



Economic Development

Desert landscapes characterize the Upper Rio Grande region. Located on the northern end of the Chihuahuan desert, the region's open spaces fill vast areas between the Davis, Franklin, Guadalupe and Chisos mountains. Despite its dry climate and sparse population, the region has developed a unique industrial mix that relies on international trade and its strategic location between the U.S. coasts.

The military has played a large role in the area's economy since the early years of Texas statehood. Military outposts built in the El Paso

area during the Mexican-American War spurred the city's development and led to the establishment of Fort Bliss in 1848.¹ Today, Fort Bliss covers 1.1 million acres and hosts an active force of more than 14,000 with a supporting community population exceeding 120,000.²

Manufacturing is a traditional pillar of the regional economy. Jobs in the production of goods such as vacuum cleaners and men's footwear, as well as in copper refining, continue to outpace national counterparts. Service industries that support manufacturing, such as wholesaling and transportation, have evolved to become important industries as well.

Another traditional pillar of the region's economy is the agriculture industry. Sixty-one percent of the land and 71 percent of the water in the region are used for either farming or ranching.

Fort Bliss covers 1.1 million acres and hosts an active force of more than 14,000 with a supporting community population exceeding 120,000.



Groundbreaking ceremony for the First Light Federal Credit Union and United Services Organizations facility at Fort Bliss

PHOTO: Virginia Reza, Fort Bliss Monitor



Fort Bliss

The U.S. Army base now called Fort Bliss began as “The Post Opposite El Paso,” established in 1848. In 1890, the post moved to its present-day site on the La Noria Mesa overlooking El Paso.³

In 2005, Congress enacted Base Realignment and Closure decisions intended to transform and reshape the U.S. Defense Department’s infrastructure. This realignment process eventually will bring more than 20,000 new troops to Fort Bliss, creating a tremendous positive impact on the El Paso economy. Some of these additional troops have already arrived, with the remainder scheduled to arrive by 2013. About 53,000 family members will accompany them.

The diverse array of missions at Fort Bliss includes heavy and light infantry brigades, combat aviation, missile defense, field artillery and multiple support functions. The expansion of Fort Bliss represents the largest net gain of any military installation in the U.S., almost tripling in size from about 14,000 to more than 37,000 soldiers. This growth will also create a projected 24,000 civilian jobs in the El Paso area. By 2013, the installation’s gross annual payroll will rise to nearly \$1.78 billion, from \$478 million in 2005, and the Army will invest nearly \$5 billion in new facilities and infrastructure.

By 2013, Fort Bliss will be transformed into one of the most technically advanced army installations in the world, employing state-of-the-art technology from different military branches. Fort Bliss is part of a two-state regional military complex of more than 7,100 square miles (4.1 million acres) consisting of the Texas installation and New Mexico’s White Sands Missile Range and Holloman Air Force Base. Together, these facilities comprise the largest contiguous land area owned by the U.S. Department of Defense.

Most significantly, Fort Bliss has been selected as the site for integrated field testing of the Army’s newest technologies. The Future Combat System program, the Army’s primary modernization program, has transformed Fort Bliss into the premiere installation for development and testing of future technologies.⁴

Fort Bliss will now house the entire First Armored Division with its division headquarters, as well as a Combat Aviation Brigade, a Fires Brigade, a Sustainment Brigade and other smaller units. The Army Evaluation Task Force, which tests and evaluates new technologies before they are introduced to the entire Army, will be based there as well.⁵

As with the rest of the nation, the region’s future growth will depend less on its traditional goods-producing industries and more on service jobs, such as professional and business services.

Exhibit 2 shows employment projections for the Upper Rio Grande region through 2013, including El Paso, the region’s sole metropolitan statistical area (MSA), and the five predominately rural 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 that of the state as a whole. The Comptroller expects regional employment growth to

accelerate from 2009 to 2011 with additional troops stationed at Ft. Bliss. Employment in the El Paso MSA should see similar growth, rising by 1.7 percent in 2009 and 2.9 percent in 2010. After a slight decline in 2008, job growth in the non-metro counties should resume in 2009, with growth accelerating through 2013.

Economic Trends

In 2008, employers in the Upper Rio Grande region provided a total of 305,657 jobs. **Exhibit 3** provides a detailed picture of projected employment growth in the region, displaying growth indices for various

(text continued on Page 8)



Exhibit 2

Upper Rio Grande Region Employment Indices, 2003-2013

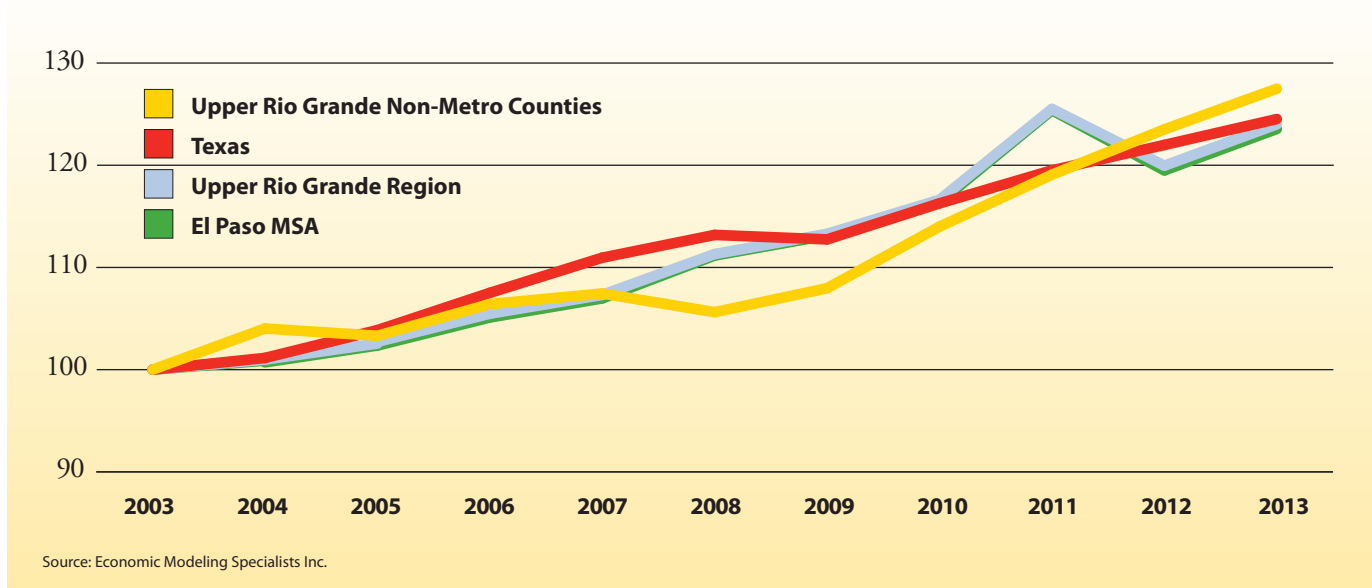
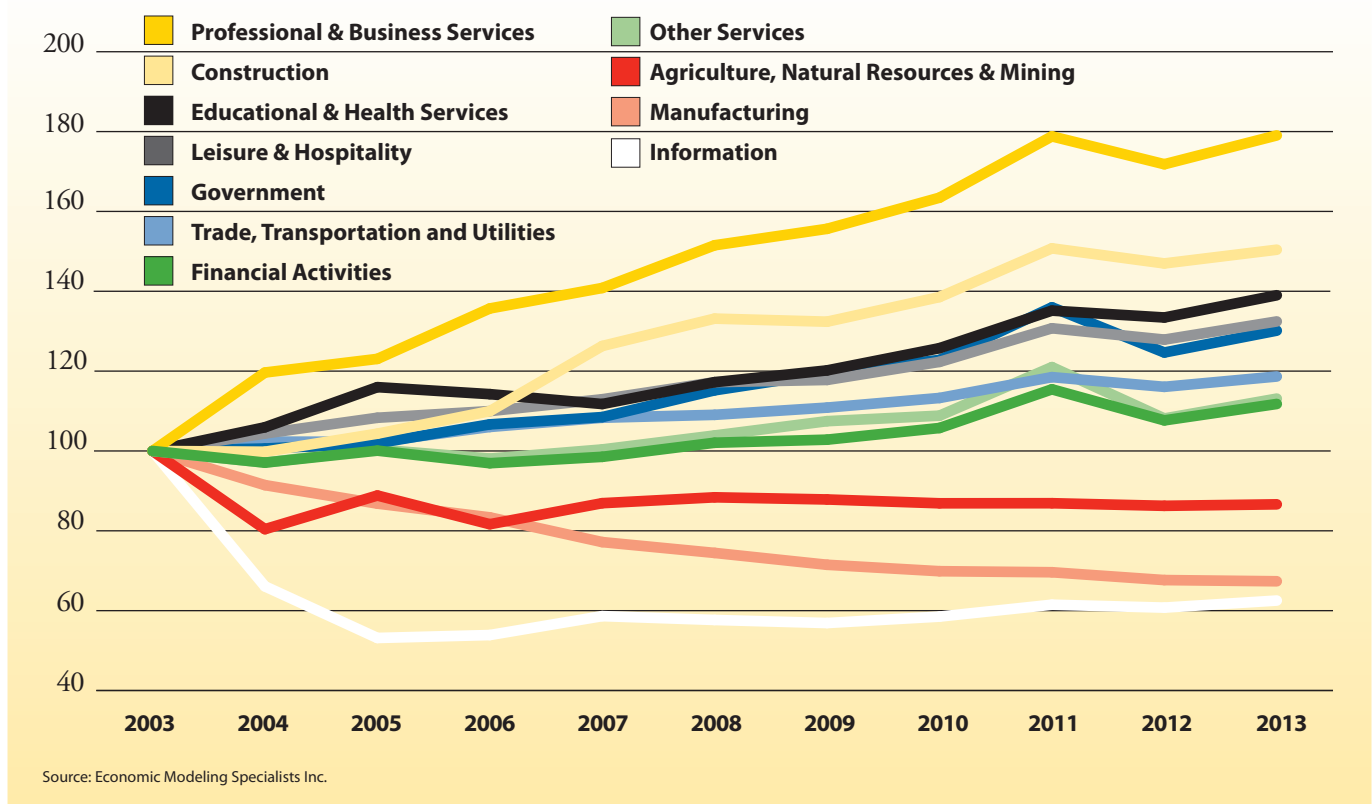


Exhibit 3

Industry Employment Projection Indices, Upper Rio Grande Region, 2003-2013





industries in the region, using 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).⁶

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 supersectors.

The goods-producing group comprises three supersectors — agriculture, natural resources and mining, construction and manufacturing. The service-producing group comprises seven supersectors including education and health, finance, government, information, leisure and hospitality, other services and trade, transportation and utilities.

Eight of the 11 supersectors in **Exhibit 3** should show positive growth between 2003 and 2013, with exceptional growth in professional and business services. In all, Upper Rio Grande employment should rise by 24 percent over this period, despite the current national downturn.

Of the eight supersectors projected to add jobs by the period’s end, two will show steady expansion. Government employment is expected to rise each year except 2012, with nearly 95,000 jobs projected by 2013. This will represent the largest share of the region’s employment, at more than 27 percent.

The professional and business services sector is also expected to add jobs each year except in 2012, led by strong growth in telemarketing bureaus. These businesses added 3,200 jobs to the region in 2004 alone, and should finish the 2003–2013 period with at least 7,400 jobs. Collection agency growth should make a

significant contribution as well, after jumping from 123 jobs in 2004 to 1,127 jobs in 2005. Both industries are concentrated in the El Paso area, attracted by its strategic location for the e-commerce and telecommunications industries (offering easy access to an extensive network of fiber-optic lines), in addition to a young and skilled bilingual work force.⁷ As a whole, the professional and business service supersector should increase employment by 79 percent from 2003 to 2013.

Despite various industry downturns during the period, other supersectors show strong projected job growth through 2013. Expected growth in the construction supersector — by nearly 50 percent — trails only that for professional and business services, despite a slowdown in 2004 and the current economic downturn. Employment in commercial building construction and non-residential drywall installation should account for 33.5 percent of all construction jobs added through 2013.

Educational and health services employment should rise by 39 percent through 2013, driven by positive growth in home health care services. Home health care will contribute more jobs to the supersector than any other industry, representing 40 percent of projected regional job creation by the period’s end. The next strongest health-related industry in terms of expected growth is physicians’ offices, accounting for 13.5 percent of the projected job growth through 2013. Educational industries should see more modest growth.

Other regional industry sectors anticipating positive job growth rates over the period include leisure and hospitality (32 percent), trade, transportation and utilities (19 percent), other services (13 percent) and financial activities (12 percent).⁸

Government employment is expected to rise each year except 2012, with nearly 95,000 jobs projected by 2013. This will represent the largest share of the region’s economy, at more than 27 percent.



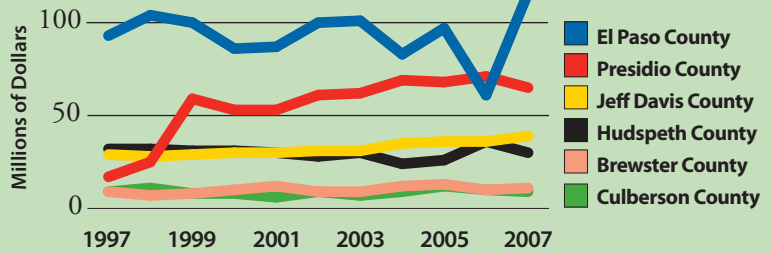
Upper Rio Grande Agriculture

Agriculture plays an important role in the Upper Rio Grande economy. Crops dominate regional production, accounting for 83 percent of agricultural value in 2007, versus 15 percent for livestock, and 2 percent for other agricultural products.⁹ In that year, the region’s 1,225 farms produced goods worth \$271 million, including \$224 million from crops and \$40 million from livestock.¹⁰ The economic activities related to agriculture in the Upper Rio Grande directly or indirectly contributed just over \$529 million to the Texas economy, an economic impact of nearly twice the sector’s size.¹¹

Land devoted to agriculture covers 61 percent of the region’s total acreage. The average farm in the region spans more than 6,900 acres, with county averages ranging from 25,000 acres per farm in Culberson County to 286 acres in El Paso County.¹² Despite its smaller farms, El Paso County leads the Upper Rio Grande in crop and total production, generating 51 percent of the region’s crop value and 43 percent of its total agricultural value.¹³

Recent improvements in pecan farming practices have boosted crop production in El Paso County, which is also supported by strong cotton and vegetable yields. Presidio and Jeff Davis counties both continue to benefit from large hydroponic tomato greenhouses established in the late 1990s.¹⁴ Vegetable production in Presidio County rose dramatically from \$7.1 million in 1997 to \$53 million in 1999, a level sustained through today. Similarly, Jeff Davis County had no significant vegetable crop until 1997, when the industry emerged with \$21 million in production. In addition, Jeff Davis County leads the region in livestock production, contributing 34 percent of the region’s livestock value, at \$13.4 million.¹⁵

Total Agricultural Cash Value



Source: Texas A&M Agrilife Extension Service.



PHOTO: Village Farms

Hydroponic Tomato Presidio Greenhouse facility in Marfa, Texas



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 a pool of skilled laborers with valuable knowledge and information.¹⁶ The benefits that result from high industry concentrations give a region its competitive edge.¹⁷

One tool that can be used to identify industry concentration is the “location quotient.” The location quotient identifies industry concentrations by comparing the share of a region’s economy attributable to a specific industry 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 the Upper Rio Grande region with location quotients

(text continued on Page 13)

Exhibit 4

Upper Rio Grande Region’s Largest Industry Location Quotients, 2008

Construction

NAICS Code	Description	2008 Jobs	2008 Location Quotient
238132	Nonresidential framing contractors	152	3.16
238312	Nonresidential drywall contractors	938	2.37
236210	Industrial building construction	835	2.15
238192	Other nonresidential exterior contractors	161	2.11

Manufacturing

NAICS Code	Description	2008 Jobs	2008 Location Quotient
335212	Household vacuum cleaner manufacturing	849	88.24
316213	Men’s nonathletic footwear manufacturing	778	53.81
331411	Primary smelting and refining of copper	226	50.78
334415	Electronic resistor manufacturing	459	42.66
315211	Men’s cut and sew apparel contractors	508	15.09
315224	Men’s pants, except work pants, manufacturing	87	13.99



Exhibit 4 (cont.)

Upper Rio Grande Region's Largest Industry Location Quotients, 2008

NAICS Code	Description	2008 Jobs	2008 Location Quotient
313221	Narrow fabric mills	243	13.74
332114	Custom roll forming	180	13.24
315239	Other women's outerwear manufacturing	475	12.56
327999	Miscellaneous nonmetallic mineral products	362	12.23
327124	Clay refractory manufacturing	134	10.10
313320	Fabric coating mills	158	8.35
311911	Roasted nuts and peanut butter manufacturing	218	8.21
311422	Specialty canning	195	7.99
331422	Copper wire, except mechanical, drawing	316	7.97
335211	Electric housewares and household fan manufacturing	181	7.38
311830	Tortilla manufacturing	255	6.46
311514	Dry, condensed, and evaporated dairy products	204	6.37
314911	Textile bag mills	86	5.05
332323	Ornamental and architectural metal work manufacturing	414	4.56
331319	Other aluminum rolling and drawing	70	4.51
339994	Broom, brush, and mop manufacturing	96	4.29
333516	Rolling mill machinery and equipment manufacturing	36	4.02
316999	All other leather good manufacturing	47	3.94
337124	Metal household furniture manufacturing	68	3.84
336322	Other motor vehicle electric equipment manufacturing	475	3.73
327122	Ceramic wall and floor tile manufacturing	64	3.72
326121	Unlaminated plastics profile shape manufacturing	195	3.67
333314	Optical instrument and lens manufacturing	184	3.64
333112	Lawn and garden equipment manufacturing	149	3.48
327320	Ready-mix concrete manufacturing	762	3.12
315999	All other accessory and apparel manufacturing	46	2.92
331111	Iron and steel mills	584	2.78
322211	Corrugated and solid fiber box manufacturing	614	2.62
336415	Space vehicle propulsion units and parts manufacturing	83	2.57
332912	Fluid power valve and hose fitting manufacturing	188	2.37
322212	Folding paperboard box manufacturing	164	2.36
327331	Concrete block and brick manufacturing	116	2.31

Trade, Transportation and Utilities

NAICS Code	Description	2008 Jobs	2008 Location Quotient
423620	Electric appliance merchant wholesalers	523	7.68
488999	All other support activities for transport	136	6.92
485210	Interurban and rural bus transportation	203	5.26
221111	Hydroelectric power generation	378	4.53
454111	Electronic shopping	736	4.14
423930	Recyclable material merchant wholesalers	973	3.84
424320	Men's and boys' clothing merchant wholesalers	242	3.57
484121	General freight trucking, long-distance TL	3,691	3.16



Exhibit 4 (cont.)

Upper Rio Grande Region's Largest Industry Location Quotients, 2008

NAICS Code	Description	2008 Jobs	2008 Location Quotient
484110	General freight trucking, local	1,474	2.97
488510	Freight transportation arrangement	1,204	2.96
445230	Fruit and vegetable markets	231	2.75
485113	Bus and other motor vehicle transit systems	178	2.72
448210	Shoe stores	936	2.22
454210	Vending machine operators	221	2.12
452910	Warehouse clubs and supercenters	5,067	2.06
448320	Luggage and leather goods stores	68	2.00

Financial Activities

NAICS Code	Description	2008 Jobs	2008 Location Quotient
523130	Commodity contracts dealing	99	3.89
532120	Truck, trailer, and RV rental and leasing	487	3.72
522130	Credit unions	1,404	2.71
522291	Consumer lending	638	2.48

Professional and Business Services

NAICS Code	Description	2008 Jobs	2008 Location Quotient
561422	Telemarketing bureaus	5,965	7.50
561440	Collection agencies	1,756	5.30
541910	Marketing research and public opinion polling	662	2.69
541840	Media representatives	186	2.66

Educational and Health Services

NAICS Code	Description	2008 Jobs	2008 Location Quotient
621610	Home health care services	7,697	3.66
611410	Business and secretarial schools	99	3.39
611519	Other technical and trade schools	459	3.11
624310	Vocational rehabilitation services	1,974	2.84
621491	HMO medical centers	420	2.60
621991	Blood and organ banks	353	2.39

Leisure and Hospitality

NAICS Code	Description	2008 Jobs	2008 Location Quotient
722212	Cafeterias	875	3.02

Other Services

NAICS Code	Description	2008 Jobs	2008 Location Quotient
811192	Car washes	705	2.19

Government

NAICS Code	Description	2008 Jobs	2008 Location Quotient
912000	Federal government, military	17,285	3.53
911000	Federal government, civilian, except postal service	10,169	2.24

Source: Economic Modeling Specialists Inc.



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.¹⁸

The manufacturing of household vacuum cleaners has the region's highest location quotient, with a measure of 88.24. In other words, the industry's level of employment in the Upper Rio Grande region is more than 88 times larger than the nation's share.

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 Upper Rio Grande 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.

(text continued on Page 16)

Indian Cliffs Ranch

In 1968, El Paso County gave its Hueco Tanks property to Texas for development as a state park, forcing renters of the land to relocate. Dieter Gerzymisch was running a horse rental operation at Hueco Tanks and decided to stay in the area, purchasing land along the San Antonio Stagecoach trail, about 35 miles southeast of El Paso near IH-10. The property, called Indian Cliffs Ranch, contains the ruins of an old stagecoach stop on the trail where passengers and mail traveled to western destinations.

In 1973, Gerzymisch opened a restaurant on the ranch called the Cattleman's Steakhouse. Additions to the original building have added 180 seats, as well as banquet facilities for up to 4,000 guests. The steaks are famous and have been voted best in El Paso by *El Paso Times* readers. They also serve traditional trail food such as ranch-style beans, corn on the cob and green chile strips. Gerzymisch continues to personally oversee all aspects of the business from selecting the meat to food preparation to customer service.

Indian Cliffs Ranch also offers numerous activities for children. Every Sunday, the ranch runs hay rides throughout the day. In addition, the ranch has a maze and playground for all ages, as well as a children's petting zoo.¹⁹

Indian Cliffs Ranch has hosted a number of movie productions, including *Resurrection*, *The Border*, *Lone Wolf McQuade*, *Death of an Angel*, *Extreme Prejudice*, *Courage Under Fire*, *On the Border*, *The Jessica Lynch Story*, *Glory Road* and *The Day After Tomorrow*.²⁰

The ranch successfully combines a unique Old West experience with high-quality dining to attract visitors from the El Paso area and beyond.



Exhibit 5

Most Competitive Industries, Upper Rio Grande Region, 2003-2008

Rank	Description	Super Sector	National Growth Effect	Industry Mix Effect	Regional Competitive Effect	Total Jobs Added Since 2003
1	Telephone call centers	Professional and Business Services	74	48	4,446	4,568
2	Federal government, military	Government	621	-875	3,896	3,642
3	Local government	Government	2,164	309	1,941	4,414
4	Full-service restaurants	Leisure and Hospitality	415	888	1,523	2,825
5	Federal government, civilian, except postal service	Government	407	349	1,431	2,187
6	Residential building construction	Construction	48	-11	1,039	1,076
7	Computer systems design and related services	Professional and Business Services	26	100	965	1,091
8	Wired telecommunications carriers	Information	69	-460	794	403
9	Services for the elderly and disabled	Educational and Health Services	6	73	684	763
10	Collection agencies	Professional and Business Services	53	18	640	711
11	Department stores	Trade, Transportation and Utilities	168	-501	638	304
12	Marketing research and public opinion polling	Professional and Business Services	2	-2	631	630
13	Drywall and insulation contractors	Construction	28	-25	530	534
14	Office administrative services	Professional and Business Services	25	164	516	704
15	Home centers	Trade, Transportation and Utilities	28	78	496	602
16	General freight trucking, local	Trade, Transportation and Utilities	51	-68	490	473
17	Metal valve manufacturing	Manufacturing	2	-6	475	471
18	Engineering services	Professional and Business Services	37	115	425	578
19	General freight trucking, long-distance	Trade, Transportation and Utilities	188	16	417	620
20	New car dealers	Trade, Transportation and Utilities	148	-343	408	212
21	Iron and steel mills and ferroalloy manufacturing	Manufacturing	10	-24	399	384
22	Other outpatient care centers	Educational and Health Services	22	124	387	533
23	Highway, street, and bridge construction	Construction	29	-84	355	300
24	Wireless telecommunications carriers	Information	17	-21	351	347
25	Truck, trailer, and RV rental and leasing	Financial Activities	7	-9	344	342



Exhibit 5 (cont.)

Most Competitive Industries, Upper Rio Grande Region, 2003-2008

Rank	Description	Super Sector	National Growth Effect	Industry Mix Effect	Regional Competitive Effect	Total Jobs Added Since 2003
26	General warehousing and storage	Trade, Transportation and Utilities	43	223	341	607
27	All other nonmetallic mineral products manufacturing	Manufacturing	1	3	339	343
28	Shoe stores	Trade, Transportation and Utilities	30	1	309	341
29	Offices of physicians	Educational and Health Services	180	351	296	826
30	Community care facilities for the elderly	Educational and Health Services	19	84	289	393
31	Plumbing and HVAC contractors	Construction	89	233	283	605
32	Drinking places, alcoholic beverages	Leisure and Hospitality	50	-139	279	191
33	Other nondepository credit intermediation	Financial Activities	37	-39	260	258
34	Offices of real estate agents and brokers	Financial Activities	16	25	253	294
35	Hardware stores	Trade, Transportation and Utilities	12	-34	244	222
36	Freight transportation arrangement	Trade, Transportation and Utilities	44	53	242	339
37	Land subdivision	Construction	6	-11	240	234
38	Commercial building construction	Construction	77	21	238	337
39	Electric appliance merchant wholesalers	Trade, Transportation and Utilities	14	-11	238	242
40	Plastics pipe, fittings, and profile shapes	Manufacturing	3	-7	234	230
41	State government	Government	448	-96	230	582
42	Family clothing stores	Trade, Transportation and Utilities	61	201	229	491
43	Accounting and bookkeeping services	Professional and Business Services	67	113	229	410
44	Credit unions	Financial Activities	49	159	226	435
45	Medical equipment merchant wholesalers	Trade, Transportation and Utilities	10	29	223	262
46	Radio broadcasting	Information	9	-14	223	218
47	Hardware manufacturing	Manufacturing	0	-1	209	208
48	Pharmacies and drug stores	Trade, Transportation and Utilities	52	34	208	295
49	Real estate property managers	Financial Activities	22	61	208	291
50	Framing contractors	Construction	5	-23	207	190

Source: Economic Modeling Specialists Inc.



The highest-ranked industry is telephone call centers, which generated 4,568 jobs between 2002 and 2008. Local factors (from the competitiveness effect) contributed 4,446 jobs, or 97 percent of this increase. The remaining growth was due to a growing national economy and industry growth outpacing overall national growth.

Another, similar example is the computer systems design industry, for which local conditions contributed 88 percent of job growth. Industries such as these that have favorable local conditions (such as an extensive infrastructure or favorable government policies) combined with a growing national industry have the highest potential for future 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. But what types of occupations can Upper Rio Grande residents 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

(text continued on Page 25)

Exhibit 6

“Good Jobs,” Upper Rio Grande Region, 2008-2013

Doctoral and First Professional Degrees

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	Median 2008 Annual Earnings
Physicians and surgeons	1,222	1,370	258	148	110	\$183,093
Dentists, general	74	79	12	5	7	171,619
Podiatrists	14	15	3	1	2	103,124
Pharmacists	479	593	159	114	45	102,609
Lawyers	768	846	153	78	75	93,091
Optometrists	39	45	9	6	3	87,591
Veterinarians	65	78	20	13	7	84,810
Chiropractors	42	44	4	2	2	71,565
Computer and information scientists, research	20	24	7	4	3	70,225
Audiologists	15	17	3	2	1	62,789
Medical scientists, except epidemiologists	122	148	46	26	20	60,832
Postsecondary teachers	4,459	5,358	1,280	899	381	54,626
Clinical, counseling, and school psychologists	65	74	14	9	5	54,529
Total	7,384	8,691	1,968	1,307	661	
Weighted Average of Median Annual Earnings						\$84,961



Exhibit 6 (cont.)

“Good Jobs,” Upper Rio Grande Region, 2008-2013**Master’s Degrees**

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	Median 2008 Annual Earnings
Physical therapists	324	400	96	76	20	\$80,608
Occupational therapists	240	289	67	49	18	80,237
Geoscientists, except hydrologists and geographers	29	34	9	5	4	78,895
Operations research analysts	65	72	14	7	7	77,703
Urban and regional planners	16	18	4	2	2	68,557
Statisticians	12	13	3	1	2	66,023
Museum Technicians and Conservators	17	18	5	1	4	65,920
Instructional coordinators	258	307	67	49	18	65,858
Speech-language pathologists	360	411	86	51	35	62,521
Social scientists and related workers, all other	25	27	6	2	4	60,811
Counselors, all other	293	328	64	35	29	58,607
Educational, vocational, and school counselors	850	958	193	108	85	54,569
Librarians	426	466	98	40	58	48,760
Environmental scientists and specialists, including health	92	107	27	15	12	43,363
Curators	20	23	7	3	4	42,770
Total	3,027	3,471	746	444	302	
Weighted Average of Median Annual Earnings						\$61,419

Degree Plus Work Experience

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	Median 2008 Annual Earnings
Chief executives	224	238	44	14	30	\$165,851
Natural sciences managers	20	22	4	2	2	122,405
Engineering managers	130	140	23	10	13	107,141
Computer and information systems managers	282	320	61	38	23	95,234
Actuaries	15	17	5	2	3	89,116
Compensation and benefits managers	53	59	11	6	5	80,443
Administrative services managers	538	599	132	61	71	79,557
Advertising and promotions managers	11	11	1	0	1	79,516
Training and development managers	14	16	3	2	1	79,069
Marketing managers	192	212	41	20	21	75,787



Exhibit 6 (cont.)

“Good Jobs,” Upper Rio Grande Region, 2008-2013

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	Median 2008 Annual Earnings
Education administrators, elementary and secondary school	719	801	183	82	101	74,945
Sales managers	360	391	70	31	39	73,707
Human resources managers, all other	14	15	2	1	1	72,778
Purchasing managers	52	53	8	1	7	67,527
Medical and health services managers	386	439	90	53	37	67,012
Financial managers	573	624	93	51	42	65,982
General and operations managers	3,553	3,773	647	220	427	64,622
Public relations managers	16	18	4	2	2	59,257
Arbitrators, mediators, and conciliators	21	24	5	3	2	56,274
Management analysts	307	355	75	48	27	53,478
Administrative law judges, adjudicators, and hearing officers	38	41	7	3	4	52,200
Producers and directors	118	127	26	9	17	51,376
Art directors	13	14	3	1	2	50,833
Vocational education teachers, secondary school	463	489	105	26	79	47,484
Broadcast news analysts	39	43	10	4	6	40,335
Education administrators, postsecondary	150	176	47	26	21	37,792
Education administrators, all other	64	73	18	9	9	37,471
Farm, ranch, and other agricultural managers	209	199	-2	-10	8	37,410
Total	8,574	9,289	1,716	715	1,001	
Weighted Average of Median Annual Earnings						\$68,841

Bachelor’s Degree

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	Median 2008 Annual Earnings
Personal financial advisors	90	104	18	14	4	\$113,485
Petroleum engineers	90	92	14	2	12	98,241
Orthotists and prosthetists	17	19	3	2	1	97,912
Aerospace engineers	37	39	6	2	4	91,485
Materials scientists	13	16	5	3	2	91,382
Computer software engineers, systems software	359	437	105	78	27	82,750
Physician assistants	50	59	12	9	3	77,827
Surveyors	47	54	14	7	7	76,529
Sales engineers	23	24	4	1	3	75,890



Exhibit 6 (cont.)

“Good Jobs,” Upper Rio Grande Region, 2008-2013

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	Median 2008 Annual Earnings
Chemical engineers	13	14	3	1	2	70,988
Electronics engineers, except computer	157	172	34	15	19	70,225
Health diagnosing and treating practitioners, all other	68	73	11	5	6	68,948
Engineers, all other	110	118	15	8	7	68,866
Health and safety engineers, except mining safety engineers and inspectors	20	22	4	2	2	68,722
Computer software engineers, applications	74	96	28	22	6	67,650
Animal scientists	20	23	6	3	3	63,881
Chemists	27	29	6	2	4	63,098
Computer systems analysts	1,200	1434	397	234	163	62,809
Architects, except landscape and naval	152	172	35	20	15	60,255
Securities, commodities, and financial services sales agents	208	224	42	16	26	58,792
Electrical engineers	254	272	48	18	30	58,545
Industrial engineers	154	171	36	17	19	58,216
Budget analysts	144	157	30	13	17	57,144
Network systems and data communications analysts	589	785	259	196	63	57,062
Civil engineers	352	400	95	48	47	56,815
Social workers, all other	111	124	25	13	12	56,053
Conservation scientists	13	15	4	2	2	55,929
Mechanical engineers	119	123	17	4	13	55,764
Financial analysts	82	95	15	13	2	54,940
Biological scientists, all other	74	79	13	5	8	54,796
Credit analysts	91	91	17	0	17	53,601
Financial examiners	12	13	2	1	1	52,865
Business operation specialists, all other	1,821	2,106	385	285	100	52,406
Materials engineers	63	66	10	3	7	51,974
Logisticians	200	226	41	26	15	51,747
Construction managers	505	586	120	81	39	51,047
Occupational health and safety specialists	88	96	16	8	8	50,964
Database administrators	166	201	44	35	9	50,841
Commercial and industrial designers	18	17	1	-1	2	49,275
Human resources, training, and labor relations specialists, all other	169	196	46	27	19	49,172
Network and computer systems administrators	398	468	116	70	46	48,946



Exhibit 6 (cont.)

“Good Jobs,” Upper Rio Grande Region, 2008-2013

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	Median 2008 Annual Earnings
Medical and clinical laboratory technologists	323	348	50	25	25	48,925
Therapists, all other	15	17	3	2	1	48,266
Accountants and auditors	1,503	1,652	279	149	130	48,122
Insurance underwriters	75	86	21	11	10	47,710
Writers and authors	45	50	9	5	4	47,689
Loan officers	421	445	46	24	22	47,112
Tax examiners, collectors, and revenue agents	84	93	20	9	11	47,030
Adult literacy, remedial education, and GED teachers and instructors	142	162	28	20	8	46,762
Compensation, benefits, and job analysis specialists	244	277	60	33	27	46,535
Financial specialists, all other	85	92	18	7	11	46,268
Set and exhibit designers	21	23	5	2	3	46,206
Secondary school teachers, except special and vocational education	3,693	4,074	933	381	552	46,152
Dietitians and nutritionists	84	92	19	8	11	45,753
Elementary school teachers, except special education	5,961	6,814	1511	853	658	45,345
Training and development specialists	214	252	62	38	24	45,238
Middle school teachers, except special and vocational education	2,907	3,289	702	382	320	44,834
Technical writers	78	89	23	11	12	44,414
Law clerks	44	47	7	3	4	44,187
Kindergarten teachers, except special education	632	730	151	98	53	44,071
Special education teachers, secondary school	231	258	53	27	26	43,434
Medical and public health social workers	243	290	73	47	26	42,869
Special education teachers, preschool, kindergarten, and elementary school	483	565	137	82	55	42,658
Multi-media artists and animators	66	83	25	17	8	42,580
Environmental engineers	100	115	30	15	15	42,271
Legal support workers, all other	34	37	6	3	3	42,137
Meeting and convention planners	33	36	6	3	3	41,921
Special education teachers, middle school	188	217	50	29	21	41,573
Social and community service managers	214	237	44	23	21	40,809
Computer programmers	618	648	108	30	78	40,397
Farm and home management advisors	10	11	2	1	1	40,252



Exhibit 6 (cont.)

“Good Jobs,” Upper Rio Grande Region, 2008-2013

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	Median 2008 Annual Earnings
Insurance sales agents	497	582	140	85	55	38,254
Film and video editors	18	16	0	-2	2	38,131
Market research analysts	330	373	54	43	11	38,089
Probation officers and correctional treatment specialists	320	366	65	46	19	37,760
Atmospheric and space scientists	13	14	3	1	2	37,513
Total	28,167	31,988	6,845	3,821	3,024	
Weighted Average of Median Annual Earnings						\$49,033

Associate Degree

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	Median 2008 Annual Earnings
Radiation therapists	34	38	7	4	3	\$88,209
Nuclear medicine technologists	43	46	6	3	3	71,152
Computer specialists, all other	143	161	37	18	19	62,006
Social science research assistants	10	13	5	3	2	56,094
Occupational therapist assistants	54	67	17	13	4	55,002
Diagnostic medical sonographers	66	72	10	6	4	54,858
Registered nurses	4,800	5,388	987	588	399	54,178
Funeral directors	23	26	6	3	3	52,983
Dental hygienists	151	176	40	25	15	52,860
Forensic science technicians	15	18	6	3	3	51,294
Fashion designers	13	12	1	-1	2	50,964
Mechanical engineering technicians	43	45	6	2	4	50,429
Physical therapist assistants	188	240	64	52	12	46,453
Electrical and electronic engineering technicians	229	241	34	12	22	45,402
Chemical technicians	56	61	14	5	9	45,176
Fish and game wardens	16	17	3	1	2	44,414
Respiratory therapists	197	216	34	19	15	44,063
Radiologic technologists and technicians	330	355	47	25	22	43,878
Geological and petroleum technicians	36	44	15	8	7	43,734
Respiratory therapy technicians	95	92	11	-3	14	43,610
Biological technicians	38	43	12	5	7	43,425
Industrial engineering technicians	82	83	9	1	8	42,045
Cardiovascular technologists and technicians	100	111	18	11	7	41,921
Engineering technicians, except drafters, all other	88	94	15	6	9	39,284



Exhibit 6 (cont.)

“Good Jobs,” Upper Rio Grande Region, 2008-2013

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	Median 2008 Annual Earnings
Interior designers	46	49	9	3	6	38,604
Paralegals and legal assistants	376	427	77	51	26	38,357
Computer support specialists	1,057	1,225	336	168	168	38,028
Total	8,329	9,360	1,826	1,031	795	
Weighted Average of Median Annual Earnings						\$49,864

Postsecondary Vocational Award

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	Median 2008 Annual Earnings
Commercial pilots	27	34	11	7	4	\$69,952
Court reporters	130	146	27	16	11	57,474
Electrical and electronics repairers, powerhouse, substation, and relay	48	41	1	-7	8	50,017
Aircraft mechanics and service technicians	212	219	18	7	11	46,762
Avionics technicians	59	60	4	1	3	45,444
Library technicians	114	129	43	15	28	43,033
Appraisers and assessors of real estate	57	66	15	9	6	41,715
Licensed practical and licensed vocational nurses	1,383	1,534	338	151	187	38,749
Total	2,030	2,229	457	199	258	
Weighted Average of Median Annual Earnings						\$41,985

Long-term on-the-job training

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	Median 2008 Annual Earnings
Air traffic controllers	33	38	10	5	5	\$82,750
Elevator installers and repairers	100	96	8	-4	12	60,543
Compliance officers, except agriculture, construction, health and safety, and transportation	1,721	1,854	236	133	103	55,332
Petroleum pump system operators, refinery operators, and gaugers	177	170	29	-7	36	55,332
Chemical plant and system operators	64	71	20	7	13	50,573
Coaches and scouts	360	405	91	45	46	49,852
Transit and railroad police	24	26	5	2	3	49,399
Telecommunications equipment installers and repairers, except line installers	890	964	181	74	107	48,657



Exhibit 6 (cont.)

“Good Jobs,” Upper Rio Grande Region, 2008-2013

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	Median 2008 Annual Earnings
Power distributors and dispatchers	14	13	2	-1	3	47,112
Gas plant operators	72	57	-3	-15	12	46,288
Electrical power-line installers and repairers	52	51	7	-1	8	45,732
Claims adjusters, examiners, and investigators	466	516	111	50	61	44,723
Boilermakers	27	31	9	4	5	44,475
Police and sheriff's patrol officers	1,501	1,721	423	220	203	42,889
Military Occupations	17,285	39,708	24,276	22,423	1853	42,271
Power plant operators	62	56	4	-6	10	39,531
Fire fighters	1,117	1,277	366	160	206	39,387
Umpires, referees, and other sports officials	10	11	2	1	1	39,099
Tool and die makers	97	87	1	-10	11	37,554
Interpreters and translators	65	76	19	11	8	37,265
Total	22,669	23,115	3,152	446	2,706	
Weighted Average of Median Annual Earnings						\$43,838

Moderate-term on-the-job training

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	Median 2008 Annual Earnings
Railroad conductors and yardmasters	33	38	12	5	7	\$71,709
Audio-visual collections specialists	23	23	3	0	3	70,637
Locomotive engineers and operators	68	76	20	8	12	58,319
Signal and track switch repairers	16	16	1	0	1	48,472
Sales representatives, services, all other	606	740	208	134	74	48,286
Precision instrument and equipment repairers, all other	34	36	7	2	5	42,889
Chemical equipment operators and tenders	54	56	9	2	7	42,889
Railroad brake, signal, and switch operators	40	42	12	2	10	41,488
Media and communication equipment workers, all other	14	15	3	1	2	40,953
Wellhead pumpers	17	11	-2	-6	4	40,211
Title examiners, abstractors, and searchers	124	133	20	9	11	39,243
Sales representatives, wholesale and manufacturing, except technical and scientific products	2,377	2,387	253	10	243	39,243



Exhibit 6 (cont.)

“Good Jobs,” Upper Rio Grande Region, 2008-2013

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	Median 2008 Annual Earnings
Truck drivers, heavy and tractor-trailer	5,875	6,249	877	374	503	38,151
Cargo and freight agents	321	356	80	35	45	37,822
Total	9,602	10,178	1,503	576	927	
Weighted Average of Median Annual Earnings						\$39,482

Short-term on-the-job training

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	Median 2008 Annual Earnings
Postal service clerks	118	125	21	7	14	\$44,661
Postal service mail carriers	524	553	108	29	79	44,558
Postal service mail sorters, processors, and processing machine operators	234	235	24	1	23	42,312
Total	876	913	153	37	116	
Weighted Average of Median Annual Earnings						\$43,972

Work experience in a related field

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	Median 2008 Annual Earnings
Managers, all other	411	452	83	41	42	\$81,123
Industrial production managers	210	200	31	-10	41	77,744
First-line supervisors/managers of police and detectives	240	273	71	33	38	74,181
Transportation, storage, and distribution managers	207	223	47	16	31	65,529
Postmasters and mail superintendents	23	24	4	1	3	65,055
Real estate brokers	10	11	2	1	1	63,572
Captains, mates, and pilots of water vessels	19	20	4	1	3	59,719
Lodging managers	63	72	16	9	7	58,365
First-line supervisors/managers, protective service workers, all other	73	80	13	7	6	51,912
First-line supervisors/managers of non-retail sales workers	522	568	83	46	37	50,882
Detectives and criminal investigators	1,299	1,524	372	225	147	49,811
Fire inspectors and investigators	20	23	5	3	2	49,152
Food service managers	403	443	87	40	47	48,451
First-line supervisors/managers of mechanics, installers, and repairers	952	993	151	41	110	45,299



Exhibit 6 (cont.)

“Good Jobs,” Upper Rio Grande Region, 2008-2013

Occupation	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	Median 2008 Annual Earnings
Self-enrichment education teachers	83	97	19	14	5	44,146
First-line supervisors/managers of fire fighting and prevention workers	43	50	14	7	7	43,548
First-line supervisors/managers of transportation and material-moving machine and vehicle operators	361	390	65	29	36	42,436
Purchasing agents, except wholesale, retail, and farm products	411	421	54	10	44	41,488
Cost estimators	270	304	61	34	27	40,520
Transportation inspectors	79	89	24	10	14	40,129
Wholesale and retail buyers, except farm products	185	188	23	3	20	40,046
First-line supervisors/managers of correctional officers	175	203	52	28	24	38,707
First-line supervisors/managers of construction trades and extraction workers	1,052	1,164	184	112	72	37,574
Total	7,111	7,812	1,465	701	764	
Weighted Average of Median Annual Earnings						\$49,557

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

\$37,187.²¹ In the Upper Rio Grande region, 227 occupations pay more than this amount.

Occupations requiring doctoral and professional degrees command the highest annual earnings, with weighted median earnings of \$84,961 for the region. Occupations requiring both a college degree and work experience provide the second-highest earnings, with weighted median earnings of \$68,841. Occupations requiring a master’s degree ranked third, with a weighted median of \$61,419.

Occupations in the region requiring postsecondary vocational training provide weighted median earnings of \$41,985 annually. Occupations requiring an associate degree (without work experience) yield slightly higher earnings than those requiring a bachelor’s degree (again,

without work experience). Associate degree occupations offer weighted median earnings of \$49,864, while bachelor’s degree occupations offer weighted median earnings of \$49,033.

It should be noted that 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 provide good wages. At a weighted median of \$49,557, jobs requiring work experience but no postsecondary education provide higher earnings than jobs requiring a bachelor’s degree without work experience, at \$49,033.

Exhibit 7 lists 25 occupations expected to have the highest number of job openings in the Upper Rio Grande region between 2008



Exhibit 7

Occupations with the Most Projected Job Openings, Upper Rio Grande Region, 2008-2013

Rank	Description	2008 Jobs	2013 Jobs	Total Job Openings	Growth	Replacement	2008 Median Annual Earnings
1	Military Occupations	17,285	39,708	24,276	22,423	1,853	\$42,271
2	Retail salespersons	11,067	12,757	3,487	1,690	1,797	17,016
3	Cashiers, except gaming	8,396	9,157	3,014	761	2,253	14,358
4	Waiters and waitresses	5,413	6,285	2,346	872	1,474	13,843
5	Combined food preparation and serving workers, including fast food	10,009	11,184	2,123	1,175	948	13,926
6	Personal and home care aides	4,701	6,014	1,721	1,313	408	13,411
7	Customer service representatives	4,238	5,304	1,682	1,066	616	23,031
8	Elementary school teachers, except special education	5,961	6,814	1,511	853	658	59,987
9	Postsecondary teachers	4,459	5,358	1,280	899	381	70,328
10	Telemarketers	3,177	3,671	1,244	494	750	16,521
11	Office clerks, general	5,964	6,608	1,189	644	545	18,066
12	Registered nurses	4,800	5,388	987	588	399	54,178
13	Laborers and freight, stock, and material movers, hand	5,484	5,607	959	123	836	16,789
14	Secondary school teachers, except special and vocational education	3,693	4,074	933	381	552	61,223
15	Janitors and cleaners, except maids and housekeeping cleaners	4,689	5,152	911	463	448	16,583
16	Truck drivers, heavy and tractor-trailer	5,875	6,249	877	374	503	38,151
17	Secretaries, except legal, medical, and executive	6,323	6,641	817	318	499	22,578
18	Stock clerks and order fillers	4,189	4,324	808	135	673	16,789
19	Middle school teachers, except special and vocational education	2,907	3,289	702	382	320	59,390
20	Bookkeeping, accounting, and auditing clerks	3,785	4,156	666	371	295	26,698
21	Security guards	3,379	3,686	652	307	345	17,016
22	First-line supervisors/managers of retail sales workers	2,774	3,119	652	345	307	30,385
23	General and operations managers	3,553	3,773	647	220	427	64,622
24	First-line supervisors/managers of office and administrative support workers	2,986	3,304	628	318	310	36,421
25	Correctional officers and jailers	2,058	2,432	614	374	240	31,662

Source: Economic Modeling Specialists Inc.



and 2013. Retail salespersons top the list, with 3,487 new job openings through 2013 and median annual earnings of \$17,016.²²

Eleven of the 25 occupations require only short-term, on-the-job training. These provide median annual earnings ranging between \$13,411 and \$18,066. Three of the occupations require a bachelor’s degree, including elementary, middle and secondary school teachers.

Comptroller Assistance

One of the many functions of the Texas Comptroller of Public Accounts is to analyze

demographics, labor force statistics and other economic factors needed to generate local economic growth, and to provide this information to local governments and other groups. Through its Texas EDGE (Economic Data for Growth and Expansion) program, the agency can identify occupational and industry trends and their effects on local and regional economies.

Since August 2008, the Comptroller has responded to 549 Texas EDGE requests from city and county government officials, economic development corporations, private

Shopping and Retail in Upper Rio Grande Region

Businesses and commercial establishments in the Upper Rio Grande region generated more than \$8.7 billion in gross sales in 2007. About 41 percent, or almost \$3.6 billion of that amount, was subject to state and local sales taxes. State sales taxes levied in the region totaled \$297 million in 2007.

In 2007, the Upper Rio Grande region had 36,839 retail employees earning total wages of \$798.7 million. Brewster County had the region’s largest percentage increase in retail employment from 2006 to 2007, with an increase of 9 percent. Total retail wages in the region rose by \$54.9 million from 2006 to 2007.

The Upper Rio Grande region offers a broad selection of retail shopping, some taking advantage of regional manufacturing. El Paso calls itself the “Boot Capital of the World,” with more than 12 manufacturers and retailers in the surrounding area. Reminiscent of Mexican open-air markets, El Paso’s *mercados* offer a range of unique handcrafted goods including crafts, clothing, antiques and furniture.

Marfa has a number of art galleries with items reflecting the cultural heritage of the American West. More modern pieces can be found at galleries such as Ballroom Marfa, the Galleri Urbane and the Inde/Jacobs.²³

Retail Gross Sales, Sales Tax and Wages, Upper Rio Grande Region, 2007

County	Gross Sales, 2007	Amount Subject to Sales Tax, 2007	Sales Tax, 2007	Employees, 2007	Total Wages, 2007
Brewster	\$78,058,243	\$39,710,737	\$3,276,136	872	\$14,856,209
Culberson	103,717,657	13,691,776	1,095,342	285	4,394,775
El Paso	8,469,375,027	3,512,345,590	289,768,511	35,309	774,216,989
Hudspeth	8,990,083	1,872,841	117,053	72	855,964
Jeff Davis	7,948,590	4,577,836	377,671	51	1,048,767
Presidio	45,329,477	23,405,145	1,872,412	250	3,362,007
Total	\$8,713,419,077	\$3,595,603,925	\$296,507,125	36,839	\$798,734,711

Sources: Texas Comptroller of Public Accounts and Texas Workforce Commission.



Apparel and Footwear Manufacturing Industry Profile

Strategically located along the Mexican border, El Paso maintains a strong footwear manufacturing sector and was once a leader in apparel manufacturing. Businesses take advantage of abundant materials imported from Mexico to produce clothing and shoes in Texas that are then shipped throughout the world. In 2007, the 40 regional footwear manufacturers employed 1,811 workers and paid \$56.5 million in wages. Similarly, the region's 39 apparel manufacturers employed 1,372 workers and paid \$43.3 million in wages.²⁴

Among El Paso's many boot manufacturers, the Lucchese plant serves as the company's only factory, producing its entire catalog of cowboy boots. After acquiring Dan Post Boots in 1986, Lucchese relocated from San Antonio to consolidate manufacturing in El Paso. With more than 330 employees, the plant makes approximately 3,500 pairs of boots per week. Materials and supplies come from around the world, but mostly from within the U.S., and final products are distributed from an on-site warehouse.²⁵

Apparel manufacturing in the Upper Rio Grande region has been hurt by

competition from globalization, as lower production costs overseas and in Mexico have forced producers abroad. Even so, many resilient businesses have remained in the region, shifting their operations from manufacturing to distribution and logistics services within the transportation sector.

The region's transportation services provided 9,865 jobs in 2007, mostly in truck transportation. Highways and international road ports help give the regional transportation industry more than twice the job share of the national norm, with a location quotient of 2.02. Rail transportation also plays an important regional role, providing 1,055 jobs in 2007.²⁶

Other regional businesses have shifted from producing clothes for retail stores to filling government contracts. El Paso's Excel Garments, for instance, has been in business for 33 years and began as a garment washing service. The company moved into garment manufacturing, making denim for retail clothing lines, until it entered military uniform production four years ago. Today, Excel employs 385 workers and draws annual revenues of nearly \$12 million.²⁷

2007 Industry Figures, Upper Rio Grande Region

	Jobs	Wages	Establishments	Average Annual Wage
Apparel Manufacturing	1,372	\$43,258,820	39	\$31,530
Footwear Manufacturing	1,811	\$56,503,410	40	31,200
Truck Transportation	7,052	258,900,076	411	36,713
Rail Transportation	1,055	87,388,815	—	82,833
Transportation Support Services	1,758	\$62,976,834	177	\$35,823

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



businesses and members of the media. These requests have covered many topics including demographics, economic development, economic modeling and taxes.

The Comptroller 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 agency 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 (<http://www.texasahead.org>) provides information on tax programs and incentives, best

practices and economic indicators, as well as reports and publications such as a recent report on Texas work force training entitled *Texas Works*. Texas EDGE also allows users 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. SECO is anticipating an influx of federal funds through the American Recovery and Reinvestment Act to help local governments save energy, create or retain jobs, increase energy generation from renewable resources and reduce greenhouse gas emissions.

Travel and Tourism Industry Profile

Travel and tourism is the second largest "export-oriented" (serving consumers outside of the state) industry in Texas, behind oil and gas. In 2007, the industry's contribution to gross state product totaled \$23.1 billion. While the industry is important to the overall state economy, it is of even greater importance in rural regions.²⁸

In 2007, tourism accounted for 2.3 percent of earnings and 3.8 percent of employment in the state. As the table on page 30 shows, some counties in the Upper Rio Grande region rely more heavily on travel and tourism.

Travel and tourism supplies more than 10 percent of total employment in just five Texas counties, and two of them — Brewster County (20 percent) and Culberson

County (10.3 percent) — are in the Upper Rio Grande region. Furthermore, Brewster, Culberson and Jeff Davis counties are three of only five counties in the state that receive more than 10 percent of county revenue from tourism.²⁹

In 2007, travel and tourism employed 13,510 in the region, 17.2 percent more than in 1994. During this period, annual spending related to travel and tourism was nearly \$1.5 billion in 2007, up 82.4 percent from 1994. Related annual earnings totaled \$334 million in 2007, 68.6 percent more than in 1994. Local tax receipts were \$21.4 million and state tax receipts were \$80.1 million in 2007, up 72 percent and 67 percent, respectively, from 1994.³⁰



Travel and Tourism Industry Profile (cont.)

The region's four national parks and eight state parks are major tourist destinations. In 2008, its national parks attracted nearly 800,000 visitors, while nearly 240,000 people visited the state parks. Big Bend National Park led with 362,512 visitors, followed by Chamizal National Memorial with 197,767.³¹ Among state parks, Davis Mountain State Park had more than 128,000 visitors in 2008. More than half of these visitors (65,545) stayed at Indian Lodge.³²

Sales in the region's national parks produced an economic impact of nearly \$28 million in 2007.³³ This includes spending on hotels, campsites, restaurants, admission fees and retail purchases. In 2006, the region's state parks generated an economic impact of \$7 million. (See the Parks section on Page 53 for more details.)³⁴

Travel and Tourism Earnings and Employment by County Upper Rio Grande Region, 2007

Earnings (in millions)

County	Total	Travel and Tourism Related	Percent of County Earnings
Brewster	\$188	\$22	12%
Culberson	38	4	11
El Paso	15,482	304	2
Hudspeth	48	0	1
Jeff Davis	22	3	12
Presidio	71	2	2%
Total	\$15,849	\$335	

Source: Dean Runyan Associates.

Employment

County	Total	Travel and Tourism Related	Percent of County Employment
Brewster	6,710	1,340	20%
Culberson	1,750	180	10
El Paso	365,550	11,810	3
Hudspeth	1,750	20	1
Jeff Davis	1,340	100	8
Presidio	280	60	2%
Total	377,380	13,510	

Source: Dean Runyan Associates.

Direct Travel Impact, Upper Rio Grande Region, 2007

County	Total Direct Spending (in thousands)	Earnings (in thousands)	Employment	Tax Receipts (in thousands) Local	Tax Receipts (in thousands) State
Brewster	\$47,900	\$21,850	1,340	\$990	\$2,660
Culberson	35,580	4,020	180	330	2,240
El Paso	1,392,970	303,470	11,810	19,870	73,910
Hudspeth	5,640	330	20	-	360
Jeff Davis	7,670	2,720	100	-	430
Presidio	8,630	1,590	60	210	490
Total	\$1,498,390	\$333,980	13,510	\$21,400	\$80,090

Source: Dean Runyan Associates.



Historic Hotels in the Upper Rio Grande Region

The Upper Rio Grande region is home to three famous hotels that reflect the area's rich culture. The Gage Hotel in Marathon, the Hotel Paisano in Marfa and the Holland Hotel in Alpine provide rest, relaxation and unique atmosphere for thousands of tourists every year.

The Gage Hotel, located in Marathon, dates from the nineteenth century. In 1878, Alfred Gage came to West Texas to establish himself as a rancher, banker and businessman. He worked with El Paso architects Trost & Trost to build the Gage Hotel. Unfortunately, Gage never saw the hotel's glory days, as he passed away one year following the hotel's completion. A century later, the hotel was bought and restored by J.P. and Mary Jon Bryan, who worked to make the hotel reflect a mix of Spanish, Native American and Mexican cultures.

Modern additions to the hotel include a spa, fitness area and space for weddings and other social gatherings. The swimming pool is heated for year-round enjoyment. The Gage has added 20 adobe rooms and several freestanding cabins in addition to the original hotel building.³⁵

Marfa's Hotel Paisano was completed in 1930 by famed El Paso architect Charles Bassett. The hotel flourished due to its proximity to a railroad depot, serving as a stop for travelers passing through town on their way to the West Coast. Hotel Paisano was also a popular location for weddings and other gatherings. At times, its lobby served as an auction block for local ranchers selling cattle.

In 1955, the Hotel Paisano became a temporary home for the movie *Giant's* leading actors, James Dean, Elizabeth Taylor and Rock Hudson. The Paisano closed in the 1970s, but was restored beginning in 2001 to its original glory and now offers 33 rooms and suites along with spaces for social gatherings.³⁶

Alpine's Holland Hotel, built in 1912, served as a "civic, social, and historic center" for the booming mining town. An extensive addition was added in 1928. The hotel is located across the street from the railroad depot, giving it easy access to travelers and area newcomers. Today, the Holland is a full-service retreat with several types of rooms and suites, including offices and retail establishments on the ground floor and in the lobby.³⁷

The Camino Real Hotel and Resort, also as the Paso del Norte Hotel by its designer, was inspired by the local people of El Paso as well as the scenery surrounding the city. Construction was completed in 1912 with crystal chandeliers, a grand staircase and marble from an Italian craftsman. One especially unique aspect of the hotel is the 25-foot-diameter Tiffany-cut glass dome suspended by wires in the appropriately named Dome Bar. The lobby was a gathering spot for updates on the progress of the Mexican Revolution and later as a meeting spot to sell cattle. The White family continued their ownership of the hotel through generations, until TKG Investment Co. Ltd. bought it in 1970 with the promise to refurbish but keep its original integrity. By 2004 Camino Real Hotels & Resorts had completed a \$4.2 million remodel and update on the entire building. It is situated in downtown El Paso close to the convention center, allowing for good use of the 19 meeting rooms and 359 guest rooms and suites.³⁸

In 2008, these four hotels earned more than \$8.5 million in revenue and accommodated an estimated 100,000 overnight guests, mostly visiting from outside the region. Occupancy rates average around 65 percent of capacity for each hotel. Together, these historic tourist destinations employ more than 320 workers.³⁹

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