

Letter from Texas: September 2025

Will Trump 47 make Texas competitive after 30 years of Republican dominance? It could happen more quickly than most realize.

By Richard Murray, Senior Research Fellow, Hobby School of Public Affairs

In introducing these reports last month, I stressed that Texas – long sidelined in the national political discussion – will play a critical role in the second Trump presidency. The state is the most important state in the president's political coalition, but it does not align with key elements of the MAGA program. Consider Donald Trump's foundational belief that the United States is broken and only he can restore it via an aggressive new economic nationalism, putting "America First." The problem is that the Texas economy has been doing very well, thank you. Texas's success has been driven in part by an international order supported by both major parties championing free trade, stable international alliances, and relatively high levels of immigration. Disrupting this status quo carries high political risk.

Aside from this "If it ain't broke, don't fix it" problem, President Trump's economic and immigration policies pose particular dangers for Republicans in Texas. Specifically, Mr. Trump's tariffs, including new levies on Mexican goods that largely enter the U.S. through Texas, threaten the massive cross-border trade between the Lone Star State and our southern neighbor. Coupled with the administration's plan to remove millions of undocumented persons living and working in the United States, the impact on Texas will be far greater than the domestic policies of the first Trump administration.

A majority of Texans support stronger border controls and aggressive efforts to apprehend and remove undocumented individuals who commit crimes in this country. Support is far weaker, however, for removing all persons without legal status. Most Texans appreciate the vital role undocumented workers play in key sectors of the Texas economy, including agriculture, construction, health care and hospitality. Many Texas voters also have family ties and friendships with undocumented persons and their families, and know the overwhelming majority are not criminals, but hard-working neighbors. Given the huge increases in funding for the Border Patrol and ICE now provided by the One Big Beautiful Bill (OBBB), aggressive removal efforts are likely to accelerate. The political consequences in Texas will be significant and, in my opinion, decidedly negative for the Trump administration and, by extension, Texas Republicans.

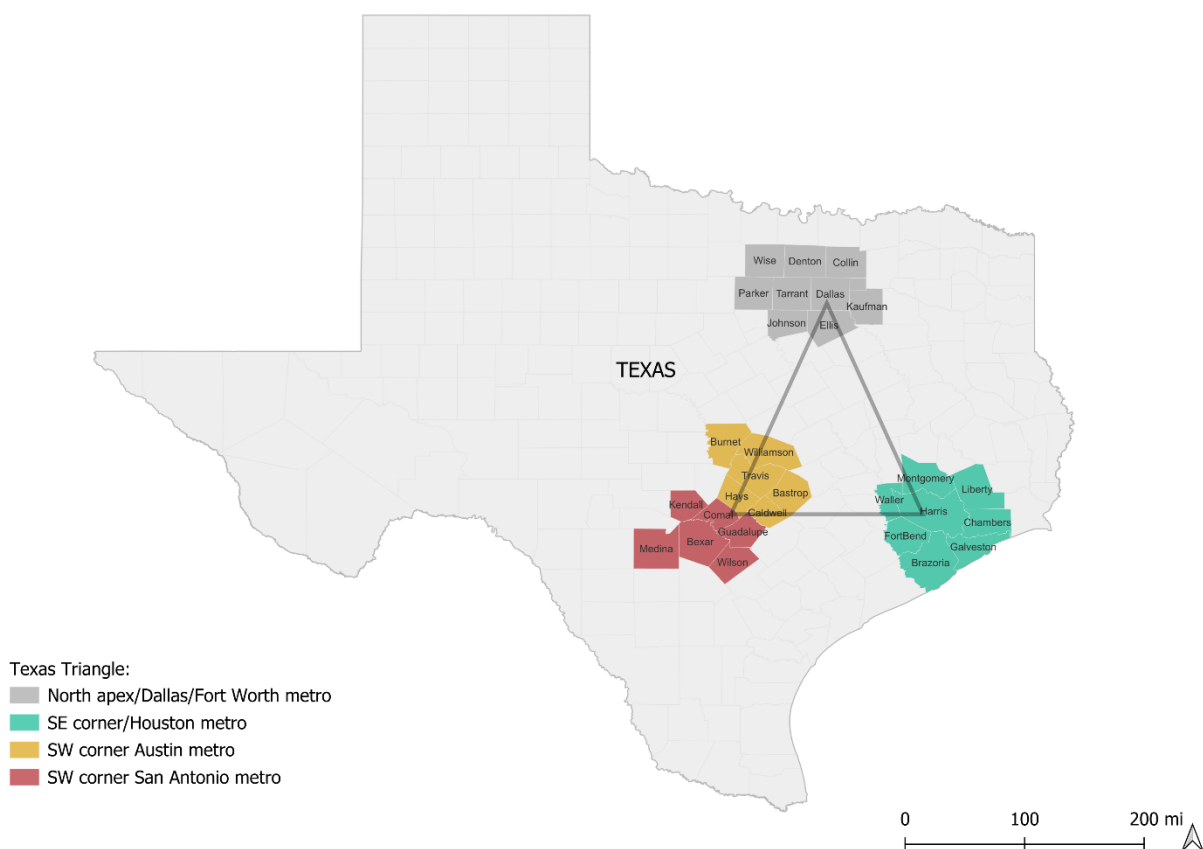
This letter starts by looking at the 21st-century Texas economy, which has been on quite a roll. Economic growth has fueled huge job gains, attracting a surge in new residents as natural population growth falls short of supplying the needed workforce. This has contributed to the decline in the Anglo population share in Texas from about 60 percent in 2000 to less than 40 percent today. Meanwhile, Hispanic growth has continued, more Blacks now live in Texas than in any other American state, and Asian growth has surged. Politically, Texas remains Republican, but central cities and inner suburbs have become more Democratic, while outer

suburban areas are shifting politically as minority populations expand. Coupled with these demographic changes, the disruptions of Trump 47 create an explosive mix.

The Lone Star State booms – especially the big metro areas forming the “Texas Triangle”

In 2015, a few months into his first term as governor, Greg Abbott sent out a press release declaring: “The Texas ‘Economic Miracle’ is far from finished.”¹ A decade later, that claim has been validated. In March 2025, the U.S. Bureau of Labor Statistics reported 15.8 million persons were employed in Texas – nearly 2.5 million more than when Abbott took office.

This economic expansion has been concentrated in four metropolitan areas that constitute the “Texas Triangle.” Dallas/Fort Worth forms the northern apex, the Houston metro area anchors the southeastern base, and the Austin and San Antonio metropolitan areas define the southwestern boundary. The triangle’s four metros encompass just 30 of Texas’s 254 counties, and only 9.6 percent of the state’s 268,596 square miles, but account for more than eighty percent of Texas’s job and population growth in the 21st century.



¹ Office of the Texas Governor, "The Texas ‘Economic Miracle’ Is Far From Finished," June 24, 2015.

The Triangle illustrates what urban economists call the *agglomeration effect* as firms and employees in specific economic sectors cluster in certain metropolitan areas, lowering production costs and improving the ability to attract and retain needed workers.

The employment and population growth in the Texas Triangle reflect several factors:

- **State policy.** Texas' political leadership has been strongly pro-business since World War II. Initially, these leaders were conservative Democrats. Since the 1990s, they have been Republicans. Both favored low taxes, minimal regulation and subsidies for key industries. Lately, the fracking boom has reestablished Texas as one of the world's largest energy producers and contributed to robust state budget surpluses.
- **Ample developable land.** The existence of large amounts of developable land around Texas's big cities reduces some costs of agglomeration. In an automobile-oriented economy, problems of crowding and traffic congestion escalate quickly in urban centers with less land than the Triangle has available. Combined with permissive local regulations, Texas developers can build the offices, warehouses and housing required by an expanding economy more easily than in other parts of the country.
- **Multiple urban centers.** Having four distinct but interconnected metros reduces some of the crowding costs associated with rapid growth while retaining the benefits of proximity and a common set of state rules.
- **Diverse economic bases.** Houston is *the* international energy capital but also home to the Texas Medical Center, the world's largest health care complex. Dallas/Fort Worth now rivals New York City as a financial hub ("Yall Street" is challenging Wall Street) and is the headquarters of two of the nation's four largest airlines. San Antonio's economy depends on tourism and military bases, but it also benefits from proximity to the growing industrial belt in northern Mexico. Austin hosts the state's flagship university, the state capital and a booming tech sector. This diversity does not make the Triangle bulletproof to economic downturns, but it helps smooth out economic swings.
- **Modern Technology.** Growth in metropolitan Texas is unimaginable without efficient and affordable air-conditioning, given the heat and humidity residents of the Lone Star State endure from May to October. Texas has also greatly benefited from advances in clean energy technology and, perhaps surprisingly, leads the nation in power generated by wind turbines and solar panels. These are now vital sources of energy as demand on the state's electric grid soars.
- **Integration in the global economy.** The Texas Triangle has thrived in the *global economy of the late 20th and early 21st century*. A relatively stable world system of peace, free trade and enhanced movement of people and technology – of which the United States is the principal architect – has been enormously important to the economic growth of the Texas Triangle.

The above factors account for why the economic “miracle” Governor Abbott celebrates mostly occurred in the Texas Triangle. As Table 1 shows, in 2000, the four big metros had 12.7 million residents. By July 1, 2024, the U.S. Census Bureau estimated 21.2 million people lived in the thirty Triangle counties – a gain of 8.5 million or 67.2 percent since 2000. Comparatively, the 224 counties outside the Triangle added 1.8 million people, a 22.1 percent gain, not much different from the gain of 18.6 percent in the rest of the United States.

Table 1: Population Growth in the Texas Triangle: 2000 – 2024

Metro Area	2000	2010	2020	July 1, 2024	Gain	%
Dallas/Fort Worth	5,080	6,280	7,537	8,225	3,145	61.9
Houston	4,670	5,891	7,092	7,734	3,064	65.6
San Antonio	1,655	2,077	2,488	2,647	992	59.9
Austin	1,284	1,759	2,333	2,606	1,322	103.0
Triangle Total	12,689	16,007	19,450	21,212	8,523	67.2
Rest of Texas	8,255	9,235	9,695	10,079	1,824	22.1
Other 49 States	260,478	283,505	302,371	308,821	48,343	18.6

Source: U.S. Census Bureau. Data are in thousands.

Few retirees move to Texas. Nobody comes to Texas because of generous public benefits. Population growth is thus driven almost entirely by net employment gains. Texas has added about five million new jobs in the 21st century, with more than 80% located in the Triangle.

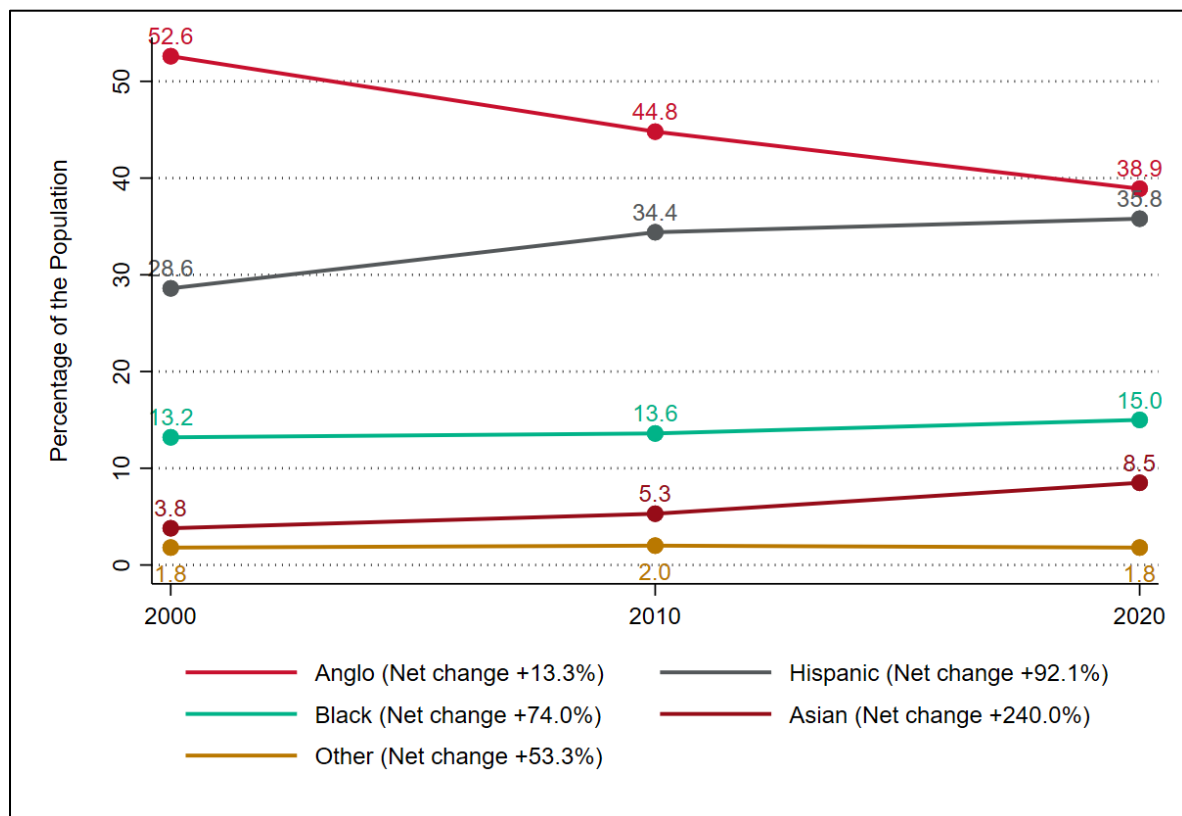
Historically, new jobs in metropolitan Texas were filled by migration from the state’s rural areas and smaller cities, by interstate movers from poorer adjacent states like my native Louisiana, and robust natural population increases. Since 1990, however, these sources have sharply declined. Much of rural Texas is depopulated. Migration from the poorer states to the east has slowed as housing costs have soared in urban Texas. Birth rates, especially among Texas Anglos, have plunged. Interstate migration has shifted to the new “donor” states of California, New York, Illinois and Florida. While these interstate movers help fill the gap, the largest and fastest-growing source of new workers is foreign-born persons. Simply put, *there are not nearly enough native-born Americans to meet the employment needs in the Texas Triangle.*

With millions of people moving to Texas for economic opportunities, the state’s racial and ethnic makeup has rapidly changed in the 21st century. Anglo population growth since 2010 accounts for only five percent of the state’s population gain.

The overall pattern trend toward a much more diverse state population is most evident in the big metropolitan areas. Figure 1 shows that while all major racial/ethnic groups experienced growth in the Texas Triangle, the Anglo population gained just 13.3% from 2000 to 2020, and

their share of the Triangle population declined from 52.6% to 38.9%. Comparatively, the Hispanic population grew by 92.1% and their share in the Triangle rose from 28.6% to 35.8%. The Black population increased by 74.0% between 2000 and 2020, and their share in the Triangle rose from 13.2% to 15.0%. The fastest growth was among the diverse Asian populations moving to Texas after 2000. At the turn of the century, only about 486,000 persons identified themselves as Asian or Pacific Islander in Texas. By 2020, they totaled 1,652,000 – a gain of 240 percent. Their share of the Triangle population was just 3.8% in 2000, but more than doubled to 8.5% in 2020.

Figure 1: Racial and Ethnic Population Makeup in the Texas Triangle (2000-2020)



Source: U.S. Census Bureau. Population data in thousands.

Note: Anglos are persons who defined themselves as White and not Hispanic. Hispanics are all persons who defined themselves as such, unless they also said they identified as “Black,” in which case they are placed in the latter category. The Asian category also includes persons who identified as Pacific Islanders.

Metropolitan Diversity and Partisan Change in Texas

John B. Judis and Ruy Texieira’s book, *The Emerging Democratic Majority*, came out in 2002.² The authors argued that the most dynamic and fastest-growing areas of the country were becoming more racially and ethnically diverse and were home to a new wave of progressive Democratic voters that could transform American politics. Since the Texas Triangle has been the fastest-growing urban area in the United States, how well does its thesis hold up? Looking at presidential voting since 2000, the answer is fairly well through 2020, but not at all in 2024.

Table 2 summarizes the two-party presidential vote totals in the Texas Triangle starting with the Bush/Gore race in 2000. Note the huge increase in the total presidential vote. In 2000, Bush and Gore received a combined 3.8 million votes. By 2024, Harris and Trump doubled that to 7.7 million votes. The Triangle counties cast 61.7% of the state’s total vote in 2000; by 2024, their share was 68.7%. The Democratic candidates improved their performance in four of the five elections from 2004 to 2020. Al Gore lost all four metro areas to George W. Bush in 2000, winning just 40.1% of the two-party vote. In 2020, Joe Biden won all four metropolitan areas, taking 52.7% of the two-party vote. In 2000, the Democratic deficit in the Triangle was 763,000 votes. In 2020, they had a surplus of 421,000 – a net swing of almost 1.2 million votes.

Table 2: Two-Party Presidential Vote in Texas Triangle: 2000 – 2024

Year	Vote in Thousands		Share of Total	
	Rep	Dem	Dem %	State Vote %
2000	2,300	1,537	40.1	61.7
2004	2,750	1,907	40.9	63.3
2008	2,741	2,313	45.8	65.4
2012	2,855	2,247	44.0	66.1
2016	2,864	2,862	50.0	66.9
2020	3,621	4,042	52.7	68.7
2024	3,943	3,766	48.9	68.7

Source: Office of Texas Secretary of State

There was a sharp reversal in 2024. Donald Trump won three of the four big metros, losing only the Austin area. Trump’s success reflected a dramatic improvement in his share of the fast-growing Hispanic vote, coupled with modest gains among Black and Asian American voters. Many of the 2024 Trump minority voters were younger and less well-educated, lending support to analyst Patrick Ruffini’s argument that Donald Trump is building a new Republican populist

² Judis, John B., and Ruy Teixeira. *The Emerging Democratic Majority*. New York: Simon & Schuster, 2002.

coalition that will prove significant for decades to come.³ If Ruffini is right, Texas Republicans should do just fine even as the state's electorate shifts toward the more racially and ethnically diverse large metropolitan areas.

Discussion and Analysis

Does the 2024 election indicate an inflection point, as Ruffini has argued? Did the Trump/Harris election signify not only the dashed hopes of an emerging Democratic majority, but also the emergence of a new Trump multi-racial coalition of non-college educated voters? Of course, only time will tell, but in the meantime, I have doubts. My skepticism is partly based on “thermostatic politics” becoming the new normal in Western democracies.

Thirty years ago, political scientist Christopher Wlezien, a colleague at the University of Houston, formalized the thermostatic model.⁴ Wlezien argued that the public reacts to government policies like a thermostat adjusting a room's temperature. When new policies run “hot” or “cold”, the public reacts to reset the policy temperature back to a more “normal” range. This model, as Alexander Kustov points out, provides insight into one of the most enduring puzzles of democracy: “Governments, no matter what they do, often seem unable to satisfy voters. When governments take actions, the public often seems to want the opposite. Push policies left, and opinions shift right. Increase spending, and people want cuts.”⁵

Three decades of research have validated the power of the thermostatic model in the United States and abroad. The Obama administration moved policy to the left in 2009, and voters reacted by electing a big Republican House majority in the 2010 midterms. Obama narrowly secured a second term, but his preferred successor, Hillary Clinton, was defeated by Donald Trump, an anti-establishment disruptor, in 2016. Voters swung back toward Democrats in the 2018 midterms and ousted President Trump two years later. Biden moved left in office, and voters returned a Republican majority to the U.S. House in 2022 before giving Donald Trump a narrow majority of the popular vote and a decisive win in the Electoral College in November 2024.

If thermostatic politics is the new normal, building *durable* political coalitions is damned hard these days. With many more voters critical of both parties, sharp swings in both voter turnout and partisan voting patterns occur.

Thermostatic politics aside, a number of short-term factors helped the out-party's (Republican) gains in November 2024. The COVID-19 epidemic resulted in massive government spending, first by the Trump administration and then by Biden's. Combined with serious global supply

³Ruffini, Patrick. *Party of the People: Inside the Multiracial Coalition Remaking the GOP*. New York: Simon & Schuster, 2023. He also posts updates on *The Intersection* patrickruffini@substack.com.

⁴ See Wlezien, Christopher. "The Public as Thermostat: Dynamics of Preferences for Spending." *American Politics Quarterly*, vol. 24, 1996.

⁵ Kustov, Alexander. "Good to Know: The Public Is a Thermostat." *Good Authority*, Jan. 3, 2025, p. 2.

chain disruptions, this led to the worst inflation in the U.S. since the early 1980s. Governing parties worldwide—not just in the U.S.—paid a high price at the polls. Add to that in 2024, the Democrats stuck with Joe Biden, an aging incumbent who delivered the worst presidential debate performance in American history. Biden’s late withdrawal was followed by a hurried handoff to Vice President Kamala Harris, whose own presidential campaign had crashed early in the previous cycle. Most important in Texas, in my opinion, was the political malpractice of the Biden-Harris administration in failing to control the Mexican border and mismanaging overall immigration policy.⁶

The result was a crushing Democratic defeat. Joe Biden devoted few resources to Texas in 2020, but the Democratic nominee still lost by just 5.6%, the smallest Democratic presidential deficit since 1992. However, in 2024, Trump added about 500,000 votes to his 2020 total, while Harris got 460,000 fewer votes than Biden received four years earlier. Harris lost by 13.9% in Texas, the weakest Democratic performance in twenty years.

Despite the big 2024 deficit, the thermostatic model offers some hope for a Democratic recovery. Trump 47, by any standard, is running a very “hot” administration. His economic program is centered on an aggressive tariff program returning levies on imported goods to levels not seen since the 1930s. This may lead to lower costs for consumers, as Trump promised in the 2024 campaign. The great majority of economists disagree. Recent polling shows a majority of the public agrees with the economists on this issue and does not see these policies helping their own economic situation. More specifically, as Texas economist M. Ray Perryman recently noted:

Looking at all the proposed tariffs, Texas clearly has the most to lose. First, we lead the nation in exports thanks to our major land ports, seaports and international airports. We also have strong manufacturing ties with Mexico, where goods cross the border multiple times during production cycles. In short, the state is deeply exposed to the results of a trade war.⁷

⁶ I do not use the term *political malpractice* lightly. Consider just a few of the border/immigration missteps. Unlike Bill Clinton and Barack Obama, who maintained aggressive deportation programs, President Joe Biden immediately relaxed the policies President Trump had put in place. Undocumented border crossings predictably surged. When Governor Abbott began busing thousands of migrants to New York City, Chicago, and Denver, the Biden-Harris administration dismissed this as a stunt. Well, the “stunt” worked at both ends. Abbott’s Operation Lone Star was popular in Texas and helped him beat back a serious challenger (Beto O’Rourke) in the 2022 election. And the thousands of migrants arriving in New York and other cities produced a backlash. Local voters in these heavily Democratic cities, including minorities, saw scarce resources diverted to help newcomers. Sharp warnings from elected Democrats on the border, like Laredo Congressman Henry Cuellar, were ignored as President Biden gambled that the emerging crisis could lead to historic new immigration legislation – the first since 1986. That bet failed, and only in the last year of his presidency did Biden use his executive powers, ala Trump, to effectively close the border. Too little, too late. Trump racked up huge gains in border counties and cut Democratic margins in the Texas Triangle by running much stronger in minority precincts in 2024 than he had in 2020.

⁷ Perryman, M. Ray. “Why tariffs hit the Texas economy and jobs extra hard.” *Houston Chronicle*, July 26, 2025.

Similarly, the One Big Beautiful Bill passed by Congress and signed by President Trump on July 4, 2025, polls poorly, with about 60% opposed to 40% approving. The negative reaction to the OBBB is one key in Trump's decline in job approval regarding his management of the economy.

Summer opinion polls aside, President Trump's economic policies may produce a "Golden Age." If that happens, it will be very difficult for Texas Democrats to challenge Republican dominance in Texas, even as the Anglo share of voters continues to shrink. But, as Perryman points out, Trump's tariff policies pose high risks to the Texas economy, especially in the fast-growing metropolitan areas where most voters now live. More and more of these voters are minorities, with the fastest-growing populations being of Hispanic and Asian origin. These new Texans have little attachment to the traditional cultural and political values of 20th-century Texas that helped sustain Republican dominance. The newcomers came for jobs, not to enlist in culture wars.

Which brings me to the second vulnerability of Texas Republicans: President Trump's aggressive deportation policy. Immigration was a great issue for Trump and Republicans in 2024. President Trump has, as promised, closed the border. That draws strong support in the nation and Texas. But as undocumented border crossings drop to near zero, the focus shifts to the massive deportation effort now fully funded by the OBBB law. Texans are far less supportive of this removal effort as it expands beyond persons with criminal records to all undocumented immigrants. A recent study by the Kinder Institute at Rice University, for example, found 70% of respondents in the Houston area favored "increase pathways to citizenship" compared to just 22% who preferred "enact mass deportations." Even among self-identified conservatives, 47% chose pathways to citizenship, compared to 45% supporting mass deportations.⁸ The unpopularity of the aggressive deportation will likely only increase as the administration proceeds with projects like a billion-dollar detention center at Fort Bliss in El Paso.

This deportation project, the largest since the Eisenhower administration's "Operation Wetback" in the mid-1950s, threatens the Texas "economic miracle." Estimates place the undocumented population in Texas between 2 million and 2.5 million. The great majority of undocumented adults in Texas are employed – many in vital occupations like crop harvesting, construction, meat processing and elder care that native Texans increasingly shun. Removing these workers will throw a very big monkey wrench into the entire Texas economy. Despite growing unpopularity, reversing direction on immigration will be extremely difficult for the Trump administration. Much of the MAGA base is strongly committed to aggressive removal, and the cause has outspoken advocates like Steve Bannon, Anne Coulter and Marjorie Taylor Greene who have President Trump's ear.

⁸ Delisi, Anna G., Karen Pren Goolsby and Daniel Porter. "Attitudes toward mass deportation and immigration policy preferences: Insights from the Greater Houston Area." *Kinder Institute for Urban Research*, 2025. <https://doi.org/10.2561/VWA.s189>

The result is an economic “twofer” in Texas: disruption tariffs and mass deportations is putting decades of economic and job growth at risk in the Lone Star State. And it has been that economic success, in my opinion, that has most frustrated Democratic challenges to Republicans in Texas since the 1990s. Not ending legal abortions. Or posting the Ten Commandments in public schools. Or attacking wokeism. Or legislating who can use which bathroom. Rather, it has been steady job growth for three decades that has provided the foundation for Republicans to maintain their political dominance even as the state’s electorate has become much larger, more racially and ethnically diverse, and increasingly residing in the big metropolitan areas.

Will a blue national wave be enough to put Texas in play next year? Most analysts think not, and rate the state as solidly red. I disagree. In addition to the high-risk economic and immigration policies Trump is pursuing, several short-term developments favor a “thermostatic adjustment” in 2026. Three are worth mentioning. First, the 2026 U.S. Senate Republican Primary seems headed to a bitter and expensive intraparty battle that could yield a damaged nominee and give Democrats the best opportunity to win a statewide office since 1994. Second, the Texas GOP agreed to President Trump’s demand that legislators enact a mid-decade congressional map. That map, as I have stated in a recent court filing by the Texas NAACP, clearly reduces the opportunities for Texas Black and Hispanic voters to elect candidates of their choice to Congress. Minority voters in Texas who moved from Biden in 2020 to Trump in 2024 might notice. Three, President Trump’s popularity in the state has been drifting into the red. Historically, presidential popularity – or unpopularity – is the single biggest predictor of midterm elections. There is no reason to think things will be different in 2026.

Thirty-plus years ago, Democratic consultant James Carville, a fellow Louisianian and graduate of LSU, stressed to his colleagues in the Bill Clinton presidential campaign: “It’s the economy, stupid, and don’t forget about health care.” In 2025, Texas voters’ concerns remain mostly focused on the economy, but immigration policy is a growing concern. These issues, plus infighting within the Republican Party, give Democrats an opportunity in the next elections. Can they capitalize? Maybe—maybe not—but it makes the upcoming Texas elections a lot more interesting than is usually the case.

As we move deeper into the first year of Trump’s second administration, a key voter group to focus on in Texas will be Hispanics, who are predominantly of Mexican origin. Our October letter will focus on the history of Latino voting in Texas and explain why they will play a critical role in the 2026 midterms.

We’d love to hear your thoughts, questions, or perspectives on these issues. Please don’t hesitate to reach out to us at murraytx@cougarnet.uh.edu; your input helps inform our work and keeps the conversation going.

Savannah Sipole and Renée Cross contributed to this report. Suggested citation: University of Houston Hobby School of Public Affairs, September 2025, “Letter from Texas”