

# The 43rd Kinder Houston Area Survey

Houston of Tomorrow



RICE UNIVERSITY

Kinder Institute for Urban Research

*Building Better Cities, Building Better Lives*

MAY 20, 2024

“The story of Houston is that we are there first. ...  
By 2050, all of America will look like Houston looks today.  
**This is where the American future is going to be worked out.**”

— Stephen Klineberg,  
founder of the Kinder Houston Area Survey and  
co-founder of the Kinder Institute for Urban Research

## Acknowledgments

The 43rd Kinder Houston Area Survey could not happen without thousands of Houston-area residents taking the time and effort to be part of the Greater Houston Community Panel. These individuals share with us their attitudes, values, and experiences, providing invaluable insights into their lived experiences. It is because of them and through them that we are able to learn about and tell the story of Houston.

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# Table of Contents

---

<b>Introduction</b>	<b>3</b>
Methodology	4

---

<b>Houston Past and Present</b>	<b>6</b>
Crime and safety	6
Housing	10
Economy	11
Houston-area identities	14
Public transportation and public education	16

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<b>Houston of Tomorrow</b>	<b>18</b>
Climate change	18
Energy transition	20
Artificial intelligence	23

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<b>Looking to the Future</b>	<b>27</b>
------------------------------	-----------

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<b>Concluding Thoughts</b>	<b>30</b>
----------------------------	-----------

# Index of Figures

<b>Map 1:</b> Greater Houston Community Panel neighborhood areas	<b>5</b>	<b>Figure 11:</b> The percentage of Houston-area residents using mass transit at least once a week varies by demographics and income levels.	<b>17</b>
<b>Figure 1:</b> Crime and safety, cost of housing, and the economy are considered the “biggest problems” facing the Houston area today.	<b>7</b>	<b>Figure 12:</b> Support for greater investment in public schools has been increasing since 2005 and remains at an all-time high.	<b>17</b>
<b>Map 2:</b> The Houston area’s “biggest problem” varied across Harris County neighborhoods.	<b>7</b>	<b>Figure 13:</b> Over half of households earning below \$50,000 predict negative impacts from climate change on their health, finances, and communities.	<b>19</b>
<b>Figure 2:</b> Perception of crime and safety as the “biggest problem” declined steadily until 2021, even when crime rates rose slightly after 2018.	<b>8</b>	<b>Map 4:</b> Residents’ belief that climate change will negatively impact the quality of life in their neighborhood varied across the city and county.	<b>21</b>
<b>Map 3:</b> More than 20% of residents in six neighborhood areas rated the police as doing a “poor” job, while more than 20% of residents in 12 neighborhoods said police were doing a “worse” job protecting and serving them than other neighborhoods.	<b>9</b>	<b>Figure 14:</b> About 7 in 10 Houstonians say corporations and governments should be doing more to address climate change.	<b>21</b>
<b>Figure 3:</b> Corporations, landlords, and neighborhood opposition were the most commonly cited causes of affordability challenges in Houston.	<b>10</b>	<b>Figure 15:</b> Clear majorities — young adults in particular — widely agree the Houston region should be a leader in the energy transition.	<b>22</b>
<b>Figure 4:</b> Non-renters tended to cite corporations and investors for their effect on housing affordability; renters placed more blame on landlords.	<b>11</b>	<b>Figure 16:</b> About 3 in 4 Houston-area residents are “worried,” “very worried,” or “extremely worried” about the isolation of the Texas power grid and its reliability.	<b>23</b>
<b>Figure 5:</b> Compared to 2020, more than twice as many Houston-area residents reported their finances have worsened in the past few years.	<b>12</b>	<b>Figure 17:</b> Personal use of advanced artificial intelligence tools such as ChatGPT is limited across age groups, especially older adults.	<b>24</b>
<b>Figure 6:</b> The percentage of Houston-area residents who do not have enough savings to cover a \$400 emergency is at its highest recorded level.	<b>13</b>	<b>Figure 18:</b> Houston-area workers in leisure and hospitality and professional and business services are more likely to anticipate a major impact from AI.	<b>25</b>
<b>Figure 7:</b> Since 2016, Houstonians have been much less likely to see those receiving government help as “taking advantage of the system.”	<b>13</b>	<b>Figure 19:</b> Majorities of workers in some industries are not worried about losing their job because of AI or automation.	<b>26</b>
<b>Figure 8:</b> Since 2020, Houston-area residents tend to disagree that Black people and other minorities have the same opportunities as White people in the U.S.	<b>14</b>	<b>Figure 20:</b> Across every demographic and income level, Houstonians express more excitement than worry about their future.	<b>28</b>
<b>Figure 9:</b> The percentage of Houston-area residents identifying as Republican has steadily declined since the early 1990s.	<b>15</b>	<b>Figure 21:</b> Fewer Houstonians see crime as an issue 20 years from now, while housing remains a long-term concern.	<b>29</b>
<b>Figure 10:</b> The percentage of religiously unaffiliated Houston-area residents has steadily risen in the past 15 years.	<b>15</b>		



## Introduction

**T**he year 2036 will be Houston's bicentennial celebration — 200 years as a city — and many of the youth who will graduate from high school that year began kindergarten this past fall. When the city enters its third century, the social, political, and economic conditions present today will almost certainly have changed.

The next decade will likely find Houston's economy in the midst of transformation, as artificial intelligence and related technologies gain more widespread adoption. Digital fluency will become even more valuable, as many workers will need to adapt to new tools and technologies across a variety of industries. Education will remain a critical determinant of who is able to

prosper economically, though the importance of a typical college degree may diminish if employers target skills or certifications that can be learned in high school computer science classrooms or through specialized courses untethered to a traditional university.

An additional catalyst of change to Houston's economy will be the global energy transition toward renewable and carbon-neutral sources. Because of the city's legacy in the oil and gas industry — which created one of the biggest metropolitan economies in the United States — it is uniquely positioned to be a leader in the transition. The region has the opportunity to reaffirm its status as the energy capital of the world, whereas failing to do so could risk a painful economic contrac-



tion. Beyond the economic incentives, making this transition is imperative for the region as it grapples with the impacts of climate change, and the existential threats posed by sea-level rise and intensifying storms.

As Houston evolves, its population is expected to continue to grow. According to one estimate from the Houston-Galveston Area Council, the metropolitan area could bloom to 9.6 million residents by 2040.<sup>1</sup> That represents a nearly 35% increase in population relative to its 2020 level.

With this future in mind, the year 2024 serves as an inflection point: The city of Houston has a new mayor for the first time in nearly a decade, an impending national election could define the course of the country for another generation, and uncertainties that previously existed in some distant future — such as the effects of climate change, the transition toward new energy sources, and the rise of artificial intelligence — are becoming realities that must be contended with now.

With so much happening in the social, political, and economic domains that will impact the future of the city, the theme of the 43rd annual Kinder Houston Area Survey — which provides an unparalleled look at current conditions and where residents see the region going — is “Houston of Tomorrow.” The results of the survey show Houstonians are excited about the next 10 to 20 years and how emerging opportunities may reshape their lives, careers, and communities, while also recognizing the challenges that must be addressed for this potential to be realized.

## Methodology

Findings for this report come from the 43rd annual Kinder Houston Area Survey administered to the Greater Houston Community Panel (GHCP), a collaboration with the UTHealth School of Public Health in which a scientifically selected group of Harris County adults completes multiple surveys throughout the year.

On Jan. 22, 2024, a total of 7,610 panel members were invited to complete the Kinder Houston Area Survey. Invitations to the online survey were sent via email and text messaging. In addition to the initial invitation, follow-up emails and text messages were sent to encourage panel members to complete the survey, which remained open for about four weeks, closing on Feb. 16, 2024. It received 5,376 responses, giving it a response rate of 70.6% and reaching the highest number of participants in its history.

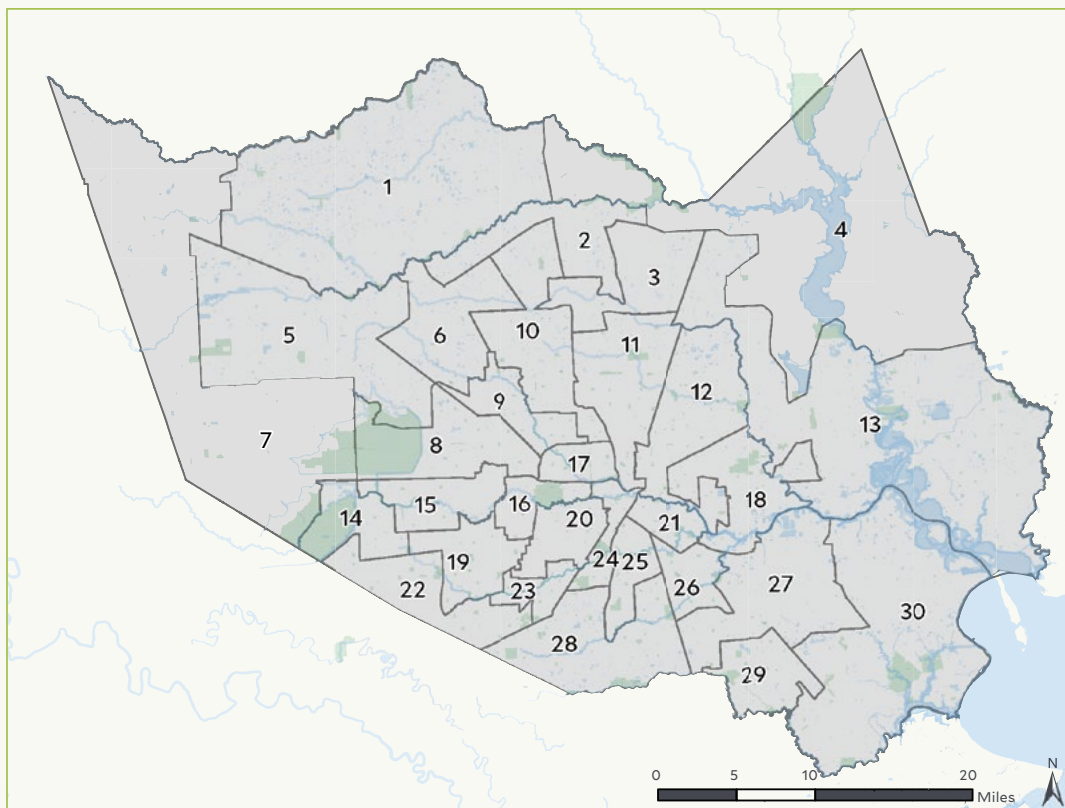
Of the 5,376 respondents, 20 were missing key demographic data, so they could not be included in the calculation of the sampling weight. Survey responses were weighted to reflect the county’s population in terms of race, ethnicity, age, gender, educational attainment, and homeownership, resulting in a final analytic sample of 5,356, where 52% were female and 48% were male; 8% were Asian, 19% were Black, 42% were Hispanic, and 27% were White; and the average age was 42. Because of the sampling techniques used, when weighted, estimates from the survey are representative of all adults in Harris County. Throughout the report, findings that are said to reflect “Houston-area residents” are inclusive of all of Harris County, including the city of Houston.

In addition to providing estimates for the whole county, the number of respondents in the GHCP also allowed researchers to conduct an analysis by neighborhood areas. In total, 30 distinct neighborhood areas were constructed with aggregated GHCP data to compare results across smaller areas of Harris County (Map 1). The areas were created using spatial clustering methods. A supplemental document further explaining the creation of the neighborhood areas is available at <https://kinder.rice.edu/houstonsurvey2024>.

1 2040 Regional Transportation Plan Demographics | Houston-Galveston Area Council (H-GAC). (n.d.). Retrieved January 19, 2024, from <https://www.h-gac.com/regional-transportation-plan/2040/demographics>

## MAP 1

## GREATER HOUSTON COMMUNITY PANEL NEIGHBORHOOD AREAS



Area name	
1	Greater Tomball & Klein
2	Aldine Northwest & Cypress Creek
3	Greenspoint & IAH
4	Greater Crosby & Huffman
5	Greater Cypress South & Copperfield
6	Greater Jersey Village
7	Greater Waller & Katy
8	Greater Spring Branch
9	Oak Forest, Inwood & Fairbanks
10	Greater Spring & Aldine West
11	Northside & Eastex
12	Greater East Little York
13	Greater Baytown & Sheldon
14	Eldridge & West Oaks
15	Memorial & Briar Forest

Area name	
16	Memorial Park & Uptown
17	The Heights & Lazybrook
18	Greater Northshore & Galena Park
19	Greater Sharpstown
20	Bellaire & River Oaks
21	Second Ward & Lawndale
22	Alief & Brays Oaks
23	Braeswood, Willow Meadows & Meyerland
24	Downtown & Midtown
25	Sunnyside & South Union
26	Greater Golfcrest & Gulfgate
27	Pasadena & Hobby
28	Five Corners & Minnetex
29	South Belt & Ellington
30	La Porte & Clear Lake



## » Houston Past and Present

Since its inception in 1982, the Kinder Houston Area Survey has asked residents hundreds of standard questions at various intervals to see how attitudes, perspectives, and experiences in the Houston area have changed or stayed the same. To explore Houston's past and better understand its present, a series of these "legacy" questions were fielded again in 2024, including one that has appeared on every survey since 1982, which asks residents to name the biggest problem facing the Houston area today. This year, for Houston and Harris County overall, the three most commonly reported biggest problems were: 1) crime and safety, 2) housing affordability, and 3) the economy (Figure 1).

Crime and safety was the most commonly cited "biggest problem" in 19 of the 30 neighborhood areas in the county, while housing affordability was the most commonly identified in seven neighborhood areas (Map 2). The economy was the most commonly cited biggest problem in two neighborhood areas, and traffic and infrastructure were each identified as the most common in one neighborhood area apiece.

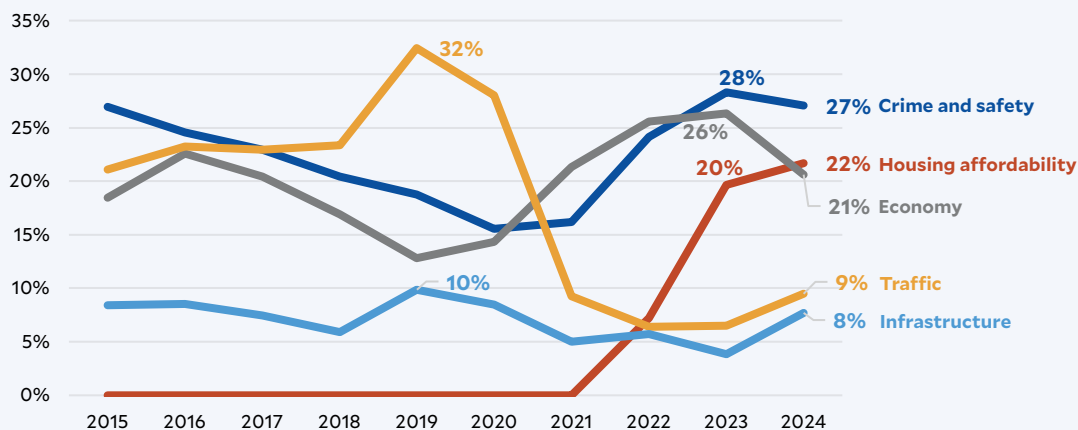
### Crime and safety

More than 1 in 4 Houston-area residents cited crime and safety as the biggest problem facing the area, making it the most commonly reported concern for the second straight year. It has been a top issue



FIGURE 1

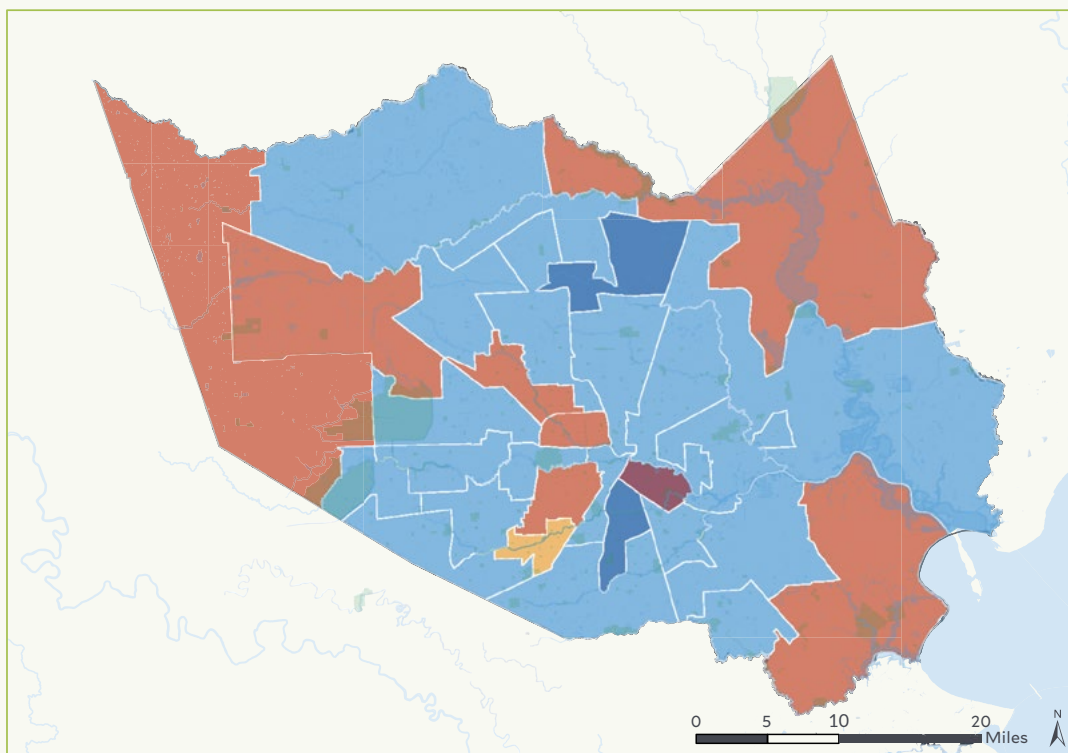
**CRIME AND SAFETY, COST OF HOUSING, AND THE ECONOMY ARE CONSIDERED THE “BIGGEST PROBLEMS” FACING THE HOUSTON AREA TODAY.**



Note: The chart includes the five most frequent categorized responses to the open-ended question, “What would you say is the biggest problem facing people in the Houston area today?” The other categories are pollution and the environment (5% in 2024), social group tensions (2%), city government and taxes (2%), schools and children (1%), public health and health care (1%), and other (3%).

MAP 2

**THE HOUSTON AREA’S “BIGGEST PROBLEM” VARIED ACROSS HARRIS COUNTY NEIGHBORHOODS.**



What is the biggest problem facing Houston today?

■ Housing affordability 
 ■ Crime & safety 
 ■ Economy 
 ■ Infrastructure 
 ■ Traffic

among Houstonians for decades. Between 1992 and 1997, more than half of Kinder Houston Area Survey respondents cited crime and safety as the biggest problem. In fact, exactly 30 years ago — in the 1994 survey — more than 3 out of 4 residents flagged crime as the biggest problem.

In comparison, 3 out of 4 residents in this year's survey identified something *other than crime* as the region's central problem. Still, crime and safety was the most commonly identified biggest problem, and the number of residents listing it as the biggest problem has been on the rise since 2020.

At odds with the increase in residents listing crime as the biggest problem is the fact that the Houston area has seen a drop in rates of several major types of crime, including homicide and sexual assault, according to data compiled by the Harris County Office of County Administration. In addition, the city and county's total reported crime rate, which includes homicide, sexual

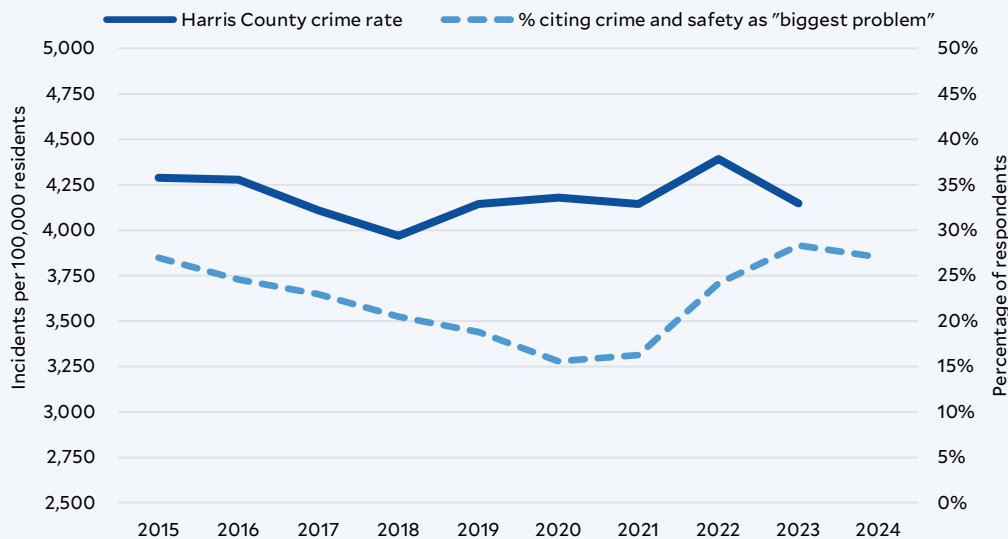
assault, assault,<sup>2</sup> auto theft, burglary, robbery, and larceny, was lower in 2023 (4,146 incidents per 100,000 residents) than it was in 2015 (4,288 incidents per 100,000 residents) (Figure 2). The overall decline in crime rate does not mean that all crimes have been on the decline across these years; for example, the number of auto thefts per 100,000 residents increased almost 36% from 2015 to 2023.

While concern about crime and safety remains high, it does not mean that Houstonians are dissatisfied with local law enforcement agencies. While 16% of residents said local law enforcement was doing a “poor” job serving and protecting their neighborhood, another 48% gave them a “fair” rating, 30% gave them a “good” rating, and 6% gave them an “excellent” rating.

- 2 For purposes of its analysis, the Harris County Office of County Administration defined assault as “aggravated assault,” meaning an unlawful attack by one person upon another for the purpose of inflicting severe or aggravated bodily injury. This type of assault is usually accompanied by the use of a weapon or by means likely to produce death or great bodily harm. For other definitions used, see <https://www.dps.texas.gov/sites/default/files/documents/crimereports/18/appendices.pdf>.

FIGURE 2

**PERCEPTION OF CRIME AND SAFETY AS THE “BIGGEST PROBLEM” DECLINED STEADILY UNTIL 2021, EVEN WHEN CRIME RATES ROSE SLIGHTLY AFTER 2018.**



Total crime rate combines homicide, assault, rape, robbery, burglary, auto theft, and larceny reported for the calendar year. Source: Harris County Index-Crimes Dashboard

Ratings of local law enforcement differed across neighborhood areas around the city and county (Map 3). Six neighborhoods had fewer than 10% of residents rate law enforcement as “poor”: Greater Tomball & Klein; Greater Crosby & Huffman; Greater Cypress South & Copperfield; The Heights & Lazybrook; La Porte & Clear Lake; and Second Ward & Lawndale. In contrast, seven neighborhoods had more than 20% of residents rate local law enforcement as “poor”: Greater Golfcrest & Gulfgate; Sunnyside & South Union; Greater Northshore & Galena Park; Greater East Little York; Pasadena & Hobby; Greenspoint & IAH; and Aldine Northwest & Cypress Creek. In the Greenspoint & IAH and Aldine Northwest & Cypress Creek neighborhood areas, more than 33% of residents graded local law enforcement as “poor.”

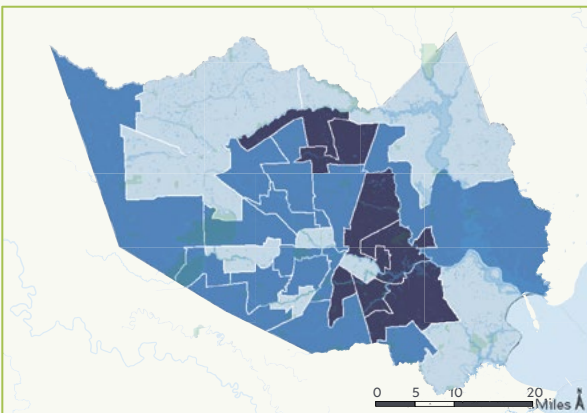
A majority of residents (56%) also felt local law enforcement served their neighborhood at least as well as other neighborhoods. Another 25% said local law enforcement did a better job serving their neighborhood than other neighborhoods. The remaining 19% — or almost 1 in 5 — felt local law enforcement did a “worse” job protecting and serving their neigh-

borhood than others. Again, these sentiments varied across the county. Seven areas had fewer than 10% of residents who said local law enforcement did a “worse” job in their neighborhood, whereas 12 neighborhood areas had more than 20% of residents report the same (Map 3). In the Aldine Northwest & Cypress Creek area, nearly half of residents (48%) said local law enforcement did a “worse” job protecting and serving their neighborhood than others.

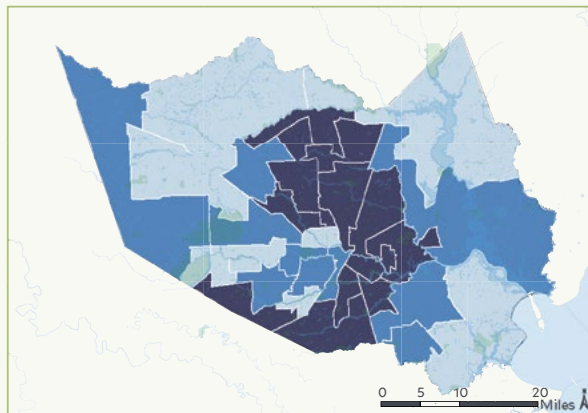
Even as residents had mixed feelings about the job being done by local law enforcement, a majority of Houston-area residents (55%) said a greater presence of local law enforcement in their neighborhood would help them feel safer. In four areas — Greater Northshore & Galena Park, Greater Jersey Village, Greater Spring Branch, and Northside & Eastex — more than 67% of residents said a greater presence would make them feel safer. The Greater Northshore & Galena Park area represents an interesting juxtaposition of attitudes, having a high percentage of residents (33%) rating local law enforcement as doing a “poor” job, while also having the highest percentage (80%) saying a greater presence would help them feel safer.

### MAP 3

**MORE THAN 20% OF RESIDENTS IN SIX NEIGHBORHOOD AREAS RATED THE POLICE AS DOING A “POOR” JOB, WHILE MORE THAN 20% OF RESIDENTS IN 12 NEIGHBORHOODS SAID POLICE WERE DOING A “WORSE” JOB PROTECTING AND SERVING THEM THAN OTHER NEIGHBORHOODS.**



Percentage of respondents saying police are doing a poor job

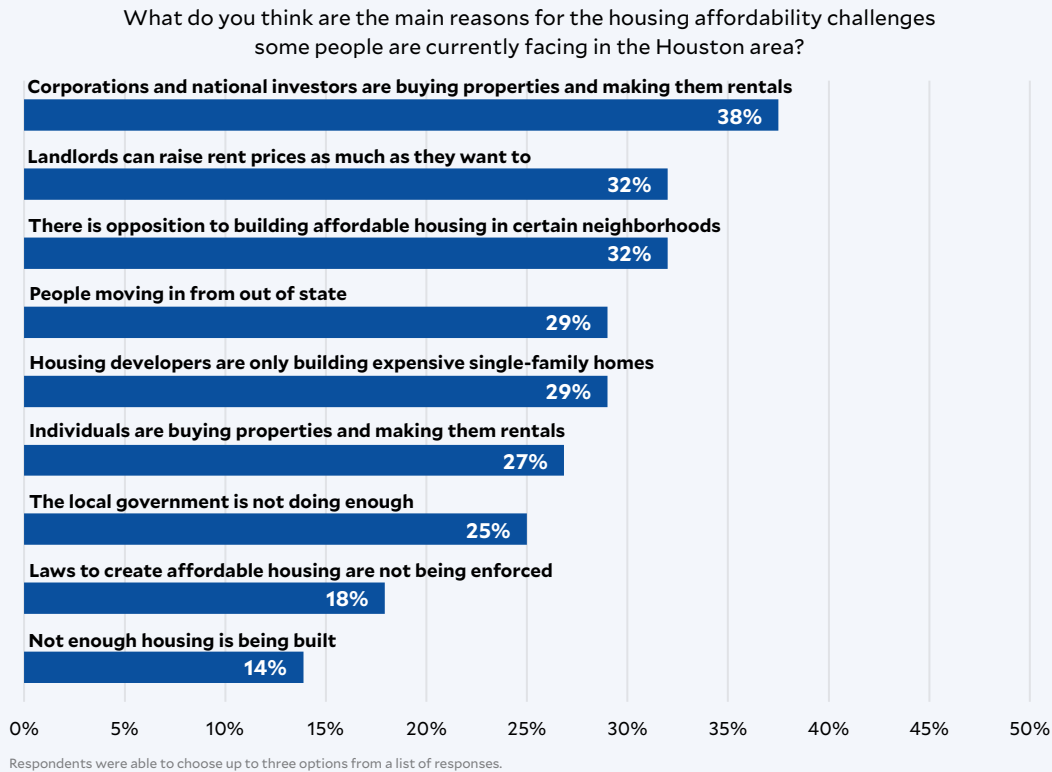


Percentage of respondents saying police serve their neighborhood worse compared to others

Less than 10%    10% to 20%    More than 20%

FIGURE 3

**CORPORATIONS, LANDLORDS, AND NEIGHBORHOOD OPPOSITION WERE THE MOST COMMONLY CITED CAUSES OF AFFORDABILITY CHALLENGES IN HOUSTON.**



Almost a third of residents (31%) thought a greater presence of local law enforcement in their neighborhood would have “no effect” on their sense of safety, and the remaining 14% indicated they would feel “less safe.” These sentiments varied by race and ethnicity. Nearly 1 in 5 Black residents said a greater presence would make them feel less safe, compared to about 1 in 7 Hispanic residents and 1 in 7 Asian residents; only 1 in 11 White residents felt the same way. Young adults were also more likely to say the presence of local law enforcement would lead them to feel less safe in their neighborhood — with about 1 in 4 adults under the age of 30 expressing this sentiment compared to only 1 in 25 over the age of 55.

## Housing

As much as crime and safety may be a perennial challenge in the region, an emerging issue raised by resi-

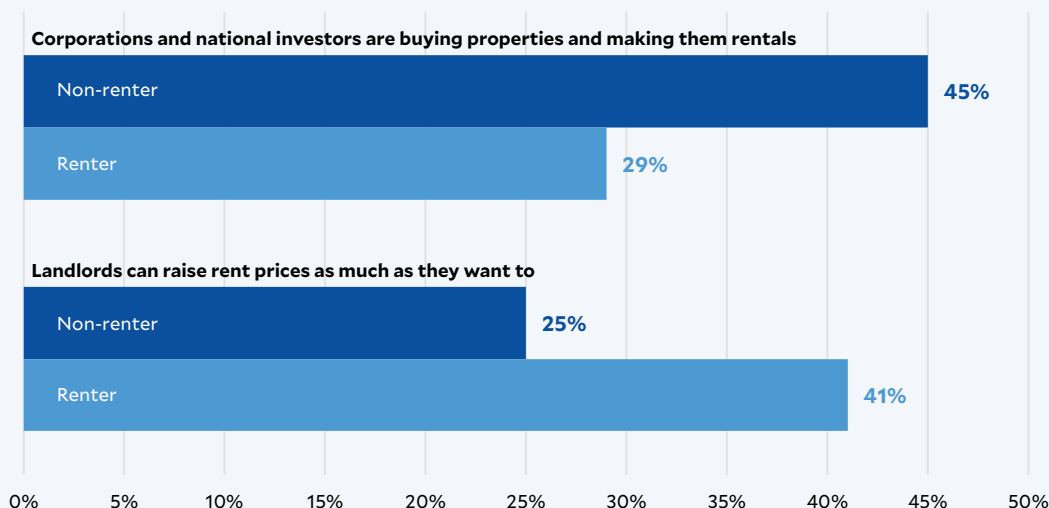
dents is housing affordability. For the second consecutive year, more than 1 in 5 identified the cost of housing as the biggest problem facing the Houston area, making it the second-most commonly identified issue.

Houston has historically been one of the most affordable areas for housing in the country. For example, in 2011 when the median price of a home in the United States was \$225,000,<sup>3</sup> the median cost of a home in the Houston area was \$165,000. However, as housing costs around the country have risen, Houston has not been immune; in 2022, the median cost of a home was over \$335,000 in the city and over \$315,000 in the

3 U.S. Census Bureau and U.S. Department of Housing and Urban Development. (2024) Median Sales Price of Houses Sold for the United States [MSPUS], retrieved from FRED, Federal Reserve Bank of St. Louis; <https://fred.stlouisfed.org/series/MSPUS>

FIGURE 4

**NON-RENTERS TENDED TO CITE CORPORATIONS AND INVESTORS FOR THEIR EFFECT ON HOUSING AFFORDABILITY; RENTERS PLACED MORE BLAME ON LANDLORDS.**



county. Rental rates have also increased, further straining people's budgets as wages and earnings have not kept pace over the years.

Despite the growing number of residents who identified housing affordability as the biggest problem facing Houston, there is not a consensus about the reason costs are going up. When asked what they think are the main reasons for the housing affordability challenges facing the Houston area, the most common response chosen was "Corporations and national investors ... buying properties and making them rentals," picked by 38% of area residents (Figure 3). The second- and third-most commonly chosen reasons — each picked by about one-third of residents — were "Landlords can raise rent prices as much as they want to" and "There is opposition to building affordable housing in certain neighborhoods."

Renters and non-renters held slightly different perceptions of the causes of higher housing costs (Figure 4). Almost half of non-renters (45%) pointed the finger at corporations and national investors buying properties and turning them into rentals as one of the main reasons, compared to less than 30% of renters. Conversely, more than 40% of renters said higher

housing costs were the result of landlords being able to raise rent prices as much as they wanted, whereas less than one-quarter of non-renters felt the same.

## Economy

About 21% of residents identified the economy as the biggest problem facing the Houston area in 2024, making it the third-most commonly identified issue. While that is down 5 percentage points from last year, several indicators show that many residents still face challenging economic and financial circumstances.

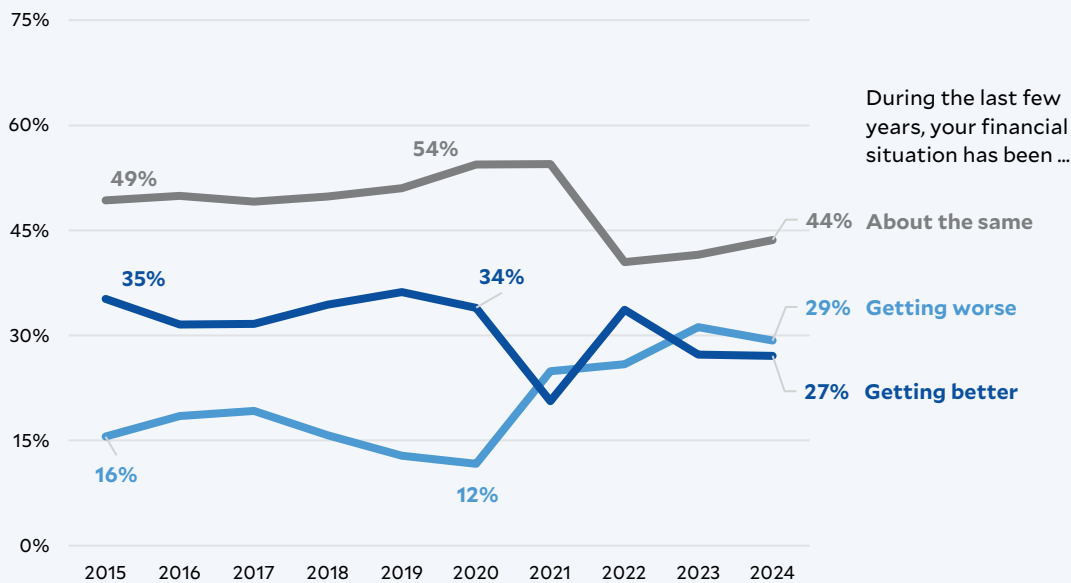
For example, about 27% said their personal financial situation had improved in the past few years (Figure 5). At the same time, a similar number of residents — 29% — said their financial situation had worsened, leaving the bulk of residents — 44% — saying their situation was largely unchanged.

A further reflection of people's stagnating or worsening financial circumstances is the slight increase in the percentage of residents saying they could not come up with \$400 to pay for an unexpected emergency. In 2023, about 42% said they could not come up with the money, and in 2024 that number rose to 46% — the highest-reported level since 2019, when this question



FIGURE 5

COMPARED TO 2020, MORE THAN TWICE AS MANY HOUSTON-AREA RESIDENTS REPORTED THEIR FINANCES HAVE WORSENE IN THE PAST FEW YEARS.



was first asked of Houston-area residents (Figure 6). Being unable to pay for a \$400 emergency varied across groups, including by education level; 15% of residents with a college degree said they would be unable to pay compared with 66% of residents who have up to a high school diploma.

As many Houston-area families find themselves experiencing challenging financial situations, residents continue to appreciate the safety nets available to those in need. In 2022, about 270,000 households — roughly 15% of all households in Houston and Harris County — received Supplemental Nutrition Assistance Program benefits or cash public assistance, according to American Community Survey estimates.<sup>4</sup> Houston has gone from an area that saw welfare recipients as “taking advantage of the system” to seeing it as a service for people who “really need the help” (Figure 7). This represents a continuation of a funda-

mental shift in views. When this question was first asked in 1995, about 60% of area residents felt welfare recipients were taking advantage of the system, and over half felt that way until 2018. Since then, more than half have said welfare recipients really need the help.

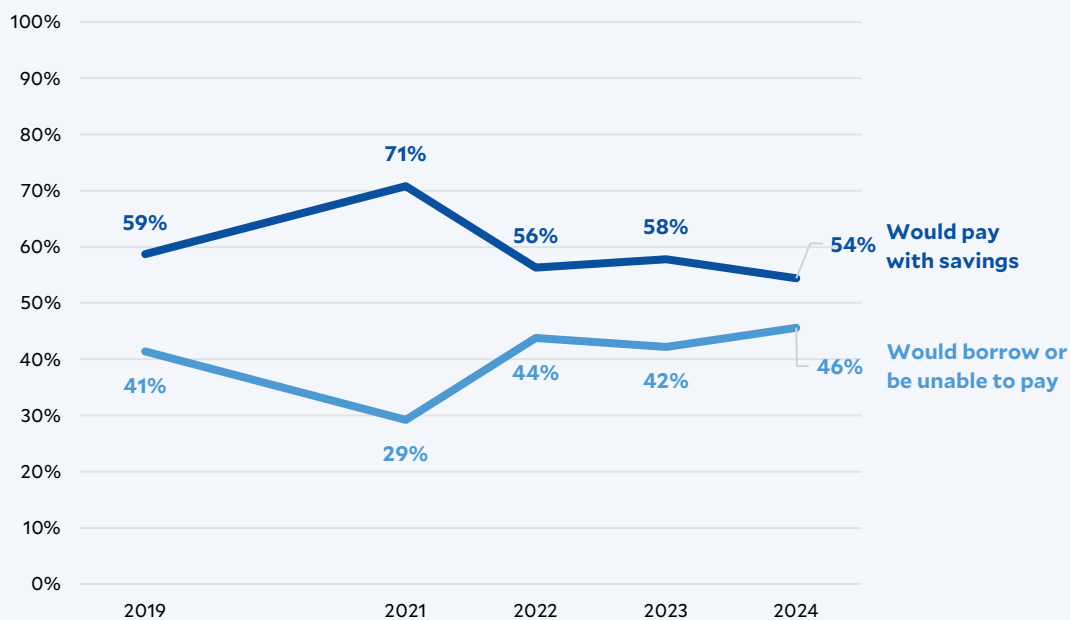
Even as views toward welfare have evolved, Houstonians’ preference for helping others who help themselves has remained steadfast. The vast majority of residents (84%) agree the government should make sure anyone who wants to work is able to find a job.

Within this context of wanting to make sure people have what they need to get ahead, area residents also display a growing awareness that not all individuals have the same chances to succeed. Specifically, residents were asked if they thought Black people and other minorities have the same opportunities as White people in the U.S. today. In 2024, about 57% of Houstonians thought White people had an advantage (Figure 8) — meaning the percentage of residents acknowledging the disparate opportunities of racial/ethnic groups has increased by more than 20 percentage points in the last 10 years. A particularly large

4 U.S. Census Bureau. (2022). Public Assistance Income in the Past 12 Months for Households (Harris County). American Community Survey, ACS 1-Year Estimates Detailed Tables, Table B19058.

FIGURE 6

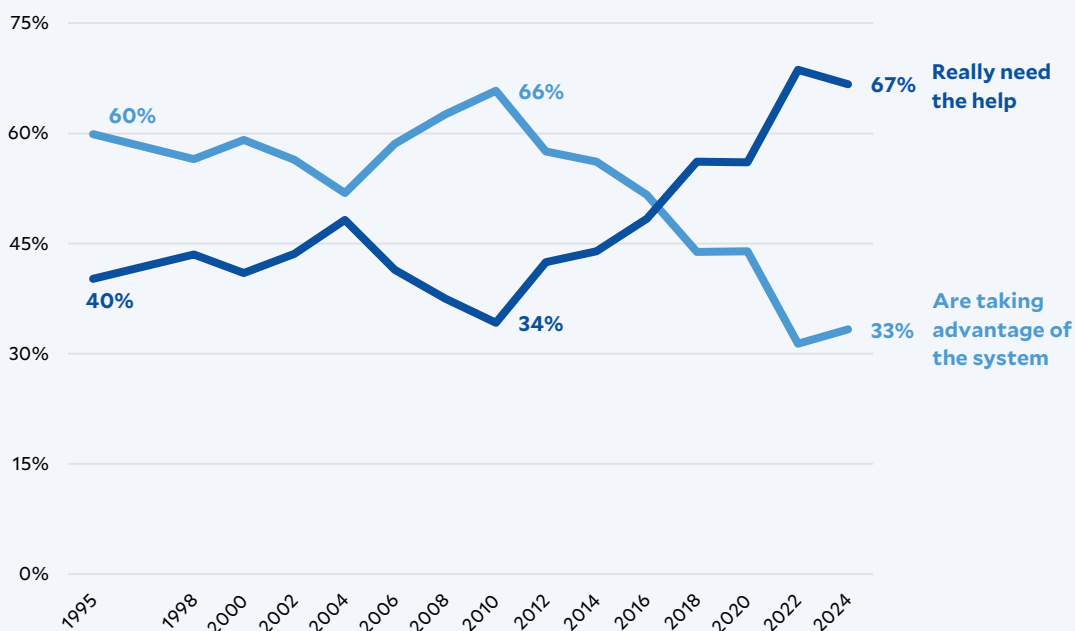
THE PERCENTAGE OF HOUSTON-AREA RESIDENTS WHO DO NOT HAVE ENOUGH SAVINGS TO COVER A \$400 EMERGENCY IS AT ITS HIGHEST RECORDED LEVEL.



Respondents chose one of three options to the question, "Suppose you suddenly had to come up with \$400 to deal with an unexpected emergency. How would you handle a situation like that?" The responses "I would borrow the money" and "I would not be able to come up with that kind of money right now" are combined above.

FIGURE 7

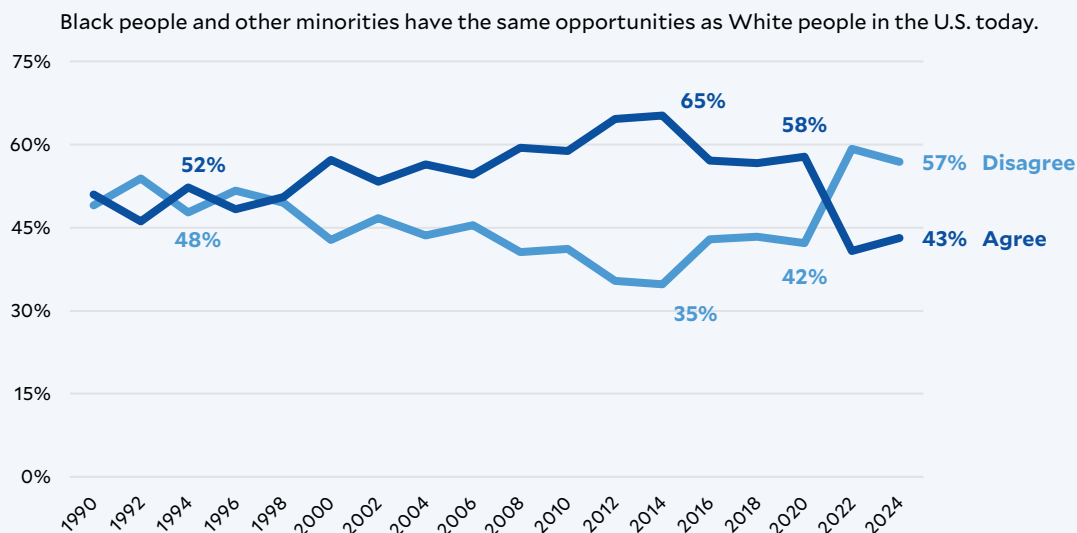
SINCE 2016, HOUSTONIANS HAVE BEEN MUCH LESS LIKELY TO SEE THOSE RECEIVING GOVERNMENT HELP AS "TAKING ADVANTAGE OF THE SYSTEM."



Respondents were asked, "Which statement do you agree with more? Most welfare recipients: Really need the help, or are taking advantage of the system?"

FIGURE 8

**SINCE 2020, HOUSTON-AREA RESIDENTS TEND TO DISAGREE THAT BLACK PEOPLE AND OTHER MINORITIES HAVE THE SAME OPPORTUNITIES AS WHITE PEOPLE IN THE U.S.**



Note: Respondents were given four options to rate their agreement with the statement, "Black people and other minorities have the same opportunities as White people in the U.S. today." Responses of "strongly agree" and "agree" and "strongly disagree" and "disagree" are combined into the two measures here.

increase occurred from 2020 to 2022, corresponding to the social unrest around the country following the murder of George Floyd by Minneapolis police officers in the summer of 2020. While the number has declined in the last 2 years, it continues to remain near the all-time high.

## Houston-area identities

Following national trends reported by the Pew Research Center,<sup>5</sup> the Houston area has seen a steady rise in residents identifying as independent or other political affiliations along with a decline in Republican affiliation over the last two decades (Figure 9). In 2005, there was a near-even split in residents identifying as Republican (32%), Democrat (32%), and independent/other (36%). In 2024, about 44% of Houston-area residents identified as independent/other compared to 18% who identified as Republican.

5 Pew Research Center. (2018, March 20). Trends in party affiliation among demographic groups. <https://www.pewresearch.org/politics/2018/03/20/1-trends-in-party-affiliation-among-demographic-groups/>

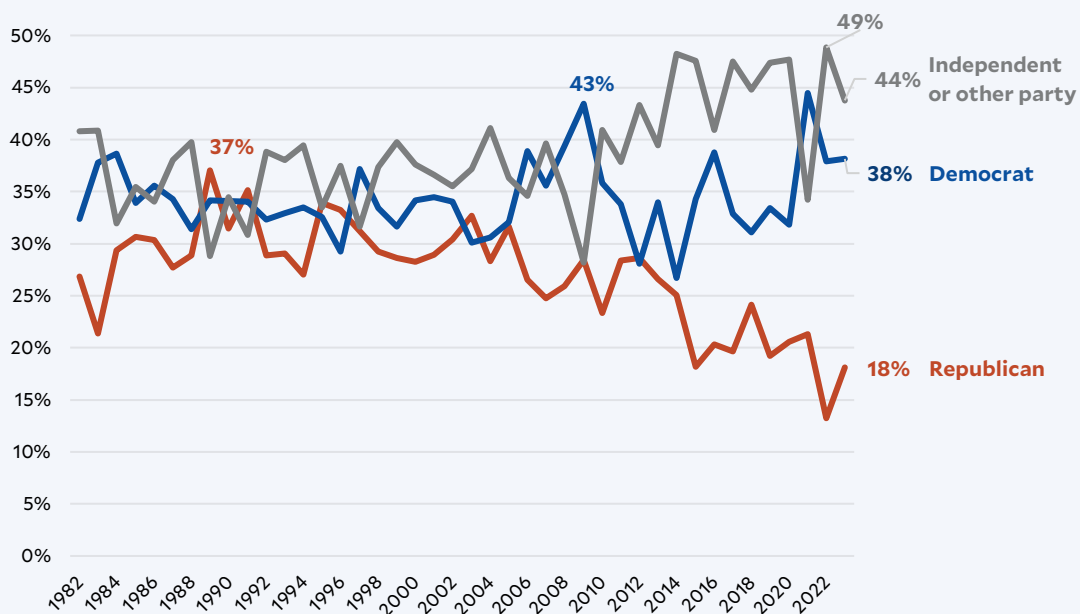
The United States has also seen a decline in the number of people identifying with a religion for a few decades,<sup>6</sup> but in Houston, this decrease only began in the last 15 years. In 2009, over 80% of area residents identified as Christian (54% Protestant and 31% Catholic). Since then the number has steadily declined, and in 2024, 64% identified as Christian. The most notable drop-off was among those identifying as Protestant, which decreased to 38%, while 26% identified as Catholic (Figure 10). The decline in the percentage of area residents identifying as Christian has not been met with a steady rise in affiliations with other religions, such as Judaism, Islam, or Buddhism, but with the rise of the "Nones." In 2024, about 27% identified their religious affiliation as "no religion/atheist."

In line with these changes, the reported importance of religion in people's lives has shifted over the last

6 Pew Research Center. (2022, September 13). How U.S. religious composition has changed in recent decades. <https://www.pewresearch.org/religion/2022/09/13/how-u-s-religious-composition-has-changed-in-recent-decades/>

FIGURE 9

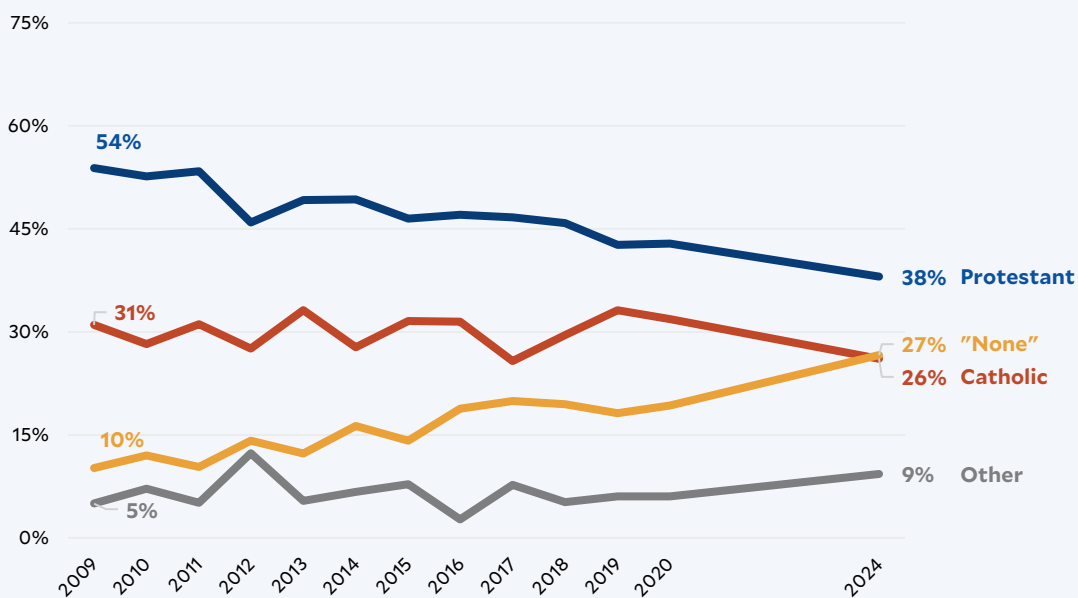
THE PERCENTAGE OF HOUSTON-AREA RESIDENTS IDENTIFYING AS REPUBLICAN HAS STEADILY DECLINED SINCE THE EARLY 1990s.



Note: Respondents could choose between "Republican," "independent," "Democrat," and "other/please specify" to the question, "Would you call yourself a Republican, a Democrat, an independent, or something else?"

FIGURE 10

THE PERCENTAGE OF RELIGIOUSLY UNAFFILIATED HOUSTON-AREA RESIDENTS HAS STEADILY RISEN IN THE PAST 15 YEARS.



Note: "None" includes responses of "atheist" and "no religion." "Other" combines responses including Eastern Orthodox, Jewish, Buddhist, Hindu, Muslim, Islam, Sufi, Sunni, Shia, Mormon, Jehovah's Witness and "some other religion."

several decades. Starting in 2009, a declining number of Houston-area residents have said religion was “very important” to them, dropping from about 69% to 47% in 2024. At the same time, the percentage reporting religion as “not important” increased from 10% in 2009 to 24% in 2024.

A final element of Houstonians’ identity has to do with residents’ willingness to welcome others into the Houston community, in particular, the support shown toward welcoming refugees. Since 2016, area residents have been asked if they agree or disagree that refugees who are in danger in their home countries because of their beliefs or ethnicities should be welcome in Houston. Every year, more than 67% have agreed with that statement, including in 2024 when 71% agreed.

## Public transportation and public education

Across most U.S. cities, public transportation ridership has struggled to return to pre-pandemic levels, as remote and hybrid work options have reduced some commutes. This is the case in Houston. The Metropolitan Transit Authority of Harris County (Metro) reported 5.6 million rides in January 2024,<sup>7</sup> about 22% fewer than in January 2020. Park-and-ride service, which takes commuters from Harris County’s outlying areas to downtown or the Texas Medical Center, reported almost 50% fewer rides in January 2024 compared to January 2020. Metro’s light rail network, which marks its 20th year of service this year, had 33% fewer rides.

More than two-thirds of residents said they had not used Houston’s mass transit (e.g., bus or light rail) in the past year, which is aligned with ridership levels measured by the Kinder Houston Area Survey going back to 2010. There was a slight increase in residents saying they rode public transit at least once a week, from 8% in 2022 to 13% in 2024 — which translates

to about 1 in 8 Harris County residents or nearly 470,000 adults.

Some groups reported much higher usage of mass transit. Almost 1 in 4 Black residents said they rode at least once a week, compared to around 1 in 20 White residents (Figure 11). Younger adults were also more likely to report riding the bus or light rail — about 1 in 6 adults under the age of 30 said they took mass transit at least once a week, compared to less than 1 in 10 older adults. Finally, bus and light rail appear to be serving a key transportation function for people earning less than \$25,000 per year: Almost 25% reported taking the bus or light rail at least once a week, compared to less than 5% of people earning more than \$100,000.

Importantly, these numbers reflect what residents are doing, not necessarily what residents would prefer to be doing. In 2019, almost 7 in 10 Harris County voters supported \$3.5 billion in Metro bonds to improve and expand transit service, a clear mandate for investment. For reasons related to proximity, timeliness, or convenience, people who might otherwise use public transportation instead use a car or some other means. Having only 13% of residents riding mass transit at least once a week does not necessarily suggest weak demand or a lack of need, and understanding the potential unmet demand should be explored with future research.

Another public good that Houston-area residents have made clear they are willing to fund further is public education, and such support has never been as strong as it is today. Since the early 1990s, when the question was first asked, residents have often been split 50/50 on whether schools had enough money — if spent wisely — or needed more money to provide a high-quality education (Figure 12). This near-equal divide remained until about 2009.

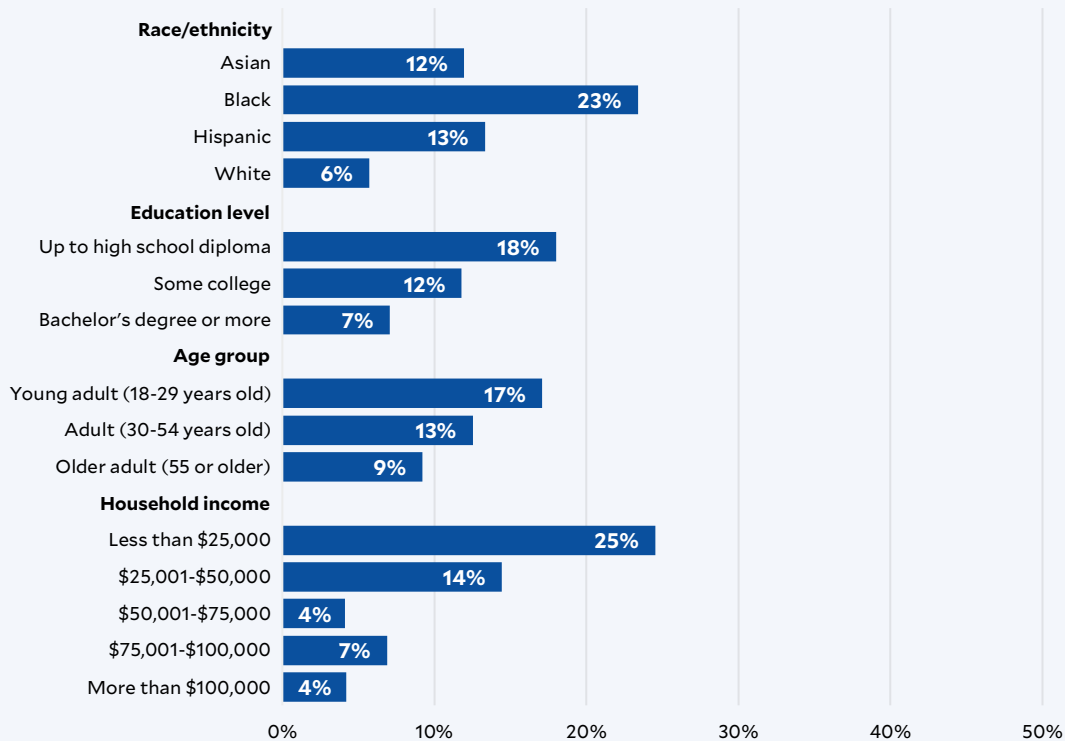
In 2018, residents were asked the question again for the first time since 2009, and more residents felt schools needed more money than ever before. Since then, support for additional school funding has only increased. In 2024, 70% of residents agreed schools needed more funding to provide a high-quality education.

7 Metropolitan Transit Authority of Harris County. (January 2020 and January 2024) Ridership reports. [Data set] [https://metro.resourcepace.com/pages/collections\\_featured.php?parent=16661](https://metro.resourcepace.com/pages/collections_featured.php?parent=16661)



FIGURE 11

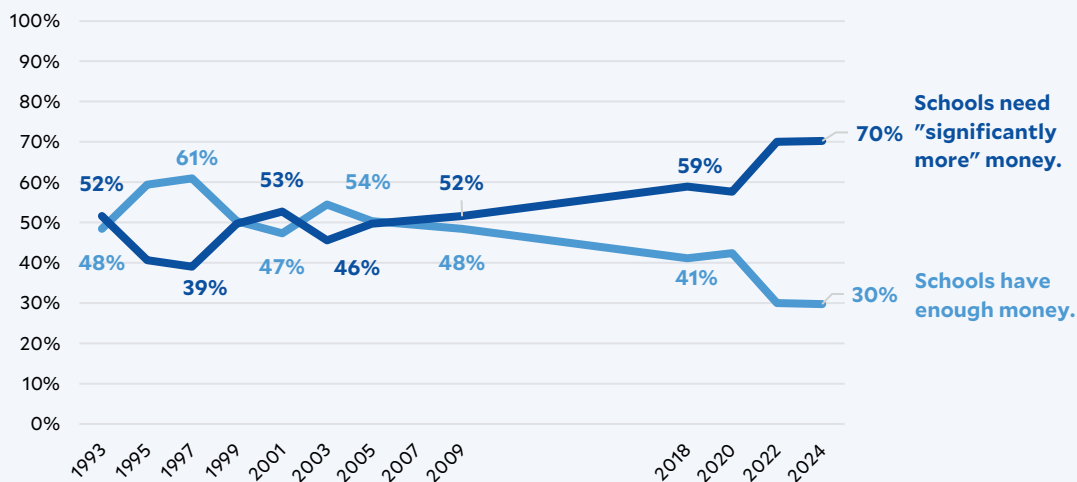
THE PERCENTAGE OF HOUSTON-AREA RESIDENTS USING MASS TRANSIT AT LEAST ONCE A WEEK VARIES BY DEMOGRAPHICS AND INCOME LEVELS.



Note: The survey asked, "During the past year, how often, if at all, did you ride on Houston's mass transit, such as bus or light rail?" Responses of "daily" and "at least once a week" are combined above. Other options were "once a month," "less than once a month," and "not at all in the past year."

FIGURE 12

SUPPORT FOR GREATER INVESTMENT IN PUBLIC SCHOOLS HAS BEEN INCREASING SINCE 2005 AND REMAINS AT AN ALL-TIME HIGH.



The survey asked, "Which of these statements comes closest to your opinion about the public schools in the general Houston area: 'In order for the schools to provide a quality education, significantly more money will be needed' or 'The schools have enough money to provide a quality education.'"



BRANDON MARTIN/RICE UNIVERSITY

## » Houston of Tomorrow

**H**ouston is positioned to lead the nation's future in part because it is already living in it. As one of the country's most diverse metro areas — if not the most diverse — it already has the demographic composition the U.S. is predicted to have by 2050. Beyond simply its composition, Houston's affinity for the future is evidenced by its status as a destination region, attracting people from the rest of the state, country, and world to live here. The city is home to the world's largest medical center, where internationally renowned doctors come to work on the front lines fighting epidemics, global pandemics, and chronic illness like heart disease and cancer. The region has produced technologies for space travel and trained the astronauts who ultimately conduct such exploration. It is an area that has, for better or worse,

embraced the new over the tried and true, and this forward-looking spirit reaches across the city and region and into the residents who live here. This is why the Kinder Houston Area Survey asked residents to reflect on the future, opportunities they see emerging, and the concerns they hope to address.

### Climate change

According to federal estimates, a person born in 2020 will experience more extreme weather events in their lifetime than one born in 1965. These events and their costs are perhaps the most visible signs of a changing climate. For context, during the 1980s, the country experienced a billion-dollar (inflation-adjusted) disaster every four months, and now billion-dollar disasters

happen once every three weeks, on average. Since 1980, Texas has suffered \$375 billion in total damages from natural disaster events, and this is projected to increase in an accelerated manner in the years to come.<sup>8</sup> According to one study, Harris County, already one of the most natural disaster-prone counties in the country, could see its flood risk increase 52% over the next few decades.

It should not be a surprise, then, that residents are concerned about the impacts of climate change. In the 2024 Kinder Houston Area Survey, nearly 60% said they were either “worried,” “very worried,” or “extremely worried” about the impact of climate change

on the region, while only 13% said they were “not at all worried.” For residents who expressed some degree of worry, nearly 90% said they were worried “sometimes,” “often,” or “very often”; in other words, it was a regular fixture in their thinking about the future.

Among the 13% of residents who did not worry about climate change, about one-third of them said it was because they thought “the effects of climate change are exaggerated” (34%), about one-fifth of them said “there are other more urgent priorities” to worry about (21%), one-seventh of them said “climate change will not impact me personally for a long time to come,” and another one-seventh of them said “there is no reason to worry about something we cannot do anything about.”

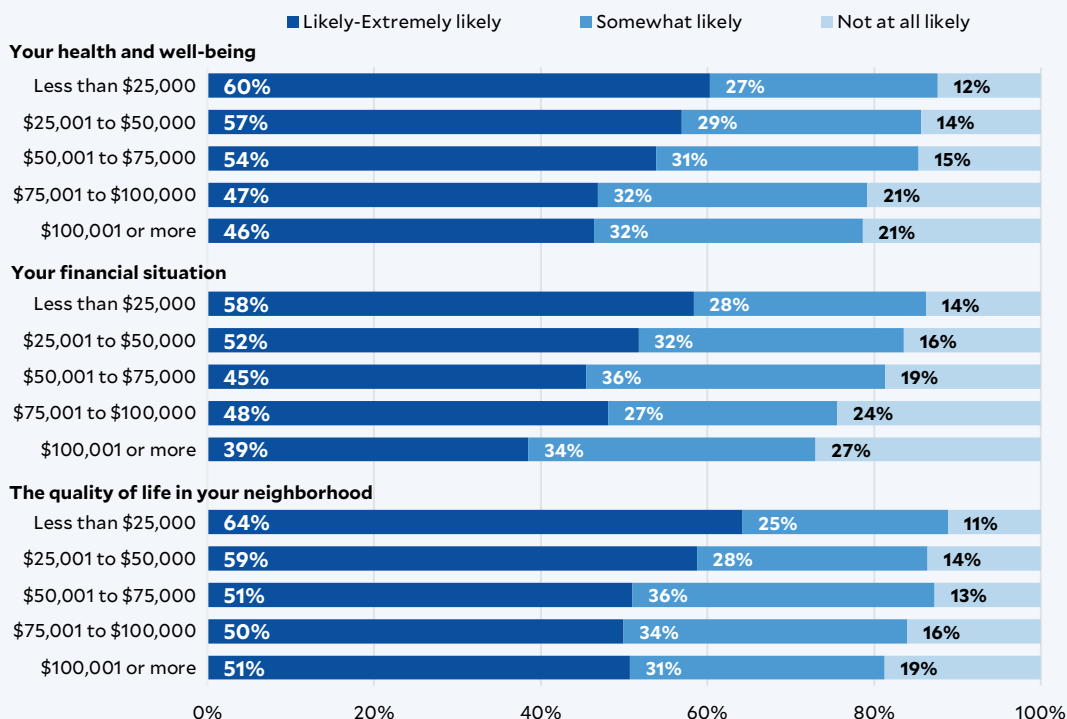
Regardless of whether or not they are worried about climate change, most residents think it is likely it will

8 U.S. Global Change Research Program. (2023). Chapter 1: Overview. Fifth national climate assessment. Washington, DC. doi: 10.7930/NCA5.2023.CH1

FIGURE 13

**OVER HALF OF HOUSEHOLDS EARNING BELOW \$50,000 PREDICT NEGATIVE IMPACTS FROM CLIMATE CHANGE ON THEIR HEALTH, FINANCES, AND COMMUNITIES.**

In the next 10 years, how likely is it that climate change will have a noticeably negative impact on:



Note: Responses of “Likely,” “Very likely,” and “Extremely likely” were combined into one value. Totals may not equal 100 because of rounding.

have a noticeably negative impact on many facets of life in Houston in the next 10 years. The survey found that 84% of residents think it is somewhat likely, likely, or very likely climate change will have a negative impact on their own health and well-being in the next 10 years. Additionally, 81% think it is at least somewhat likely their own financial situation will be negatively affected by climate change. Beyond themselves, residents are also concerned climate change will negatively impact the community where they live: 86% said it was at least somewhat likely their quality of life would be compromised, and 86% thought Houston's economic prosperity would be impacted. Finally, 90% of residents felt it was at least somewhat likely local plant and animal species would be affected by climate change. Sentiments about the negative impacts of climate change were shared across groups in the area, including across income levels (Figure 13).

Concern with climate change varied by neighborhood area. The percentage of residents who indicated it was likely, very likely, or extremely likely climate change would negatively impact the quality of life in their neighborhood ranged from about 41% in Greater Crosby & Huffman to 71% in The Heights & Lazybrook (Map 4).

Finally, when asked who should be doing more (or less) to address climate change, about 70% of Houstonians said local officials, state officials, federal agencies, and large businesses and corporations should all be doing more (Figure 14). But beyond wanting more from big political and business actors, residents are looking to their fellow neighbors as well. About 57% of Houstonians think ordinary residents can be doing more to address climate change, while also holding themselves accountable to the same standard, as 55% felt there was more they could be doing personally.

Overall, these results show Houston-area residents want to see proactive steps taken to address the issue, while also not shuffling it off as “somebody else’s problem,” because everyone — especially leaders in local, state, and federal government as well as corporations and businesses, but also their neighbors and themselves — needs to take greater responsibility.

## Energy transition

Houston is the energy capital of the world, one that is being propelled toward divergent paths. On the one hand, Texas helped the United States set oil and gas production records in 2023, leading the state to collect a record \$23.6 billion in tax revenue and positioning the country to become one of the top producers globally, rivaling Saudi Arabia and Russia.<sup>9</sup> On the other hand, the pace of innovation is accelerating toward new energy sources and technologies that may shape the energy economy for the next century. Houston — even as an area that built such dominance in the oil and gas industry — seems poised to embrace these changes.

According to data from the 2024 Kinder Houston Area Survey, nearly three-quarters of area residents think Houston should prioritize developing technologies for the production of alternative energy sources such as wind, solar, and hydrogen. This sentiment is even stronger among younger adults, who will be the ones leading the charge in the decades to come.

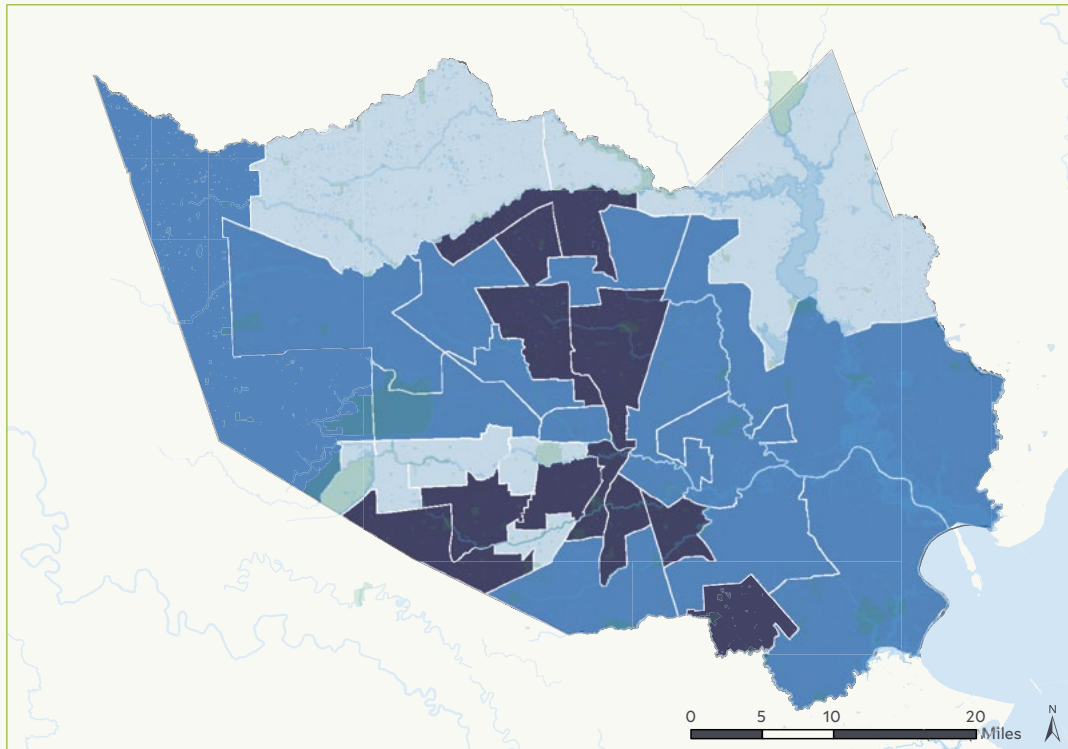
In October 2023, the U.S. Department of Energy selected a Houston-based consortium to serve as the Gulf Coast Hydrogen Hub, one of seven sites identified for federal investment in the infrastructure to produce “clean” hydrogen. This investment has huge economic upsides: Hydrogen production has the potential to contribute \$100 billion to the state’s gross domestic product and create 180,000 jobs.<sup>10</sup>

Meanwhile, Texas is a national leader in solar and wind power,<sup>11</sup> and Houston has its own ambitious goals, with

- 9 O&G Editors. (2023, December 19). S&P: US heads into 2024 producing more oil than any country in history. Retrieved January 22, 2024, from Oil & Gas Journal website: <https://www.ogj.com/general-interest/economics-markets/article/14302942/sp-us-heads-into-2024-producing-more-oil-than-any-country-in-history>
- 10 Center for Houston’s Future. (2022). Houston as the epicenter of a global clean hydrogen hub.
- 11 More than half of new U.S. electric-generating capacity in 2023 will be solar - U.S. Energy Information Administration (EIA). (2023, February 6). <https://www.eia.gov/todayinenergy/detail.php?id=55419>

MAP 4

**RESIDENTS' BELIEF THAT CLIMATE CHANGE WILL NEGATIVELY IMPACT THE QUALITY OF LIFE IN THEIR NEIGHBORHOOD VARIED ACROSS THE CITY AND COUNTY.**

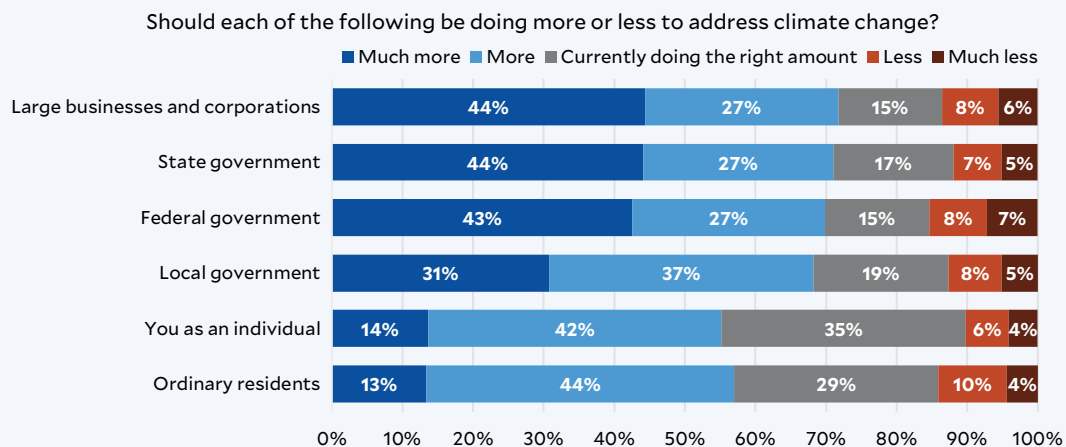


Percentage of respondents who think climate change will likely negatively impact the quality of life in their neighborhood

Less than 50%    50% to 60%    More than 60%

FIGURE 14

**ABOUT 7 IN 10 HOUSTONIANS SAY CORPORATIONS AND GOVERNMENTS SHOULD BE DOING MORE TO ADDRESS CLIMATE CHANGE.**

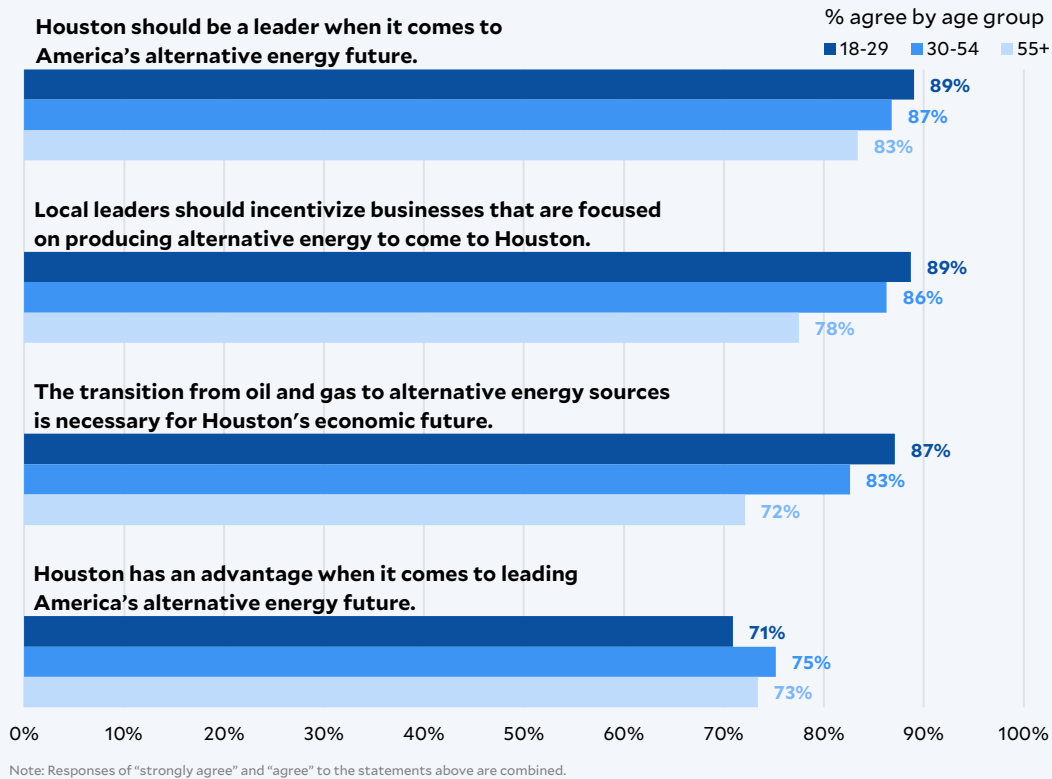


Note: Totals may not equal 100 because of rounding.



FIGURE 15

**CLEAR MAJORITIES — YOUNG ADULTS IN PARTICULAR — WIDELY AGREE THE HOUSTON REGION SHOULD BE A LEADER IN THE ENERGY TRANSITION.**



a former landfill in the city's Sunnyside neighborhood expected to be transformed into one of the largest urban solar farms in the country.

Taken together, the city and the region are making clear strides toward a new energy future — one that is expanding its use of alternatives and new technologies. When asked about their views, most residents saw growth in alternative energy as a necessary change that can be an opportunity for the region. Specifically, about 81% of residents believe the transition to alternative energy is necessary for Houston's economic future. A similarly large share of residents see this change as an opportunity for both economic growth and national leadership: About 85% agree local leaders should incentivize alternative energy businesses to come to Houston, and 87% think Houston should be a leader in America's alternative energy future. Young adults, in particular, see an opportunity

for Houston to be an alternative energy leader, think it is imperative for the area's economy that it transition from oil and gas to alternative energy, and would like to see incentives offered to businesses that will bring alternative energy to Houston (Figure 15).

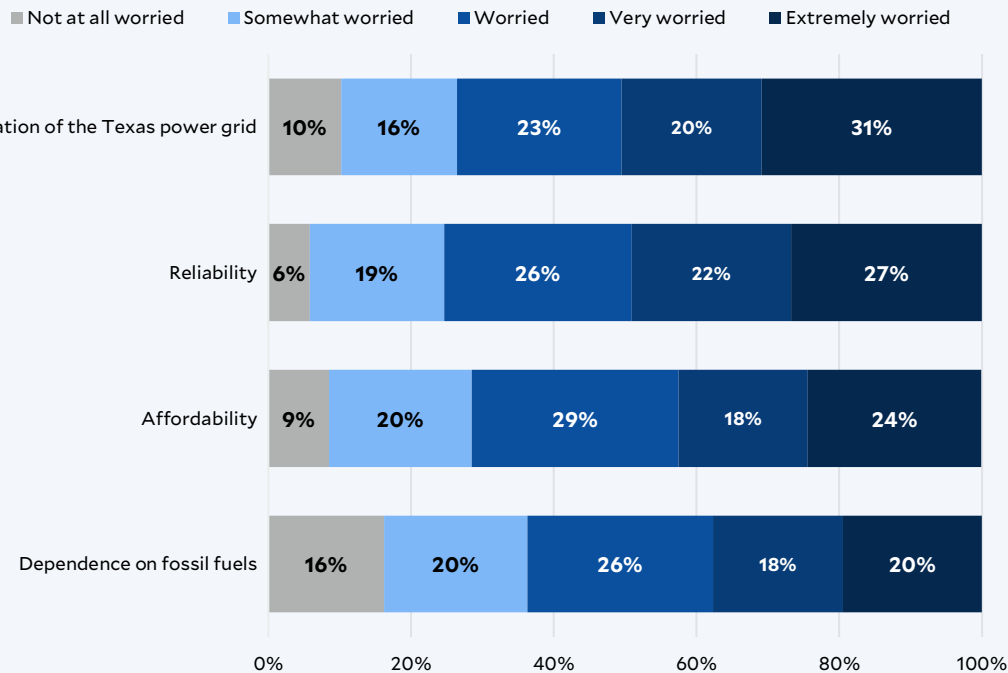
Given the significant leadership role Houston plays in the energy economy, 73% of respondents believe the city has an advantage when it comes to leading America's alternative energy future. This sentiment is shared across age groups.

This belief in and support for Houston's energy future is encouraging but must also be viewed within the context of a high degree of worry about the Texas energy sector. Three-quarters of Houstonians are "worried," "very worried," or "extremely worried" about its reliability (Figure 16). A similar proportion are "worried," "very worried," or "extremely worried" about the Texas

FIGURE 16

**ABOUT 3 IN 4 HOUSTON-AREA RESIDENTS ARE “WORRIED,” “VERY WORRIED,” OR “EXTREMELY WORRIED” ABOUT THE ISOLATION OF THE TEXAS POWER GRID AND ITS RELIABILITY.**

Thinking about the energy sector in Texas, how worried are you about each of the following:



grid being largely cut off from the rest of the country, and more than 70% are “worried,” “very worried,” or “extremely worried” about cost and want to make sure energy remains affordable.

## Artificial intelligence

### *Technology, AI, and the Houston economy*

With large language models, neural networks, and machine learning, the generative AI technology behind tools such as ChatGPT is raising new concerns about automation, job change, and the future of work. While previous forms of automation largely affected blue-collar manufacturing workers over the last century, the next generation of technological change could affect nearly every type of job. OpenAI’s own study of its capabilities across nearly 1,000 occupations found 80% of jobs could be affected, and about 1 in 5 workers

could see half of their day-to-day tasks enhanced or replaced by an AI technology.<sup>12</sup> As Houston prepares for the technological transformation to come, residents have widely varying attitudes about its impact.

According to data from the 2024 Kinder Houston Area Survey, about 28% of Houston-area residents believe that over the next 10 years, technology will mostly make people’s lives better, and only 8% think it will mostly make people’s lives worse. Another 10% say they are unsure of the impact advances in technology will have on the future, which means the majority of residents, about 55%, expect technology to make some people’s lives better and make other people’s lives worse.

<sup>12</sup> Eloundou, T., Manning, S., Mishkin, P., & Rock, D. (2023). GPTs are GPTs: An Early Look at the Labor Market Impact Potential of Large Language Models. arXiv.

### Exposure to and use of artificial intelligence in the Houston area

Knowledge of and exposure to AI varies greatly in the Houston area: About 29% of residents said they had seen, read, or heard about AI “a lot,” 37% said they had “some” exposure to it, 27% said they had “a little” exposure, and about 7% said they had seen, heard, or read “nothing at all” about it.

When it comes to the use of AI tools such as Alexa or Siri voice assistants at home, almost 37% of residents reported using them often or very often in their personal lives, and another 47% reported using them rarely or sometimes. Only 16% of residents — about 1 in 6 — said they never used these tools at home.

It was less common for residents to report using more advanced, generative AI tools such as ChatGPT or DALL-E. In fact, more than half (56%) of Houston-area residents said they never used generative AI tools in their personal lives, and only 11% reported using them

often or very often. Usage varied by age, as 41% of 18- to 29-year-olds said they used generative AI tools rarely or sometimes, compared to 34% of 30- to 54-year-olds and 23% of adults 55 or older (Figure 17).

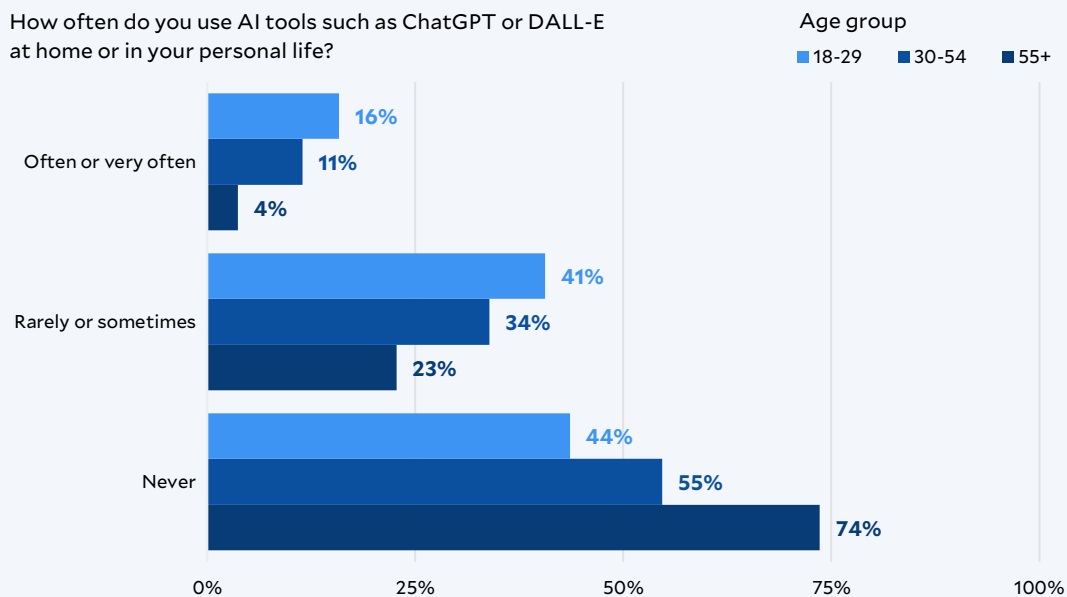
### Future of work and AI

According to a 2023 survey of 803 global companies representing more than 11.3 million employees worldwide by the World Economic Forum,<sup>13</sup> about 75% of companies said they planned to further integrate AI into their operations and daily routines, and this technology has already started impacting jobs across the Houston landscape. More than half (54%) of area residents working in the region said they use AI tools at work. Prevalence varied across industries: For example, about two-thirds of residents employed in

13 Di Battista, A., Grayling, S., Hasselaar, E., Leopold, T., Li, R., Rayner, M., & Zahidi, S. (2023, May). Future of jobs report 2023. In World Economic Forum, Geneva, Switzerland. <https://www.weforum.org/reports/the-future-of-jobs-report-2023>.

FIGURE 17

### PERSONAL USE OF ADVANCED ARTIFICIAL INTELLIGENCE TOOLS SUCH AS CHATGPT IS LIMITED ACROSS AGE GROUPS, ESPECIALLY OLDER ADULTS.



“professional and business solutions” said they used AI on the job, compared to less than half of residents working in construction; trade, transportation, and utilities; and manufacturing.

Almost half of Houston-area residents expect AI to have a major impact on the local economy, and another third expect it will have a minor impact. Only 3% do not expect AI to have any impact on the Houston economy. When asked whether the impact in the next 5 years will be good, bad, or mixed, the most common answer was mixed, with about 40% of residents thinking AI will equally hurt and help. One-quarter of residents said AI would help the Houston economy more than it would hurt it, while 1 in 7 said they expected the opposite. About 20% of residents were unsure what the impact of AI on the local economy would be.

In addition to AI’s impact on the Houston economy, nearly 6 in 10 residents expect it to have a major impact on workers in the Houston area, and another 3 in 10 expect a minor impact. When asked about what

impact AI will have on workers in the next 5 years, 44% said they expect it to equally help and hurt workers, 22% think it will hurt workers more than it helps, and 17% think it will help workers more than it hurts. Three percent do not think there will be an impact on workers, and 14% are unsure what the impact will be.

Unlike the widespread expectation that AI will have a major impact on the Houston economy as well as on workers generally, residents do not see it having that level of impact on themselves personally in the workplace. Only one-quarter of residents expect AI to have a major impact on them personally at work in the next five years, with another 45% expecting the impact to be minor — though that means about 7 in 10 residents see AI having some sort of impact on them personally. Expectations for AI to have a personal impact varied by industry, with 38% of residents in the leisure and hospitality industry expecting AI to have a major impact, compared to 19% of residents in the construction industry (Figure 18).

FIGURE 18

#### HOUSTON-AREA WORKERS IN LEISURE AND HOSPITALITY AND PROFESSIONAL AND BUSINESS SERVICES ARE MORE LIKELY TO ANTICIPATE A MAJOR IMPACT FROM AI.

In the next 5 years, how much impact do you think AI will have on you personally in the workplace?

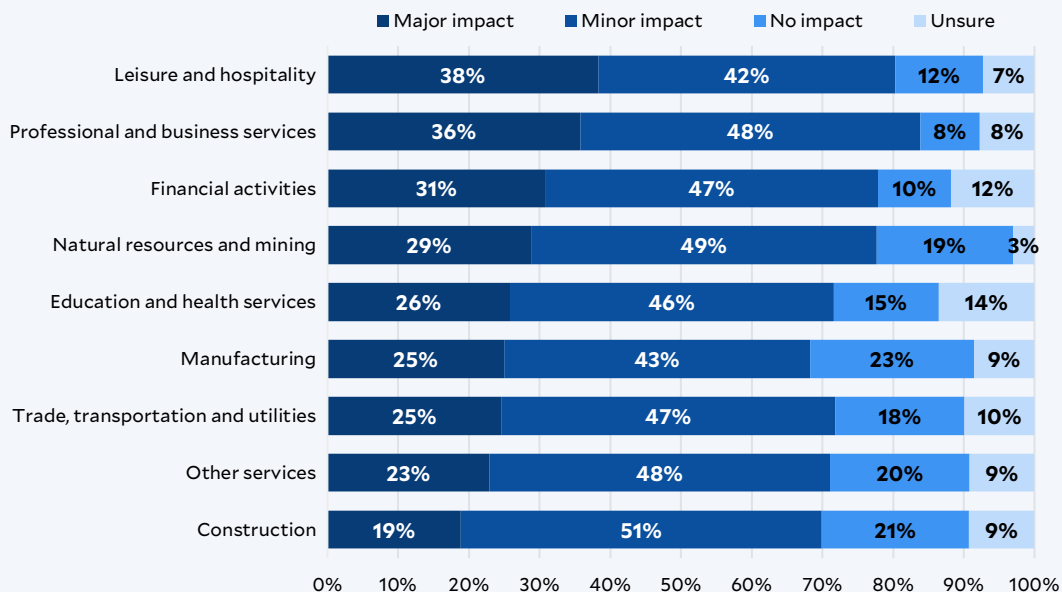
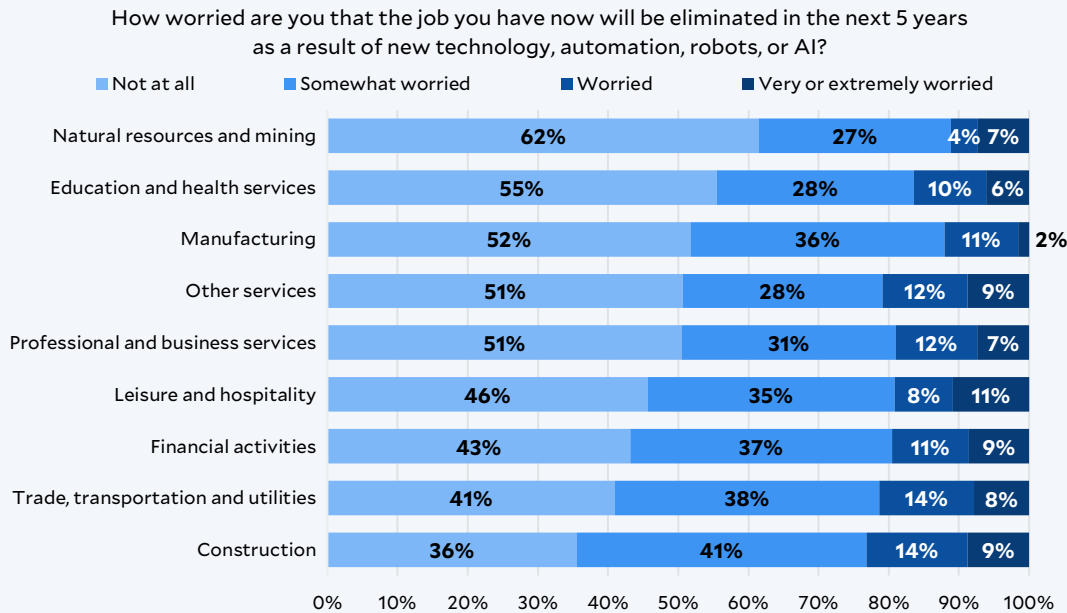


FIGURE 19

### MAJORITIES OF WORKERS IN SOME INDUSTRIES ARE NOT WORRIED ABOUT LOSING THEIR JOB BECAUSE OF AI OR AUTOMATION.



Sensing these potential impacts, Houston-area residents are seeing a need for new skill development, particularly for keeping up with new technology, automation, robots, or AI in the workplace. Nearly 70% said they expected to need to learn new skills at work to keep up with changing technologies. Residents currently working in construction (77%), natural resources and mining (76%), and financial activities (76%) were most likely to say they feel the need to learn new skills.

AI could eliminate some jobs entirely. Six in 10 residents expect it will eliminate more jobs in the area than it creates in the next 5 years. Another quarter expects AI will create as many jobs as it eliminates, meaning only 15% of Houston-area residents expect it to create more jobs than it eliminates.

Despite this, residents do not see their own jobs as threatened. Nearly half of those currently working said they are not at all worried their jobs will be eliminated by AI in the next 5 years. Another 33% said they were a little worried, and less than 20% were either worried, very worried, or extremely worried. Worry

about AI eliminating jobs varied by industry, with 62% of residents working in natural resources and mining saying they were “not at all” concerned that AI would eliminate their job, compared to only 36% of residents in the construction industry (Figure 19).

Even as the vast majority of Houston-area residents see their own jobs as relatively secure for the foreseeable future, 7% expressed being very worried or extremely worried their job would be eliminated by AI in the next 5 years. To put this in context, the U.S. Census Bureau estimates there were 2,355,465 people working in Harris County in 2022. Having 7% of them either very or extremely worried translates to roughly 174,000 people. Were those jobs to be eliminated, it would almost triple the unemployment rate in the area, raising it to a level only briefly seen at the onset of the COVID-19 pandemic. Even if these jobs are not eventually eliminated, the fact that 1 in 12 residents has a high level of worry about the long-term viability of their job points to a workforce needing reassurances or guidance regarding their future employment outlook.





## » Looking to the Future

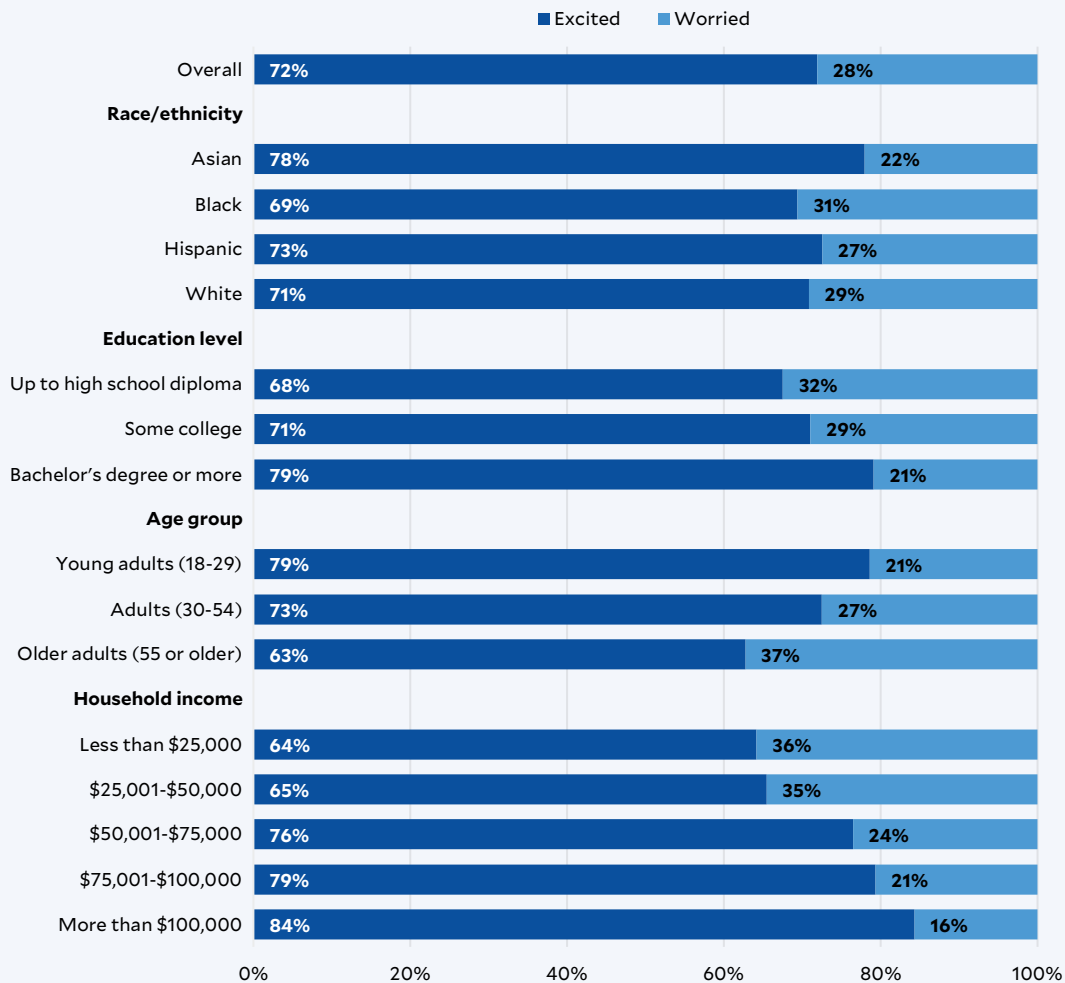
Climate change, energy transition, and AI in the workplace are but a few of the domains Houston will be grappling with in the decades to come. Each is daunting in its own right; when taken together, it becomes clear the region is being confronted by significant threats while also being presented with significant opportunities. Staring into this future, 7 in 10 area residents said they are excited for the new opportunities that will be available to them in the coming years, while 3 in 10 said they worry the rapidly changing city will leave them behind. Excitement for the future is widely shared across racial and ethnic groups, people with varying levels of income, and older and younger alike (Figure 20).

This widespread excitement should not be mistaken for blind optimism or ignorance about the challenges faced by the Houston area. In fact, when residents were asked if they think things will get better, worse, or stay about the same in Houston over the next 10 years, about one-third said they expect things to get better, about one-third said things would stay the same, and still another one-third said they expect things to get worse.

To complement the question about the “biggest problem” facing Houston today, residents were also asked what they think the biggest problem will be in 20 years. The first- and second-most commonly

FIGURE 20

**ACROSS EVERY DEMOGRAPHIC AND INCOME LEVEL, HOUSTONIANS EXPRESS MORE EXCITEMENT THAN WORRY ABOUT THEIR FUTURE.**



Note: Respondents were asked, "Thinking about the rapid pace of change in Houston, which of the following statements do you agree with more: 'I feel excited for the new opportunities I might have,' or 'I worry that I will be left behind.'"

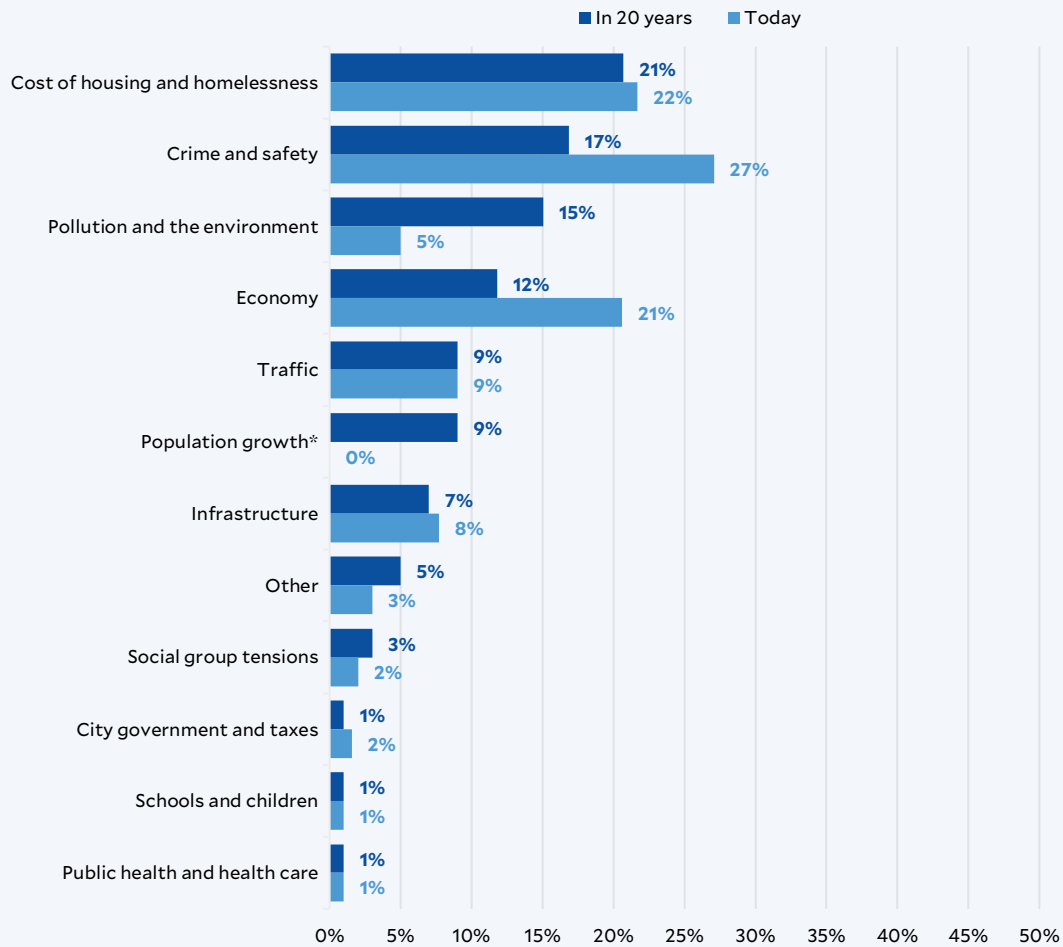
expected problems are the same as the first- and second-most commonly reported problems of today: housing affordability and crime and safety (Figure 21). About 21% of residents saw housing affordability as being the biggest problem in the future, while 17% of residents listed crime and safety. The third-most common problem for the future was pollution, environment, and flooding — 15% of residents identified this as the region's biggest looming challenge, three times as many as cited it as the "biggest problem" facing the Houston area in 2024.

When residents were asked to think about their ideal Houston, they described a city that leans into its current strengths. Nearly 73% said their ideal Houston is one where people of all races, faiths, and backgrounds feel safe and feel like they belong, and more than half said their ideal Houston is one that is a leader in the next generation of knowledge-economy jobs and industries. As the Houston of today becomes the Houston of tomorrow, nearly two-thirds of residents also said they wished the rest of Texas was more like Houston rather than the other way around.

FIGURE 21

**FEWER HOUSTONIANS SEE CRIME AS AN ISSUE 20 YEARS FROM NOW, WHILE HOUSING REMAINS A LONG-TERM CONCERN.**

What would you say is the biggest problem facing people in the Houston area?



\*Population growth appeared as a problem in 20 years with enough frequency to be classified as a new issue category.



## » Concluding Thoughts

**T**he 43<sup>rd</sup> annual Kinder Houston Area Survey provides an updated view of who Houston is, both in terms of where it's been as well as where it sees itself going. The same challenges that have weighed on the region over the last few years remain at the forefront of people's thinking: crime and safety, affordable housing, and the economy.

While the findings from this study cannot prescribe solutions, there are numerous actions that can be suggested. For example, residents continue to see crime and safety as a top concern, with residents in many neighborhood areas saying they would feel safer with a greater law enforcement presence. Police, constables, sheriffs, and other local agencies may be able to further curb the crime rate while also improving peo-

ple's perceptions of safety with more frequent patrols and greater engagement with communities.

Turning to the challenge of affordable housing, there is no consensus as to what is driving up costs, which points to the complexity of the problem. No single solution is going to resolve the issue, but its complexity also means there are multiple entry points for policies and programs to address it.

Houston's economy continues to leave many residents worried and behind, as nearly half are unable to come up with \$400 to cover an unexpected emergency expense. Figuring out ways to include more people in the region's prosperity will require increased investments in education — which area residents support — as well



as building upon awareness of the structural and systemic factors that create unequal opportunities. As long as a person's ZIP code is a predictor of their life outcomes, or the color of their skin is more important than the skills they've acquired or the effort they're willing to put forth in determining whether or not they get ahead, Houston's economy will remain sub-optimal. But there is an appetite for supporting the types of changes that will be critically important to optimize people and the economy as the region looks to the future.

In considering the future, Houston-area residents know that it is not a matter of if the next billion-dollar disaster will strike, but simply a matter of when. Residents anticipate climate change will likely affect them personally and will harm the region's economy. While the memories of storms like Hurricane Harvey may be fading, the work to shore up homes, communities, and infrastructure to withstand flooding and other adverse conditions caused by extreme weather continues to be urgently needed.

The energy transition is underway, and Houston is making investments that will situate it to be a leader — if not *the* leader — in alternative energy for the future. Area residents are ready for those investments and want to see Houston remain atop the energy sector for decades to come. These efforts will be under-

mined if fundamental concerns about energy reliability, isolationism, and affordability are not addressed. And regardless of state versus local politics, if officials fail to take action to address concerns about the Texas energy sector, untold billions of dollars will be taken out of the state economy, and ultimately the Houston area will miss out on the opportunity to develop crucial new technologies and innovations.

While forecasts of AI's impact on job and economic growth differ in their alarm, history provides a guide: Technological advances in the past 50 years — and automation in particular — have been a leading cause of wealth inequality.<sup>14</sup> Houstonians appear to be of two minds about AI — 60% say it will result in job losses in the next 5 years, but half also say their own jobs are safe over the same time period.

For all of the uncertainties and all of the potential existential threats, the 2024 Kinder Houston Area Survey adds evidence that residents remain steadfast and true to a spirit that permeates the region — a spirit that turns from the past and looks eagerly into the future, awaiting the Houston of tomorrow.

14 Acemoglu, D., & Restrepo, P. (2021). Tasks, automation, and the rise in US wage inequality. National Bureau of Economic Research. <https://doi.org/10.3386/w28920>



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The Kinder Institute for Urban Research builds better cities and improves lives through data, research, engagement and action.



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