RESOLUTION

WHEREAS, the Rio Grande Council of Governments (RGCOG) is a voluntary association of local governments established under state law to promote coordination and cooperation in the delivery of governmental services within the Upper Rio Grande State Planning Region in accordance with the Texas Local Government Code, Chapter 391; and

WHEREAS, the RGCOG Board of Directors serves as the West Texas Economic Development District (WTEDD) Governing Board in accordance with the U.S. Economic Development Administration; and

WHEREAS, the WTEDD Governing Board assigned a committee to assist in the update of the 2016-2020 Comprehensive Economic Development Strategy (CEDS) for the West Texas Economic Development District; and

WHEREAS, the CEDS is designed to bring together the public and private sectors in the creation of an economic roadmap to diversify and strengthen Regional economies.

NOW THEREFORE, BE IT RESOLVED that the Rio Grande Council of Governments' Board of Directors approves the submission of the 2016-2020 Comprehensive Economic Development Strategy to the U.S. Economic Development Administration.

Passed and approved on this day, the 27th of January 2017.

Honorable Carlos Leon  
RGCOG Board President

Annette Gutierrez  
RGCOG Executive Director
# West Texas Economic Development District

**COMPREHENSIVE ECONOMIC DEVELOPMENT STRATEGY: 2016-2020**

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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 20 elected members of local jurisdictions and 3 ex-officio members 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.

For EDA funding purposes, this document serves as the CEDS for the WTEDD region, which includes the Texas counties of El Paso, Hudspeth, Culberson, Jeff Davis, Presidio, and Brewster. Due to their social and economic interconnectedness with the WTEDD region, Doña Ana and Otero Counties in New Mexico were included in the analyses presented in this document. The WTEDD CEDS can certainly be used in conjunction with other economic and community development plans in Doña Ana and Otero Counties. Agencies looking to apply for funding with EDA in Doña Ana County should also look into the South Central Council of Governments region CEDS, and the South Eastern New Mexico Economic Development District in Otero County.

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 have not yet reached state and national levels and unemployment continues to be a challenge in parts of the region, educational attainment is increasing rapidly, especially among youth entering the workforce. 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.
Economic Development Opportunities and Barriers

Extensive data collection was performed to guide a regional SWOT (strengths, weaknesses, opportunities, and threats) analysis process, exploring regional trends in population, education, income, labor force, jobs and employment, housing, transportation, public health, infrastructure, natural resources, and business growth and clustering.

Through the SWOT analysis process, the WTEDD Strategy Committee identified a series of core regional characteristics under the lens of economic development and quality of life improvements.

The WTEDD region is blessed with a large number of assets that can be leveraged to stand above competition, 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.

A more comprehensive assessment of strengths, weaknesses, opportunities, and threats is also available in Section III in this document.

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 weather
- Central geographic location
- Large military complex
- Economic, cultural, and social exchange with Mexico
- Bicultural and bilingual workforce
- Education programs
- Cooperation between law enforcement and their communities
- Cultural and natural assets suited for tourism

**OPPORTUNITIES**
- International trade
- Further leverage military complex and veteran services
- Leverage historical, cultural, and natural assets
- Clean energy production
- Border crossing improvements
- Ongoing public infrastructure investments
- New private investments
- Attraction of industries from quality-of-life investments
- Borderplex branding
- Knowledge transfer from military installations

**WEAKNESSES**
- Losses due to border inefficiency
- Limited financing options
- Negative perceptions of low quality and high crime
- High poverty rates
- Low education rates
- Outflow of skilled and educated workforce
- Need for infrastructure development
- 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 utility services 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 area for businesses creation and relocation 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 ecosystem 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 communities and economic development stakeholders, 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, El Paso Community College (EPCC) Small Business Development Center and Contract Opportunity Center, 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 Education Programs Tailored to Industry Needs
4. Increase Investments in Communication Technology, Energy Production, and Infrastructure
5. Leverage the Significant Military and Law Enforcement Presence in the Region
6. Alleviate Issues in Housing and Health Care Services
7. Strengthen the Region’s Position as a Tourist and Retail Destination
8. Spur Innovation and Entrepreneurialism
9. Promote Economic Resiliency
10. Promote the Rural Lifestyle
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 the results from such projects are quantified. The impact of the CEDS on the region will be evaluated based on the results, frequency, and the visible progress of relevant initiatives and projects. Additionally, county-level changes in the following core performance metrics will be tracked:

- Number of jobs created after the implementation of the CEDS
- Monitoring of number, type, and dollar amount of investments made in the region
- Monitoring of county business patterns to quantify business growth and decline
- Monitoring of county industry patterns to quantify private job creation and losses
- Monitoring of county government programs to quantify public job creation and losses
- 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 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 recreating visualizations and figures based on the latest data available.

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.

Greater WTEDD Region Population per Square Mile (2015)

<table>
<thead>
<tr>
<th>Region</th>
<th>WTEDD Region, including TX and NM Counties</th>
<th>WTEDD TX Counties</th>
<th>WTEDD TX excluding El Paso</th>
<th>El Paso</th>
<th>Brewster</th>
<th>Culberson</th>
<th>Hudspeth</th>
<th>J eff Davis</th>
<th>Presidio</th>
<th>Texas</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total population</td>
<td>1,138,042</td>
<td>859,385</td>
<td>23,792</td>
<td>835,593</td>
<td>9,145</td>
<td>2,236</td>
<td>3,379</td>
<td>2,156</td>
<td>6,876</td>
<td>261,232</td>
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<tr>
<td>Land area (square miles)</td>
<td>32,143</td>
<td>21,710</td>
<td>20,696</td>
<td>1,014</td>
<td>6,192</td>
<td>3,812</td>
<td>4,571</td>
<td>2,265</td>
<td>3,856</td>
<td>8,360</td>
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<tr>
<td>Persons per square mile</td>
<td>35.4</td>
<td>39.6</td>
<td>1.1</td>
<td>824.1</td>
<td>1.5</td>
<td>0.6</td>
<td>0.7</td>
<td>1.0</td>
<td>1.8</td>
<td>105.2</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Region</th>
<th>Greater WTEDD Total, including Chihuahua Municipios</th>
<th>WTEDD NM Counties Total</th>
<th>Doña Ana</th>
<th>Otero</th>
<th>New Mexico</th>
<th>Chihuahua Municipios Total</th>
<th>Ciudad Juárez</th>
<th>Manuel Ojinaga</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total population</td>
<td>2,543,765</td>
<td>278,657</td>
<td>214,295</td>
<td>64,362</td>
<td>2,085,109</td>
<td>1,440,669</td>
<td>1,409,987</td>
<td>30,682</td>
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<tr>
<td>Land area (square miles)</td>
<td>37.684</td>
<td>10.433</td>
<td>3.807</td>
<td>6.626</td>
<td>121,298</td>
<td>5,541</td>
<td>3,856</td>
<td>3,666</td>
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<tr>
<td>Persons per square mile</td>
<td>67.5</td>
<td>26.7</td>
<td>56.3</td>
<td>9.7</td>
<td>17.2</td>
<td>260.0</td>
<td>752.8</td>
<td>8.4</td>
</tr>
</tbody>
</table>

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.

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.
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.
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)

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

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

Source: 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)

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Brewster</th>
<th>Culberson</th>
<th>Hudspeth</th>
<th>Jeff Davis</th>
<th>Presidio</th>
<th>Texas</th>
<th>United States</th>
</tr>
</thead>
<tbody>
<tr>
<td>High school, some college, or associate’s degree (Age 25+)</td>
<td>86.6%</td>
<td>65.2%</td>
<td>53.2%</td>
<td>85.1%</td>
<td>55.0%</td>
<td>81.6%</td>
<td>86.3%</td>
</tr>
<tr>
<td>Bachelor’s degree or higher (Age 25+)</td>
<td>36.3%</td>
<td>11.7%</td>
<td>8.4%</td>
<td>38.4%</td>
<td>22.0%</td>
<td>27.1%</td>
<td>29.3%</td>
</tr>
<tr>
<td>18-24 high school, some college, or associate’s degree</td>
<td>77.4%</td>
<td>87.0%</td>
<td>72.7%</td>
<td>41.1%</td>
<td>40.9%</td>
<td>74.5%</td>
<td>75.3%</td>
</tr>
<tr>
<td>18-24 bachelor’s degree or higher</td>
<td>15.1%</td>
<td>2.4%</td>
<td>2.6%</td>
<td>0.0%</td>
<td>10.9%</td>
<td>7.0%</td>
<td>9.6%</td>
</tr>
<tr>
<td>25-34 high school, some college, or associate’s degree</td>
<td>93.8%</td>
<td>84.5%</td>
<td>70.6%</td>
<td>67.4%</td>
<td>90.4%</td>
<td>84.8%</td>
<td>88.3%</td>
</tr>
<tr>
<td>25-34 bachelor’s degree or higher</td>
<td>31.0%</td>
<td>11.7%</td>
<td>3.0%</td>
<td>16.0%</td>
<td>27.5%</td>
<td>32.4%</td>
<td></td>
</tr>
<tr>
<td>35-44 high school, some college, or associate’s degree</td>
<td>94.1%</td>
<td>85.2%</td>
<td>38.8%</td>
<td>79.3%</td>
<td>52.4%</td>
<td>82.0%</td>
<td>87.7%</td>
</tr>
<tr>
<td>35-44 bachelor’s degree or higher</td>
<td>52.5%</td>
<td>15.2%</td>
<td>4.2%</td>
<td>28.4%</td>
<td>22.5%</td>
<td>29.1%</td>
<td>32.8%</td>
</tr>
<tr>
<td>45-64 high school, some college, or associate’s degree</td>
<td>86.4%</td>
<td>62.7%</td>
<td>56.7%</td>
<td>88.5%</td>
<td>60.7%</td>
<td>82.5%</td>
<td>88.0%</td>
</tr>
<tr>
<td>45-64 bachelor’s degree or higher</td>
<td>36.6%</td>
<td>9.5%</td>
<td>10.8%</td>
<td>38.0%</td>
<td>21.7%</td>
<td>27.6%</td>
<td>29.1%</td>
</tr>
<tr>
<td>65+ high school, some college, or associate’s degree</td>
<td>77.7%</td>
<td>41.1%</td>
<td>42.6%</td>
<td>86.7%</td>
<td>34.3%</td>
<td>75.2%</td>
<td>80.0%</td>
</tr>
<tr>
<td>65+ bachelor’s degree or higher</td>
<td>28.9%</td>
<td>13.7%</td>
<td>11.5%</td>
<td>45.6%</td>
<td>10.5%</td>
<td>23.0%</td>
<td>23.2%</td>
</tr>
</tbody>
</table>

Source: U.S. Census Bureau 2014 American Community Survey
Median household income in urban counties (2010-2014)

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.

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.

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

Sources: U.S. Census Bureau 2000 Census; 2014 American Community Survey
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 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.
State of the Region: Labor Force, Employment, and Wages


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

Blue = Increase | Red = Decrease

Sources: 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 and exceed state and national rates.

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

Blue = Increase | Red = Decrease


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

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

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.
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 26). 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). In the United States, 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.
## Top Occupations by Number of Jobs: Wage Data in Comparison to the Rest of the United States (2015)

<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td>299,110 Total, All Occupations</td>
<td>$17.80</td>
<td>$8.34</td>
<td>$12.73</td>
<td>$23.23</td>
<td>$17.40</td>
<td>($5.43)</td>
<td>($4.67)</td>
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<tr>
<td>12,990 Retail Salespersons</td>
<td>$11.17</td>
<td>$8.20</td>
<td>$9.06</td>
<td>$11.77</td>
<td>$9.84</td>
<td>($0.60)</td>
<td>($0.78)</td>
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<tr>
<td>11,350 Office Clerks, General</td>
<td>$13.10</td>
<td>$8.52</td>
<td>$11.49</td>
<td>$15.33</td>
<td>$14.22</td>
<td>($2.23)</td>
<td>($2.73)</td>
<td></td>
</tr>
<tr>
<td>9,360 Cashiers</td>
<td>$9.01</td>
<td>$8.20</td>
<td>$8.72</td>
<td>$10.90</td>
<td>$9.29</td>
<td>($1.09)</td>
<td>($0.57)</td>
<td></td>
</tr>
<tr>
<td>9,290 Combined Food Preparation and Serving Workers, Inc</td>
<td>$8.63</td>
<td>$8.16</td>
<td>$8.61</td>
<td>$9.47</td>
<td>$9.09</td>
<td>($0.84)</td>
<td>($0.48)</td>
<td></td>
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<tr>
<td>8,740 Personal and Home Health Aides</td>
<td>$8.34</td>
<td>$8.19</td>
<td>$8.52</td>
<td>$11.00</td>
<td>$10.54</td>
<td>($2.66)</td>
<td>($2.02)</td>
<td></td>
</tr>
<tr>
<td>5,700 Waiters and Waitresses</td>
<td>$8.94</td>
<td>$8.17</td>
<td>$8.73</td>
<td>$11.07</td>
<td>$9.25</td>
<td>($2.13)</td>
<td>($0.52)</td>
<td></td>
</tr>
<tr>
<td>5,580 Registered Nurses</td>
<td>$31.88</td>
<td>$25.42</td>
<td>$30.97</td>
<td>$34.14</td>
<td>$32.45</td>
<td>($2.26)</td>
<td>($1.48)</td>
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</tr>
<tr>
<td>5,580 Janitors and Cleaners, Except Maids and Housekeeping</td>
<td>$10.13</td>
<td>$8.15</td>
<td>$9.59</td>
<td>$12.59</td>
<td>$11.27</td>
<td>($2.46)</td>
<td>($1.68)</td>
<td></td>
</tr>
<tr>
<td>5,250 Truck Drivers, Heavy and Tractor-Trailer</td>
<td>$17.95</td>
<td>$11.03</td>
<td>$17.18</td>
<td>$20.43</td>
<td>$19.36</td>
<td>($2.48)</td>
<td>($2.18)</td>
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</tr>
<tr>
<td>4,990 Secretaries, Except Legal, Medical, and Executive</td>
<td>$13.52</td>
<td>$8.84</td>
<td>$12.85</td>
<td>$16.92</td>
<td>$16.31</td>
<td>($3.40)</td>
<td>($3.46)</td>
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</tr>
<tr>
<td>4,980 Stock Clerks and Order Fillers</td>
<td>$10.50</td>
<td>$8.21</td>
<td>$9.29</td>
<td>$12.47</td>
<td>$11.17</td>
<td>($1.97)</td>
<td>($1.88)</td>
<td></td>
</tr>
<tr>
<td>3,650 General and Operations Managers</td>
<td>$51.21</td>
<td>$22.75</td>
<td>$38.93</td>
<td>$57.44</td>
<td>$46.99</td>
<td>($6.23)</td>
<td>($8.06)</td>
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</tr>
<tr>
<td>3,470 First-Line Supervisors/Managers of Retail Sales Work</td>
<td>$20.82</td>
<td>$10.91</td>
<td>$17.29</td>
<td>$20.63</td>
<td>$18.42</td>
<td>$0.19</td>
<td>($1.13)</td>
<td></td>
</tr>
<tr>
<td>3,080 Security Guards</td>
<td>$11.35</td>
<td>$8.19</td>
<td>$9.90</td>
<td>$13.68</td>
<td>$11.84</td>
<td>($2.33)</td>
<td>($1.94)</td>
<td></td>
</tr>
<tr>
<td>3,070 Bookkeeping, Accounting, and Auditing Clerks</td>
<td>$15.38</td>
<td>$10.07</td>
<td>$14.70</td>
<td>$18.74</td>
<td>$17.91</td>
<td>($3.36)</td>
<td>($3.21)</td>
<td></td>
</tr>
<tr>
<td>2,880 Cooks, Restaurant</td>
<td>$9.54</td>
<td>$8.19</td>
<td>$9.10</td>
<td>$11.74</td>
<td>$11.11</td>
<td>($2.20)</td>
<td>($2.01)</td>
<td></td>
</tr>
<tr>
<td>2,880 Maintenance and Repair Workers, General</td>
<td>$14.17</td>
<td>$9.26</td>
<td>$13.43</td>
<td>$18.73</td>
<td>$17.61</td>
<td>($4.56)</td>
<td>($4.18)</td>
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</tr>
<tr>
<td>2,820 First-Line Supervisors of Office and Administrative Support</td>
<td>$24.81</td>
<td>$15.00</td>
<td>$22.68</td>
<td>$27.01</td>
<td>$25.30</td>
<td>($2.20)</td>
<td>($2.62)</td>
<td></td>
</tr>
<tr>
<td>2,530 Arts, Design, Entertainment, Sports, and Media Occupations</td>
<td>$20.27</td>
<td>$8.82</td>
<td>$16.80</td>
<td>$27.39</td>
<td>$22.19</td>
<td>($7.12)</td>
<td>($5.39)</td>
<td></td>
</tr>
<tr>
<td>2,190 Nursing Assistants</td>
<td>$10.43</td>
<td>$8.19</td>
<td>$9.41</td>
<td>$12.89</td>
<td>$12.36</td>
<td>($2.46)</td>
<td>($2.95)</td>
<td></td>
</tr>
</tbody>
</table>

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

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

State of the Region: Housing and Transportation

Household Occupancy Status (2014)

Households with Housing Costs Over 30% (2014)

<table>
<thead>
<tr>
<th></th>
<th>El Paso</th>
<th>Doña Ana</th>
<th>Otero</th>
<th>Texas</th>
<th>New Mexico</th>
<th>United States</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owner Occupied Under 35k Costs Over 30%</td>
<td>16.9%</td>
<td>16.4%</td>
<td>16.1%</td>
<td>12.8%</td>
<td>15.2%</td>
<td>13.3%</td>
</tr>
<tr>
<td>Owner Occupied Over 35k Costs Over 30%</td>
<td>7.5%</td>
<td>4.4%</td>
<td>6.0%</td>
<td>10.2%</td>
<td>9.0%</td>
<td>14.1%</td>
</tr>
<tr>
<td>Renter Occupied Under 35k Costs Over 30%</td>
<td>40.1%</td>
<td>46.7%</td>
<td>32.2%</td>
<td>37.9%</td>
<td>40.4%</td>
<td>38.4%</td>
</tr>
<tr>
<td>Renter Occupied Over 35k Costs Over 30%</td>
<td>6.3%</td>
<td>4.4%</td>
<td>5.3%</td>
<td>7.3%</td>
<td>5.1%</td>
<td>9.9%</td>
</tr>
<tr>
<td>Households without “Affordable Rate”</td>
<td>70.8%</td>
<td>71.9%</td>
<td>59.6%</td>
<td>68.2%</td>
<td>69.7%</td>
<td>75.7%</td>
</tr>
<tr>
<td>Households with “Affordable Rate”</td>
<td>29.2%</td>
<td>28.1%</td>
<td>40.4%</td>
<td>31.8%</td>
<td>30.3%</td>
<td>24.3%</td>
</tr>
<tr>
<td>Average Monthly Owner-Occupied Housing Costs</td>
<td>$800.00</td>
<td>$790.00</td>
<td>$593.00</td>
<td>$1,028.00</td>
<td>$801.00</td>
<td>$1,108.00</td>
</tr>
<tr>
<td>Average Monthly Renter-Occupied Housing Costs</td>
<td>$741.00</td>
<td>$705.00</td>
<td>$775.00</td>
<td>$870.00</td>
<td>$774.00</td>
<td>$920.00</td>
</tr>
</tbody>
</table>

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, and 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.
Section II
Summary Background

Household Occupancy Status (2014)

Households with Housing Costs Over 30% (2014)

| Source: U.S. Census Bureau 2014 American Community Survey |

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 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.
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 El Paso, Doña Ana, and Otero Counties get to and from work faster than the state and national average.
### Population Working at Home in WTEDD Rural Counties

<table>
<thead>
<tr>
<th></th>
<th>Brewster</th>
<th>Culberson</th>
<th>Hudspeth</th>
<th>Jeff Davis</th>
<th>Presidio</th>
<th>TX</th>
<th>N.M.</th>
<th>U.S.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Worked at home (M)</td>
<td>4.7%</td>
<td>1.3%</td>
<td>6.9%</td>
<td>21.1%</td>
<td>9.1%</td>
<td>3.9%</td>
<td>4.4%</td>
<td>4.2%</td>
</tr>
<tr>
<td>Worked at home (F)</td>
<td>6.5%</td>
<td>2.2%</td>
<td>6.5%</td>
<td>4.8%</td>
<td>8.2%</td>
<td>4.3%</td>
<td>5.3%</td>
<td>4.5%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>Brewster</th>
<th>Culberson</th>
<th>Hudspeth</th>
<th>Jeff Davis</th>
<th>Presidio</th>
<th>TX</th>
<th>N.M.</th>
<th>U.S.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Worked In County (M)</td>
<td>88.7%</td>
<td>63.0%</td>
<td>67.8%</td>
<td>76.6%</td>
<td>76.0%</td>
<td>75.0%</td>
<td>82.7%</td>
<td>69.9%</td>
</tr>
<tr>
<td>Worked Outside County (M)</td>
<td>11.2%</td>
<td>34.4%</td>
<td>32.2%</td>
<td>23.4%</td>
<td>17.6%</td>
<td>23.5%</td>
<td>13.2%</td>
<td>25.6%</td>
</tr>
<tr>
<td>Worked Outside of State (M)</td>
<td>0.1%</td>
<td>1.5%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>6.4%</td>
<td>1.5%</td>
<td>4.0%</td>
<td>4.5%</td>
</tr>
<tr>
<td>Worked In County (F)</td>
<td>93.2%</td>
<td>93.7%</td>
<td>76.6%</td>
<td>71.0%</td>
<td>92.5%</td>
<td>80.4%</td>
<td>87.0%</td>
<td>75.3%</td>
</tr>
<tr>
<td>Worked Outside County (F)</td>
<td>6.8%</td>
<td>6.3%</td>
<td>23.4%</td>
<td>29.0%</td>
<td>6.8%</td>
<td>19.1%</td>
<td>10.6%</td>
<td>21.7%</td>
</tr>
<tr>
<td>Worked Outside of State (F)</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.7%</td>
<td>0.5%</td>
<td>2.3%</td>
<td>3.0%</td>
</tr>
</tbody>
</table>

### Mean Travel Time to Work in WTEDD Rural Counties

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

Source: U.S. Census Bureau 2014 American Community Survey

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.
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. For these reasons, investing in public health is a key component to economic development in the WTEDD.

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 is also limited by long travel distances to and between health centers.

There is also a need for preventative health programs across the rural WTEDD counties. These programs include mobile clinical health services, tobacco cessation programs, investments in physical activity facilities and programs, and mental health services, which have a limited presence in the region.
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.

Interstate and State Highways in the WTEDD Region

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 country 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

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 Pacifico Transportation, Ltd., which has announced several investments that would rehabilitate the South Orient Line as early as 2018.
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.

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

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

Source: Texas Center for Border Economics and Enterprise
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 increased steadily 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, projected border inefficiencies costs on the regional economy will reach $54 billion by the year 2035.

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.

Source: Texas Department of Transportation; New Mexico Department of Transportation

The ELP domestic traffic decline from 2002 to 2015 is consistent with a permanent decline in U.S. domestic airline demand. The number of passengers serviced at ELP has remained steady at close to 1.4 million from 2002 to 2015. Restrictions ending in 2014 from the Wright Amendment Reform Act of 2006 reduced the availability of non-stop destination flights in ELP. In response, the Borderplex Alliance and the City of El Paso have proposed ways to increase non-stop flights.

The ELP passenger load factor has increased rapidly from 56.12 in 2002 to 78.27 in 2015. Load factors measures the capacity utilization of airlines and is used to assess how efficiently a transport providers fills seats and generates fare revenue. According to the International Air Transport Association (IATA), the worldwide load factor for the passenger airline industry during 2015 was 79.7%.

Across the border, flights in the Abraham González International Airport (CJS) in Ciudad Juárez are almost entirely domestic. Close to 97% of all flights are passenger flights. Data from the Secretaria de Comunicaciones y Transportes, Aeronautica Civil indicates that the number of flights in CJS have increased from over 52,000 in 2006 to over 68,000 in 2015.

### Number of Flights in International Airports, All Carriers (2002-2015)

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>El Paso International (ELP)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Domestic Origin</td>
<td>23,713</td>
<td>22,395</td>
<td>23,642</td>
<td>23,893</td>
<td>23,348</td>
<td>23,137</td>
<td>22,678</td>
<td>22,261</td>
<td>21,888</td>
<td>21,542</td>
<td>20,621</td>
<td>19,813</td>
<td>18,261</td>
<td>16,289</td>
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<td>Domestic Destination</td>
<td>23,752</td>
<td>22,476</td>
<td>23,674</td>
<td>12,915</td>
<td>23,382</td>
<td>23,152</td>
<td>22,705</td>
<td>22,283</td>
<td>21,908</td>
<td>21,576</td>
<td>20,640</td>
<td>19,836</td>
<td>18,279</td>
<td>16,341</td>
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<tr>
<td><strong>Domestic Total</strong></td>
<td>47,465</td>
<td>44,871</td>
<td>47,316</td>
<td>36,808</td>
<td>46,730</td>
<td>45,383</td>
<td>44,544</td>
<td>43,796</td>
<td>43,118</td>
<td>41,261</td>
<td>39,649</td>
<td>36,540</td>
<td>32,630</td>
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<tr>
<td>International Origin</td>
<td>378</td>
<td>541</td>
<td>318</td>
<td>352</td>
<td>27</td>
<td>1</td>
<td>2</td>
<td>4</td>
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<td>3</td>
<td>0</td>
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<tr>
<td>International Destination</td>
<td>376</td>
<td>541</td>
<td>321</td>
<td>352</td>
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<td>5</td>
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<td>1</td>
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<tr>
<td><strong>International Total</strong></td>
<td>754</td>
<td>1,082</td>
<td>639</td>
<td>704</td>
<td>53</td>
<td>2</td>
<td>7</td>
<td>6</td>
<td>9</td>
<td>3</td>
<td>3</td>
<td>5</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>Passenger Load Factor ELP Total</td>
<td>56.12</td>
<td>61.52</td>
<td>64.81</td>
<td>66.02</td>
<td>69.49</td>
<td>73.13</td>
<td>71.84</td>
<td>70.54</td>
<td>72.51</td>
<td>72.52</td>
<td>73.98</td>
<td>72.60</td>
<td>78.27</td>
<td>80.48</td>
</tr>
<tr>
<td>Passenger Load Factor (All Airports in U.S.)</td>
<td>72.61</td>
<td>73.59</td>
<td>75.89</td>
<td>77.82</td>
<td>78.88</td>
<td>79.53</td>
<td>78.69</td>
<td>79.72</td>
<td>81.90</td>
<td>81.60</td>
<td>82.53</td>
<td>82.77</td>
<td>82.69</td>
<td>82.68</td>
</tr>
<tr>
<td><strong>Abraham González International Airport (CJS)</strong></td>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Domestic Total</td>
<td>52,399</td>
<td>61,202</td>
<td>85,677</td>
<td>55,537</td>
<td>44,841</td>
<td>50,850</td>
<td>55,530</td>
<td>52,765</td>
<td>61,475</td>
<td>68,540</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>International Total</td>
<td>143</td>
<td>147</td>
<td>180</td>
<td>132</td>
<td>94</td>
<td>892</td>
<td>95</td>
<td>131</td>
<td>99</td>
<td>91</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Bureau of Transportation Statistics TranStats; MX Secretaria de Comunicaciones y Transportes Aeronautica Civil - Estadistica Operacional de Auropuertos
State of the Region: Military and Law Enforcement

Several studies have calculated the economic impact of military bases in the region. According to a 2015 study by Border Research, which also included Lincoln, Sierra, and Socorro counties in New Mexico, military employment and spending in Fort Bliss, Holloman Air Force Base, and White Sands Missile Range together account for 96,250 in regional jobs, $6.1 billion in wages and salaries, and $13.6 billion in industry output. The estimates represent 17.9% of all regional jobs, 24.9% of earned income, and 18.9% of total industry output. About 1 in 5 jobs in the region are associated with one of the three military installations.

The UTEP Institute for Policy and Economic Development published a 2013 report on the economic impact of Fort Bliss and the William Beaumont Army Medical Center (WBAMC) in El Paso County. According to this study, Fort Bliss and the WBAMC combined account for 61,957 jobs, close to $6 billion in economic output, and over $4.1 billion in employee compensation. Construction between 2011 and 2013 alone had an impact of $112 million, 833 jobs, and $33 million in compensation.

The Texas Comptroller estimated that the total contribution of Fort Bliss to the Texas economy in 2015 is over $24.1 billion in economic output and 135,610 jobs.

### U.S. CBP in the WTEDD

There is a significant presence of U.S. Customs and Border Protection agents in the WTEDD region. Border Patrol staffing in the El Paso Sector has increased by 220% (1328 agents) between 2000 and 2015. The El Paso Border Patrol Sector covers El Paso and Hudspeth Counties and all of New Mexico.

Staffing in the Big Bend (Marfa) Border Patrol Sector increased by 280% (353 agents) between 2000 and 2015. The Big Bend (Marfa) Border Patrol Sector covers the Big Bend region as well as far as the Texas Panhandle and the western half of Oklahoma.
State of the Region: Natural Resources

National Parks in the Region

The WTEDD region contains seven 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

**Parks**
- Franklin Mountains State Park
- Hueco Tanks State Park and Historic Site
- Indian Lodge
- Leasburg Dam State Park
- Mesilla Valley Bosque Stat
- Organ Mountains – Desert Peaks
Section II
Summary Background

Most rural communities across the United States have shifted away from more traditional economic base activities like agriculture, mining, and manufacturing toward service oriented industries related to attracting seasonal residents and tourists. The travel industry makes a substantial contribution to local government tax revenue across the WTEDD Texas counties. Local tax revenue is collected by counties and municipalities, as levied on applicable travel-related businesses and includes the transient lodging and local sales taxes.

The economic impact of tourism in most WTEDD Texas Counties has increased consistently from 2010 to 2015. The economic impact of national parks as tourism assets within the WTEDD region increased steadily from 2012 to 2015.

### Visitor Spending Effects of WTEDD National Parks

<table>
<thead>
<tr>
<th>National Park</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Big Bend National Park</td>
<td>$24.2 M</td>
<td>$26.8 M</td>
<td>$27.2 M</td>
<td>$33.4 M</td>
</tr>
<tr>
<td>Jobs to Local Gateway Economies</td>
<td>312</td>
<td>353</td>
<td>410</td>
<td>503</td>
</tr>
<tr>
<td>Carlsbad Caverns National Park</td>
<td>$22.6 M</td>
<td>$23.6 M</td>
<td>$24.5 M</td>
<td>$28.1 M</td>
</tr>
<tr>
<td>Jobs to Local Gateway Economies</td>
<td>296</td>
<td>306</td>
<td>368</td>
<td>419</td>
</tr>
<tr>
<td>Chihuahua National Memorial</td>
<td>$5.6 M</td>
<td>$6.7 M</td>
<td>$6.1 M</td>
<td>$7.0 M</td>
</tr>
<tr>
<td>Jobs to Local Gateway Economies</td>
<td>79</td>
<td>94</td>
<td>114</td>
<td></td>
</tr>
<tr>
<td>Fort Davis National Historic Site</td>
<td>$2.1 M</td>
<td>$2.4 M</td>
<td>$2.8 M</td>
<td>$3.2 M</td>
</tr>
<tr>
<td>Jobs to Local Gateway Economies</td>
<td>27</td>
<td>31</td>
<td>42</td>
<td>49</td>
</tr>
<tr>
<td>Guadalupe Mountains National Park</td>
<td>$9.1 M</td>
<td>$8.5 M</td>
<td>$9.9 M</td>
<td>$10.3 M</td>
</tr>
<tr>
<td>Jobs to Local Gateway Economies</td>
<td>121</td>
<td>111</td>
<td>152</td>
<td>157</td>
</tr>
<tr>
<td>Rio Grande Wild &amp; Scenic River</td>
<td>$69.1 K</td>
<td>$689.1 K</td>
<td>$311.2 K</td>
<td>$196.9 K</td>
</tr>
<tr>
<td>Jobs to Local Gateway Economies</td>
<td>1</td>
<td>18</td>
<td>6</td>
<td>4</td>
</tr>
<tr>
<td>White Sands National Monument</td>
<td>$21.9 M</td>
<td>$24.5 M</td>
<td>$25.6 M</td>
<td>$25.7 M</td>
</tr>
<tr>
<td>Jobs to Local Gateway Economies</td>
<td>276</td>
<td>307</td>
<td>386</td>
<td>387</td>
</tr>
</tbody>
</table>

Source: U.S. National Park Service; U.S. Geological Survey

### Travel Share of Total County Employment (2015)

<table>
<thead>
<tr>
<th>County</th>
<th>Total Travel</th>
<th>Percent</th>
<th>Total</th>
<th>Travel</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brewster</td>
<td>224</td>
<td>33.5</td>
<td>5830</td>
<td>1400</td>
<td>24.0%</td>
</tr>
<tr>
<td>Culberson</td>
<td>72</td>
<td>4.9</td>
<td>1950</td>
<td>160</td>
<td>8.2%</td>
</tr>
<tr>
<td>Hudspeth</td>
<td>101</td>
<td>0.4</td>
<td>2300</td>
<td>10</td>
<td>0.4%</td>
</tr>
<tr>
<td>Jeff Davis</td>
<td>39</td>
<td>3.9</td>
<td>1480</td>
<td>110</td>
<td>7.4%</td>
</tr>
<tr>
<td>Presidio</td>
<td>139</td>
<td>1.9</td>
<td>3130</td>
<td>60</td>
<td>1.9%</td>
</tr>
<tr>
<td>El Paso</td>
<td>19494</td>
<td>410.8</td>
<td>423050</td>
<td>13540</td>
<td>3.2%</td>
</tr>
</tbody>
</table>

Source: Dean Runyan Associates – Texas Tourism, Office of the Governor, Economic Development and Tourism

### Direct County Total Travel Spending, 1995-2015 (in thousands)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Brewster</td>
<td>30.4</td>
<td>37.4</td>
<td>43.7</td>
<td>50.3</td>
<td>60.3</td>
<td>66.9</td>
<td>4.0%</td>
</tr>
<tr>
<td>Culberson</td>
<td>13.4</td>
<td>18.7</td>
<td>28.7</td>
<td>34.2</td>
<td>38.9</td>
<td>31.9</td>
<td>4.4%</td>
</tr>
<tr>
<td>Hudspeth</td>
<td>2.4</td>
<td>2.9</td>
<td>4.5</td>
<td>5.5</td>
<td>5.8</td>
<td>4.5</td>
<td>3.2%</td>
</tr>
<tr>
<td>Jeff Davis</td>
<td>3.8</td>
<td>5.2</td>
<td>6.4</td>
<td>8.5</td>
<td>9.2</td>
<td>8.3</td>
<td>3.5%</td>
</tr>
<tr>
<td>Presidio</td>
<td>2.7</td>
<td>4.2</td>
<td>6.8</td>
<td>8.2</td>
<td>10.1</td>
<td>9.9</td>
<td>6.6%</td>
</tr>
<tr>
<td>El Paso</td>
<td>855</td>
<td>1030.0</td>
<td>1297.0</td>
<td>1519.0</td>
<td>1685</td>
<td>1627.0</td>
<td>3.3%</td>
</tr>
</tbody>
</table>

### Local and State Tax Travel Impact Receipts by County

<table>
<thead>
<tr>
<th>County</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brewster Local</td>
<td>$0.8 M</td>
<td>$0.8 M</td>
<td>$0.9 M</td>
<td>$1.0 M</td>
<td>$1.1 M</td>
<td>$1.3 M</td>
</tr>
<tr>
<td>Brewster State</td>
<td>$1.7 M</td>
<td>$1.7 M</td>
<td>$1.8 M</td>
<td>$2.0 M</td>
<td>$2.1 M</td>
<td>$2.1 M</td>
</tr>
<tr>
<td>Culberson Local</td>
<td>$320 K</td>
<td>$310 K</td>
<td>$320 K</td>
<td>$360 K</td>
<td>$370 K</td>
<td>$390 K</td>
</tr>
<tr>
<td>Culberson State</td>
<td>$2.1 M</td>
<td>$2.0 M</td>
<td>$2.0 M</td>
<td>$2.1 M</td>
<td>$2.1 M</td>
<td>$2.1 M</td>
</tr>
<tr>
<td>Hudspeth Local</td>
<td>Under $5K</td>
<td>Under $5K</td>
<td>Under $5K</td>
<td>Under $5K</td>
<td>Under $5K</td>
<td>Under $5K</td>
</tr>
<tr>
<td>Hudspeth State</td>
<td>$340 K</td>
<td>$310 K</td>
<td>$300 K</td>
<td>$310 K</td>
<td>$320 K</td>
<td>$320 K</td>
</tr>
<tr>
<td>Jeff Davis Local</td>
<td>Under $5K</td>
<td>Under $5K</td>
<td>Under $5K</td>
<td>Under $5K</td>
<td>Under $5K</td>
<td>Under $5K</td>
</tr>
<tr>
<td>Jeff Davis State</td>
<td>$430 K</td>
<td>$380 K</td>
<td>$400 K</td>
<td>$420 K</td>
<td>$440 K</td>
<td>$440 K</td>
</tr>
<tr>
<td>Presidio Local</td>
<td>$180 K</td>
<td>$190 K</td>
<td>$220 K</td>
<td>$240 K</td>
<td>$250 K</td>
<td>$260 K</td>
</tr>
<tr>
<td>Presidio State</td>
<td>$390 K</td>
<td>$390 K</td>
<td>$430 K</td>
<td>$460 K</td>
<td>$460 K</td>
<td>$480 K</td>
</tr>
<tr>
<td>El Paso Local</td>
<td>$22.6 M</td>
<td>$23.9 M</td>
<td>$24.1 M</td>
<td>$23.8 M</td>
<td>$25.3 M</td>
<td>$26.6 M</td>
</tr>
<tr>
<td>El Paso State</td>
<td>$65.4 M</td>
<td>$65.8 M</td>
<td>$66.1 M</td>
<td>$66.9 M</td>
<td>$69.4 M</td>
<td>$71.2 M</td>
</tr>
</tbody>
</table>

Source: Dean Runyan Associates – Texas Tourism, Office of the Governor, Economic Development and Tourism

Most rural communities across the United States have shifted away from more traditional economic base activities like agriculture, mining, and manufacturing toward service oriented industries related to attracting seasonal residents and tourists.

The travel industry makes a substantial contribution to local government tax revenue across the WTEDD Texas counties. Local tax revenue is collected by counties and municipalities, as levied on applicable travel-related businesses and includes the transient lodging and local sales taxes.

The economic impact of tourism in most WTEDD Texas Counties has increased consistently from 2010 to 2015. The economic impact of national parks as tourism assets within the WTEDD region increased steadily from 2012 to 2015.
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 an effective 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 private employment and private job creation trends at the county level, metropolitan statistical area, or even a custom region.

Across the WTEDD region, the percentage of people employed by the government ranges from 15-23%. Government employment in Otero County is significantly higher at 37.1%. Analyses of location quotients (LQ), which are ratios that allow an area’s distribution of employment by industry to be compared to a reference area, show a heavy concentration of government-related employment across the WTEDD region compared to Texas, New Mexico, and the nation. This is largely due to the significant military, border patrol, and homeland security presence in the region.

In order to increase economic resiliency, the WTEDD region needs to emphasize private job creation. 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)

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

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

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

Source: U.S. Department of Commerce Bureau of Economic Analysis
Summary Background

Location Quotients for Government-Related Sectors in WTEDD Urban Counties Compared to Texas and New Mexico (2015)

Location Quotients for Government-Related Sectors in WTEDD Rural Counties Compared to Texas (2015)

Location Quotients for Government-Related Sectors in WTEDD Urban Counties Compared to the U.S. (2015)

Location Quotients for Government-Related Sectors in WTEDD Urban Counties Compared to the U.S. (2015)

Source: U.S. Department of Commerce Bureau of Economic Analysis
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.
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.
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.
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.
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.
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.
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.
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.
SECTION III: WTEDD SWOT Analysis

WTEDD SWOT Analysis for Urban Counties

STRENGTHS

- Ample availability of land at affordable prices
- Over 300 days of sunlight per year
- Established regional economic development collaborations
- 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 and the technical expertise that comes with it
- Significant economic impact from military bases
- Bicultural and bilingual workforce
- Low cost of living
- Workforce / education pipelines

WEAKNESSES

- Negative perceptions of low quality / high crime
- Community silos / need for infrastructure development outside of El Paso and Las Cruces
- Fragmented economic development and strategic plans throughout the region
- Losses due to inefficiency in border crossings
- Airports have limited Direct Air Service to key markets, resulting in losses for business and tourism
- Lack of industry diversification
- Underdeveloped supply chain
- Limited financing options for businesses and 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
- High dependence on federal and state jobs
### OPPORTUNITIES

- Regionalized entrepreneurial ecosystem
- Strengthen innovation and technology commercialization 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
- Develop supply chain related to maquiladoras
- Leverage local historical, cultural, and natural assets to promote tourism, including ecotourism (e.g., Paso del Norte heritage theme, North American heritage theme, Spaceport tourism)
- Leverage new oil / gas production in Western Permian Basin
- Pursue new federal and state economic development funding programs
- Redevelop brownfields and vacant industrial space
- Create outreach programs for K-12 that align with regional economic and workforce development goals
- Become a world-leader in alternative energy production
- Increase awareness of the region’s strong assets, including trade and specific educational programs

### THREATS

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

- Sul Ross University / access to higher education
- Vibrant tourism industry, which includes:
  - McDonald Observatory
  - Marfa and Alpine art scene / wedding destination
  - Biking (FM 170)
  - Birding
  - Dark skies initiative
- Home to the Big Bend, 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 transportation (Amtrak)
- Average or higher-than average school districts 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 are available
- Limited public transportation
- 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 early stage ventures
- Non-assimilated border patrol / homeland security presence
- Need for technical school and skilled tradesmen matching regional needs
- HAZMAT needed for Presidio/Ojinaga bridge
- Tourism slumps outside of major events and seasonal visits
- Early-learning programs needed
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
- Enhancement of rural entrepreneurship programs

**THREATS**

- Flooding / highway blockage due to natural hazards
- Wildfires / HAZMAT in key transportation routes
- Need duplication/redundancy of utility 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
- 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 area for businesses creation and relocation 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 ecosystem 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 ten 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 (EPCC) Small Business Development Center and Contract Opportunity Center, 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, including Leveraging Presidio/Ojinaga as a Competitive Gateway for Trade
3. Become Known for Quality through Workforce Development and Education Programs Tailored to Industry Needs
4. Increase Investments in Communication Technology, Energy Production, and Infrastructure
5. Leverage the Significant Military and Law Enforcement Presence in the Region
6. Alleviate Issues in Housing and Health Care Services
7. Strengthen the Region’s Position as a Tourist and Retail Destination
8. Spur Innovation and Entrepreneurialism
9. Promote Economic Resiliency
10. Promote the Rural Lifestyle
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:
   - Engaging role models and increase regional exposure of the “cool things happening,” as described in [Innovation Frontera](#)
   - Developing and market [Network Co-Working Spaces](#) at and for businesses and entrepreneurs on both sides of the border
   - Coordinating events hosting entrepreneurs and venture capitalists from Mexico and Latin America, such as the [Paso del Norte Venture Capital Competition](#)
   - Coordinating international trade missions showcasing the Borderplex region, beyond state and national trade missions
   - Recruiting, retaining, and supporting the expansion of existing businesses venturing into international trade and business services
   - Creating support ecosystem for start-ups and micro-businesses on both sides of the border, including technical assistance and technology commercialization programs

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
   - Advocating 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](#))
   - Developing a plan to measure, attract, and increase business to and from Latin America
   - Implementing Lean Six Sigma for border crossings
   - Developing foreign-trade zones in defined areas for urban and rural counties
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](https://www.pmdistrict.com/), 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](https://www.borderplex.org/about-us/)
- 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
- Identify potential synergies between rural and urban communities

2.4 **Create a Regional Data and Economic News Repository**, which includes:
- Adopting guidelines and data tools from the [International Economic Development Council (IEDC)](https://www.iedc.org/)
- Creating and maintaining regional databases and analytical tools
- Creating an asset map on research capabilities in the region to support industry
- 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 **Create intergovernmental strategies that create educational and business opportunities**, including:
- [UTEP Aerospace / El Paso County Airport initiative](https://www.utepeag.com/)
- [Tornillo-Guadalupe Port of Entry](https://www.tornilloport.com/) development and infrastructure expansion

2.6 **Multiple other mid-term and short-term strategies**, which include but are not limited to:
- Create geospacial models of key economic factors affecting the region (e.g., [Helix Solutions](https://www.helixsolutions.com/), [Secure Origins](https://www.secureorigins.com/))
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.
   - Increase linkage between industry and academia
   - Seek outside funding to support the education and training needs of the community outside of state and federal agencies
   - Fund K-12 initiatives focusing on STEM, modernizing facilities, and college attainment initiatives such as the CREEED 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
   - Support EPCC in its goal to stimulate entrepreneurial education at colleges, community, and K-12 courses through accelerators, fab labs, incubators, and co-working spaces
   - Adopt regional education support systems in line with the Texas 60x30TX Strategic Plan, and 60x30EP Goals as supported by CREEED
   - 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 Communication Technology, Energy Production, and 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
- Support solar use projects such as Community Solar Pilot Program
- 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
- Leverage the Las Cruces Airport for freight transportation as part of the New Mexico 2040 Freight Plan
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
- Expand military support services to rural areas where appropriate
- 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 U.S. 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 Defense Economic Adjustment Assistance Grant Program (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 2016-2020 City of Las Cruces Five Year Consolidated Plan.
- 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 the HUD Rental Assistance Demonstration program (e.g., 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 and the development of tourism apps, such as Just Ahead’s Big Bend National Park Audio Travel Guide

7.5 Create a Mission Trail Master Plan, as proposed by El Paso County:
   - Recognize Ysleta, Socorro, and San Elizario historic sites
   - Support a National Historic Designation
   - Pursue UNESCO designation as a World Heritage site
   - Attract retail and business services that complement the tourism industry

7.6 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 jurisdictions
- The Threat and Hazard Identification and Risk Assessment (THIRA) plans coordinated by the Rio Grande Council of Governments

9.3 Develop Strategies to Increase Financial Inclusion of Micro/Small Merchants and Individuals
- Account for "disconnected" individuals and businesses when measuring community economic power
- Implement Financial Inclusion programs such as the MasterCard Program
- Expand digital financial services where access is limited by attracting service companies such as Digital Wave

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

9.7 Implement the El Paso County PACE Program
RECOMMENDATION 10: Promote the Rural Lifestyle

Key Actions

10.1 **Create a Rural Business Retention, Attraction, and Expansion Strategy** with support from the Texas Governor’s Office Economic Development & Tourism Department
   - Perform an annual quality-of-operations survey for businesses across the rural regions

10.2 **Create a Rural Resident Retention, Attraction, and Expansion Strategy**
   - Perform an annual quality-of-life survey for residents across the rural regions
   - Increase economic diversity in the rural WTEDD counties

10.3 **Create Rural Jurisdictional Profiles Emphasizing the Benefits of the Rural Lifestyle**
   - Create a USDA FindYourTown Profile for every municipality
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, 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 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 measures on WTEDD initiatives will also be tracked, including:

- Dollar amount of funding granted by the U.S. Economic Development Administration and other federal, state, and private agencies
- Number of jobs created by WTEDD initiatives
- Number of grant applications in which the WTEDD provided technical assistance
- Number of agencies that the WTEDD provided technical assistance
- Number of agencies that become engaged in the CEDS process, including annual revisions
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 (Specific, Measurable, Attainable, Relevant, Time-bound) 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.
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.

A public comment period soliciting and addressing public comments occurred between November 21 and December 21, 2016. During this period, drafts of the 2016-2020 CEDS were submitted for review to public and private economic development stakeholders across the WTEDD region, including Doña Ana and Otero Counties in New Mexico. Stakeholders were asked to share the 2016-2020 CEDS across their communication networks. Public comments were reviewed during Strategy Committee meetings as part of the development of the 2016-2020 CEDS.
Public comments were 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 website using the following URL: http://www.riocog.org/REGSVCS/rs.htm#econdev.htm.

Comments to be considered for annual revision may be sent by email to omarm@riocog.org, by fax at 915-532-9385, or by mail addressed to:

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