



Economic Overview

City of Sugar Land, TX



Demographic Profile.....	3
Employment Trends	5
Wage Trends	6
Cost of Living Index	7
Industry Snapshot	8
Occupation Snapshot	10
Industry Clusters	12
Education Levels.....	13
City of Sugar Land, TX Regional Map	14
Region Definition.....	15
FAQ.....	16

Demographic Profile

The population in the City of Sugar Land, TX was 118,709 per American Community Survey data for 2015-2019.

The region has a civilian labor force of 61,276 with a participation rate of 64.2%. Of individuals 25 to 64 in the City of Sugar Land, TX, 63.5% have a bachelor's degree or higher which compares with 33.5% in the nation.

The median household income in the City of Sugar Land, TX is \$121,274 and the median house value is \$323,300.

Summary¹

	Percent			Value		
	City of Sugar Land, TX	Fort Bend County, Texas	Houston-The Woodlands-Sugar Land, TX MSA	City of Sugar Land, TX	Fort Bend County, Texas	Houston-The Woodlands-Sugar Land, TX MSA
Demographics						
Population (ACS)	—	—	—	118,709	765,394	6,884,138
Male	49.5%	49.1%	49.6%	58,728	375,912	3,417,036
Female	50.5%	50.9%	50.4%	59,981	389,482	3,467,102
Median Age ²	—	—	—	42.2	36.3	34.5
Under 18 Years	22.7%	27.7%	26.7%	26,986	211,669	1,838,874
18 to 24 Years	7.7%	8.3%	9.2%	9,193	63,514	629,959
25 to 34 Years	10.4%	12.2%	15.1%	12,383	93,615	1,040,118
35 to 44 Years	12.8%	15.3%	14.2%	15,187	117,048	980,953
45 to 54 Years	15.2%	14.0%	12.8%	18,059	107,505	882,542
55 to 64 Years	15.5%	11.8%	11.2%	18,385	90,697	769,710
65 to 74 Years	9.7%	7.1%	6.8%	11,464	54,028	467,085
75 Years, and Over	5.9%	3.6%	4.0%	7,052	27,318	274,897
Race: White	52.0%	51.7%	65.0%	61,783	395,904	4,476,788
Race: Black or African American	7.0%	20.5%	17.3%	8,266	157,134	1,188,933
Race: American Indian and Alaska Native	0.2%	0.3%	0.4%	250	2,600	28,809
Race: Asian	36.6%	20.2%	7.7%	43,406	154,513	532,270
Race: Native Hawaiian and Other Pacific Islander	0.2%	0.1%	0.1%	256	408	3,963
Race: Some Other Race	1.7%	4.3%	7.0%	2,006	33,215	482,576
Race: Two or More Races	2.3%	2.8%	2.5%	2,742	21,620	170,799
Hispanic or Latino (of any race)	11.4%	24.5%	37.3%	13,496	187,500	2,566,787
Economic						
Labor Force Participation Rate and Size (civilian population 16 years and over)	64.2%	66.9%	66.7%	61,276	386,796	3,495,441
Prime-Age Labor Force Participation Rate and Size (civilian population 25-54)	83.0%	82.4%	81.4%	37,821	262,050	2,361,684
Armed Forces Labor Force	0.1%	0.1%	0.1%	48	334	3,201
Veterans, Age 18-64	2.4%	3.3%	3.6%	1,741	15,679	155,441
Veterans Labor Force Participation Rate and Size, Age 18-64	85.5%	83.5%	81.3%	1,488	13,086	126,409
Median Household Income ²	—	—	—	\$121,274	\$97,743	\$68,658
Per Capita Income	—	—	—	\$53,529	\$39,994	\$34,400
Mean Commute Time (minutes)	—	—	—	31.2	33.5	30.2
Commute via Public Transportation	2.2%	1.6%	2.0%	1,254	5,656	65,292
Educational Attainment, Age 25-64						
No High School Diploma	4.1%	8.2%	15.7%	2,617	33,583	578,383
High School Graduate	11.6%	17.1%	22.9%	7,444	69,872	840,938
Some College, No Degree	14.3%	19.2%	20.5%	9,143	78,656	753,946
Associate's Degree	6.5%	7.5%	7.4%	4,187	30,676	273,243
Bachelor's Degree	36.5%	29.2%	21.5%	23,389	119,584	789,803
Postgraduate Degree	26.9%	18.7%	11.9%	17,234	76,494	437,010

Summary¹

	Percent			Value		
	City of Sugar Land, TX	Fort Bend County, Texas	Houston-The Woodlands- Sugar Land, TX MSA	City of Sugar Land, TX	Fort Bend County, Texas	Houston-The Woodlands- Sugar Land, TX MSA
Housing						
Total Housing Units	—	—	—	41,046	251,641	2,596,734
Median House Value (of owner-occupied units) ²	—	—	—	\$323,300	\$265,900	\$195,595
Homeowner Vacancy	1.2%	1.4%	1.6%	405	2,570	23,194
Rental Vacancy	7.5%	7.3%	8.3%	596	4,294	85,845
Renter-Occupied Housing Units (% of Occupied Units)	18.6%	22.8%	39.6%	7,319	54,300	930,510
Occupied Housing Units with No Vehicle Available (% of Occupied Units)	2.6%	2.2%	5.1%	1,007	5,281	120,628
Social						
Poverty Level (of all people)	4.2%	7.4%	13.7%	4,998	56,251	929,512
Households Receiving Food Stamps/SNAP	2.0%	6.9%	11.1%	803	16,409	261,845
Enrolled in Grade 12 (% of total population)	1.7%	1.5%	1.5%	1,964	11,471	101,746
Disconnected Youth ³	2.2%	1.6%	2.7%	141	709	10,071
Children in Single Parent Families (% of all children)	13.5%	22.6%	33.6%	3,523	46,459	592,261
Uninsured	7.0%	11.7%	18.1%	8,243	88,653	1,232,831
With a Disability, Age 18-64	4.3%	5.5%	7.8%	3,146	25,850	330,882
With a Disability, Age 18-64, Labor Force Participation Rate and Size	51.7%	45.1%	46.0%	1,627	11,656	152,206
Foreign Born	34.9%	28.9%	23.4%	41,404	221,516	1,613,984
Speak English Less Than Very Well (population 5 yrs and over)	13.3%	13.0%	16.7%	15,102	92,774	1,067,631

Source: [JobsEQ®](#)

1. American Community Survey 2015-2019, unless noted otherwise

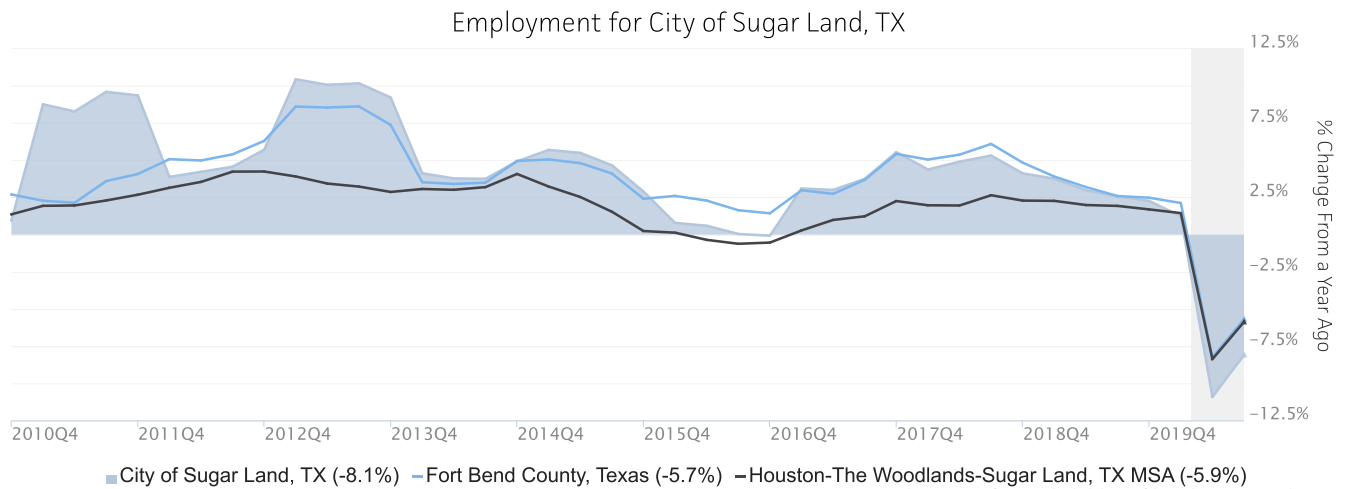
2. Median values for certain aggregate regions (such as MSAs) may be estimated as the weighted averages of the median values from the composing counties.

3. Disconnected Youth are 16-19 year olds who are (1) not in school, (2) not high school graduates, and (3) either unemployed or not in the labor force.

4. Census 2019, annual average growth rate since 2009

Employment Trends

As of 2020Q3, total employment for the City of Sugar Land, TX was 73,388 (based on a four-quarter moving average). Over the year ending 2020Q3, employment declined 8.1% in the region.

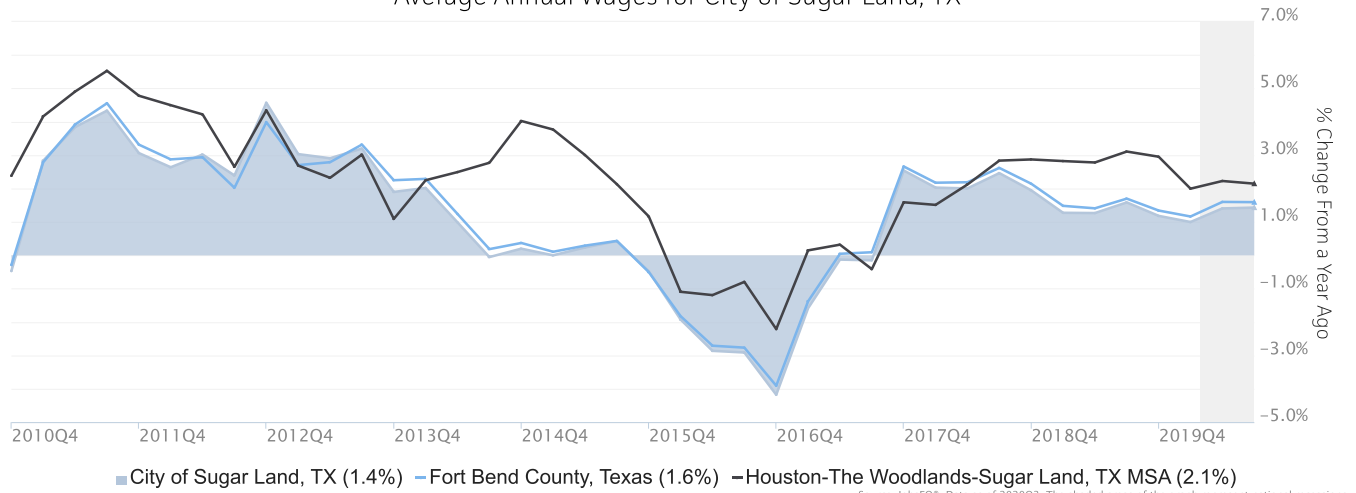


Employment data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data are updated through 2020Q2 with preliminary estimates updated to 2020Q3.

Wage Trends

The average worker in the City of Sugar Land, TX earned annual wages of \$52,055 as of 2020Q3. Average annual wages per worker increased 1.4% in the region over the preceding four quarters. For comparison purposes, annual average wages were \$60,042 in the nation as of 2020Q3.

Average Annual Wages for City of Sugar Land, TX



Annual average wages per worker data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data are updated through 2020Q2 with preliminary estimates updated to 2020Q3.

Cost of Living Index

The Cost of Living Index estimates the relative price levels for consumer goods and services. When applied to wages and salaries, the result is a measure of relative purchasing power. The cost of living is 2.4% higher in City of Sugar Land, TX than the U.S. average.

Cost of Living Information

	Annual Average Salary	Cost of Living Index (Base US)	US Purchasing Power
City of Sugar Land, TX	\$52,055	102.4	\$50,839
Fort Bend County, Texas	\$51,815	102.4	\$50,604
Houston-The Woodlands-Sugar Land, TX MSA	\$67,400	95.4	\$70,680
USA	\$60,042	100.0	\$60,042

Source: [JobsEQ®](#)

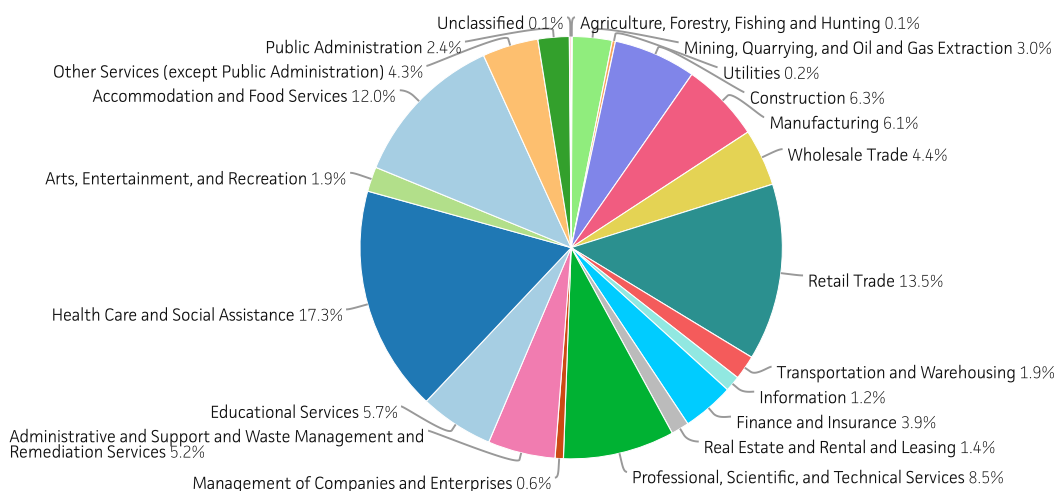
Data as of 2020Q3

Cost of Living per C2ER, data as of 2020q3, imputed by Chmura where necessary.

Industry Snapshot

The largest sector in the City of Sugar Land, TX is Health Care and Social Assistance, employing 12,687 workers. The next-largest sectors in the region are Retail Trade (9,938 workers) and Accommodation and Food Services (8,792). High location quotients (LQs) indicate sectors in which a region has high concentrations of employment compared to the national average. The sectors with the largest LQs in the region are Mining, Quarrying, and Oil and Gas Extraction (LQ = 7.68), Accommodation and Food Services (1.49), and Retail Trade (1.32).

Total Workers for City of Sugar Land, TX by Industry



Source: JobsEQ®, Data as of 2020Q3

Employment data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data are updated through 2020Q2 with preliminary estimates updated to 2020Q3.

Sectors in the City of Sugar Land, TX with the highest average wages per worker are Mining, Quarrying, and Oil and Gas Extraction (\$150,593), Management of Companies and Enterprises (\$94,211), and Finance and Insurance (\$84,243). Regional sectors with the best job growth (or most moderate job losses) over the last 5 years are Health Care and Social Assistance (+2,295 jobs), Retail Trade (+1,079), and Professional, Scientific, and Technical Services (+749).

Over the next 1 year, employment in the City of Sugar Land, TX is projected to expand by 1,936 jobs. The fastest growing sector in the region is expected to be Mining, Quarrying, and Oil and Gas Extraction with a +4.4% year-over-year rate of growth. The strongest forecast by number of jobs over this period is expected for Health Care and Social Assistance (+420 jobs), Accommodation and Food Services (+241), and Retail Trade (+191).

NAICS	Industry	Empl	Current	LQ	5-Year History		Total Demand	1-Year Forecast			Ann % Growth
			Avg Ann Wages		Empl Change	Ann %		Exits	Transfers	Empl Growth	
62	Health Care and Social Assistance	12,687	\$45,263	1.17	2,295	4.1%	1,628	594	614	420	3.3%
44	Retail Trade	9,938	\$32,436	1.32	1,079	2.3%	1,527	591	746	191	1.9%
72	Accommodation and Food Services	8,792	\$19,767	1.49	-26	-0.1%	1,675	635	800	241	2.7%
54	Professional, Scientific, and Technical Services	6,255	\$81,527	1.22	749	2.6%	716	201	339	176	2.8%
23	Construction	4,637	\$79,098	1.08	-271	-1.1%	569	164	294	111	2.4%
31	Manufacturing	4,471	\$76,378	0.74	-230	-1.0%	562	173	296	93	2.1%
61	Educational Services	4,149	\$48,629	0.69	413	2.1%	496	186	201	109	2.6%
56	Administrative and Support and Waste Management and Remediation Services	3,788	\$42,846	0.82	-185	-1.0%	537	186	254	97	2.6%
42	Wholesale Trade	3,210	\$78,352	1.14	308	2.0%	403	128	212	64	2.0%
81	Other Services (except Public Administration)	3,151	\$31,874	0.98	-93	-0.6%	445	165	197	82	2.6%
52	Finance and Insurance	2,889	\$84,243	0.95	592	4.7%	335	103	169	63	2.2%
21	Mining, Quarrying, and Oil and Gas Extraction	2,235	\$150,593	7.68	-332	-2.7%	330	75	156	99	4.4%
92	Public Administration	1,752	\$57,837	0.49	91	1.1%	204	69	93	42	2.4%
71	Arts, Entertainment, and Recreation	1,385	\$25,345	1.10	93	1.4%	240	88	109	43	3.1%
48	Transportation and Warehousing	1,369	\$39,700	0.39	571	11.4%	182	62	85	35	2.6%
53	Real Estate and Rental and Leasing	1,010	\$53,703	0.78	108	2.3%	124	47	56	21	2.1%
51	Information	876	\$57,795	0.60	218	5.9%	104	31	54	19	2.2%
55	Management of Companies and Enterprises	466	\$94,211	0.41	55	2.5%	55	16	27	12	2.7%
22	Utilities	170	\$83,809	0.44	-60	-5.9%	19	6	10	3	1.9%
99	Unclassified	92	\$31,326	1.23	75	40.1%	13	4	6	2	2.5%
11	Agriculture, Forestry, Fishing and Hunting	67	\$31,814	0.07	-8	-2.1%	9	3	4	1	2.0%
Total - All Industries		73,388	\$52,055	1.00	5,441	1.6%	10,006	3,450	4,619	1,936	2.6%

Source: [JobsEQ®](#)

Employment data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data are updated through 2020Q2 with preliminary estimates updated to 2020Q3. Forecast employment growth uses national projections adapted for regional growth patterns.

Occupation Snapshot

The largest major occupation group in the City of Sugar Land, TX is Office and Administrative Support Occupations, employing 9,267 workers. The next-largest occupation groups in the region are Sales and Related Occupations (8,793 workers) and Food Preparation and Serving Related Occupations (8,446). High location quotients (LQs) indicate occupation groups in which a region has high concentrations of employment compared to the national average. The major groups with the largest LQs in the region are Food Preparation and Serving Related Occupations (LQ = 1.48), Construction and Extraction Occupations (1.29), and Healthcare Practitioners and Technical Occupations (1.27).

Occupation groups in the City of Sugar Land, TX with the highest average wages per worker are Legal Occupations (\$118,500), Management Occupations (\$115,400), and Architecture and Engineering Occupations (\$96,100). The unemployment rate in the region varied among the major groups from 2.2% among Legal Occupations to 16.5% among Personal Care and Service Occupations.

Over the next 1 year, the fastest growing occupation group in the City of Sugar Land, TX is expected to be Healthcare Support Occupations with a +4.1% year-over-year rate of growth. The strongest forecast by number of jobs over this period is expected for Food Preparation and Serving Related Occupations (+242 jobs) and Sales and Related Occupations (+175). Over the same period, the highest separation demand (occupation demand due to retirements and workers moving from one occupation to another) is expected in Food Preparation and Serving Related Occupations (1,625 jobs) and Sales and Related Occupations (1,326).

City of Sugar Land, TX, 2020Q3¹

SOC	Occupation	Empl	Mean Ann Wages ²	Current			Online Job Ads	5-Year History		Total Demand	1-Year Forecast			
				LQ	Unempl	Unempl Rate		Empl Change	Ann %		Exits	Transfers	Empl Growth	Ann % Growth
43- 0000	Office and Administrative Support	9,267	\$38,900	0.98	358	5.7%	n/a	666	1.5%	1,340	489	677	174	1.9%
41- 0000	Sales and Related	8,793	\$40,300	1.24	418	6.8%	n/a	540	1.3%	1,500	520	806	175	2.0%
35- 0000	Food Preparation and Serving Related	8,446	\$23,700	1.48	481	14.3%	n/a	-60	-0.1%	1,867	661	964	242	2.9%
29- 0000	Healthcare Practitioners and Technical	5,447	\$80,900	1.27	105	2.2%	n/a	1,118	4.7%	508	159	183	166	3.0%
53- 0000	Transportation and Material Moving	4,831	\$33,600	0.79	208	8.9%	n/a	700	3.2%	805	250	429	126	2.6%
11- 0000	Management	4,519	\$115,400	0.94	166	3.3%	n/a	625	3.0%	535	119	293	123	2.7%
47- 0000	Construction and Extraction	4,427	\$45,000	1.29	114	9.9%	n/a	-372	-1.6%	705	155	416	134	3.0%
51- 0000	Production	3,568	\$38,700	0.83	72	7.3%	n/a	-181	-1.0%	524	152	299	73	2.1%
31- 0000	Healthcare Support	3,549	\$25,200	1.09	77	5.1%	n/a	776	5.1%	646	235	266	145	4.1%
13- 0000	Business and Financial Operations	3,535	\$80,800	0.86	179	3.6%	n/a	563	3.5%	466	108	262	97	2.7%
25- 0000	Educational Instruction and Library	3,025	\$46,500	0.73	339	6.5%	n/a	287	2.0%	385	140	165	79	2.6%
49- 0000	Installation, Maintenance, and Repair	2,407	\$46,400	0.86	41	4.9%	n/a	185	1.6%	323	83	178	62	2.6%
39- 0000	Personal Care and Service	2,280	\$27,500	1.18	207	16.5%	n/a	236	2.2%	444	169	208	67	2.9%
15- 0000	Computer and Mathematical	1,980	\$90,600	0.88	89	3.2%	n/a	288	3.2%	229	37	127	65	3.3%
37- 0000	Building and Grounds Cleaning and Maintenance	1,612	\$26,400	0.66	62	8.0%	n/a	-62	-0.8%	281	102	133	46	2.9%
17- 0000	Architecture and Engineering	1,448	\$96,100	1.13	71	3.2%	n/a	-87	-1.2%	163	38	88	37	2.5%

City of Sugar Land, TX, 2020Q3¹

SOC	Occupation	Empl	Mean Ann Wages ²	Current			5-Year History			1-Year Forecast				
				LQ	Unempl	Unempl Rate	Online Job Ads	Empl Change	Ann %	Total Demand	Exits	Transfers	Empl Growth	Ann % Growth
27- 0000	Arts, Design, Entertainment, Sports, and Media	1,188	\$52,500	0.91	155	9.8%	n/a	74	1.3%	176	54	91	31	2.6%
33- 0000	Protective Service	1,056	\$48,100	0.66	29	3.2%	n/a	44	0.9%	146	51	68	26	2.4%
21- 0000	Community and Social Service	794	\$52,100	0.61	41	2.7%	n/a	-47	-1.1%	121	33	63	26	3.3%
19- 0000	Life, Physical, and Social Science	628	\$76,200	0.95	36	3.6%	n/a	76	2.6%	82	13	50	18	2.9%
23- 0000	Legal	529	\$118,500	0.85	18	2.2%	n/a	75	3.1%	51	14	22	14	2.6%
45- 0000	Farming, Fishing, and Forestry	57	\$31,600	0.12	2	9.1%	n/a	-4	-1.3%	11	2	8	1	2.3%
Total - All Occupations		73,388	\$48,600	1.00	n/a	n/a	n/a	5,441	1.6%	11,317	3,585	5,796	1,936	2.6%

Source: [JobsEQ®](#)

Data as of 2020Q3 unless noted otherwise

Note: Figures may not sum due to rounding.

1. Data based on a four-quarter moving average unless noted otherwise.

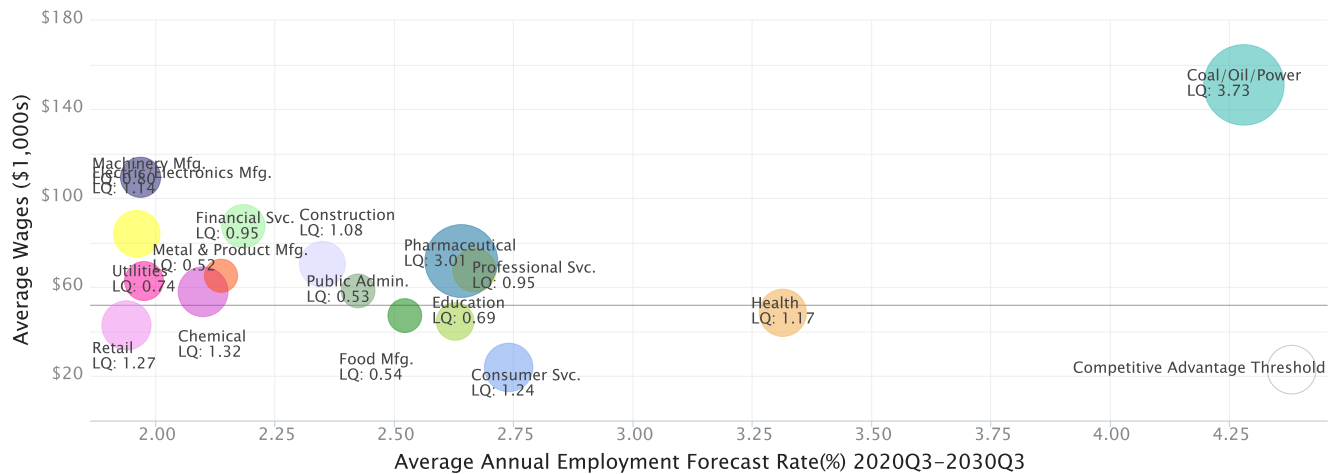
2. Wage data are as of 2019 and represent the average for all Covered Employment

Occupation employment data are estimated via industry employment data and the estimated industry/occupation mix. Industry employment data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and currently updated through 2020Q2, imputed where necessary with preliminary estimates updated to 2020Q3. Wages by occupation are as of 2019 provided by the BLS and imputed where necessary. Forecast employment growth uses national projections from the Bureau of Labor Statistics adapted for regional growth patterns.

Industry Clusters

A cluster is a geographic concentration of interrelated industries or occupations. The industry cluster in the City of Sugar Land, TX with the highest relative concentration is Coal/Oil/Power with a location quotient of 3.73. This cluster employs 2,363 workers in the region with an average wage of \$150,944. Employment in the Coal/Oil/Power cluster is projected to expand in the region about 4.3% per year over the next ten years.

Industry Clusters for City of Sugar Land, TX as of 2020Q3



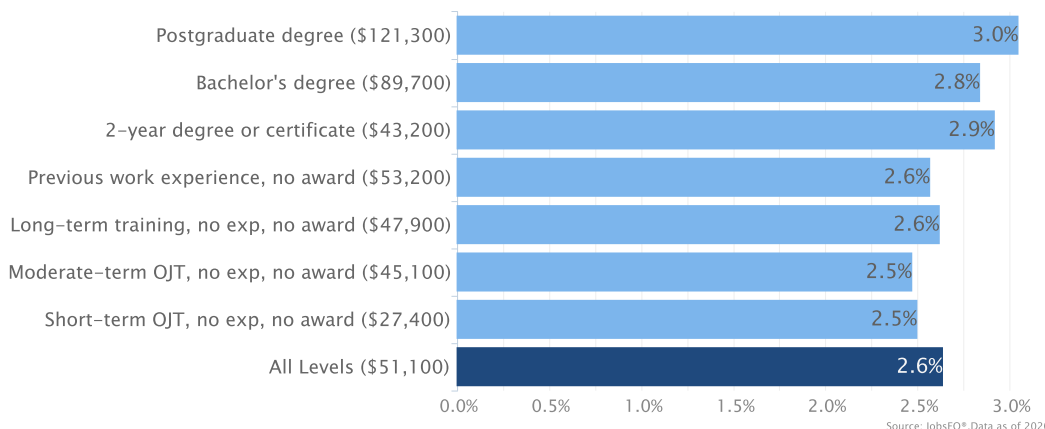
Source: JobsEQ®, Data as of 2020Q3

Location quotient and average wage data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics, imputed where necessary, and updated through 2020Q2 with preliminary estimates updated to 2020Q3. Forecast employment growth uses national projections from the Bureau of Labor Statistics adapted for regional growth patterns.

Education Levels

Expected growth rates for occupations vary by the education and training required. While all employment in the City of Sugar Land, TX is projected to grow 2.6% over the next ten years, occupations typically requiring a postgraduate degree are expected to grow 3.0% per year, those requiring a bachelor's degree are forecast to grow 2.8% per year, and occupations typically needing a 2-year degree or certificate are expected to grow 2.9% per year.

Annual Average Projected Job Growth by Training Required for City of Sugar Land, TX



Employment by occupation data are estimates as of 2020Q3. Education levels of occupations are based on BLS assignments. Forecast employment growth uses national projections from the Bureau of Labor Statistics adapted for regional growth patterns.

City of Sugar Land, TX Regional Map



Region Definition

Houston-The Woodlands-Sugar Land, TX MSA is defined as the following counties:

Austin County, Texas
Brazoria County, Texas
Chambers County, Texas
Fort Bend County, Texas
Galveston County, Texas

Harris County, Texas
Liberty County, Texas
Montgomery County, Texas
Waller County, Texas

FAQ

What is a location quotient?

A location quotient (LQ) is a measurement of concentration in comparison to the nation. An LQ of 1.00 indicates a region has the same concentration of an industry (or occupation) as the nation. An LQ of 2.00 would mean the region has twice the expected employment compared to the nation and an LQ of 0.50 would mean the region has half the expected employment in comparison to the nation.

What is separation demand?

Separation demand is the number of jobs required due to separations—labor force exits (including retirements) and turnover resulting from workers moving from one occupation into another. Note that separation demand does not include all turnover—it does not include when workers stay in the same occupation but switch employers. The total projected demand for an occupation is the sum of the separation demand and the growth demand (which is the increase or decrease of jobs in an occupation expected due to expansion or contraction of the overall number of jobs in that occupation).

What is a cluster?

A cluster is a geographic concentration of interrelated industries or occupations. If a regional cluster has a location quotient of 1.25 or greater, the region is considered to possess a competitive advantage in that cluster.

What is the difference between industry wages and occupation wages?

Industry wages and occupation wages are estimated via separate data sets, often the time periods being reported do not align, and wages are defined slightly differently in the two systems (for example, certain bonuses are included in the industry wages but not the occupation wages). It is therefore common that estimates of the average industry wages and average occupation wages in a region do not match exactly.

What is NAICS?

The North American Industry Classification System (NAICS) is used to classify business establishments according to the type of economic activity. The NAICS Code comprises six levels, from the “all industry” level to the 6-digit level. The first two digits define the top level category, known as the “sector,” which is the level examined in this report.

What is SOC?

The Standard Occupational Classification system (SOC) is used to classify workers into occupational categories. All workers are classified into one of over 804 occupations according to their occupational definition. To facilitate classification, occupations are combined to form 22 major groups, 95 minor groups, and 452 occupation groups. Each occupation group includes detailed occupations requiring similar job duties, skills, education, or experience.

About This Report

This report and all data herein were produced by JobsEQ®, a product of Chmura Economics & Analytics. The information contained herein was obtained from sources we believe to be reliable. However, we cannot guarantee its accuracy and completeness.