San Angelo Quarterly Economic Review

Q1 2026

San Angelo
Chamber of Commerce
Economic Development

SARMA
San Angelo Regional Manufacturers Alliance
— Est. 2017 —
San Angelo
Chamber of Commerce

City of
San Angelo
Texas
Development Corporation

Tom Green County
The State of Texas

To our investors, employers, and community partners:

San Angelo's economy continues to demonstrate resilience, balance, and steady, measured growth. The civilian labor force remains high (63,837) and unemployment is still below both Texas and U.S. averages, underscoring a stable workforce environment for existing businesses and prospective employers. At the same time, local housing, commercial development activity, and consumer spending point to a market that is active and adaptable as broader conditions evolve.

This Quarterly Economic Review is presented in an enhanced format designed to be both easy to read and useful for decision-making. The report is organized into three sections: Employment, Real Estate, Travel and Tax, each with data visualizations followed by plain-language analysis and a short outlook. The goal is to give business leaders, site selectors, policymakers, and residents a concise, data-driven snapshot of San Angelo's current economic position and near-term trajectory.

The employment section highlights labor force trends, unemployment rates, and non-farm and manufacturing employment, emphasizing San Angelo's comparatively low unemployment and stable employment base. The real estate section tracks single-family and commercial building permits alongside median home prices, showing a modest rebound in permitting and home prices that are rising while remaining more affordable than both the Texas and national medians. The travel and tax section covers airport passenger counts, hotel occupancy, and sales tax revenue, indicating resilient visitor activity and local consumer spending even with some quarter-to-quarter variation in air travel.

Economic development in San Angelo is a collaborative effort focused on sustaining and growing this diversified base. The San Angelo Chamber of Commerce's economic development team uses the data in this report to guide business recruitment, expansion, and retention; to identify opportunities for workforce attraction and training; and to coordinate with partners on infrastructure and community development priorities. Readers can use these quarterly snapshots to benchmark San Angelo against state and national trends, assess timing for investment or expansion, and better understand the context for policy and planning decisions.

Michael Looney
Vice President of Economic Development
San Angelo Chamber of Commerce

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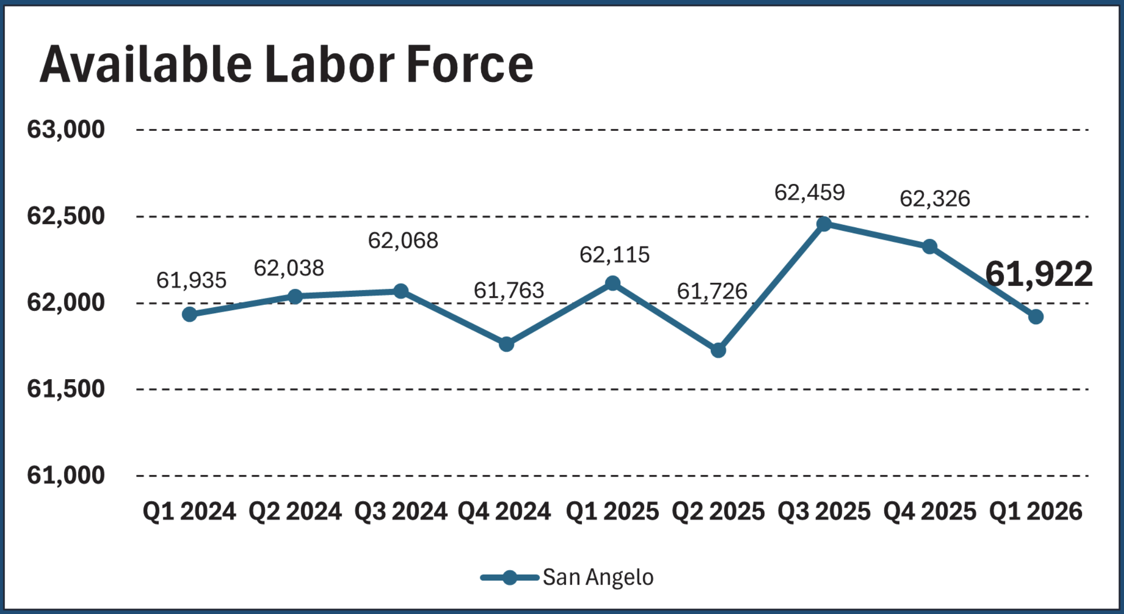
Employment Data

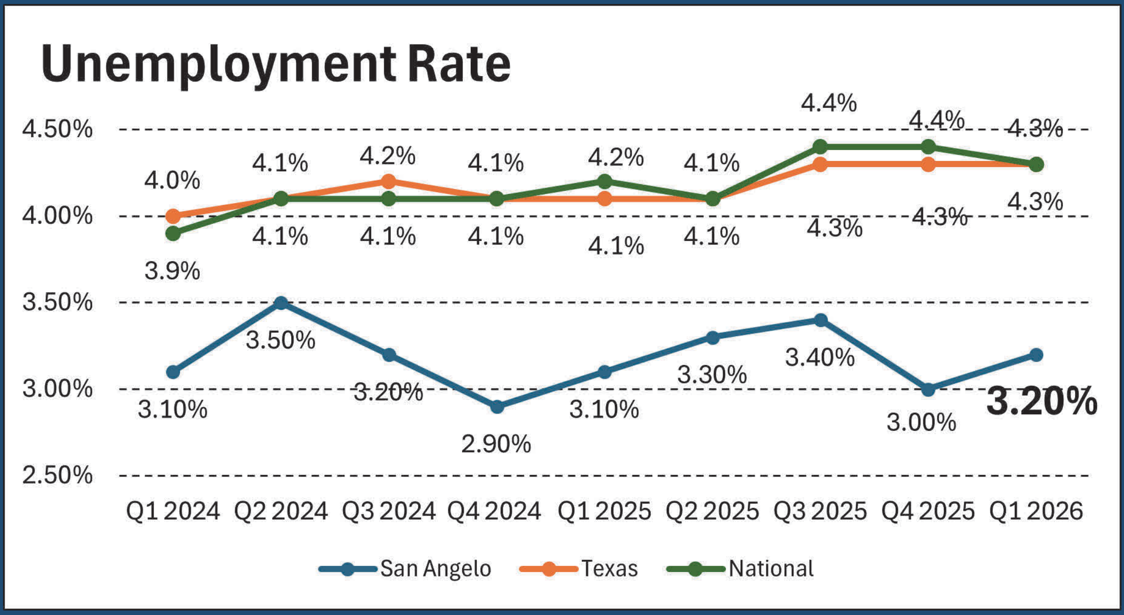


Change (last quarter)

-0.65%

Change (YoY)

-0.31%

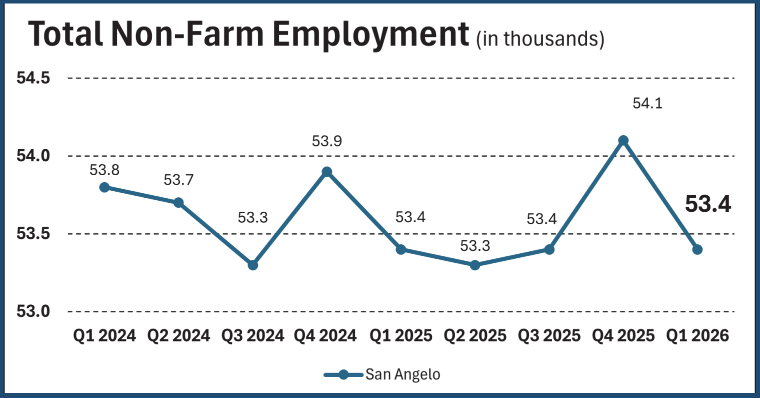


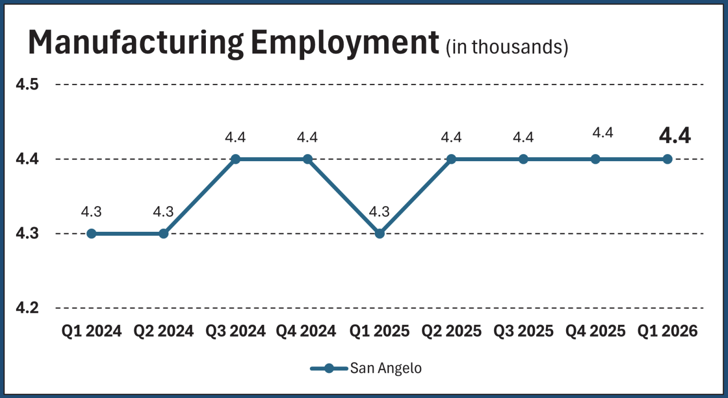
Change (last quarter)

6.67%

Change (YoY)

3.23%





Source: U.S. Bureau of Labor Statistics

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Employment Data Analysis and Outlook

Labor Force

San Angelo's civilian labor force remained relatively stable through Q1 2026, slipping slightly to 61,922 from 62,326 in Q4 2025. Even with that small quarterly decline, the labor force stayed near its recent high, which suggests the community continues to maintain a solid working-age population and active labor participation. The modest year-over-year decline of 0.31 percent does not indicate a major contraction, but it does show that labor force growth has leveled off after earlier gains in 2025. For economic development purposes, this points to a labor market that is steady, but one that will need continued workforce attraction and retention efforts to support future expansion.

Unemployment

San Angelo's unemployment rate rose slightly to 3.2 percent in Q1 2026, up from 3.0 percent in the prior quarter. That level remains below both Texas at 4.3 percent and the national rate at 4.3 percent, showing that San Angelo continues to outperform the broader state and country on joblessness. The local increase suggests some easing in labor market tightness, but not enough to signal weakness; rather, it reflects a more balanced labor market that still offers employers access to available workers. Relative to Texas and the nation, San Angelo's lower rate remains a positive indicator for business confidence and workforce stability.

Non-Farm Employment

Total non-farm employment in San Angelo held at 53.4 thousand in Q1 2026, down from 54.1 thousand in Q4 2025. While that quarterly dip suggests some seasonal or temporary softening, the broader pattern remains steady, with employment staying within a narrow range over the past several quarters. This level of consistency indicates that the local economy has preserved its employment base even without strong short-term expansion. For a report narrative, the data supports a message of resilience and incremental change rather than rapid job growth.

Manufacturing Employment

Manufacturing employment remained unchanged at 4.4 thousand in Q1 2026, continuing a pattern of stability that has held for several quarters. The year-over-year gain of 2.33 percent shows that manufacturing has improved modestly over the past year, even though recent quarterly movement has been flat. That steadiness is important because manufacturing often provides a dependable base of higher-wage jobs and supports linked activity in logistics, maintenance, and local supply chains. In the context of San Angelo's overall labor market, manufacturing appears to be a stable anchor sector rather than a fast-growing one.

Outlook

San Angelo's labor outlook is favorable but measured, with the labor force remaining near recent highs, unemployment still below Texas and national levels, and both non-farm and manufacturing employment holding relatively steady, which points to a stable employment base rather than a volatile one; over the next several quarters, the most likely outcome is continued modest job growth supported by steady employer demand, though stronger gains will depend on workforce availability, retention of local talent, and the ability to match labor supply with business needs.

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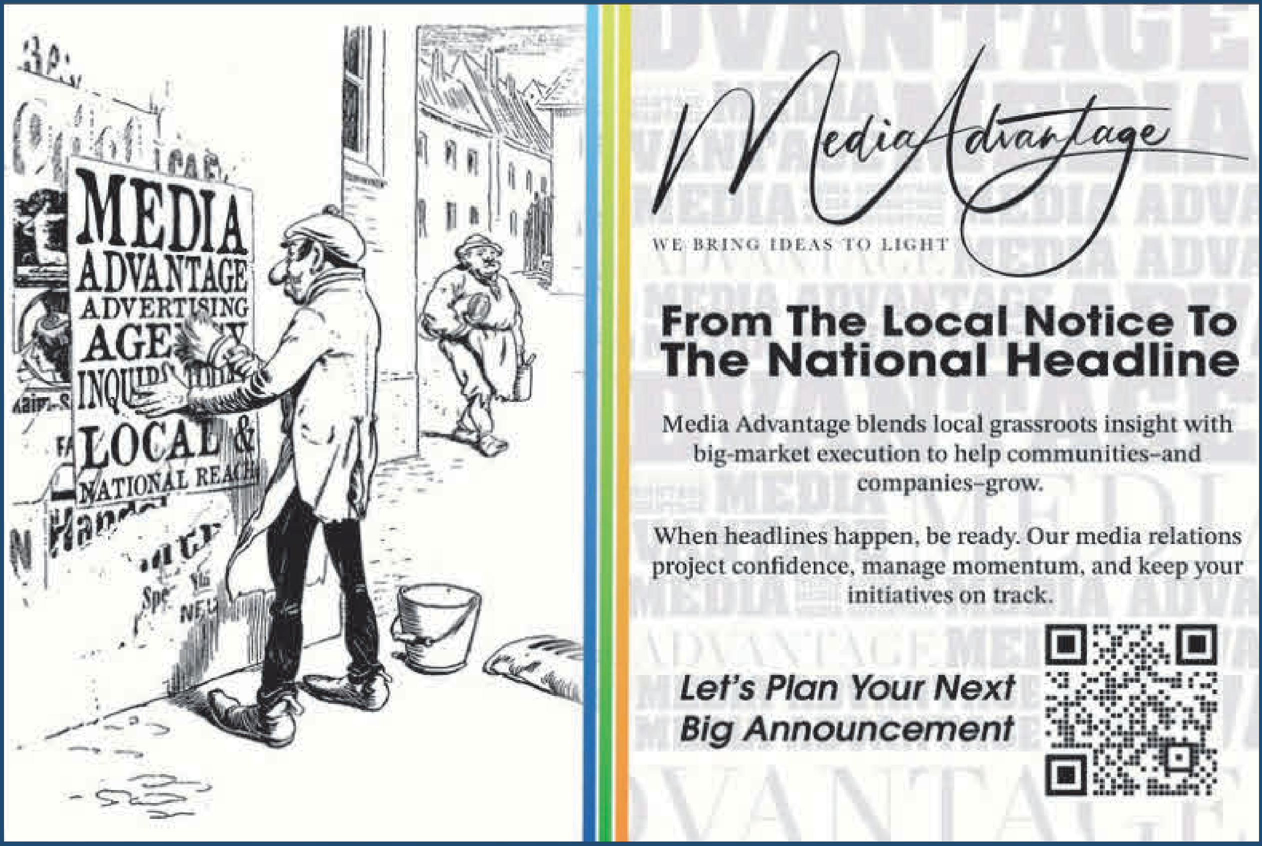

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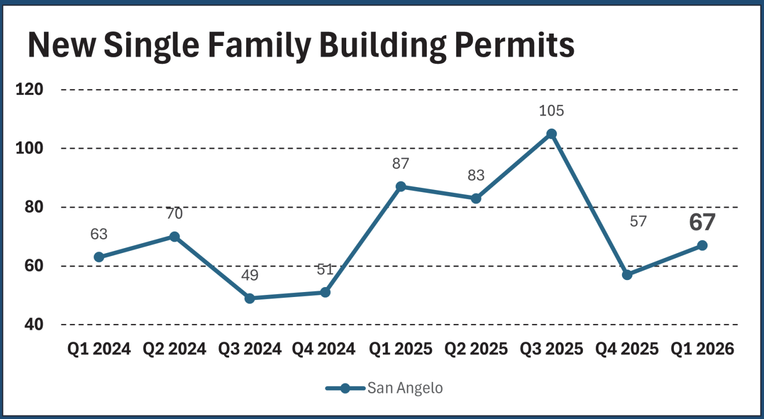
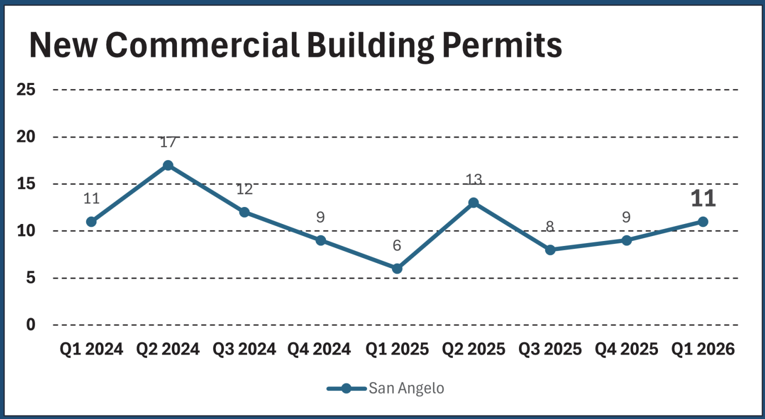
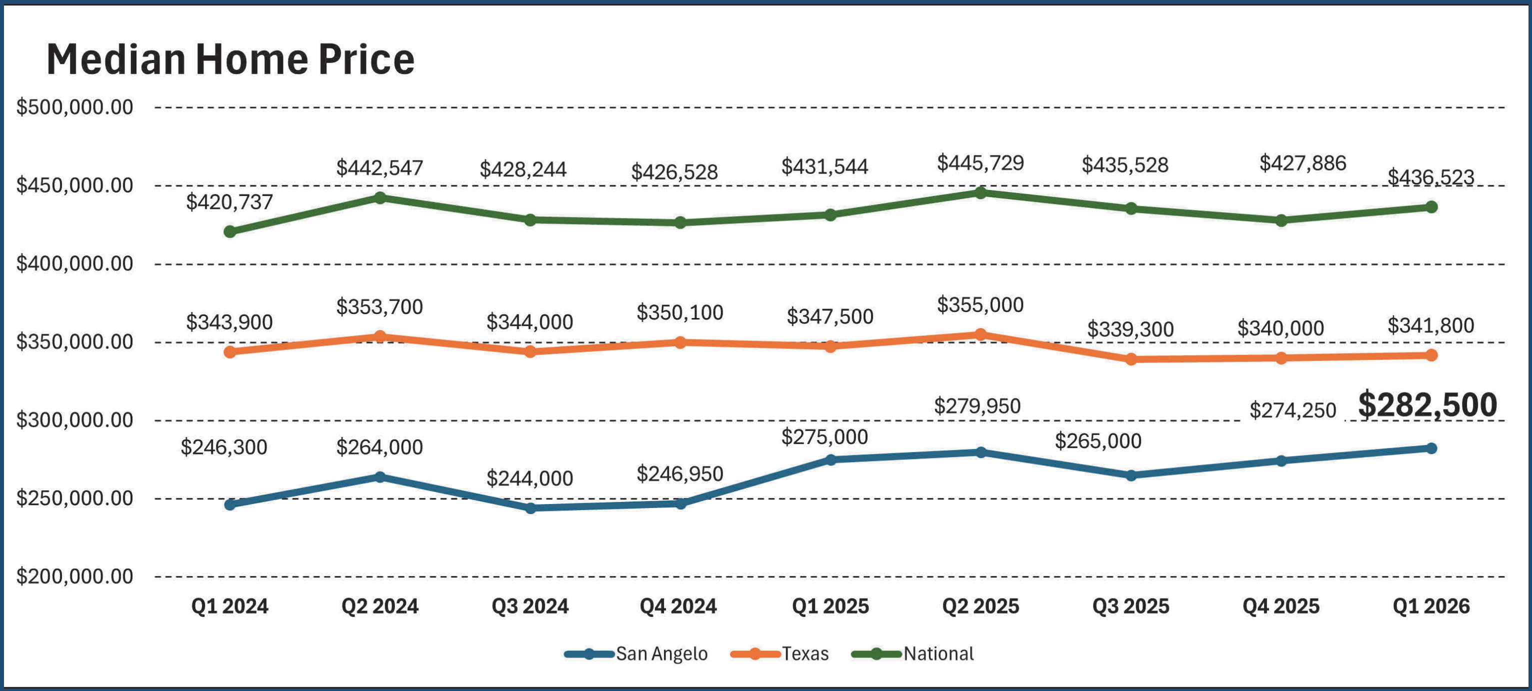
Real Estate Data





Change (last quarter)	Change (YoY)	Change (last quarter)	Change (YoY)
17.54%	-22.99%	22.22%	83.33%



	Change (last quarter)	Change (YoY)
San Angelo	3.01%	2.73%
Texas	0.53%	-1.64%
National	2.02%	1.15%

Source: City of San Angelo, Texas A&M Real Estate Research Center, Redfin.com

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Q1 2026 **Real Estate Data Analysis and Outlook**

New Single Family Permits

Single-family permits increased to 67 in Q1 2026 from 57 in Q4 2025, showing a rebound in residential construction activity after a softer prior quarter. Even so, the year-over-year comparison remains down 22.99 percent, which suggests the market is still below its stronger mid-2025 pace. This pattern points to a housing sector that is active but uneven, with enough demand to support new starts while still reflecting affordability or inventory constraints. In an economic development context, the permit count is a positive sign for long-term housing supply, but not yet evidence of sustained acceleration.

New Commercial Building Permits

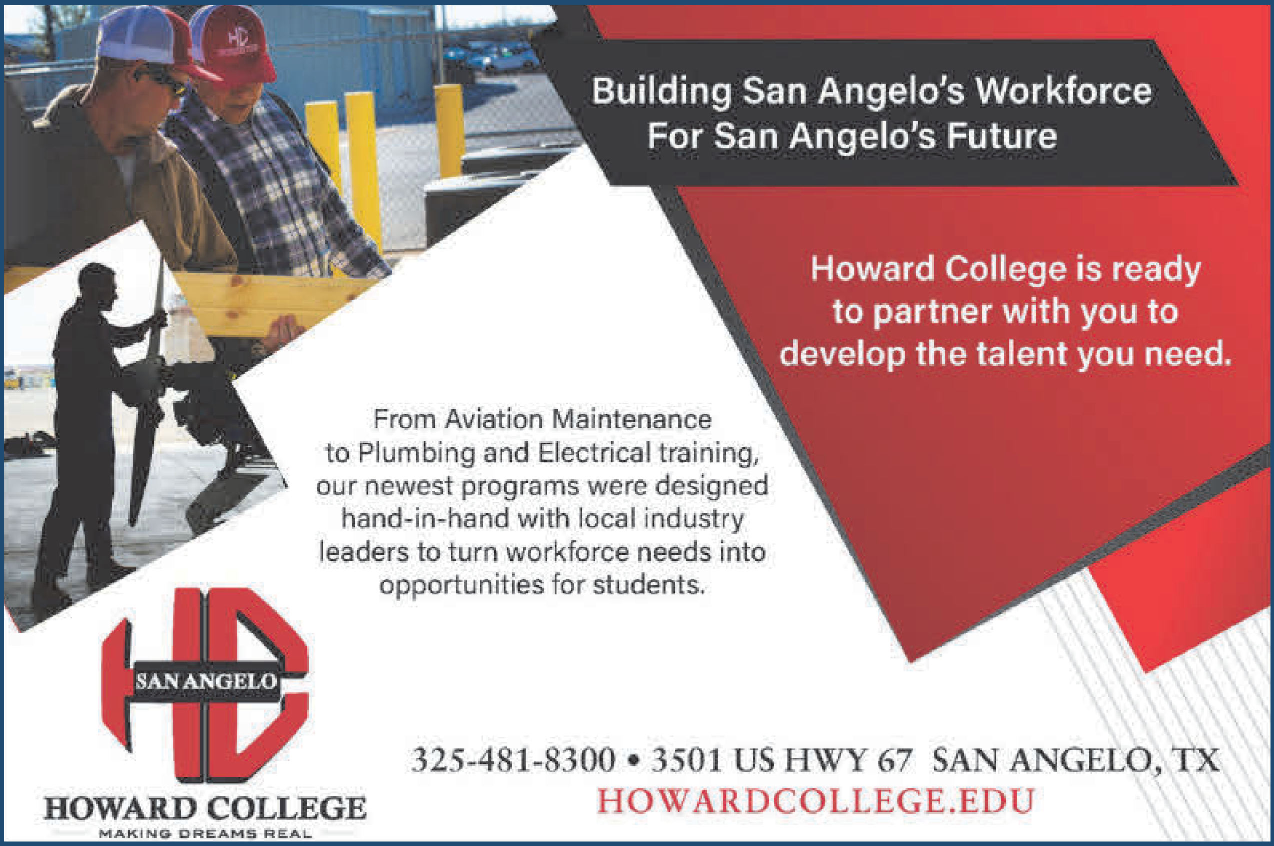
Commercial permits rose to 11 in Q1 2026 from 9 in Q4 2025, indicating a modest improvement in commercial development activity. The year-over-year increase of 83.33 percent is especially notable, although it should be viewed in context because commercial permit volumes are relatively small and can move sharply from quarter to quarter. Still, the data suggests that business-related construction remains present and may be gaining some traction after a quieter period. For San Angelo, this is a constructive sign that private investment interest is holding up and that the market continues to support select nonresidential projects.

Median Home Price

Median home price in San Angelo rose to $282,500 in Q1 2026 from $274,250 in Q4 2025, a 3.01 percent quarterly increase that reflects continued local housing market strength. Even with that growth, San Angelo remains significantly more affordable than both Texas, where the median home price was $341,800, and the national median of $436,523 in Q1 2026. Year over year, San Angelo's home price increased 2.73 percent, outperforming Texas, which declined 1.64 percent, and also exceeding the national increase of 1.15 percent. This suggests San Angelo is maintaining a favorable balance of appreciation and relative affordability, which is a strong asset for workforce attraction, household stability, and long-term economic development positioning.

Outlook

San Angelo's housing outlook remains positive overall, with steady home price appreciation, a modest rebound in residential permitting, and continued activity in commercial construction suggesting that development demand is still present. The market appears healthy enough to support additional investment, but the pace of growth is likely to stay measured rather than rapid, especially if affordability tightens further or inventory remains limited. Compared with Texas and the nation, San Angelo's homes remain relatively affordable, which should continue to support workforce attraction and community stability. Over the next several quarters, the most likely scenario is gradual price growth and uneven but persistent permit activity, making housing both a strength and a planning priority for the local economy.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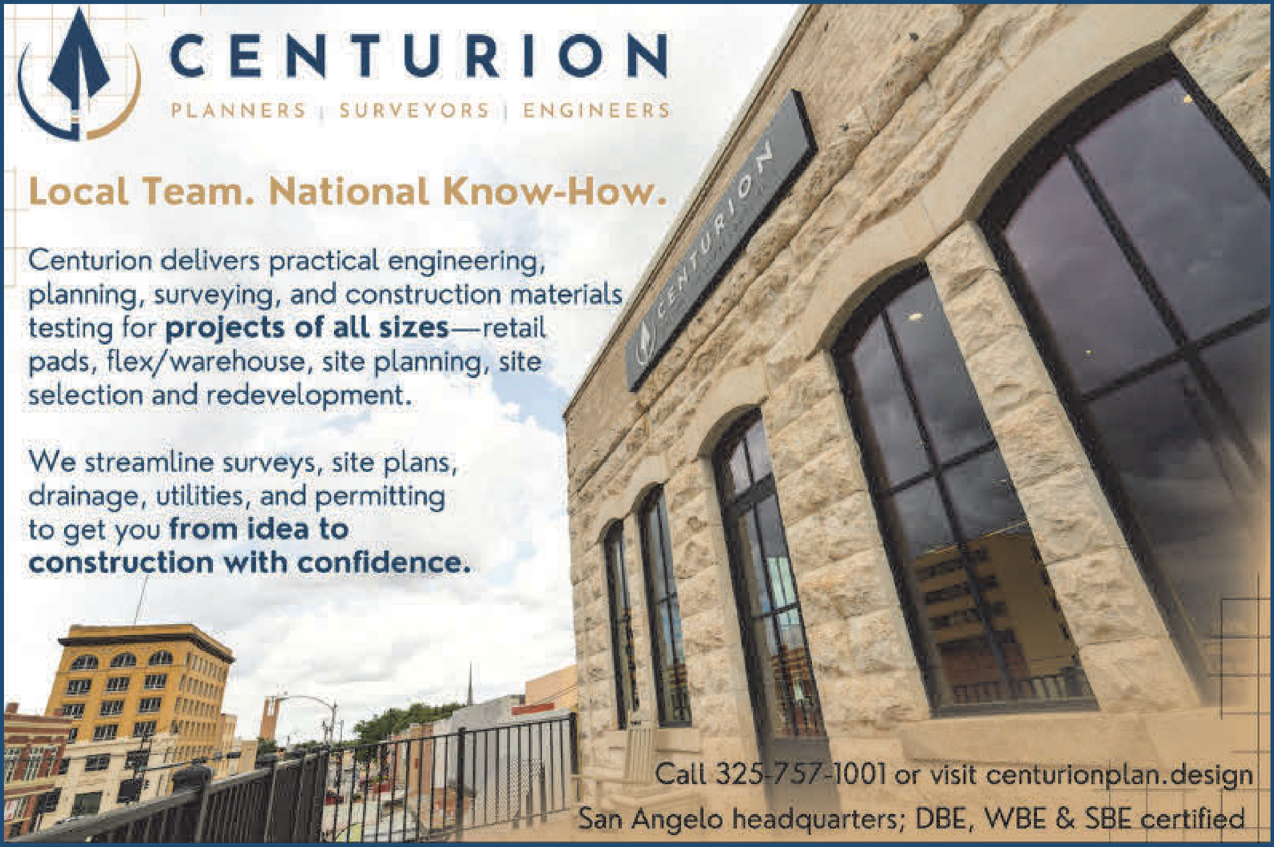
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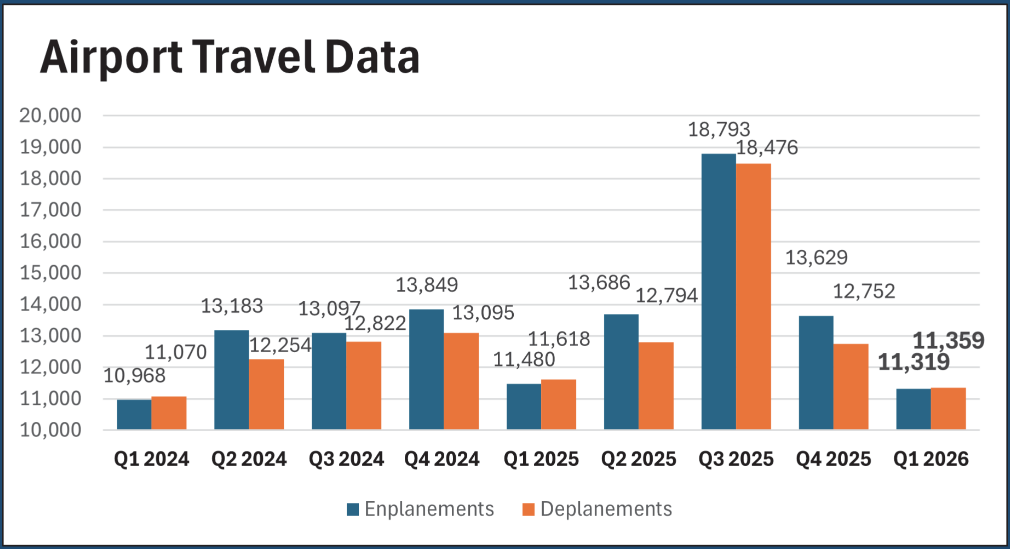
Travel and Tax Data



Change (last quarter)

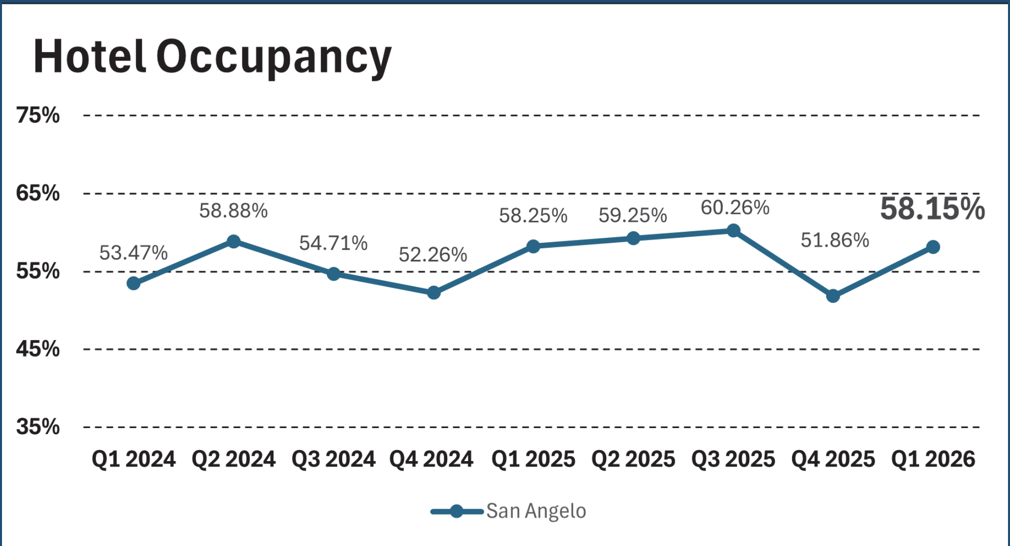
Enplanements -16.95%

Deplanements -10.92%

Change (YoY)

Enplanements -1.40%

Deplanements -2.23%

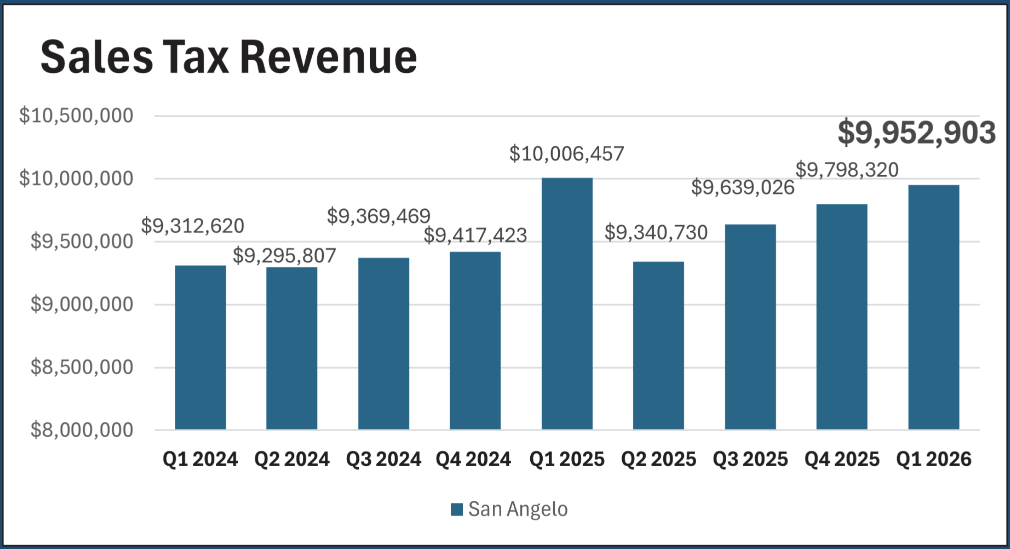


Change (last quarter)

12.13%

Change (YoY)

-0.17%



Change (last quarter)

1.58%

Change (YoY)

-0.54%

Source: City of San Angelo, San Angelo Chamber of Commerce DMO, Texas Open Data Portal

Travel and Tax Data Analysis and Outlook

Airport Travel

Airport data softened in Q1 2026, with enplanements falling to 11,319 from 13,629 in the prior quarter and deplanements dropping to 11,359 from 12,752. Even with the decline, the data still points to a functioning and active airport market rather than a structural slowdown, since both measures remain within the broader range seen over the past year. The quarter-over-quarter decline likely reflects normal seasonal variation after stronger late-year activity, but the year-over-year changes remained only mildly negative, which suggests travel demand is somewhat softer rather than sharply weakened. For economic development purposes, this means airport activity should be viewed as a useful indicator of regional access and business mobility, but not yet as a sign of major concern.

Hotel Occupancy

Hotel occupancy improved to 58.15 percent in Q1 2026 from 51.86 percent in Q4 2025, showing a solid rebound in lodging demand. That increase is important because it suggests visitor activity, business travel, or event-related stays were stronger even as airport passenger counts declined. The year-over-year comparison was essentially flat, which indicates the market is holding steady rather than surging, but it remains healthy enough to support the hospitality sector. In a broader economic context, hotel occupancy is one of the better signs that San Angelo continues to attract overnight visitors and maintain local spending tied to travel and events.

Sales Tax Revenue

Sales tax revenue increased to $9.95 million in Q1 2026 from $9.80 million in Q4 2025, signaling continued consumer spending strength. Although the year-over-year change was slightly negative, the quarterly gain shows that local sales activity remained resilient and that the community entered the new year with stable taxable consumption. Because sales tax is influenced by retail, dining, services, and other day-to-day economic activity, this metric offers a broad view of local confidence and spending behavior. Overall, the trend suggests San Angelo's consumer economy remains steady, even if growth is modest rather than dramatic.

Outlook

San Angelo's travel and tax outlook is stable with some near-term variability. Airport activity may continue to fluctuate from quarter to quarter, but hotel occupancy and sales tax revenue suggest that underlying visitor demand and local consumer spending remain intact. If lodging performance stays near current levels and sales tax collections continue their recent upward quarterly trend, the broader section should remain a modest positive for the local economy even if passenger traffic remains uneven. Overall, the data points to a travel and spending environment that is not accelerating sharply, but is resilient enough to support steady economic activity over the coming quarters.

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