



FAR WEST TEXAS



THE WEST TEXAS ROAD TO ECONOMIC GROWTH:

West Texas Comprehensive Economic Development Strategy





West Texas Economic Development District COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY: 2016-2020

Table of Contents

Section I: Executive Summary

Introduction	7
Summary of Existing Conditions	8
Economic Opportunities and Barriers	9
Regional Vision and Strategic Recommendations	10
Transforming the Regional Economy	11

Section II: Summary Background

State of the Region

Population Trends	12
Education and Income	19
Labor Force, Employment, and Wages	22
Housing and Transportation	27
Health	31
Infrastructure	32
Natural Resources	36

Principal Growth Sectors and Clusters

Government, Private, and Farm Employment	37
WTEDD Urban County Industry Clusters	38
WTEDD Rural County Industry Clusters	41

Table of Contents

Section III: Regional SWOT Analysis

Urban Counties Strengths and Weaknesses	46
Urban Counties Opportunities and Threats	47
Rural Counties Strengths and Weaknesses	48
Rural Counties Opportunities and Threats	49

Section IV: Strategic Direction and Action Plan

Regional Vision and Strategic Recommendations	50
Recommendation 1: Increase Economic Ties with Mexico and Latin America	51
Recommendation 2: Increase Cooperation between Local Economies	52
Recommendation 3: Become Known for Quality	53
Recommendation 4: Increase Investments in Broadband, Solar Energy, and Public Infrastructure	54
Recommendation 5: Leverage the Significant Military Presence in the Region	55
Recommendation 6: Alleviate Regional Housing Issues	56
Recommendation 7: Strengthen the Region's Position as a Tourist and Retail Destination	57
Recommendation 8: Spur Innovation and Entrepreneurialism	58
Recommendation 9: Promote Economic Resiliency	59

Section V: Performance Measures

Plan Implementation	60
Ongoing Public Participation	61
Performance Updates	62

ACKNOWLEDGEMENTS

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SECTION I: Executive Summary

Introduction

The Comprehensive Economic Development Strategy (CEDS) is the result of an ongoing planning process that requires the participation and input of the public and private sectors, along with the communities of a region. The CEDS is designed to guide economic growth by fostering a more diverse, stable, and resilient economy, to assist in the creation of jobs, and improve the quality of life for residents living in the West Texas Economic Development District (WTEDD).

The WTEDD is part of the Rio Grande Council of Governments (RGCOG), a multijurisdictional organization comprised of El Paso, Hudspeth, Culberson, Jeff Davis, Presidio, and Brewster counties in Texas, and Doña Ana County in New Mexico. The RGCOG is governed by a board of directors that is comprised of 19 local officials from the region. The RGCOG also provides administrative and operational staff support for the WTEDD.

In accordance with the Economic Development Reform Act of 1998 (P.L. 105-393), any area, community, or region that is applying for assistance from the U.S. Economic Development Administration (EDA) requires that the region develop, maintain, and update a CEDS. This document has been prepared with financial assistance from EDA.

Spearheading the CEDS process is the CEDS Strategy Committee, a collaborative exchange group composed of community leaders, economic development professionals, innovators at the forefront of their fields, and scholars and researchers from the region's universities, and members of the general public. The CEDS and the CEDS Strategy Committee coordinate the efforts of individuals, organizations, local governments, and private industry in the area of economic development.

The CEDS presents a regional economic development strategy that addresses challenges, leverages opportunities, and is focused on measurable return on investment and results. It serves as a guide for establishing regional goals and objectives, developing and implementing a regional plan of action, and identifying investment priorities and funding sources. As a results-driven plan, the CEDS serves a critical role in the region's efforts to compete across state, national, and global markets. Finally, the CEDS is an evolving document that will take into account and, where appropriate, integrate or leverage other regional planning efforts.



Summary of Existing Conditions

The WTEDD Region incorporates an area of 32,143 square miles and includes two states and eight counties. The region is known for its booming ports of entry, nationally-recognized universities, significant military presence, vast natural resources, plentiful sun, pristine deserts, and mountainous landscapes.

The WTEDD region has a total population of 1,103,096 (2014) that grew by 13.3% in just the last 10 years. Across the U.S.-Mexico border, a population of 1,440,669 resides in the *municipios* of Ciudad Juárez and Manuel Ojinaga. The region is characterized by significant economic, educational, health, and social interdependence. Many people living in border communities have families and businesses on the opposite side, commute daily to school or work, and own homes on both sides of the border.

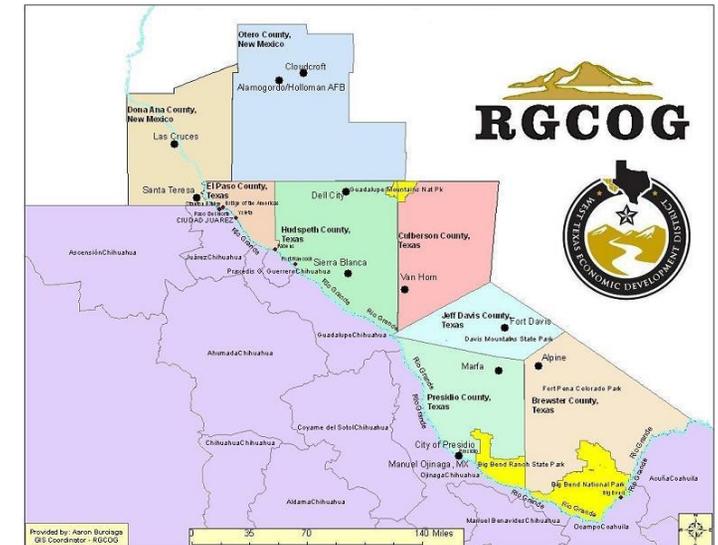
The cities of El Paso, Texas and Las Cruces, New Mexico are fast-growing metropolitan areas with multiple growing industry clusters that have embraced innovation and have developed an increasingly outward view towards global markets with over \$25 billion in exports. The region is also home to Fort Bliss, White Sands Missile Range, and Holloman Air Force, which have a combined economic impact of over \$20 billion.

In the rural counties, vast areas of open land, popular hiking and camping areas, and beautiful state and national parks are assets leveraged by strong tourism and travel industries. Agriculture flourishes along the Rio Grande River and cattle ranching thrives in areas between mountain ranges suitable for foraging.

Although wages and income are not have not yet reached state and national levels, unemployment is low in most of the region and educational attainment is increasing rapidly. The regional community colleges and universities have developed highly-specialized education programs used to attract new employers in the advanced manufacturing, defense, and health industries. A recently-established medical school, an upcoming dental school, and an airport technology and research acceleration park are among the latest projects in the region.

The region also offers relatively inexpensive land and housing prices in comparison with larger metropolitan areas across the United States. Several major and state highways connect the region to the rest of the nation, leading to the presence of a strong logistics/transportation industry. Located in a strategically-ideal location for national and binational rail trade, the region is also home to BNSF Railway, Union Pacific Railroad, and the Southern Pacific Transportation Company in the United States and Ferromex in Mexico.

The WTEDD Region



Economic Development Opportunities and Barriers

Through the SWOT (strengths, weaknesses, opportunities, and threats) analysis process, the WTEDD Strategy Committee identified a series of core regional characteristics under the lens of economic development and quality of life improvements allowing the region to take advantage of its strengths, address weaknesses, capitalize on opportunities, and deter threats. These have been separated between the urban WTEDD counties and the rural WTEDD counties to better explore the economic opportunities and barriers impacting each region.

Key SWOT components are described in this section. A more comprehensive list is also available in a subsequent section in this document.

Extensive data collection was performed to guide the SWOT analysis process, exploring regional trends in population demographics, education, income, labor force, jobs and employment, housing, transportation, public health, infrastructure, natural resources, and business growth and clustering.

A benefit of the SWOT analysis process was that it created a channel for dialogue between stakeholders in different states, different time zones, and at times working in different countries to talk about common regional issues and objectives. It revealed that communities across the WTEDD region are more similar than they are different.

STRENGTHS

- Land, sun, and good weather
- Central geographic location
- Military complex
- Strong collaborations
- Trade with Mexico
- Bicultural and bilingual workforce
- Strong education programs
- Cooperation between law enforcement and their communities
- Strong cultural and natural assets suited for tourism

OPPORTUNITIES

- Increase participation in international markets
- Further leverage military complex and veteran services
- Leverage historical, cultural, and natural assets
- Clean energy production
- Make border crossing improvements
- Take advantage of ongoing infrastructure investments
- Attract new industry due to quality-of-life investments

WEAKNESSES

- Inefficient border
- Access to capital
- Negative perceptions of low quality and high crime
- High poverty rates
- Low education rates
- Outflow of skilled and educated workforce
- Need for infrastructure development, including broadband and telecommunications
- Non-assimilated border patrol and homeland security

THREATS

- BRAC downsizing
- Disadvantageous state budgets
- Dependence on federal revenue for community and economic development
- No duplication of utilities in rural regions
- Depopulation in rural regions
- Lack of industry diversification

REGIONAL VISION

The West Texas Economic Development District (WTEDD) region will become a preferred location for businesses and entrepreneurs looking for:

- A unique region proud of its identity and cultural heritage,
- A dynamic, globally-competitive workforce,
- World-class public infrastructure,
- High quality of life for new and existing residents, and
- A supportive environment that is conducive to strong, sustainable, and resilient economic growth and prosperity.

This vision builds upon a strong foundation composed of years of work and leadership from local community and economic development stakeholders, existing businesses, higher education institutions, and communities within the WTEDD region.

STRATEGIC RECOMMENDATIONS

As the CEDS Strategy Committee worked through the SWOT process, discussion over economic, workforce, and infrastructure development, affordable market-rate and low-income housing, and quality of life led to the creation of ten Strategic Recommendations and their respective goals and performance measures. Many of these recommendations come from the strategic planning process of key regional economic development players such as the [Borderplex Alliance](#), [Workforce Solutions Borderplex](#), [the City of El Paso](#), the University of Texas at El Paso (UTEP) [Hunt Institute for Global Competitiveness](#), New Mexico State University (NMSU) [Arrowhead Center](#), the [Presidio Municipal Development District](#), and from publications and discussions with the different municipalities, chambers of commerce, business development centers, and private businesses in the region.

The CEDS Strategy Committee's 2016-2020 Strategic Recommendations are:

1. Increase [Economic Ties](#) with Mexico and Latin America
2. Increase Cooperation between Local Economies, including [Leveraging Presidio/Ojinaga as a Competitive Gateway for Trade](#)
3. [Become Known for Quality](#) through [Workforce Development](#) and [World-Class Education Programs](#)
4. Increase Investments in [Broadband](#), [Solar Energy](#), and Public Infrastructure
5. Leverage the [Significant Military Presence](#) in the Region
6. Alleviate Regional Housing Issues
7. Strengthen the Region's Position as a [Tourist](#) and [Retail Destination](#)
8. [Spur Innovation and Entrepreneurialism](#)
9. [Promote Economic Resiliency](#)
10. Support the Development of [Texas Target Industry Clusters](#) relevant to the [WTEDD Region](#)

TRANSFORMING THE REGIONAL ECONOMY

The CEDS offers strategic recommendations and actions to support regional growth from its current conditions. Measurable performance metrics are necessary in order to ensure that the recommended Key Actions are implemented by regional stakeholders, economic development projects receive exposure and support, and that results from such projects are quantified. The impact of the CEDS on the region will be evaluated based on the impact, frequency, and the visible progress of relevant initiatives and projects. Additionally, changes in the following core performance metrics will be tracked:

- Number of jobs created at the county level after the implementation of the CEDS
- Monitoring of number, type, and dollar amount of investments made in the region at the county level
- Monitoring of county business patterns to quantify business growth and decline at the county level
- Monitoring of county industry patterns to quantify private job creation and losses at the county level
- Monitoring of county government programs to quantify public job creation and losses at the county level
- Monitoring of economic impact from trade with Mexico to include value of exports, retail, and regional collaborations
- Dollar amount of economic impact of military bases in the region
- Changes in employment and unemployment
- Changes in average hourly wages
- Changes in poverty rates
- Changes in median household income
- Changes in per capita income
- Changes in educational attainment of 25-44 demographic
- Changes in county population
- Changes in housing occupancy rates and housing costs at the county level
- Changes in health insurance coverage
- Quality of Life and Well-Being measures as described in Healthy People 2020's [County Health Rankings](#)
- Return on Investment (ROI) on WTEDD initiatives

The CEDS is an evolving document intended to foster meaningful and sustainable grassroots collaboration across public, private, nonprofit, and traditional and non-traditional political boundaries. As such, the CEDS will be revised on a yearly basis, to include the updating of Strategic Recommendations and every component in the CEDS document.

The CEDS Strategy Committee will reconvene at least four times per year to evaluate the effectiveness of the 2016-2020 Strategic Recommendations and their respective Key Actions as written. Regional economic and community development projects throughout the region will be examined for congruency to the 2016-2020 Strategic Recommendations. County-level changes in the aforementioned performance measures will be reviewed as part of the evaluation process based on the availability of new data.

The 2016-2020 CEDS process involved an ongoing public participation process where a broad and diverse set of stakeholders were engaged to address economic problems and leverage economic opportunities in the WTEDD region. WTEDD staff traveled across the region to inform city and county governments of the CEDS process, to gather input about the needs, goals, and strategies of each municipality, and to engage public officials and staff as Strategy Committee members. Additionally, WTEDD staff engaged stakeholders from the private sector working in the health, tourism, retail, and business industries.

These actions come together to create an improved business climate, support sustainable economic growth, continued workforce and infrastructure development, increased community vitality and quality of life, and other factors needed to resolve critical issues impeding growth and factors necessary to foster economic vitality and wealth creation in the WTEDD region.

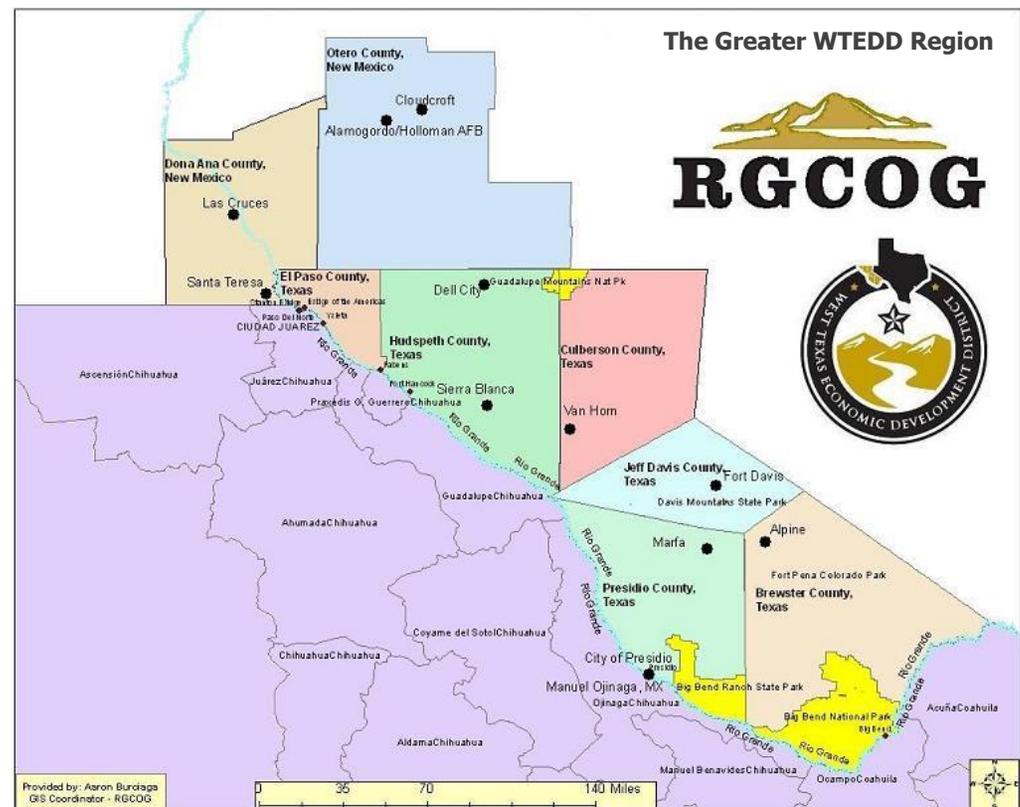
SECTION II: Summary Background

The West Texas Economic Development District (WTEDD) region includes El Paso, Hudspeth, Culberson, Jeff Davis, Presidio, and Brewster Counties in Texas, and Doña Ana and Otero Counties in New Mexico. The municipios of Ciudad Juárez and Manuel Ojinaga in Mexico are also included as part of the regional analysis as the Greater WTEDD Region.

This Greater WTEDD region incorporates an area of 37,684 square miles, includes three states and two countries, and is characterized by significant economic, educational, health, and social interdependence. The region lies within the Chihuahuan Desert and is the most arid portion of Texas and New Mexico.

The following State of the Region section highlights key economic factors such as population and population projections, education and income levels, labor force, employment and unemployment trends, regional housing markets and transportation, the health of the population, infrastructure, and natural resources. When comparisons are possible, datasets from WTEDD counties will be juxtaposed with data from the municipios of Ciudad Juárez and Manuel Ojinaga.

The WTEDD counties classified as urban are El Paso, Doña Ana, and Otero, characterized by each having more than 50,000 residents. The rural WTEDD counties are Brewster, Culberson, Hudspeth, Jeff Davis, and Presidio. In this document, most datasets and visualizations will be separated between rural and urban counties to better explore the diverse issues affecting each group, as well as to present data in the format that most benefits economic development projects, and regional use.



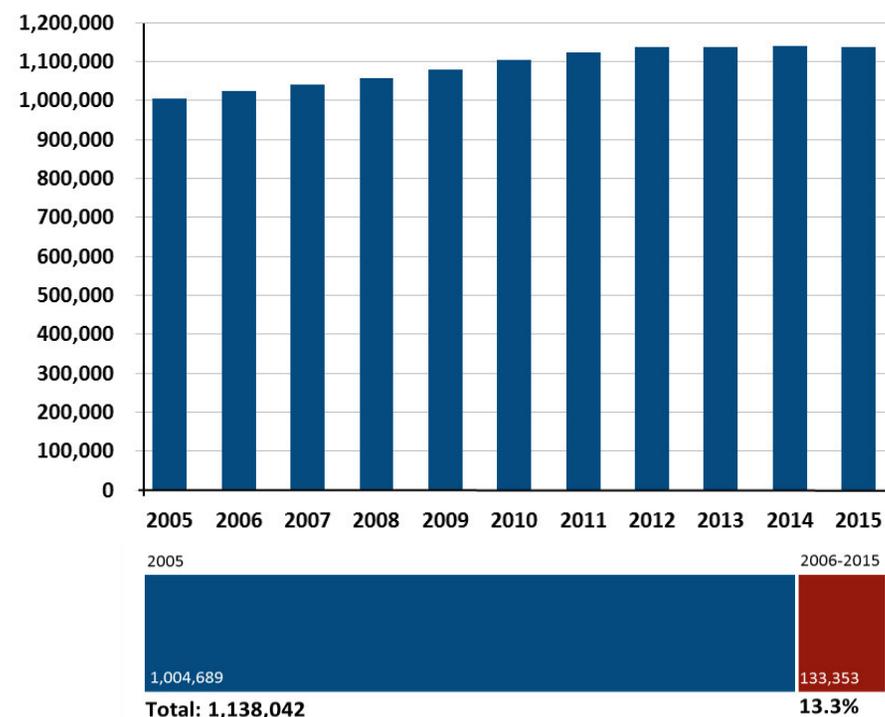
State of the Region: Population Trends

As of 2015, the total population in the West Texas Economic Development (WTEDD) region has grown to exceed 1.1 million. 13.3% of this growth occurred between 2006 and 2015. The population growth rate slowed in the years following the Great Recession (2007-2009). The slowdown is attributed to decreased immigration and an outflow of young, working-age people to other regions in Texas and the United States with higher employment rates and higher average salaries.

The largest population centers in the region are the City of El Paso in El Paso County, the City of Las Cruces in Doña Ana County, and the City of Alamogordo in Otero County. Across the Border, the municipios of Ciudad Juárez and Manuel Ojinaga are the largest population centers. With the exception of Alamogordo, all of the major population centers in the region are situated along the Rio Grande River.

A total of 372 Colonias exist in counties along the Rio Grande River, not counting those on the Mexican side of the border ([Rural Community Assistance Partnership 2015](#)). The region is sparsely populated in areas outside of major cities and the suburbs between them, with a population density a little over one person per square mile.

WTEDD Regional Population Growth (2005-2015)



U.S. Census Bureau: American Fact Finder

Greater WTEDD Region Population per Square Mile (2015)

Region	WTEDD Region, including TX and NM Counties	WTEDD TX Counties	WTEDD TX excluding El Paso	El Paso	Brewster	Culberson	Hudspeth	Jeff Davis	Presidio	Texas
Total population	1,138,042	859,385	23,792	835,593	9,145	2,236	3,379	2,156	6,876	27,469,114
Land area (square miles)	32,143	21,710	20,696	1,014	6,192	3,812	4,571	2,265	3,856	261,232
Persons per square mile	35.4	39.6	1.1	824.1	1.5	0.6	0.7	1.0	1.8	105.2
Region	Greater WTEDD Total, including Chihuahua Municipios	WTEDD NM Counties Total	Doña Ana	Otero	New Mexico	Chihuahua Municipios Total	Ciudad Juarez	Manuel Ojinaga		
Total population	2,543,765	278,657	214,295	64,362	2,085,109	1,440,669	1,409,987	30,682		
Land area (square miles)	37,684	10,433	3,807	6,626	121,298	5,541	1,873	3,668		
Persons per square mile	67.5	26.7	56.3	9.7	17.2	260.0	752.8	8.4		

U.S. Census Bureau: American Fact Finder 2015 Population Estimates; SECOB CONAPO: Proyecciones de Población

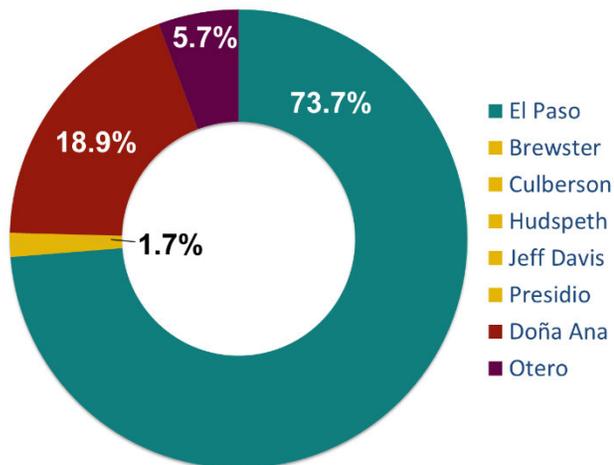
WTEDD Regional vs. State Population (2015)



The Texas WTEDD counties combined account for only 3.13% of the total population in the State of Texas, yet account for over 8.3% of the total land area. Doña Ana and Otero Counties account for 13.3% of the total population in New Mexico, and similarly account for 8.6% of the state’s total land area.

The City of El Paso is closer to the capitals of New Mexico and Arizona than it is to the capital of Texas. Santa Fe, New Mexico is 272 miles away, and Phoenix, Arizona is 348 miles away, while Austin, Texas is 526 miles away from El Paso. This geographic isolation has had a visible impact on in-state migration, out-of-state migration, and the development of economic, cultural, and social bonds that are closer to Mexico, New Mexico, and Arizona than to many other regions in Texas.

WTEDD Population by County (2015)



*U.S. Census Bureau: American Fact Finder
2015 Population Estimates*

The WTEDD region also continues to urbanize. Incorporated municipalities and census-designated areas surrounding the City of El Paso, the City of Las Cruces, and the City of Alamogordo have seen substantial growth in the last ten years. The City of Anthony, New Mexico incorporated in 2010 and the City of San Elizario incorporated in 2014.

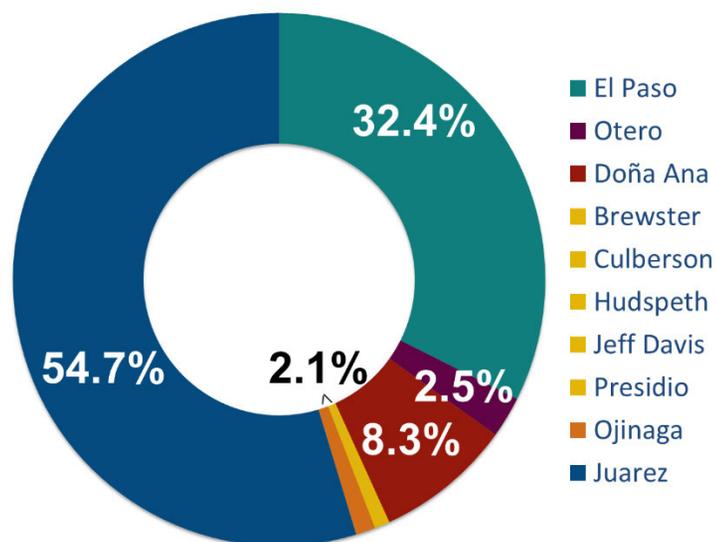
73.7% of the total population in the WTEDD region lives in El Paso County. As of 2015, 85% of the population lives within the El Paso city limits, compared to 81% in 2010.

18.9% of the total WTEDD population lives in Doña Ana County. 47% of the population in Doña Ana County lives within the Las Cruces city limits as of 2015, compared to 45% in 2010.

5.7% of the total WTEDD population lives in Otero County. As of 2010, 47% of the population in Otero County lives within the City of Alamogordo, with no recent changes.

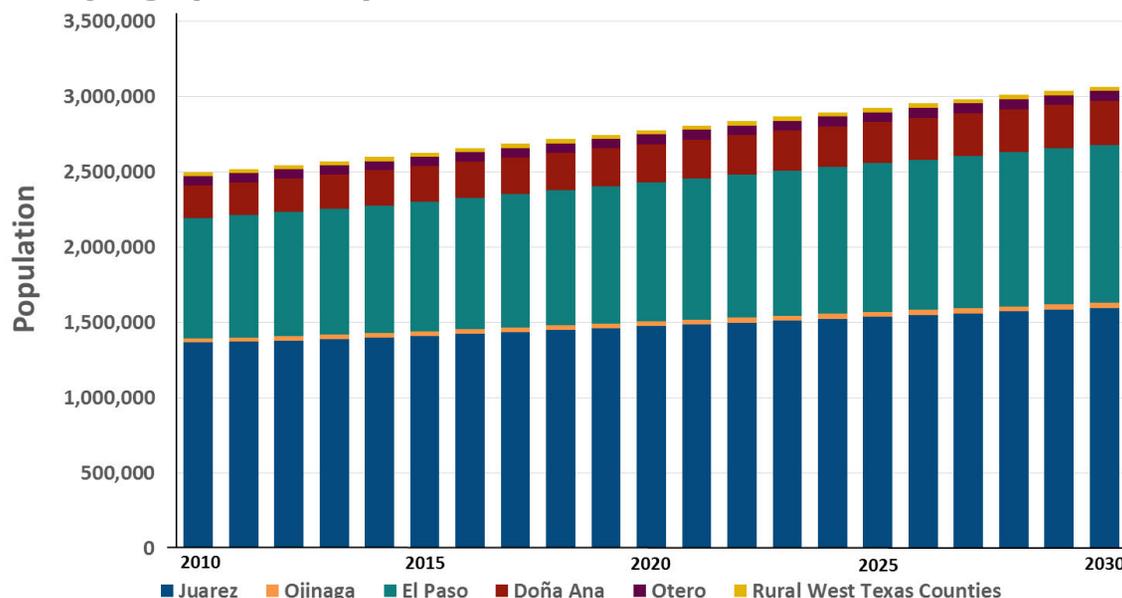
Although the Counties of Brewster, Culberson, Hudspeth, Jeff Davis, and Presidio account for 64% of the total WTEDD land area and 95% of the WTEDD land area in Texas, only 1.7% of total WTEDD population resides in these counties.

Total Population by County, including Juárez and Ojinaga (2015)



U.S. Census Bureau: American Fact Finder 2015 Population Estimates; Texas Demographic Center 2014 County Population Estimates; The University of New Mexico Bureau of Business & Economic Research August 2008 Population Projections; SECOB CONAPO: Proyecciones de población 2010-2030

Projected Population Growth in WTEDD Counties, including Juárez and Ojinaga (2010-2030)

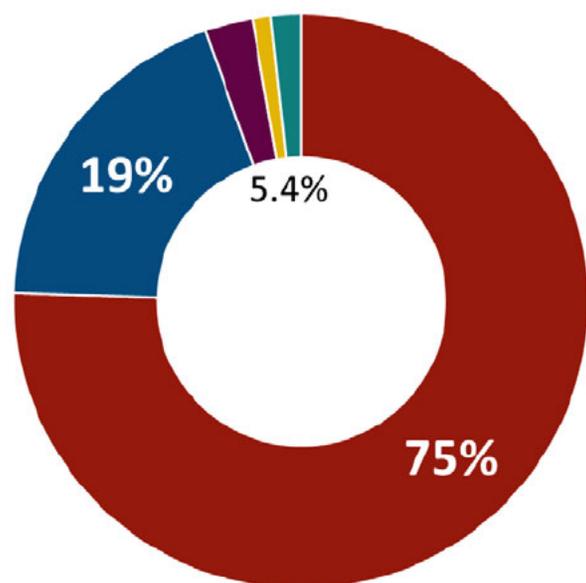
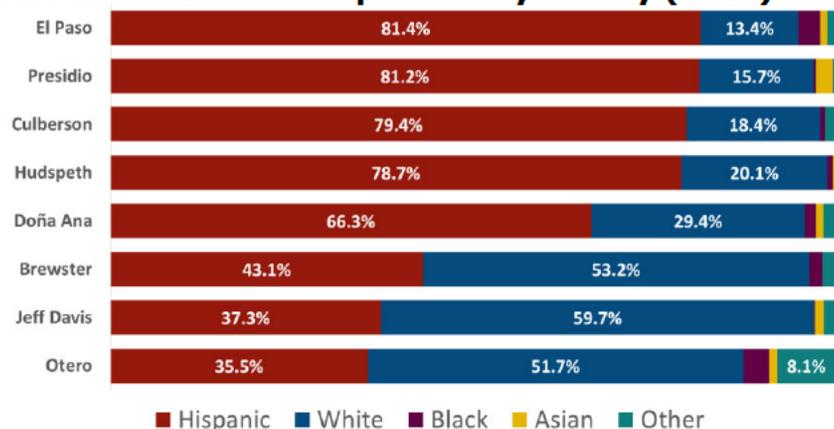


.5 migration scenarios used. Differences in the methodology used to create projections between agencies in the United States and Mexico may limit the accuracy of this analysis.

Differences in census and projections methodology used by the U.S. Census Bureau and the Consejo Nacional de Población (CONAPO) limit the capacity of WTEDD staff to perform cross-analyses. Despite these limitations, it is important to incorporate the best available data in order to capture the significant economic, educational, health, and social interdependence between the region’s border communities. It is important to note that the data presented does not reflect the transitional nature of the region’s population. Many people living in the border communities have families and businesses on the opposite side, commute daily to school or work, and own homes on both sides of the border.

The total combined population of the WTEDD and the two border communities in Mexico is 2,543,765. 54.7% of the combined population lives in the municipio of Ciudad Juárez. El Paso County, in comparison, encompasses 32.4%. Doña Ana and Otero Counties in New Mexico together account for almost 11%. Brewster, Culberson, Hudspeth, Jeff Davis, and Presidio Counties, along with Ojinaga, account for 2.1% of the combined population. A cross-analysis of county-level population projections reveals minimal changes in the regional distribution of population in the next decade.

Racial and Ethnic Composition by County (2014)



WTEDD Racial and Ethnic Composition (2014)

U.S. Census Bureau 2014 American Community Survey

The majority of the population in the WTEDD is of Hispanic origin, consistent with most counties along the U.S.-Mexico border. The Hispanic population in the WTEDD region is also growing faster than other ethnic groups. Greater ethnic diversity exists in the larger population centers, where universities and military installations are located, as opposed to rural areas.

As of 2014, 94% of the total population in the WTEDD region identifies as white, with 75% of these identifying as Hispanic. The percentage of the Hispanic population is highest in El Paso County, where 81.4% of residents identify as white Hispanic.

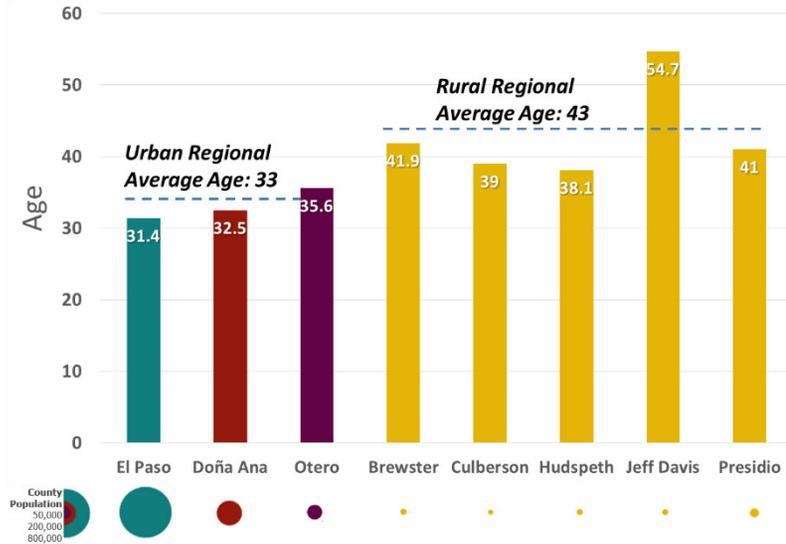
Over 50% of the population in Brewster, Jeff Davis, and Otero Counties identifies as Non-Hispanic white. In Otero County, 5.8% of the population identifies as Native American.

WTEDD Population Racial and Ethnic Composition (2014)

County	Hispanic	White	Black	Asian	Other
Urban					
El Paso	670946	110287	24393	8331	9905
Doña Ana	141087	62649	3223	2291	3692
Otero	23230	33794	2350	721	5320
Total	835263	206730	29966	11343	18917
Rural					
Brewster	3996	4933	168	0	173
Culberson	1847	427	16	0	35
Hudspeth	2634	671	23	16	0
Jeff Davis	852	1363	3	30	34
Presidio	6072	1171	19	175	42
Total	15401	8565	229	221	284

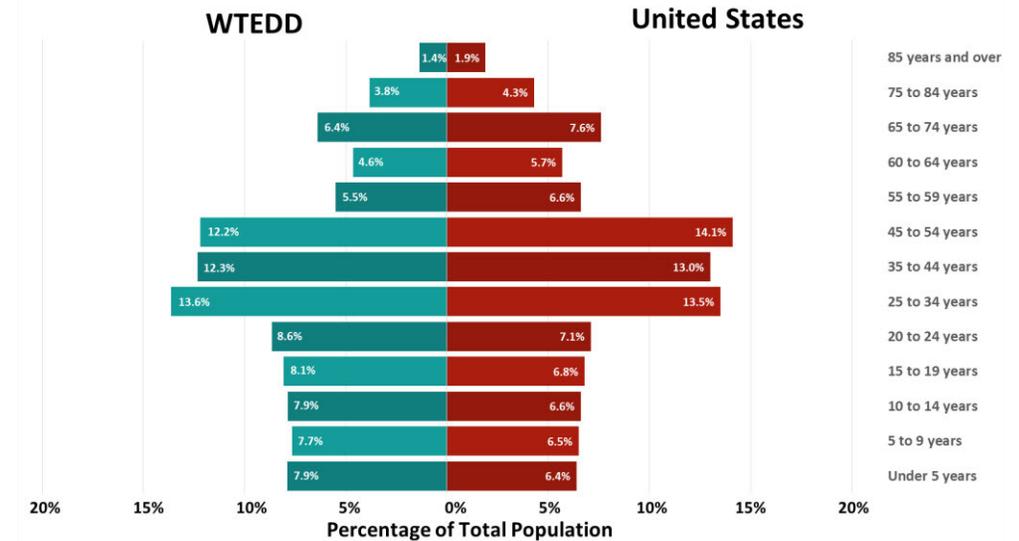
U.S. Census Bureau 2014 American Community Survey

Median Age by County (2014)



U.S. Census Bureau 2014 American Community Survey

WTEDD Regional vs. National Age Distribution (2014)

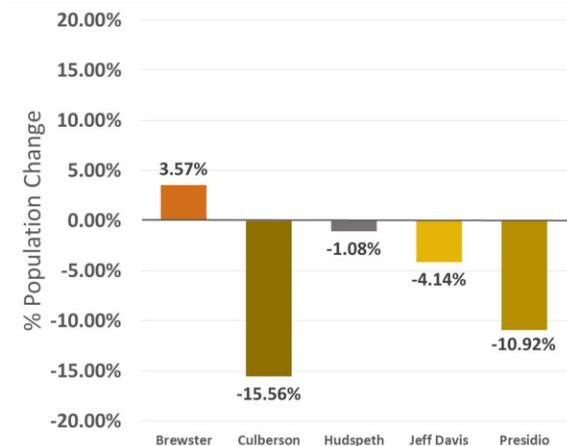


The median age for the United States as a whole has increased in the last decade, reaching 37.4 years in 2014. The population of the WTEDD urban counties is younger compared to the population of the United States. In contrast, the population of the WTEDD rural counties is older.

Consistent with trends across the United States, population growth among Hispanics in the WTEDD region was fueled primarily by natural increase (births minus deaths). Additionally, the percentage of population under 24 years of age in the region combined is 6.8% higher than in the United States.

The population in most of the rural WTEDD counties has decreased since 2005. The most significant population loss occurred in the age groups ranging from 20 to 34 years of age. High unemployment rates account for some of the outward migration. As the median age in rural WTEDD counties increases, it is expected that the number of births will decrease, furthering the current depopulation trend.

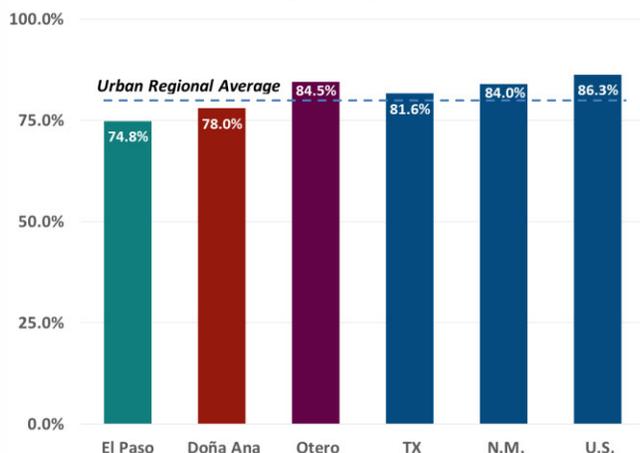
Change in Rural County Population (2005-2015)



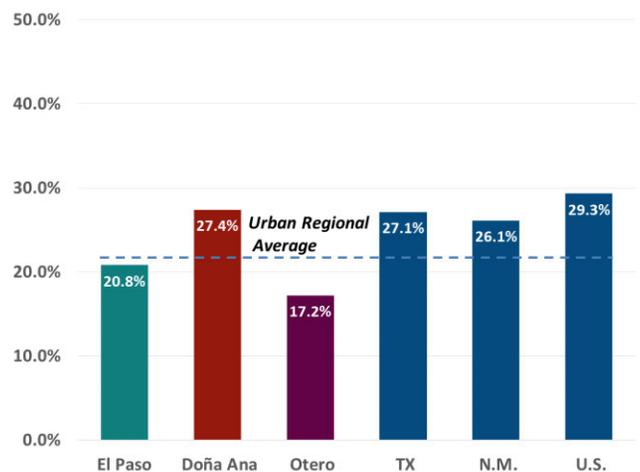
U.S. Census American Fact Finder 2015 Population Estimates; U.S. Census Intercensal Estimates of the Resident Population for Counties: April 1, 2000 to July 1, 2010

State of the Region: Education and Income

High School Educational Attainment in Urban Counties (2014)



College Educational Attainment in Urban Counties (2014)



U.S. Census Bureau 2014 American Community Survey

Historically, high school attainment rates in El Paso and Doña Ana Counties have been lower than the state and national rates, while high school attainment in Otero County has been at or above the state and national attainment rates.

As of 2014, high school attainment rates in El Paso, Doña Ana, and Otero Counties have progressed almost to the state and national levels. In all three counties, high school attainment rates in the 18-24 age group is higher than the state and national rates in the same age group.

College attainment rates have been substantially lower in El Paso and Otero Counties compared to their respective state rates. Doña Ana County has college attainment rates at or above those of New Mexico. However, college attainment rates in all three counties are substantially lower than the national rate.

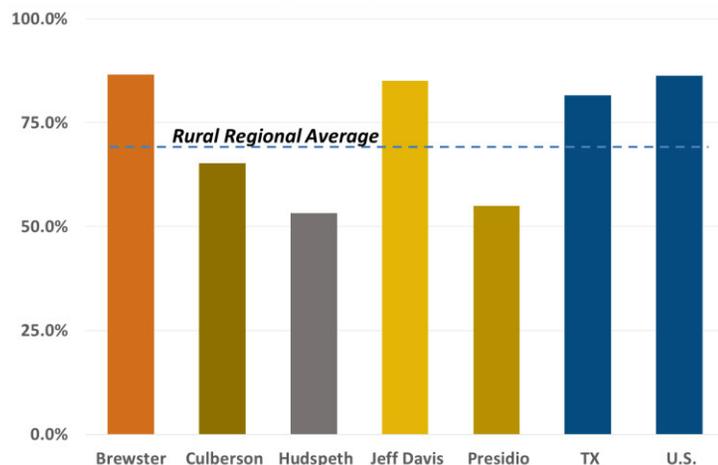
High school attainment rates in El Paso, Doña Ana, and Otero Counties are consistent with rates in counties along the U.S.-Mexico border and in areas with high poverty rates across the United States. El Paso and Doña Ana Counties have college attainment rates that are at or above the majority of counties along the U.S.-Mexico border.

High School and College Educational Attainment by Age Group (2014)

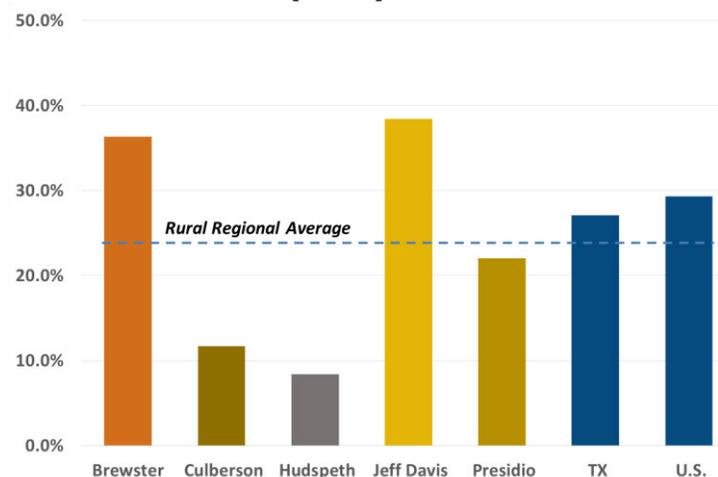
	El Paso	Doña Ana	Otero	Texas	New Mexico	United States
High school, some college, or associate's degree (Age 25+)	74.8%	78.0%	84.5%	81.6%	84.0%	86.3%
Bachelor's degree or higher (Age 25+)	20.8%	27.4%	17.2%	27.1%	26.1%	29.3%
	El Paso	Doña Ana	Otero	Texas	New Mexico	United States
18-24 high school, some college, or associate's degree	79.5%	78.1%	79.8%	74.5%	74.8%	75.3%
18-24 bachelor's degree or higher	5.5%	5.5%	3.7%	7.6%	5.1%	9.6%
25-34 high school, some college, or associate's degree	87.7%	84.8%	84.3%	84.6%	84.9%	88.3%
25-34 bachelor's degree or higher	22.6%	27.5%	13.9%	27.5%	21.7%	32.4%
35-44 high school, some college, or associate's degree	82.5%	79.5%	84.3%	82.0%	84.8%	87.7%
35-44 bachelor's degree or higher	23.8%	26.4%	16.6%	29.1%	25.8%	32.8%
45-64 high school, some college, or associate's degree	73.4%	78.5%	86.2%	82.5%	86.1%	88.0%
45-64 bachelor's degree or higher	21.2%	27.9%	18.7%	27.6%	28.0%	29.1%
65+ high school, some college, or associate's degree	51.4%	59.1%	82.2%	75.2%	78.5%	80.0%
65+ bachelor's degree or higher	13.6%	27.4%	18.3%	23.0%	26.9%	23.2%

U.S. Census Bureau 2014 American Community Survey

High School Educational Attainment in Rural Counties (2014)



College Educational Attainment in Urban Counties (2014)



U.S. Census Bureau 2014 American Community Survey

High school attainment rates in the rural WTEDD counties vary. Brewster and Jeff Davis have high school and college educational attainment rates that are at or above the state and national levels. According to U.S. Census data from 1970 to 2000, Brewster County has historically maintained high school and college attainment rates above the state and national rates.

Culberson, Hudspeth, and Presidio Counties have high school and college educational attainment rates that are substantially below the state and national levels. U.S. Census data from 1970 to 2000 shows a historical trend of low attainment rates in these counties and are consistent with the low attainment rates across other counties along the U.S.-Mexico border.

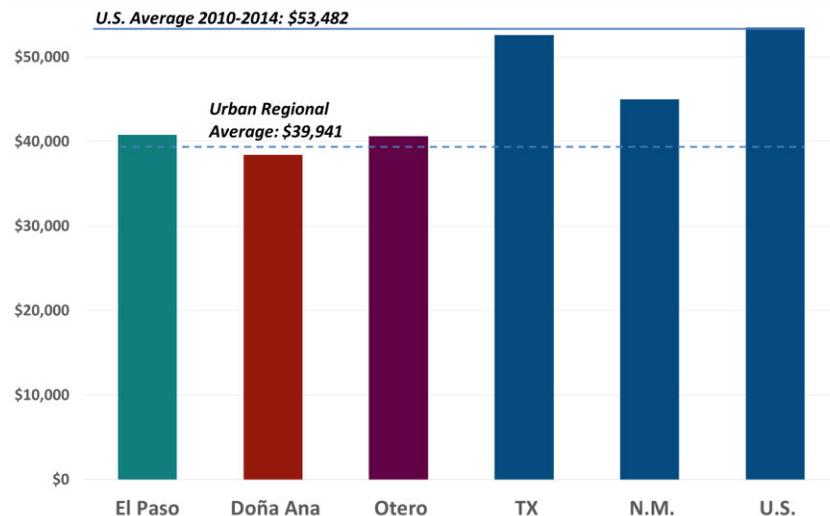
Data from the 2014 American Community Survey shows that high school attainment rates among 20-24 year olds in Presidio and Jeff Davis Counties are substantially lower than the other WTEDD rural counties. This is due in part to a significant decrease in population in that particular age group in both counties. Although there is a general trend of outward migration throughout the WTEDD rural counties in age groups 20-24 and 25-34, the decrease in that population group is higher in Presidio and Jeff Davis Counties.

High School and College Educational Attainment by Age Group (2014)

	Brewster	Culberson	Hudspeth	Jeff Davis	Presidio	Texas	United States
High school, some college, or associate's degree (Age 25+)	86.6%	65.2%	53.2%	85.1%	55.0%	81.6%	86.3%
Bachelor's degree or higher (Age 25+)	36.3%	11.7%	8.4%	38.4%	22.0%	27.1%	29.3%
	Brewster	Culberson	Hudspeth	Jeff Davis	Presidio	Texas	United States
18-24 high school, some college, or associate's degree	77.4%	87.0%	72.7%	41.1%	40.9%	74.5%	75.3%
18-24 bachelor's degree or higher	15.1%	2.4%	2.6%	0.0%	10.9%	7.6%	9.6%
25-34 high school, some college, or associate's degree	93.8%	84.5%	70.6%	67.4%	90.4%	84.6%	88.3%
25-34 bachelor's degree or higher	31.0%	11.7%	3.0%	16.0%	47.6%	27.5%	32.4%
35-44 high school, some college, or associate's degree	94.1%	85.2%	38.8%	79.3%	52.4%	82.0%	87.7%
35-44 bachelor's degree or higher	52.5%	15.2%	4.2%	28.4%	22.5%	29.1%	32.8%
45-64 high school, some college, or associate's degree	86.4%	62.7%	56.7%	88.5%	60.7%	82.5%	88.0%
45-64 bachelor's degree or higher	36.6%	9.5%	10.8%	38.0%	21.7%	27.6%	29.1%
65+ high school, some college, or associate's degree	77.7%	41.1%	42.6%	86.7%	34.3%	75.2%	80.0%
65+ bachelor's degree or higher	28.9%	13.7%	11.5%	45.6%	10.5%	23.0%	23.2%

U.S. Census Bureau 2014 American Community Survey

Median Household Income in Urban Counties (2010-2014)



Median household income is an economic measure used to track regional economic trends and includes wages and salaries, unemployment insurance, disability payments, child support payments received, regular rental receipts, and personal business and investment incomes. Median household income is also used by government programs to determine eligibility, such as nutrition assistance or need-based financial aid.

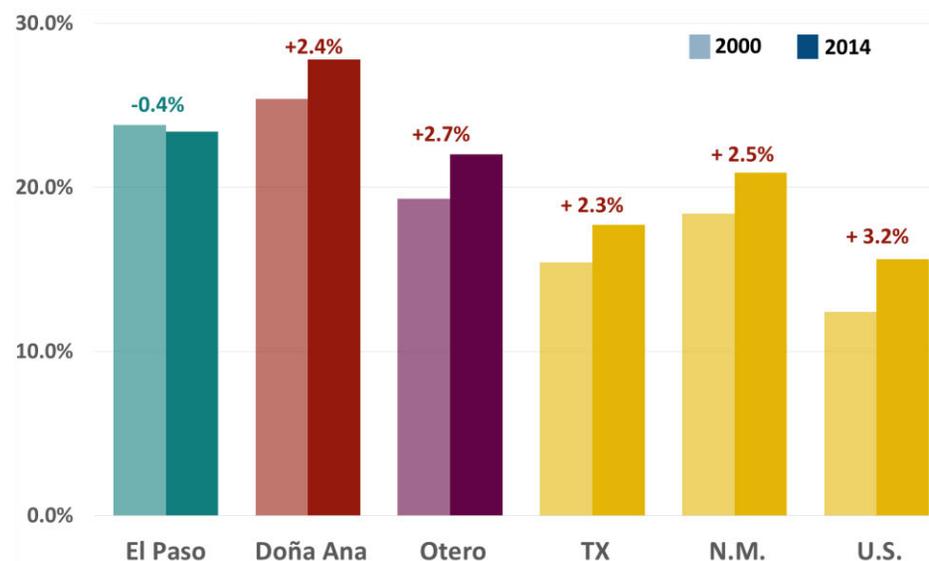
Median household income levels in the urban WTEDD counties are significantly lower than the state and national levels, a trend that began since the 1950's. According to data from the 2014 American Community Survey, after adjusting for inflation from 2005-2015, median household income has increased 16% in the El Paso metro area and 11% in the Las Cruces metro area, compared to 8% in the State of Texas, 0% in the State of New Mexico, and -1% in the United States.

Growth in inflation-adjusted ("real") median household income is attributed to improved economic conditions and increased household sizes.

The 2014 federal poverty level for a family of four was \$23,850. In El Paso County, 23.4% of the population lived below the poverty level (ACS 2014), with a 0.4% reduction since the year 2000 (U.S. Census 2000). In Doña Ana County, 27.8% of the population lived below the poverty level (2014), with a 2.4% increase since 2000. In Otero County, 22% of the population lived below the poverty level (2014), with a 2.7% increase since 2000.

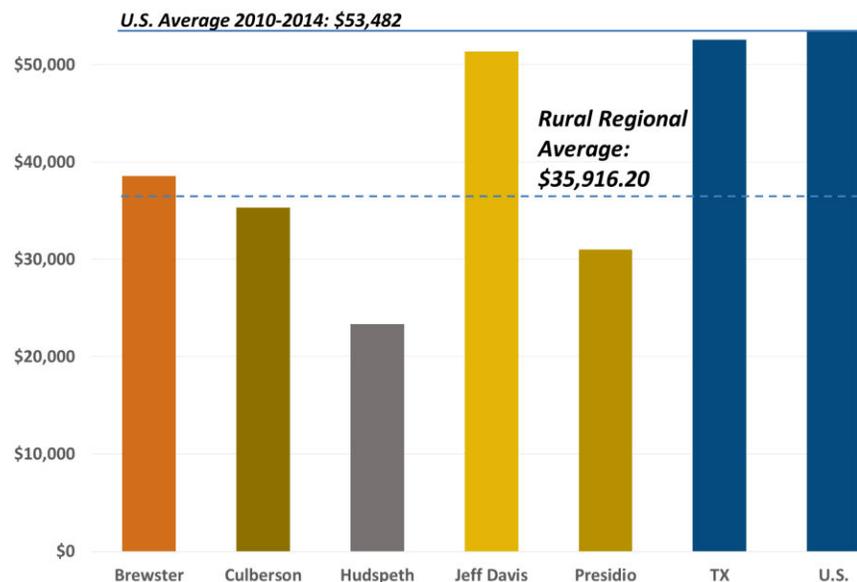
With the exception of El Paso County, the increased poverty rates in Doña Ana and Otero Counties are consistent with state and national trends. A smaller and declining percentage of people in poverty are indicators of wealth in a region.

Poverty Rate and Percentage Change in Urban Counties (2000-2014)



U.S. Census Bureau 2000 Census; 2014 American Community Survey

Median Household Income in Rural Counties (2014)



Median household income levels across the rural WTEDD counties are mixed.

Median household income in Jeff Davis County is comparable to the state and national levels, consistent with other demographic and economic trends that affect income levels such as age, high school and college attainment, and employment rates. Although Brewster County has similar demographics, median household income is significantly lower than Jeff Davis County.

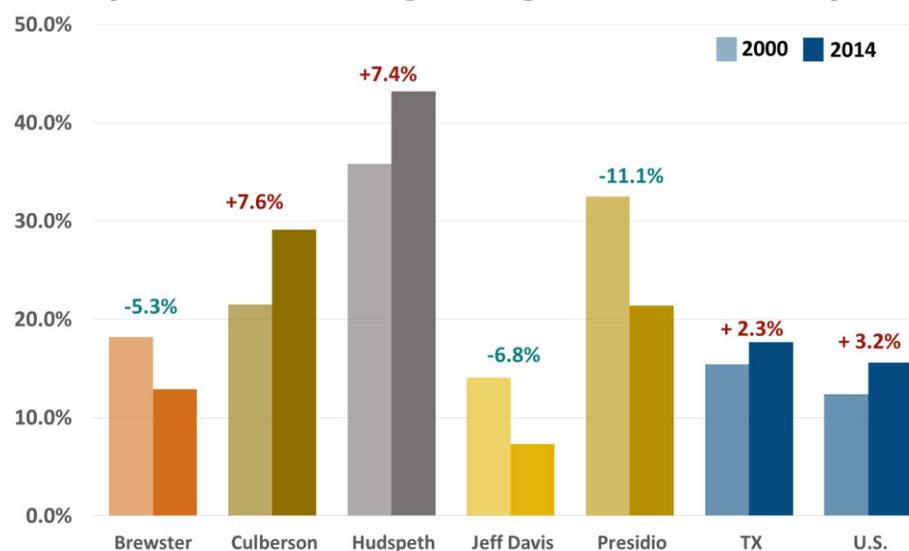
Culberson, Hudspeth, and Presidio Counties are demographically similar. However, Median household income in Culberson higher is higher than in Hudspeth and Presidio Counties.

Median household income levels in Hudspeth and Presidio Counties are consistent with levels found in rural counties across the U.S.-Mexico border.

Poverty rates across the rural WTEDD counties are also mixed. Brewster, Jeff Davis, and Presidio Counties have seen considerable decreases in poverty rates from 2000 to 2014 measures. Hudspeth and Culberson Counties have seen considerable increases in poverty rates, more than three times the increase in the State of Texas and more than twice the increase in the United States.

Trend analysis for median household income levels for the rural WTEDD counties may be skewed as a result of the significant outflow of working-age people to other regions in Texas and the United States. The rural WTEDD counties have significantly smaller populations and economies that may be more demographically impacted by temporary economic shocks and downward trends.

Poverty Rate and Percentage Change in Rural Counties (2000-2014)



U.S. Census Bureau 2000 Census; 2014 American Community

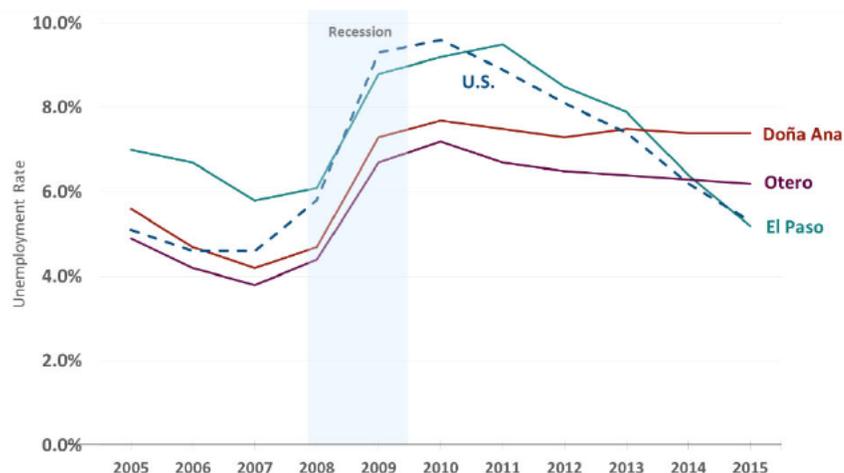
State of the Region: Labor Force, Employment, and Wages

Average Yearly Labor Force in Urban WTEDD Urban Counties (2005-2015)

	El Paso	Doña Ana	Otero	Total
2005	290,010	85,089	26,815	401,914
2006	291,023	85,792	26,045	402,860
2007	291,099	86,938	25,992	404,029
2008	297,690	88,893	25,888	412,471
2009	307,566	90,210	25,939	423,715
2010	340,841	93,661	24,980	459,482
2011	346,748	93,459	24,754	464,961
2012	347,830	93,925	25,121	466,876
2013	348,123	93,800	25,265	467,188
2014	344,563	93,499	24,707	462,769
2015	343,495	93,179	24,709	461,383

Blue = Increase | Red = Decrease

Unemployment Rate (2005-2015)



Texas Workforce Commission Labor Market & Career Information Unemployment LAUS Report; New Mexico Department of Workforce Solutions Economic Data Releases: Annual Averages; U.S. National Bureau of Economic Research

The Bureau of Labor and Statistics (BLS) within the Department of Labor defines the Labor Force as "all individuals 16 years of age or over who are part of the civilian non-institutional population and are either working or looking for work."

Labor force in the WTEDD region is largely concentrated in El Paso and Doña Ana Counties. Labor force has grown in El Paso County by 18% and in Doña Ana County by 8.7% from 2005 to 2015. There have been small declines in labor force in El Paso and Doña Ana Counties for the last two years. Otero County has seen a downward trend in labor force and has decreased by 8% from 2005 to 2015.

The labor force is not growing at rates consistent with population growth compared to other regions in the State of Texas. This can be attributed to an outward migration of the working-age population to other areas in Texas and the United States.

Unemployment rates in the urban WTEDD counties have not followed national trends before, during, and after the 2008 "Great Recession." In El Paso County, unemployment rates were higher before the recession, but have decreased at a rate consistent with national the national rate. In Doña Ana and Otero Counties, unemployment rates were lower prior to the start of the recession, increased during the recession, and have stagnated at recession levels since 2010.

Average Yearly Labor Force in Rural WTEDD Counties (2005-2015)

	Brewster	Culberson	Hudspeth	Jeff Davis	Presidio	Total
2005	5,249	1,648	1,328	1,203	3,241	12,669
2006	5,413	1,636	1,424	1,197	3,214	12,884
2007	5,217	1,752	1,525	1,180	3,209	12,883
2008	5,101	1,754	1,592	1,191	3,343	12,981
2009	5,153	1,809	1,719	1,200	3,744	13,625
2010	4,912	1,032	1,413	1,273	3,743	12,373
2011	4,862	1,018	1,388	1,251	3,781	12,300
2012	4,567	990	1,328	1,216	3,831	11,932
2013	4,166	1,022	1,298	1,165	3,764	11,415
2014	4,067	1,012	1,251	1,147	3,412	10,889
2015	3,913	1,034	1,230	1,089	3,107	10,373

Blue = Increase | Red = Decrease

Labor force in the rural WTEDD counties has been in steady decline since 2005 due to the outward migration of the working age population. The number of people employed has also been decreasing steadily.

Unemployment rates in Hudspeth, Culberson, Brewster, and Jeff Davis Counties have been lower since 2005 compared to national rates. Unemployment was less impacted during the 2008 recession and has returned to post-recession levels.

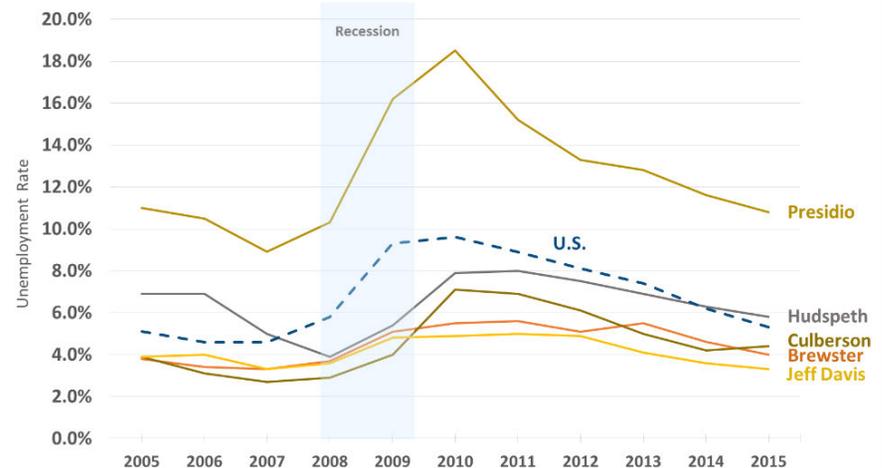
The unemployment rate in Presidio County increased as high as 18.5% in 2010, but has returned to post-recession levels. However, unemployment rates in Presidio County remain significantly higher than regional, state, and national rates.

Total Number of Employed People in Rural WTEDD Counties (2005-2015)

	Brewster	Culberson	Hudspeth	Jeff Davis	Presidio	Total
2005	5,052	1,583	1,236	1,156	2,884	11,911
2006	5,229	1,585	1,326	1,149	2,876	12,165
2007	5,046	1,705	1,449	1,141	2,925	12,266
2008	4,914	1,703	1,530	1,148	2,997	12,292
2009	4,892	1,737	1,626	1,143	3,139	12,537
2010	4,644	959	1,301	1,210	3,052	11,166
2011	4,592	948	1,277	1,189	3,207	11,213
2012	4,335	930	1,229	1,157	3,322	10,973
2013	3,937	971	1,208	1,117	3,284	10,517
2014	3,879	970	1,172	1,106	3,015	10,142
2015	3,756	989	1,159	1,053	2,770	9,727

Texas Workforce Commission Labor Market & Career Information Unemployment LAUS Report; U.S. National Bureau of Economic Research

Unemployment Rate (2005-2015)



Salaries and wages in the WTEDD region are behind the nation in most occupational categories. Average wages in West Texas and Southern New Mexico are at similar levels. However, compared to the U.S. average in 2015, average wages in the urban WTEDD counties are \$2.33 lower. This wage disparity has increased by 62% since 2009.

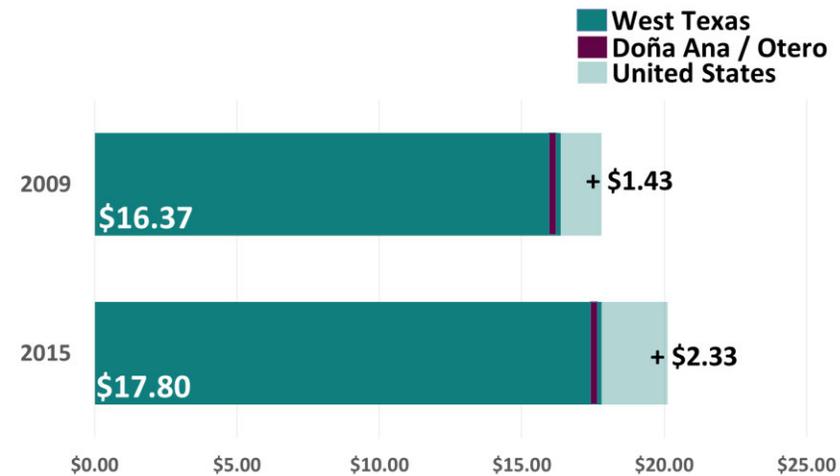
For almost all standard occupations (see page 26), the 2015 average and median hourly wages are below the national averages. Truck Drivers, which in 2009 had a median hourly wage in the West Texas region that was \$1.84 higher than national figures, have also seen wages stagnate or decrease.

Average and median hourly wage levels for low-wage, low-skilled occupations in categories such as retail, cashiers, and food service are at levels similar to other regions in the United States.

Median and average wages for top paying occupations in West Texas are mixed and have seen increases since 2009. Occupations in upper management, real estate, and medical service categories are higher than the national figures (see page 27). Occupations in information technology, finance, lower management, law, and human resources are at times considerably lower than national figures.

Over the last 35 years (with the exception of the late 1990s), hourly wages have lagged behind economy-wide productivity ([Economic Policy Institute 2015](#)). This trend has been the primary explanation for the rise of income stagnation and income inequality over the past generation. Both lower and middle class families have been affected by stagnant wages. However, wages in most STEM (science, technology, engineering, and math) occupations have growth significantly over the past decade

Changes in Average Hourly Wage (2009-2015)



BLS May 2015 National Occupational Employment and Wage Estimates – United States; Texas Workforce Commission Labor Market & Career Information – Tracer Data Link

Top Occupations by Number of Jobs: Wage Data in Comparison to the Rest of the United States (2015)

Number of Jobs in West Texas	Standard Occupational Classification	2015 Average Hourly Wage	2015 Entry-Level Hourly Wage	2015 Median Hourly Wage	2015 US Average Hourly Wage	2015 US Median Hourly Wage	2015 West Texas Average Hourly Wage Compared to U.S.	2015 West Texas Median Hourly Wage Compared to U.S.
299,110	Total, All Occupations	\$17.80	\$8.34	\$12.73	\$23.23	\$17.40	(\$5.43)	(\$4.67)
12,990	Retail Salespersons	\$11.17	\$8.20	\$9.06	\$11.77	\$9.84	(\$0.60)	(\$0.78)
11,350	Office Clerks, General	\$13.10	\$8.52	\$11.49	\$15.33	\$14.22	(\$2.23)	(\$2.73)
9,360	Cashiers	\$9.01	\$8.20	\$8.72	\$10.10	\$9.29	(\$1.09)	(\$0.57)
9,290	Combined Food Preparation and Serving Workers, Inc	\$8.63	\$8.16	\$8.61	\$9.47	\$9.09	(\$0.84)	(\$0.48)
8,740	Personal and Home Health Aides	\$8.34	\$8.19	\$8.52	\$11.00	\$10.54	(\$2.66)	(\$2.02)
7,810	Customer Service Representatives	\$13.04	\$9.66	\$11.81	\$16.62	\$15.25	(\$3.58)	(\$3.44)
5,700	Waiters and Waitresses	\$8.94	\$8.17	\$8.73	\$11.07	\$9.25	(\$2.13)	(\$0.52)
5,580	Registered Nurses	\$31.88	\$25.42	\$30.97	\$34.14	\$32.45	(\$2.26)	(\$1.48)
5,580	Janitors and Cleaners, Except Maids and Housekeeping	\$10.13	\$8.15	\$9.59	\$12.59	\$11.27	(\$2.46)	(\$1.68)
5,250	Truck Drivers, Heavy and Tractor-Trailer	\$17.95	\$11.03	\$17.18	\$20.43	\$19.36	(\$2.48)	(\$2.18)
4,990	Secretaries, Except Legal, Medical, and Executive	\$13.52	\$8.84	\$12.85	\$16.92	\$16.31	(\$3.40)	(\$3.46)
4,980	Stock Clerks and Order Fillers	\$10.50	\$8.21	\$9.29	\$12.47	\$11.17	(\$1.97)	(\$1.88)
4,350	Laborers & Freight, Stock & Material Movers	\$10.21	\$8.22	\$9.40	\$13.39	\$12.02	(\$3.18)	(\$2.62)
3,650	General and Operations Managers	\$51.21	\$22.75	\$38.93	\$57.44	\$46.99	(\$6.23)	(\$8.06)
3,470	First-Line Supervis./Managers of Retail Sales Work	\$20.82	\$10.91	\$17.29	\$20.63	\$18.42	\$0.19	(\$1.13)
3,080	Security Guards	\$11.35	\$8.19	\$9.90	\$13.68	\$11.84	(\$2.33)	(\$1.94)
3,070	Bookkeeping, Accounting, and Auditing Clerks	\$15.38	\$10.07	\$14.70	\$18.74	\$17.91	(\$3.36)	(\$3.21)
2,880	Cooks, Restaurant	\$9.54	\$8.19	\$9.10	\$11.74	\$11.11	(\$2.20)	(\$2.01)
2,880	Maintenance and Repair Workers, General	\$14.17	\$9.26	\$13.43	\$18.73	\$17.61	(\$4.56)	(\$4.18)
2,820	First-Line Supervisors of Office and Administrative Support	\$24.81	\$15.00	\$22.68	\$27.01	\$25.30	(\$2.20)	(\$2.62)
2,530	Arts, Design, Entertainment, Sports, and Media Occupations	\$20.27	\$8.82	\$16.80	\$27.39	\$22.19	(\$7.12)	(\$5.39)
2,190	Nursing Assistants	\$10.43	\$8.19	\$9.41	\$12.89	\$12.36	(\$2.46)	(\$2.95)

BLS May 2015 National Occupational Employment and Wage Estimates – United States; Texas Workforce Commission Labor Market & Career Information – Tracer Data Link

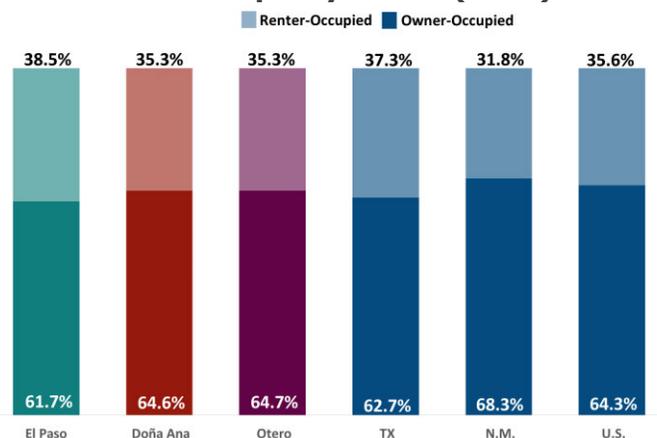
Top Paying Occupations in West Texas Compared to the Rest of the United States (2015)

Standard Occupational Code/Title	2015 Average Hourly Wage	2015 Entry Hourly Wage	2015 Median Hourly Wage	2015 US Average Hourly Wage	2015 US Median Hourly Wage	2015 West Texas Average Hourly Wage Compared to U.S.	2015 West Texas Median Hourly Wage Compared to U.S.
Chief Executives	\$106.31	\$64.83	\$97.78	\$89.35	\$84.19	\$16.96	\$13.59
Dentists, General	\$88.13	\$55.21	\$73.98	\$82.86	\$73.42	\$5.27	\$0.56
Advertising and Promotions Managers	\$75.27	\$31.91	\$83.61	\$54.62	\$46.10	\$20.65	\$37.51
Purchasing Managers	\$66.78	\$33.11	\$56.82	\$54.87	\$51.98	\$11.91	\$4.84
Industrial Production Managers	\$65.45	\$29.56	\$53.46	\$49.87	\$45.17	\$15.58	\$8.29
Lawyers	\$64.36	\$34.33	\$49.88	\$65.51	\$55.69	(\$1.15)	(\$5.81)
Marketing Managers	\$63.79	\$37.56	\$60.86	\$67.63	\$61.90	(\$3.84)	(\$1.04)
Mechanical Engineers	\$59.53	\$27.70	\$45.13	\$42.40	\$40.19	\$17.13	\$4.94
Sales Managers	\$58.50	\$28.30	\$49.40	\$62.69	\$54.74	(\$4.19)	(\$5.34)
Pharmacists	\$58.48	\$53.53	\$58.44	\$57.34	\$58.41	\$1.14	\$0.03
Engineering Managers	\$57.77	\$36.14	\$56.91	\$68.10	\$63.85	(\$10.33)	(\$6.94)
Real Estate Brokers	\$56.48	\$41.97	\$45.50	\$38.56	\$27.34	\$17.92	\$18.16
Public Relations Managers	\$56.42	\$33.14	\$53.65	\$57.40	\$50.07	(\$0.98)	\$3.58
Physician Assistants	\$55.97	\$39.69	\$55.05	\$47.73	\$47.20	\$8.24	\$7.85
Nurse Practitioners	\$55.73	\$41.16	\$53.22	\$48.68	\$47.21	\$7.05	\$6.01
Computer and Information Systems Managers	\$55.64	\$35.96	\$55.33	\$67.79	\$63.27	(\$12.15)	(\$7.94)
First-Line Super./Man. of Police & Detectives	\$55.51	\$34.72	\$63.22	\$41.26	\$39.47	\$14.25	\$23.75
Natural Sciences Managers	\$52.52	\$43.78	\$48.15	\$65.66	\$57.77	(\$13.14)	(\$9.62)
Financial Managers	\$51.56	\$31.20	\$45.10	\$64.58	\$56.73	(\$13.02)	(\$11.63)
Education Administrators, Postsecondary	\$51.32	\$27.26	\$44.62	\$49.33	\$42.59	\$1.99	\$2.03
General and Operations Managers	\$51.21	\$22.75	\$38.93	\$57.44	\$46.99	(\$6.23)	(\$8.06)
Veterinarians	\$50.71	\$29.18	\$42.82	\$47.59	\$42.54	\$3.12	\$0.28
Computer Network Architects	\$49.86	\$29.11	\$50.49	\$49.57	\$48.19	\$0.29	\$2.30
Physical Therapists	\$49.33	\$33.93	\$45.46	\$41.25	\$40.40	\$8.08	\$5.06
Occupational Therapists	\$47.51	\$32.35	\$45.17	\$39.27	\$38.54	\$8.24	\$6.63
Administrative Law Judges, Adjudicators, and Hearing Officers	\$47.28	\$39.18	\$41.44	\$44.78	\$43.56	\$2.50	(\$2.12)
Managers, All Other	\$47.25	\$41.08	\$44.15	\$53.47	\$50.41	(\$6.22)	(\$6.26)
Human Resources Managers	\$46.34	\$29.78	\$43.02	\$56.29	\$50.21	(\$9.95)	(\$7.19)
Healthcare Practitioners & Tech. Workers, Other	\$46.26	\$28.39	\$53.49	\$37.40	\$30.10	\$8.86	\$23.39
Engineers, All Other	\$46.16	\$26.88	\$43.88	\$47.19	\$46.11	(\$1.03)	(\$2.23)

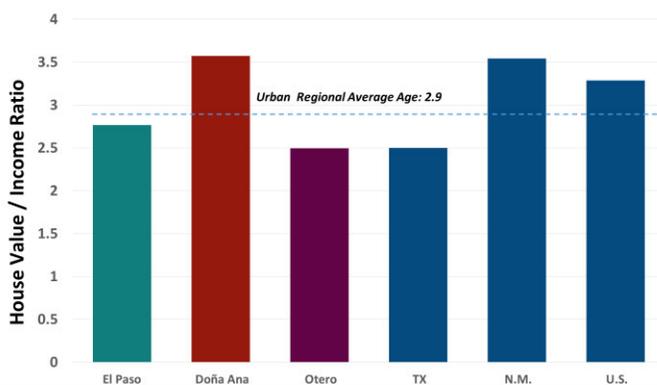
BLS May 2015 National Occupational Employment and Wage Estimates – United States; Texas Workforce Commission Labor Market & Career Information – Tracer Data Link

State of the Region: Housing and Transportation

Household Occupancy Status (2014)



House Value / Income Ratio across Urban WTEDD Counties (2014)



U.S. Census Bureau 2014 American Community Survey

Households with Housing Costs Over 30% (2014)

	El Paso	Doña Ana	Otero	Texas	New Mexico	United States
Owner Occupied Under 35k Costs Over 30%	16.9%	16.4%	16.1%	12.8%	15.2%	13.3%
Owner Occupied Over 35k Costs Over 30%	7.5%	4.4%	6.0%	10.2%	9.0%	14.1%
Renter Occupied Under 35k Costs Over 30%	40.1%	46.7%	32.2%	37.9%	40.4%	38.4%
Renter Occupied Over 35k Costs Over 30%	6.3%	4.4%	5.3%	7.3%	5.1%	9.9%
Households without "Affordable Rate"	70.8%	71.9%	59.6%	68.2%	69.7%	75.7%
Households with "Affordable Rate"	29.2%	28.1%	40.4%	31.8%	30.3%	24.3%
Average Monthly Owner-Occupied Housing Costs	\$800.00	\$709.00	\$593.00	\$1,028.00	\$801.00	\$1,108.00
Average Monthly Renter-Occupied Housing Costs	\$741.00	\$705.00	\$775.00	\$870.00	\$774.00	\$920.00
Median Monthly Household Income	\$3,398.58	\$3,202.17	\$3,384.50	\$4,381.33	\$3,747.33	\$4,456.83

A cost-of-living index is used to measure relative cost of living over time or regions using factors such as groceries, housing, utilities, transportation, healthcare, and other miscellaneous goods and services.

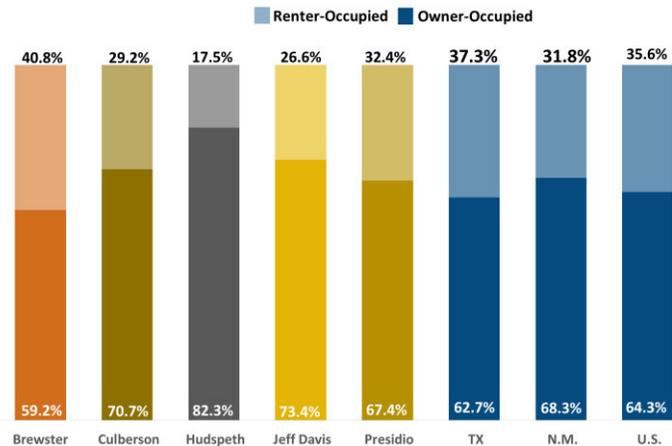
El Paso and Doña Ana counties are considered affordable within the national composite index. However, lower wages in the region offset these perceived cost advantages. Additionally, housing costs have risen above wages across the country.

Housing affordability has traditionally been set at 30% of household income. Households with housing costs above 30% are said to be "burdened." 70.8% of households in El Paso County exceed the 30% affordability threshold. Similarly, 71.9% of households in Doña Ana County exceed the 30% affordability threshold. These figures are consistent with state percentages, but are lower than the national percentage. In Otero County, only 59.6% of households exceed the 30% affordability threshold, which is well below regional, state, and national figures.

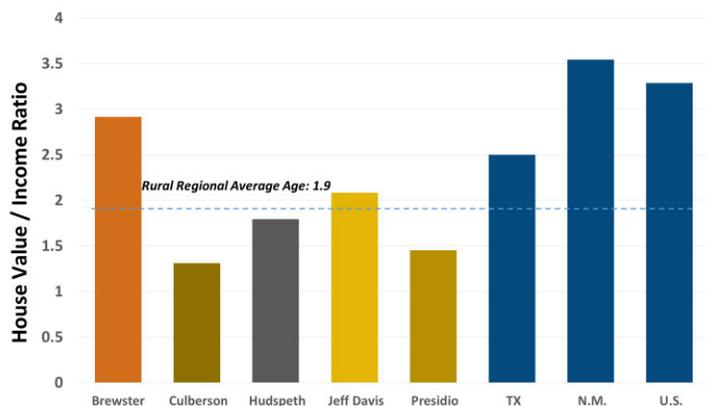
Renter/owner occupancy status stands close to a 40/60% ratio across the urban WTEDD region and in state averages. Across the United States, this ratio changes to 35/65%.

The house value / income ratio is used to determine the affordability of buying a home in a given region. Historically, the U.S. has maintained a 2.2 ratio. In urban WTEDD counties, average home prices have risen considerably, making it less affordable to purchase a home than in the past.

Household Occupancy Status (2014)



House Value / Income Ratio across Rural WTEDD Counties (2014)



U.S. Census Bureau 2014 American Community Survey

Households with Housing Costs Over 30% (2014)

	Brewster	Culberson	Hudspeth	Jeff Davis	Presidio	Texas	New Mexico	United States
Owner Occupied Under 35k Costs Over 30%	9.3%	20.7%	24.3%	17.0%	10.8%	12.8%	15.2%	13.3%
Owner Occupied Over 35k Costs Over 30%	7.3%	0.0%	0.0%	0.6%	3.2%	10.2%	9.0%	14.1%
Renter Occupied Under 35k Costs Over 30%	27.4%	38.2%	26.8%	3.5%	20.6%	37.9%	40.4%	38.4%
Renter Occupied Over 35k Costs Over 30%	5.1%	0.0%	3.4%	3.2%	0.0%	7.3%	5.1%	9.9%
Households without "Affordable Rate"	49.1%	58.9%	54.5%	24.3%	34.6%	68.2%	69.7%	75.7%
Households with "Affordable Rate"	50.9%	41.1%	45.5%	75.7%	65.4%	31.8%	30.3%	24.3%
Average Monthly Owner-Occupied Housing Costs	\$488.00	\$381.00	\$354.00	\$371.00	\$346.00	\$1,028.00	\$801.00	\$1,108.00
Average Monthly Renter-Occupied Housing Costs	\$629.00	\$480.00	\$660.00	\$929.00	\$400.00	\$870.00	\$774.00	\$920.00
Median Monthly Household Income	\$3,215.75	\$2,941.83	\$1,945.83	\$4,279.75	\$2,581.92	\$4,381.33	\$3,747.33	\$4,456.83

Although composite index scores are not currently reported for rural WTEDD counties, the similar relative cost / wage analysis can be made to determine cost of living after considering housing. It is important to note that cost of goods are consistently higher in rural counties.

Despite having lower income levels, it is generally more affordable to own a home in rural WTEDD counties than it is in the urban counties, where the renter/owner ratio benefits homeownership over renting. Excluding Brewster County, house value / income ratios are closer to or below urban, state, and national figures. This is consistent with many rural counties across the State of Texas. The higher average age of the population living in these counties as well as outward migration are likely factors influencing this trend.

There are also substantially less households under the housing affordability threshold in the rural WTEDD counties compared to urban, state, and national percentages.

Consistent with seasonal tourist destination across the United States, house values in Brewster County are well above rural averages. Homeowners in Marfa, TX and Alpine, TX offer short-term rental options through services like Airbnb. However, traditional demographics currently do not capture vacant and short-term-rental housing.

Population Working at Home in WTEDD Urban Counties

	El Paso	Doña Ana	Otero	TX	N.M.	U.S.
Worked at home (M)	2.8%	3.8%	2.0%	3.9%	4.4%	4.2%
Worked at home (F)	3.3%	4.7%	3.2%	4.3%	5.3%	4.5%

Population Working Inside/Outside County of Residence in WTEDD Urban Counties

	El Paso	Doña Ana	Otero	TX	N.M.	U.S.
Worked In County (M)	92.2%	79.3%	86.1%	75.0%	82.7%	69.9%
Worked Outside County (M)	1.7%	3.3%	6.2%	23.5%	13.2%	25.6%
Worked Outside of State (M)	6.2%	17.4%	7.7%	1.5%	4.0%	4.5%
Worked In County (F)	97.0%	84.6%	91.5%	80.4%	87.0%	75.3%
Worked Outside County (F)	0.3%	1.3%	2.7%	19.1%	10.6%	21.7%
Worked Outside of State (F)	3.0%	14.2%	5.8%	50.0%	2.3%	3.0%

Mean Travel Time to Work in WTEDD Urban Counties

	El Paso	Doña Ana	Otero	TX	N.M.	U.S.
Mean Travel Time (M)	24.2	22.1	22.2	26.9	23.2	27.2
Mean Travel Time (F)	21.8	18.5	17.7	23.1	20.0	24.0
Mean Travel Time	23	20.3	19.95	25	21.6	25.6
Carpooled (M)	10.6%	10.5%	17.6%	11.2%	11.1%	9.8%
Carpooled (F)	12.1%	8.9%	16.0%	10.9%	9.8%	9.3%

*U.S. Census
Bureau 2014
American
Community
Survey*

A significant percentage of workers in El Paso, Doña Ana, and Otero counties are employed outside of their home state. Residential growth and commercial development along the Interstate 10 Highway between the City of El Paso and the City of Las Cruces has allowed residents to benefit from employment opportunities in both areas.

A smaller percentage of workers work from home compared to state and national averages.

In the City of El Paso, recent congestion in the Interstate 10 Highway and U.S. Route 54 is a result of urban sprawling and unprecedented growth. Recent, ongoing, and planned infrastructure investments have been made to address the issue. Despite these challenges, residents of the urban WTEDD counties get to and from work faster than the state and national average.

Unfortunately, transitional workers and drivers crossing from Ciudad Juárez regularly are not captured as part of these datasets.

Population Working at Home in WTEDD Rural Counties

	Brewster	Culberson	Hudspeth	Jeff Davis	Presidio	TX	N.M.	U.S.
Worked at home (M)	4.7%	1.3%	6.9%	21.1%	9.1%	3.9%	4.4%	4.2%
Worked at home (F)	6.5%	2.2%	6.5%	4.8%	8.2%	4.3%	5.3%	4.5%

*U.S. Census Bureau
2014 American
Community Survey*

Population Working Inside/Outside County of Residence in WTEDD Rural Counties

	Brewster	Culberson	Hudspeth	Jeff Davis	Presidio	TX	N.M.	U.S.
Worked In County (M)	88.7%	63.0%	67.8%	76.6%	76.0%	75.0%	82.7%	69.9%
Worked Outside County (M)	11.2%	34.4%	32.2%	23.4%	17.6%	23.5%	13.2%	25.6%
Worked Outside of State (M)	0.1%	1.5%	0.0%	0.0%	6.4%	1.5%	4.0%	4.5%
Worked In County (F)	93.2%	93.7%	76.6%	71.0%	92.5%	80.4%	87.0%	75.3%
Worked Outside County (F)	6.8%	6.3%	23.4%	29.0%	6.8%	19.1%	10.6%	21.7%
Worked Outside of State (F)	0.0%	0.0%	0.0%	0.0%	0.7%	50.0%	2.3%	3.0%

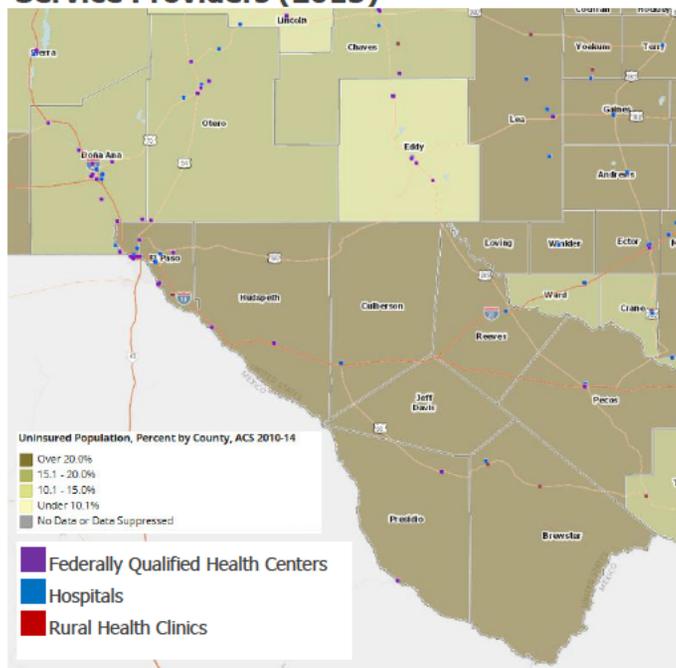
Mean Travel Time to Work in WTEDD Rural Counties

	Brewster	Culberson	Hudspeth	Jeff Davis	Presidio	TX	N.M.	U.S.
Mean Travel Time (M)	12.9	16.5	25.7	19.8	17.7	26.9	23.2	27.2
Mean Travel Time (F)	10.0	5.0	20.4	18.9	11.1	23.1	20.0	24.0
Mean Travel Time	11.45	10.75	23.05	19.35	14.4	25	21.6	25.6
Carpooled (M)	13.4%	23.3%	18.2%	12.9%	14.5%	11.2%	11.1%	9.8%
Carpooled (F)	15.4%	5.7%	13.9%	21.5%	11.9%	10.9%	9.8%	9.3%

A large number of workers living in the rural WTEDD counties live in one county and work at another. This is especially true in Jeff Davis, Presidio, and Brewster Counties, where the economic and social interconnectedness is commonly referred to as the “Marfa-Jeff Davis-Alpine” triangle.

Agricultural work accounts for the higher population working at home in Jeff Davis County. In Presidio County, higher unemployment is a factor. Also, as many as 7.1% of residents in Presidio County work outside of the state, which can be interpreted as working across the U.S.-Mexico border in Manuel Ojinaga, Mexico.

State of the Region: Health Percentage of Uninsured Population by County (2014) and Regional Health Service Providers (2015)



U.S. Census Bureau 2014 American Community Survey;
U.S. Department of Health & Human Services, Center for Medicare
& Medicaid Services, Provider of Services, Sept. 2015; Community
Commons 2016

There is a [positive correlation](#) between regional income levels and public health outcomes. Research from the International Monetary Fund (IMF) suggests that [investing in health](#) is critical for achieving economic development goals. Access to health services is a [crucial component](#) to building regional wealth and economic security.

People of Hispanic/Latino background are more likely than the general population to develop diabetes and therefore have a higher risk for secondary health conditions, including heart disease and stroke. Risk factors include [obesity, smoking, and physical inactivity](#). These same risk factors are prevalent across the WTEDD region.

Access to health services in the WTEDD region is limited due to a high percentage of the population being uninsured. In the rural WTEDD counties, access to health services is also limited due to large distances to and between health centers. There is a need for preventative health programs across the rural WTEDD counties, including mobile clinical health services, tobacco cessation programs, investments in physical activity facilities and programs, and mental health services.

Health Behaviors, Access to Clinical Care, and Physical Environment Health Factors in the Urban WTEDD Counties (2016)

Health Behaviors & Clinical Care	El Paso	Doña Ana	Otero	Texas	New Mexico	Top U.S. Performers
Adult Smoking	16%	17%	20%	15%	19%	14%
Adult Obesity	27%	23%	26%	28%	24%	25%
Physical Inactivity	24%	20%	23%	24%	20%	20%
Excessive Drinking	18%	17%	16%	17%	15%	12%
Uninsured	31%	25%	23%	25%	22%	11%
Primary Care Physicians	2,180:1	1,600:1	2,050:1	1,680:1	1,310:1	1,040:1
Physical Environment	El Paso	Doña Ana	Otero	Texas	New Mexico	Top U.S. Performers
Air Pollution - Particulate Matter	10.3	10.3	10.1	9.6	10	9.5
Severe Housing Problems	21%	18%	15%	18%	18%	9%
Long Commute - Driving Alone	30%	21%	21%	36%	25%	15%

Health Behaviors, Access to Clinical Care, and Physical Environment Health Factors in the Rural WTEDD Counties (2016)

Health Behaviors & Clinical Care	Brewster	Culberson	Hudspeth	Jeff Davis	Presidio	Texas	Top U.S. Performers
Adult Smoking	15%	18%	21%	13%	16%	15%	14%
Adult Obesity	28%	31%	29%	27%	28%	28%	25%
Physical Inactivity	24%	29%	26%	26%	30%	24%	20%
Excessive Drinking	16%	14%	13%	14%	13%	17%	12%
Uninsured	24%	32%	37%	33%	34%	25%	11%
Primary Care Physicians	1,330:1	n/a	n/a	2,250:1	2,400:1	1,680:1	1,040:1
Physical Environment	Brewster	Culberson	Hudspeth	Jeff Davis	Presidio	Texas	Top U.S. Performers
Air Pollution - Particulate Matter	11.7	10.8	10.5	11.1	10.7	9.6	9.5
Severe Housing Problems	11%	16%	25%	9%	14%	18%	9%
Long Commute - Driving Alone	11%	11%	40%	28%	15%	36%	15%

University of Wisconsin Population Health Institute, County Health Rankings: 2016

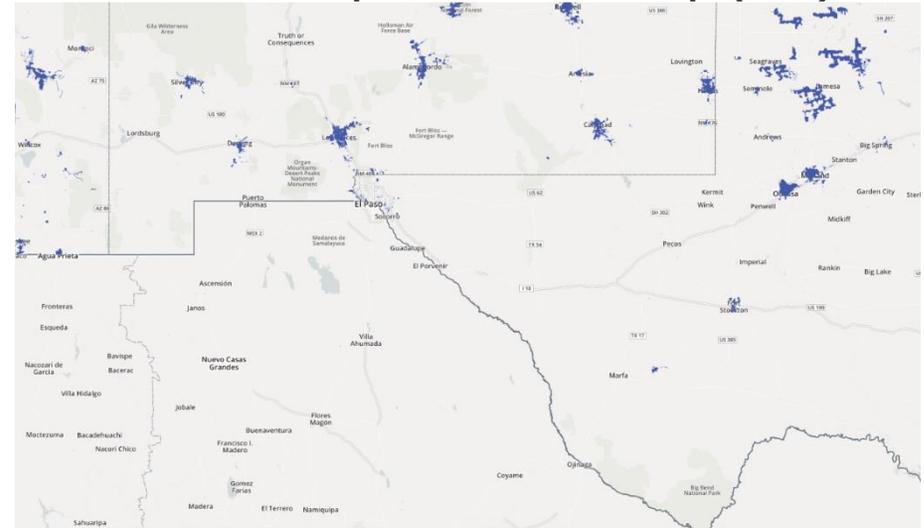
State of the Region: Infrastructure

There is a [positive relationship](#) between broadband expansion and economic growth, especially in areas with a lower population density. Broadband expansion has social and economic benefits, including improved health care delivery via [telemedicine](#) and the growth of [digital economies](#) and digital entrepreneurs.

In 2015, the Federal Communications Commission voted to boost the definition of broadband from 4Mbps downstream / 1Mbps upstream to 25Mbps/3Mbps. Internet service providers in the WTEDD region offer wireline broadband in most cities ranging from 10 Mbps up to 25 Mbps. However, internet download speeds above 25 Mbps is limited. The City of Las Cruces and the City of Alamogordo are two notable exceptions.

Service providers also offer wireless internet coverage with speeds ranging from 10 Mbps to 25 Mbps in all population centers and along interstate and state highways across the WTEDD region.

Maximum Advertised Speed Available 25+ Mbps (2014)



National Broadband Map

Interstate and State Highways in the WTEDD Region



National Atlas of the United States

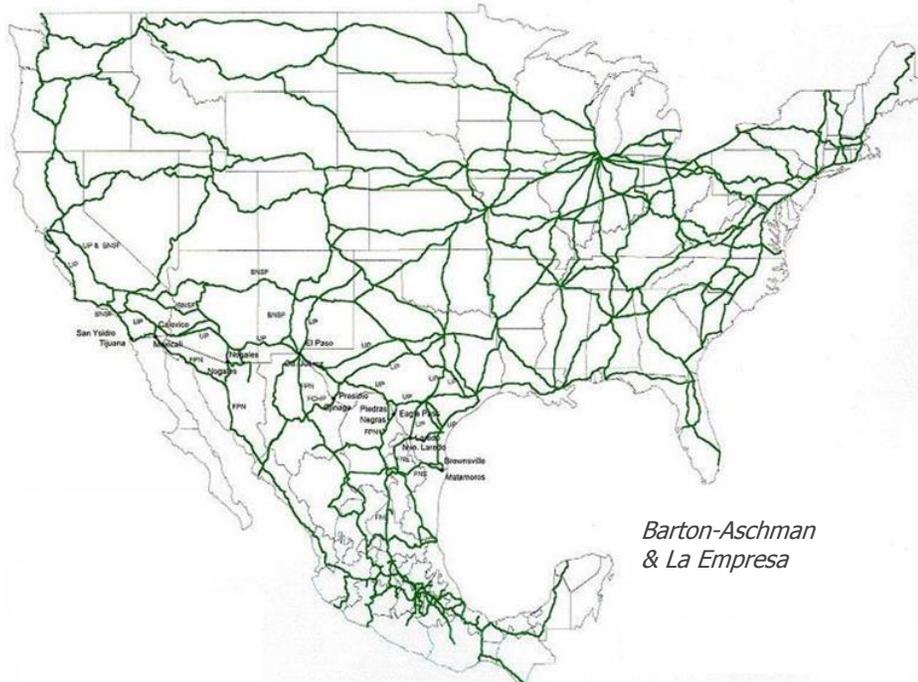
National Atlas of the United States of America

The WTEDD region contains two major interstate highways. Interstate 10, an east-west highway that begins in Jacksonville, Florida, and ends in Santa Monica, California. Interstate 25, a north-south highway that begins in Doña Ana County just before the City of Las Cruces and ends in Buffalo, Wyoming, passing through cities such as Albuquerque, New Mexico, and Denver, Colorado. Interstate 20 begins just north of Jeff Davis County and ends near the North Carolina-South Carolina border.

All of these interstate highways are major truck routes that provide American, Canadian, and Mexican trucks access to each other's markets.

Other highway systems cross through the area. U.S. Routes 54, 385, 90, 62/180, 70, and 67 all pass through the region, connecting the WTEDD to other parts of the county and providing access to Mexico. Major state highways include Highways 170, 118, 17, and 1111. However, trucking companies are less likely to use these routes for transportation routes unless they are transporting freight to and from communities located along these routes.

Railroad Serving Binational Trade between the United States and Mexico



*Barton-Aschman
& La Empresa*

Texas Pacific Route Map



*Texas Pacific
Transportation LTD.*

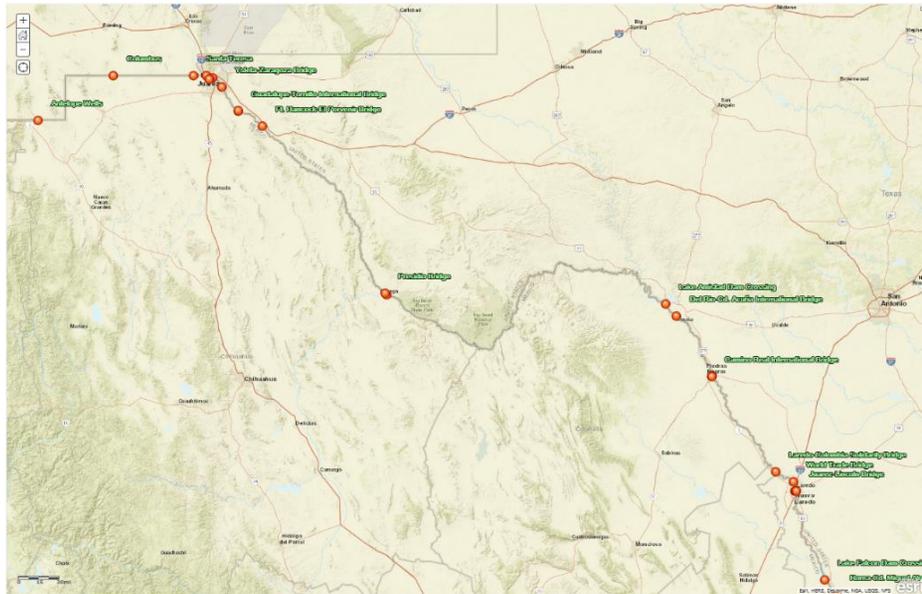
Railroads have been in use in the WTEDD since the 1800's. Burlington Northern Santa Fe Railway (BNSF), Union Pacific Railroad, and Southern Pacific Transportation Company operate the various tracks within the *WTEDD* region. Amtrak has a station in Alpine (Brewster County) and in El Paso.

In Ciudad Juárez and Manuel Ojinaga, Ferromex owns tracks that connect both cities to the Pacific port town of Topolobampo, Sinaloa, near the City of Los Mochis as well as to Mexico City, with both tracks intersecting at the City of Chihuahua.

One of the most heavily used railroad gateways between the U.S.-Mexico border is located in the El Paso-Ciudad Juárez area. However, there is heavy congestion caused by border wait times.

The South Orient Railroad is approximately 391 miles in length and connects the cities of Presidio and Ojinaga to the Heart of Texas. The South Orient Rail Line, as one of only seven rail gateways between the United States and Mexico, has the potential to relieve some of the congestion at other border crossings through the diversion of rail traffic to the Presidio/Ojinaga gateway. The line is currently maintained and operated by Texas Pacific Transportation, Ltd., which has announced several investments that would [rehabilitate the South Orient Line as early as 2018](#).

WTEDD Ports of Entry



There are eight ports of entry within the WTEDD region:

- Santa Teresa (Doña Ana County)
- Paso del Norte International Bridge (El Paso County)
- Stanton Street Bridge (El Paso County)
- Bridge of the Americas (El Paso County)
- Ysleta-Zaragoza Bridge (El Paso County)
- Fabens-Caseta International Bridge (El Paso County)
- Tornillo-Guadalupe (El Paso County)
- Presidio-Ojinaga International Bridge (Presidio County)

Ports of entry offer unparalleled economic opportunities for residents, workers, and employers throughout the U.S-Mexico border. With the Mexican economy on the rise, a growing middle class is looking to cities across the U.S-Mexico border for retail and tourism spending. Mexico may become the [world's fifth largest economy by 2050](#), a trend benefiting economic growth and development for the WTEDD. Mexican shoppers [spent \\$446 million in El Paso County](#) alone in 2012, approximately [10-12% of total retail sales](#).

Trade between the U.S. and Mexico continues to grow. Mexico is the second largest destination of U.S. goods and services, second only to Canada. [Six million U.S. jobs](#) are supported through bilateral trade with Mexico, and [more than 20%](#) of U.S. jobs are linked to trade across the border.

The [economy in border communities is still linked](#) to the *maquiladora* industry in Ciudad Juárez and the City of Chihuahua, Mexico. However, a decade after declines in manufacturing in the WTEDD region as a result of the enactment of the North American Free Trade Agreement (NAFTA), the economic interdependence of border communities is largely based on the retail, tourism, and transportation industries.

U.S. Trade with Mexico by Border City (2010)

City	Import and Value (billions)	Percent	Export and Value (billions)	Percent
Laredo, TX	\$102.60	44.30%	\$81.20	50.10%
El Paso, TX	\$41.90	18.10%	\$29.20	18.00%
San Diego, CA	\$32.60	14.10%	\$16.30	18.00%
Nogales, AZ	\$15.90	6.90%	\$8.80	5.40%
Hidalgo, TX	\$15.80	6.80%	\$8.70	5.40%
Eagle Pass, TX	\$11.20	4.80%	\$5.70	3.50%
Calexico East, CA	\$5.90	2.50%	\$4.70	2.90%
Brownsville, TX	\$5.90	2.50%	\$7.60	4.70%

Texas Center for Border Economics and Enterprise

Border Crossings in El Paso, TX Ports of Entry (2005-2015)

Year	Trucks	Trains	Personal Vehicles	Predestrians
2005	740,654	1,618	15,971,739	7,613,546
2006	744,951	2,449	15,602,602	7,500,141
2007	782,936	2,691	14,062,053	8,454,434
2008	758,856	2,473	13,716,434	8,029,106
2009	644,272	1,502	10,529,485	7,637,649
2010	710,363	1,046	9,967,959	6,930,357
2011	714,699	1,152	9,148,377	6,172,346
2012	724,964	1,392	9,461,721	6,090,841
2013	738,914	1,357	10,877,163	6,015,421
2014	759,125	1,434	11,595,319	6,572,313
2015	747,702	1,528	12,258,192	6,847,689

Commercial border crossings declined in the El Paso ports of entry during the 2008 recession, but have since recovered to pre-recession levels. A similar trend is found in the Presidio port of entry.

Border crossings have been in steady decline in the Fabens port of entry. As a small, light-duty port, the Fabens port of entry only handles pedestrian and automobile traffic.

Commercial, automobile, and pedestrian traffic have been in steady increase at the Santa Teresa port of entry. Recent [private investments](#) in Doña Ana County will continue to expand the commercial role of the Santa Teresa port of entry in coming years.

According to a 2013 report by the [Wilson Center](#) on train and truck transportation, the cost to the regional economy will be \$54 billion by the year 2035 if the border is not made more efficient.

In response, border efficiency measures have been proposed by the [El Paso Metropolitan Planning Organization](#) and [U.S Congressman Beto O'Rourke](#), which, along with the [recent expansion](#) of the Presidio-Ojinaga bridge, should decrease commercial border wait times.

Border Crossings in Fabens, TX Port of Entry (2005-2015)

Year	Trucks	Trains	Personal Vehicles	Predestrians
2005	0	0	625,409	16,076
2006	0	0	565,913	16,353
2007	0	0	610,632	21,472
2008	0	0	557,124	35,259
2009	0	0	487,330	60,770
2010	0	0	359,794	56,147
2011	0	0	301,463	58,747
2012	0	0	303,851	61,216
2013	0	0	294,152	68,733
2014	0	0	285,918	56,644
2015	0	0	270,156	33,225

Border Crossings in Presidio, TX Port of Entry (2005-2015)

Year	Trucks	Trains	Personal Vehicles	Predestrians
2005	5,763	12	720,335	28,765
2006	6,306	8	741,368	17,856
2007	7,158	1	701,550	22,080
2008	6,197	0	680,218	33,408
2009	7,040	0	716,434	73,691
2010	9,298	0	691,816	81,643
2011	8,654	0	597,545	85,544
2012	11,373	0	570,671	78,768
2013	9,546	0	603,238	65,803
2014	10,584	0	616,002	77,759
2015	8,827	0	664,282	83,624

Border Crossings in Santa Teresa, NM PoE (2005-2015)

Year	Trucks	Trains	Personal Vehicles	Predestrians
2005	34,076	0	257,354	15,027
2006	36,905	0	318,095	15,066
2007	40,267	0	440,857	23,824
2008	45,856	0	373,905	21,537
2009	57,410	0	470,625	56,281
2010	78,879	0	478,970	116,716
2011	71,362	0	408,614	120,813
2012	80,744	0	381,903	104,519
2013	80,944	0	427,334	144,759
2014	87,597	0	463,799	175,112
2015	102,315	0	527,411	160,560

State of the Region: Natural Resources

National Parks in the Region



State Parks in the Region



The WTEDD region contains six national parks and monuments within its borders, as well as several scenic and beautiful state parks. Regional economic development and tourism stakeholders should look into developing a regional tourism strategy further leveraging and protecting the cultural and natural assets of the region. In summary, the region includes the following state and national parks:

National Parks

- [Big Bend National Park](#)
- [Carlsbad Caverns National Park](#)
- [Chamizal National Memorial](#)
- [Fort Davis National Historic Site](#)
- [Guadalupe Mountains National Park](#)
- [Rio Grande Wild & Scenic River](#)
- [White Sands National Monument](#)

State Parks

- [Balmorhea State Park](#)
- [Barton Warnock Visitors Center](#)
- [Big Bend Ranch State Park](#)
- [Davis Mountains State Park](#)
- [Fort Leaton State Historic Site](#)
- [Oliver Lee Memorial State Park](#)
- [Wyler Aerial Tramway](#)

State Parks

- [Franklin Mountains State Park](#)
- [Hueco Tanks State Park and Historic Site](#)
- [Indian Lodge](#)
- [Leasburg Dam State Park](#)
- [Mesilla Valley Bosque State Park](#)

Principal Growth Sectors and Clusters

A cluster is a regional concentration of related industries in a particular location. Clusters make regions uniquely competitive for private investment, jobs, entrepreneurship, and infrastructure development. Companies, suppliers, service providers, government agencies, training and education agencies, and agencies specializing in information, research, and technical support are all considered in clusters. [Industry clusters are the building blocks of U.S. competitiveness.](#)

Regional economies are composed of traded clusters, which serve markets beyond the located region, and local clusters, which serve local markets. The majority of a region's employment comes from jobs in local clusters.

Analyzing changes in job creation over time under the lens of local and traded clusters is one way to analyze regional employment trends. [U.S. Cluster Mapping](#), an initiative by the [Harvard Business School](#) and the U.S. Economic Development Administration, provides datasets and visualization tools allowing regional economic development stakeholders and policy makers to learn about employment and private job creation trends at the county level, metropolitan statistical area, or even a custom region.

Government employment is not included as part of this cluster analysis. Across the WTEDD region, the percentage of people employed by government ranges from 15-23%. Government employment in Otero County is significantly higher at 37.1%. This is in part due to the significant military, border patrol, and homeland security presence in the region.

Economic development efforts should be primarily focused in creating jobs within the private sector. In the urban WTEDD counties, developing medical clusters spearheaded by the [Medical Center of the Americas Foundation](#) and technology and entrepreneurial growth led by the [NMSU Arrowhead Center](#) are among the region's recent cluster development success stories.

Government, Private, and Farm Employment in Urban WTEDD Counties (2014)

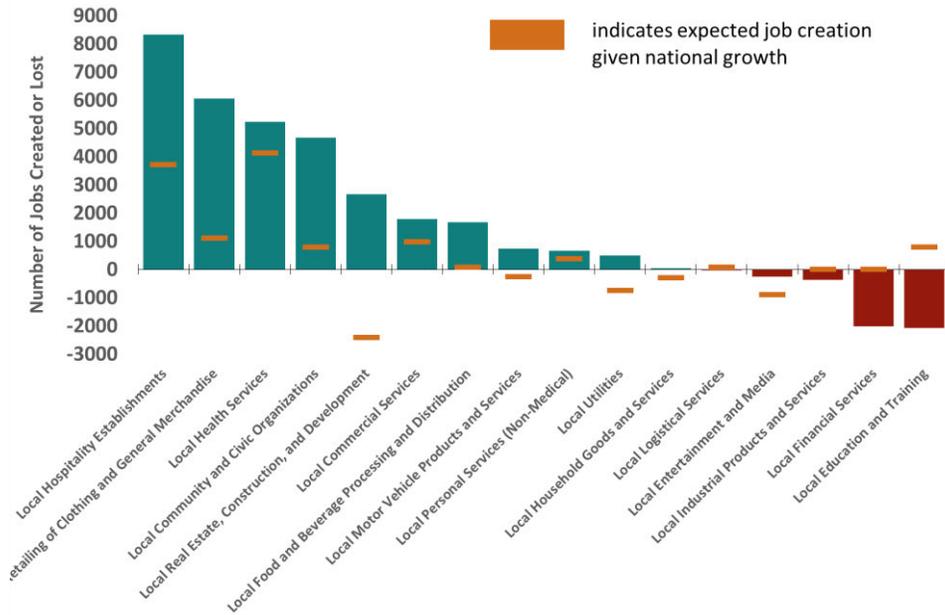
Full-Time and Part-Time Employment By NAICS	El Paso	El Paso	Doña Ana	Doña Ana	Otero	Otero
Government and Government Enterprises	94710	22.9%	21014	22.3%	10457	37.1%
Private Non-Farm Employment	318519	76.9%	70074	74.3%	17241	61.1%
Farm Employment	965	0.2%	3245	3.4%	523	1.9%
Total	414194	100.00%	94333	100.00%	28221	100.00%

Government, Private, and Farm Employment in Rural WTEDD Counties (2014)

Full-Time and Part-Time Employment By NAICS	Brewster	Brewster	Culberson	Culberson	Hudspeth	Hudspeth	Jeff Davis	Jeff Davis	Presidio	Presidio
Government and Government Enterprises	1358	22.7%	292	15.7%	650	30.1%	250	16.7%	992	30.0%
Private Non-Farm Employment	4386	73.2%	1426	76.8%	1253	58.0%	1115	74.4%	2087	63.1%
Farm Employment	244	4.1%	139	7.5%	257	11.9%	133	8.9%	231	7.0%
Total	5988	100.00%	1857	100.00%	2160	100.00%	1498	100.00%	3310	100.00%

U.S. Department of Commerce Bureau of Economic Analysis 2014

Private Job Creation by Local Cluster in El Paso County (2005-2014)



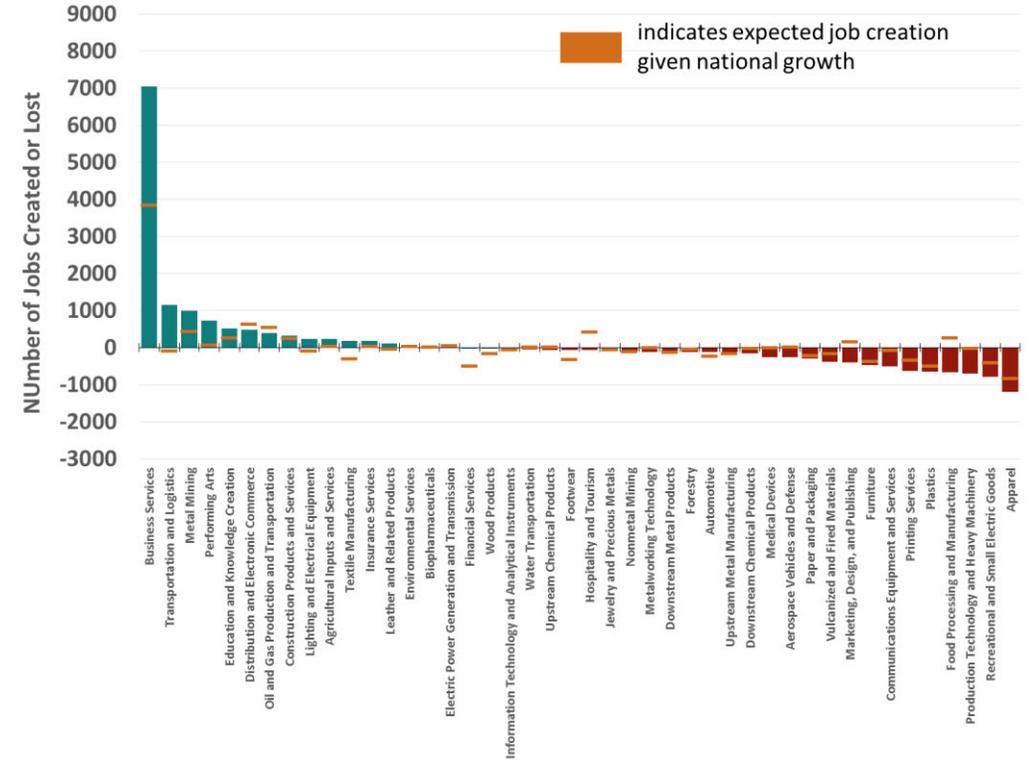
Business services, distribution and electronic commerce, transportation and logistics, and hospitality and tourism are the top industry clusters by employment in El Paso County.

75% of clusters in El Paso County are local clusters, while 25% are traded clusters. In comparison, the U.S. clusters are composed of 64% local clusters and 36% traded clusters.

Local cluster private job creation from 2005-2014 occurred across the hospitality, retail, health, nonprofit, and real estate clusters. However, local education and training programs and financial services saw losses during the same time period.

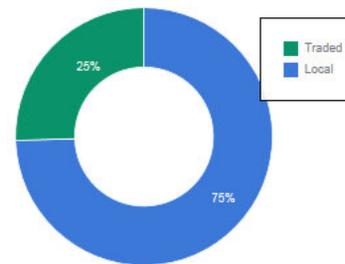
Traded cluster private job creation from 2005-2014 occurred primarily in the business services cluster. Transportation and logistics and metal mining also grew. Consistent with NAFTA trends across the United States, El Paso County saw losses in the apparel, manufacturing, and food processing clusters.

Private Job Creation by Traded Cluster in El Paso County (2005-2014)

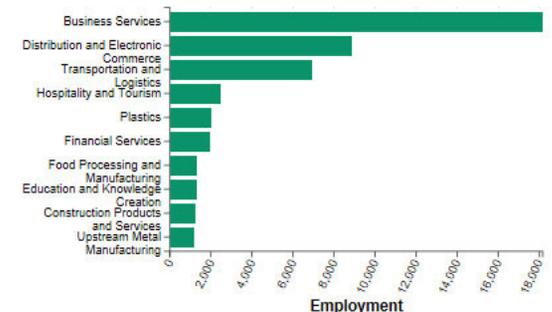


El Paso County Cluster Portfolio (2014)

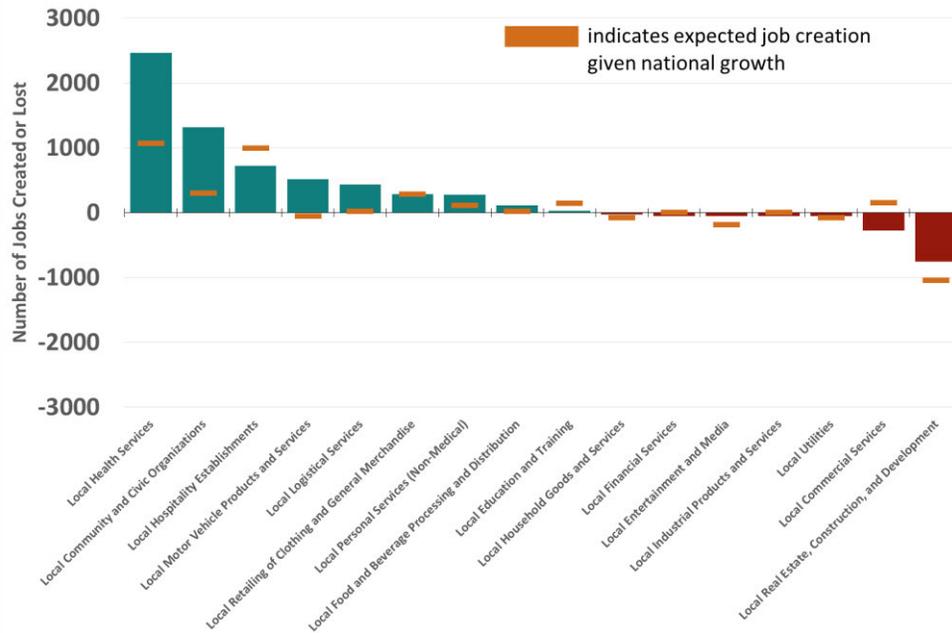
Traded vs. Local Clusters



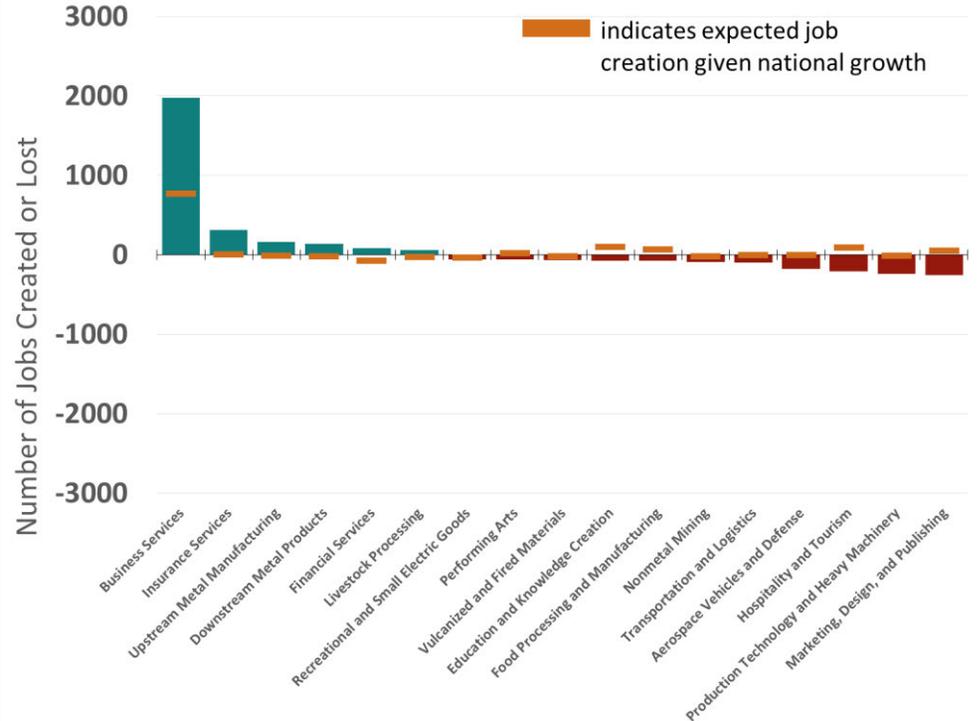
Top Clusters by Employment



Private Job Creation by Local Cluster in Doña Ana County (2005-2014)



Private Job Creation by Traded Cluster in Doña Ana County (2005-2014)



Business services, hospitality and tourism, distribution and electronic commerce, and food processing and manufacturing are the top industry clusters by employment in Doña Ana County.

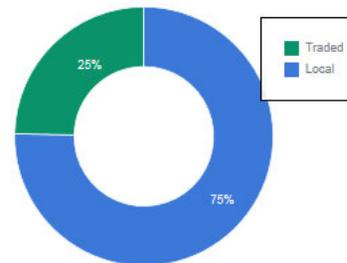
Similar to El Paso County, 75% of clusters in Doña Ana County are local clusters, while 25% are traded clusters.

Local cluster private job creation from 2005-2014 occurred primarily in health services, nonprofit organizations, and the hospitality industry.

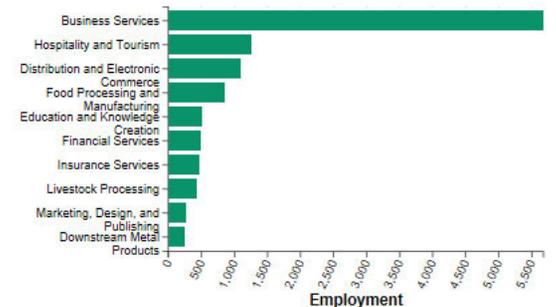
Traded cluster private job creation from 2005-2014 occurred primarily in business services, with some gains in insurance services.

Doña Ana County Cluster Portfolio (2014)

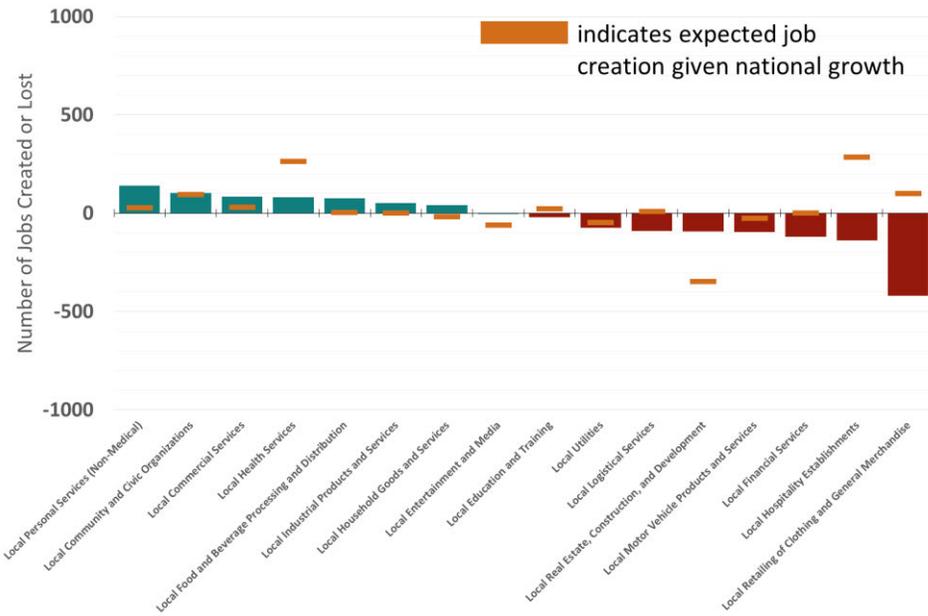
Traded vs. Local Clusters



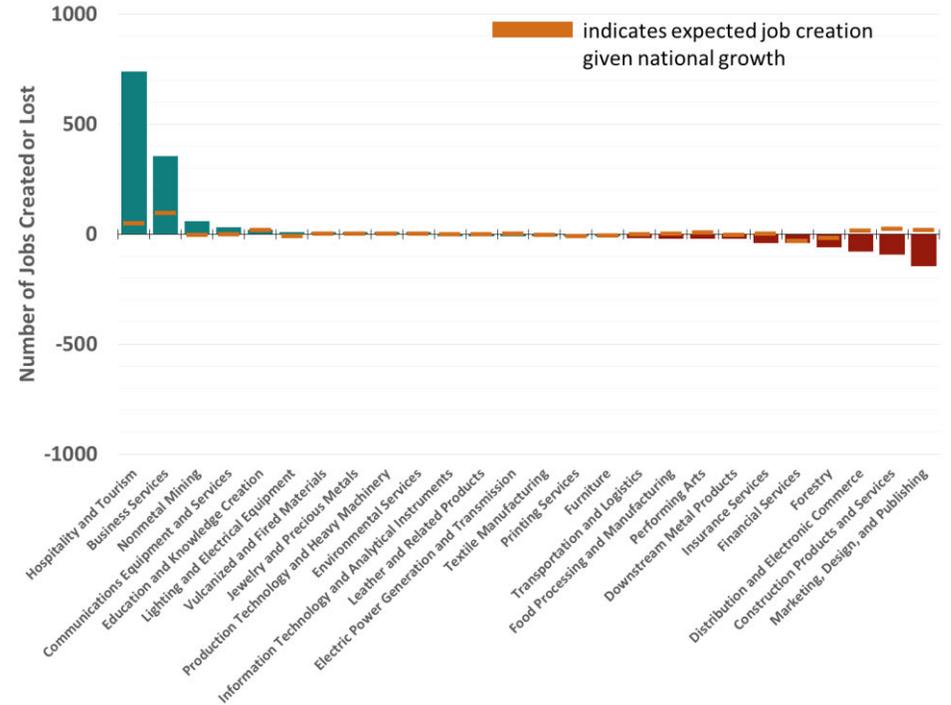
Top Clusters by Employment



Private Job Creation by Local Cluster in Otero County (2005-2014)



Private Job Creation by Traded Cluster in Otero County (2005-2014)



Hospitality and tourism and business services are the top industry clusters by employment in Otero County.

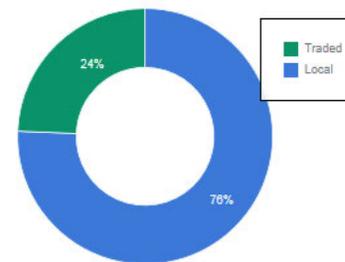
Similar to both El Paso and Doña Ana Counties, 76% of clusters in Otero County are local clusters, while 24% are traded clusters.

Local cluster private job creation from 2005-2014 grew by small amounts primarily in the local personal services, nonprofit, and commercial services clusters. Retail, hospitality, and financial services saw losses during the same time period.

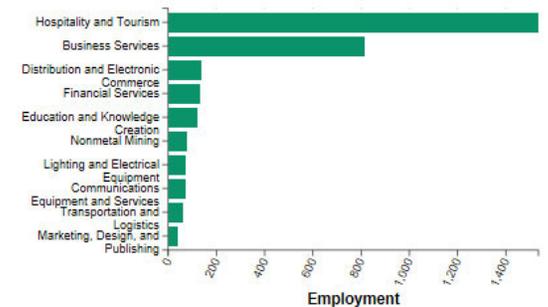
Traded cluster private job creation from 2005-2014 occurred primarily in hospitality and tourism and business services, while other industry clusters remained stagnant.

Otero County Cluster Portfolio (2014)

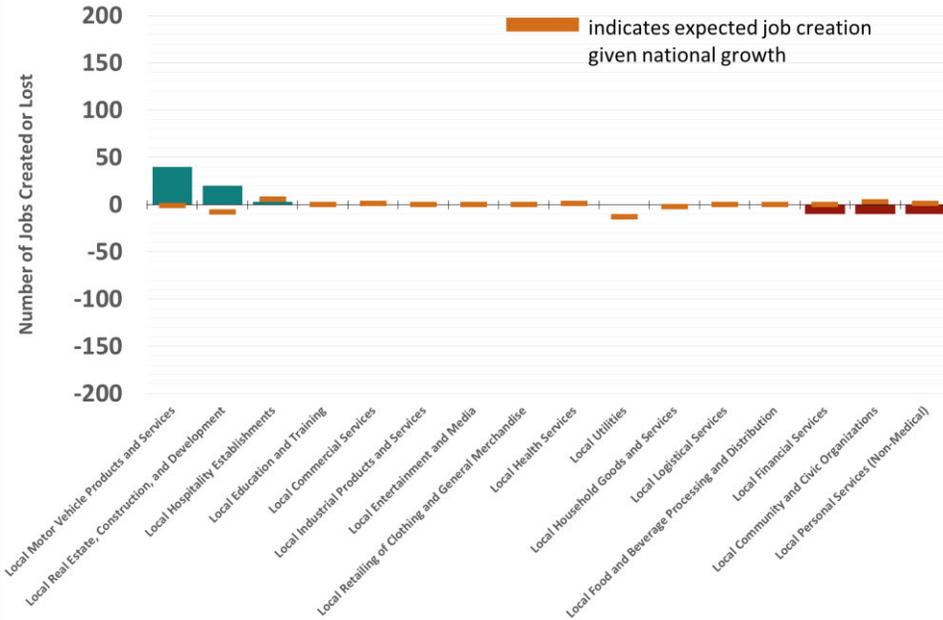
Traded vs. Local Clusters



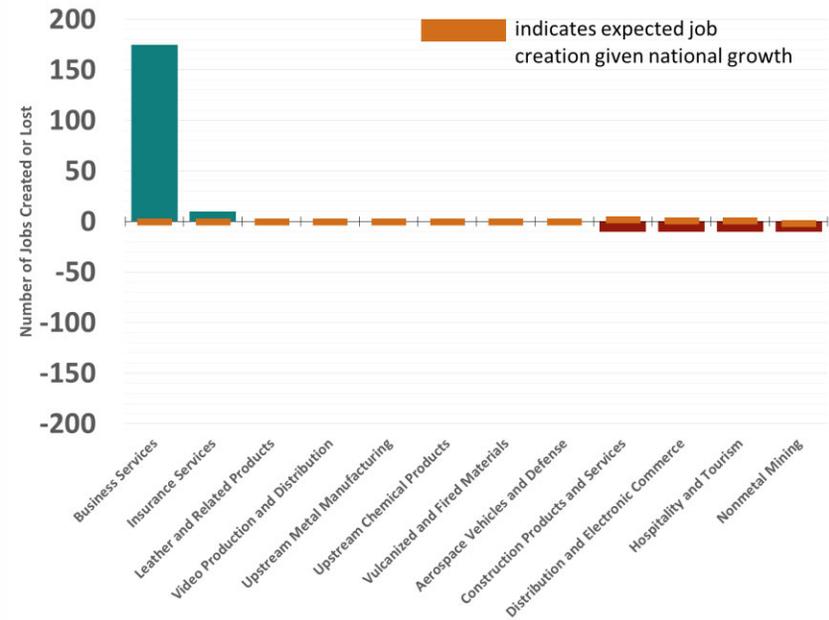
Top Clusters by Employment



Private Job Creation by Local Cluster in Hudspeth County (2005-2014)



Private Job Creation by Traded Cluster in Hudspeth County (2005-2014)



The top industry cluster by employment in Hudspeth County is business services.

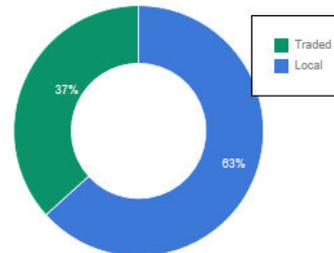
Due to the size and population of Hudspeth County, 63% of cluster industries are local clusters, while 37% are traded clusters.

Local cluster private job creation from 2005-2014 has remained stagnant, with some growth seen in local motor vehicle products and services (related to I-10), and local real estate, construction, and development.

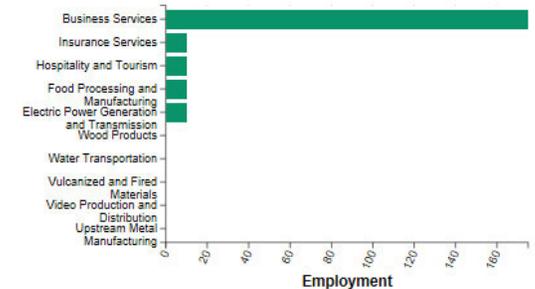
Traded cluster private job creation from 2005-2014 occurred primarily in business services.

Hudspeth County Cluster Portfolio (2014)

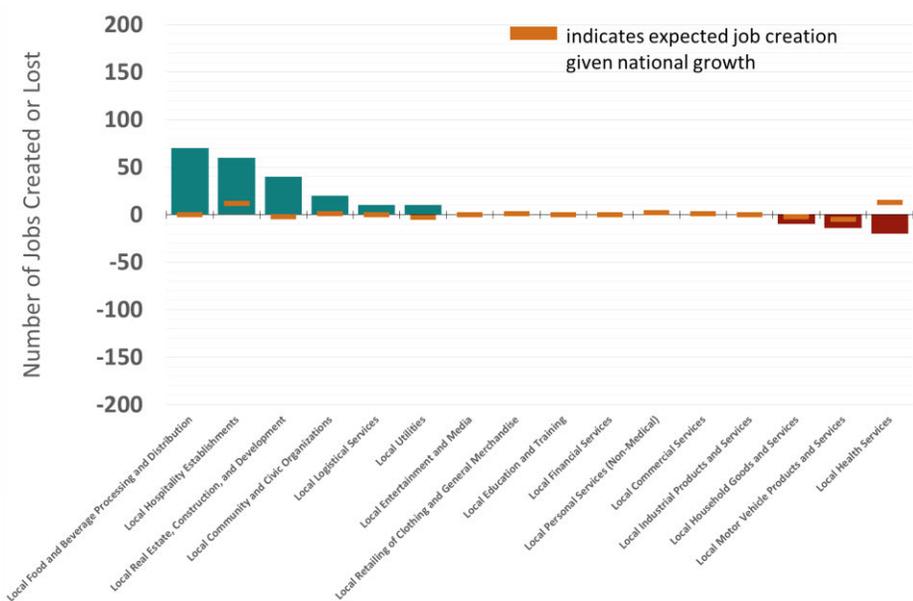
Traded vs. Local Clusters



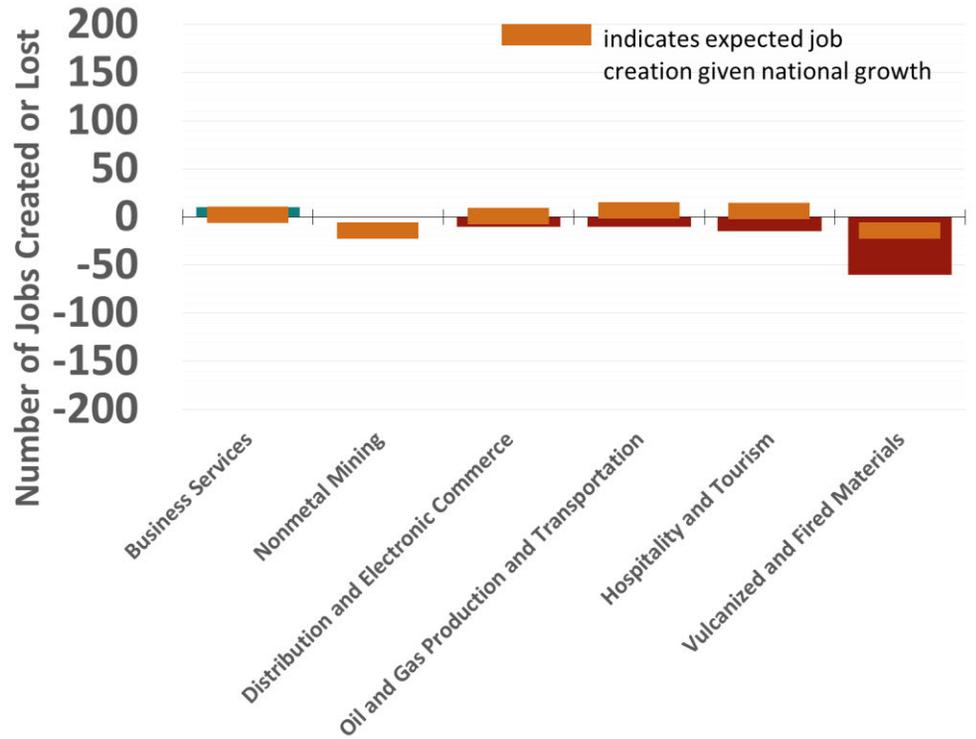
Top Clusters by Employment



Private Job Creation by Local Cluster in Culberson County (2005-2014)



Private Job Creation by Traded Cluster in Culberson County (2005-2014)



The top industry clusters by employment in Culberson County are hospitality and tourism, nonmetal mining, and business services.

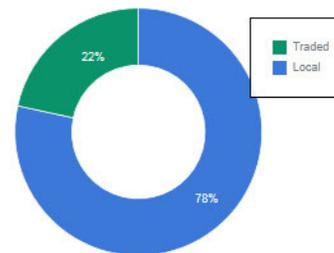
78% of cluster industries are local clusters, while 22% are traded clusters.

Local cluster private job creation from 2005-2014 is focused primarily on food and beverage processing and distribution, local hospitality establishments, and local real estate, construction, and development. This is consistent with the economic activity in the Town of Van Horn, which services I-10 commerce and travel.

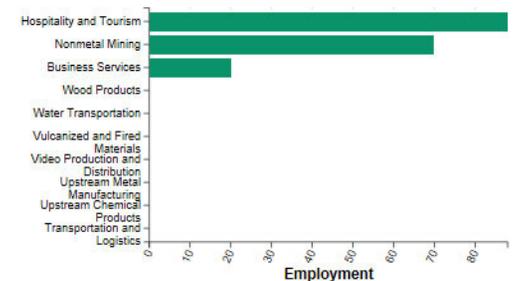
Traded cluster private job creation from 2005-2014 has remained stagnant and has seen a decline in the vulcanized and fired materials industry.

Culberson County Cluster Portfolio (2014)

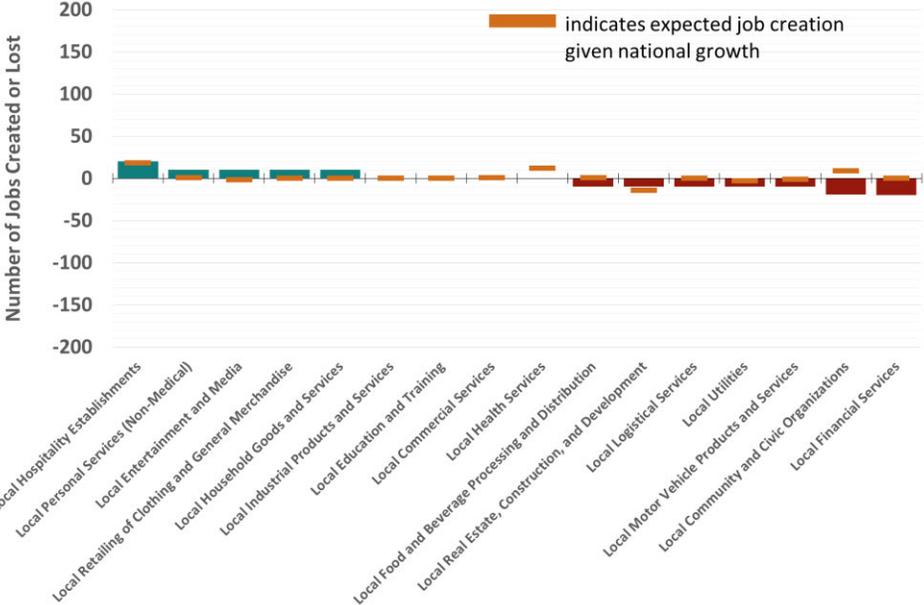
Traded vs. Local Clusters



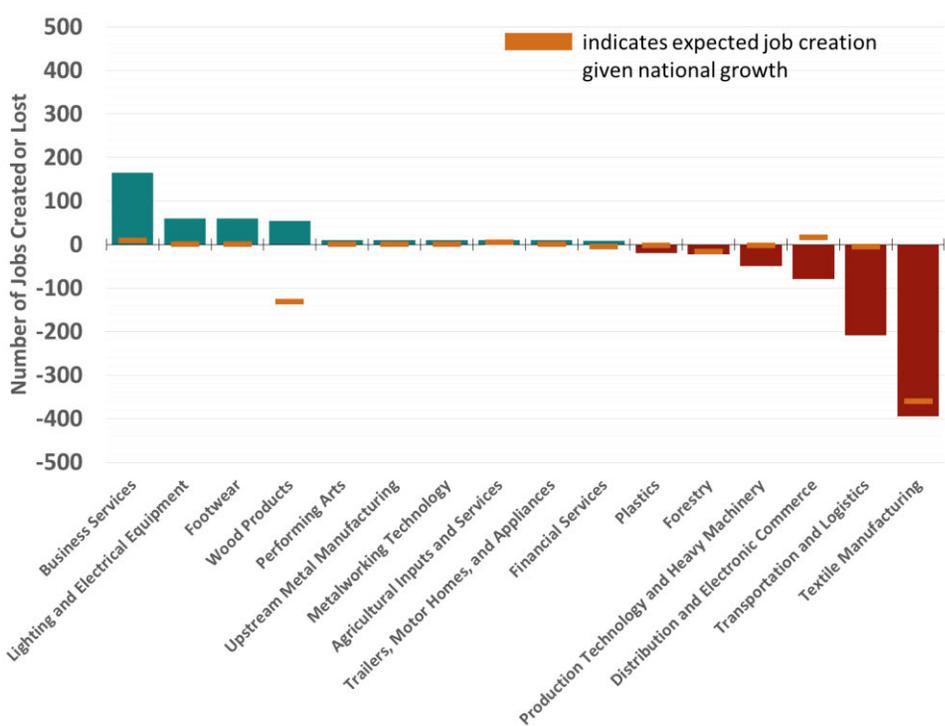
Top Clusters by Employment



Private Job Creation by Local Cluster in Jeff Davis County (2005-2014)



Private Job Creation by Traded Cluster in Jeff Davis County (2005-2014)



The top industry clusters by employment in Jeff Davis County are hospitality and tourism, education and knowledge creation, and construction products and services.

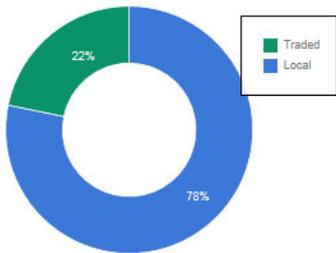
Like Culberson County, 78% of cluster industries in Jeff Davis County are local clusters, while 22% are traded clusters.

Local cluster private job creation from 2005-2014 is focused primarily on local hospitality establishments. Losses were seen across local financial services, local nonprofits, and other industry clusters.

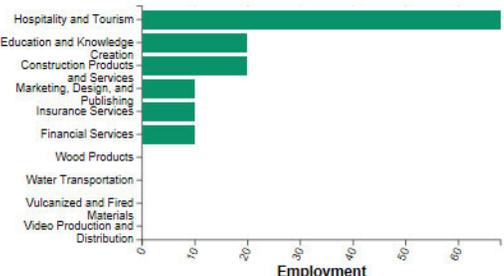
Traded cluster private job creation from 2005-2014 focused on business services, lighting and electrical equipment, footwear, and wood products. Textile manufacturing and transportation and logistics were negatively impacted during the same time period.

Jeff Davis County Cluster Portfolio (2014)

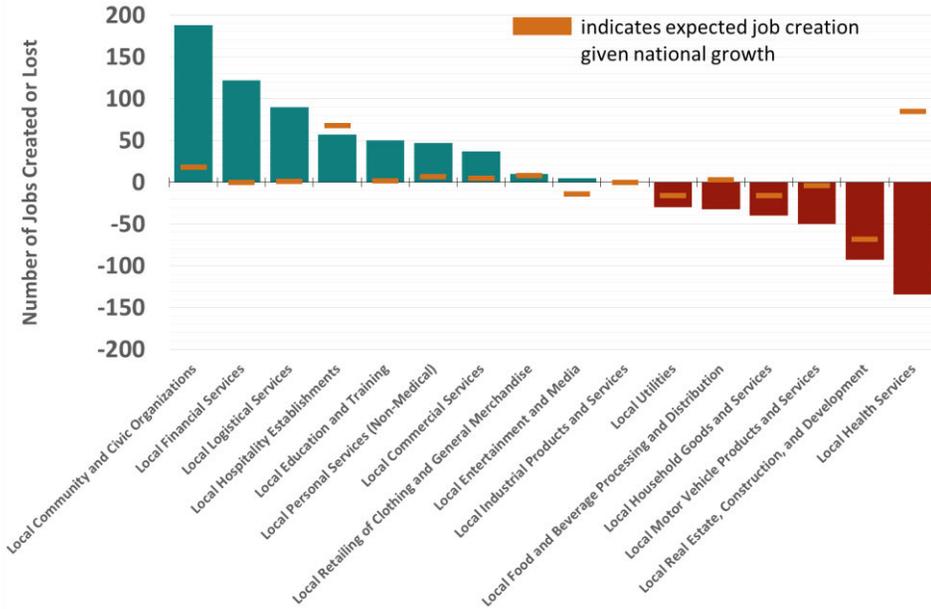
Traded vs. Local Clusters



Top Clusters by Employment



Private Job Creation by Local Cluster in Brewster County (2005-2014)



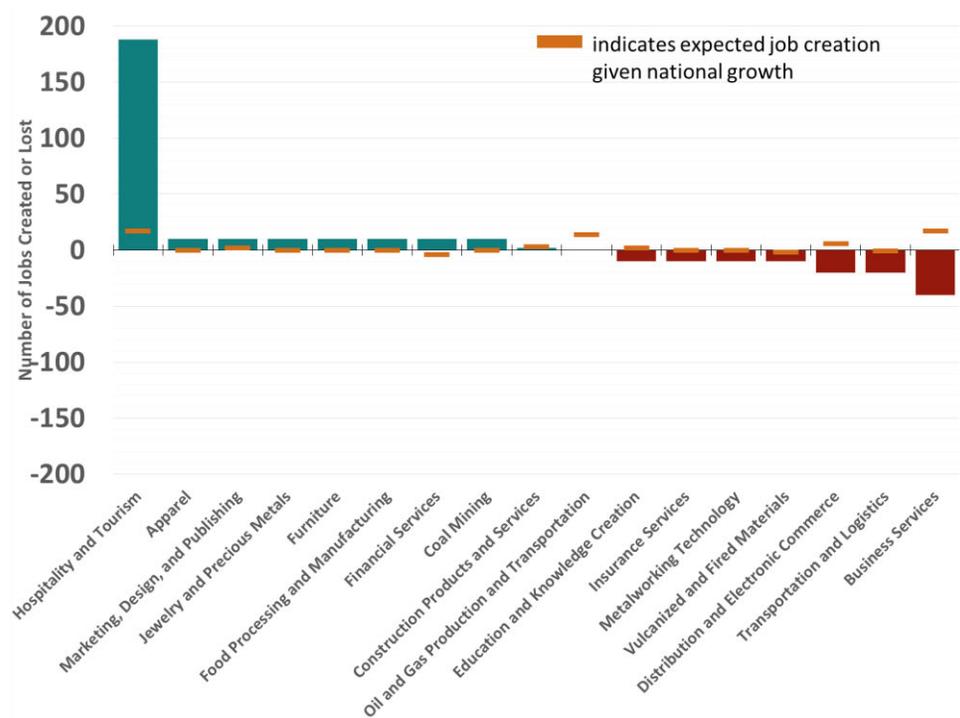
The top industry clusters by employment in Brewster County are hospitality and tourism, distribution and electronic commerce, and business services.

Like Culberson County and Jeff Davis Counties, 78% of cluster industries in Brewster County are local clusters, while 22% are traded clusters.

Local cluster private job creation from 2005-2014 is focused primarily on local community and civic organizations, local financial services, local logistical services, and local hospitality establishments. Losses were seen across local health services, local real estate, construction, and development, and other industry clusters.

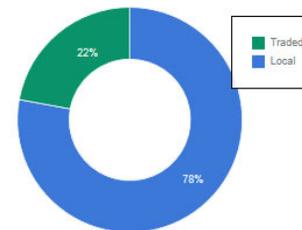
Traded cluster private job creation from 2005-2014 focused primarily on hospitality and tourism. Some losses were seen across business services.

Private Job Creation by Traded Cluster in Brewster County (2005-2014)

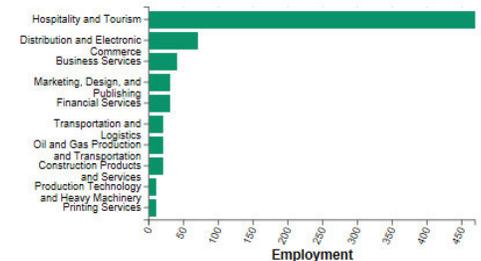


Brewster County Cluster Portfolio (2014)

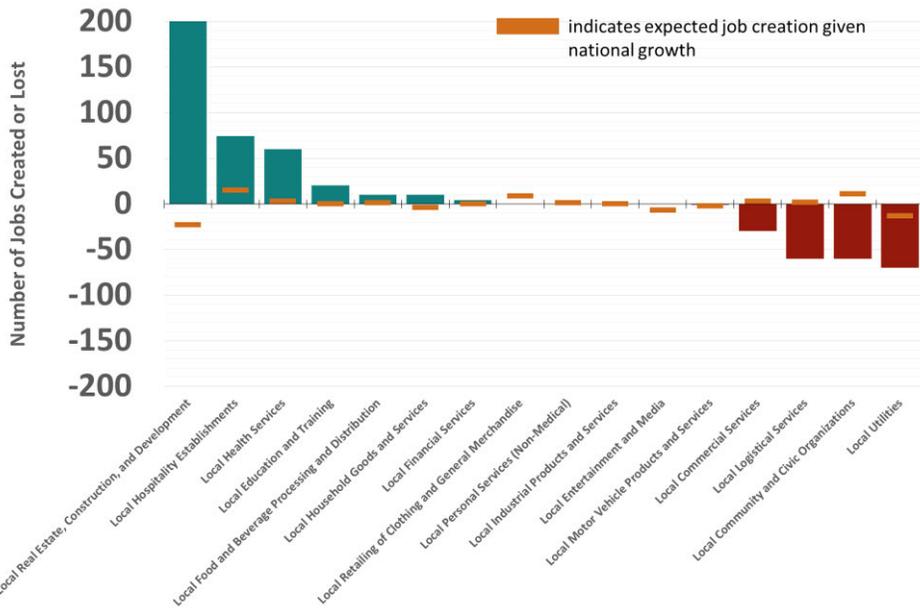
Traded vs. Local Clusters



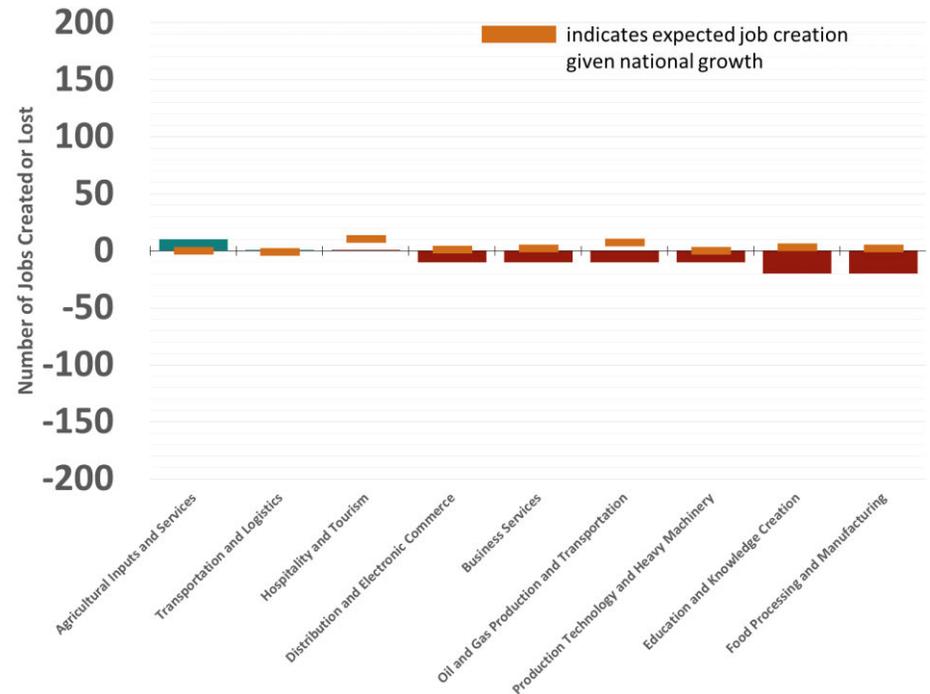
Top Clusters by Employment



Private Job Creation by Local Cluster in Presidio County (2005-2014)



Private Job Creation by Traded Cluster in Presidio County (2005-2014)



The top industry clusters by employment in Presidio County are hospitality and tourism, transportation and logistics, and financial services.

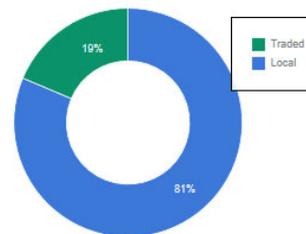
81% of cluster industries in Presidio County are local clusters, while 19% are traded clusters.

Local cluster private job creation from 2005-2014 is focused primarily on local real estate, construction, and development, local hospitality establishments, and local health services, consistent with the large tourism industry in Marfa, TX and the opening of the county clinic.

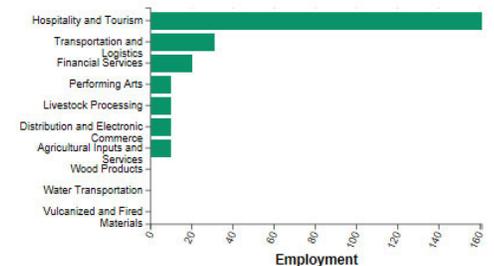
Traded cluster private job creation from 2005-2014 has remained stagnant. This is consistent with Presidio County's high unemployment rates.

Presidio County Cluster Portfolio (2014)

Traded vs. Local Clusters



Top Clusters by Employment



SECTION III: WTEDD SWOT Analysis

WTEDD SWOT Analysis for Urban Counties

STRENGTHS

- Ample availability of inexpensive land
- Ample sunlight and favorable weather
- Established regional economic development collaboratives
- Geographic location is situated on major highway routes with a strong bi-modal transportation network
- Centralized geographic location ideal for accessing the Eastern and Western Coasts, Mexico, and South America
- Region is #10 in the U.S. in exports
- Major manufacturing hub across the border
- Significant economic impact from military bases
- Bicultural and bilingual workforce
- Low cost of living
- Low cost of doing business
- Workforce / education pipelines

WEAKNESSES

- Negative impressions of low quality / high crime
- Community silos / need for infrastructure development outside of El Paso and Las Cruces
- Fragmented economic development and strategy plans throughout the region
- Inefficient / expensive border crossings
- Regional airports do not have Direct Air Service to key markets
- Lack of industry diversification
- Underdeveloped supply chain
- Limited investment capital for high-risk, non-traditional business start-ups
- Outflow of skilled / educated workforce due to competition from other regions
- Limited broadband speed (+25 Mbps) and internet connectivity
- Areas of high poverty / below average income levels
- Weak college-going culture / low graduation rates
- Limited (but growing) advocacy in Texas and U.S. Congress

WTEDD SWOT Analysis for Urban Counties

OPPORTUNITIES

- Regionalize entrepreneurialism
- Strengthen innovation through local universities
- Access to state support for growing Texas Target Industry Clusters
- Leverage military presence / retention and integration of veterans
- Leverage recent and upcoming transportation infrastructure investments
- Increase industry focus to participating in international markets, especially South American markets
- Leverage local historical, cultural, and natural assets to promote tourism
- Leverage new oil / gas production in Western Permian Basin
- Pursuing new federal and state economic development funding programs
- Ecotourism (e.g., Paso del Norte heritage, North American heritage, Spaceport tourism)
- Redevelop brownfields and vacant industrial space
- Creating outreach programs for K-12 that align with regional economic goals
- Become a world-leader in alternative energy production

THREATS

- Base Realignment and Closure (BRAC) – 2017 and future downsizing
- Natural hazards
- Continued violence along the U.S.-Mexico border / acts of terror
- Continued corruption scandals
- Limited water supply
- Competition from state, national, and international economies
- Disadvantageous state budgets (both TX and NM)
- Lack of investment in education systems
- Reliance on oil / gas revenues
- Dependence on federal revenue streams for key community and economic development programs

WTEDD SWOT Analysis for Rural Counties

STRENGTHS

- **Sul Ross University / access to higher education**
- **Vibrant tourism industry, which includes:**
 - McDonald Observatory
 - Marfa Art Scene / wedding destination
 - Biking (FM 170)
 - Birding
 - Dark skies initiative
- **Home to the largest National Park in the State of Texas**
- **Arid desert climate (health)**
- **Secure border environment**
- **Strong cooperation between law enforcement and their communities**
- **Growing relationships with Ojinaga / Chihuahua (Texas Pacifico)**
- **Access to rail for human (Amtrak)**
- **Average or higher-than average school districts (early-learning programs needed)**
- **Highly dedicated public servants**

WEAKNESSES

- **Limited (improving) access to Broadband (25+ Mbps)**
- **Limited cellphone service and coverage**
- **Limited airport capacity and access**
- **Limited accessibility to and within region / no car rentals**
- **High-cost consumer goods**
- **Limited water/wastewater and public transportation infrastructure**
- **Limited access to natural gas for households and businesses**
- **Lack of affordable housing**
- **Reduced state education funds in areas with high property values / gentrification**
- **Average-to-high unemployment rate compared to urban counties, state, nation**
- **Region is less attractive to younger families / brain drain**
- **Deterioration of buildings / limited retail stores**
- **Limited health care facilities (long, cross-county travel required)**
- **Limited financing options for small businesses**
- **Non-assimilated border patrol / homeland security presence**
- **Need for technical school and skilled tradesmen**
- **HAZMAT needed for Presidio/Ojinaga bridge**
- **Tourism slumps outside of major events and seasonal visits**

WTEDD SWOT Analysis for Rural Counties

OPPORTUNITIES

- Embracing GO TEXAN / exports
- Increased access to Broadband
- Availability of natural gas
- Diverting truck/rail freight from Mexico through Presidio/Ojinaga
- Use emerging agribusiness tech (e.g., hydroponic greenhouses)
- Possibility of silver mine being reopened
- USDA/TDA involvement and investment
- Creating Type A/B Economic Development Corps and Municipal Development Corporations to further fund development efforts
- Use of empty buildings across region
- Recognition of historical buildings/sites → funding

THREATS

- Flooding / highway blockage due to natural hazards
- Wildfires / HAZMAT in key transportation routes
- Utilities need duplication/redundancy of service providers
- Oil/gas exploration may affect tourism industry
- Lack of industry diversification
- Loss of businesses and jobs
- Depopulation
- Perception of unrest along the Mexico border
- Increasing temperatures along the border region
- Lack of water infrastructure to support long-term growth
- Loss of historical buildings
- Large number of absentee business and home owners

SECTION IV: STRATEGIC DIRECTION AND ACTION PLAN

REGIONAL VISION

The West Texas Economic Development District (WTEDD) region will become a preferred location for businesses and entrepreneurs looking for:

- A unique region proud of its identity and cultural heritage,
- A dynamic, globally-competitive workforce,
- World-class public infrastructure,
- High quality of life for new and existing residents, and
- A supportive environment that is conducive to strong, sustainable, and resilient economic growth and prosperity.

STRATEGIC RECOMMENDATIONS

The 2016-2020 CEDS Strategy Committee is composed of members living in both the urban and rural WTEDD counties. Strategy Committee meetings were held in the City of El Paso, TX and in the City of Marfa, TX, to ensure equal representation and encourage participation from stakeholders from across the region. Communication and collaboration across both groups was made possible through webinar and teleconference.

As the CEDS Strategy Committee worked through the SWOT process, discussion over economic, workforce, and infrastructure development, affordable market-rate and low-income housing, and quality of life led to the creation of nine Strategic Recommendations and their respective Key Actions. Many of these recommendations come from the strategic planning process of regional economic development stakeholders such as the [Borderplex Alliance](#), [Workforce Solutions Borderplex](#), [the City of El Paso](#), the University of Texas at El Paso (UTEP) [Hunt Institute for Global Competitiveness](#), El Paso Community College, New Mexico State University (NMSU) [Arrowhead Center](#), the [Presidio Municipal Development District](#), [Innovation Frontera](#), and from publications and discussions with the different municipalities, chambers of commerce, business development centers, and private businesses in the region.

The CEDS Strategy Committee's 2016-2020 Strategic Recommendations are:

1. Increase Economic Ties with Mexico and Latin America
2. Increase Cooperation between Local Economies
3. Become Known for Quality through Workforce Development and World-Class Education Programs
4. Increase Investments in Broadband, Renewable Energy, and Public Infrastructure
5. Leverage the Significant Military Presence in the Region
6. Alleviate Regional Housing Issues
7. Strengthen the Region's Position as a Tourist and Retail Destination
8. Spur Innovation and Entrepreneurialism
9. Promote Economic Resiliency

RECOMMENDATION 1: Increase Economic Ties with Mexico and Latin America

Key Actions

- 1.1 **Hold an Annual Economic Development Conference** to bring together the public, private, and nonprofit sectors on both sides of the U.S.-Mexico Border to discuss regional and border issues (e.g., [2016 U.S.-Mexico Border Summit](#) by the Borderplex Alliance, the [Innovation Frontera Leadership Summit 2016](#), and [Border Governors Conference 2016](#))
- 1.2 **Capitalize on Existing and Emerging Conditions across the U.S.-Mexico Border to Expand Diversity in Economic Activity**, including:
 - Engage role models and increase regional exposure of the “cool things happening,” as described in [Innovation Frontera](#)
 - Develop and market [Network Co-Working Spaces](#) at and for businesses and entrepreneurs on both sides of the border
 - Coordinate events hosting entrepreneurs and venture capitalists from Mexico and Latin America, such as the [Paso del Norte Venture Capital Competition](#)
 - Recruiting, retaining, and supporting the expansion of existing businesses venturing into border trade and business services
 - Creating support channels for start-ups and micro-businesses on both sides of the border, including technical assistance
- 1.3 **Coordinate Public Policy across the U.S.-Mexico Border to Increase the Efficiency of Border Crossings**, including:
 - The passing of legislation positively impacting border trade (e.g., [Border Enforcement Accountability, Oversight and Community Engagement Act of 2015](#), spearheaded by U.S. Congressman Beto O'Rourke)
 - Adopting local policies aimed at facilitating trade and expedite border crossings via an [economic bloc](#) between local mayors
 - Advocate for beneficial policies at centers of influence by supporting the work of [the Borderplex Alliance](#) and the [Greater El Paso Chamber of Commerce](#), to include advocacy in Washington, D.C., Mexico City, Austin, Chihuahua, and Santa Fe
 - Increasing organizational capacity via the continued creation of administrative bodies such as a Border Development Authority, Freight District or Port Authority (e.g., [Presidio International Port Authority](#)), and Border Zone Development Corporations, Business Improvement Districts / Community Development Corporations, with support from the [Texas Ahead Initiative](#)
- 1.4 **Multiple other mid-term and short-term strategies**, which include but are not limited to:
 - Freight and infrastructure planning (e.g., [UTEP Border Region Modeling Project](#) and the Paso del Norte Interdisciplinary Research Platform's [Cross-border Rail Infrastructure Assessment](#))
 - Develop a plan to measure, attract, and increase business to and from Latin America
 - Implementing Lean Six Sigma for border crossings,

RECOMMENDATION 2: Increase Cooperation between Local Economies

Key Actions

- 2.1 **Leverage Presidio/Ojinaga as a Competitive Gateway for Trade**, as described by the [Presidio Municipal Development District](#), by:
 - Reconstructing the Ojinaga-Presidio Railroad bridge to revive international rail freight in the region
 - Making improvements to US 67 from Presidio, TX to Marfa, TX to allow increased truck freight
 - Increasing the warehousing capacity in Presidio, TX by at least 100,000 sq. ft.
 - Proposing to truck and rail freight companies to use the Presidio/Ojinaga Port of Entry to reduce costs
- 2.2 **Support the Borderplex Alliance as a Regional Economic Development Organization** and its goals as defined in the [2015 Regional Strategic Report for the North American Borderplex](#)
 - Determine the role and support offered by each regional economic development stakeholder connected to the Borderplex Alliance
- 2.3 **Create a Cooperative Economic Development Body for the rural WTEDD Counties**, similar to the Borderplex Alliance
 - Use the WTEDD CEDS Process and Annual CEDS Revisions to continue to bring together regional economic development stakeholders at least four times per year
 - Leverage technical support from the Borderplex Alliance
- 2.4 **Create a Regional Data and Economic News Repository**, which includes:
 - Adopting guidelines and data tools from the [International Economic Development Council \(IEDC\)](#)
 - Creating and maintaining regional databases and analytical tools
 - Publishing and disseminating regional datasets and news
 - Providing technical data support to communities in the region by updating their Jurisdictional Profiles on an annual basis
- 2.5 **Multiple other mid-term and short-term strategies**, which include but are not limited to:
 - Create geospatial models of key economic factors affecting the region (e.g., [Helix Solutions](#), [Secure Origins](#))

RECOMMENDATION 3: Become Known for Quality

Key Actions

- 3.1 **Support the Borderplex Alliance by Adopting the Strategic Goal 2: “Become Known for Quality”**, as defined in the [2015 Regional Strategic Report for the North American Borderplex](#). Areas of priority include:
- Promoting Overriding Regional Quality
 - Improving Regional Infrastructure
 - Developing Higher Workforce Skills
 - Improving “Destination Factor”
- 3.2 **Support the Workforce Solutions Borderplex in Creating a Dynamic and Globally-Competitive Workforce** as defined in its [Mission, Vision, & Goals](#). This includes, but is not limited to:
- Mapping regional assets to identify economic development stakeholders and resources
 - Conducting a skills gap analysis to align targeted industry clusters in the Borderplex with educational opportunities
 - Developing and implementing a plan to increase presence in rural areas
 - Increasing employment of veterans in partnership with employers by 20%
 - Creating a job readiness curriculum and assessment for HS Seniors in partnership with urban and rural ISD’s to better prepare young adults to be more marketable in the workforce
- 3.3 **Support Regional Colleges and Universities in Developing World-Class Education Programs and Workforce Pipelines.**
- Fund K-12 initiatives focusing on STEM, [modernizing facilities](#), and [college attainment initiatives](#), such as the [CREED Girls who Code](#) and the [Bridge of Southern New Mexico](#)
 - Connect [local technology education and research programs](#) to local [entrepreneurship initiatives](#) and [incubators](#), including supporting the expansion of the [Medical Center of the Americas Campus](#), supporting the career and technology expansion efforts in the El Paso Community College [10-year Facilities Plan](#), and supporting [advanced health research-to-service initiatives](#) from the new Burrell College of Osteopathic Medicine
 - Adopt regional education support systems in line with the [Adopt the Texas 60x30TX Strategic Plan](#), as supported by [CREED](#)
 - Regionalize post-secondary education and workforce pipelines tailored to existing and income local industry needs, to include [Doña Ana Community College Workforce Training Programs](#) and strategies and best practices identified in the NM Workforce Connections [Strategic Plan](#)

RECOMMENDATION 4: Increase Investments in Broadband, Renewable Energy, and Public Infrastructure

Key Actions

- 4.1 **Ensure that All Population Centers have Access to Broadband (25+ mbps)**
- Identify broadband service gaps in [National Broadband Map](#)
 - Pursue federal and state funding opportunities to add broadband to community centers
 - Collaborate with service providers to reduce the broadband service gap for residential customers
 - Coordinate with TxDOT to develop fiber infrastructure
- 4.2 **Become [the Solar Energy Capital](#) of the United States**
- Create a regional renewable energy strategy supported by [El Paso Electric](#), [Texas-New Mexico Power](#), and [American Electric Power](#)
 - Make investments necessary to achieve 200 megawatts of locally generated solar power by 2020
 - Create a Renewable Energy Center of Excellence
- 4.3 **Embrace Wind Energy**, if economically feasible, by pursuing [Renewable Electricity Production Tax Credit \(PTC\)](#), as have other regions across the U.S.-Mexico Border and in West Texas
- 4.4 **Continue to Invest in and Pursue Funding for Infrastructure Projects**, including, but not limited to:
- Building an AMTRAK railway facility/station in Marfa, TX
 - Expanding intermodal connectivity between truck, rail, and air at key points in Southern Doña Ana County
 - Developing commercial and residential infrastructure in the El Paso – Las Cruces corridor
 - Expanding the [Gold and Silver Routes](#) and creating other regionally-coordinated public transit systems
- 4.5 **Multiple other mid-term and short-term strategies**, which include but are not limited to:
- Strengthening existing communities affected by infrastructure development (e.g., residential planning in response to the [UP Santa Teresa Yard](#))
 - Supporting community facilities such as schools, parks, utilities, libraries, community centers, and roads in response to economic development activity

RECOMMENDATION 5: Leverage the Significant Military Presence in the Region

Key Actions

- 5.1 **Support the Development of a Defense Industry Cluster**, as [proposed](#) by the Borderplex Alliance:
- Attract private companies who aim to develop, manufacture, and provide defense/homeland security technologies and services
 - Attract private companies or support entrepreneurs that can meet the demands of the regional military complex, which include research, development, and testing, maintenance and repair, support with modernization, training and education, and manufacturing
- 5.2 **Meet Demand for Support Services for Current Military Personnel, their Families, and Veterans**
- Increase employment of veterans in partnership with employers by 20%, as [proposed](#) by Workforce Solutions Borderplex
 - Expansion of services to rural areas
 - Increase quality-of-life investments in areas that are accessible from base to military personnel in support of the work done by the [Greater El Paso Chamber of Commerce](#)
 - Expand [Military Relocation Support](#) services in coordination with investments made in-base such as the [expansion](#) of the William Beaumont Army Medical Center
 - Continue to support the El Paso Veterans Affairs Health Care System [proposal](#) by Congressman Beto O'Rourke and the Paso del Norte Health Foundation's [Health Information Exchange](#) program
- 5.3 **Pursue Federal and State Funding and Private Investment to Further Support Defense Communities**, such as the [DEAAG](#)
- 5.4 **Commercialize Military Technology and Expertise**
- Develop high-tech manufacturing driven by the concept of applying military-grade engineering to wholly commercial components
 - Support [Blue Origin](#) and other entrepreneurial ventures looking to commercialize military prototype technologies
- 5.5 **Multiple other mid-term and short-term strategies**, which include but are not limited to:
- Continue to expand [SBA's](#) Veteran's Job Fairs, and [Entrepreneurship Fairs](#) into rural regions
 - Continue to measure the economic impact of military bases [\[1\]](#) [\[2\]](#) in the WTEDD region
 - Increase visibility for the El Paso Community College [Contract Opportunities Center](#) for federal defense procurement opportunities

RECOMMENDATION 6: Alleviate Regional Housing Issues

Key Actions

- 6.1 **Determine the Impact of Housing Affordability on Regional Economy**
 - Create a Regional Housing Taskforce to review and report on the impact of market-rate and affordable housing across the region
 - Work with employers, state and local housing and development agencies, banks, and private developers to encourage the development of affordable housing on a biannual basis

- 6.2 **Explore Trends in Regional Housing Supply and Demand**, including:
 - Review and respond to findings from HUD Comprehensive Housing Market Analyses, such as the [2015 El Paso Analysis](#) and [2011 Las Cruces Analysis](#)
 - Review and respond to publications that explore the [affordability of housing](#) across different markets
 - Understand policies limiting [AirBnB](#) and other short-term rental services that negatively impact housing in a region
 - Ensure city codes allow for and encourage affordable housing options

- 6.3 **Increase the Supply of Affordable Housing through Private-Public Partnerships** such as [HACEP RAD](#)

- 6.4 **Incentivize the Development of Multi-Family Housing**

- 6.5 **Encourage Housing Rehabilitation**
 - Seek funding from [housing rehabilitation programs](#) and [homebuyer purchase programs](#)

RECOMMENDATION 7: Strengthen the Region's Position as a Tourist and Retail Destination

Key Actions

- 7.1 **Put the North American Borderplex on the Map**, as [proposed](#) by the Borderplex Alliance:
- Establish a World Trade Center Market Place
 - Attract International Industry and Regional Conferences
 - Regionalize the El Paso International Airport
 - Become the Top Bilingual, Bi-national Center on the U.S.-Mexico Border
- 7.2 **Make Quality of Life and Beautification Improvements** to the region's downtown districts
- Support strategic goals established in local tourism and retail plans such as [2015 El Paso Downtown Master Plan](#), [2016-2017 Visit Las Cruces Marketing Plan](#), and the [City of Alpine Vision Plan](#)
 - Aggressively pursue [downtown](#) and [Main Street revitalization](#) funding
- 7.3 **Research the Economic Impact of Mexican Shoppers in the Region**
- Pursue funding for retail economic assessments such as those published by the [Federal Reserve Bank of Dallas](#), [SABER Research Institute](#)
 - Align the retail sector to better serve Mexican shoppers in order increase El Paso's and Presidio's market share
- 7.4 **Expand [West Texas Tourism Guides](#)** to include tourism expansion planning efforts by the [City of Alpine](#), [Viva Big Bend](#), [Destination El Paso](#)
- 7.5 **Expansion and Renovation of Airports in Rural Counties to Accommodate [Current](#) and Future Tourism Efforts**

RECOMMENDATION 8: Spur Innovation and Entrepreneurialism

Key Actions

- 8.1 **Create a Supportive Ecosystem** for entrepreneurs and innovators, as [proposed](#) by the Borderplex Alliance:
- Regionalize entrepreneurial events
 - Develop additional co-working spaces and innovative collaborative business models
 - Attract angel funding
 - Make the Borderplex Region the “Entrepreneurial Gateway to Latin America”
- 8.2 **Coordinate Centers of Excellence**, as [proposed](#) by the Borderplex Alliance:
- Coordinate university research to advance capabilities and results
 - Jointly apply for state and national grants
- 8.3 **Support Supply Chain Development**, as [proposed](#) by the Borderplex Alliance

RECOMMENDATION 9: Promote Economic Resiliency

Key Actions

- 9.1 **Incorporate the [City of El Paso Resiliency Strategy](#) into the CEDS**
- 9.2 **Identify and Leverage Existing Resources to Respond to Potential Shocks to the Region's Economy**, including:
 - Multi-Hazard Mitigation Action Plans funded by FEMA for the counties of El Paso, Hudspeth, Culberson, Jeff Davis, Presidio, and Brewster and the incorporated cities within for a total of twenty nineteen jurisdictions
 - The Threat and Hazard Identification and Risk Assessment (THIRA) coordinated by the Rio Grande Council of Governments
- 9.3 **Increase Economic Diversity in the Rural WTEDD Counties**
- 9.4 **Promote the Development of Continuity of Operations Plans ("[Business Continuity Plans](#)")** through local small business development centers
- 9.5 **Ensure the Redundancy of Telecommunications Services, Broadband Networks, and Public Utilities**
 - Leverage regional planning efforts such as the [2016-2021 Far West Texas Water Plan](#) to ensure the sustainable use of water in the region and to determine necessary water infrastructure investments
- 9.6 **Incorporate "[Buy Local](#)" and the [Go-Texan](#) Initiatives as Part of the Greater Economic Resiliency Efforts**

SECTION V: PERFORMANCE MEASURES

PLAN IMPLEMENTATION

The 2016-2020 Comprehensive Economic Development Strategy (CEDS) is a thorough analysis of the region's existing conditions and perceptions of the region's strengths, weaknesses, opportunities, and threats. The CEDS offers strategic recommendations and actions to support growth from its current conditions. Measurable performance metrics are necessary in order to ensure that the recommended Key Actions are implemented by regional stakeholders, economic development projects receive exposure and support, and that results from such projects are quantified. This section will focus on the CEDS evaluation criteria that will be used to ensure the successful implementation of the CEDS.

The Strategic Recommendations presented in the 2011-2015 CEDS were evaluated by WTEDD staff and the WTEDD Strategy Committee as part of the 2016-2020 CEDS process. Each Strategic Recommendation was evaluated based on the impact, frequency, and the visible progress of relevant initiatives and projects.

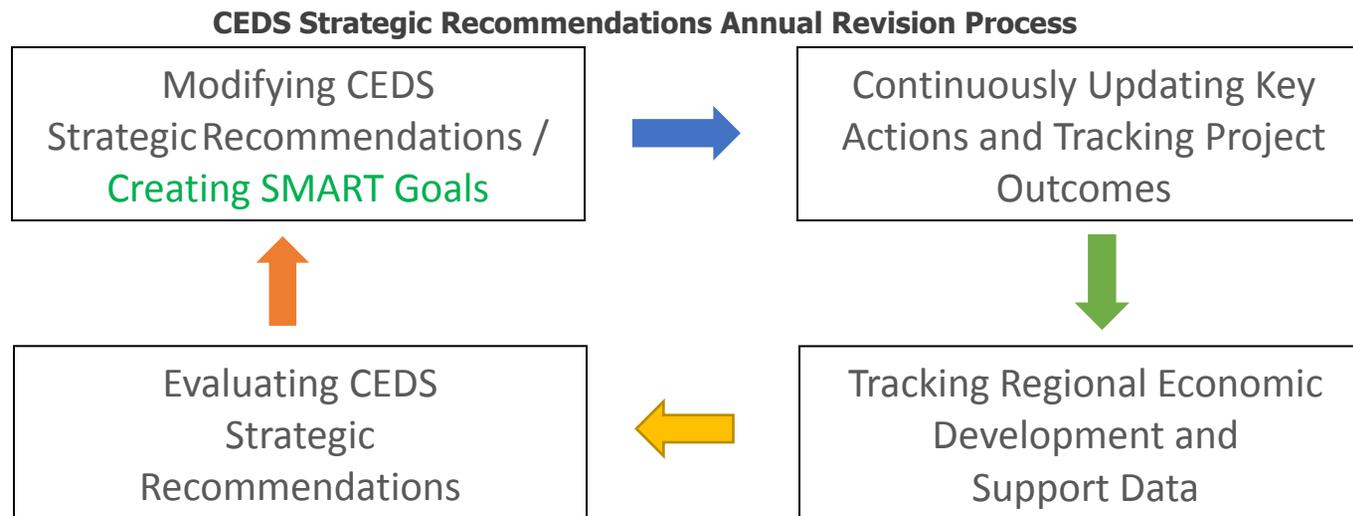
At the end of the evaluation process, the WTEDD Strategy Committee recommended to modify, merge, and add new Strategic Recommendations in an effort to align the strategic plans of local jurisdictions and other regional economic development organizations and to adapt to the changing regional economic landscape. Through this initiative, tracking the progress made in each Strategic Recommendation becomes a regional effort that can be measured by job and workforce growth, public and private investments made in the region, regional wealth indicators, and economic trend data.

In addition to these core performance metrics, the impact of the CEDS will be evaluated through changes in regionally-unique economic performance and asset-building and wealth creation indicators in the areas of housing, public health, education programs, quality of life, resiliency, and national innovation indices.

In summary, following performance metrics will be used to evaluate the impact of the CEDS on the WTEDD Region:

- Number of jobs created at the county level after the implementation of the CEDS
- Monitoring of number, type, and dollar amount of investments made in the region at the county level
- Monitoring of county business patterns to quantify business growth and decline at the county level
- Monitoring of county industry patterns to quantify private job creation and losses at the county level
- Monitoring of county government programs to quantify public job creation and losses at the county level
- Monitoring of economic impact from trade with Mexico to include value of exports, retail, and regional collaborations
- Dollar amount of economic impact of military bases in the region
- Changes in employment and unemployment
- Changes in average hourly wages
- Changes in poverty rates
- Changes in median household income
- Changes in per capita income
- Changes in educational attainment of 25-44 demographic
- Changes in county population
- Changes in housing occupancy rates and housing costs at the county level
- Changes in health insurance coverage
- Quality of Life and Well-Being measures as described in Healthy People 2020's [County Health Rankings](#)
- Return on Investment (ROI) on WTEDD initiatives

PERFORMANCE UPDATES



The CEDS is an evolving document intended to foster meaningful and sustainable collaboration across public, private, nonprofit, and traditional and non-traditional political boundaries. As such, the CEDS will be revised on a yearly basis, to include the updating of Strategic Recommendations, Key Actions, datasets, document hyperlinks, and the analyses of regional economic trends.

The CEDS Strategy Committee will convene at least four times per year to evaluate the effectiveness of the 2016-2020 Strategic Recommendations and their respective Key Actions as written. Individual projects throughout the region will be examined for congruency to the 2016-2020 Strategic Recommendations. Changes in the aforementioned performance measures will be reviewed as part of the evaluation process based on the availability of data.

It is expected that additional Key Actions will be added to the 2016-2020 Strategic Recommendations to continue to align strategic and economic development efforts across the region and to adapt to changes in the regional economic landscape. The Strategy Committee will continue to suggest changes to the CEDS for future updates in order to make it more effective for the region's use.

WTEDD staff and the CEDS Strategy Committee will reframe the 2016-2020 Strategic Recommendations and Key Actions as SMART goals in future CEDS revisions. This move is intended to better measure the impact of the CEDS, the Strategic Recommendations, and their respective Key Actions, in order to transform the CEDS into a more action-driven planning process. Currently, only a limited number of activities with the highest priority and potential for regional impact are identified and described.

WTEDD staff is also currently exploring non-traditional but widely used economic evaluation methods, such as the Wealthworks [Eight Capitals of Wealth](#), to better evaluate the impact of the CEDS process in the region.

ONGOING PUBLIC PARTICIPATION

The 2016-2020 CEDS process involved engaging a broad and diverse set of stakeholders, who shared with WTEDD staff and the Strategy Committee their expertise and worldviews in order to address economic problems and leverage economic opportunities in the WTEDD region. WTEDD staff traveled across the region to inform city and county governments of the CEDS process, to gather input about the needs, goals, and strategies of each municipality, and to engage public officials and staff as Strategy Committee members. Additionally, WTEDD staff engaged stakeholders from the private sector working in the health, tourism, retail, transportation, and business industries.

Strategy Committee meetings are held publicly in the City of El Paso and in the City of Marfa to ensure that all regional stakeholders and members of the public had the opportunity to contribute to the CEDS, as prescribed in the Texas Open Meetings Act and Texas Public Information Act.

To ensure the ongoing participation of the public, a public comment period soliciting and addressing public comments is scheduled for **November 21 - December 21, 2016**. During this period, drafts of the 2016-2020 CEDS will be submitted for review to public and private economic development stakeholders across the WTEDD region, including Doña Ana and Otero Counties in New Mexico. Stakeholders are asked to share the 2016-2020 CEDS across their communication networks. Public comments will be reviewed during Strategy Committee meetings as part of the development of the 2016-2020 CEDS.

WTEDD 2016-2020 CEDS Stakeholder Engagement



Public comments will be reviewed during Strategy Committee meetings as part of the development of the 2016-2020 CEDS. Drafts of the 2016-2020 CEDS are available on the [Rio Grande Council of Governments](http://www.riocog.org/Rio_Grande_Council_of_Governments) website using the following URL: <http://www.riocog.org/REGSVCS/rs.htm#econdev.htm>.

Public comments may also be sent by email to omarm@riocog.org and jonmtabor@bigbend.net, by fax at 915-532-9385, or by mail addressed to:



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