



Economic Development

The Central Texas countryside is characterized by two major geographic areas. On its eastern side, rolling prairies extend from Hillsboro south to Brenham. Traveling westward, slopes and cedars appear more frequently on the upper rim of the Texas Hill Country. This diverse landscape provides an array of resources that fuel regional industries and foster economic growth.

Mining is a traditional pillar of the regional economy. Enterprises such as clay, ceramic and refractory mining have remained robust, while value-added activities such as

wholesaling and transportation have evolved to support them.

Since the 1940s, the military has played a large role in the Central Texas economy. Fort Hood, in the Killeen area, has trained and deployed soldiers for military conflicts since World War II. The base's presence supports local communities and businesses while bringing in jobs from outside the state.

Manufacturing plays a pivotal role in the area's economy. Area businesses manufacture a broad range of products including lime, plastics, desserts and soft drinks. Blue Bell Ice Cream contributes to the region's manufacturing strength, and the Mars Snackfood operation in Waco makes products consumed throughout the world.

Exhibit 2 shows employment estimates for the Central Texas region, including the

(text continued on Page 7)

Manufacturing plays a pivotal role in the area's economy. Area businesses manufacture a broad range of products including lime, plastics, desserts and soft drinks.



Opening day for Scott & White Canyon Creek Pharmacy in Temple.

PHOTO: Scott & White



Zodiac Enterprises

Since January 2009, the city of Caldwell, a small community 25 miles southwest of Bryan-College Station, has been the Texas home of metal processor Zodiac Enterprises. The Caldwell operation converts aluminum oxide into aluminum sulfate for use by the petrochemical industry. The process effectively recycles metals for industrial reuse and produces no waste.¹

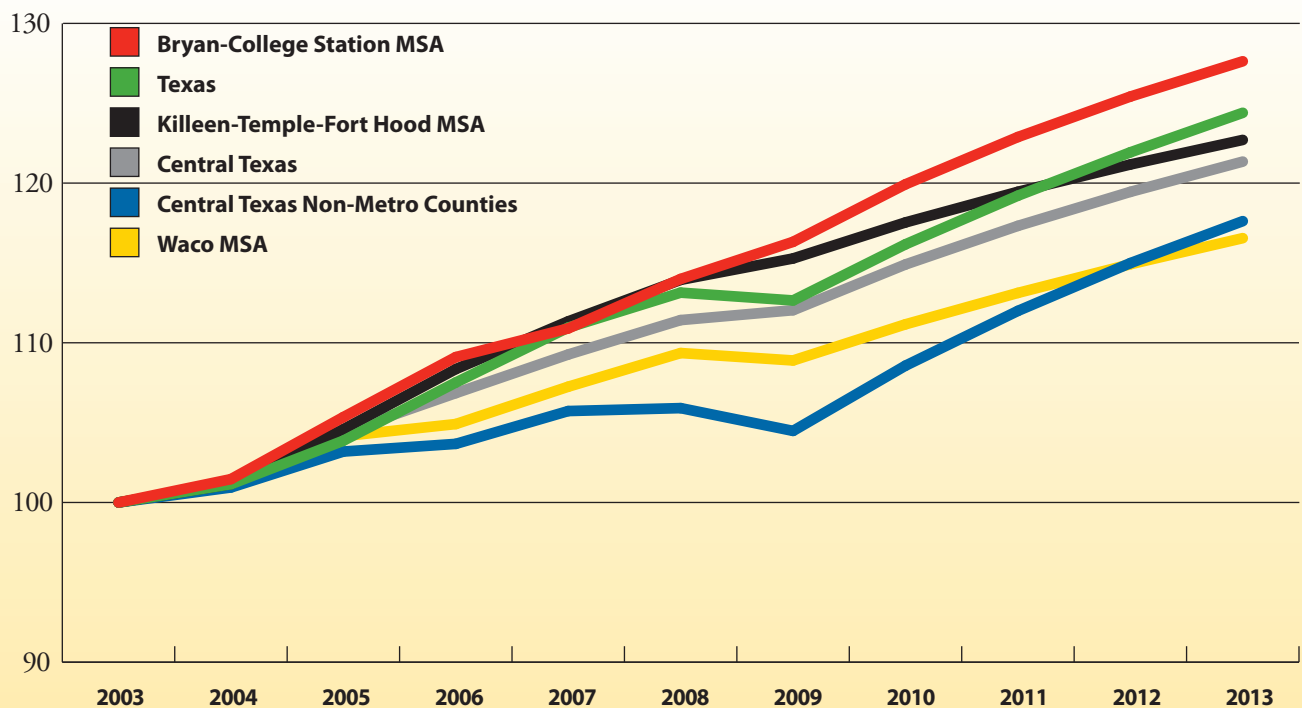
The California-based company cites Caldwell’s proximity to major industrial cities, highways, railroads and Gulf Coast refineries as reasons for the location. Instead of purchasing an existing off-line plant, Zodiac developed a \$3 million 22-acre plot for its new facility, which will employ 22 local workers.²

To accommodate Zodiac’s operational needs, the company helped the city obtain state grants for infrastructure development. As a result, Caldwell spent only \$275,000 on a new industrial boulevard and natural gas line.

Zodiac contributes more than just jobs to the local economy, it also attracts support services. Houston-based Inspectorate Corp. provides quality control monitoring at Zodiac’s plant, and as the metal processor begins its next phases of production, it will draw more hydrometallurgical support.³

Exhibit 2

Central Texas Region Employment Indices, 2003-2013

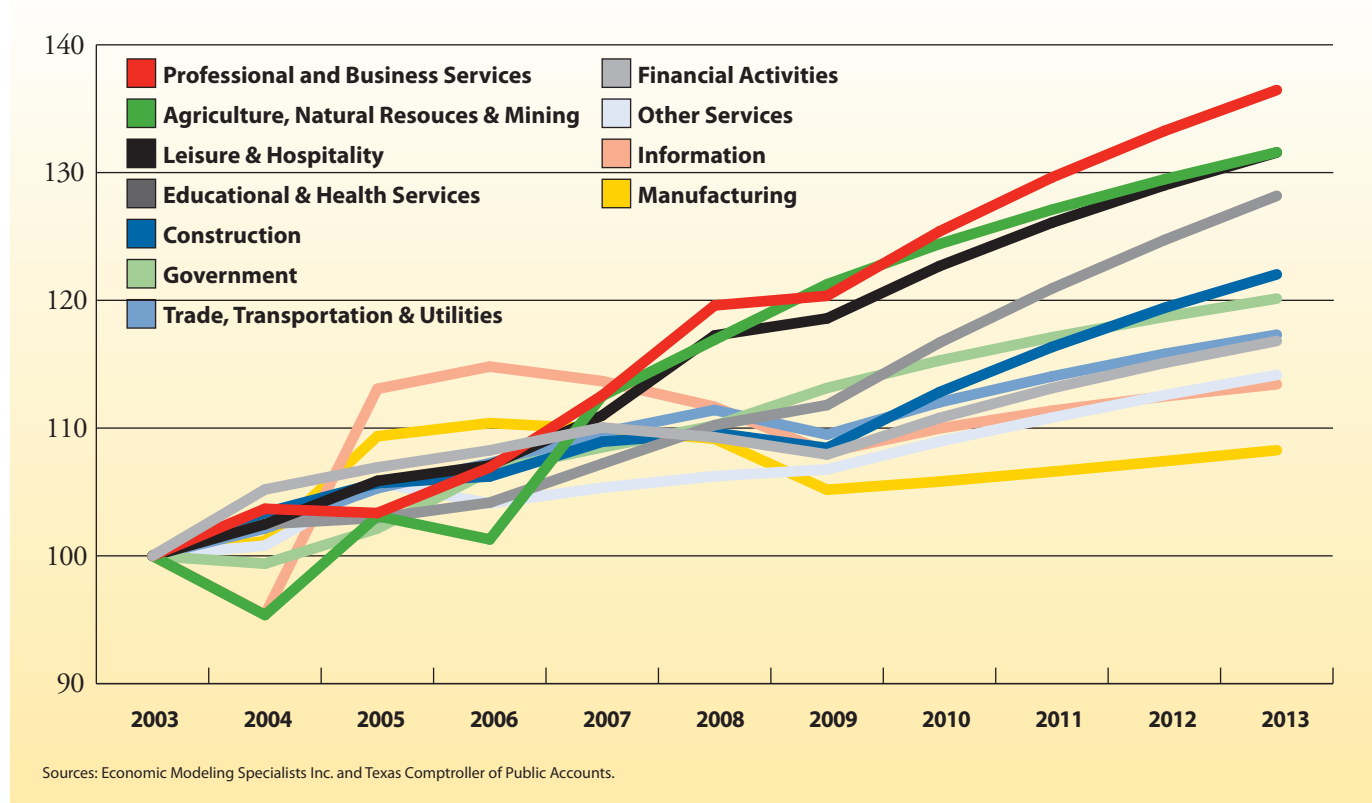


Source: Economic Modeling Specialists Inc.



Exhibit 3

Industry Employment Projections, Central Texas Region, 2003-2013



region’s three metropolitan statistical areas (MSAs) and the non-metro counties. These expected changes are presented in the form of growth indices using 2003 as the base year, with an index equal to 100.

The region has experienced job growth similar to the state’s growth, and should follow state trends through 2013. The employment growth rate in Central Texas should outpace Texas growth in 2009, with a projected decrease in Texas of less than 1 percent, while Central Texas is projected to grow less than 1 percent. Growth in the Bryan-College Station metro area should exceed the Texas growth rate in 2009 and continue outpacing the state through 2013. Non-metro counties in Central Texas are

projected to lose jobs in 2009, followed by projected job gains through 2013.

Economic Trends

Exhibit 3 provides a detailed picture of projected employment growth in Central Texas, displaying growth indices for various industries in the region, with 2003 as the base year. Employment for these industries is presented at the 11-industry “supersector” level of the North American Industry Classification System (NAICS).⁴

A supersector, as identified by a two-digit NAICS code, represents an aggregation of industries producing related goods and services. At this level, industries are classified into either goods-producing or service-producing



Messina Hof Winery

Bryan’s award-winning Messina Hof Winery and Resort was founded in 1977, and has since made a significant impact on the Bryan-College Station community, both economically and culturally. The Bonarrigos drew from their Sicilian and German heritages to create a romantic getaway that encompasses high-quality food, wine and lodging. The establishment’s 100-acre property offers guests tranquil walks through the vineyards. Rooms at the Messina Hof Villa boast themes from romantic, mythical times and places. In addition, Messina Hof’s on-site restaurant has been voted one of the top three restaurants in Texas.⁵

Messina Hof’s economic impact on the community is undeniable. In 2005, resort founder Paul Bonarrigo served as chair of the Texas Wine Industry Development Advisory Committee, a committee that was newly formed under the direction of current Comptroller of Public Accounts Susan Combs, who was then Agriculture Commissioner. In June of 2008, Agriculture Commissioner Todd Staples celebrated the rapid growth of the state’s wine industry by speaking at Messina Hof’s kickoff event for the harvest season. Texas is the fifth largest wine producer in the nation, and the Texas Department of Agriculture estimates the industry’s economic impact at \$1.35 billion for the year 2007 alone.⁶

Messina Hof hosts an annual harvest festival from mid-July to mid-August, during which visitors can participate in grape picking and stomping, the traditional first steps in the winemaking process. Guests at the festival also participate in dinners at the resort’s restaurant, the Vintage House Restaurant. Messina Hof is the proud four-time winner of the Houston Livestock Show and Rodeo’s “Top Texas Wine” award.⁷

supersectors. The goods-producing group comprises three supersectors pertaining to natural resources and mining, construction and manufacturing. The service-producing group comprises seven supersectors providing services including Education and Health, Finance, Government, Information, Leisure and Hospitality, other Services and Trade, Transportation and Utilities.

All of the 11 supersectors in **Exhibit 3** should show positive growth between 2003 and 2013. Overall, jobs in the Central Texas economy are expected to grow by 21 percent during this period, despite the current national downturn.

Of the projections by period’s end, three supersectors show steady expansion throughout the period. The Professional and Business Services sector should top all supersector growth with 36 percent more jobs in 2013 than 2003. The sector is projected to add

jobs each year to finish with 33,239 in 2013, led by Financial Support Services projected to add 1,589 jobs over the period. Engineering Services should lead all industries in the sector with 2,839 jobs in 2013.

Leisure and Hospitality is another supersector projected to add jobs each year, growing 32 percent from 2003 to 2013 to finish the period with 43,249 jobs. Most of this growth is attributable to its leading job industry, Limited Service Restaurants, which is projected to add 5,644 jobs by 2013.

The third supersector projected to add jobs each year is Education and Health Services. General Medical and Surgical Hospitals lead all industries in jobs and job growth throughout the period, projected to add 42 percent of supersector jobs by 2013 to finish with 17,658. Home Health Care Services should finish as the second largest industry with 7,526 jobs projected in 2013. Educational

Overall, jobs in the Central Texas economy are expected to grow by 21 percent between 2003 and 2013.



industries as a group are projected to grow more modestly, led by Colleges, Universities and Professional Schools contributing 4 percent of supersector job growth by 2013.

Despite various industry downturns, other supersectors show strong projected job growth. At almost 32 percent, projected growth in the Agriculture, Natural Resources and Mining sector trails only growth in Professional and Business Services. This comes after strong rebounds from contractions in 2004 and 2006, and growth projected through the 2009 national recession.

Oil and Gas Support Activities should lead all supersector industries, contributing 72 percent job growth by 2013. Dimension Stone Mining and Quarrying should see large percentage gains, projected to finish with 280 jobs in 2013 from a start of only 11 jobs in 2003.

Government represents the largest regional supersector with 170,074 projected jobs in 2013. Government jobs should increase by 20 percent from 2003 to 2013, led by a projected job gain of 9,682 in State Government. Local Government accounts for more employment than any industry in the region with 60,222 jobs projected in 2013. Most of these Local Government jobs are in public schools. Except for a slight contraction in 2004, the supersector is projected to add jobs in each year of the 10-year period.

Other supersectors anticipating positive job growth rates over the period include Construction (22 percent); Trade, Transportation and Utilities (17 percent); Financial Activities (17 percent); Other Services (14 percent); Information (13 percent); and Manufacturing (8 percent).⁸

Fairfield Industrial Park

Located in Freestone County, the Fairfield Industrial Development Corporation (FIDC) has built an industrial park facility on 30 acres of land located along I-45 within the city limits. Another 370 acres purchased a year ago will supplement the original acreage purchased in 1995. For the time being, development plans for the additional acreage include a 50-acre plot called phase 1A that will accommodate at least 10 companies, mostly from outside the region.

The four companies currently housed at the industrial park employ 46 people. These businesses rely on each other's goods and services. One company produces plastic tanks for water and chemical storage, while two others perform oil and gas chemical services, and a rental company provides event and business equipment.⁹

The city and its development corporation are considering housing, commercial, and retail developments to support the industrial expansion. However, city officials must carefully weigh any development projects against community concerns of local and historical preservation. Many Fairfield citizens take pride in their community's small town feel and enjoy, for example, a number of locally-owned retail establishments.¹⁰

Blue Bell Ice Cream

Blue Bell Creameries opened its doors in 1907 in Brenham, TX. Previously known as the Brenham Creamery Company and originally started as a butter manufacturer, Blue Bell changed its name in 1930 to honor the area's Blue Bell wildflower. Blue Bell produces 50 different ice cream flavors and is sold in 17 states. The company's objective is to maintain its commitment to quality ingredients and a quality product at a fair price.¹¹ The company currently has some 2,900 employees and profits from "an estimated \$400 million in annual sales."¹²

Blue Bell offers a variety of ice cream-related products including sherbets, frozen yogurt, and ice cream with no sugar added, which is low in fat content. The company accepts recommendations for ice cream flavors from the public. Suggestions can be made through the "Comment" section of the Blue Bell Web site.¹³ Week-day tours are available at the production facilities in Brenham. Blue Bell also ships ice cream to customers.¹⁴



Economic Structure

Job growth depends upon a region's underlying economic structure. That structure includes multiple factors, including natural resources, labor force characteristics and the composition and concentration of the region's industries.

This latter characteristic, also called *clustering*, is particularly important since industry clusters give firms within them access to more suppliers and to skilled laborers with valuable knowledge and information.¹⁵ The benefits that result from high industry concentrations give a region its competitive edge.¹⁶

One tool that can be used to identify industry concentration is the "location quotient." The location quotient identifies industry concentration by comparing the share of a region's economy attributable to a specific industry in comparison to the share that same industry accounts for in the nation's economy.

In essence, the share an industry accounts for in the national economy is seen as the "norm" for that industry, so comparing that norm with its share of a regional economy indicates whether that region tends to have "a lot" or "a little" of a particular industry. Typically, a region will contain "a lot" of industries

for which it has some natural or developed competitive advantage, based for instance on a local abundance of a particular resource, a favorable climate, an advantageous natural feature (such as proximity to a port), a highly educated labor force or some other factor.

A location quotient greater than one indicates a high regional employment concentration in an industry compared to the same industry at the national level. This means that the region is "specialized" in that particular industry. A location quotient of less than one indicates that the region's concentration in the industry is less than the national industry level. In essence, the region is *less* specialized in that given industry.

Exhibit 4 lists industries in Central Texas region with location quotients exceeding two based on 2008 employment, meaning the region's share of employment in an industry is at least twice as large as the nation's share. These industries are grouped according to their respective NAICS supersectors and ranked from the highest to lowest location quotient within each supersector.¹⁷

Primary aluminum production manufacturing has the region's highest location

(text continued on Page 14)

Toyota Processing Plant

Houston-based vehicle distributor Gulf States Toyota plans to expand its operations into Temple. Gulf States Toyota processes and transfers Toyota vehicles, parts and accessories to dealerships in Arkansas, Louisiana, Texas, Oklahoma and Mississippi. The company is investing \$50 million into buildings for the Temple plant that will allow for future expansion and modifications.¹⁸ Once started, construction is scheduled to last 18 months. Gulf States plans to hire about 240 workers (220 in installation/logistics and 20 in management) for its Temple operation. The company hopes to hire up to 500 workers as the site's capacity expands.

Gulf States' primary reason for building in Temple was its infrastructure. The 305-acre site, located at Temple's Rail Park at Central Pointe, offers 24-hour rail service, a crucial factor in Gulf States' distribution operation. The company also cited Temple's trained work force, particularly retired military personnel with strong logistical skills.¹⁹



Exhibit 4

Central Texas Largest Industry Location Quotients, 2008***Agriculture, Natural Resources and Mining***

NAICS Code	Description	2008 Jobs	2008 Location Quotient
212325	Clay, ceramic, and refractory minerals mining	156	10.64
212311	Dimension stone mining and quarrying	197	7.27
212111	Bituminous coal and lignite surface mining	901	7.21
212322	Industrial sand mining	71	5.18
213112	Support activities for oil and gas operations	2,142	2.96
212393	Other chemical and fertilizer mineral mining	29	2.81
212324	Kaolin and ball clay mining	27	2.77
211112	Natural gas liquid extraction	38	2.21

Construction

NAICS Code	Description	2008 Jobs	2008 Location Quotient
238142	Nonresidential masonry contractors	814	2.33
237120	Oil and gas pipeline construction	745	2.14
237110	Water and sewer system construction	1,267	2.00

Manufacturing

NAICS Code	Description	2008 Jobs	2008 Location Quotient
331312	Primary aluminum production	837	21.28
326130	Laminated plastics plate, sheet, and shapes	1,259	19.92
322223	Plastics, foil, and coated paper bag manufacturing	514	19.09
337127	Institutional furniture manufacturing	1,147	15.15
333995	Fluid power cylinder and actuator manufacturing	725	12.30
327410	Lime manufacturing	179	12.20
321991	Manufactured home, mobile home, manufacturing	1,196	10.36
332996	Fabricated pipe and pipe fitting manufacturing	913	8.84
311520	Ice cream and frozen dessert manufacturing	565	8.65
327310	Cement manufacturing	458	8.15
315999	All other accessory and apparel manufacturing	179	7.63
336212	Truck trailer manufacturing	720	6.89
339942	Lead pencil and art good manufacturing	124	6.53
313230	Nonwoven fabric mills	265	6.10
311330	Confectionery manufacturing from purchased chocolate	671	6.01
327213	Glass container manufacturing	330	5.92
331492	Secondary processing of other nonferrous	176	5.47
335911	Storage battery manufacturing	236	4.81
331513	Steel foundries, except investment	307	4.42



Exhibit 4 (cont.)

Central Texas Largest Industry Location Quotients, 2008

NAICS Code	Description	2008 Jobs	2008 Location Quotient
327991	Cut stone and stone product manufacturing	430	4.31
325520	Adhesive manufacturing	279	4.06
337214	Office furniture, except wood, manufacturing	331	3.80
332722	Bolt, nut, screw, rivet, and washer manufacturing	526	3.74
327125	Nonclay refractory manufacturing	77	3.59
333924	Industrial truck, trailer, and stacker manufacturing	280	3.57
326140	Polystyrene foam product manufacturing	331	3.49
333132	Oil and gas field machinery and equipment	697	3.40
311615	Poultry processing	2,619	3.32
322291	Sanitary paper product manufacturing	349	3.32
336214	Travel trailer and camper manufacturing	401	3.17
339944	Carbon paper and inked ribbon manufacturing	17	3.17
332111	Iron and steel forging	268	3.15
325314	Fertilizer, mixing only, manufacturing	84	3.09
312111	Soft drink manufacturing	772	3.03
332420	Metal tank, heavy gauge, manufacturing	305	2.92
334515	Electricity and signal testing instruments	361	2.70
334511	Search, detection, and navigation instruments	1,274	2.52
337910	Mattress manufacturing	211	2.43
332321	Metal window and door manufacturing	543	2.42
337110	Wood kitchen cabinet and countertop manufacturing	1,184	2.42
321214	Truss manufacturing	258	2.40
331521	Aluminum die-casting foundries	161	2.38
333922	Conveyor and conveying equipment manufacturing	232	2.34
311999	All other miscellaneous food manufacturing	190	2.20
313210	Broadwoven fabric mills	257	2.17
321918	Other millwork, including flooring	357	2.10
314911	Textile bag mills	54	2.09

Trade, Transportation and Utilities

NAICS Code	Description	2008 Jobs	2008 Location Quotient
424520	Livestock merchant wholesalers	496	7.37
221111	Hydroelectric power generation	868	6.93
486110	Pipeline transportation of crude oil	155	5.39
488190	Other support activities for air transport	1,387	4.37
493130	Farm product warehousing and storage	96	3.31



Exhibit 4 (cont.)

Central Texas Largest Industry Location Quotients, 2008

NAICS Code	Description	2008 Jobs	2008 Location Quotient
423520	Coal and other mineral merchant wholesalers	23	2.87
424430	Dairy product merchant wholesalers	372	2.83
423140	Used motor vehicle parts merchant wholesalers	226	2.82
424710	Petroleum bulk stations and terminals	292	2.72
221310	Water supply and irrigation systems	318	2.56
424410	General line grocery merchant wholesalers	1,910	2.52
424950	Paint and supplies merchant wholesalers	189	2.27
423130	Tire and tube merchant wholesalers	151	2.03

Information

NAICS Code	Description	2008 Jobs	2008 Location Quotient
517212	Cellular and other wireless carriers	1,326	2.27
515210	Cable and other subscription programming	572	2.08

Financial Activities

NAICS Code	Description	2008 Jobs	2008 Location Quotient
522294	Secondary market financing	684	10.48
533110	Lessors of nonfinancial intangible assets	434	4.41
522298	All other nondepository credit intermediation	629	3.16
531130	Miniwarehouse and self-storage unit operators	306	2.27

Professional and Business Services

NAICS Code	Description	2008 Jobs	2008 Location Quotient
561210	Facilities support services	2,081	4.73
561622	Locksmiths	196	3.79
561491	Repossession services	44	2.15
541191	Title abstract and settlement offices	417	2.10

Educational and Health Services

NAICS Code	Description	2008 Jobs	2008 Location Quotient
62161	Home health care services	6,298	2.06

Leisure and Hospitality

NAICS Code	Description	2008 Jobs	2008 Location Quotient
721310	Rooming and boarding houses	88	2.61

Government

NAICS Code	Description	2008 Jobs	2008 Location Quotient
912000	Federal government, military	52,238	7.76
920000	State government	37,889	2.19

Source: Economic Modeling Specialists Inc.



quotient, with a measure of 21.28. In other words, the industry’s level of employment in Central Texas is more than 21 times larger than its national counterpart.

Most Competitive Industries

While location quotients provide important information on regional industry concentrations, they offer only a snapshot — a static measure at a particular point in time. To assess the competitive resilience of a regional industry, a more dynamic measure is needed. One such measure is “shift-share analysis.”

In this analysis, the change in an industry’s regional presence is divided into three components: the portion attributable to the overall growth or decline in the nation’s economy (the national growth effect); that attributable to the difference between the national trend for an industry and the national trend for all

industries (the industry mix effect); and that attributable to the region’s competitiveness as a site for the industry (the regional competitiveness effect).

Exhibit 5 lists the Central Texas region’s most competitive industries based on shift-share analysis. The industries are ranked based on their employment change in the regional competitiveness component (and thus the industry’s comparative advantage in the region) between 2002 and 2008.

Despite the fact that national military employment grew at a slower pace than the rest of the national economy (negative industry mix effect) this is not the case for the Central Texas Region. Due to the presence of Fort Hood, the most competitive industry in the region is the military, which increased by 7,359 jobs between 2002 and 2008.

(text continued on Page 17)



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Exhibit 5

Most Competitive Industries, Central Texas Region, 2008

Rank	Description	Super Sector	National Growth Effect	Industry Mix Effect	Regional Competitive Effect	Jobs Added
1	Federal government, military	Government	2,411	(3,616)	8,564	7,359
2	State government	Government	1,825	(451)	2,555	3,929
3	General medical and surgical hospitals	Educational and Health Services	664	411	1,431	2,505
4	Navigational, measuring, electromedical, and control instruments manufacturing	Manufacturing	27	(19)	1,333	1,341
5	Wireless telecommunications carriers	Information	12	(7)	1,177	1,183
6	Department stores	Trade, Transportation and Utilities	166	(314)	1,097	949
7	General warehousing and storage	Trade, Transportation and Utilities	10	42	1,016	1,068
8	Limited-service eating places	Leisure and Hospitality	789	1,438	830	3,056



Exhibit 5 (cont.)

Most Competitive Industries, Central Texas Region, 2008

Rank	Description	Super Sector	National Growth Effect	Industry Mix Effect	Regional Competitive Effect	Jobs Added
9	Other nondepository credit intermediation	Financial Activities	91	(312)	793	573
10	Facilities support services	Professional and Business Services	56	212	762	1,031
11	Full-service restaurants	Leisure and Hospitality	545	821	726	2,092
12	Site preparation contractors	Construction	53	82	682	817
13	Commercial banking	Financial Activities	221	(3)	598	816
14	Direct life and health insurance carriers	Financial Activities	36	(37)	563	562
15	Crop and animal production	Agriculture, Natural Resources and Mining	232	(1,028)	492	(305)
16	Other household and institutional furniture	Manufacturing	67	(425)	479	122
17	Motor vehicle body and trailer manufacturing	Manufacturing	41	(57)	443	428
18	Wood kitchen cabinet and countertop manufacturing	Manufacturing	41	(61)	442	422
19	All other general merchandise stores	Trade, Transportation and Utilities	46	(33)	431	445
20	New car dealers	Trade, Transportation and Utilities	204	(456)	412	159
21	Mining and oil and gas field machinery manufacturing	Manufacturing	12	67	408	487
22	All other fabricated metal product manufacturing	Manufacturing	32	(15)	405	421
23	Federal government, civilian, except postal service	Government	584	(253)	378	709
24	Collection agencies	Professional and Business Services	5	(1)	370	374
25	Oil and gas pipeline construction	Construction	15	111	346	472
26	All other wood product manufacturing	Manufacturing	55	(229)	346	173
27	Cement manufacturing	Manufacturing	6	(2)	344	349
28	Hotels and motels, except casino hotels	Leisure and Hospitality	127	(11)	342	458
29	Pharmaceutical and medicine manufacturing	Manufacturing	21	(21)	340	340
30	Electrical contractors	Construction	104	16	325	444



Exhibit 5 (cont.)

Most Competitive Industries, Central Texas Region, 2008

Rank	Description	Super Sector	National Growth Effect	Industry Mix Effect	Regional Competitive Effect	Jobs Added
31	Computer systems design and related services	Professional and Business Services	73	310	325	706
32	Soft drink and ice manufacturing	Manufacturing	26	(47)	322	301
33	Engineering services	Professional and Business Services	97	319	316	732
34	Other specialized trucking, local	Trade, Transportation and Utilities	16	0	308	324
35	Water and sewer system construction	Construction	49	8	307	363
36	Commercial machinery repair and maintenance	Other Services	17	55	303	375
37	Dairy product merchant wholesalers	Trade, Transportation and Utilities	4	2	292	297
38	Postal service	Trade, Transportation and Utilities	109	(316)	286	79
39	Ambulance services	Educational and Health Services	13	51	273	338
40	Offices of physicians	Educational and Health Services	271	412	249	932
41	Office administrative services	Professional and Business Services	27	129	246	402
42	Educational support services	Educational and Health Services	10	99	245	354
43	Computer and software merchant wholesalers	Trade, Transportation and Utilities	10	(17)	226	219
44	Supermarkets and other grocery stores	Trade, Transportation and Utilities	337	(174)	222	385
45	Farm and garden equipment merchant wholesalers	Trade, Transportation and Utilities	21	(16)	219	225
46	Plumbing and HVAC contractors	Construction	149	289	216	654
47	Veterinary services	Professional and Business Services	43	105	216	364
48	Battery manufacturing	Manufacturing	1	(3)	211	209
49	Men's clothing stores	Trade, Transportation and Utilities	4	(8)	211	208
50	Real estate property managers	Financial Activities	27	55	208	290

Sources: Economic Modeling Specialists Inc., Texas Workforce Commission, and Texas Comptroller of Public Accounts.



The general medical and surgical hospitals industry was the highest-ranked industry in which all three components of job growth increased. This industry grew by 2,505 jobs during this period, as local factors from the competitiveness effect contributed to 1,431 jobs, or 57 percent, of this increase. The remaining growth was due to a growing national economy and an industry growing faster than its national counterpart. Another similar example is the general warehousing and storage industry, in which local conditions contributed to 95 percent of job growth.

Good Jobs for the Future

Shift-share analysis identifies the region’s most competitive industries — those that

possess the best chances for increased employment opportunities. What types of occupations can Central Texans expect to find within these industries? **Exhibit 6** presents a list of “good jobs” for the region’s future, grouping them based on their educational requirements.

For the purpose of this analysis, a “good job” is one for which the weighted average of median annual earnings, as reported by the Texas Workforce Commission, exceeds the state’s 2007 per capita personal income level of \$37,187.²⁰ In the Central Texas region, 265 occupations pay more than this amount.

Occupations requiring doctoral and professional degrees command the highest annual

(text continued on Page 28)

Exhibit 6

“Good Jobs,” Central Texas Region, 2008-2013

Doctoral and First Professional Degrees

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	2008 Median Annual Earnings
Physicians and surgeons	2,374	2,717	560	343	217	\$143,270
Dentists, general	139	153	28	14	14	141,898
Podiatrists	24	27	7	3	4	119,538
Optometrists	97	110	21	13	8	110,739
Pharmacists	647	763	174	116	58	103,563
Lawyers	621	703	142	82	60	94,890
Postsecondary teachers	9,860	12,053	3,060	2,193	867	82,914
Audiologists	24	27	4	3	1	73,154
Veterinarians	203	259	78	56	22	67,496
Computer and information scientists, research	21	25	7	4	3	63,669
Biochemists and biophysicists	12	14	3	2	1	55,349
Astronomers	36	41	10	5	5	52,770
Chiropractors	127	146	26	19	7	51,750
Physicists	24	28	7	4	3	51,002



Exhibit 6 (cont.)

“Good Jobs,” Central Texas Region, 2008-2013

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	2008 Median Annual Earnings
Clinical, counseling, and school psychologists	356	401	73	45	28	46,696
Medical scientists, except epidemiologists	788	964	306	176	130	42,661
Microbiologists	18	20	4	2	2	39,998
Total	15,371	18,451	4,510	3,080	1,430	
Weighted Average of Median Annual Earnings						\$90,758

Master’s Degree

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	2008 Median Annual Earnings
Operations research analysts	92	100	17	8	9	\$75,400
Curators	35	41	14	6	8	69,992
Occupational therapists	250	293	62	43	19	69,451
Psychologists, all other	121	136	25	15	10	67,350
Physical therapists	305	361	75	56	19	67,101
Geoscientists, except hydrologists and geographers	209	239	58	30	28	67,080
Statisticians	15	18	6	3	3	61,256
Museum Technicians and Conservators	27	31	10	4	6	55,682
Hydrologists	36	40	9	4	5	53,186
Counselors, all other	292	325	62	33	29	50,794
Epidemiologists	18	21	6	3	3	50,211
Environmental scientists and specialists, including health	326	370	88	44	44	48,110
Speech-language pathologists	327	364	69	37	32	47,757
Industrial-organizational psychologists	24	28	6	4	2	46,966
Educational, vocational, and school counselors	899	1,018	209	119	90	46,904
Urban and regional planners	113	128	32	15	17	46,488
Librarians	452	492	101	40	61	45,531
Instructional coordinators	513	617	140	104	36	45,115
Health educators	89	102	18	13	5	42,307
Social scientists and related workers, all other	162	183	48	21	27	42,162
Marriage and family therapists	18	21	5	3	2	41,246



Exhibit 6 (cont.)

“Good Jobs,” Central Texas Region, 2008-2013

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	2008 Median Annual Earnings
Economists	45	50	12	5	7	38,917
Sociologists	12	13	2	1	1	38,584
Mental health and substance abuse social workers	114	131	29	17	12	37,814
Total	4,494	5,122	1,103.	628	475	
Weighted Average of Median Annual Earnings						\$51,378

Degree Plus Work Experience

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	2008 Median Annual Earnings
Natural sciences managers	64	72	15	8	7	\$118,914
Engineering managers	213	235	44	22	22	117,541
Human resources managers, all other	44	49	9	5	4	110,240
Marketing managers	137	152	30	15	15	106,704
Chief executives	536	565	102	29	73	101,400
Compensation and benefits managers	91	100	18	9	9	89,856
Public relations managers	78	87	18	9	9	89,648
Training and development managers	45	51	10	6	4	89,606
Computer and information systems managers	243	274	51	31	20	89,378
Sales managers	419	445	72	26	46	82,909
Actuaries	21	24	7	3	4	81,973
Purchasing managers	86	91	17	5	12	81,598
Education administrators, postsecondary	166	193	51	27	24	75,358
Advertising and promotions managers	29	31	5	2	3	74,797
Financial managers	629	687	104	58	46	73,570
General and operations managers	5,383	5,667	928	284	644	70,533
Medical and health services managers	697	791	161	94	67	64,626
Education administrators, elementary and secondary school	978	1,074	232	96	136	61,291
Administrative services managers	1,016	1,121	241	105	136	59,717
Arbitrators, mediators, and conciliators	19	21	4	2	2	51,979
Management analysts	557	647	139	90	49	51,397
Vocational education teachers, secondary school	591	614	123	23	100	43,043



Exhibit 6 (cont.)

“Good Jobs,” Central Texas Region, 2008-2013

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	2008 Median Annual Earnings
Vocational education teachers, middle school	57	59	10	2	8	41,650
Education administrators, all other	41	48	13	7	6	38,564
Total	12,140	13,098	2,404	958	1,446	
Weighted Average of Median Annual Earnings						\$70,524

Bachelor’s Degree

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	2008 Median Annual Earnings
Petroleum engineers	370	423	103	53	50	\$119,142
Airline pilots, copilots, and flight engineers	196	217	50	21	29	112,778
Computer hardware engineers	17	19	5	2	3	107,723
Aerospace engineers	96	107	21	11	10	104,957
Engineers, all other	99	108	15	9	6	90,813
Orthotists and prosthetists	28	32	5	4	1	86,674
Mining and geological engineers, including mining safety engineers	15	17	4	2	2	80,850
Physician assistants	203	242	53	39	14	80,725
Sales engineers	175	189	36	14	22	80,454
Health diagnosing and treating practitioners, all other	112	129	27	17	10	80,101
Chemical engineers	51	59	15	8	7	77,875
Industrial engineers	291	337	81	46	35	77,314
Health and safety engineers, except mining safety engineers and inspectors	80	89	19	9	10	75,400
Materials engineers	82	89	17	7	10	74,589
Computer software engineers, applications	408	515	138	107	31	73,237
Financial analysts	288	338	58	50	8	72,114
Physical scientists, all other	26	29	6	3	3	71,157
Electrical engineers	249	272	52	23	29	65,187
Electronics engineers, except computer	207	224	42	17	25	65,083
Computer software engineers, systems software	456	550	128	94	34	63,773
Financial examiners	14	15	2	1	1	62,941
Materials scientists	98	119	35	21	14	62,317



Exhibit 6 (cont.)

“Good Jobs,” Central Texas Region, 2008-2013

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	2008 Median Annual Earnings
Mechanical engineers	348	376	66	28	38	61,630
Medical and clinical laboratory technologists	1,215	1,397	278	182	96	60,840
Environmental engineers	80	91	23	11	12	59,030
Landscape architects	20	23	5	3	2	57,907
Civil engineers	826	927	212	101	111	57,699
Database administrators	323	384	79	61	18	57,512
Dietitians and nutritionists	177	194	40	17	23	57,325
Logisticians	337	398	88	61	27	57,138
Athletic trainers	94	110	25	16	9	56,950
Therapists, all other	24	27	4	3	1	56,243
Securities, commodities, and financial services sales agents	194	211	41	17	24	55,182
Occupational health and safety specialists	135	153	31	18	13	54,787
Budget analysts	178	199	42	21	21	54,704
Computer programmers	640	663	103	23	80	54,704
Business operation specialists, all other	2,455	2,880	562	425	137	54,558
Commercial and industrial designers	14	14	2	0	2	54,558
Computer systems analysts	979	1,169	324	190	134	54,538
Writers and authors	28	31	6	3	3	54,267
Network and computer systems administrators	809	949	234	140	94	53,435
Insurance underwriters	88	90	14	2	12	53,290
Technical writers	48	54	13	6	7	52,915
Kindergarten teachers, except special education	739	844	166	105	61	52,541
Set and exhibit designers	18	20	4	2	2	51,813
Soil and plant Scientists	32	36	9	4	5	51,605
Chemists	150	175	46	25	21	51,147
Architects, except landscape and naval	114	127	24	13	11	50,898
Personal financial advisors	129	154	31	25	6	50,710
Human resources, training, and labor relations specialists, all other	218	252	58	34	24	50,523
Zoologists and wildlife biologists	30	34	7	4	3	49,754
Food scientists and technologists	56	64	17	8	9	48,776
Construction managers	1,062	1,172	192	110	82	48,131



Exhibit 6 (cont.)

“Good Jobs,” Central Texas Region, 2008-2013

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	2008 Median Annual Earnings
Credit analysts	95	96	18	1	17	47,382
Biological scientists, all other	130	146	30	16	14	47,320
Education, training, and library workers, all other	91	104	19	13	6	47,154
Compensation, benefits, and job analysis specialists	271	306	65	35	30	47,070
Multi-media artists and animators	51	63	18	12	6	47,029
Accountants and auditors	2,402	2,662	470	260	210	46,925
Loan officers	891	923	78	32	46	46,862
Public relations specialists	361	405	58	44	14	46,550
Training and development specialists	500	569	123	69	54	46,280
Legal support workers, all other	33	36	6	3	3	45,802
Surveyors	139	160	43	21	22	45,552
Adult literacy, remedial education, and GED teachers and instructors	283	327	60	44	16	45,198
Animal scientists	143	164	44	21	23	44,491
Secondary school teachers, except special and vocational education	4,192	4,546	973	354	619	42,278
Film and video editors	14	15	2	1	1	41,933
Network systems and data communications analysts	318	419	135	101	34	41,850
Social and community service managers	207	231	44	24	20	41,600
Social workers, all other	275	310	65	35	30	40,976
Middle school teachers, except special and vocational education	3,388	3,773	753	385	368	40,570
Special education teachers, secondary school	278	305	58	27	31	40,389
Special education teachers, preschool, kindergarten, and elementary school	598	693	162	95	67	40,176
Medical and public health social workers	271	309	67	38	29	39,894
Elementary school teachers, except special education	6,113	6,896	1,450	783	667	39,810
Conservation scientists	58	64	15	6	9	39,707
Financial specialists, all other	91	101	22	10	12	39,582
Special education teachers, middle school	294	335	74	41	33	39,322



Exhibit 6 (cont.)

“Good Jobs,” Central Texas Region, 2008-2013

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	2008 Median Annual Earnings
Insurance sales agents	409	424	58	15	43	38,979
Meeting and convention planners	62	71	15	9	6	38,147
Employment, recruitment, and placement specialists	451	495	91	44	47	38,064
Life scientists, all other	19	21	5	2	3	37,939
Probation officers and correctional treatment specialists	298	339	58	41	17	37,794
Total	37,847	42,645	8,737	4,798	3,939	
Weighted Average of Median Annual Earnings						\$49,559

Associate Degree

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	2008 Median Annual Earnings
Diagnostic medical sonographers	127	152	34	25	9	\$85,842
Nuclear medicine technologists	67	79	17	12	5	68,598
Computer specialists, all other	241	274	65	33	32	65,333
Dental hygienists	344	412	102	68	34	63,315
Respiratory therapists	452	554	137	102	35	62,109
Mechanical engineering technicians	181	199	36	18	18	55,827
Registered nurses	7,646	8,980	1,984	1,334	650	54,621
Physical therapist assistants	146	178	42	32	10	53,352
Electro-mechanical technicians	24	25	3	1	2	50,794
Funeral directors	90	101	22	11	11	49,733
Respiratory therapy technicians	160	180	45	20	25	49,608
Cardiovascular technologists and technicians	168	209	53	41	12	48,547
Electrical and electronic engineering technicians	404	440	76	36	40	46,987
Industrial engineering technicians	155	167	27	12	15	43,430
Radiologic technologists and technicians	714	823	159	109	50	43,139
Interior designers	45	49	10	4	6	42,307
Occupational therapist assistants	61	70	14	9	5	41,018
Fish and game wardens	14	16	4	2	2	40,040
Social science research assistants	70	82	26	12	14	39,437
Medical and clinical laboratory technicians	1,149	1,348	289	199	90	38,771



Exhibit 6 (cont.)

“Good Jobs,” Central Texas Region, 2008-2013

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	2008 Median Annual Earnings
Computer support specialists	1,522	1,702	419	180	239	37,606
Semiconductor processors	89	104	29	15	14	37,315
Total	13,869	16,144	3,593	2,275	1,318	
Weighted Average of Median Annual Earnings						\$51,032

Postsecondary Vocational Award

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	2008 Median Annual Earnings
Commercial pilots	64	74	19	10	9	\$64,418
Electrical and electronics repairers, powerhouse, substation, and relay	86	78	7	-8	15	57,325
Ship engineers	25	28	6	3	3	49,296
Aircraft mechanics and service technicians	439	494	77	55	22	48,194
Electrical and electronics drafters	77	82	16	5	11	47,133
Avionics technicians	64	70	9	6	3	46,072
Mechanical drafters	188	199	37	11	26	44,304
Appraisers and assessors of real estate	178	199	39	21	18	44,200
Electrical and electronics repairers, commercial and industrial equipment	293	334	93	41	52	42,931
Electrical and electronics installers and repairers, transportation equipment	72	75	11	3	8	40,893
Healthcare practitioners and technical workers, all other	122	140	30	18	12	40,456
Healthcare technologists and technicians, all other	282	327	57	45	12	39,312
Total	1,890	2,100	401	210	191	
Weighted Average of Median Annual Earnings						\$45,376

Long-term On-the-job Training

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	2008 Median Annual Earnings
Air traffic controllers	73	85	23	12	11	\$85,738
Transit and railroad police	22	23	4	1	3	73,778
Power distributors and dispatchers	32	30	4	-2	6	59,987



Exhibit 6 (cont.)

“Good Jobs,” Central Texas Region, 2008-2013

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	2008 Median Annual Earnings
Chemical plant and system operators	110	132	46	22	24	59,779
Gas plant operators	160	163	32	3	29	56,763
Claims adjusters, examiners, and investigators	1,053	1,118	201	65	136	54,579
Telecommunications equipment installers and repairers, except line installers	394	400	53	6	47	51,813
Power plant operators	136	130	16	-6	22	51,334
Boilermakers	60	67	18	7	11	50,731
Elevator installers and repairers	46	45	5	-1	6	49,046
Petroleum pump system operators, refinery operators, and gaugers	172	185	48	13	35	47,486
Telecommunications line installers and repairers	348	321	15	-27	42	46,862
Plant and system operators, all other	20	22	5	2	3	46,530
Numerical tool and process control programmers	26	26	3	0	3	44,304
Fire fighters	1,081	1,227	345	146	199	43,826
Compliance officers, except agriculture, construction, health and safety, and transportation	304	336	50	32	18	42,806
Military Occupations	52,238	53,323	7,420	1,085	6,335	42,432
Rail car repairers	108	113	16	5	11	41,642
Coaches and scouts	396	454	109	58	51	41,163
Media and communication workers, all other	16	18	4	2	2	41,018
Millwrights	108	113	12	5	7	39,978
Stationary engineers and boiler operators	167	183	30	16	14	39,915
Athletes and sports competitors	11	11	1	0	1	38,958
Brickmasons and blockmasons	323	321	30	-2	32	38,917
Aircraft structure, surfaces, rigging, and systems assemblers	121	130	21	9	12	38,542
Police and sheriff's patrol officers	2,421	2,733	639	312	327	38,438
Interpreters and translators	77	91	23	14	9	37,794
Plumbers, pipefitters, and steamfitters	886	973	176	87	89	37,669
Audio and video equipment technicians	34	39	11	5	6	37,627
Total	60,943	62,812	9,360	1,869	7,491	
Weighted Average of Median Annual Earnings						\$42,661



Exhibit 6 (cont.)

“Good Jobs,” Central Texas Region, 2008-2013

Moderate-term On-the-job Training

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	2008 Median Annual Earnings
Railroad conductors and yardmasters	77	84	22	7	15	\$76,107
Locomotive engineers and operators	156	164	35	8	27	62,234
Sales representatives, wholesale and manufacturing, technical and scientific products	562	601	99	39	60	57,366
Signal and track switch repairers	20	19	0	-1	1	55,390
Precision instrument and equipment repairers, all other	71	79	18	8	10	55,203
Chemical equipment operators and tenders	115	137	37	22	15	51,210
Audio-visual collections specialists	72	73	11	1	10	46,010
Gas compressor and gas pumping station operators	12	13	4	1	3	45,822
Media and communication equipment workers, all other	13	14	3	1	2	45,614
Sales representatives, services, all other	725	839	200	114	86	44,949
Railroad brake, signal, and switch operators	94	90	17	-4	21	44,034
Pump operators, except wellhead pumpers	22	24	8	2	6	43,930
Explosives workers, ordnance handling experts, and blasters	16	19	5	3	2	41,995
Control and valve installers and repairers, except mechanical door	311	330	46	19	27	41,704
Wellhead pumpers	27	32	13	5	8	41,205
Sales representatives, wholesale and manufacturing, except technical and scientific products	3,713	3,804	477	91	386	39,998
Derrick operators, oil and gas	84	105	28	21	7	39,603
Bailiffs	36	41	9	5	4	39,478
Extraction workers, all other	42	52	16	10	6	39,416
Metal workers and plastic workers, all other	38	33	2	-5	7	38,376
Pourers and casters, metal	215	180	-3	-35	32	37,606
Total	6,421	6,733	1,047	312	735	
Weighted Average of Median Annual Earnings						\$43,621



Exhibit 6 (cont.)

“Good Jobs,” Central Texas Region, 2008-2013**Short-term On-the-job Training**

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	2008 Median Annual Earnings
Parking enforcement workers	13	15	4	2	2	\$44,512
Postal service clerks	250	265	44	15	29	44,429
Postal service mail carriers	1,103	1,168	230	65	165	43,659
Postal service mail sorters, processors, and processing machine operators	447	441	36	-6	42	41,122
Riggers	59	62	5	3	2	39,499
Traffic technicians	23	26	5	3	2	39,125
Total	1,895	1,977	324	82	242	
Weighted Average of Median Annual Earnings						\$42,983

Work Experience in a Related Field

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	2008 Median Annual Earnings
Managers, all other	436	487	96	51	45	\$78,686
Real estate brokers	58	67	14	9	5	77,168
Industrial production managers	343	350	74	7	67	76,086
Fire inspectors and investigators	18	20	4	2	2	70,699
First-line supervisors/managers of fire fighting and prevention workers	33	37	9	4	5	66,248
Captains, mates, and pilots of water vessels	47	52	11	5	6	63,232
Postmasters and mail superintendents	119	125	21	6	15	60,882
First-line supervisors/managers of police and detectives	127	142	35	15	20	57,658
Detectives and criminal investigators	299	351	86	52	34	55,661
Transportation, storage, and distribution managers	251	269	55	18	37	55,099
First-line supervisors/managers of non-retail sales workers	502	512	45	10	35	54,725
Private detectives and investigators	93	103	19	10	9	53,102
First-line supervisors/managers, protective service workers, all other	48	55	11	7	4	50,835
First-line supervisors/managers of transportation and material-moving machine and vehicle operators	486	525	88	39	49	49,358



Exhibit 6 (cont.)

“Good Jobs,” Central Texas Region, 2008-2013

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	2008 Median Annual Earnings
First-line supervisors/managers of mechanics, installers, and repairers	1,375	1,467	251	92	159	49,192
Wholesale and retail buyers, except farm products	208	210	25	2	23	48,776
First-line supervisors/managers of construction trades and extraction workers	1,348	1,505	251	157	94	48,256
Purchasing agents, except wholesale, retail, and farm products	661	696	106	35	71	46,530
Food service managers	566	614	115	48	67	45,531
Lodging managers	104	121	29	17	12	44,054
Self-enrichment education teachers	140	170	38	30	8	43,930
First-line supervisors/managers of production and operating workers	2,208	2,238	261	30	231	42,744
Cost estimators	472	526	102	54	48	38,189
Construction and building inspectors	243	277	57	34	23	37,752
First-line supervisors/managers of office and administrative support workers	4,084	4,371	708	287	421	37,357
Total	14,269	15,290	2,511	1,021	1,490	
Weighted Average of Median Annual Earnings						\$46,214

Sources: Economic Modeling Specialists Inc., Texas Workforce Commission and Texas Comptroller of Public Accounts.

earnings, with weighted median earnings of \$90,758 for the region. Occupations requiring both a college degree and work experience provide the second-highest earnings, with weighted median earnings of \$70,524. Occupations requiring a master’s degree provide the third-highest annual earnings, with a weighted median of \$51,378.

In the Central Texas region, occupations requiring postsecondary vocational training provide weighted median earnings of \$45,376 annually. Occupations requiring

an associate degree (without work experience) yield higher earnings than occupations requiring a bachelor’s degree (without work experience). Associate degree occupations offer weighted median earnings of \$51,032, while bachelor’s degree occupations offer weighted median earnings of \$49,559.

Many occupations that meet the “good jobs” definition do not require a college degree. A number of occupations requiring related work experience, on-the-job-training or postsecondary vocational training also



Antique Rose Emporium

Brenham's Antique Rose Emporium specializes in selling antique and old garden roses. Unlike modern roses, which are hybrids that require a great deal of attention, antique roses are those that grow in the wild, surviving in desolate areas without the care of human hands.²¹ Today, the Antique Rose Emporium offers nearly 800 different antique rose varieties through locations in Brenham and San Antonio, as well as the Internet.

The Antique Rose Emporium's founder, G. Michael Shoup, became fascinated with antique roses in the late 1970s, when he discovered ever-blooming roses surviving without any apparent care in rather desolate surroundings in Central Texas. Through the early 1980s, Shoup found other rose varieties surviving in the wild and began cultivating them in his nursery. The Antique Rose Emporium display garden opened in 1985, along with a cottage garden and a small formal planting. The garden combines Texas native plants with roses, much as a pioneer gardener might have done in the 1850s.²²

The facility also serves as a place for hosting weddings, anniversaries and other celebrations. On the site is a 150-seat chapel, built in 1998, that incorporates many elements of various local churches, including a tall front door with an English stained glass transom and a vaulted ceiling. The reception house, Champneys' Green, is a restored 1904 Victorian home used for smaller functions. All of the buildings are located on landscaped grounds featuring antique roses, perennials and native plants.²³

The Antique Rose Emporium receives about 85,000 retail customers annually, with the retail centers in Independence (just north of Brenham) and San Antonio accounting for 70,000 visitors. Internet and mail-order sales make up the remaining 15,000 in customers. The Antique Rose Emporium has 200 wholesale customers such as landscapers and other facilities, located primarily in Texas. In 2008, sales for the business totaled about \$2.4 million. The retail centers in Independence and San Antonio accounted for approximately \$1.3 million in sales. Nationwide mail order sales generated about \$800,000, and wholesales accounted for \$300,000. The Antique Rose Emporium employs 30 people at its combined locations.²⁴

provide good wages. At weighted median earnings of \$46,214, jobs requiring work experience but no postsecondary education provide earnings near those requiring a bachelor's degree.

Exhibit 7 lists 25 occupations expected to have the highest number of job openings between 2008 and 2013. The job openings are divided between newly created jobs (growth) and the replacement of existing jobs. Military occupations top the list, with 7,420 job openings between 2008 and 2013 and median annual earnings of \$42,432.²⁵

Sixteen of the 25 occupations require short-term or moderate-term on-the-job training. These provide median annual

earnings ranging between \$13,582 and \$32,656. Nurses, with annual earnings over \$54,000, require an associate's degree. Three of the occupations – elementary, middle and secondary school teachers – require a bachelor's degree.

Comptroller Assistance

One of the many functions of the Texas Comptroller of Public Accounts is to analyze demographics, the labor force and other economic factors needed to generate local economic growth, and provide this information to local governments and other groups. Through its Texas EDGE (Economic Data for Growth and Expansion) program, the agency can



Exhibit 7

Occupations with the Most Projected Job Openings, Central Texas Region, 2008-2013

Rank	Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	2008 Median Annual Earnings
1	Military Occupations	52,238	53,323	7,420	1,085	6,335	\$42,432
2	Combined food preparation and serving workers, including fast food	14,314	16,575	3,643	2,261	1,382	14,082
3	Cashiers, except gaming	11,846	12,420	3,614	574	3,040	15,496
4	Retail salespersons	13,086	14,532	3,479	1,446	2,033	18,138
5	Postsecondary teachers	9,860	12,053	3,060	2,193	867	82,914
6	Waiters and waitresses	7,192	7,904	2,683	712	1,971	13,582
7	Registered nurses	7,646	8,980	1,984	1,334	650	54,621
8	Correctional officers and jailers	5,006	6,032	1,615	1,026	589	30,285
9	Customer service representatives	6,431	7,095	1,559	664	895	22,298
10	Office clerks, general	7,622	8,392	1,469	770	699	18,325
11	Elementary school teachers, except special education	6,113	6,896	1,450	783	667	39,810
12	Janitors and cleaners, except maids and housekeeping cleaners	6,065	6,785	1,312	720	592	17,763
13	Secretaries, except legal, medical, and executive	8,838	9,317	1,179	479	700	22,526
14	Executive secretaries and administrative assistants	5,504	6,162	1,101	658	443	32,656
15	Personal and home care aides	3,590	4,298	1,013	708	305	13,936
16	Secondary school teachers, except special and vocational education	4,192	4,546	973	354	619	42,278
17	General and operations managers	5,383	5,667	928	284	644	70,533
18	Teacher assistants	4,589	5,097	880	508	372	21,091
19	Laborers and freight, stock, and material movers, hand	5,431	5,475	868	44	824	18,699
20	Bookkeeping, accounting, and auditing clerks	4,876	5,357	861	481	380	26,229
21	Truck drivers, heavy and tractor-trailer	5,429	5,781	814	352	462	29,598
22	First-line supervisors/managers of retail sales workers	4,285	4,642	811	357	454	31,242
23	Construction laborers	5,040	5,647	795	607	188	20,904
24	Middle school teachers, except special and vocational education	3,388	3,773	753	385	368	40,570
25	Nursing aides, orderlies, and attendants	4,784	5,320	752	536	216	18,678

Sources: Economic Modeling Specialists Inc., Texas Workforce Commission, and Texas Comptroller of Public Accounts.



identify occupational and industry trends and their effects on local and regional economies.

Since August 2008, the Comptroller’s office has responded to 454 Texas EDGE requests from city and county government

officials, economic development corporations, private businesses and members of the media. These requests cover many topics including demographics, economic development, economic modeling and taxes.

Shopping and Retail

Businesses and commercial establishments in the Central Texas region generated more than \$11.9 billion in gross sales in 2006, rising to \$13 billion in 2007. Of the 2006 amount, more than \$4.3 billion (about 36 percent) were subject to state and local sales taxes. Of the 2007 amount, more than \$4.6 billion (about 35 percent) was taxed. State sales taxes levied in the region totaled \$355 million in 2006 and \$376 million in 2007.

Gross Sales and Sales Tax, Retail and Trade, Central Texas Region, 2006 and 2007

County	Gross Sales 2006	Gross Sales 2007	Amount Subject to State Tax 2006	Amount Subject to State Tax 2007	Sales Tax 2006	Sales Tax 2007
Bell	\$4,279,721,397	\$4,703,395,668	\$1,348,589,354	\$1,448,147,413	\$111,258,621	\$119,472,161
Brazos	2,074,397,535	2,284,715,560	976,557,672	1,074,793,433	80,566,007	88,670,458
McLennan	2,838,145,759	3,015,875,060	1,127,857,124	1,162,372,094	93,048,212	95,895,697
All Other Counties	2,714,337,922	2,952,760,981	831,946,272	876,062,018	70,441,237	72,135,161
Total	\$11,906,602,613	\$12,956,747,269	\$4,284,950,422	\$4,561,374,958	\$355,314,077	\$376,173,477

Source: Texas Comptroller of Public Accounts.

The Central Texas region had more than 43,516 retail employees in 2006 and more than 44,410 in 2007, earning total wages of more than \$982 million in 2006 and \$1.02 billion in 2007. Bell County had the highest number of retail jobs in 2007, followed by McLennan and Brazos counties. The annual average salary of the region’s retail employees was \$21,660 in 2006 and \$22,303 in 2007.

The Waco area offers a number of shopping options. In downtown Waco, the Shops of River Square Center boast 40,000 square feet of commercial space selling home furnishings, gifts, antiques, collectibles and clothing, as well as offering a hair salon and a café.²⁶ Waco’s Richland Mall offers a more traditional retail environment, with department stores like Bealls, Dillard’s and Sears. The mall includes 708,068 square feet of gross leasing area and is located at the intersection of Texas State Highway 6 and U.S. Highway 84, less than two miles from I-35. The average household income for Richland Mall shoppers, based on a 2007 estimate, is \$47,268.²⁷

Retail Employees and Wages, Central Texas Region, 2006 and 2007

County	Employees 2006	Total Wages 2006	Employees 2007	Total Wages 2007
Bell	12,960	\$292,477,501	13,508	\$311,716,385
Brazos	8,991	192,633,317	9,048	201,148,607
McLennan	11,494	254,817,472	11,473	261,083,696
All Other Counties	10,071	202,616,518	10,381	216,555,563
Total	43,516	\$942,544,808	44,410	\$990,504,251

Source: Texas Workforce Commission.



The Comptroller's office also can provide local demographic data, identify business clusters and provide maps of regional roadways and waterways. For assistance, please visit www.window.state.tx.us/texasedge or e-mail texas.edge@cpa.state.tx.us.

The Comptroller also provides local governments with information about tax-related programs and helps them identify opportunities to raise funds for economic development efforts through property, sales and franchise tax revenues, exemptions and credits. The agency also provides information on special assessments and other opportunities related to disaster relief.

The Comptroller's *Texas Ahead* web portal provides information on tax programs and

incentives, best practices and economic indicators, as well as reports and publications such as our new report on Texas workforce training, *Texas Works*. Texas EDGE, described above, also allows site visitors to build customized models using region-specific data of their choosing.

Finally, the Comptroller's State Energy Conservation Office (SECO) can help local governments slash their energy costs and adopt cost-effective clean energy technologies. SECO offers local governments a free preliminary energy audit of their facilities. These audits provide recommendations for reducing electricity consumption by improving the efficiency of heating and air conditioning systems and lighting.

Military Industry Profile

Much of Central Texas' economic and social diversity stems from Fort Hood's presence. One of the largest military installations in the world, the base encompasses 217,337 acres (or 340 square miles) of southwestern Bell and southeastern Coryell counties.

Fort Hood's economic importance to the Central Texas region and the state continues to grow. Today there are 53,000 soldiers assigned to Fort Hood, as well as 5,100 Department of Army civilians and 9,200 service and contract employees, making it the largest single site employer in Texas.²⁸ A Comptroller estimate shows Fort Hood contributed \$10.9 billion to the Texas economy in 2007, up 79 percent from \$6.1 billion in 2004.²⁹ This estimate includes \$4.4 billion in direct expenditures from Fort Hood, consisting of military and civilian pay, military construction projects, military contracts and federal aid.

Fort Hood's presence has brought capital improvement and infrastructure projects to Central Texas that provide local employment and bring in public resources. Capital investment projects on base include the

installation of state-of-the-art command and control facilities and a center for soldier development and education as well as large-scale barracks renovations. The base also contains the Army's largest and most sophisticated rail system, with more than \$100 million invested in rail and airlift capabilities since 2000.³⁰

Community growth on and near the base contributes to the area economy as well. Counting active soldiers, the base has a post population of more than 92,000 including nearly 18,000 on-post family members, with another 82,000 family members living off-post. The surrounding area hosts more than 245,000 military retirees and survivor family members.³¹

To accommodate these communities, the Texas Department of Transportation is investing \$161.7 million on a project to widen Highway 195 from Fort Hood to IH-35 in Georgetown. Several projects totaling \$350 million at or near the base are under way or in planning stages. Fort Hood is also working with Beaumont and Corpus Christi to make port improvements to support deployments.³²



Military Industry Profile (cont.)

Central Texas' military presence continues to supply the local economy with a large pool of dedicated and skilled workers as soldiers move from military service to civilian life. To aid this transition, each month the Army Career and Alumni Program (ACAP) assists more than 700 soldiers who complete their military service at Fort Hood. The ACAP provides former soldiers and their family with skills assessments, resume writing guidance, career counseling and job search training, among other services.³³

Local businesses and national companies recruit on base with up to 12 workshops per week. Biannual job fairs also bring employment opportunities; one recent fair attracted more than 150 companies from all sectors of the economy.³⁴

The base also draws national industries that otherwise might locate elsewhere. Defense contractors make up a large share of the region's employers, providing nearly 5,300 jobs. Top regional defense employers Weststar Aerospace & Defense Group and Science Applications International each employ more than 1,000 in the region.³⁵

Fort Hood is home to a significant portion of combat-ready air and ground forces, with one out of every 10 active duty soldiers in the U.S. Army stationed at Fort Hood. It is the only post capable of stationing and training two Armored Divisions and ranks first among the Army's 97 installations in terms of future capability.³⁶

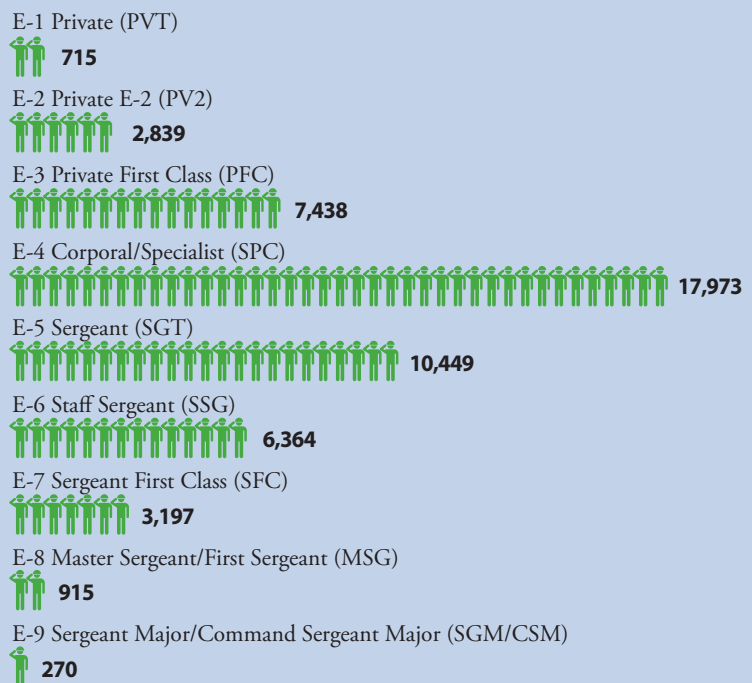
The base takes advantage of its unique size and geography to conduct realistic operational testing overseen by the Operational Test Command (OTC). The Western Maneuver Area offers a 20-mile stretch for training exercises, allowing a fully equipped heavy battalion to conduct live-fire exercises for weeks on end. While units simulate combat and prepare themselves for real world situations, the OTC carefully measures the performance of everything from equipment effectiveness to soldier decision-making. Fort Hood also has the Army's largest combat

aviation training area, with 15,900 square miles that allow helicopter crews to practice over realistic distances and terrains.³⁷

Units stationed at the base perform a broad range of Army functions, from divisions of infantry to surveillance and even finance. As more military families develop roots in the area, communities continue to grow, attracting businesses that seek to capitalize on a growing work force.

To help manage this growth, Fort Hood offers the Recovery Credit System, an incentive-based program that partners local landowners with Fort Hood to benefit both conservation efforts in Central Texas and Fort Hood's training flexibility. Qualifying landowners voluntarily enter into contracts for habitat management in exchange for technical guidance and additional means to maintain their farm or ranch. Specifically, this program enhances endangered golden-cheeked warbler habitat and assists towards recovery of the species. Fort Hood is able to use credits obtained through this program to increase the use of the land on the installation for military training.³⁸

Enlisted Soldiers at Fort Hood



Source: United States Army.



Ranching in Central Texas

Beef cattle ranching is an important contributor to the Central Texas economy. The industry's 219 establishments employed more than 870 workers and paid more than \$23 million in wages, for an average of \$26,800 per employee in 2007.³⁹ Ranching generates around \$1.5 billion in annual economic output and \$418 million in value-added activities for the region. Of the 3.25 million acres used for regional agriculture, nearly 24 percent is dedicated pastureland.⁴⁰

Throughout the region, ranchers conduct all stages of the beef production process. Cow-calf operations, often seen along highways and rural roads, raise calves for about a year, allowing free-range grazing on pastures in herds. After calves are weaned from their mothers, they are sold to stockers, feeders and backgrounders where calves continue grazing and begin receiving supplemental grains. Between the ages of 12 and 18 months, the cattle are sold to feedlots where they receive growth-promoting supplements and grain rations to build lean muscle. Cattle are considered ready for processing once they reach 18 to 22 months, or a weight of between 1,100 and 1,250 pounds.⁴¹

Central Texas ranchers can take advantage of small winter grains by sowing oats and rye grass in the fall that provide winter grazing for cattle. Falls and Hill County are both known as strong areas for winter grazing.⁴²

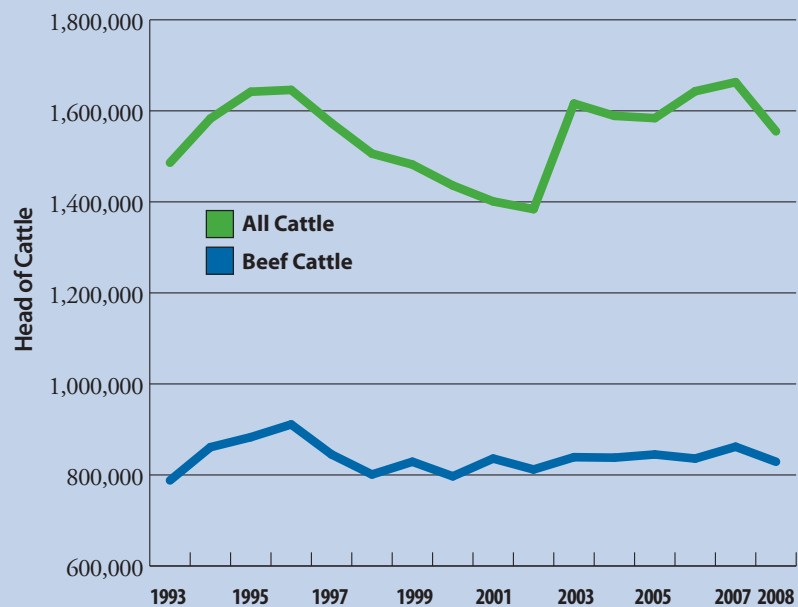
Ranchers produced more than 1.5 million head of cattle in 2008, comprised of 829,000 head of beef cattle with the remainder including calves, replacement heifers, and some bulls and dairy cows.⁴³ Although the Central Texas region was once home to many small dairy producers, most have followed statewide consolidation trends and shifted into other operations, as economies of scale favor large operations in the Panhandle, near Erath and Comanche

counties, or near Sulfur Springs. Farms and ranches must also compete with urban growth, as developers look to agricultural land for residential and commercial expansion, or to develop recreational and hunting ranches.

Central Texas cattle production rose in the early 1990's, peaking in 1996. Production levels then dropped off through the end of the decade following the end of a natural cattle cycle, as low prices led to inventory selloffs and dry weather reduced grass growth. Average cattle production cycles last around 10 years and occur largely from the lag between ranch decision making and the biological process of cattle. Ranchers base current breeding decisions on cattle price expectations roughly two years ahead, along with other expectations like fuel costs and grass availability. When cattle reach the processing stage two years later, ranchers adjust inventories with current prices. This two year discrepancy leads to gradual inventory buildups and liquidations.⁴⁴

Central Texas employs 7.3 percent of the state's beef cattle workers and is home to nearly 8.8 percent of the state's beef cattle ranching establishments.⁴⁵

Cattle Production, 1993-2008



Source: U.S. Department of Agriculture, National Agricultural Statistics Service.



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