

ANNUAL REPORT 2025

Aligning Talent, Industry, and Opportunity



MISSION

We help employers meet their workforce needs and individuals build careers so both can compete in the global economy

VISION

To strengthen business and industry, drive the economic growth of our region, and create thriving, inclusive communities where everyone has opportunities to earn, learn, and prosper.

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MESSAGE FROM THE BOARD CHAIR

The Gulf Coast Workforce Board serves a region that drives a significant share of the state's economic output and reflects its greatest diversity. Our responsibility is to advance a public workforce system aligned with that scale: disciplined in governance, responsive to labor market conditions, and focused on long-term economic mobility.

The past year demonstrates steady strengthening of that system. Workforce investments have been guided by data, partnerships across thirteen counties have deepened, and coordination among employers, educators, and service providers has become more deliberate. Effective workforce development requires more than activity; it requires alignment and accountability.

Economic mobility remains at the center of this work. Stable employment, access to training, and the

ability for parents to participate in the workforce shape the economic trajectory of families across our region. The decisions made by this Board influence not only program performance, but the broader competitiveness of the Gulf Coast economy.

This report reflects collective effort, from Board members and staff to employers, county leaders, training providers, and community partners. Sustaining progress requires continued collaboration and steady oversight. The Board remains committed to ensuring that the workforce system operates with transparency, measurable impact, and long-term focus.

Work strengthens families, businesses, and communities. The investments we make today reinforce the economic foundation of the Gulf Coast for the years ahead.



A handwritten signature in blue ink, appearing to read 'Mark Guthrie', written in a cursive style.

MARK GUTHRIE

Gulf Coast Workforce Board Chair

LETTER FROM THE EXECUTIVE DIRECTOR

The past year marked an important period of progress for the Gulf Coast workforce system. In 2025, we moved from planning to implementation, translating the goals of our five-year strategic plan into operational change across the region.

We began by strengthening the foundation of the workforce system. The full integration of the one-stop service model brought employer engagement and career services into closer coordination, making services easier to navigate and more responsive to hiring demand. We also clarified processes, strengthened collaboration among partners, and reduced barriers that can slow progress for both job seekers and businesses. The focus was on building a system that is more connected, easier to navigate, and designed to meet people where they are.

At the same time, we advanced several priority strategies outlined in the strategic plan. This included expanding our focus on apprenticeships, launching a career dashboard that connects career exploration with real-time labor market

data, and introducing Hire Gulf Coast Youth, an initiative connecting young people directly to paid work experiences aligned with industry demand.

Equally important in 2025 was increasing visibility of workforce services. Through the Complete Guide of Services, Workforce Solutions News, expanded digital engagement, and a stronger media presence, we made the system more transparent and easier to navigate. A workforce system cannot serve those who do not know it exists. Increasing awareness is not ancillary to our mission—it is fundamental to it.

Economic mobility remains our long-term objective. Childcare investment, which supports tens of thousands of working families across the region, continues to function as essential workforce infrastructure—enabling parents to participate in the labor market and helping employers maintain a stable workforce.

Together, these efforts are strengthening the workforce system and positioning the Gulf Coast region for long-term economic opportunity.



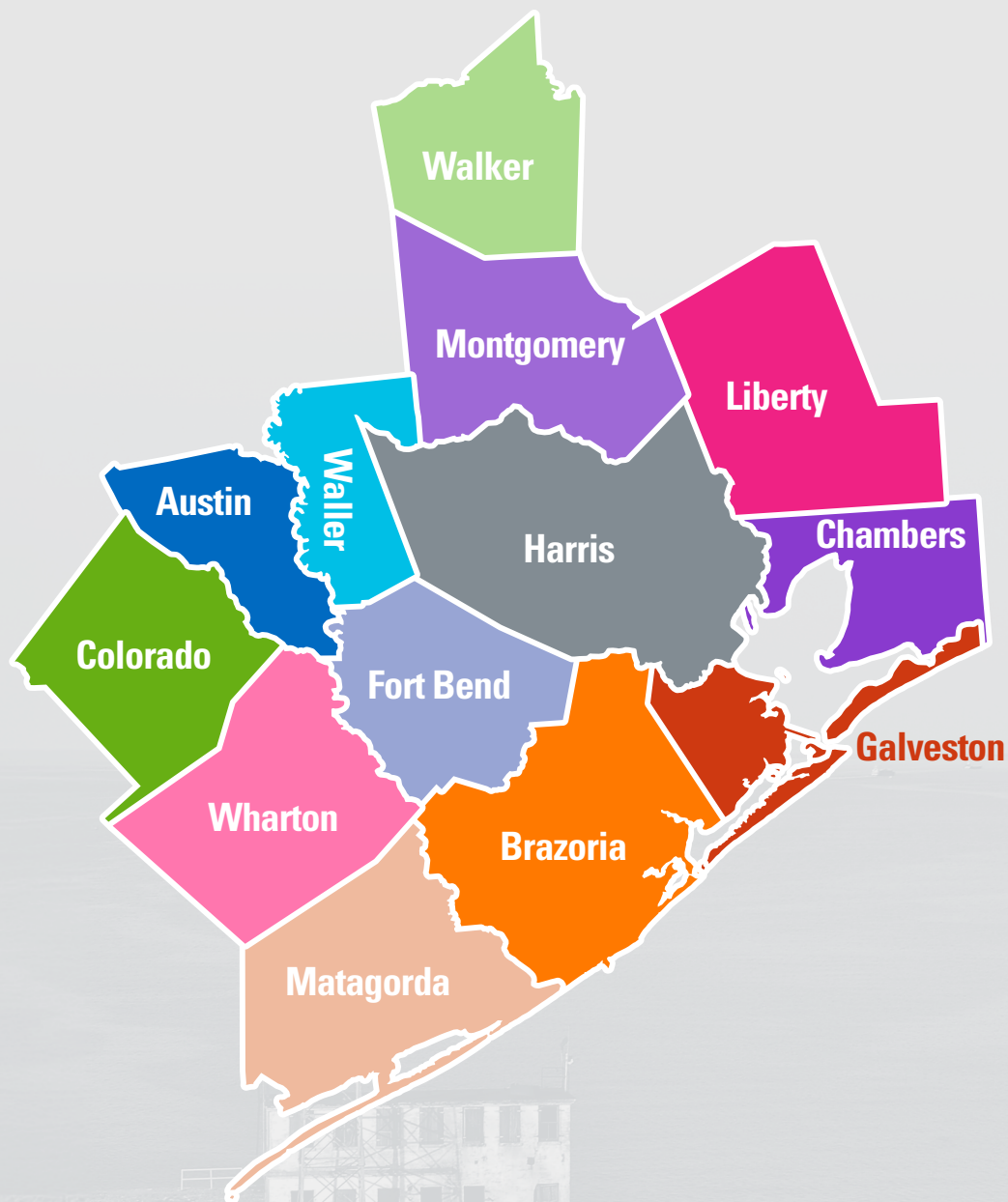
A stylized, handwritten signature in blue ink, consisting of several loops and a long horizontal stroke.

JULIET K. STIPECHE

Gulf Coast Workforce Board Executive Director

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The GCWB and the Gulf Coast Region



The Gulf Coast Workforce Board leads the public workforce system for a 13-county region in Southeast Texas that is home to more than seven million residents and the second largest labor market in the state. The region includes Harris, Fort Bend, Brazoria, Galveston, Montgomery, Liberty, Chambers, Wharton, Matagorda, Walker, Waller, Austin, and Colorado counties, a geography spanning dense urban centers, fast-growing suburban communities, coastal areas, and rural counties.



Our region is majority-minority, multilingual, and among the most demographically diverse labor markets in the country.

With a large and growing Hispanic population, a significant immigrant workforce, and wide variation in educational attainment and income levels, the Gulf Coast presents workforce development challenges and opportunities that are distinctly its own. Those demographics shape the demand for services, the range of training and support needs, and the populations the workforce system must be designed to reach.

This is also one of the most economically significant regions in the country. The Gulf Coast economy supports a workforce numbering in the millions and includes globally connected industries such as energy, healthcare, advanced manufacturing, life sciences, aerospace, logistics and transportation, maritime trade, petrochemicals, construction, and technology. At the same time, the region reflects wide income variation and uneven access to opportunity. Population growth, industry transformation, and shifting skill demands continue to reshape the regional labor market.

As the designated public workforce authority for the region, the Gulf Coast Workforce Board sets the strategic direction for workforce development across all 13 counties. It aligns workforce investments with labor market data and employer demand, oversees service delivery, and coordinates partnerships among educational institutions and industry. This is system-building work, so residents can connect to services more easily, employers can access talent more effectively, and public investment supports measurable outcomes. Its role is not limited to funding programs; it strengthens workforce infrastructure itself, improving how services are delivered, increasing access to opportunity, and aligning talent development with the long-term needs of the regional economy.



The Board serves the entire workforce ecosystem: residents entering the workforce for the first time, adults seeking career advancement or retraining, individuals navigating barriers that affect workforce participation, and young people exploring career pathways. It also serves employers of every size, from small businesses to multinational firms, that depend on a skilled and reliable workforce to compete and grow in a changing economy.



In a region defined by both economic strength and structural barriers to mobility, workforce development functions as economic infrastructure.

The Board's responsibility is to make certain the workforce system is responsive, accessible, and positioned to support continued regional growth while expanding pathways to upward mobility for residents across the Gulf Coast.



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Our Strategic Direction: The 2024-2029 Plan

INNOVATE. CONNECT. THRIVE.

In October 2024, the Gulf Coast Workforce Board adopted a new strategic plan, ***Innovate. Connect. Thrive.***, to establish its priorities and direction over the next five years. 2025 represents the first full year of implementation.

Developed through a comprehensive year-long planning process that included board leadership, employers, education partners, workforce providers, frontline staff, and community stakeholders, the plan aligns the regional workforce system with current economic conditions, labor market realities, and long-term growth priorities. Informed by what that process made clear, including the barriers people face in finding work, industry concerns about skilled talent, and a widespread lack of awareness about available resources, it establishes a framework for more intentional, results-driven action across the region.

This plan marks a shift from a compliance-based approach to one focused on engagement, tangible results, and long-term regional impact. It is grounded in deeper alignment with employer demand, stronger partnerships, and a more responsive, visible presence across all 13 counties - meeting people where they are.

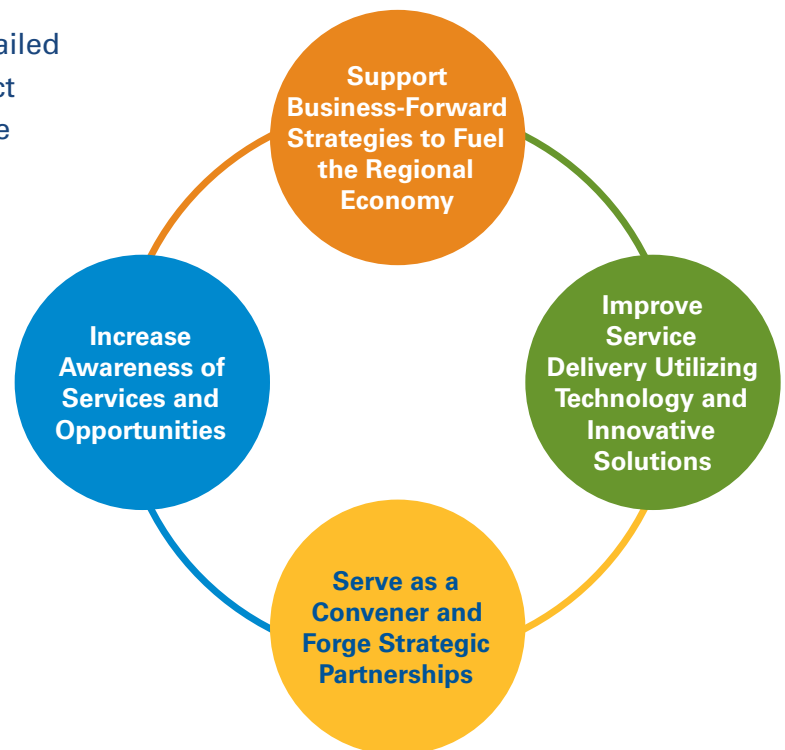




The plan established four strategic goals that guide everything the Board does going forward:

The initiatives, system improvements, and communications efforts detailed throughout this report reflect direct progress toward these four goals. Together, they mark a shift toward greater alignment with regional industry demand, stronger coordination across partners, expanded access to information and services, and a more responsive workforce system across the Gulf Coast region.

FOUR STRATEGIC GOALS



wrksolutions.com/about-us/plans

3

Workforce Trends Shaping the Region

Regional Economy at a Glance

The Houston metropolitan economy remains one of the largest labor markets in the United States, supported by a broad industrial base and sustained population-driven demand. As of December 2025, the region's civilian labor force stood at approximately 3.91 million workers, with an unemployment rate of 4.2 percent, slightly above the national average but consistent with Houston's position as a fast-growing market that continually absorbs new entrants.

Total nonfarm employment reached 3.49 million jobs, a year-over-year increase of approximately 14,800 jobs (0.4 percent). While positive, this reflects the broader normalization of labor demand occurring nationwide. Houston continues to add jobs, but at a slower and more sustainable rate than during the post-pandemic recovery period.

Employment growth was uneven across sectors. Trade, transportation, and utilities added 6,300 jobs, leisure and hospitality and construction each expanded, and health care remained the region's primary long-term growth engine. Professional and Business Services posted the largest annual decline at 18,500 jobs as companies reduced hiring following expansion in 2022-2023.

Despite cyclical softness, long-term industrial prospects remain favorable. Several major employers, including Tesla, Eli Lilly, and Foxconn, announced plans for new advanced manufacturing facilities in the region, reinforcing the region's strength in logistics, energy infrastructure, and workforce capacity.

Small businesses predominate in the regional economy: establishments with fewer than 20 employees comprise 84 percent of all employers. At the same time, large employers in health care, energy, logistics, and petrochemicals anchor total employment and drive a substantial share of regional output.

Major Labor Market Trends

Houston closed 2025 in a labor market that shifted in character. Hiring decelerated sharply from the prior year's pace, and the unemployment rate's modest decline reflected workers leaving the labor force rather than stronger job creation.

Looking ahead, Houston is positioned for moderate growth in 2026, supported by population growth, health care demand, logistics activity, and infrastructure investment. The region enters the year no longer in rapid expansion, but still fundamentally resilient.

HIRING TRENDS

Beyond the Unemployment Rate

Houston's unemployment rate dipped to 4.2 percent in 2025, but the headline number tells only part of the story. The decline reflected workers leaving the labor force, not an acceleration in job creation. Hiring pulled back, layoffs remained limited, and the regional Workforce Solutions Index stayed below equilibrium. What emerged was a "low-hire, low-fire" labor market: one where demand has softened but the floor has held. Houston is not in retreat, it has normalized.

Parker Harvey, Chief Economist

Retirement-Driven Labor Market Pressure

The aging of the Baby Boomer generation is no longer a distant projection for the Gulf Coast region- it is now visible in our labor force data. As more workers reach retirement age in 2025, employers across our 13 counties are contending with the loss of experienced talent in roles that are not easily backfilled.

In a region anchored by complex, capital-intensive industries, workforce depth matters. The pace and concentration of retirements will shape hiring pressure, wage dynamics, and the demand for skilled talent over the next several years.

Ron Borski, Senior Labor Market Analyst

AI and the Changing Nature of Work

Artificial Intelligence is reshaping hiring, skills demand, and workforce strategy in real time. Employers report a widening AI skills gap among mid-career professionals and are increasingly treating AI fluency as a baseline competency. AI is also transforming recruitment itself - from candidates using generative tools to draft resumes to employers deploying automated screening systems. What remains unclear is whether AI is directly driving job loss, which segments of the workforce are most affected, or whether broader economic uncertainty is the dominant factor.

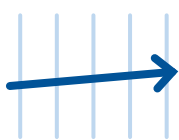
Mohammad Ahmadizadeh, Principal Data Analyst

Total Nonfarm Employment

2025 FULL YEAR GROWTH AS OF DECEMBER 25

Non-seasonally adjusted

14,800



Slowest YOY (year over year) job growth since February 2017 excluding pandemic



Typical year for Houston during economic expansions is 60,000 to 65,000 jobs

GULF COAST WORKFORCE BOARD · LABOR MARKET INTELLIGENCE

2025 Houston Area Job Growth and Losses by Sector

Total nonfarm employment change: +14,800 jobs

GROSS GAINS

39,700

TOP SECTORS

- 25% Health Care & Social Assistance
- 12% Accommodation & Food Services
- 12% Transportation, Warehousing & Utilities
- 9% State Government
- 9% Local Government

GROSS LOSSES

24,900

TOP SECTORS

- 37% Professional, Scientific & Technical Service
- 29% Administrative Support & Waste Management

Two-thirds of 2025 gross growth came from 5 sectors
Two-thirds of losses came from just 2

Source: Texas Workforce Commission · Gulf Coast Workforce Board Labor Market Intelligence ·
Not seasonally adjusted

4

County
Snapshots

County-level data reports

COUNTY ECONOMIC DATA

Note for all educational attainment rates:

Data is for population age 25 and over.

Source: U.S. Census Bureau, American Community Survey 2019–2023 5-year estimates, Table S1501.

Median household income data is derived from the U.S. Census Bureau American Community Survey (ACS) 2019–2023 5-year estimates. Major industries and employers reflect regional economic conditions identified through the Gulf Coast Workforce Board Strategic Plan (2024–2029) and supporting economic development data sources.

**Austin****Population:** 32,546**Median Age:** 42**Median household income:** \$75,994**Educational attainment rate:** 86.2%
high school graduate; 25.1% Bachelor's degree or higher**Unemployment rate:** 4.0%**Major Industries:** Manufacturing, retail trade, educational services, and construction**Major Employers:** Bellville ISD, Austin County Government, local manufacturing and agricultural employers**Brazoria****Population:** 413,224**Median Age:** 37**Median household income:** \$95,155**Educational attainment rate:** 89.2%
High school graduate; 33.1% Bachelor's degree or higher**Unemployment rate:** 4.5%**Major Industries:** Health Care & Social Assistance, Manufacturing, and Educational Services**Major Employers:** Dow Chemical Company, Kelsey-Seybold Clinic, UTMB Health, Freeport LNG**Chambers****Population:** 56,179**Median Age:** 35**Median household income:** \$108,114**Educational attainment rate:** 88.6%
High school graduate; 21.9% Bachelor's degree or higher**Unemployment rates:** 5%**Major Industries:** Manufacturing, Construction, Education, and Healthcare**Major Employers:** Enterprise Products Partners, NRG Energy, Air Liquide, ExxonMobil Baytown operations



Colorado

Population: 21,475

Median Age: 44

Median household income: \$68,554

Education attainment rate: 89.6% High school graduate; 22.9% Bachelor's degree or higher

Unemployment rate: 3.4%

Major Industries: Health Care & Social Assistance, Retail Trade, and Manufacturing

Major Employers: Rice Medical Center, Colorado County Government, regional manufacturing employers



Fort Bend

Population: 958,434

Median age: 37

Median Household Income: \$113,409

Education attainment rate: 91.9% High school graduate; 50.2% Bachelors or higher

Unemployment rate: 4.1%

Major Industries: Education and Public Service, Healthcare

Major Employers: Fort Bend ISD, Memorial Hermann, Houston Methodist Sugar Land, Amazon, FedEx



Galveston

Population: 367,407

Median age: 39

Median household income: \$85,348

Education attainment rate: 89.9% high school graduate; 34.8% Bachelor's degree or higher

Unemployment rate: 4.2%

Major Industries: Education, Healthcare, Tourism, Hospitality, Maritime

Major Employers: University of Texas Medical Branch (UTMB), Port of Galveston, American National Insurance Company



Harris

Population: 5,009,302

Median age: 34

Median household income: \$73,104

Education attainment rate: 82.5% High school graduate; 34.2% Bachelor's degree or higher

Unemployment rate: 4.3%

Major Industries: Energy and Petrochemicals, Healthcare, Construction, Aerospace

Major Employers: ExxonMobil, Shell, Texas Medical Center institutions, NASA Johnson Space Center, United Airlines



Liberty

Population: 115,042

Median age: 33

Median household income: \$64,773

Education attainment rate: 77.8% High school graduate; 11.9% Bachelor's degree or higher

Unemployment rate: 5.3%

Major Industries: Construction, manufacturing, and retail trade

Major employers: Liberty ISD, Cleveland ISD, Walmart Distribution operations, local logistics employers



Matagorda

Population: 36,391

Median age: 37

Median household income: \$55,174

Education attainment rate: 81% High school graduate; 22.2% Bachelor's or higher

Unemployment rate: 5.7%

Major Industries: Health care and social assistance, retail trade, education services

Major Employers: South Texas Project Nuclear Generating Station, Tenaris Bay City, Matagorda Regional Medical Center



Montgomery

Population: 749,613

Median age: 37

Median household income: \$97,266

Education attainment rate: 90.3% High school graduate; 38.8% Bachelor's degree or higher

Unemployment rate: 3.8%

Major Industries: Energy, Healthcare, Education, Advanced Manufacturing, Logistics

Major Employers: ExxonMobil (The Woodlands Campus), Chevron Phillips Chemical, Memorial Hermann, Houston Methodist, Lone Star College



Walker

Population: 83,722

Median age: 37

Median household income: \$49,862

Education attainment rate: 84.5% High school graduation; 21.6% Bachelor's degree or higher

Unemployment rate: 3.8%

Major Industries: Education, Public Administration, Retail Trade, Oilfield Services

Major Employers: Texas Department of Criminal Justice, Sam Houston State University, Walmart, H-E-B, Weatherford International



Waller

Population: 65,109

Median age: 31

Median household income: \$76,135

Education attainment rate: 84.3% High school graduate; 27.9% Bachelor's degree or higher

Unemployment rate: 4.9%

Major Industries: Manufacturing, Education, Logistics, Agriculture

Major Employers: Daikin Texas Technology Park, Prairie View A&M University, Grundfos, MAN Energy Solutions



Wharton

Population: 42,035

Median age: 38

Median household income: \$66,100

Educational attainment rate: 85.5% High school graduate; 20.7% Bachelor's degree or more

Unemployment rate: 4.3%

Major Industries: Agriculture, Oil & Gas, Manufacturing, Energy Production

Major Employers: Wharton County Junior College, Prairie Switch Wind Energy Project employers, agricultural producers

5

Impact



Career Services

Assisted over

55,000 individuals



Quality Early Education

Provided child care scholarships for approximately

51,000 children



Employer Engagement

Served over

13,000 employers



Youth Services

Served over

24,000 young people



Adult Education & Literacy

Served over

6,000 students



Financial Aid

\$9.6M in training scholarships to

3,000+ individuals

\$650K+ in support services to

2,400+ Individuals



The Strategic Plan In Action

GOAL: SUPPORTING BUSINESS-FORWARD STRATEGIES

Aligning Talent with Industry Demand

The GCWB is building a workforce system designed not just to respond to employer demand, but to anticipate it, strengthening the Gulf Coast region's long-term economic competitiveness. To support informed career exploration and workforce investment, the GCWB has developed a regional High-Skill, High-Growth Career Dashboard, turning data into direction. Built specifically for our 13-county region, the tool allows users to:

- Explore more than 600 occupations
- Review projected job growth and annual openings
- Compare entry-level, median, and experienced wages
- Understand education and training requirements
- Identify apprenticeship pathways
- See top employing industries and key skill sets



High Skills tool

These *High-Skill, High Growth* occupations are scholarship-eligible through approved training providers and must meet clear criteria, including:

1. Wages above the regional median;
2. Strong projected growth rates;
3. Defined education and training pathways;
4. Alignment with employer demand.

The High-Skill, High-Growth list is reviewed and updated annually to reflect regional labor market conditions. The **2025 Targeted Industry List** includes 52 industries, including the addition of Scientific Research & Development Services to support growth in biotechnology, nanotechnology, and engineering. The list was also revised to lower the share of occupations requiring a bachelor's degree from 65 to 51 percent, reflecting strong regional demand for middle-skills credentials and training.

Designed for middle and high school students while remaining robust for counselors and workforce professionals, the dashboard pairs accessible career exploration with real labor market data, helping students and job seekers make decisions aligned with verified regional industry demand.



APPRENTICESHIPS WORK!

Workforce Solutions
GULF COAST

Apprenticeships Work!

In 2025, we launched ApprenticeshipsWork!, a regional effort to increase employer participation in apprenticeship and expand earn-and-learn pathways across the Gulf Coast. The program advances Registered Apprenticeships, Texas Industry Recognized Apprenticeships (TIRAs), and pre-apprenticeships across priority industries including healthcare, construction, manufacturing, information technology, logistics, education, maritime, and other sectors critical to the regional economy. Apprentices begin earning immediately and progress through defined skill milestones. Upon completion, program participants earn a nationally recognized credential backed by the U.S. Department of Labor.

Apprenticeships Work! supports employers in creating and expanding programs that combine paid, structured on-the-job learning with related classroom instruction aligned to industry standards and workforce priorities. Apprenticeship is now a primary strategy for developing skilled talent aligned with regional industry demand.

TEACHER APPRENTICESHIPS

In November 2025, the Career Pathways team proudly hosted an education panel at the Houston City College Apprenticeship Conference. The discussion featured leaders from Aldine ISD and the University of Houston–Downtown, who shared valuable insights on advancing teacher apprenticeships and strengthening career pathways.



GOAL: SERVE AS A CONVENER AND FORGE PARTNERSHIPS

REGIONAL ROUNDTABLE Matagorda and Wharton Counties

In March 2025, the Gulf Coast Workforce Board convened regional leaders in Matagorda County for a roundtable hosted in partnership with the Bay City Chamber of Commerce. The session brought together representatives from Matagorda and Wharton counties, including the Mayor of Bay City, the County Judge, leadership from Wharton County Junior College, major employers such as South Texas Nuclear Plant and Tenaris, chamber representatives, educators, community partners, and workforce stakeholders.

Executive Director Juliet Stipeche presented the newly adopted five-year strategic plan and outlined its priorities for strengthening workforce alignment in Matagorda and Wharton counties. The presentation was followed by a facilitated discussion focused on area workforce needs, industry hiring challenges, education and training alignment, and opportunities for more robust partnerships with the Board.

This roundtable reflects the Board's strategic goal of serving as a regional convener, bringing employers, educators, and public leaders together to strengthen coordination and advance shared workforce priorities across counties.





REGIONAL ROUNDTABLE

Harris County

In April 2025, the Gulf Coast Workforce Board hosted a second regional roundtable in Harris County, bringing together more than 85 leaders from the Houston area. Employers, chamber representatives, economic development directors, K–12 and higher education partners, local elected officials, community-based organizations, Board members, and staff gathered to discuss workforce priorities and regional needs.

The conversation centered on the Board’s five-year strategic plan and the work already underway to implement it. Participants heard updates on initiatives such as Hire Gulf Coast Youth and apprenticeship efforts. Board Chair Mark Guthrie and Executive Director Juliet Stipeche led a facilitated discussion on hiring challenges, industry trends, and opportunities to strengthen collaboration across the region.

This convening broadened engagement across the region’s largest labor market and reinforced the Board’s role in bringing partners together to address shared workforce challenges across the Gulf Coast.

GOAL: IMPROVE SERVICE DELIVERY USING TECHNOLOGY AND INNOVATIVE SOLUTIONS

ONE-STOP SERVICE MODEL

Making Workforce Services Easier to Access and Use

In 2025, the Gulf Coast Workforce Board and Workforce Solutions Gulf Coast strengthened the way services are delivered by fully integrating the one-stop career model. For job seekers and employers, that means a simpler, more connected experience. Career services and employer engagement now operate together within each workforce center, aligning job seeker preparation with real-time hiring needs and making it easier for employers to connect with qualified talent.

The changes are visible in how people experience the system. Workforce on Wheels extends one-stop services beyond traditional office settings, meeting residents in their own communities, while co-located satellite sites bring those same services closer to where people live, including libraries and other community locations. Inside our centers, teams work across functions so job seekers receive coordinated guidance and employers have a single, streamlined point of contact for recruiting, training

partnerships, and workforce solutions. This shift also included a geographic realignment of service areas into north, east, and west regions, allowing teams to respond more effectively to local economic conditions while maintaining consistent service standards across the region.

We also strengthened our support center operations, including improvements to scholarship processes and eligibility coordination, so individuals can move more quickly from assessment to training. These updates reduce delays, clarify next steps, and help people access the resources they need without unnecessary barriers. At the same time, employers benefit from a more organized and responsive talent pipeline — one informed by data, aligned with industry demand, and coordinated across the region. Together, these improvements reflect a practical commitment to making workforce services more responsive, more accessible, and easier to use.

GOAL: INCREASE AWARENESS OF SERVICES



Complete Guide Of Services

In 2025, the Board introduced a landmark resource: the region's first-ever complete catalog of its services. Designed to bring the strategic plan to life, the Complete Guide of Services captures the full scope of what Workforce Solutions offers all in one place, from hiring support and job training to Adult Education and Literacy, registered apprenticeships, career pathways, and disaster resources.

One of the most powerful features is the career pathways appendix, which maps out more than 120 high-demand occupations in our region and shows the steps needed to reach them. For young people starting out, mid-career workers looking to retrain, or employers seeking to understand how talent moves through the pipeline, this visual roadmap provides clarity on where opportunity lies and how to get there.



Designed to be both practical and approachable, the guide organizes programs and resources with clear instructions and links that make it simple for anyone to find what they need. A job seeker can discover training options and support services. An employer can quickly learn about recruitment and hiring assistance. A career office staff member can use it to ensure consistent information is shared across the region. In short, it is a tool that connects people to opportunity with less frustration and more confidence.

The guide directly advances one of the strategic plan's core priorities: increasing awareness of services across the region. Too often, residents and employers don't realize just how much support Workforce Solutions can provide. By making the system transparent and accessible in this way, the guide positions Workforce Solutions not just as a service provider, but as the region's trusted workforce navigator.



Guide of Services

7

Economic Mobility and Workforce Participation

Child Care Financial Assistance

Gulf Coast Region

Early Education

13 Counties

FY2025

\$321.4M

TOTAL INVESTMENT

28,562

FAMILIES SUPPORTED

47,428

CHILDREN SERVED

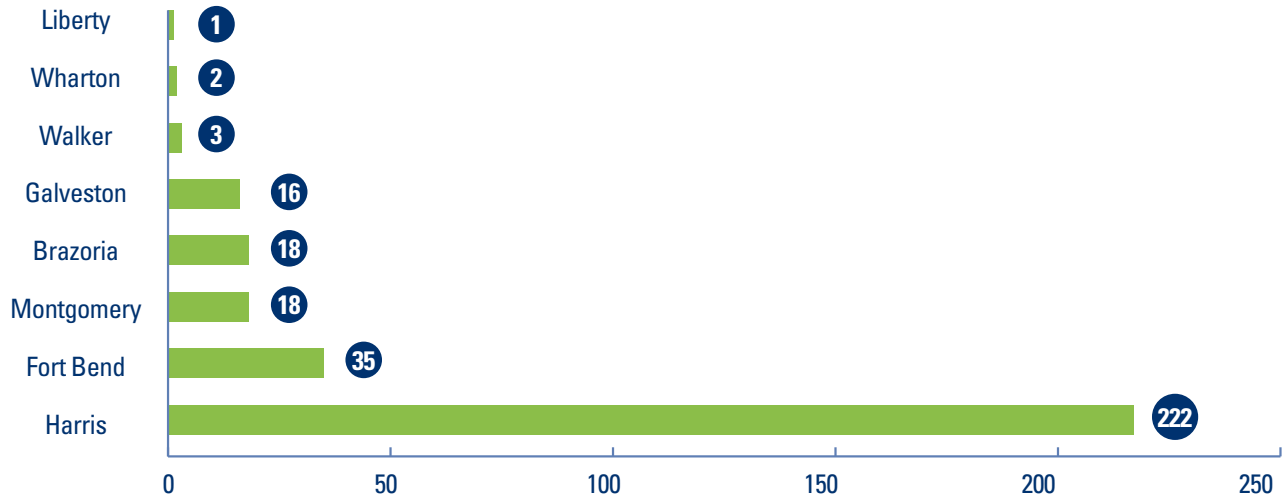
Source: Gulf Coast Workforce Board · FY2025 Data

Community Investment by County

Total dollars invested in child care financial assistance

FY2025

Values shown in \$M (millions)



Source: Gulf Coast Workforce Board · FY2025 Data

County-by-County Summary

Early Childhood Education

13 Counties

FY2025

COUNTY	INVESTMENT	CHILDREN SERVED	FAMILIES SUPPORTED
Harris	\$222,158,032.74	31,639	18,780
Fort Bend	\$35,319,127.49	5,352	3,142
Brazoria	\$18,166,127.86	2,876	1,768
Montgomery	\$18,128,664.03	3,116	2,026
Galveston	\$16,685,701.47	2,647	1,702
Walker	\$3,156,407.97	472	318
Wharton	\$2,474,819.88	346	190
Matagorda	\$1,323,425.46	205	130
Liberty	\$1,203,529.06	258	172
Austin	\$1,037,978.54	169	98
Waller	\$ 778,347.20	151	98
Colorado	\$533,748.08	98	65
Chambers	\$482,572.21	99	73
Total	\$321,448,482.00	47,428	28,562

Source: Gulf Coast Workforce Board · FY2025 Data

Childcare and Economic Mobility

For working families across the Gulf Coast region, the distance between economic instability and a stable career often comes down to a single question:

Who is watching the children?

This is not an abstract concern. It shows up in the data, in the waitlists, and in the daily reality of families across all 13 counties. When a parent cannot find or afford childcare, the consequences ripple outward to that household's income, to employers who need reliable workers, and to the regional economy that depends on both.

The Numbers Behind the Need

One in five Houstonians live below the poverty line. The Houston metropolitan area has the highest share of young people ages 16 to 24 who are neither working nor in school among the nation's largest cities. It has also made the least progress of any major metro in reducing that share over the past decade. These patterns are not disconnected from childcare. They are, in significant part, downstream of it.

THE SCALE OF UNMET NEED

28,000 FAMILIES
on the waiting list in the
Gulf Coast Region

485,000
CHILDREN
eligible statewide but not
receiving help

\$7.59 BILLION
lost annually by
Texas employers to
absenteeism and turnover
when workers cannot
secure stable childcare.

Childcare in this region costs, on average, more than \$1,100 a month for an infant - more than most families pay in rent. For a single parent, that figure can represent 39 cents of every dollar earned. At those prices, childcare is not a budget line-item families can absorb. It is a threshold that determines whether work is financially viable at all.



Access to affordable childcare directly supports workforce participation, allowing thousands of Gulf Coast parents to work, pursue training, and increase family income. In 2025 alone, the Board invested more than \$321.4 million across 13 counties to stabilize working families and strengthen local economies.

A Region of 13 Counties and Widening Gaps

Harris County is the region's economic center — home to 4.8 million residents, the Texas Medical Center, one of the world's busiest ports, and a workforce of 2.6 million people. But the childcare picture looks different depending on where you are.

Fort Bend and Montgomery counties have grown rapidly and attract significant employer investment, yet childcare capacity has not kept pace with population growth. Galveston and Brazoria counties carry a significant share of the region's energy and petrochemical workforce - industries that run on shift schedules that standard childcare hours were never designed to accommodate. In Liberty, Waller, Matagorda, Colorado, and Wharton counties, the challenge is more fundamental: licensed childcare

providers are simply scarce. These are childcare deserts: areas where working families outnumber available slots by a ratio of three to one or more.

Deserts also exist within Harris County itself, concentrated in lower-income communities on the east side and north of Beltway 8. Geography and income together determine access. For families in these communities, the waitlist is not a temporary inconvenience. It is a closed door.



28,000 families in the Gulf Coast region are currently waiting for childcare help.

What Child Care Makes Possible

When a family receives help paying for childcare, the most immediate result is that a child has a safe, stable place to be. The next result is that a parent can go to work. Research shows that access to affordable childcare increases employment among mothers by 10 to 20 percent. For single mothers,, who represent a large share of families the Board serves, that shift can be the difference between part-time and full-time work, between an entry-level job and a career pathway.

The effects compound over time. A parent who works consistently builds job experience, earns raises, and gains access to employer benefits. A parent who can take on a training program or earn an industry credential moves into higher-wage work. Regional employers across healthcare, energy, logistics, and manufacturing increasingly recognize this dynamic - offering child-care support not as a perk, but as a workforce strategy.



Children in stable, quality early childcare are more likely to succeed in school, graduate, and earn higher wages as adults – outcomes that strengthen families and reduce long-term public costs.

What the Board Does - and What It Costs to Do It

The Gulf Coast Workforce Board's childcare investment flows in two directions. One stream helps families directly — covering part or all of the cost of licensed childcare for parents who are working or in school. The other supports the quality and capacity of providers across the region, particularly in communities where providers operate on the thinnest margins. Both matter. Helping a

family pay for childcare only works if there is quality care available to access. The Board oversees the Texas Rising Star quality rating program across all 13 counties, and participation in quality-rated care grew 41 percent statewide between 2023 and 2024 — a meaningful signal that the investment in provider quality is working.



The GCWB invests approximately \$370 million each year in childcare assistance for working families - more than any other workforce board in Texas. Research consistently shows that every dollar invested in childcare generates an estimated \$7 return to the broader economy, through wages earned, taxes paid, and reduced strain on other public systems.

The childcare workforce itself is a structural challenge that runs beneath all of it. The people who care for the region's youngest children earn a median wage of \$12 to \$14 an hour. Annual turnover among childcare workers runs at roughly 30 percent nationally — a rate that directly affects the stability and quality of care families receive. Provider stability and worker wages are not separate from the access problem. They are part of the same system.

Looking Ahead

Federal pandemic-era funds that expanded childcare access across Harris County, the largest recipient of childcare dollars, are set to expire in December 2026. The transition will require planning and sustained investment at both the state and local level to avoid losing ground in a region where the demand for childcare help already far exceeds what the current system can serve.

BY THE NUMBERS

583,792 children under 6 in Texas have working parents and live below **200% of the federal poverty line.**

~485,000 eligible low-income children ages 0–5 are **not served by the Texas Workforce Commission child care subsidy system.**

\$7.59 billion annual cost to Texas employers from **child care-related absences, turnover, and lost productivity.**

\$1,188.00 per month average cost of **center-based infant care nationally.**

Infant care can consume roughly 39% of a single parent's income on average.

\$12–14 per hour median hourly wage for **child care workers in the Houston metro area.**

~30% annual turnover rate among **child care workers nationally.**

Sources: Children at Risk (2024 statewide analysis; BCY 2024); Texas Workforce Commission, Child Care Workforce Strategic Plan; U.S. Department of Health and Human Services federal child care affordability estimates (2024); Bureau of Labor Statistics Occupational Employment and Wage Statistics (2024); Center for the Study of Child Care Employment national workforce data; national child care affordability analyses.



Focus On Youth



Hire Gulf Coast Youth

In 2025, we launched Hire Gulf Coast Youth (HGCY), a regionwide effort to expand access to paid work experience, training, and career exploration for young people across the Gulf Coast. Designed for youth ages 14–24, the program creates structured opportunities to connect directly with employers in industries that are growing across the 13-county region.

Hire Gulf Coast Youth brings together internships, summer employment, apprenticeships, and work-based learning into a regionwide platform that connects young people to professional environments and workplace standards. Participants gain practical skills, build work history, and see how careers progress within high-demand sectors. Career advisors work alongside youth using regional labor market data to identify growing

occupations, required credentials, and wage progression over time. Eligible participants are connected to scholarship-supported training aligned with workforce priorities, strengthening their ability to move from exploration into sustained employment.

The program expands paid youth employment and work-based learning opportunities across the region, connecting students and young adults directly with local employers. Through internships, summer jobs, and apprenticeships, participants build practical skills, establish a work record, and gain clearer direction into education, training, and industry-aligned employment. For businesses, the program creates meaningful connections with emerging talent while contributing to long-term workforce development across the Gulf Coast.

YOUTH SERVED

WIOA Youth Served
2,721

Youth Apprentices
232

Participating Employers
246

WIOA Youth Employed
1,100

WIOA Youth Trained
846

WIOA Work-Based Learning
703

Universal Youth
24,255



Tri-Agency Convening

In January, the Gulf Coast Workforce Board hosted the 2nd Annual Regional Conveners Conference, bringing together more than 400 students, educators, workforce professionals, and regional employers for a half-day event focused on career exploration, pathways, and professionalism. Education stakeholders, including teachers, joined students to share best practices and explore talent pipeline strategies across the region.

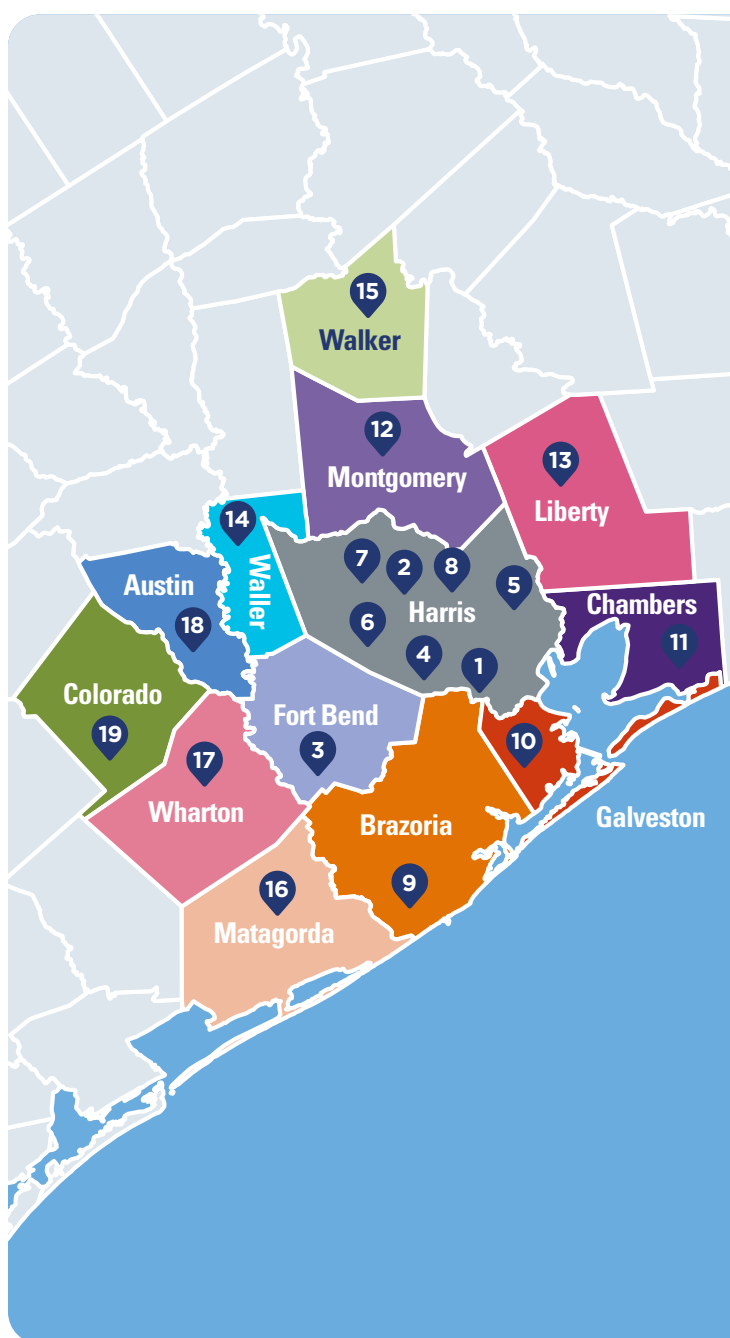
The GCWB serves as the regional convener for the Tri-Agency Workforce Initiative, a statewide partnership led by the Texas Education Agency, the Texas Higher Education Coordinating Board, and the Texas Workforce Commission. Together, these agencies work to strengthen the connections between education and employment so that students and young people across the 13-county region have clear, supported pathways into high-demand careers.



9

Connecting the System to the Community

EVENTS AND JOB FAIRS



- 1 Technical Industry Career Fair
- 2 Healthcare Hiring Support
- 3 Professionals Hiring Event
- 4 Community, Education, & Social Service Hiring Event
- 5 Production and Transportation Industry Hiring Event
- 6 Connecting Talent to Professional, Scientific & Technical Positions
- 7 Installation, Maintenance, and Repair
- 8 Connecting IT and Professional Careers Across Industries
- 9 Work In Pearland Job Fair
- 10 Gain Your Independence Hiring Event
- 11 Baytown Multiple Employer Hiring Event
- 12 Central Library Hiring Event
- 13 Community Development Corporation Job Fair
- 14 Hempstead Summer Opportunity Connect Event
- 15 Arbors of Sam Houston Hiring Event
- 16 AAA Roadshow Job Event
- 17 Women in Industry Workshop
- 18 Austin County Job Fair & Career Expo
- 19 Columbus High School Job Fair

WHO'S HIRING



ABC 13 “Look Who’s Hiring” Partnership

Workforce Solutions Gulf Coast continues its partnership with ABC 13 and reporter Nick Natario’s “Look Who’s Hiring” series to highlight upcoming job fairs and hiring opportunities across the region. Stories air in advance of major hiring events, giving employers additional visibility and helping job seekers learn about opportunities before the doors open.

The ongoing coverage expands public awareness of Workforce Solutions services and keeps workforce issues in the public conversation, while reinforcing the Board’s role in connecting employers with the talent they need and residents with pathways to employment.

Hiring Red, White & You! Veterans Job Fair

Workforce Solutions Gulf Coast (WFS-GC) hosted the 14th Annual Hiring Red, White & You! job fair, connecting veterans, transitioning service members, and military families with meaningful employment opportunities across the region. As part of this statewide initiative, the event serves as one of the region’s largest coordinated hiring efforts focused on veterans, accelerating transitions from military service to civilian employment and strengthening critical industries across the Gulf Coast. The event brought together 102 employers and welcomed more than 850 job seekers, uniting businesses, workforce partners, and community organizations to provide direct hiring opportunities and targeted career resources for those who have served.

Expanding Strategic Partnerships

In February, WFS-GC partnered with the Houston Livestock Show & Rodeo to host the first-ever Technical Industry Career Fair at NRG Park, one of several new partnerships in 2025. The collaborative event connected youth and job seekers directly with employers across high-demand sectors, establishing a new model for large-scale regional workforce engagement. A total of 492 job seekers attended, including 216 youth participants, engaging with more than 30 employers and creating direct pathways to career exploration and employment opportunities.

DIGITAL ENGAGEMENT

In 2025, the Gulf Coast Workforce Board took deliberate steps to strengthen how it communicates and connects with communities across the 13-county region.

Digital engagement is integral to how the Board reaches communities, expands access, and strengthens partnerships. In 2025, we reimagined our digital communications strategy to reflect best practices seen in the most effective mission-driven organizations. With focused investments in social media, the launch of a curated news platform, and an integrated promotional strategy around key initiatives like Hire Gulf Coast Youth (HGCY), our communications efforts are driving action, deepening partnerships, and reaching the community in meaningful ways.

This work aligns directly with the strategic plan's goal to increase awareness of services and began with the recognition that each platform - LinkedIn, Facebook, Instagram, and YouTube - serves a distinct purpose. LinkedIn has been cultivated as a space for professional storytelling and thought leadership, helping the Board speak directly to employers, policymakers, and institutional partners. Reach expanded significantly each month in 2025 and far exceeded typical engagement benchmarks, indicating that the Board's voice is resonating with the audiences who influence workforce policy, hiring decisions, and partnership development.

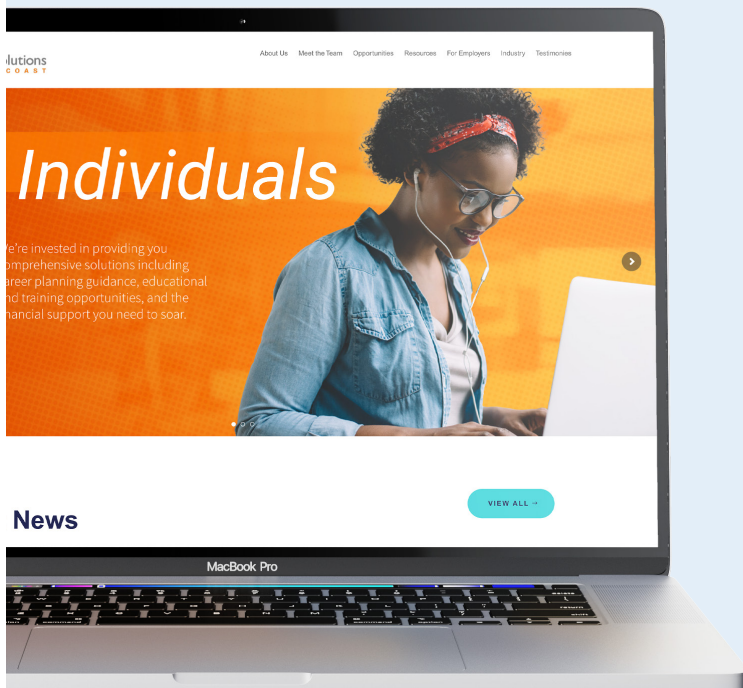


Facebook

continues to be our most effective tool for community-level outreach. With a follower base of more than 10,000, our efforts were on mobilizing engagement around programs that matter most to families and jobseekers. A single campaign promoting the Hire Gulf Coast Youth (HGCY) portal received over 5,000 views, demonstrating that our strategy is not just building awareness, but also driving community members to our services. Indeed, HGCY has become a case study in integrated digital outreach. Through a combination of Facebook engagement, Instagram storytelling, and LinkedIn amplification, these efforts helped ensure the program is reaching its intended audience efficiently and effectively. More importantly, by incorporating youth-centered visuals, real testimonials, and targeted language, our strategy has emphasized trust and relevance - two crucial factors for connecting with younger jobseekers.

VISIBILITY AND COMMUNICATIONS

The GCWB's communications efforts in 2025 were not focused solely on social media. The Board launched two new platforms designed to give employers, job seekers, partners, and the public consistent, reliable access to workforce information across the region.



Workforce Solutions News

WorkforceSolutionsNews.com, was launched in March 2025 as both a website and an app. It is a digital platform built to inform, educate, and align stakeholders across the region. The site is structured to serve four audiences: community partners, clients and the public, workforce boards and policymakers, and industry leaders. With content organized around scheduled updates, timely news, and evergreen resources, the site reflects a modern newsroom model—one that balances consistency with agility. From initiative spotlights to real-time labor market updates, and from how-to guides to success stories, Workforce Solutions News is positioning us as not only a service provider, but also a trusted information source within the workforce development ecosystem.

Workforce Solutions Newsletter

2025 also marked the introduction of a digital newsletter, publishing five editions in the last half of the year and establishing a regular cadence of one issue every 45 days going forward. Created to provide greater clarity, transparency, and centralized updates, the newsletter ensures employers, job seekers, partners, and community stakeholders receive consistent, accessible information about workforce resources and system initiatives in one place.

Each edition amplifies Workforce Solutions' work by highlighting hiring events, job fairs, program updates, and service changes that directly affect customers and partners — improving awareness of available services, supporting participation in workforce programs, and strengthening regional alignment around workforce priorities.

Since launch, the newsletter has reached approximately 660,000 individuals across a distribution base of over 1.25 million people. It has quickly become a scalable communications channel connecting the public and employers to timely workforce opportunities and information across the Gulf Coast region.

\$1.4 million
in earned media
value and reached
more than
6.5 million
viewers

Earned media continued to play a strategic role in strengthening our regional visibility and credibility. In a media environment where trust and third-party validation matter, coverage across broadcast, digital, and bilingual outlets positioned the GCWB as a trusted source of workforce and labor market information. This visibility expanded public awareness of workforce services, reinforced engagement with employers and community leaders, and helped ensure that accurate, timely workforce information reached residents across the region.



10

Governance

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Alief ISD

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Group 1 Automotive

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Navarro Insurance Group

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United Way of Greater Houston

Marie Arcos
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Mia Garcia
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Monica Riley
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Pearland EDC

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Russell Tomlin

Senior Manager, Career Services

Sabrina Uy

*Senior Manager, Quality Assurance
& Risk Management*

