AACOG
Alamo Area Council Of Governments

AACOG Economic Development District Comprehensive Economic Development Strategy

CEDS // 2018-2023

Alamo Area Council of Governments
Economic Development District
Comprehensive Economic Development Strategy 2018-2023

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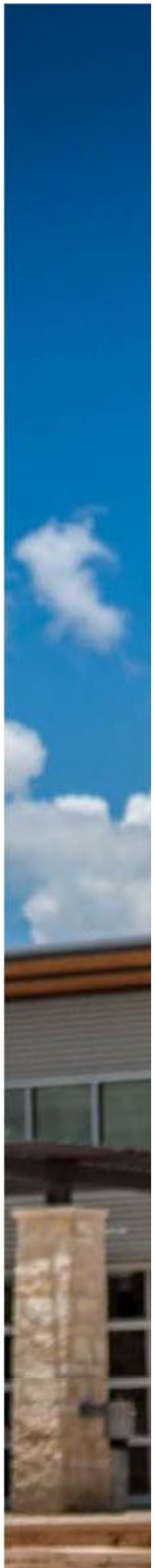

ACKNOWLEDGEMENTS

Alamo Area Council of Governments (AACOG) Economic Development District (EDD) makes a concerted effort to ensure the region’s diversity is reflected in the membership of the Comprehensive Economic Development Strategy (CEDS) Committee.

The CEDS Committee includes:

Allison Blazosky, Alamo Area MPO
Rusty Brockman, New Braunfels EDC
Tracey Campos, San Antonio EDF
Art Crawford, Bandera EDC
Mayor James Danner, City of Hondo
Arnie Dollase, Castroville Area EDC
Yvonne Griffin, City of La Vernia
Johnny Huizar, City of Pleasanton
Kyle Kinateder, Schertz EDC
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Mayor Mary Ann Obregon, City of Dilley
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Col. Jesse Perez, Hondo EDC
Mindy Riley, City of Floresville
Dora Rodriguez, City of Devine
Josh Schneuker, Seguin EDC
Melissa Shannon, Bexar County ED
Skadi Tirpak, City of San Antonio ED
Mayor Robert Williams, City of Jourdanton

AACOG has developed a network of stakeholders that contribute to the development and implementation of the Comprehensive Economic Development Strategy (CEDS). The CEDS Committee is comprised of invested stakeholders from throughout the region to include elected officials, economic development entities and municipalities. The makeup of the committee is intended to reflect the diverse perspective and interests in the region, as well as to give the EDD efficacy in implementing the CEDS. The CEDS Committee convenes quarterly to evaluate the effectiveness of the Recommendations and the Plan of Action. Annual progress on the CEDS performance will be reported as prescribed by the Economic Development Administration (EDA). Stakeholders are given an opportunity to review a draft of the 2018-2023 CEDS and provide commentary addressing specific areas of interest prior to presentation to the AACOG Board of Directors.

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Honorable Chris Fails – Vice-Chairman, Mayor, Town of Hollywood Park

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Judith Zaffirini, Senator, State of Texas, District 21
Filipe “Fil” Jimenez, Technical Director for Installation Support, 502d Air Base Wing

SECTION I: INTRODUCTION

The Comprehensive Economic Development Strategy (CEDS) serves as a roadmap that aggregates and synthesizes economic development initiatives throughout the 13-county Alamo region and clarifies how the regional economy is likely to diversify and strengthen over a five-year period (2018-2023). The CEDS is a prerequisite for designation as an Economic Development District (EDD). Districts must update their CEDS at least every five years to qualify for EDA assistance under its Public Works and Economic Adjustment Assistance programs

The Alamo Area Council of Government's Economic Development District CEDS was developed through a locally-based, regionally-driven economic development planning process. AACOG's area stakeholders have a history of working together to integrate and leverage each other's local regional planning goals, objectives, tasks and project efforts. In developing the CEDS, AACOG inventoried and reviewed existing economic development plans, reports, initiatives and strategies underway in AACOG's 13-county areas. Collaborations and economic development initiatives were incorporated into the CEDS to create a collective regional strategy-driven plan.

AACOG also engaged the CEDS Committee and community partners to contribute and validate the analysis, goals and benchmarks assessed in the CEDS. Community comment period was from September 1, 2017 through October 19, 2017.

SECTION II: EXISTING CONDITIONS

GEOGRAPHY

The Alamo Area Council of Governments (AACOG) region is comprised of thirteen counties: Atascosa, Bandera, Bexar, Comal, Frio, Gillespie, Guadalupe, Karnes, Kendall, Kerr, Medina, McMullen and Wilson.

The 13-county region consists of approximately 12,494.70 square miles. Based on 2010 U.S. Census data, the regional area has a population density of approximately 180 residents per square mile compared to a statewide density of approximately 97 residents per square mile.

The largest counties in the region are Medina County (approximately 1,325 square miles), Bexar County (approximately 1,239 square miles) and Atascosa County (approximately 1,219 square miles) of land.

Approximately 17% of McMullen County and approximately 16% of Bexar County is covered by surface water (rivers, reservoirs, etc.). The land topography for the 13-county region is a variation described as irregular plains and plains with high and open hills.

Land Density

Table 1

Area	Population density	Population	Land Area	Water Area
Atascosa	36.8	44,911	1,219.50	1.90
Bandera	25.9	20,485	791	6.70
Bexar	1383.1	1,714,773	1,239.80	16.30
Comal	193.9	108,472	559.50	15.40
Frio	15.2	17,217	1,133.50	0.90
Gillespie	23.5	24,837	1,058.20	3.50
Guadalupe	184.9	131,533	711.30	3.50
Karnes	19.8	14,824	747.60	6.00
Kendall	50.4	33,410	662.5	0.60
Kerr	45	49,625	1,103.30	4.00
McMullen	0.6	707	1,139.40	17.40
Medina	34.7	46,006	1,325.40	9.20
Wilson	53.4	42,918	803.7	4.70
Total 13-Counties	179.99	2,249,018	12,494.70	90.10

Source: 2010 U. S. Census Bureau

POPULATION TRENDS

POPULATION TRENDS

In 2016, the AACOG 13-county region had 2,542,648 people living in the area, an 11.52% increase or 292,903 additional people since 2010. When looking at the historical population growth of the region, the greatest increase in population occurred between 2000 and 2010, when the region grew by 19.25% or 433,118 additional persons (Table 2).

In 2016, the AACOG 13-county region in total represented 9.12% of the entire population of the State of Texas. The AACOG 13-county regional area also had a larger percentage of population growth rate between 2010 and 2016 at 11.52% than the State of Texas at 9.39% in the same period. Since 1980, the AACOG 13-county region has remained between 8.61% and 9.12% of the total State of Texas population.

At 46.7%, Guadalupe County grew at the largest growth rate between 2000 and 2010, when comparing the population growth rate with the other regional counties. In 2016, the largest population centers in the AACOG region remain in Bexar, Comal, and Guadalupe Counties. The 13 county region doubled in population from 1980 to 2016 (Table 3).

Population Growth

Table 2

Year	Texas Population	AACOG Region Growth Every Ten Years	AACOG Region Every 10 Years Percentage Growth	AACOG Region % of Texas Population
2016	27,862,596	2,542,648	11.52%	9.12%
2010	25,244,310	2,249,718	19.25%	8.91%
2000	20,851,820	1,816,600	17.92%	8.71%
1990	16,986,335	1,490,974	17.81%	8.77%
1980	14,229,191	1,225,298		8.61%
Source: U.S. Census Bureau				

POPULATION TRENDS

Population over Time

Table 3

Area	2016	2010	2000	1990	1980	2000 to 2010 % Change	1990 to 2010 % Change	1980 to 2010 % Change
Atascosa	48,797	44,911	38,788	30,545	25,055	15.8%	47.0%	79.2%
Bandera	21,776	20,485	17,742	10,622	7,084	15.5%	**92.9%**	189.2%
Bexar	1,928,680	1,714,773	1,398,317	1,187,593	988,971	22.6%	44.4%	73.4%
Comal	134,788	108,472	78,750	51,943	36,446	37.7%	**108.8%**	197.6%
Frio	18,956	17,217	16,178	13,548	13,785	6.4%	27.1%	24.9%
Gillespie	26,521	24,837	20,892	17,226	13,532	18.9%	44.2%	83.5%
Guadalupe	155,265	131,533	89,690	65,019	46,708	**46.7%**	**102.3%**	181.6%
Karnes	15,254	14,824	15,416	12,403	13,593	-3.8%	19.5%	9.1%
Kendall	42,540	33,410	23,986	14,677	10,635	39.3%	127.6%	214.2%
Kerr	51,504	49,625	43,841	36,355	28,780	13.2%	36.5%	72.4%
McMullen	804	707	847	815	789	-16.5%	-13.3%	-10.4%
Medina	49,283	46,006	39,474	27,405	23,164	16.5%	67.9%	98.6%
Wilson	48,480	42,918	32,679	22,823	16,756	31.3%	88.0%	156.1%
Total 13-Counties	2,542,648	2,249,718	1,816,600	1,490,974	1,225,298	-	-	-

Source: U.S. Census Bureau

POPULATION TRENDS

In 2015, White, Hispanics represented 51.12% of the total AACOG 13-county region population. That group is projected to grow by 13% between 2015 and 2024. Within the AACOG region, 35.57% of the population identify as White, Non-Hispanics. This group is projected to grow by 6% or 52,255 persons by 2024.

Table 4

Race/Ethnicity	2015 Population	2024 Population	Change	% Change	2015 % of Cohort
White, Hispanic	1,275,746	1,436,221	160,475	13%	51.12%
White, Non-Hispanic	887,786	940,041	52,255	6%	35.57%
Black, Non-Hispanic	157,241	182,249	25,008	16%	6.30%
Asian, Non-Hispanic	57,932	72,969	15,037	26%	2.32%
Two or More Races, Non-Hispanic	33,333	41,890	8,557	26%	1.34%
Black, Hispanic	23,861	29,285	5,424	23%	0.96%
American Indian or Alaskan Native, Hispanic	22,618	25,853	3,235	14%	0.91%
Two or More Races, Hispanic	19,434	24,184	4,750	24%	0.78%
American Indian or Alaskan Native, Non-Hispanic	6,618	7,465	847	13%	0.27%
Asian, Hispanic	6,343	7,756	1,413	22%	0.25%
Native Hawaiian or Pacific Islander, Non-Hispanic	2,663	3,321	658	25%	0.11%
Native Hawaiian or Pacific Islander, Hispanic	2,029	2,415	386	19%	0.08%
Total	2,495,603	2,773,650	278,047	11%	100.00%
Source: EMSI - (US Census Bureau, US Health Department and TWC)					

POPULATION TRENDS

In 2015, the 13-county region had an estimated 343,219 persons' age 30 to 39 years representing 13.75% of the total regional population, the age group is projected to grow by 57,724 and be the largest age cohort at 14.50% of the total regional population by 2024.

The AACOG region is projected to decrease by 1,567 persons in the 50 to 59 years of age cohort. The age group 70 to 79 years is projected to show the largest increase of the total population growth by 2024, at 30.91% or 59,160 persons.

The AACOG regional population will be concentrated with population ranging in the 20 to 49 years of age representing 1,134,749 persons or 40.91% of the total projected population in 2024.

Population by Age

Table 5

Age Cohort	2015 Population	2024 Population	Change	% Increase	2015 % of Cohort	2024 % of Cohort
Under 5 years	170,984	197,041	26,057	13.22%	6.85%	7.10%
5 to 14 years	356,531	377,457	20,926	5.54%	14.28%	13.60%
15 to 19 years	178,935	192,718	13,783	7.15%	7.17%	6.99%
20 to 29 years	370,572	382,256	11,684	3.05%	14.84%	13.78%
30 to 39 years	343,219	402,365	57,724	14.34%	13.75%	14.50%
40 to 49 years	314,605	350,128	35,523	10.14%	12.60%	12.62%
50 to 59 years	308,932	307,365	-1,567	-0.50%	12.37%	11.08%
60 to 69 years	241,131	285,618	44,487	15.57%	9.66%	10.29%
70 to 79 years	**132,222**	**191,382**	**59,160**	**30.91%**	**5.29%**	**6.90%**
80 years+	78,472	87,321	8,849	10.13%	3.14%	3.14%
Total	2,495,603	2,773,651	276,626	9.97%	100.00%	100.00%

Source: U. S. Census Bureau

EDUCATIONAL ATTAINMENT

EDUCATIONAL ATTAINMENT

In 2015, persons over the age of 25 who completed high school was estimated at 26.2%, collectively in the 13-County region, which is higher when compared with the State of Texas at 25.3% (see Table 6). The AACOG 13-county region has a higher percentage of persons, at 23.6% that have some college credits but did not complete their education than the State of Texas at 21.8%. Persons over the age of 25 residing in the 13-county region that hold Bachelors or Graduate Degrees is slightly lower at 26.5% when compared to the State of Texas at 28.4%.

The percentage of the population for each educational attainment category in each respective County is shown in Table 6. When comparing the percentage of persons in the 13-county area who have less than a high school diploma to Texas at 17.6%, there are five counties who have a higher percent of their county population falling in this category – Frio at 34.4%, Karnes at 26.2%, Atascosa at 24.2%, McMullen at 23.7% and Medina at 18.3%. The State of Texas has 35.3% of the population over the age of 25 holding an Associate's – Graduate and Higher Degrees. In comparison, there are three counties that have a higher percentage of their population holding Associate's – Graduate and higher Degrees – Kendall at 48.3%, Comal at 41.5%, and Gillespie at 38.4%.

EDUCATIONAL ATTAINMENT

EDUCATIONAL ATTAINMENT, AGE 25+ (2015)

Table 6

County	Population, Age 25+	Less Than 9th Grade	9th Grade to 12th Grade	High School Diploma	Some College	Associate's Degree	Bachelor's Degree	Graduate Degree and Higher
Atascosa	29,641	**11.5%**	**12.7%**	36.0%	20.3%	5.5%	9.3%	4.7%
Bandera	15,840	5.4%	8.8%	29.2%	25.7%	8.3%	15.4%	7.2%
Bexar	1,145,479	8.1%	8.5%	25.2%	23.9%	7.6%	17.1%	9.6%
Comal	82,814	5.0%	4.6%	25.5%	23.4%	**8.1%**	**22.9%**	**10.5%**
Frio	10,961	**18.0%**	**16.4%**	33.8%	18.8%	5.0%	7.0%	1.0%
Gillespie	18,728	7.1%	6.2%	26.6%	21.8%	**5.0%**	**22.7%**	**10.7%**
Guadalupe	92,461	5.2%	7.4%	29.7%	23.0%	8.6%	17.0%	9.0%
Karnes	10,186	**11.3%**	**14.9%**	36.3%	18.9%	5.6%	10.0%	3.0%
Kendall	25,551	4.1%	5.1%	21.1%	21.5%	**7.4%**	**26.7%**	**14.2%**
Kerr	36,128	5.1%	7.3%	27.8%	25.8%	5.9%	18.4%	9.7%
McMullen	544	**14.5%**	**9.2%**	29.0%	27.6%	4.2%	8.3%	7.2%
Medina	31,240	**9.1%**	**9.2%**	31.9%	23.2%	7.8%	13.2%	5.8%
Wilson	30,423	6.7%	8.2%	34.8%	22.7%	8.1%	13.5%	6.0%
Total 13-County	1,529,996	7.8%	8.3%	26.2%	23.6%	7.5%	17.2%	9.3%
State of Texas				25.3%	21.8%	18.7	9.7	35.3%

Source: U. S. Census Bureau

MEDIAN HOUSEHOLD INCOME

MEDIAN HOUSEHOLD INCOME

Median household income levels in seven of the AACOG regional counties are higher than the State of Texas at $53,207—Kendall at $79,108, Wilson at $68,805, Comal at $68,362, Guadalupe at $64,252, McMullen at $60,709, Gillespie at $54,180, and Bandera at $53,662.

Although, the remaining six counties are lower in median household income in 2015, when compared to the State of Texas, the six counties are showing significant change increases from 2000 to 2015 in median household income, such as Karnes County, which showed a 75.90% change.

Frio County had a 56.80% change from 2000-2015; however, the 2015 median household income is still less than the State of Texas in 2015.

Median Household Income Table 7

County	Median Household Income in 2015	Median Household Income in 2000	Percent Change 2000 to 2015
Atascosa	$49,047	$33,284	47.40%
Bandera	**$53,662**	$39,374	36.30%
Bexar	$52,230	$39,540	32.10%
Comal	**$68,362**	$47,472	44.00%
Frio	$38,809	$24,746	56.80%
Gillespie	**$54,180**	$38,551	40.50%
Guadalupe	**$64,252**	$43,134	49.00%
Karnes	$47,129	$26,797	**75.90%**
Kendall	**$79,108**	$50,859	55.50%
Kerr	$47,389	$34,412	37.70%
McMullen	**$60,709**	$34,902	73.90%
Medina	$52,831	$35,723	47.90%
Wilson	**$68,805**	$40,852	68.40%
Texas	$53,207		

Source: U. S. Census Bureau

POVERTY

POVERTY RATE

Poverty rates in the 13-county area in 2015, range from 8.0% to 29.3%. When comparing the increase or decrease change from 2000 – 2015 poverty rates, 10 counties show a decrease in the poverty rate,

In the remaining three counties, Bandera County's poverty rate at 13.3%, showed no change, while Atascosa at6.80%, and Kerr at 0.70%, increased their respective poverty rates from 2000 to 2015, as did the State of Texas.

Although the largest decrease change from 2000 to 2015 occurred in Karnes County, which decreased their poverty rate from 26.5% to 20.0%, the County's poverty rate in 2015, along with Frio and Atascosa Counties, remains higher than the State of Texas' poverty rate change between 2000 and 2015 at 32.5%.

Poverty Rate Estimates

Table 8

Poverty Estimates	Poverty Rate in 2015	Poverty Rate In 2000	Percent Increase or Decrease Change
Atascosa	20.4	19.1	6.80%
Bandera	13.3	13.3	0.00%
Bexar	15.6	15.7	**-0.60%**
Comal	8.3	9	**-7.80%**
Frio	29.3	32.2	**-9.00%**
Gillespie	10.4	11.1	**-6.30%**
Guadalupe	10.3	12.1	**-14.90%**
Karnes	20	26.5	**-24.50%**
Kendall	8	8.5	**-5.90%**
Kerr	14.3	14.2	0.70%
McMullen	10	12.9	**-22.50%**
Medina	14.8	16.5	**-10.30%**
Wilson	9.4	12	**-21.70%**
Texas	15.9	12	32.50%

Source: U. S. Census Bureau

EMPLOYMENT

WAGES AND ESTABLISHMENTS

According to Texas Workforce Commission, there were 53,119 business establishments located in the 13-County AACOG region in 2016, which represents a 6.0% increase from 2014. The average employment also showed an increase of 59,039 people or 5.78% average employment between 2014 and 2016. The total amount of wages paid in the 13-County region has also increased from 2014 to 2016 by $1.3 billion and average weekly wages increased by 2.4%

Table 9

Table 9

Year	Establishments	Average Employment	Total Wages	Average Weekly Wages
2016	53,119	1,020,687	$11,865,596,308	$822
2015	51,494	990,631	$11,029,620,034	$799
2014	49,923	961,648	$10,484,148,102	$802
Source: TWC TRACER 2 - 3rd Quarter				

EMPLOYMENT

JOB GROWTH—see Table 10

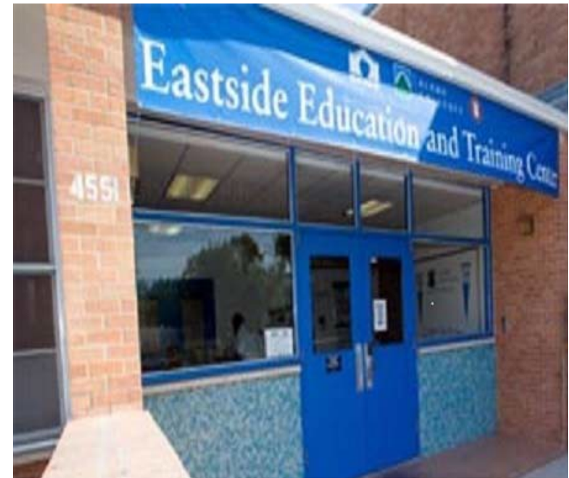
According to the U.S. Bureau of Labor Statistics (BLS), the AACOG 13-County area has shown significant increases in the number of jobs in the period between 2005 and 2015. Frio at 74.40% and McMullen at 186.20% had the highest number of jobs increase change in comparison; however, Atascosa, Frio and McMullen Counties are showing decreases in jobs from 2014 to 2015. Within the 10-year period 2005 to 2015, the largest concentration of jobs increase occurred in Bexar at 145,232, Comal at 15,533, Guadalupe at 7,647, and Kendall at 4,693 more jobs.

ESTABLISHMENTS—see Table 11

The AACOG 13-County region from 2005 to 2015, has shown a steady increase in the number of establishments, McMullen at 119.40% and Kendall at 50.10% had the greatest 10 year percent change. Bexar County at 7,912 is showing the largest number of added establishments in the 2005 – 2015 period. Kerr County is showing a slight decrease from 2005 to 2015, in the number of establishments located in the county.

WAGES OVER TIME—see Table 12

The AACOG 13 Counties average wages show a steady increase from 2005 to 2015. Average wages over the period had a 112.00% change increase in Karnes, a 107.80% average wage increase for Frio, and an 85.0% increase in McMullen County. Frio and Atascosa Counties are showing a decrease in average wages from 2014 to 2015. According to the Bureau of Labor Statistics, McMullen at $54,559 and Karnes at $51,765 have the highest average annual wages within the 13-County region.



EMPLOYMENT

Annual Job Growth

Table 10

County	2015	2014	2013	2012	2011	2010	2009	2008	2007	2006	2005	10-Year Change	10-Year Percent Change
Atascosa	**12,811**	13,381	13,021	10,704	9,760	9,346	9,430	9,580	9,289	9,169	8,810	4,001	45.4%
Bandera	3,117	2,995	2,965	2,952	2,939	2,890	2,926	3,105	3,042	2,969	2,854	263	9.2%
Bexar	818,499	793,727	770,531	749,534	732,527	722,147	715,292	730,302	716,666	699,345	673,267	**145,232**	21.6%
Comal	48,500	44,951	42,800	42,249	41,073	39,332	39,173	39,034	36,955	35,209	32,967	**15,533**	47.1%
Frio	**7,085**	7,452	6,087	5,954	5,190	4,859	4,667	4,371	4,287	4,206	4,063	3,022	**74.4%**
Gillespie	10,133	9,828	9,560	9,359	9,340	9,122	9,133	9,066	8,939	8,736	8,535	1,598	18.7%
Guadalupe	34,125	33,021	31,484	30,602	29,983	28,932	28,825	29,887	28,787	27,645	26,478	**7,647**	28.9%
Karnes	5,839	5,643	4,768	4,177	3,781	3,716	3,726	3,781	3,798	3,856	3,927	1,912	48.7%
Kendall	14,020	12,668	12,081	11,675	11,243	10,654	10,755	10,674	10,176	9,846	9,327	**4,693**	50.3%
Kerr	17,603	17,438	17,144	17,232	16,967	17,151	17,436	18,112	17,890	17,379	17,200	403	2.3%
McMullen	**664**	754	572	465	399	256	219	207	200	203	232	432	**186.2%**
Medina	9,363	9,285	8,749	8,564	8,238	8,015	8,072	8,363	8,649	8,344	8,009	1,354	16.9%
Wilson	7,663	7,447	7,072	6,683	6,645	6,490	6,419	6,546	6,400	6,250	6,099	1,564	25.6%

Source: U. S. Census Bureau

EMPLOYMENT

Annual Number of Establishments

Table 11

County	2015	2014	2013	2012	2011	2010	2009	2008	2007	2006	2005	10-Year Change	10-Year Percent Change
Atascosa	876	851	818	779	754	750	754	763	786	735	710	166	23.4%
Bandera	445	433	423	425	422	419	428	426	435	405	382	63	16.5%
Bexar	38,260	37,140	36,309	35,455	34,386	33,607	33,057	32,655	32,905	31,105	30,348	**7,912**	26.1%
Comal	3,261	3,121	3,027	2,935	2,830	2,793	2,793	2,746	2,710	2,510	2,385	876	36.7%
Frio	432	418	411	388	356	341	342	332	331	329	337	95	28.2%
Gillespie	1,053	1,022	1,018	1,008	1,001	992	1,004	1,014	1,041	1,001	967	86	8.9%
Guadalupe	2,003	1,969	1,911	1,866	1,838	1,806	1,788	1,794	1,793	1,684	1,606	397	24.7%
Karnes	385	373	342	322	289	261	264	273	291	280	289	96	33.2%
Kendall	1,342	1,285	1,249	1,181	1,121	1,095	1,072	1,062	1,052	962	894	448	**50.1%**
Kerr	1,462	1,439	1,433	1,462	1,455	1,482	1,499	1,533	1,561	1,492	1,466	-4	-0.3%
McMullen	79	69	61	51	46	42	34	36	36	36	36	43	**119.4%**
Medina	828	818	785	777	756	738	741	735	732	697	677	151	22.3%
Wilson	701	656	622	604	584	571	558	568	561	529	516	185	35.9%

Source: U. S. Bureau Labor Statistics

EMPLOYMENT

Annual Wages Over Time

Table 12

County	2015	2014	2013	2012	2011	2010	2009	2008	2007	2006	2005	10-Year Change	10-Year Percent Change
Atascosa	$43,392	$44,727	$42,064	$37,515	$35,491	$33,842	$32,202	$32,898	$31,116	$30,050	$27,886	$15,506	55.6%
Bandera	$33,661	$33,604	$32,007	$29,809	$28,461	$27,587	$26,835	$25,320	$25,624	$24,187	$23,962	$9,699	40.5%
Bexar	$47,201	$45,676	$44,271	$43,918	$43,195	$41,632	$40,524	$39,720	$39,164	$37,568	$35,877	$11,324	31.6%
Comal	$40,995	$39,032	$37,831	$36,437	$35,276	$34,916	$34,447	$33,694	$33,003	$31,812	$30,875	$10,120	32.8%
Frio	$48,283	$51,045	$44,048	$43,298	$32,148	$29,277	$29,092	$28,743	$27,018	$25,692	$23,233	$25,050	**107.8%**
Gillespie	$35,259	$33,714	$32,249	$31,611	$30,853	$29,996	$29,560	$29,899	$29,250	$27,102	$25,662	$9,597	37.4%
Guadalupe	$40,641	$39,659	$38,225	$37,706	$36,542	$35,080	$34,682	$35,001	$33,757	$32,947	$31,459	$9,182	29.2%
Karnes	**$51,765**	**$46,750**	$40,511	$37,288	$33,706	$30,576	$29,283	$29,027	$27,166	$25,653	$24,421	$27,344	**112.0%**
Kendall	$46,017	$43,171	$40,697	$41,523	$38,627	$39,153	$36,507	$37,206	$35,944	$34,970	$31,162	$14,855	47.7%
Kerr	$39,309	$37,595	$36,225	$35,833	$35,074	$34,644	$34,084	$34,011	$32,709	$31,251	$29,181	$10,128	34.7%
McMullen	**$54,559**	**$53,283**	$47,778	$45,168	$42,102	$34,018	$32,187	$33,100	$33,637	$31,677	$29,495	$25,064	**85.0%**
Medina	$34,471	$34,484	$32,710	$31,704	$29,534	$28,509	$27,405	$27,155	$26,724	$25,727	$24,195	$10,276	42.5%
Wilson	$34,251	$33,296	$32,459	$31,189	$28,925	$27,820	$26,876	$26,201	$25,072	$24,774	$23,523	$10,728	45.6%

Source: U. S. Bureau of Labor Statistics

EMPLOYMENT

UNEMPLOYMENT RATE

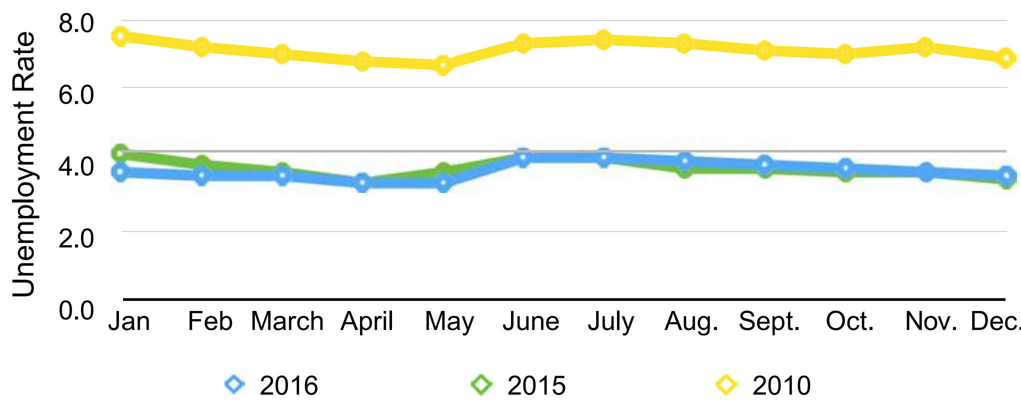
Annual unemployment rates in 2016 (3.8) and 2015 (3.8), for the 13-County AACOG regional area have remained lower than the State of Texas at 4.5% in 2015 and 4.6% in 2016.

The unemployment rate for the AACOG service region in the period 2010, 2015, and 2016 has fluctuated from a high of 7.6% in 2010 to the lowest at 3.4% in April of 2015 and 2016.

TWC unemployment data also shows the AACOG region's labor force increasing between 2015 and 2016. The 13-County region also shows a steady increase in the labor force since 2010.

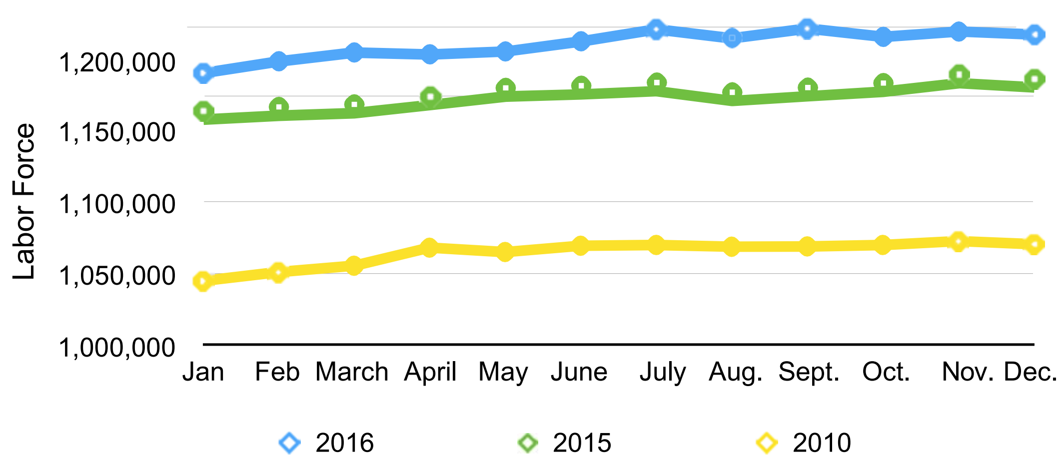
13-County Unemployment Rate

Figure 1



13-County Labor Force

Figure 2



EMPLOYMENT

INDUSTRY PRINCIPLE GROWTH SECTORS

According to Texas Workforce Commission's (TWC) Quarterly Census of Employment and Wages (QCEW) data, the AACOG 13-County's Industries have shown steady growth in each respective year between 2012 and 2016, the highest growth change occurred between 2013 and 2014 when the Natural Resources and Mining Industry average employment grew by 26.59%; however, subsequent years 2015 and 2016 show a decrease from 2014 of 23.89% average employment.

In the AACOG region, as evidenced by TWC's QCEW data (Table 13) for each respective year between 2012 and 2016, the largest Industries are Trade, Transportation and Utilities, Professional and Business Services, Education, Health Services, and Leisure and Hospitality Industries.

Average Employment by Industry

Table 13

Code	Industry	2012	2013	2014	2015	2016
1011	Natural Resources and Mining	8,438	10,551	14,373	12,627	10,939
1012	Construction	44,897	48,254	50,302	54,480	54,932
1013	Manufacturing	47,892	47,220	47,538	47,783	49,092
1021	Trade, Transportation and Utilities	170,284	174,597	181,917	188,694	195,417
1022	Information	21,092	21,959	22,389	22,147	21,467
1023	Financial Activities	71,876	75,519	78,284	81,009	83,593
1024	Professional and Business Services	113,043	116,115	122,226	124,301	130,402
1025	Education and Health Services	229,253	235,345	242,270	250,425	259,589
1026	Leisure and Hospitality	122,897	127,484	130,182	135,776	140,630
1027	Other Services	28,891	27,634	27,654	28,943	29,431
1028	Public Administration	43,599	44,015	44,249	44,081	44,659
1029	Unclassified	234	209	154	271	458
Total		***902,396***	***928,902***	***961,538***	***990,537***	***1,020,609***
% Annual Growth			***2.85%***	***3.39%***	***2.92%***	***2.95%***
Source: Texas Workforce Commission TRACER 2 QCEW 3rd Quarter - 13 County Area						

The US Census 2015 annual distribution of jobs by industry allows a drill down to county level data. The Census data on Table 14 shows the AACOG's 13 Counties heaviest concentration of employment may be found in the Mining, Construction, Manufacturing, Retail Trade, Health Care and Social Service, Accommodation and Food Services and Public Administration Industry Sectors.

Table 14

	Atascosa	Bandera	Bexar	Comal	Frio	Gillespie	Guadalupe
2015 Annual Industry Distribution of Jobs Total	**12,811**	**3,117**	**818,499**	**48,500**	**7,085**	**10,133**	**34,125**
Agriculture, Forestry, Fishing and Hunting	2.60%	4.50%	0.10%	0.10%	5.60%	0.70%	0.50%
Mining	11.90%	0.10%	0.60%	1.00%	16.00%	0.60%	0.60%
Utilities	1.80%	0.20%	0.60%	0.60%	0.60%	0.00%	1.10%
Construction	6.60%	7.70%	4.70%	10.00%	3.80%	9.30%	6.80%
Manufacturing	3.30%	1.00%	4.20%	6.10%	2.50%	9.30%	20.70%
Wholesale Trade	5.10%	0.00%	3.40%	5.00%	3.50%	2.80%	3.10%
Retail Trade	13.40%	11.90%	11.20%	14.80%	8.50%	17.40%	12.60%
Transportation & Warehousing	3.40%	2.40%	3.00%	0.30%	6.90%	0.30%	2.70%
Information	0.60%	0.90%	2.40%	1.30%	0.50%	1.10%	0.70%
Finance and Insurance	1.70%	3.00%	7.20%	1.90%	2.10%	2.90%	1.80%
Real Estate and Rental and Leasing	5.70%	0.90%	1.70%	1.10%	1.90%	1.20%	1.50%
Professional, Scientific, and Technical Services	2.10%	3.80%	5.10%	3.80%	0.00%	3.00%	2.60%
Management of Companies and Enterprises	0.00%	0.00%	1.20%	1.50%	0.00%		1.20%
Admin. & Support & Waste Mgt. & Rem. Services	2.50%	0.00%	7.20%	4.70%	8.50%	1.90%	3.00%
Educational Services	0.20%	0.00%	3.10%	1.10%	0.00%	0.70%	11.40%
Health Care and Social Services	9.00%	0.00%	15.60%	12.50%	0.00%	16.20%	10.50%
Arts, Entertainment, and Recreation	0.70%	0.50%	1.50%	3.50%	0.10%	1.20%	1.00%
Accommodation and Food Services	7.90%	17.10%	11.60%	12.80%	6.40%	16.20%	10.60%
Other Services (Except Public Administration)	2.10%	5.20%	2.90%	3.00%	1.20%	2.40%	3.30%
Public Administration	4.70%	5.50%	4.50%	2.20%	9.00%	2.80%	3.90%
Unallocated	0.10%	0.20%	0.00%	0.00%	0.00%	0.00%	0.00%
Source: U.S. Census Annual Industry Distribution of Jobs							

Table 14 Continued

	Karnes	Kendall	Kerr	McMullen	Medina	Wilson	13-County Total
2015 Annual Industry Distribution of Jobs Total	**5,839**	**14,020**	**17,603**	**664**	**9,363**	**7,663**	**989,422**
Agriculture, Forestry, Fishing and Hunting	0.80%	0.70%	0.90%	9.20%	2.30%	0.90%	28.90%
Mining	14.60%	1.00%	0.00%	27.70%	5.10%	4.60%	**83.80%**
Utilities	1.60%	0.20%	0.10%	0.00%	0.00%	0.60%	7.40%
Construction	2.10%	12.40%	6.40%	0.00%	8.60%	8.60%	**87.00%**
Manufacturing	4.50%	6.50%	5.60%	0.00%	1.60%	4.60%	**69.90%**
Wholesale Trade	3.70%	3.70%	1.40%	0.00%	2.90%	1.20%	35.80%
Retail Trade	14.20%	18.80%	17.80%	0.00%	13.80%	17.20%	**171.60%**
Transportation & Warehousing	4.00%	1.00%	1.20%	13.30%	0.40%	2.50%	41.40%
Information	0.00%	0.80%	1.30%	0.00%	0.60%	0.80%	11.00%
Finance and Insurance	2.00%	4.80%	2.70%	0.00%	3.50%	2.40%	36.00%
Real Estate and Rental and Leasing	1.60%	1.20%	1.40%	0.00%	0.40%	0.70%	19.30%
Professional, Scientific, and Technical Services	0.00%	7.00%	3.30%	0.00%	3.80%	2.90%	37.40%
Management of Companies and Enterprises	0.00%	0.40%	0.30%	0.00%		0.00%	4.60%
Admin. & Support & Waste Mgt. & Rem. Services	5.90%	3.40%	2.90%	0.00%	2.10%	0.00%	42.10%
Educational Services	10.20%	1.60%	3.00%	0.00%	0.00%	0.30%	31.60%
Health Care and Social Services	3.20%	9.30%	19.20%	0.00%	0.00%	10.60%	**106.10%**
Arts, Entertainment, and Recreation	0.00%	2.30%	1.30%	0.00%	0.80%	1.20%	14.10%
Accommodation and Food Services	0.00%	9.60%	12.70%	3.00%	10.20%	6.60%	**124.70%**
Other Services (Except Public Administration)	1.20%	3.30%	3.80%	1.10%	2.00%	2.10%	33.60%
Public Administration	4.00%	0.20%	3.30%	0.20%	9.30%	4.30%	**53.90%**
Unallocated	0.00%	0.10%	0.00%	0.00%	0.00%	0.10%	0.50%
Source: U.S. Census Annual Industry Distribution of Jobs							

EMPLOYMENT

TOP OCCUPATIONS BY NUMBER OF JOBS AND WAGES

To identify the top occupations for the 13 Counties, AACOG utilized Texas Workforce Commission's (TWC) long term projections of occupations that will likely (1) grow the fastest, (2) add the most jobs and/or have the (3) largest job openings over the projected 2014-2024 period.

The 13-County area has 49 occupations falling in one or more of the categories listed on pages 23-26. The 49 top occupations identified, represent 463,330 jobs or 43.50% of the 1,067,800 total occupations identified for the area in 2014. TWC projects the AACOG region will grow by 241,730 total jobs by 2024, with the 49 top occupations representing 119,920 or 49.77% of the total projected new jobs between 2014 and 2024.

Median hourly wages for the top occupations compared to the State of Texas, are higher for fourteen of the 49 occupations, three of the occupations have no identified wages and one occupation remained neutral. For the 49 top occupations, when median hourly wages are compared to the State of Texas, the total wages represent $42.30 less in median hourly wage compensation. Top Occupations that are paying the most in hourly wages include: Management, Business Financial Operations, Computer & Mathematical, Healthcare Practitioners & Technical and Healthcare Support Occupations.

Table 15

Occ Code	Occupational Title	2014 Employment	2024 Projected Employment	Change	% Change	Annual Openings due to Growth	Annual Openings due to Replace-ments	Total Annual Average Openings	AACOG Mean Hourly Wage 2015	Texas Mean Hourly Wage 2015	AACOG vs Texas
Management Occupations											
11-3021	Computer & Information Systems Managers	1,180	1,570	390	**33.1%**	40	15	55	$69.96	$71.45	-$1.49
11-9013	Farmers, Ranchers, & Other Agricultural Managers	20,160	22,040	1,880	9.3%	190	345	**535**	$24.03	$27.75	-$3.72
11-1021	General & Operations Managers	13,540	16,600	**3,060**	22.6%	305	345	650	$55.56	$61.99	-$6.43
Business Financial Operations & Computer & Mathematical Occupations											
13-2011	Accountants & Auditors	8,830	11,130	2,300	26.0%	230	235	**465**	$34.40	$37.73	-$3.33
15-1121	Computer Systems Analysts	2,620	3,570	950	**36.3%**	95	35	130	$44.98	$45.21	-$0.23
15-1122	Information Security Analysts	1,190	1,700	510	**42.9%**	50	15	65	$41.10	$43.49	-$2.39
15-1132	Software Developers, Applications	4,740	6,560	1,820	**38.4%**	185	70	255	**$48.40**	$47.99	$0.41
15-1134	Web Developers	850	1,190	340	**40.0%**	35	10	45	$30.99	$33.08	-$2.09
15-2031	Operations Research Analysts	1,010	1,470	460	**45.5%**	45	20	65	**$42.87**	$40.49	$2.38
Community/Social Service Occupations & Education, Training & Library Occupations											
21-1022	Healthcare Social Workers	760	1,010	250	**32.9%**	25	20	45	$26.69	$26.69	$0.00
25-2021	Elementary School Teachers, Ex. Special Education	12,540	16,540	**4,000**	31.9%	400	275	675	-	-	-
25-2031	Secondary School Teachers, Ex Special/ Career/Technical Ed	8,650	11,390	**2,740**	31.7%	275	205	480	-	-	-
25-3021	Self-Enrichment Education Teachers	1,490	1,990	500	**33.6%**	50	30	80	$16.50	$19.04	-$2.54
25-9041	Teacher Assistants	8,180	10,640	**2,460**	30.1%	245	195	440	-	-	-

Table 15

Occ Code	Occupational Title	2014 Employment	2024 Projected Employment	Change	% Change	Annual Openings due to Growth	Annual Openings due to Replace-ments	Total Annual Average Openings	AACOG Mean Hourly Wage 2015	Texas Mean Hourly Wage 2015	AACOG vs Texas
Healthcare Practioners & Technical Occupations & Healthcare Support Occupations & Personal Care & Service Occupations											
29-1071	Physician Assistants	610	860	250	41.0%	25	15	40	$43.78	$47.87	-$4.09
29-1127	Speech-Language Pathologists	1,280	1,700	420	32.8%	40	30	70	$35.98	$37.66	-$1.68
29-1141	Registered Nurses	18,980	24,780	5,800	30.6%	580	450	1,030	$31.85	$33.60	-$1.75
29-1171	Nurse Practitioners	650	970	320	49.2%	30	15	45	$47.35	$50.59	-$3.24
29-2055	Surgical Technologists	1,010	1,340	330	32.7%	35	10	45	$18.68	$21.68	-$3.00
29-2056	Veterinary Technologists & Technicians	980	1,310	330	33.7%	35	10	45	$13.55	$14.30	-$0.75
29-2099	Health Technologists & Technicians, All Other	930	1,250	320	34.4%	30	10	40	$18.79	$20.21	-$1.42
31-1011	Home Health Aides	4,710	6,400	1,690	35.9%	170	105	275	**$10.51**	$9.59	$0.92
31-2011	Occupational Therapy Assistants	500	680	180	36.0%	20	15	35	**$34.90**	$34.18	$0.72
31-2021	Physical Therapist Assistants	780	1,100	320	41.0%	30	25	55	$34.67	$35.01	-$0.34
31-2022	Physical Therapist Aides	550	750	200	36.4%	20	15	35	**$11.74**	$11.72	$0.02
31-9092	Medical Assistants	5,720	7,570	1,850	32.3%	185	120	305	$13.94	$14.03	-$0.09
39-9011	Childcare Workers	8,790	10,860	2,070	23.5%	205	260	465	**$10.21**	$9.73	$0.48
39-9021	Personal Care Aides	22,580	30,270	7,690	34.1%	770	185	955	$8.50	$8.65	-$0.15

Table 15

Occ Code	Occupational Title	2014 Employment	2024 Projected Employment	Change	% Change	Annual Openings due to Growth	Annual Openings due to Replace-ments	Total Annual Average Openings	AACOG Mean Hourly Wage 2015	Texas Mean Hourly Wage 2015	AACOG vs Texas
Food Preparation and Service Related and Building & Grounds Cleaning & Maintenance Occupations											
35-1012	First-Line Supervisors of Food Preparation & Serving Workers	7,720	10,380	2,660	34.5%	265	230	495	$16.59	$17.06	-$0.47
35-2014	Cooks, Restaurant	9,330	13,100	3,770	40.4%	375	245	620	$10.65	$11.08	-$0.43
35-3021	Combined Food Preparation & Serving Workers, Incl. Fast Food	27,640	37,470	9,830	35.6%	980	895	1,875	$8.82	$8.97	-$0.15
35-3031	Waiters & Waitresses	19,810	24,790	4,980	25.1%	500	955	1,455	**$11.02**	$10.43	$0.59
37-2011	Janitors&Cleaners,Ex. Maids & Housekeeping Cleaners	17,280	22,240	4,960	28.7%	495	345	840	**$10.71**	$10.52	$0.19
Construction & Extraction Occupations & Installation, Maintenance & Repair Occupations											
47-2061	Construction Laborers	8,290	10,560	2,270	27.4%	225	165	390	$13.34	$14.07	-$0.73
49-3031	Bus & Truck Mechanics & Diesel Engine Specialists	2,270	3,130	860	37.9%	85	40	125	**$21.73**	$21.34	$0.39
49-9041	Industrial Machinery Mechanics	1,830	2,580	750	41.0%	75	50	125	$24.42	$25.05	-$0.63
49-9071	Maintenance & Repair Workers, General	9,720	11,980	2,260	23.3%	225	255	480	$15.78	$16.97	-$1.19
Transportation & Material Moving Occupations											
53-3032	Heavy & Tractor-Trailer Truck Drivers	13,720	16,480	2,760	20.1%	275	235	510	**$20.79**	$19.85	$0.94
53-7062	Laborers & Freight, Stock, & Material Movers, Hand	11,430	13,830	2,400	21.0%	240	340	580	$12.01	$12.70	-$0.69

Table 15

Occ Code	Occupational Title	2014 Employment	2024 Projected Employment	Change	% Change	Annual Openings due to Growth	Annual Openings due to Replacements	Total Annual Average Openings	AACOG Mean Hourly Wage 2015	Texas Mean Hourly Wage 2015	AACOG vs Texas
Sales & Related Occupations											
41-1011	First-Line Supervisors of Retail Sales Workers	11,830	14,150	2,320	19.6%	230	265	495	**$22.57**	$22.22	$0.35
41-2011	Cashiers	23,560	27,670	4,110	17.4%	410	1,000	1,410	**$9.80**	$9.69	$0.11
41-2031	Retail Salespersons	34,490	43,050	8,560	24.8%	855	1,195	2,050	**$13.22**	$12.84	$0.38
41-3021	Insurance Sales Agents	9,000	10,910	1,910	21.2%	190	235	425	$23.77	$28.79	-$5.02
Office & Administrative Support Occupations											
43-1011	First-Line Supervisors of Office & Admin Support Workers	9,910	12,150	2,240	22.6%	225	150	375	$26.50	$28.59	-$2.09
43-4051	Customer Service Representatives	29,410	37,200	7,790	26.5%	780	725	1,505	$14.96	$15.74	-$0.78
43-5081	Stock Clerks & Order Fillers	13,330	16,090	2,760	20.7%	275	425	700	$12.32	$12.35	-$0.03
43-6013	Medical Secretaries	7,580	10,000	2,420	31.9%	240	80	320	$14.42	$15.07	-$0.65
43-6014	Secretaries & Admin Assistants, Ex. Legal/ Medical/Executive	15,320	17,920	2,600	17.0%	260	160	420	$15.57	$15.76	-$0.19
43-9061	Office Clerks, General	27,230	31,900	4,670	17.2%	465	585	1,050	**$16.08**	$15.97	$0.11

HOUSING

San Antonio's improving economy and growing population have been pushing up home sales, according to analysts of the local real estate industry. Unlike other parts of Texas, the city's housing market hasn't been battered by the slump in the oil industry.

The inventory of available homes — measured by the average time it takes for a home on the market to be sold if no new homes are listed — was at 3.7 months in May, well below the six months that indicates a balance between buyers and sellers.

The San Antonio area is on track to beat last year's record high for home sales due to the robust local economy and low interest rates, but the pace of growth shows signs of easing to a normal level.

While population growth in rural communities are often slower than urban communities, housing needs in these communities are just as urgent. Generally stagnant incomes plague rural Texas. Major portions of the population are elderly and have lower incomes. These economic and demographic conditions, coupled with an aging and deteriorating housing stock, add up to a pressing need for decent and affordable housing.

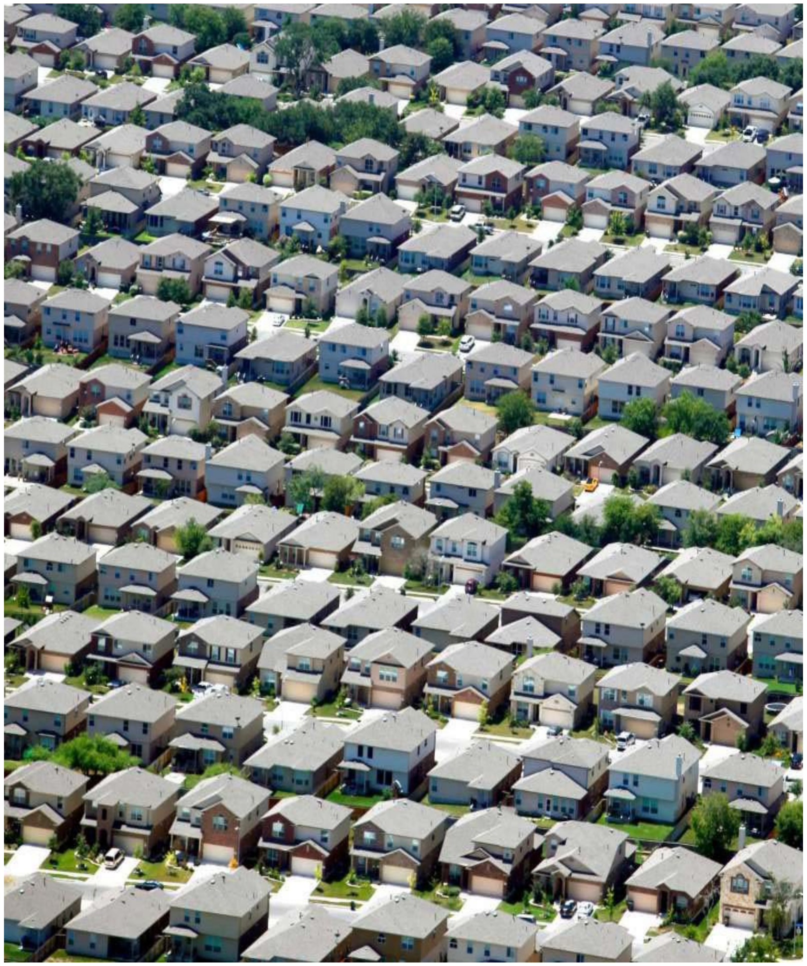


Photo: William Luther /San Antonio Express-News

ECONOMIC RESILIENCY

The goal of the AACOG region and its partners is to plan for a resilient region that will anticipate threats and economic risk, develops resources to reduce their impact, responds appropriately, and ultimately leads the region to recovery. This resilient approach extends beyond emergency responsiveness by utilizing available resources for planning and utilizing regional leadership to address vulnerabilities and to build and support vibrant, healthy communities.

The capacity to recover from an economic shock can be strengthened by addressing the following capacity measures:

1. **Economic diversification**: Economic diversification measures the degree to which economic activity is spread across sectors of an economy. When economic activity is concentrated in relatively few sectors, the overall regional economy is more vulnerable to problems in any of those sectors.
2. **Improved Business climate** and improving access to jobs through affordable housing to include transportation choices. Strong support of entrepreneurship that will take advantage of new market trends and demographic needs; revitalizing downtowns and anchors for development.
3. **Regional affordability/Housing:** Considering housing affordability including comparing the cost of housing to the level of income available to pay for that housing.
4. **Income equality**: Income equality measures how evenly income is distributed across a population and considers how helping localities link assets throughout the region can improve equality.

Through innovation, adaptation, investing in local assets and connecting people, the AACOG region can enhance economic stability and competitiveness which will result in long-term success, viability and durability of the region's economy.

ECONOMIC RESILIENCY

Regional Business Recovery and Resiliency

In its role as a leader in promoting and enhancing community and regional resilience, AACOG will work with the private sector and its representatives to ensure that the business community has a disaster plan that includes the means by which businesses can recover and resume operations in a post-disaster environment. AACOG will strengthen relationships with the public and private sectors in each county so that it can better serve the areas. With the assistance of the emergency management teams and economic development groups in each area, AACOG will assist the business community respond to protect life, business environment, and property during and after disaster emergencies.

Planning and Preparation

During a disaster situation and recovery period, businesses may have to be self-sufficient until governmental assistance is available. In the interim, businesses need to be able to neutralize the situation to minimize the impact of disruption to the business operations. AACOG will work with local communities and their business sectors to identify resources that assist with planning the solutions, resources and options for disaster recovery for the businesses affected by natural or man-made disasters.

- **Planning – General Business Disaster Recovery Plan vs. Individual Business Disaster Recovery Plan**
    - Each county and/or community will need to decide whether to have a general business disaster recovery plan.
    - Each county and/or community will need to survey their business community/ies on whether they have their own disaster recovery plan.
    - The business disaster recovery plan should include:
        - Pre-disaster preparedness:
            - Prepare to lessen the impact of the disaster
            - Identify types of emergencies that may impact operations
            - Identify and understand situations which may escalate emergencies
            - Provide training to employees on how and what to do in case of a disaster
        - Post-disaster planning and implementation:
            - Ensure safety of employees
            - Ensure continuation, recovery or re-instatement of business operations

- **Development of Networks**
    - Each county and/or community will need to develop a communications network within the county, community, neighborhood, and business areas to use in pre-disaster preparedness and post-disaster planning and implementation.
    - Each county and/or community will need to designate a group or individual to maintain communications with businesses

ECONOMIC RESILIENCY

during and after the disaster.

- Each county and/or community, with AACOG's assistance, will establish relationships and partnerships with state and federal agencies to assist with business recovery after a disaster.
- Each county and/or community will need to follow the local emergency management plan.

Create a Resilient Regional Economy

As communities recover from the COVID-19 Pandemic and the impacts the pandemic had to the economy, the Alamo Region proposes to engage each member government of the region to participate in various forums, workshops, meetings to better plan and implement strategies that will aid in the response to, recovery from and preparation for COVID-19, future pandemics and economic downturns.

AACOG, as the EDA-designated Economic Development District (EDD) for the region, will organize workshops for its member governments to assist with strategic planning, economic development, and economic recovery.

With the assistance of member governments, AACOG will coordinate research and information efforts to provide the members with the tools necessary to recover from pandemics and economic downturns. The Alamo Region will work on developing an annual workshop on economic resiliency. The workshop will look at public-private partnership development to stimulate and sustain economic development. In addition, the workshop will serve as a means to identify barriers to economic recovery. Overall, the workshop will serve as a resource for all members and participants to share information and best practices.

Other workshops to complement an annual economic resiliency workshop may include a best practices workshop with speakers from other regions in Texas. A workshop on intergovernmental regulations and coordination may serve to spotlight specific laws affecting strategic and economic development planning. Infrastructure is a critical element of all economic development activity; therefore, a workshop strictly on infrastructure will serve to provide information and resources to member governments so that they are better prepared for weather-related impacts to their economies.

WORK LOCATION AND TRAVEL TIME

POPULATION WORKING AT HOME

According to the US Census/American FactFinder, the number of AACOG 13-county region workers 16 and over, working at home increased between 2010 and 2015 by 28.07% or 12,906 persons. In the AACOG region's respective counties, there were eight counties that showed increases from 2010 to 2015 in the number of persons estimated to work at home, the largest increase at 64.75% occurred in Atascosa County.

MEAN WORK TRAVEL TIME

The mean travel time to work for the 13-County region averaged 25.33 minutes in 2015, slightly lower when compared to the State of Texas at 25.6 minutes. The 2015 average shows a 2.74 minute decrease from 2010 to 2015 mean travel time. Within each respective county, the mean travel time to work between 2010 and 2015, fluctuated slightly either in an increase or decrease, the largest percentage change occurred in McMullen County, which decreased in travel time to work by 9 minutes.

Work Location and Mean Travel Time Table 16

AACOG 13 Counties	Worked at Home 2010	Worked at home 2015	% change		Mean travel time to work (minutes) 2010	Mean travel time to work (minutes) 2015
Atascosa	357	1,013	64.75%		32.7	29.4
Bandera	596	480	-19.46		32.8	35
Bexar	22,907	33,128	30.85%		24	24.5
Comal	2,634	4,040	34.80%		29	30.3
Frio	27	39	30.76%		23	17.9
Gillespie	1,022	549	-46.28%		20	19.4
Guadalupe	1,840	2,502	26.45%		24.8	25.3
Karnes	199	128	-35.67%		25.6	23.6
Kendall	1,246	1,243	-0.20%		25.9	29.5
Kerr	1,077	1,097	18.23%		18.9	19.7
McMullen	42	13	-69.04%		20.8	11.8
Medina	346	621	44.28%		29	30
Wilson	778	1,124	30.78%		32.5	32.9
13-County Total	33,071	45,977	28.07%		28.07	25.33
State of Texas						25.6
Source: US Census Bureau						

HEALTH

HEALTH

According to a 2016 Healthcare and Bioscience Economic Impact Study published by the Greater San Antonio Chamber of Commerce, the Bioscience and Healthcare Cluster includes both direct and indirect healthcare services and continues to be one of the region's biggest industries. Indeed, one out of every six residents works either directly or indirectly in the Bioscience and Healthcare industry. Direct healthcare services are those that provide care directly to patients. These services include hospitals, physicians' offices, nursing homes, offices and clinics of other healthcare providers, and various other outpatient and ambulatory care settings.

Indirect related components complement and support the provision of medical and healthcare. These indirect services are provided by health insurance carriers, pharmaceutical companies, medical equipment producers and manufacturers, civilian and military medical education, biomedical research organizations, residential care and social service providers, and a variety of related endeavors.

For the region, the estimated total economic impact of both direct and indirect healthcare services was $37 billion in 2015. This estimate shows significant growth from years past. In 2009, the comprehensive estimate of overall economic impact was $24.5 billion, a 51% increase. This comprehensive estimate includes the salaries of 172,084 employees in 2015. This estimate shows an increase of 49,355 jobs over the past decade, an increase of 46%. Additionally, jobs in this cluster, on average, have an annual salary that is 11.5% higher than the average amongst other employment sectors in the region.

HEALTH

Demand for healthcare services in the region is complex, characterized by (1) significant numbers of uninsured residents and (2) challenging behavioral and physical health factors vary county to county.

The region's population is characterized by a disproportionate number of residents without health insurance. All counties except Kendall and Wilson counties boast higher percentages of uninsured than the national average of 14.2% (2014). The only county in the region to fare worse than the 21.9% (2014) for state of Texas overall is Frio county, with an uninsured rate of 27.1%. Refer to the Percentage of Uninsured Population by County (2014) Table 17 for a comprehensive list of uninsured percentages.

Evaluation of behavioral and physical health characteristics for the region also highlights regional challenges, including:

- 5 of 13 counties have anAdult Obesity index that is higher than Texas
- 6 of 13 counties are characterized by aPhysical Inactivity index higher than Texas
- 6 of 13 counties have the Excessive Drinking index higher than Texas
- 9 of 13 counties have a Primary Care Physician to Patient ratio higher than Texas
- 8 of 13 counties have Air Pollution index higher than Texas

Refer to the Behavioral and Physical Health Factors Index Table 18 on next page for additional details.

Percentage of Uninsured Population by County (2014)

Table 17

County	Uninsured Population (Percent)
Atascosa	20.4
Bandera	21.1
Bexar	19.1
Comal	15.7
Frio	**27.1**
Gillespie	18.1
Guadalupe	16.1
Karnes	15
Kendall	**13.5**
Kerr	19.3
Medina	16.3
McMullen	18
Wilson	14.2
State of Texas	14.2
U.S.	21.9

Source: U. S. Census Bureau 2014 American Community Survey, 5-Year Estimates

HEALTH

Behavioral and Physical Health Factors Index

Table 18

County	Adult Smoking	Adult Obesity	Physical Inactivity	Excessive Drinking	Primary Care Physicians	Air Pollution - Particulate Matter	Severe Housing Problems	Long Commute - Driving Alone
Atascosa	15	28	30	16	4,340:1	8.8	18	44
Bandera	13	27	24	17	4,180:1	8.2	11	55
Bexar	13	27	21	17	1,380:1	9.9	18	32
Comal	13	27	21	18	1,330:1	9.6	14	46
Frio	18	28	22	17	4,630:1	7.5	23	22
Gillespie	13	27	23	15	800:01	7.7	14	20
Guadalupe	14	31	22	19	3,350:1	9.7	12	38
Karnes	18	29	25	17	4,970:1	8	17	29
Kendall	13	27	20	18	1,440:1	8.6	18	47
Kerr	15	27	25	15	1,180:1	7.7	18	18
Medina	14	32	24	18	3,990:1	8.8	15	51
McMullen	14	32	27	18	810:01	7.2	2	11
Wilson	14	31	22	18	2,580:1	9	13	58
Texas	15	28	23	17	1,670:1	8	18	36

Source: University of Wisconsin Population Health Institute, County Health

INFRASTRUCTURE

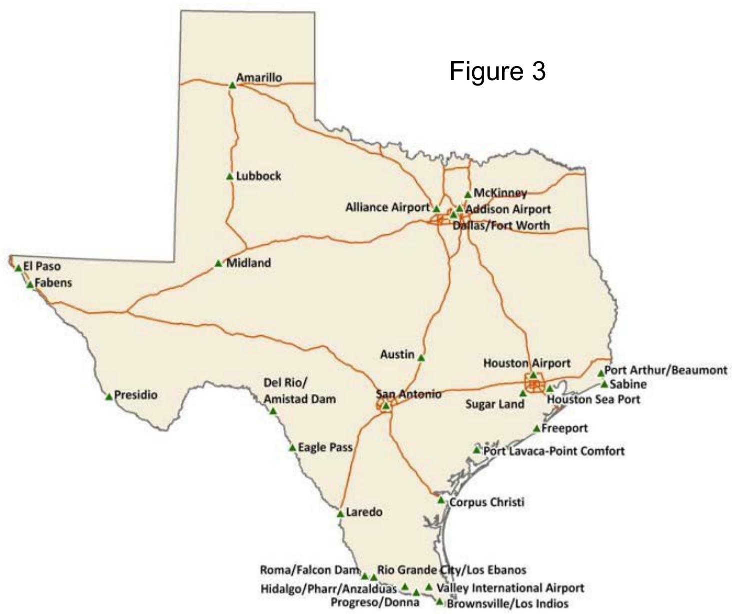
INFRASTRUCTURE

Infrastructure of the region continues to be one of the area's largest advantages. Being located at the junction of the state's two largest corridors, IH 35 and IH 10, provides a dramatic advantage to the trade industry. The presence of both an international airport and a large multimodal trade facility located near to the US-Mexico border, makes San Antonio a very important hub for dispersion of goods both to and from the United States. Total trade between the U.S. and Mexico was $525 billion in 2016; $294 billion in imports and $231 billion in exports. https://www.census.gov/foreign-trade/statistics/highlights/top/top1612yr.html

INTERSTATE AND STATE HIGHWAYS

There are 8 major interstate and state highways that service the Alamo area. These include IH 35, IH 10, IH 37, US Highway 90, US Highway 181, US Highway 281, Loop 410 and Loop 1604. These highways serve to transport both goods and commuters throughout the region and as the population grows, so does the need for upgrades to this infrastructure. Many of the major highways in the region are currently experiencing enhancement projects or have projects scheduled to begin this fiscal year. US Highway 281, LP 1604 and Loop 410, will have construction of a partial frontage road, ramps, and intersection improvements.

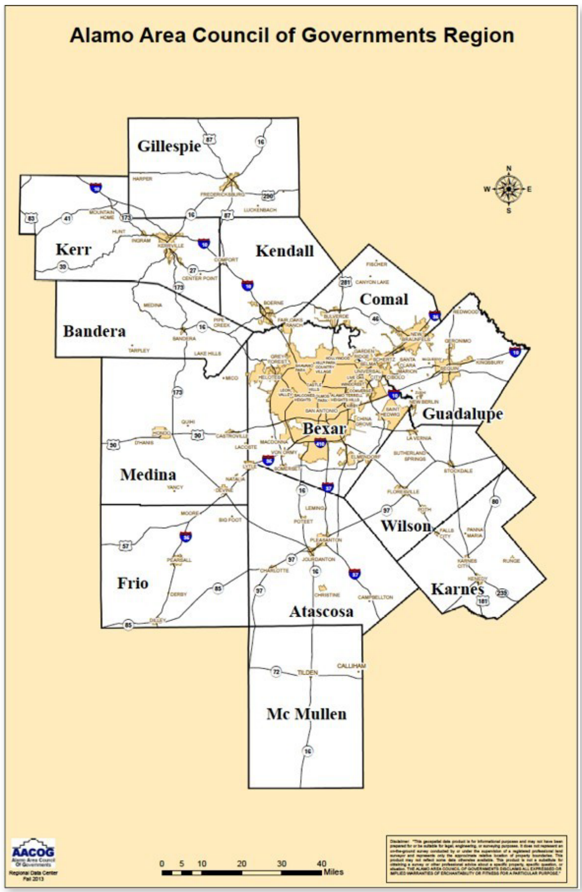
Figure 3



Source: Texas Wide Open for Business

INFRASTRUCTURE

Figure 4



PUBLIC TRANSIT

There are two main providers of public transit in the region, VIA Metropolitan Transit (VIA) (www.viainfo.net) and Alamo Regional Transit (ART) operated by the Alamo Area Council of Governments (www.aacog.com/art).

VIA provides affordable transportation to 98% of Bexar County, including unincorporated parts of Bexar County and the following municipalities: Alamo Heights, Balcones Heights, Castle Hills, China Grove, Converse, Elmendorf, Kirby, Leon Valley, Olmos Park, San Antonio, Shavano Park, St. Hedwig, Terrell Hills, and portions of Cibolo within Bexar County. In 2016, VIA had a total ridership of 38,334,650 on the scheduled lines and 1,174,104 on VIATrans.

Alamo Regional Transit (ART) provides public transit services to the rural counties of the region in an on- demand basis. ART provides services to Atascosa, Bandera, Comal, Frio, Gillespie, Guadalupe, Karnes, Kendall, Kerr, Medina, McMullen, and Wilson.

In 2016, ART provided 89,878 rides to rural residents.

INFRASTRUCTURE

AIRPORTS

San Antonio International Airport (SAT) was ranked 45th in commercial airports in 2013 by the Federal Aviation Administration with a total of 4,005,874 enplanements. The Economic output for this airport in 2011 was nearly $6 billion and it employed roughly 62,000 people.

Stinson Municipal Airfield is the primary airfield for light aircraft in the region. The Economic output for this airfield in 2011 was nearly $24 million and it employed approximately 240 people.

Economic Contributions of Regional Airfields (2011)

Table 19

Airfield	Economic	Labor Income	Jobs
Castroville Municipal	$2,319,937	$657,319	17.8
Devine Municipal	$1,300,293	$220,786	8.6
Gillespie County	$2,469,137	$1,049,059	32.4
South Texas Regional (Hondo)	$31,491,584	$8,211,611	298.8
Kerrville Municipal / L. Schreiner	$44,988,676	$12,093,356	309.6
New Braunfels Municipal	$25,631,652	$7,077,190	120
McKinley Field (Pearsall)	$4,824,935	$1,462,517	26.8
Stinson Municipal (San Antonio)	$23,850,456	$8,941,676	240.4
San Antonio International	$6,434,683,363	$2,055,624,658	61,654

Source Economic Impact 2011: General Aviation in Texas, Texas Department of Transportation, www.txdot.gov/business/aviation/eco_impact_aviation.htm

Port San Antonio is a multimodal trade facility that is centrally located near 3 major highways (IH35, IH 10 and IH 37 in Bexar County). It spans 1,900 acres and possesses a 350-acre rail-served site and a 11,500-foot runway capable of handling large aircraft. The Port allows for the importation of trade goods via three modes of transportation, added $2.9 billion to the Gross Domestic Product (GDP) in Texas and employed 27,000 people in 2015. (Texas Comptroller: Port of Entry: San Antonio - Port San Antonio Impact to the Texas Economy, 2015)

INFRASTRUCTURE

BROADBAND

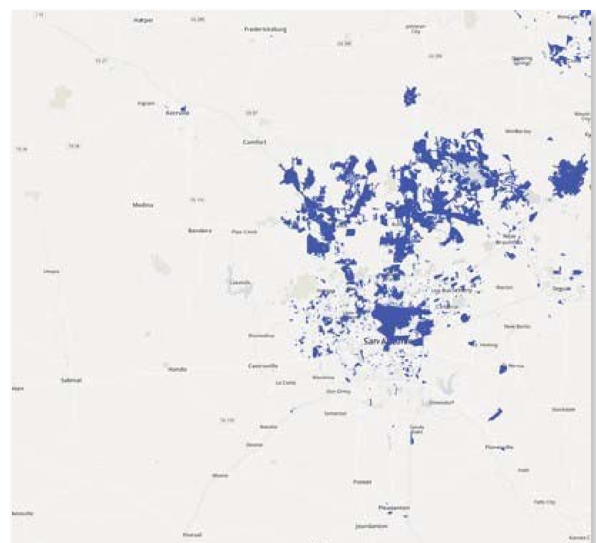
There is increasing evidence that access to broadband internet has positive impacts on economic growth of a region. Impressively, San Antonio was ranked 10th in the U.S. and 35th in the world for fastest internet speeds by Nomad List; however, broadband internet access is most heavily concentrated in the areas of the Alamo region that are more urbanized and affluent. (https://nomadlist.com/cities-in-north-america#sort=internet_speed&view=list)

Access to high speed internet is no longer a luxury. It has become a necessity in the modern world and a challenge in rural areas. Only 55 percent of people living in rural areas have access to speeds that qualify as broadband, compared to 94 percent of the urban population. It is still more efficient for telecommunications companies to install new communications lines in areas with high population density. This is basic economics related to how many customers there are to share fixed installation costs. There are typically around 2,000 people per square mile in urban areas versus 10 in some rural areas.

Broadband Internet Access: Maximum Advertised Speed Available 25+ Mbps (2014)

Source: National Broadband Map

Figure 5



MILITARY AND LAW ENFORCEMENT

The Alamo Region is home to a very large military and law enforcement community. There is no question as to why San Antonio is referred to as Military City USA. The region has one of the largest active and retired military populations in the country. San Antonio Military Medical Center (SAMMC) serves as the largest and most robust Tier 1 military healthcare organization within the Department of Defense (DOD)

MILITARY

This region is home to three major military installations; Randolph Air Force Base, Lackland Air Force Base, and Fort Sam Houston, which comprise Joint Base San Antonio (JBSA). The economic impact of Joint Base San Antonio is very important to the region.

JBSA has a total output of $48.7 billion and employs 282,995 people. These 282,995 employees, while not considered civilian employees of the region, bring with them a disposable personal income of more than $17 billion that contributes to the overall economy of the region.

Joint Base San Antonio; Estimated Contribution to the Texas Economy

Table 20

Estimated Contributions of Joint Base San Antonio to the Texas Economy, 2015	
Total Output	$48,700,000,000
Total Employment	282,995
Gross Domestic Product	$28,799,441,000
Disposable Personal Income	$17,081,991,000
Source: Texas Comptroller of Public Accounts Data Analysis and Transparency Division	

MILITARY AND LAW ENFORCEMENT

LAW ENFORCEMENT

The Alamo Region has a large law enforcement presence, with the largest concentration being in the San Antonio Metropolitan Area. The San Antonio Police Department was ranked 2nd in the list of top 25 cities for police officers by Police Link in 2015. The main qualifiers used for this ranking were the cities growth rate, average salaries, cost of living and average commute time. The starting salary for academy graduates is $55,000 annually, which is the second highest starting salary in the state.

BORDER PATROL

While the counties in the Alamo Region do not lie directly on the border between the U.S. and Mexico, the region, more specifically the San Antonio Metropolitan Area, serves as a major hub for undocumented persons seeking to travel further into the United States. IH 10 is a major corridor for undocumented persons from Del Rio, Laredo, and Eagle Pass to come into the region, at which point they can continue on to Houston or use one of the other major highways in the region to access other parts of the state and country. Due to this, the Border Patrol has a strong presence in this area.

Police Officers per Capita (2011) Table 21

County	Population 2010	Total Law Enforcement Employees	Total Officers	Total Civilians
Atascosa	44,911	79	32	47
Bandera	20,485	66	26	40
Bexar	1,714,774	1,675	527	1148
Comal	108,472	247	124	123
Frio	17,271	20	12	8
Gillespie	24,837	42	28	14
Guadalupe	131,533	210	85	125
Karnes	14,824	20	11	8
Kendall	33,410	74	48	26
Kerr	49,625	94	45	49
Medina	46,006	70	27	43
McMullen	707	6	5	1
Wilson	42,918	69	26	43

Source: Federal Bureau of Investigations

NATURALRESOURCES

NATURAL RESOURCES

Air Quality

Air quality is a health concern in the San Antonio area that requires a shared commitment from local agencies, businesses, and individuals to ensure the region meets national air quality standards and to protect the community and the environment.

The U.S. Environmental Protection Agency (EPA) sets thresholds for ozone and five other air pollutants considered harmful to public health and the environment as required by the Clean Air Act. Collectively, these thresholds are referred to as the National Ambient Air Quality Standards (NAAQS). The standards are subject to periodic review and may be modified if it is determined that they do not provide adequate protection of health and the environment. In 2015, the United States Environmental Protection Agency (EPA) issued a final rule to revise the primary 8-hour national ambient air quality standard (NAAQS) for ground-level ozone at 0.075 parts per million (ppm) (2008 standard) to 0.70 or 70 parts per billion. The final rule became effective on December 28, 2015.

In addition to health and environmental issues, the consequences of failing to meet the NAAQS threshold for ozone include the addition of mobility conformity, additional permitting, and control strategy requirements that impact would economic growth in the area's industry and manufacturing sectors.

According a report commissioned by AACOG, economic costs of a nonattainment designation may range from $3.2 billion to $27.5 billion per year under the lowest level marginal designation and could increase to levels ranging from $7.1 billion to $36.2 billion if the region is given a moderate nonattainment classification.

Eagle Ford Shale

Of the 14 oil and natural gas-producing counties, five are in the AACOG region: Atascosa, Frio, Karnes, McMullen, and Wilson with Bexar County serving as a staging area for the oil and gas play.

The Eagle Ford Shale play produced $123 billion in economic impact and created more than 191,000 jobs in Bexar and 20 other counties during the height of the oil boom in 2014 when prices peaked above $100 per barrel. Despite the fall of oil prices in January 2106, the Eagle Ford held on to $49.8 billion of economic impact and 108,000 jobs during that lean period.

NATURALRESOURCES

NATURAL RESOURCES

The Alamo region sits on the cusp of four of Texas' twelve Level III Eco-regions; the Edward's Plateau, the Texas Blackland Prairie, the East Texas Central Plains, and the Southern Texas Plains regions. Each of these eco-regions possess a unique makeup of flora, fauna, and geological features, which makes them unique from one another. The unique beauty and close proximity of each of these eco-regions is attractive to nature lovers of all kinds. From hikers, to fisherman, to birders, to hunters, to naturalists, each of these eco-regions possess something unique for all.

The Alamo Region contains only one national park, the San Antonio Missions National Park, but has a wealth of state parks and regional parks that perfectly display and embody the natural beauty of this region. The natural beauty and history of these parks draws visitors from all over the state and country into the region. The presence of these visitors serves to stimulate the local economy of the region via direct visitor spending at parks and other businesses in the area and through tax revenue.

The Alamo, the region's most famous mission, is the number one tourist attraction in Texas and attracts roughly 3 million visitors a year. This patronage helps fuel the ever-growing hospitality industry that has an estimated impact of $13 billion annually.

Visitor Spending Effects National Parks

Table 22

Effect	2012	2013	2014	2015	2016
Visitor Spending	$33.1 M	$28.8 M	$78.3 M	$75.7 M	$79.5 M
Jobs to Local Gateway Economies	480K	412K	1.3M	1.2M	1.3M
Labor Income	$14.1 M	$12.2 M	$38.1 M	$36.1 M	$38.6 M
Economic Output	$41.9 M	$36.4 M	$108.3 M	$105.1 M	$110.7 M

Source: U.S. National Park Service

NATURALRESOURCES

The region also contains a wealth of water resources that support the ecosystem. The Edwards Aquifer is a unique groundwater system and one of the most prolific artesian aquifers in the world. It is one of the greatest natural resources on Earth, serving the diverse agricultural, industrial, recreational, and domestic needs of almost two million users in south central Texas.

The Economic Contributions of State Parks — Table 23

Park	Labor Income	Value Added	Output	Job	Sales Tax
Enchanted Rock State Park	$1,999,083	$3,877,591	$6,579,385	88.8	$244,245
Guadalupe River State Park/ Honey Creek State Natural Area	$1,268,347	$2,298,378	$3,696,253	45.1	$118,396
Government Canyon State Natural Area	$384,558	$749,241	$1,209,477	10.9	$18,857
Old Tunnel State Park	$253,047	$491,997	$846,583	11.2	$33,258
Hill Country - Louise Merrick Unit State Natural Area	$173,302	$363,682	$655,939	7	$12,744
Lyndon B. Johnson State Park/ State Historic Site	$1,076,616	$2,184,179	$3,798,326	46.7	$127,769
Lost Maples State Natural Area	$623,104	$1,111,962	$1,925,374	23.4	$65,003
Choke Canyon	$272,981	$707,166	$1,258,478	12	$20,973
Source: Texas Parks and Wildlife					

TOURISM

TOURISM

Another local attraction that draws a large number of visitors into the region is the beautiful San Antonio Riverwalk. The San Antonio Riverwalk is a series of walkways and bridges that line the banks along 2.5 miles of the San Antonio River. The Riverwalk is brimming with shopping, dining and unique entertainment opportunities. It displays the natural beauty and intoxicating culture of the region and contributes significantly to the overall economic health of the Alamo Region.

Annual Economic Impact of the River Walk (2014)

Table 24

Impact Type	Employment	Income	Output
Direct Effect	21,294	$571,718,279	$1,807,908,085
Indirect Effect	5,086	$231,329,203	$690,928,900
Induced Effect	4,698	$198,146,016	$597,066,199
Total Effect	31,077	$1,001,193,524	$3,095,903,185

Source: San Antonio River Authority

The region is home to many festivals the largest and most famous being Fiesta San Antonio. Fiesta San Antonio is an annual festival held each April. The festival spans 10 days and has over 100 events including the world- famous Battle of Flowers Parade and Night in Old San Antonio. The economic impact of Fiesta San Antonio as a whole is $284 million annually from approximately 3.5 million patrons. Wurstfest is an annual festival held in New Braunfels that celebrates the rich German heritage. Wurstfest was voted the 2nd best Octoberfest in the nation by USA Today, and attracts over 100,000 patrons annually and $3 million impact.

SECTION III: SWOT

Strengths, Weaknesses, Opportunities, and Threats

The SWOT analysis is a useful framework for analyzing an organization's strengths and weaknesses, and the opportunities and threats that it encounters. The analysis helps focus on the agency's strengths, minimize threats, and take the greatest possible advantage of opportunities available. It is an on-going process that is monitored and updated by the EDD CEDS Committee. The following SWOT Analysis was comprised of information from economic development partners in the region over a one year period.

STRENGTHS

- Diversified regional economy
- Strong local economies in rural counties that strengthen region (i.e. Fredericksburg, New Braunfels, Kerrville, etc.) – micro-cluster economies
- Region is home to crossroads of IH-35, IH-10, and IH-37
- Strong military presence
- San Antonio Medical Center (SAMMC), home of military medicine
- Strong corporate headquarter presence (USAA, HEB, Rackspace, Whataburger, Valero, Tesoro, SWBC, Canadian General Tower, etc.)
- Port SA intermodal port and Hondo Airport are transportation and logistics assets
- Eagle Ford Shale oil and gas reserves (concentrated in rural AACOG region counties)
- Positioning of San Antonio as regional headquarters for Eagle Ford Shale production companies
- Growing local manufacturing cluster led by Toyota and Caterpillar plants and including Martin Marietta and Vulcan Materials
- Strong local healthcare cluster

SECTION III: SWOT

Strengths, Weaknesses, Opportunities, and Threats

STRENGTHS (CONTINUED)

- Growing Bioscience cluster, championed by BioMed SA
- Regional competency in biomedical research, including Southwest Research Institute and UT Health Science Center
- Availability of developable land (rural counties)
- Strong Collaboration / Communities, Economic Development Corporations (EDCs), Workforce Solutions, Education, etc.
- Post-Secondary Education Infrastructure (Alamo Colleges, UTSA, Texas A&M San Antonio, and numerous private universities)
- Public transportation capacity
- Emerging Cybersecurity industry leader

WEAKNESSES

- Low unemployment, limited talent pool for growth
- Low educational attainment levels relative to state and nation
- Eagle Ford Shale production has deleterious impact on local and county roadways
- Transportation access to support economy and workforce
- Highway capacity taxed in keeping up with economic and population growth
- Competing economic development interests regionally between municipalities and economic development groups
- Broadband and connectivity issues for rural residents
- Rural vs. Urban needs and capacity

SECTION III: SWOT

Strengths, Weaknesses, Opportunities, and Threats

OPPORTUNITIES

- Improved economic development coordination region-wide
- Leverage economic potential of San Antonio to Austin corridor
- Increase airport capacity region wide anchored by San Antonio International Airport and Stinson Airfield
- Increased economic coordination with Austin to build complementary industry clusters
- Continued development of competencies in emerging clusters, i.e. IT, manufacturing, and biosciences
- Enhance Business Retention and Expansion Initiatives with local partners
- Improve secondary/post-secondary collaboration to promote educational attainment and credentialing (i.e. dual credit, articulation, stackable credentials, etc.)
- Invest in Research & Development and venture capital assets in the region
- Strengthening of entrepreneurship assets (low barriers to global competition)
- Continue to build "Quality of Life" assets region-wide

THREATS

- Military reductions in force and reduction of additional federal funds
- Volatility in Oil and Gas Prices (supply and demand changes)
- Non-attainment designation of Air Quality Standards
- Competition with other regions for skilled workforce
- Resource constraints (public transit, air quality, water)

SECTION IV: PLAN OF ACTION

AACOG will continue to leverage resources and align interdependent planning and development components including economic development, workforce development, transportation, environmental-air quality, housing, and more. The Workforce Solutions Alamo Comprehensive Local Workforce Plan and AACOG's CEDS are aligned with the local workforce plan to meet employer needs, and to support initiatives identified as key drivers of future economic growth in the Alamo region. http://www.workforcesolutionsalamo.org/about-us/ workforce-development-board-plan

AACOG, as the regional economic development district and lead agency for implementation of the CEDS, will play several key roles to ensure support of the recommended Plan of Action to include:

1. Promote regionalism in economic development to ensure communities throughout the region are fully capitalizing on regional assets and building regional competencies.
2. Promote local economic development initiatives that leverage the unique assets of communities within the region.
3. Supply timely and actionable economic and labor market data to regional decision makers.
4. Provide technical assistance as needed to ensure communities within the Alamo region have knowledge of and access to the resources needed for their communities to prosper.
5. Promote collaboration and coordination among economic development stakeholders by facilitating relationships and bringing together key players with common interests.

The CEDS committee will meet quarterly to establish a framework to monitor/track activity towards these recommendations, including but not limited to establishing subgroups or taskforces for each of the five areas.

SECTION V: STRATEGIC RECOMMENDATIONS

As a result of the information shared by economic development stakeholders in the AACOG region and the SWOT Analysis, the following recommendations are outlined as strategic direction for the Economic Development District.

Recommendation 1: Work on improving the competitiveness of the region's key economic clusters.

Key Actions:

A. Assist the Alamo region's communities in implementing economic development strategies that attract and grow businesses in key economic clusters.

B. Assist smaller communities in developing smaller micro-clusters that capitalize on their unique community assets

C. Support initiatives that focus on growing industries that generate wealth for the region.

D. Provide economic development partners and municipalities learning opportunities and networking opportunities through a series of economic development workshops and trainings.

E. Provide assistance to regional municipalities and other economic development stakeholders in applying for funds from the Economic Development Administration and other Federal and State funding agencies.

SECTION V: STRATEGIC RECOMMENDATIONS

Recommendation 2: Monitor and assist in the educational attainment and training of the workforce, incentivizing businesses to locate and expand in the Alamo region.

Key Actions:

A. Coordinate with regional education and workforce development agencies to better align regional curricula to meet employer needs.

B. Support the region's human capital development by accessing resources for a well-prepared, skilled professional and technical workforce.

C. Secure and provide resources for an economic database of regional statistics, including labor pool, to attract businesses.

Recommendation 3: Through collaborative efforts, build a strong Innovation Infrastructure that promotes entrepreneurship and small business development.

Key Actions:

A. Support programs that develop entrepreneurial skills in the workforce.

B. Coordinate with regional Small Business Development Centers to improve access of resources throughout the region for entrepreneurs and small business owners.

C. Encourage incentive programs that will foster entrepreneurship and small business development

SECTION V: STRATEGIC RECOMMENDATIONS

Recommendation 4: Guide and assist in the development of the region's economic strength

Key Actions:

A. Assist the Alamo region's communities in implementing economic development strategies that capitalize on their unique characteristics and economic opportunity.

B. Identify unique industries that can be replicated throughout the region.

C. Coordinate marketing opportunities within the region to highlight each community's assets.

Recommendation 5: Coordinate and promote the economic resiliency within the AACOG region in conjunction with regional partners to minimize threats and hazards.

A. Identify persistent economic deficiencies and challenges.

B. Monitor economic indicators to mitigate impact of economic disasters and respond to potential economic shocks.

C. Assist distressed communities affected by economic collapse.

D. Identify capacity of income equality, economic diversification, regional affordability and business climate as capacity measures.

SECTION VI: PERFORMANCE MEASURES

AACOG and the CEDS Committee will use the following performance measures to evaluate performance and compliance with the 2018-2023 CEDS.

Competitiveness of Economic Clusters

1. Number of jobs created
2. Number of new business formations by industry cluster
3. Annual report of business investments in the region

Educational Attainment

1. Increase of overall educational attainment of population age 25+
2. Support network of education and business stakeholders
3. Foster apprenticeship programs that provide career pathways

SECTION VI: PERFORMANCE MEASURES

Support of Entrepreneurship and Small Business:

1. Create, develop and manage a business alliance for new or expanding businesses.
2. Support the need for improving infrastructure and capacity in the region.
3. Monitor number of jobs created by businesses with >5 employees.

Strategic Community Support:

1. Number of participants and workshops by the Economic Development District.
2. Number of requests for assistance completed by EDD.
3. Number of Economic Development presentations in the region.

Economic Resiliency:

1. Identify and leverage resources to respond to potential economic shocks.
2. Incorporate regional plans and strategies to aid and mitigate recovery.
3. Collaboration with federal, state and local partners to assist in recovery.

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Of Governments

ECONOMIC RESILIENCY

The goal of the AACOG region and its partners is to plan for a resilient region that will anticipate threats and economic risk, develops resources to reduce their impact, responds appropriately, and ultimately leads the region to recovery. This resilient approach extends beyond emergency responsiveness by utilizing available resources for planning and utilizing regional leadership to address vulnerabilities and to build and support vibrant, healthy communities.

The capacity to recover from an economic shock can be strengthened by addressing the following capacity measures:

1. **Economic Diversification:** Economic Diversification measures the degree to which economic activity is spread across sectors of an economy. When economic activity is concentrated in relatively few sectors, the overall regional economy is more vulnerable to problems in any of those sectors.
2. **Improved Business Climate** and improving access to jobs through affordable housing to include transportation choices. Strong support of entrepreneurship that will take advantage of new market trends and demographic needs; revitalizing downtowns and anchors for development.
3. **Regional Affordability/Housing:** Considering housing affordability including comparing the cost of housing to the level of income available to pay for that housing.
4. **Income Equality:** Income equality measures how evenly income is distributed across a population and considers how helping localities link assets throughout the region can improve equality.

Through innovation, adaptation, investing in local assets and connecting people, the AACOG region can enhance economic stability and competitiveness which will result in long-term success, viability and curability of the region's economy.

SEPARATE SECTIONS OF CEDS:
STRATEGIC RECOMMENDATIONS
Recommendation 5: Coordinate and promote the economic resiliency within the AACOG region in conjunction with regional partners to minimize threats and hazards.

A. Identify persistent economic deficiencies and challenges.
B. Monitor economic indicators to mitigate impact of economic disasters and respond to potential economic shocks.
C. Assist distressed communities affected by economic collapse.
D. Identify capacity of income equality, economic diversification, regional affordability and business climate as capacity measures.

PERFORMANCE MEASURES
Economic Resiliency:

1. Identify and leverage resources to respond to potential economic shocks.
2. Incorporate regional plans and strategies to aid and mitigate recovery.
3. Collaboration with federal, state and local partners to assist in recovery.

NEW/ADDITIONAL ECONOMIC RESILIENCY LANGUAGE:

Regional Business Recovery and Resiliency
In its role as a leader in promoting and enhancing community and regional resilience, AACOG will work with the private sector and its representatives to ensure that the business community has a disaster plan that includes the means by which businesses can recover and resume operations in a post-disaster environment. AACOG will strengthen relationships with the public and private sectors in each county so that it can better serve the areas. With the assistance of the emergency management teams and economic development groups in each area, AACOG will assist the business community respond to protect life, business environment, and property during and after disaster emergencies.

Planning and Preparation
During a disaster situation and recovery period, businesses may have to be self-sufficient until governmental assistance is available. In the interim, businesses need to be able to neutralize the situation to minimize the impact of disruption to the business operations. AACOG will work with local communities and their business sectors to identify resources that assist with planning the solutions, resources and options for disaster recovery for the businesses affected by natural or man-made disasters.

- **Planning – General Business Disaster Recovery Plan vs. Individual Business Disaster Recovery Plan**
    - Each county and/or community will need to decide whether to have a general business disaster recovery plan.
    - Each county and/or community will need to survey their business community/ies on whether they have their own disaster recovery plan.
    - The business disaster recovery plan should include:
        - Pre-disaster preparedness:
            - Prepare to lessen the impact of the disaster
            - Identify types of emergencies that may impact operations
            - Identify and understand situations which may escalate emergencies
            - Provide training to employees on how and what to do in case of a disaster
        - Post-disaster planning and implementation:
            - Ensure safety of employees
            - Ensure continuation, recovery or re-instatement of business operations

- **Development of Networks**
    - Each county and/or community will need to develop a communications network within the county, community, neighborhood, and business areas to use in pre-disaster preparedness and post-disaster planning and implementation.
    - Each county and/or community will need to designate a group or individual to maintain communications with businesses during and after the disaster.
    - Each county and/or community, with AACOG's assistance, will establish relationships and partnerships with state and federal agencies to assist with business recovery after a disaster.
    - Each county and/or community will need to follow the local emergency management plan.

APPENDIX A

OPPORTUNITY ZONES

One of the strengths of the AACOG Region is that it has a diversified regional economy. From oil and gas to manufacturing to tourism, the counties of the region have major and support industries that keep the area attractive for continued and added investment.

There are 33 Opportunity Zones (OZs) in the AACOG Region. Of those, 23 are located within Bexar County. The other ten (10) OZs are located in six (6) of the surrounding 12 counties: Atascosa, Comal, Karnes, Kerr, Medina and Wilson.

Opportunity Zones (OZs) Background Information:
OZs were created under the 2017 Tax Cuts and Jobs Act. They are a federal tool designed to spur economic development and job creation in distressed communities throughout the U.S. OZs are designated low-income census tracts where tax incentives are available to groups or individuals who invest in an Opportunity Fund, and hold their capital gains in OZ-related assets or property. By investing in Opportunity Zones, investors stand to gain a temporary deferral on their capital gains taxes if they hold their investments for at least five (5) years.

AACOG CEDS and Opportunity Zones:
AACOG will work with the counties and communities, especially the rural areas, where OZs are located to develop and promote the attractiveness of the OZs as key investment-ready locations within the Alamo Region.

Opportunity Zones by County:
Atascosa County, located in the southern part of the AACOG Region, has two (2) OZs (refer to map for OZs 29 and 30). OZ 29 is located inside the northern boundary of the county, west of U.S. Highway 281, and just south of Bexar County OZ 27, and includes the city of Leming. OZ 30 is located in the north central part of the county, along State Highway 16, and includes the city of Poteet.

OZ 30 is Tract 9603.00 and is 9.0 square miles in area. The population is 3,646, with the majority (2,412 or 66.2%) being between the ages of 18 and 64, and approximately 19% or 69. being persons under the age of 18. OZ 30's per capita income is $19,151, and the poverty rate is 20.8%.

Source: U.S. Census Bureau: American Community Survey, Stats America

The largest portion of OZ 30's industry mix is Natural Resources, Mining and Construction with an employment distribution of 27.1%. The second largest portion is Trade, Transportation and Utilities with 21.8% employment distribution. The remainder of the employment distributions range from a low of 0.5% for Arts and Entertainment to 9.6% for Educational Services.

Source: IBRC at the Indiana University Kelley School of Business, Stats America

OZ 29 is Tract 9604.01 and is 20.0 square miles in area. The population is 2,331, with the majority (1,278 or 54.8%) being between the ages of 18 and 64, and approximately 30.8% or 719 being persons under the age of 18. OZ 29's per capita income is $18,358, and the poverty rate is 11.4%.

Source: U.S. Census Bureau: American Community Survey, Stats America

The largest portion of OZ 29's industry mix is Natural Resources, Mining and Construction with an employment distribution of 27.1%. The second largest portion is Trade, Transportation and Utilities with 21.8% employment distribution. The remainder of the employment distributions range from a low of 0.5% for Arts and Entertainment to 9.6% for Educational Services.

Source: IBRC at the Indiana University Kelley School of Business, Stats America

Comal County, located in the northern part of the AACOG Region, has one (1) OZ (refer to map for OZ 33). The location of OZ 33 is in the north central to northwest portion of Comal County, north of State Highway 46 and east of U.S. Highway 281.

OZ 33 is Tract 3106.08 and is 26.0 square miles in area. The population is 3,792, with the majority (2,228 or 58.8%) being between the ages of 18 and 64, and approximately 25.4% or 965 being persons under the age of 18. OZ 33's per capita income is $26,118, and the poverty rate is 20.6%.

Source: U.S. Census Bureau: American Community Survey, Stats America

The largest portion of OZ 33's industry mix is Trade, Transportation and Utilities with an employment distribution of 23.1%. The second largest portion is Accommodation and Food Service with 13.6% employment distribution. The remainder of the employment distributions range from a low of 4.2% for Professional, Scientific and Technical to 12.0% for Natural Resources, Mining and Construction.

Source: IBRC at the Indiana University Kelley School of Business, Stats America

Karnes County, located in the southeast portion of the AACOG Region, has two (2) OZs (refer to map for OZs 3 and 4). OZ 3 is located in the southeast part of the county, just inside the county line. This OZ includes the city of Kenedy; and surrounds each side of State Highways 72 and 239, and U.S. Highway 181. OZ 4 is to the west of OZ 3 and includes the city of Karnes City. The OZ surrounds both sides of State Highways 123 and 80, and U.S. Highway 181.

OZ 4 is Tract 9702.00 and is 141.0 square miles in area. The population is 4,138, with the majority (2,459 or 59.4%) being between the ages of 18 and 64, and approximately 25.7% or 1,063 being persons under the age of 18. OZ 4's per capita income is $27,079, and the poverty rate is 24.1%.

Source: U.S. Census Bureau: American Community Survey, Stats America

The largest portion of OZ 4's industry mix is Natural Resources, Mining and Construction with an employment distribution of 23.2%. The second largest portion is Trade, Transportation and Utilities with 16.2% employment distribution. The remainder of the employment distributions range from a low of 0.1% for Arts and Entertainment to 14.9% for Educational Services.

Source: IBRC at the Indiana University Kelley School of Business, Stats America

OZ 3 is Tract 9703.00 and is 186.0 square miles in area. The population is 7,209, with the majority (5,214 or 72.3%) being between the ages of 18 and 64, and approximately 17.6% or 1,266 being persons under the age of 18. OZ 3's per capita income is $18,434, and the poverty rate is 20.5%.

Source: U.S. Census Bureau: American Community Survey, Stats America

The largest portion of OZ 3's industry mix is Natural Resources, Mining and Construction with an employment distribution of 23.2%. The second largest portion is Trade, Transportation and Utilities with 16.2% employment distribution. The remainder of the employment distributions range from a low of 0.1% for Arts and Entertainment to 14.9% for Educational Services.

Source: IBRC at the Indiana University Kelley School of Business, Stats America

Kerr County, located in the north to northwest of the AACOG Region, has two (2) OZs (refer to map for OZs 31 and 32). Oz 31 includes the city of Kerrville, southwest of Interstate Highway 10, east of State Highway 16, and south of State Highway 39. OZ 32 is located in the southeast part of the county and includes city of Center Point. The OZ is southwest of Interstate Highway 10, east of State Highway 173, and surrounds State Highway 27.

OZ 32 is Tract 9608.00 and is 129.0 square miles in area. The population is 4,146, with the majority (2,403 or 58.0%) being between the ages of 18 and 64, and approximately 21.9% or 906 being persons age 65 and over. OZ 32's per capita income is $41,426, and the poverty rate is 16.7%.

Source: U.S. Census Bureau: American Community Survey, Stats America

The largest portion of OZ 32's industry mix is Trade, Transportation and Utilities with an employment distribution of 17.8%. The second largest portion is Health Care and Social Services with 16.7% employment distribution. The remainder of the employment distributions range from a low of 1.4% for Arts and Entertainment to 10.8% for Educational Services.

Source: IBRC at the Indiana University Kelley School of Business, Stats America

Features of Kerr County OZ 32:

Major Projects**:**

- Recent wastewater infrastructure improvement, Center Point tied into Kerrville City Wastewater system
- Precinct is in the process of lifting prohibition of alcohol sales which will stimulate growth across many sectors in this region: final vote is on the November Ballot

Major Employers:

- Martin Marietta
- J3Construction
- Frontier Gear

Adjacent to:

- Kerrville Municipal Airport

- Kerrville Airport Commerce, Home to recently announced Tier 1 Aviation and Aerospace Supplier-Killdeer Mountain Manufacturing
- James Avery Artisan Jewelry Craftsman Center
- Fox Tank
- Mooney International

OZ 31 is Tract 9605.00 and is 4.0 square miles in area. The population is 5,106, with the majority (2,794 or 54.7%) being between the ages of 18 and 64, and approximately 24.4% or 1,247 being persons age 65 and over. OZ 31's per capita income is $27,125, and the poverty rate is 16.7%.

Source: U.S. Census Bureau: American Community Survey, Stats America

The largest portion of OZ 31's industry mix is Trade, Transportation and Utilities with an employment distribution of 17.8%. The second largest portion is Health Care and Social Services with 16.7% employment distribution. The remainder of the employment distributions range from a low of 1.4% for Arts and Entertainment to 10.8% for Educational Services.

Source: IBRC at the Indiana University Kelley School of Business, Stats America

Features of Kerr County OZ 31:

Kerrville Sports Complex**:** The Kerrville Sports Complex offers top level, high quality athletic fields suitable for year-round play and tournaments. Sports facilitated on site include:

- Baseball (4 little league baseball and 2 adult baseball fields)
- Softball (3 girls softball and 2 adult softball fields)
- Soccer (20 acres of field space; soccer fields are by reservation only)

D-BAT Facilities: The City of Kerrville teamed up with D-BAT Baseball to offer the area an indoor hitting facility for both softball and baseball, complete with a full pro shop and coaching clinics / camps. Numerous baseball and softball tournaments at the local, state, regional, and national levels are held at the fields.

Planned Development Area: Surrounding the Multi-Sports Complex Town Creek at Holdsworth with over 240 acres, and adjacent to Interstate 10; mixed use development. Area planned for hotels, retail restaurants, commercial, live/work, multi-family, town homes, patio/garden homes, walking/biking trail, and parks all between town creek and Interstate 10.

Historic Downtown District & TIRZ District: Primary route of the Kerrville Urban Trail System - KUTS is a non-profit organization that promotes walkability and community vibrancy, and cohesion among businesses and people through a system of independent walking/biking trails in districts throughout Kerrville.

Major Employers and Projects:
- All-Plastics – Plastic injection molding for medical and beverage companies
- HEB Expansion

- Breweries/Tap Rooms/Wine:
  - Pint & Plow
  - Basement Brewers

Medina County, located in the western portion of the AACOG Region has two (2) OZs (refer to map for OZs 1 and 2). OZ 1 is located in the south to southeast portion of the county; and south of U.S. Highway 90, northeast of State Highway 173, and north of U.S. Highway 57. OZ 2 is located in the central to southern portion of the county; and south of U.S. Highway 90, west and east of State Highway 173. It includes portions of Hondo, Biry and Yancy.

OZ 1 is Tract 0004.02 and is 76.0 square miles in area. The population is 4,002, with the majority (2,475 or 61.8%) being between the ages of 18 and 64, and approximately 24.4% or 978 being persons age 65 and over. OZ 1's per capita income is $30,067, and the poverty rate is 13.8%.

Source: U.S. Census Bureau: American Community Survey, Stats America

The largest portion of OZ 1's industry mix is Trade, Transportation and Utilities with an employment distribution of 22.0%. The second largest portion is Educational Services with 17.9% employment distribution. The remainder of the employment distributions range from a low of 2.2% for Arts and Entertainment to 9.9% for Accommodation and Food Services.

Source: IBRC at the Indiana University Kelley School of Business, Stats America

OZ 2 is Tract 0005.00 and is 176.0 square miles in area. The population is 5,438, with the majority (3,150 or 57.9%) being between the ages of 18 and 64, and approximately 27.4% or 1,488 being persons under the age of 18. OZ 2's per capita income is $25,748, and the poverty rate is 8.8%.

Source: U.S. Census Bureau: American Community Survey, Stats America

The largest portion of OZ 2's industry mix is Trade, Transportation and Utilities with an employment distribution of 22.0%. The second largest portion is Educational Services with 17.9% employment distribution. The remainder of the employment distributions range from a low of 2.2% for Arts and Entertainment to 9.9% for Accommodation and Food Services.

Source: IBRC at the Indiana University Kelley School of Business, Stats America

Wilson County, located is the eastern to south eastern portion of the AACOG Region has one (1) OZ (refer to map for OZ 34). The location of OZ 34 is inside the western portion of the county, southeast of U.S. Highway 181.

OZ 34 is Tract 0002.01 and is 40.0 square miles in area. The population is 2,486, with the majority (1,499 or 60.3%) being between the ages of 18 and 64, and approximately 23.1% or 574 being persons under the age of 18. OZ 34's per capita income is $26,270, and the poverty rate is 18.2%.

Source: U.S. Census Bureau: American Community Survey, Stats America

The largest portion of OZ 34's industry mix is Trade, Transportation and Utilities with an employment distribution of 21.8%. The second largest portion is Natural Resources, Mining and Construction with

16.8% employment distribution. The remainder of the employment distributions range from a low of 0.9% for Arts and Entertainment to 16.4% for Educational Services.

Source: IBRC at the Indiana University Kelley School of Business, Stats America
Throughout the AACOG Region and within the Opportunity Zones, the counties and the communities have various stakeholders interested in retaining and creating jobs. AACOG will assist the counties and communities develop new and existing partnerships to ensure that economic development continues. The strong collaboration within the counties will aid in future development of the region.

Within the AACOG CEDS, there are two (2) recommendations which directly refer to the development of regional economic clusters and assisting in the development of the region's economic strength. These recommendations and the supporting actions provide the support for Opportunity Zones.

Features of Wilson County OZ 34:

<u>Small Business</u>**:** There are a few small businesses located in the zone. Businesses include:

- Las Lagunas Restaurant
- Aurelia's Restaurant
- Bradly's Convenience Store
- Auto Repair Shop

<u>San Antonio River Authority (SARA)</u>: SARA has a designated paddling trail along the San Antonio River. Entry and exit points are located within the zone. In addition, SARA owns and operates the Helton Nature park along the river in this zone.

<u>Development</u>: Historically there has been little development in this zone. Recently a new 33 home dense lot development has been started. Low development in this area can partially be attributed to the large flood zone area along the San Antonio River and other low-lying areas that have a tendency to flood. In addition, most of this zone is used for agricultural production.

<u>Cities</u>: There are currently no incorporated cities within the zone.

<u>Major Employers</u>: There are no major employers within the zone.

CEDS Recommendation 1: Work on improving the competitiveness of the region's key economic clusters.

Tie Key Actions to activities within OZs.

CEDS Recommendation 4: Guide and assist in the development of the region's economic strength.

Tie Key Actions to activities within OZs.

<u>Review and Update of Opportunity Zones and CEDS</u>:
On a quarterly basis, AACOG staff and the CEDS Committee will review the progress of the Opportunity Zones.