for-profit	INTERACTIVE COLLEGE OF TECHNOLOGY	Private for-profit	UNIVERSAL TECHNICAL INSTITUTE OF TEXAS INC.	Private for-profit
FLORIDA CAREER COLLEGE-HOUSTON CAMPUS	Private for-profit	LONE STAR COLLEGE	Public	VET TECH INSTITUTE OF HOUSTON	Private for-profit
FORTIS COLLEGE-HOUSTON	Private for-profit	MEDIATECH INSTITUTE-HOUSTON	Private for-profit		
		PIMA MEDICAL INSTITUTE-HOUSTON	Private for-profit		
		SAN JACINTO COLLEGE-NORTH CAMPUS	Public		



Colleges in the City of Houston – 4 years or above

<u>AMERICAN COLLEGE OF ACUPUNCTURE AND ORIENTAL MED</u>	Private for-profit	<u>NATIONAL AMERICAN UNIVERSITY-HOUSTON</u>	Private for-profit	<u>THE ART INSTITUTE OF HOUSTON</u>	Private for-profit
<u>AMERICAN INTERCONTINENTAL UNIVERSITY-HOUSTON</u>	Private for-profit	<u>RELAY GRADUATE SCHOOL OF EDUCATION - HOUSTON</u>	Private not-for-profit	<u>THE COLLEGE OF HEALTH CARE PROFESSIONS-NORTHWEST</u>	Private for-profit
<u>BAYLOR COLLEGE OF MEDICINE</u>	Private not-for-profit	<u>REMINGTON COLLEGE-NORTH HOUSTON CAMPUS</u>	Private not-for-profit	<u>THE UNIVERSITY OF TEXAS HEALTH SCIENCE CENTER AT HOUSTON</u>	Public
<u>CHAMBERLAIN UNIVERSITY-TEXAS</u>	Private for-profit	<u>RICE UNIVERSITY</u>	Private not-for-profit	<u>THE UNIVERSITY OF TEXAS MD ANDERSON CANCER CENTER</u>	Public
<u>COLLEGE OF BIBLICAL STUDIES-HOUSTON</u>	Private not-for-profit	<u>SOUTH TEXAS COLLEGE OF LAW HOUSTON</u>	Private not-for-profit	<u>UNIVERSITY OF HOUSTON</u>	Public Two additional locations in Clear Lake and Downtown
<u>HOUSTON BAPTIST UNIVERSITY</u>	Private not-for-profit	<u>STRAYER UNIVERSITY - NORTHWEST HOUSTON CAMPUS</u>	Private for-profit	<u>UNIVERSITY OF PHOENIX-TEXAS</u>	Private for-profit
<u>HOUSTON GRADUATE SCHOOL OF THEOLOGY</u>	Private not-for-profit	<u>STRAYER UNIVERSITY-NORTHWEST HOUSTON</u>	Private for-profit	<u>UNIVERSITY OF ST THOMAS</u>	Private not-for-profit
		<u>TEXAS SOUTHERN UNIVERSITY</u>	Public		