

# The Growth at Fort Bliss

Population Change, Economic Impacts, and Demand for Multifamily Housing



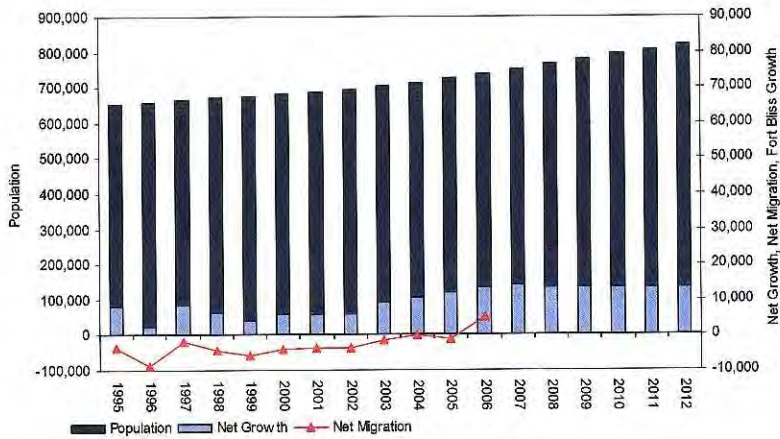
## Fort Bliss Growth 2006-2012

|                      | Baseline 2005 |            | 2006  | 2007  | 2008  | 2009  | 2010  | 2011  | 2012  | Endstate 2012 |
|----------------------|---------------|------------|-------|-------|-------|-------|-------|-------|-------|---------------|
| Soldiers             | 9330          | +/-        | 3844  | 948   | 2778  | 2764  | 7386  | 5901  | 4333  | 27954         |
|                      |               | Cumulative | 13174 | 14122 | 16900 | 19664 | 27050 | 32951 | 37284 | 37284         |
| Spouses              | 4945          | +/-        | 2230  | 550   | 1611  | 1603  | 4284  | 3423  | 2513  | 16213         |
|                      |               | Cumulative | 7175  | 7724  | 9336  | 10939 | 15223 | 18645 | 21158 | 21158         |
| Children             | 10385         | +/-        | 2952  | 728   | 2134  | 2123  | 5672  | 4532  | 3328  | 21469         |
|                      |               | Cumulative | 13337 | 14065 | 16199 | 18322 | 23994 | 28526 | 31854 | 31854         |
| 6-12 years<br>(34%)  | 3531          | +/-        | 1004  | 248   | 725   | 722   | 1929  | 1541  | 1131  | 7299          |
|                      |               | Cumulative | 4535  | 4782  | 5508  | 6229  | 8158  | 9699  | 10830 | 10830         |
| 13-18 years<br>(29%) | 3012          | +/-        | 856   | 211   | 619   | 616   | 1645  | 1314  | 965   | 6226          |
|                      |               | Cumulative | 3868  | 4079  | 4698  | 5314  | 6959  | 8273  | 9238  | 9238          |
| Total School Age     | 6543          | +/-        | 1860  | 459   | 1344  | 1337  | 3574  | 2855  | 2096  | 13525         |
|                      |               | Cumulative | 8403  | 8862  | 10206 | 11543 | 15117 | 17972 | 20068 | 20068         |

FMWRC/MCEC Model:  
 Spouses = # of Soldiers \* .58  
 Children = (# of Soldiers \* .48) \* (1.6 Kids)  
 School-age = # of children \* .63



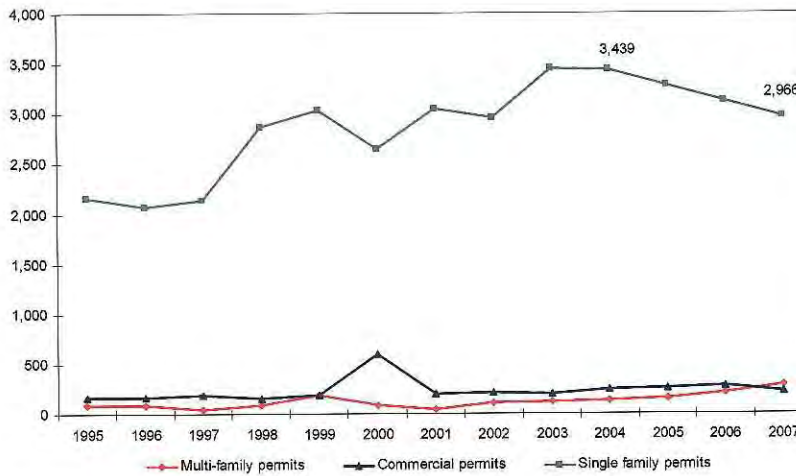
# Growth Trends in El Paso



Sources: US Census Bureau mid year estimates (BEA) and forecast values from the Border Region Modeling Project, Fort Bliss Transformation Office.



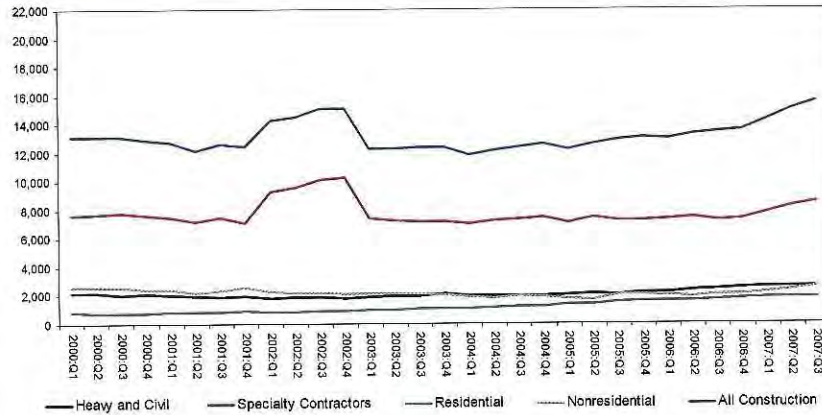
# Greater El Paso Construction: Services and Materials, Permits



Source: City of El Paso, Development Services



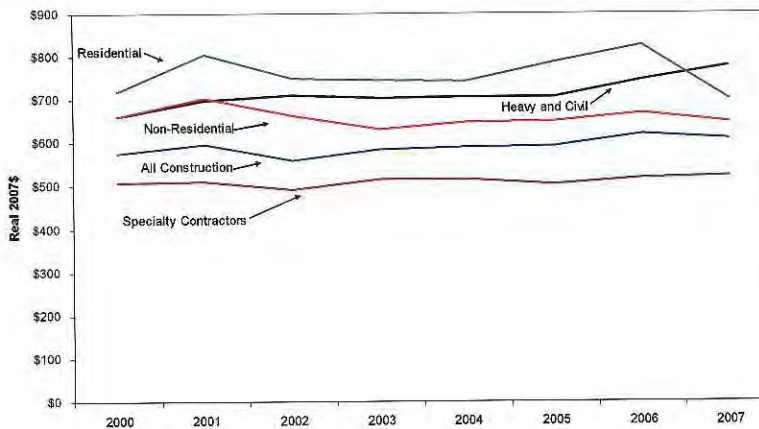
# Construction Employment



Source: Texas Workforce Commission/ Bureau of Labor Statistics, QCEW



# Construction Industry Weekly Wages in El Paso



Source: Texas Workforce Commission/ Bureau of Labor Statistics, QCEW



## Beyond Economic Impact

| Impact Type         | 7,000 Troops         | 27,954 Troops          |
|---------------------|----------------------|------------------------|
| <b>Value Added:</b> |                      |                        |
| Direct:             | 632,186,816          | 2,529,289,138          |
| Indirect:           | 0                    | 0                      |
| Induced:            | 212,620,552          | 849,084,987            |
| <b>Total:</b>       | <b>\$844,807,368</b> | <b>\$3,373,677,881</b> |
| <b>Employment:</b>  |                      |                        |
| Direct:             | 7,000                | 27,954                 |
| Indirect:           | 0                    | 2,795,428,006          |
| Induced:            | 3,906.50             | 15,600                 |
| <b>Total:</b>       | <b>10,906.50</b>     | <b>43,554</b>          |
| <b>Output:</b>      |                      |                        |
| Direct:             | 632,186,816          | 2,524,592,893          |
| Indirect:           | 0                    | 0                      |
| Induced:            | 361,383,051          | 1,443,157,401          |
| <b>Total:</b>       | <b>\$993,569,867</b> | <b>\$3,967,750,295</b> |

Source: Minnesota IMPLAN Group (MIG), IMPLAN. All values 2005\$



## Top Impacted Industries

| Rank | Industry  | Rank | Industry   |
|------|---|------|--|
| 1    | Food services and drinking places                         | 28   | Legal services                                       |
| 2    | Wholesale trade   | 29   | Other educational services                           |
| 3    | Offices of physicians- dentists- and other health         | 30   | Other ambulatory health care services                |
| 4    | Real estate   | 31   | Other amusement- gambling- and recreation industries |
| 5    | Social assistance- except child day care services         | 32   | Personal care services                               |
| 6    | General merchandise stores                                | 33   | Furniture and home furnishings stores                |
| 7    | Food and beverage stores                                  | 34   | Electronics and appliance stores                     |
| 8    | Hospitals   | 35   | Telecommunications                                   |
| 9    | Automotive repair and maintenance                         | 36   | Business support services                            |
| 10   | Motor vehicle and parts dealers                           | 37   | Services to buildings and dwellings                  |
| 11   | Clothing and clothing accessories stores                  | 38   | Hotels and motels- including casino hotels           |
| 12   | Home health care services                                 | 39   | Other State and local government enterprises         |
| 13   | Nursing and residential care facilities                   | 40   | Postal service                                       |
| 14   | Child day care services                                   | 41   | Nondepository credit intermediation                  |
| 15   | Miscellaneous store retailers                             | 42   | Insurance agencies- brokerages- and related          |
| 16   | Nonstore retailers  | 43   | Accounting and bookkeeping services                  |
| 17   | Employment services                                       | 44   | Investigation and security services                  |
| 18   | Civic- social- professional and similar organizations     | 45   | Fitness and recreational sports centers              |
| 19   | Monetary authorities and depository credit intermediaries | 46   | Drycleaning and laundry services                     |
| 20   | Cut and sew apparel manufacturing                         | 47   | Power generation and supply                          |
| 21   | Building material and garden supply stores                | 48   | Footwear manufacturing                               |
| 22   | Health and personal care stores                           | 49   | Transit and ground passenger transportation          |
| 23   | Gasoline stations   | 50   | Motion picture and video industries                  |
| 24   | Truck transportation                                      | 51   | Automotive equipment rental and leasing              |
| 25   | Sporting goods- hobby- book and music stores              | 52   | Elementary and secondary schools                     |
| 26   | Insurance carriers  | 53   | Car washes   |
| 27   | Grantmaking and giving and social advocacy organizations  | 54   | Other personal services                              |

Source: Minnesota IMPLAN Group (MIG), IMPLAN



|   |        |        |        |        |        |        |        |        |        |
|---|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| <b>Demographics for Housing</b>               |        |        |        |        |        |        |        |        |        |
| <b>Married</b>                                |        |        |        |        |        |        |        |        |        |
| Single E-6 enlisted, Single officer           | 10,769 | 12,306 | 16,329 | 18,781 | 20,212 | 20,212 | 20,212 | 20,212 | 20,212 |
| Total Housing Requirement (excludes barracks) | 1,099  | 1,217  | 1,624  | 1,845  | 1,976  | 1,976  | 1,976  | 1,976  | 1,976  |
|   | 11,868 | 13,523 | 17,953 | 20,626 | 22,188 | 22,188 | 22,188 | 22,188 | 22,188 |

|                                 |       |        |        |        |        |        |        |        |        |
|---------------------------------|-------|--------|--------|--------|--------|--------|--------|--------|--------|
| <b>Community Housing Demand</b> |       |        |        |        |        |        |        |        |        |
| Military Family Homeowners      | 8,692 | 10,083 | 14,213 | 16,640 | 17,932 | 17,932 | 17,932 | 17,932 | 17,932 |
| Military Family Renters         | 3,394 | 3,650  | 4,388  | 4,834  | 5,026  | 5,026  | 5,026  | 5,026  | 4,880  |
| Single Homeowners E-6 and above | 4,199 | 5,216  | 8,201  | 9,961  | 10,930 | 10,930 | 10,930 | 10,930 | 11,076 |
| Single Renters E-6 and above    | 289   | 327    | 397    | 440    | 465    | 465    | 465    | 465    | 462    |
|                                 | 810   | 890    | 1,227  | 1,405  | 1,511  | 1,511  | 1,511  | 1,511  | 1,514  |

|                                     |       |       |       |       |       |       |       |       |       |
|-------------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| <b>Army Controlled Assets</b>       |       |       |       |       |       |       |       |       |       |
| Privatized on-post (Family Housing) | 3,176 | 3,440 | 3,740 | 3,986 | 4,256 | 4,256 | 4,256 | 4,256 | 4,256 |

|                                    |       |       |       |       |       |       |       |       |       |
|------------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| <b>Community Housing Shortfall</b> |       |       |       |       |       |       |       |       |       |
| Shortfall for Married Soldiers     | 1,823 | 1,498 | 2,582 | 2,876 | 3,626 | 3,626 | 3,626 | 2,690 | 2,690 |
| Shortfall for Single Soldiers      | 306   | 253   | 389   | 438   | 486   | 486   | 486   | 449   | 449   |
|                                    | 2,129 | 1,751 | 2,971 | 3,314 | 4,092 | 4,092 | 4,092 | 3,139 | 3,139 |

|  |            |          |          |          |          |          |          |          |              |
|--|------------|----------|----------|----------|----------|----------|----------|----------|--------------|
| <b>Shortfall for Married Soldiers</b>                              |            |          |          |          |          |          |          |          |              |
| Families not accompanying during deployments (30% married/Bde)     | 1,823      | 1,498    | 2,582    | 2,876    | 3,626    | 3,626    | 3,626    | 2,690    | 2,690        |
| Section 801-leased   | -577       | -577     | -577     | -577     | -577     | -577     | -577     | -577     | -577         |
| Domestic Lease (local community)                                   | -300       | -300     | -300     | -150     | 0        | 0        | 0        | 0        | 0            |
| Additional Domestic Leases   | -250       | -250     | -250     | -250     | -250     | -250     | -250     | -250     | -250         |
| Add'l assets from Industry Forum (FY09) targeted toward Developers | 0          | -371     | -855     | -399     | -299     | -299     | -299     | -2500    | -2500        |
|  | 0          | 0        | -600     | -1500    | -2500    | -2500    | -2500    | -2500    | -2500        |
| <b>Married Soldier Deficit/Surplus</b>                             | <b>696</b> | <b>-</b> | <b>-</b> | <b>-</b> | <b>-</b> | <b>-</b> | <b>-</b> | <b>-</b> | <b>(937)</b> |

|  |            |            |             |            |             |             |             |            |            |
|--|------------|------------|-------------|------------|-------------|-------------|-------------|------------|------------|
| <b>Shortfall for Single E-6 Enlisted, Single Officer</b>           |            |            |             |            |             |             |             |            |            |
| Privatized on-post (Senior Single UPH and Officer)                 | 306        | 253        | 389         | 438        | 466         | 466         | 466         | 449        | 449        |
| Add'l assets from Industry Forum (FY09) targeted toward Developers | -          | -          | -260        | -358       | -358        | -358        | -358        | -358       | -358       |
| <b>Single Soldier Deficit/Surplus</b>                              | <b>306</b> | <b>253</b> | <b>-129</b> | <b>-80</b> | <b>-108</b> | <b>-108</b> | <b>-108</b> | <b>-91</b> | <b>-91</b> |

2008 Pay and 2009 BAH - Fort Bliss and El Paso, TX

|       | BAH W/Dep | BAH WO  | 08/09 Comp |        |
|-------|-----------|---------|------------|--------|
|       |           |         | W/Dep      | WO Dep |
| O10   |           |         |            |        |
| O9    |           |         |            |        |
| O8    |           |         |            |        |
| O7    | 1569.00   | 1259.00 | 230.00     | 30.00  |
| O6    | 1551.00   | 1234.00 | 227.00     | 27.00  |
| O5    | 1538.00   | 1154.00 | 225.00     | 66.00  |
| O4    | 1412.00   | 1102.00 | 185.00     | 27.00  |
| O3    | 1230.00   | 980.00  | 124.00     | -10.00 |
| O2    | 1013.00   | 908.00  | -37.00     | 57.00  |
| O1    | 928.00    | 866.00  | 32.00      | 134.00 |
| O3E   | 1313.00   | 1015.00 | 152.00     | -39.00 |
| O2E   | 1218.00   | 960.00  | 115.00     | 6.00   |
| O1E   | 1111.00   | 917.00  | 34.00      | 41.00  |
| W5    | 1379.00   | 1113.00 | 174.00     | 35.00  |
| W4    | 1301.00   | 1035.00 | 148.00     | -24.00 |
| W3    | 1234.00   | 970.00  | 127.00     | -2.00  |
| W2    | 1129.00   | 936.00  | 47.00      | 26.00  |
| W1    | 1017.00   | 882.00  | -37.00     | 90.00  |
| E9    | 1283.00   | 967.00  | 143.00     | 1.00   |
| E8    | 1180.00   | 936.00  | 86.00      | 25.00  |
| E7    | 1094.00   | 893.00  | 21.00      | 84.00  |
| E6    | 1015.00   | 970.00  | -39.00     | 179.00 |
| E5    | 917.00    | 807.00  | 41.00      | 106.00 |
| E4    | 892.00    | 686.00  | 88.00      | 50.00  |
| E3    | 892.00    | 686.00  | 88.00      | 50.00  |
| E2    | 892.00    | 686.00  | 88.00      | 50.00  |
| E1    | 892.00    | 686.00  | 88.00      | 50.00  |
| BAS O |           |         |            |        |
| BAS E |           |         |            |        |