Permian Basin Regional Planning Commission (PBRPC) Comprehensive Economic Development Strategy (CEDS)

2021-2025

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ACKNOWLEDGEMENTS

The Strategy Committee is the entity identified by the Permian Basin Regional Planning Commission (PBRPC) with the responsibility for developing, revising, or replacing the CEDS. The Permian Basin Economic Development District, Strategy Committee is composed of the PBRPC Economic Development Board of Directors and is advised by regional stakeholders representing a diverse range of interests. More than 50% of Committee membership are engaged in private industry, either by business ownership or employment, in addition to their elected public office and local community volunteer role.

Members include:

- Andrews County, Mayor Flora Braly
- Andrews County, Judge Charlie Falcon
- Borden County, Judge Ross Sharp
- Crane County, Judge Roy Hodges
- Dawson County, Judge Foy O'Brien
- Ector County, Judge Debi Hays
- Ector County, Council member Denise Swanner
- Ector County, Joe Hurt
- Gaines County, Mayor Charles Evans
- Gaines County, Judge Tom Keyes
- Glasscock County, Judge Kim Halfmann
- Howard County, Judge Kathryn Wiseman
- Loving County, Judge Skeet Jones
- Martin County, Judge Bryan Cox
- Midland County, Judge Terry Johnson
- Midland County, Mayor Patrick Payton
- Pecos County, Judge Joe Shuster
- Pecos County, Mayor Chris Alexander
- Reeves County, Judge Leo M. Hung
- Terrell County, Judge Dale Carruthers
- Upton County, Judge Dusty Kilgore
- Ward County, Judge Greg Holly
- Winkler County, Judge Charles Wolf
- Senator, District 31 Honorable Kel Seliger
- Representative, District 81 Honorable Brooks Landgraf
- Representative, District 82 Honorable Tom Craddick
- Representative, District 83 Honorable Dustin Burrows

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- Debi Hays, Ector County Judge
- Mike Gardner, County Commissioner, Ector county
- Jay Holt, Operations Chief, Big Spring Fire Department
- Steve Eggleston, City Manager, City of Andrews
- Debra, City Council, City of Seagraves
- Darren Brown, Mayor, City of Iraan
- Mark Willis, Executive Director, Big Spring EDC
- Rex Thee, City Manager, City of Monahans
- Steve Thompson, Odessa City Council District #2
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- Alma Montes, Area Agency on Aging
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- Chris Cowen, Engineer, TxDOT
- Arturo Carrasco, Execution Coordinator Advisor, Chevron USA INC.
- Miranda Rice, Program Specialist, PBRPC

ECONOMIC DEVELOPMENT PARTNERS

Big Spring Economic Development Corporation
Permian Basin Center for Energy and Economic Diversification (UTPB)
Permian Strategic Partnership
Permian Basin Metropolitan Planning Organization
Grow Odessa
Lamesa Economic Development Corporation
Fort Stockton Economic Development Corporation
Midland Economic Development Corporation
Midland Convention and Visitors Center Bureau
Midland Video Tourbook
MOTOR MPO
Odessa Economic Development Corporation
Pecos Economic Development Corporation
Seminole Economic Development Corporation
MOTRAN, Midland Odessa Transportation Alliance
Tall City Tomorrow (City of Midland)
TX DOT Odessa District
Workforce Solutions Permian Basin
Ports to Plains Alliance
Midland International Air and Space Port
McCamey Economic Development Corporation
Iraan Economic Development Corporation
Andrews Economic Development Corporation
Gail
Borden County
Garden City
Glasscock County

Andrews County Chamber of Commerce
Big Spring Area Chamber of Commerce
Crane County Chamber of Commerce
Fort Stockton Chamber of Commerce
Iraan-Sheffield Chamber of Commerce
Lamesa Chamber of Commerce
Martin County Chamber of Commerce
McCamey Chamber of Commerce
Midland Chamber of Commerce
Midland Hispanic Chamber of Commerce
Monahans Chamber of Commerce
Odessa Chamber of Commerce
Pecos Area Chamber of Commerce
Sanderson Chamber of Commerce
Seminole Chamber of Commerce
City of Andrews
City of Crane
City of Fort Stockton
City of Kermit
City of McCamey
City of Mentone
City of Midland
City of Monahans
City of Odessa
City of Pecos
City of Sanderson
City of Stanton

INTRODUCTION AND PURPOSE

VISION Statement: Permian Basin is a region enjoying economic growth and prosperity through industry diversification, strategic planning and collaborative regional partnerships.

The Comprehensive Economic Development Strategy (CEDS) serves as a roadmap that aggregates and synthesizes economic development initiatives throughout the 17-county Permian Basin region and clarifies how the regional economy is likely to diversify and strengthen over a five-year period (2020-2025). 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 Permian Regional Planning Commission (PBRPC) CEDS was developed through a locally-based, regionally-driven economic development planning process. PBRPC'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, PBRPC inventoried and reviewed existing economic development plans, reports, initiatives and strategies underway in the region. Collaborations and economic development initiatives were incorporated into the CEDS to create a collective regional strategy-driven plan.

PBRPC also engaged the CEDS Committee and community partners to contribute and validate the analysis, goals and benchmarks assessed in the CEDS. At its December 2021 Meeting, the CEDS Committee reviewed in detail the data collected in preparation of the PBRPC CEDs. At the meeting the Committee was also provided a summary of regional economical development plans from partner agencies and economic development organizations from communities throughout the Permian Basin, many of which Committee members represent. Committee members then participated in a strategic work session, conducting a SWOT analysis and developing a Plan of Action with Strategic Recommendations. The Committee provided additional feedback via individual interviews, surveys, and regional videoconference planning sessions in November and December 2021. Community comment period for the CEDS was from November 30, 2021 through December 31, 2021.

EXECUTIVE SUMMARY

In March 2020, local and State of Texas orders were issued for all persons to stay in their homes except for persons determined essential workers. Since those orders were issued, regional economies have experienced varying levels of economic activity as businesses open and close in response to community spread, and many businesses are permanently shuttered due to lack of demand for goods and services at previous levels.

While the Texas economy is showing evidence of recovering, recent surges in infections, hospitalizations, and mortality continue to demand, caution and thoughtfulness in economic development plans and initiatives. What will be significant to the Permian Basin 17-county area in the coming years is the unknown continued effect of the Coronavirus (COVID-19) public health crisis.

The 17-county Permian Basin is economically unique compared to peer regions. The heavy concentration of Oil and Gas deposits has attracted investment and spurred more than a century of sustained exploration and production activity that dwarfs that of most regions, even those considered to be primarily energy economies. Throughout its history, the region has reaped significant economic benefits from its natural resources, developing a robust and mature export-oriented energy cluster that has generated both tremendous individual wealth and significant Gross Regional Product (GRP).

The Oil and Gas Industry is subject to a range of external pressures including, not only the pandemic, but also foreign production and demand, economic cycles, regulatory policy, tariffs, weather, etc. The resultant volatility has led to a history of boom-bust cycles of economic activity for the region that is challenging at both its highs and lows - taxing capacity on the high side and challenging maintenance on the low. Fierce competition for experienced labor to supply workforce demands during booms has resulted in significant wage pressures and high labor costs that impacts all industries. The recent loss in 2021 of 18,454 jobs in Natural Resources and Mining and overall loss of 41,432 jobs will have a significant economic impact in the Permian Basin region.

Stakeholders in a 2021 TXDOT I-20 Corridor Study by TXDOT noted several challenges for the Permian Basin region including poor pavement condition, frontage road flooding events, and unsafe ramps. Issues have the potential to be compounded in the coming years as TXDOT projections indicated increased volumes the West segment, especially in the Midland area, through 2050 with 40% to 60% being truck traffic along the West segment.[1]

EXECUTIVE SUMMARY

The MOTOR MPO cited challenges in public transportation in their South Midland Mobility study noting “the area currently has little to no accommodations for alternative modes of transportation” and “low density and rural atmosphere” limits choices as alternative modes of transportation (I.e., bicycle paths, pedestrian paths, etc.).

The Permian Basin's education and workforce development system is strong. The region's Workforce Development Board maintains strong, collaborative partnerships with secondary and post-secondary school systems. These partnerships allow for the preparation of an emerging workforce ready for career opportunities and pathways supported by local industry. However, the region's workforce, is low-skilled, with overall higher educational and certification attainment rates lower than the state. While the region's education and workforce infrastructure is substantial, continued efforts are needed to ensure the workforce, particularly youth, are acquiring the certifications, skills and credentials needed to compete in today's and tomorrow's economy.

The pandemic has caused the workforce to transition to essential, virtual and digital remote home office workers and forced educational institutions to provide training on-line resulting in a need for a workforce with strong computer literacy skills. The effect of the COVID-19 pandemic has reshaped and will continue to re-shape how we educate youth, and how we train the workforce pipeline.

Influxes of labor to supply industry during periods of high-production activity has resulted in housing demand exceeding supply, particularly for multi-family and temporary housing. Economic activity centered in Midland and Odessa, and the demand for labor associated with that activity, generates upward pressure on rental prices and median home values. Building permits of 1,188 in Ector County and 1,289 in Midland County indicate a concerted effort to alleviate demand pressures.

Regional stakeholders must continue to collaborate in economic development efforts and pursue policies that maintain and expand the median household income levels of the region’s prosperous counties, and improve levels in the 6 counties below the Texas average.

Despite the consistent decrease in poverty rates throughout the region from 2000 to 2019, 6 counties maintained a higher poverty rate than Texas’ 13.6%. Including Dawson (20.6%), Howard (17.0%), Pecos (18.7%), Reeves (22.1%), Terrell (17.5%), and Upton (13.8%) Counties

EXECUTIVE SUMMARY

Policymakers and economic developers throughout the region must make continued, sustained investments in increasing available housing in counties and communities with significant population growth and those that are affected by increased economic activity, particularly by the oil and gas sector. Apartments and multi-family residences, and maintaining sufficient affordable housing should be a focus of the overall housing strategy.

Intentional efforts to incentivize younger residents to start businesses and pursue employment in the agriculture and livestock production are needed to promote growth. Approximately 43.7% of all producers are 65 and older in the Permian Basin. The aging purveyor population will likely result in contraction in future years without intervention.

To continue to facilitate commerce, promote entrepreneurship, and provide access to work from home opportunities for its residents, regional policymakers, economic developers, and stakeholders must continue to (1) improve broadband access by ensuring sufficient infrastructure exists as well as invest in efforts to (2) improve affordability in rural communities for both business and residential use and (3) engaging in proactive campaigns and efforts to encourage adoption among all residents.

According to the University of Wisconsin Population Health Institute and Robert Wood Johnson Foundation (2017 study), all 17 Permian Basin counties have a Primary Care Physician to Patient ratio higher than the state of Texas. Four counties reported no presence of Primary Care Physicians.

PBRPC and its stakeholders must continue continue their history of strong coordination and collaboration to build a more resilient regional economy, utilizing economic data and stakeholder feedback to address vulnerabilities and to build and support vibrant, healthy communities.

REGIONAL VITALS

In conducting the CEDS, the Permian Basin Regional Planning Commission (PRBPC) and CEDS Strategy Committee analyzed the strength and composition of key economic development asset categories (Regional Vitals) for the Permian Basin. Evaluation against these key Regional Vitals provides economic developers and communities the opportunity to assess and differentiate the Permian Basin other regions, and to develop and demonstrate competitive advantages that promote economic expansion.

Regional Vitals that we examined during the CEDS process include include:

1. Geography
2. Demographics / Socioeconomic Trends
3. Housing
4. Transportation and Logistics Infrastructure
5. Education Attainment
6. Employment and Economic Data
7. Internet Connectivity
8. Health
9. Quality of Place

GEOGRAPHY

The Permian Basin region consists of 17 counties: Andrews, Borden, Crane, Dawson, Ector, Gaines, Glasscock, Howard, Loving, Martin, Midland, Pecos, Reeves, Terrell, Upton, Ward and Winkler counties. The region extends 250 miles wide and 300 miles long and consists of 23,484 square miles. Pecos (4,763.9), Reeves (2,635.4), and Terrell (2,358.0) are the largest counties by land area, accounting for 94,799 square miles. The entire Permian Basin region includes 23,444 square miles, approximately 9.0% of the overall state of Texas.

The region's largest population centers are the Midland and Odessa Metropolitan Statistical Areas (MSA) with a combined population of 343,055 (2020), approximately two-thirds of the region's population. Midland and Ector Counties are densely populated at 152.0 and 152.8 population per square mile compared to Texas' 96.3. The remaining 15 counties in the region have population densities well below the statewide average.

The Permian Basin is economically unique compared to peer regions throughout the state and nation. Heavy concentration of Oil and Gas deposits has attracted investment and spurred more than a century of sustained exploration and production activity that dwarfs that of most regions, even those considered to be primarily energy economies.

Throughout its history, the region has reaped significant economic benefits from its natural resources, developing a robust and mature export-oriented energy cluster that has generated both tremendous individual wealth and significant Gross Regional Product (GRP).

Table: County Size and Population

County	Population per Square Mile	Land Area in Square Miles
Andrews	9.90	1,500.71
Borden	0.70	897.44
Crane	5.6	785.07
Dawson	15.40	900.31
Ector	152.80	897.69
Gaines	11.70	1,502.38
Glasscock	1.40	900.22
Howard	38.90	900.79
Loving	0.10	668.93
Martin	5.20	914.94
Midland	152.00	900.3
Pecos	3.30	4,763.85
Reeves	5.20	2,635.38
Terrell	0.40	2,358.03
Upton	2.70	1,241.32
Ward	12.80	835.60
Winkler	8.50	841.11
Texas	96.30	261,231.71

Source U.S. Census

DEMOGRAPHIC / SOCIOECONOMIC TRENDS

Table - Population Estimate and Projections

County	2010	2015	2020	% Change 2010 - 2020	Projected 2025
Andrews	14,786	17,952	18,879	21.7%	28,026
Borden	641	660	706	9.20%	704
Crane	4,375	5,190	4,765	8.18%	7,386
Dawson	13,833	13,671	12,974	-6.60%	13,506
Ector	137,130	158,753	167,701	18.20%	216,711
Gaines	17,526	19,735	21,996	20.30%	24,768
Glasscock	1,226	1,290	1,439	14.80%	1,437
Howard	35,012	37,856	36,540	4.18%	45,059
Loving	82	87	181	54.70%	93
Martin	4,799	5,367	5,816	17.50%	6,814
Midland	136,872	158,745	177,863	23.00%	223,525
Pecos	15,507	16,119	15,718	1.34%	16,806
Reeves	13,783	14,686	15,949	13.60%	16,806
Terrell	984	1,022	702	-40.20%	1,059
Upton	3,355	3,645	3,623	7.40%	4,331
Ward	10,658	11,914	12,097	11.90%	15,682
Winkler	7,110	8,062	7,887	9.85%	10,744
Total	417,679	474,754	504,836	17.3%	633,457

Source: Texas Demographic Center and STATS USA, US Census Bureau

Demographic and socioeconomic trends are changing the composition of the Permian Basin's population and workforce, presenting regional economic developers, educators, and stakeholders with both new challenges and new opportunities.

Populations in Midland and Ector Counties, the two most populous counties in the Permian Basin, grew 23.0% (223,525) and 18.20% (216,711) respectively from 2010 to 2020 according to the US Census Bureau. Combined these two counties accounted for 69.4% of the region's overall population growth during the time period.

Loving (54.7%), Midland (23.0%), and Andrews (21.7%) registered the highest percent growth during the timeframe. Only Terrell and Dawson Counties experienced negative growth from 2010 to 2020, Terrell contracting by 40.2% (1,059 residents) and Dawson by -6.6% (13,506 residents).

Looking forward, the Texas Demographic Center projections indicate increases in all 17 counties, adding 128,621 to the population by the year 2025, bringing the estimated total population to 633,457.

While sustained population increases are positive in that they add talent and capacity to the local workforce, policymakers are faced with complex challenges associated with continued urban expansion and limited and/or negative population growth in more rural communities.

RACE AND ETHNICITY

Projected growth among racial and ethnic groups in the Permian Basin is consistent with the trends throughout Texas. The majority White, Non-Hispanic population is projected to continue its contraction, declining -0.6% (-1,064) from 2021 to 2026. During the same period, Hispanic populations are projected to increase significantly, with the number classified as White, Hispanic increasing 41,841 (15.4%) and those classified as Black, Hispanic increasing 862 (18.1%).

Diversification and the growth racial and ethnic minority groups present economic developers, educators, and policy makers with an opportunity to train and develop a new, emergent workforce in the region that can drive new economic growth. More diverse communities also provide new opportunities for innovation and economic development as local communities and economies adapt to new cultures.

Table: Population by Race/Ethnicity

Race/Ethnicity	2021 Population	2026 Population	Change	% Change	2026 % of Cohort
White, Hispanic	272,346	314,187	41,841	15.4%	55.57%
White, Non-Hispanic	187,098	186,034	(1,064)	-0.6%	32.91%
Black, Non-Hispanic	25,726	29,145	3,419	13.3%	5.16%
Asian, Non-Hispanic	7,461	9,678	2,218	29.7%	1.71%
Two or More Races, Non-Hispanic	5,413	6,028	615	11.4%	1.07%
American Indian or Alaskan Native, Hispanic	4,938	5,612	674	13.6%	0.99%
Black, Hispanic	4,767	5,628	862	18.1%	1.00%
Two or More Races, Hispanic	3,024	3,531	507	16.8%	0.62%
American Indian or Alaskan Native, Non-Hispanic	2,419	2,894	475	19.6%	0.51%
Asian, Hispanic	1,062	1,319	256	24.1%	0.23%
Native Hawaiian or Pacific Islander, Non-Hispanic	513	743	230	44.8%	0.13%
Native Hawaiian or Pacific Islander, Hispanic	419	559	140	33.4%	0.10%

Source: Economic Modeling Specialists Inc. (EMSI)

To capitalize on these opportunities, however, regional stakeholders must effectively collaborate to address new challenges and adapt institutions, including education institutions and business development services, to increase positive outcomes within new populations

AGE

Table: Population by Age

Age Cohort	2021 Population	2026 Population	Change	% Change	2026 % of Cohort
Under 5 years	42,785	48,683	5,898	13.8%	8.61%
5 to 9 years	42,997	45,768	2,771	6.4%	8.10%
10 to 14 years	40,798	44,099	3,301	8.1%	7.80%
15 to 19 years	36,061	41,264	5,203	14.4%	7.30%
20 to 24 years	34,398	38,405	4,007	11.6%	6.79%
25 to 29 years	41,346	41,557	210	0.5%	7.35%
30 to 34 years	43,350	45,495	2,144	4.9%	8.05%
35 to 39 years	39,740	44,711	4,971	12.5%	7.91%
40 to 44 years	33,423	41,161	7,737	23.1%	7.28%
45 to 49 years	28,567	34,376	5,809	20.3%	6.08%
50 to 54 years	26,550	28,693	2,143	8.1%	5.08%
55 to 59 years	25,662	25,315	(347)	-1.4%	4.48%
60 to 64 years	24,268	23,247	(1,021)	-4.2%	4.11%
65 to 69 years	18,830	20,558	1,728	9.2%	3.64%
70 to 74 years	13,903	16,095	2,191	15.8%	2.85%
75 to 79 years	9,150	11,463	2,313	25.3%	2.03%
80 to 84 years	6,555	7,338	783	11.9%	1.30%
85 years and over	6,804	7,133	329	4.8%	1.26%

Source: Economic Modeling Specialists Inc. (EMSI)

Population growth projections from Economic Modeling Specialists Inc. (EMSI) by age cohort from 2021 to 2026 provide additional insights.

Among the age cohorts projected to grow most aggressively: the 40 to 44 cohort is expected to increase 23.1% (7,737) and the 45 to 49 cohort by 20.3% (5,809). The 20 to 24 (11.6% / 4,007) and 35 to 39 (12.5% / 4,971) cohorts, are also projected to grow faster than the region overall. Strong positive growth in these age cohorts is a significant economic development asset as these are the prime working years for individuals in the labor force.

The region also projects to have strong growth in key younger age cohorts. The under 5 (13.8%, / 5,898) and 15 to 19 years (14.4% / 5,203) cohorts both project to increase at a faster rate than the region overall.

Strong and sustained growth across younger age cohorts creates a positive economic development climate for the Permian Basin. The comparatively young population and workforce creates a compelling case for the region to be economically competitive and attractive to business seeking to expand operations, startup, or relocate.

MEDIAN HOUSEHOLD INCOME

Table - Median Household Income

County	2000	2019	Percent Change 2000 - 2019
Andrews	$35,617	$74,918	110.3%
Borden	$31,063	$71,926	131.5%
Crane	$34,831	$68,626	97.0%
Dawson	$28,528	$48,165	68.8%
Ector	$32,259	$65,564	103.2%
Gaines	$30,940	$67,171	117.1%
Glasscock	$37,503	$93,759	150.0%
Howard	$30,765	$61,112	98.6%
Loving	$40,114	$88,487	120.6%
Martin	$31,990	$68,745	114.9%
Midland	$39,205	$85,811	118.9%
Pecos	$28,374	$52,763	86.0%
Reeves	$24,194	$48,990	102.5%
Terrell	$36,531	$45,677	25.0%
Upton	$30,899	$58,908	90.6%
Ward	$30,714	$61,396	99.9%
Winkler	$32,206	$64,894	101.5%
Texas	$39,927	$61,874	55.0%

Source: STATS USA, U.S. Census

Another key challenge for policymakers is improving the economic security of residents throughout the region. The median household income, per capita income, and percent of residents of poverty are measures of the effect of these efforts.

All 17 of the Permian Basin counties showed an increase in median household income from 2000 to 2019. All but one county, Terrell, outpaced Texas' 55.0% growth during that timeframe. Glasscock County at 150.0% and Borden at 131.5% experienced the largest percentage growth, while Terrell (25.0%), Dawson (68.8%), and Pecos (86.0%) Counties experienced the slowest expansion.

Two of the region's least populous counties, Glasscock with 1,439 (2020) residents and Loving with 1818 (2020) residents registered the highest median household incomes in 2019 at $93,759 and $88,487. In total, 7 of the region's 17 counties had a 2019 median household income lower than Texas at $61,874, with the lowest being Terrell ($45,667), Dawson ($48,165), and Reeves ($48,990) Counties. This represents a substantial improvement from 2000, when only one county had a median household income that exceeded the state.

Regional stakeholders must continue to collaborate in economic development efforts and pursue policies that maintain and expand the median household income levels of the region's prosperous counties, and improve levels in the 7 counties below the Texas median household income.

PER CAPITA INCOME

Evaluation of per capital income levels and growth from 2010 to 2019 provides additional context and insights into the economic prosperity of the region and its member counties.

In the Permian Basin region in 2020, per capital income exceeded the state of Texas ($55,129) in 6 of 17 counties. Midland county registered the highest per capital income for the region at $126,631. Neighboring Ector County, home to Odessa, had a per capital income of $49,887. The variance between the two counties is noteworthy as they include the sister cities of Midland and Odessa, highlighting the disparity between the two communities.

Glasscock County also has a significantly higher per capital income than the state at $87,334. Pecos, Dawson, and Reeves Counties, meanwhile, registered the lowest per capita incomes at $40,391, $42,595, and $44,232 respectively

Per capita income grew faster than the state of Texas (19.0%) in all 17 Permian Basin counties from 2010 to 2020. Winkler, Reeves, and Loving counties experienced the largest percentage increases at 96.8%, 92.6%, and 77.9% respectively. Upton at 28.9% and Dawson at 30.9% experienced the most modest gains.

Table - Per Capita Income

County	Per Capita Personal Income 2010	Per Capita Personal Income 2020	Per Capita Personal Income Change 2010 - 2020
Andrews	$36,876	$50,248	36.3%
Borden	$49,540	$66,783	34.8%
Crane	$32,813	$49,749	51.6%
Dawson	$32,551	$42,595	30.9%
Ector	$35,520	$49,887	40.4%
Gaines	$34,193	$47,826	39.9%
Glasscock	$51,115	$87,334	70.9%
Howard	$30,081	$45,105	49.9%
Loving	$27,583	$49,072	77.9%
Martin	$44,666	$64,602	44.6%
Midland	$75,530	$126,631	67.7%
Pecos	$28,377	$40,391	42.3%
Reeves	$22,965	$44,232	92.6%
Terrell	$35,887	$61,631	71.7%
Upton	$39,112	$50,428	28.9%
Ward	$33,200	$48,109	44.9%
Winkler	$31,641	$62,259	96.8%
Texas	$46,324	$55,129	19.0%

Source: STATSAMERICA

POVERTY

Table - Poverty

County	Poverty Rate 2000	Poverty Rate 2019	Decrease/Increase 2000 - 2019
Andrews	14.9%	10.2%	-4.7%
Borden	10.0%	10.6%	0.6%
Crane	13.9%	9.6%	-4.3%
Dawson	25.7%	20.6%	-5.1%
Ector	18.4%	12.1%	-6.3%
Gaines	21.1%	13.2%	-7.9%
Glasscock	11.0%	7.9%	-3.1%
Howard	21.2%	17.0%	-4.2%
Loving	18.1%	7.1%	-11.0%
Martin	18.6%	12.1%	-6.5%
Midland	14.3%	9.9%	-4.4%
Pecos	23.0%	18.7%	-4.3%
Reeves	28.3%	22.1%	-6.2%
Terrell	22.2%	17.5%	-4.7%
Upton	17.5%	13.8%	-3.7%
Ward	18.6%	12.4%	-6.2%
Winkler	16.6%	12.5%	-4.1%
Texas	12.0%	13.6%	1.6%

Source: STATS USA, U.S. Census

The decline in poverty rates in 16 of 17 counties from 2000 to 2019 further affirms the success of regional policies and initiatives aimed at improving economic security and prosperity.

Borden is the lone county to show an increase in poverty during that time period, increasing .60%. By contrast, Texas also showed an increase of 1.60% in the poverty rate to 13.60% when compared to 12.0% in 2000.

The most substantial decrease in poverty rates was in Loving County, which showed a decrease of 11.00% to 7.10% in 2019.

Despite the consistent decrease in poverty rates throughout the region from 2000 to 2019, 6 counties maintained a higher poverty rate than Texas' 13.6%. Including Dawson (20.6%), Howard (17.0%), Pecos (18.7%), Reeves (22.1%), Terrell (17.5%), and Upton (13.8%) Counties.

HOUSING

Maintaining sufficient housing stock for the growing Permian Basin population is of critical importance for the region. During periods of increased oil and gas production, the in-migration of workforce into the region in order to meet production needs is substantial. This in-migration results in spikes in housing demand, putting upward pressure on occupancy rates and home sales and rental prices. These effects can quickly leave Permian Basin communities with little to no affordable housing options for a workforce that surges rapidly with new economic activity.

In an August 2019 report on housing in the Permian Basin, the Perryman Group anticipates that "recent advances in the petroleum sector have led major analysts and energy companies to broadly anticipate expansive increases in Permian Basin production over the next few years," particularly in the Midland area. The report goes on to encourage that "additional land be available for residential development" in anticipation of a "profound implications for housing" to allow the region to benefit from the increased economic activity.[1] The impact of increased of activity in the oil and gas sector is not limited to Midland County, however. Neighboring Ector County, which includes Odessa, is home to much of the workforce employed in that sector, and rural communities experience the same or often amplified effects due to drilling and production occurring in their area and the strong presence of downstream suppliers and service companies throughout the region.

Policymakers and economic developers throughout the region must make continued, sustained investments in increasing available housing in counties and communities with significant population growth and those that are affected by increased economic activity, particularly by the oil and gas sector. Apartments and multi-family residences, and maintaining sufficient affordable housing should be a focus of the overall housing strategy.

Recent examples of successes in addressing housing challenges throughout the region, include:

- In February 2020, a 360 unit modular construction project was announced in La Mesa. The project named Vista Park is the largest modular construction project in Texas history.[2]
- The City of Pecos is home to a new 144-unit apartment complex that broke ground in October 2019. The units are expected to house 300 people.[3]

[1] https://www.perrymangroup.com/publications/infographic/2019/08/15/priority-midland-by-the-numbers-housing/
[2] https://www.lamesadevelopment.org/_files/ugd/8bdbfe_b24c7d363bd84b9ab1cb4254a1a3b836.pdf
[3] https://pecosedc.com/news/groundbreaking-held-west-side-apartments

HOUSING UNITS

Table: Housing Units, 2019-1

County	Housing Units	Owner Occupied Housing	Median Value of Owner Occupied Units	Renter Occupied Housing Units	Median Gross Rent	Vacant Housing Units	Building Permits (2020)
Andrews	6,296	5,573	$143,900	1443	$1,028	723	16
Borden	405	172	$153,300	55	-	178	0
Crane	1,681	1,217	$100,400	204	$835	260	1
Dawson	5,187	2,995	$73,400	1,327	$645	865	0
Ector	58,393	34,087	$140,500	18,443	$1,059	5,863	1,188
Gaines	6,501	5,812	$150,900	1,319	$722	689	2
Glasscock	522	265	$229,200	138	$904	119	0
Howard	13,180	7,235	$99,000	3,829	$868	2,116	45
Loving	66	19	-	11	-	36	0
Martin	1,977	1,251	$148,000	443	$821	283	3
Midland	61,301	38,145	$213,100	18,853	$1,274	4,303	1,289
Pecos	5,754	3,363	$87,300	1,293	$842	1,098	47
Reeves	4,641	2,549	$64,800	969	$871	1,123	73
Terrell	785	389	$76,400	29	$392	367	0
Upton	1,686	973	$66,900	359	$717	354	0
Ward	4,830	2,846	$86,800	1,132	$899	852	0
Winkler	3,044	2,085	$62,700	534	$836	425	2
Permian Basin	176,249	108,976	$118,538	50,381	$848	19,654	2,666
		61.83%	68.71%	28.58%	Average	11.15%	
Texas	11,283,353	6,179,278	$172,500	3,805,848	$1,045	1,298,766	230,503
		54.76%		33.72%		11.51%	

Source: STATS USA, U.S. Census

Evaluation of key US Census statistics further articulates the region's housing challenge.

While the average rent of $848 for the region is significantly lower than Texas' $1,045, Midland and Ector Counties rent exceeded the state at $1,274 and $1,059 respectively. Similarly, the average median home value of the Permian Basin is $118,538, 68.71% lower than the overall median value of Texas at $172,500. However, Midland County at $213,100 and Glasscock County at $229,200 had median home values greater than the $172,500 for Texas. Ector County's at $140,500 median home value also significantly exceeded regional average, despite registering significantly below Texas.

Economic activity centered in Midland and Odessa, and the demand for labor associated with that activity, generates upward pressure on rental prices and median home values. Building permits of 1,188 in Ector County and 1,289 in Midland County indicate a concerted effort to alleviate demand pressures.

HOME SALES

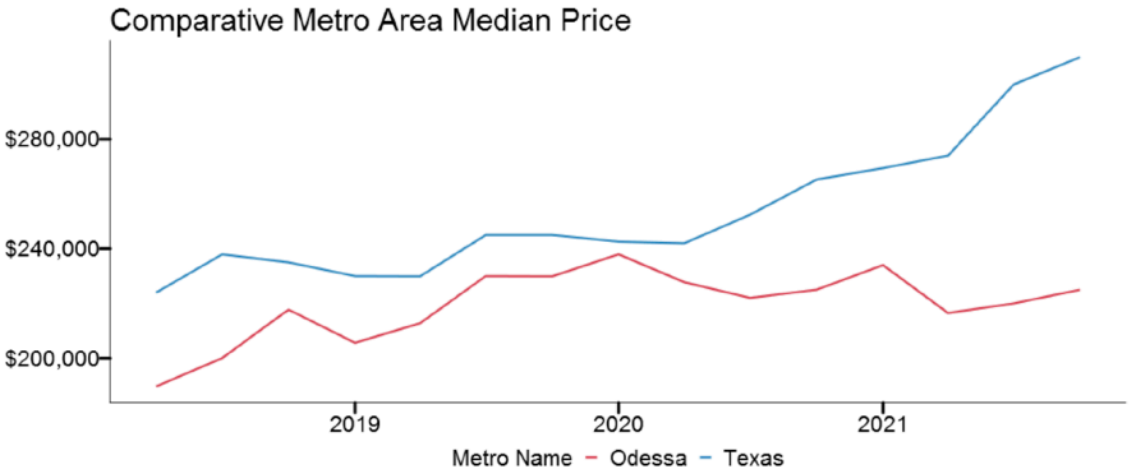


Table - Odessa MSA Housing Report, 2015 to 2020

Date	Sales	Dollar Volume	Average Price	Median Price	Total Listings	Months Inventory
2015	1,109	211,169,253	190,414	175,000	318	4.2
2016	1,100	198,354,215	180,322	165,750	459	4.7
2017	1,328	255,508,708	192,401	175,000	373	2.2
2018	1,706	373,729,756	219,068	203,250	196	1.3
2019	1,680	405,286,406	241,242	227,000	257	2.2
2020	1,434	339,998,138	237,098	228,000	442	4.7

Source: Texas A&M Real Estate Center

While Texas A&M Real Estate Center data on home sales is not available for the entire Permian Basin region, analysis of sales data from the Odessa and Midland Metropolitan Statistical Areas (MSA) provides insights into the availability and affordability of housing in the region.

The single family residential housing activity report for the Odessa Metropolitan Statistical Area (MSA) from the Texas A&M Real Estate Center shows the that both the average and median sales price of homes (annualized) climbed steadily between 2015 and 2020. Average price increased by 24.5% ($46,684) during the period, while median price rose by 30.3% ($53,000).

Home sales peaked in 2018 at 1,706 and fell to 1,434 in 2020. Both monthly listings (196) and months of inventory(1.3) dipped to a low for the period in 2018, but rebounded substantially climbing to 442 listings and 4.7 months inventory in 2020.

HOME SALES

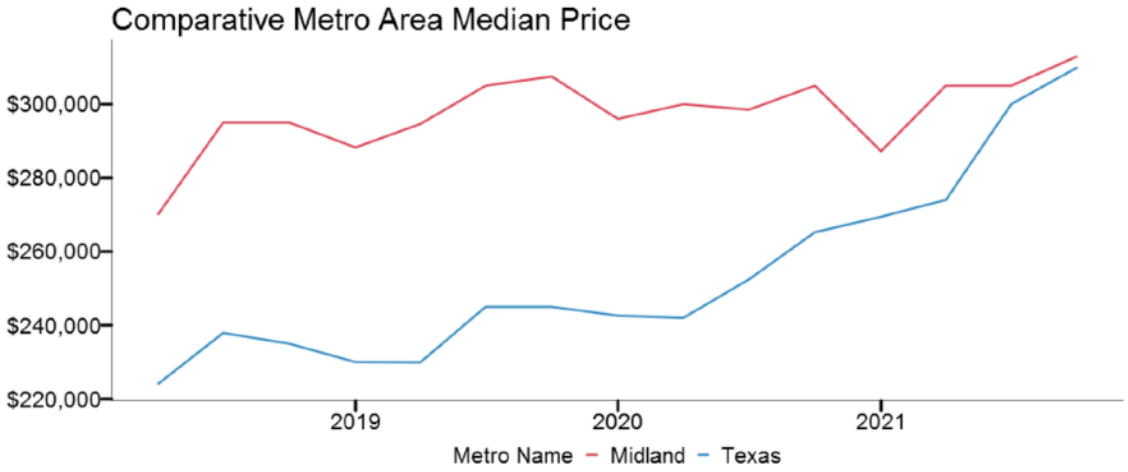


Table - Midland MSA Housing Report, 2015 to 2020

Date	Sales	Dollar Volume	Average Price	Median Price	Total Listings	Months Inventory
2015	2,025	552,114,414	272,649	240,000	579	3.3
2016	2,067	570,213,167	275,865	235,000	639	3.2
2017	2,756	808,010,284	293,182	254,950	431	1.3
2018	2,818	906,323,454	321,619	290,000	329	1.5
2019	2,896	993,309,881	342,994	300,000	491	2.4
2020	2,565	883,434,116	344,419	299,900	775	3.5

Source: Texas A&M Real Estate Center

The single family residential housing activity report for the Midland Metropolitan Statistical Area (MSA) from the Texas A&M Real Estate Center shows the that both the average and median sales price of homes (annualized) climbed steadily between 2015 and 2020. Average price increased by 26.3% ($71,770) during the period, while median price rose by 24.9% ($59,000).

Home sales climbed each year from 2015 to 2019, peaking at 2,896 before falling to 2,565 in 2020. Monthly listings (329) dipped to a low for the period in 2018 with 1.5 months of inventory. Both listings (775) and months inventory (3.5) increased substantially in 2020.

Steady increases in sales prices from 2015 to 2020 in both the Odessa MSA and Midland MSA reinforce the need for continued focus by regional economic developers and community leaders in ensuring affordable housing options are available to area residents.

TRANSPORTATION AND LOGISTICS

The Permian Basin is unique in the maturity of it's multi-modal transportation and logistics infrastructure. The vastness of the region, combined with the materials moving requirements of key economic clusters and its proximity along east-west and north-south international trade corridors, has required the development of efficient rail and roadways. This development has been supplemented by improvements in airport network, anchored by Midland International Air and Space Port, and investments in intermodal ports such as the McMahon-Wrinkle Airport and Industrial Park.

The region's roadways include Interstates 10 and 20 bisecting the region East to West and providing direct connection to El Paso, San Antonio, and Dallas/Fort Worth. The region also boasts a major north-south connection to Lubbock and Amarillo in HWY 87/IH 27, which connects to IH-40 and a strong network of State Highways, County and Local Roadways that are significant economic assets for the region. The region is also central to the La Entrada al Pacifico Trade Corridor and the Ports to Plains corridor connecting Mexico and Canada. Interstate project developments approved by USDOT and TXDOT include improvement project for I-20 through Midland Odessa corridor to widen and accommodate increased traffic; I-27 expansion from Lubbock to Laredo, extending the North American trade corridor from Canada to Mexico; the I-14 project planned for corridor segment to extend to Midland. These projects will guarantee expanded markets and trade opportunities for the current and future industries for the Permian Basin. The Permian Basin Freight and Energy Sector Transportation Plan also resulted in multiple projects funded for key energy sector areas of the Permian Basin. (https://ftp.txdot.gov/pub/txdot/get-involved/oda/4yrletting/120921-active-projects-map.pdf)

The Permian Basin rail system is comprised of east-west Union Pacific Railroad Company and Texas Pacifico Transportation Limited railways as well as north-south Burlington Northern Santa Fe Corporation railways. This dynamic allows for the efficient import and distribution of materials and goods from the region providing an important economic advantage for companies with a footprint in the region. Recent years have seen sustained private and public investment in improving capacity and access to the critical rail arteries.

The airport infrastructure for the Permian Basin region is anchored by the Midland International Air and Space Port, a 1600 acre municipally owned airport located approximately midway between Midland and Odessa that serves more than 900,000 passengers annually. 1 of 12 FAA licensed commercial spaceports, Midland International is the first primary commercial service airport certified by the FAA as a spaceport. The region is further supported by a strong network of regional/municipal airports including Odessa, Midland, and Big Spring.

TRANSPORTATION AND LOGISTICS

While the region's infrastructure is a strong economic asset for the region, notable challenges to maintain that competitive advantage exist and must continue to be addressed.

- The Permian Basin has strong public transportation assets in the region, but mobility and public transit services are a continued challenge in both urban and rural areas. Assets for region includes the Midland Odessa Urban Transit District operating EZ Rider bus services for the urban areas; as well as West Texas Opportunities which operates the Rural Transit District TRAX system in both the rural and urban areas' eligible population. Continued enhancement of these services is a regional priority.

- Stakeholders in a 2021 TXDOT I-20 Corridor Study by TXDOT noted several challenges for the Permian Basin region including poor pavement condition, frontage road flooding events, and unsafe ramps. Issues have the potential to be compounded in the coming years as TXDOT projections indicated increased volumes the West segment, especially in the Midland area, through 2050 with 40% to 60% being truck traffic along the West segment.[1]

- The MOTOR MPO cited challenges in public transportation in their South Midland Mobility study noting "the area currently has little to no accommodations for alternative modes of transportation" and "low density and rural atmosphere" limits choices as alternative modes of transportation (I.e., bicycle paths, pedestrian paths, etc.).

- The dispersed nature of economic activity throughout the region, particularly due to the significance of oil and gas exploration which occurs largely in low-population rural areas, drives the need for multi-modal solutions including roadways, air, and railways.

- According to a 2020 Permian Basin Freight Study found regional "freight, especially in terms of daily trucks, has long been undercounted in TXDOT modeling" and the region was responsible for over 30% of all freight tonnage in the state in 2018 and 16 times more per capita.[2]

Economic developers and key stakeholders have a strong history of sustained investment in developing transportation infrastructure and aggressive business development that capitalizes on this asset. Continued development of regional assets such as the Midland International Air and Space Port, McMahon-Wrinkle Airport, and investment along the Ports-to-Plains Alliance Corridor. Regional leaders should continue to invest in the region's transportation and logistics assets to maintain and build on this regional economic competency.

[1] I-20 Texas Corridor Study Meeting Notes
[2] 2020 MOTRAN Annual Report

EDUCATIONAL ATTAINMENT

"If we improve education, these children are going to be our future adults and educated to take on future jobs and responsibilities in our community. They will become our future leaders." - Dr. Sara Safarzadeh Amiri[1]

The Permian Basin's education and workforce development system remains strong and poised to respond to the challenge of building skilled, competitive workforce.

The region's Workforce Development Board maintains effective, collaborative partnerships with secondary and post-secondary school systems. These partnerships allow for the preparation of an emerging workforce ready for career opportunities and pathways supported by local industry.

However, as shown in the Education Tables, the region's workforce, is low-skilled, with overall higher educational and certification attainment rates lower than the state. While the region's education and workforce infrastructure is substantial, continued efforts are needed to ensure the workforce, particularly youth, are acquiring the certifications, skills and credentials needed to compete in today's and tomorrow's economy.

In addition, the COVID-19 pandemic has caused the workforce to transition to essential, virtual and digital remote home office workers and forced educational institutions to provide training through online and blended formats resulting in a need for a workforce with strong digital/computer literacy skills. The effect of the pandemic has reshaped and will continue to re-shape how we educate youth, and how we train the workforce.

The region is responding to these challenges by developing progressive workforce and education programs and partnerships that (1) develop the transferable and technical skills necessary to be competitive within its Adult Labor Force, (2) provide for rapid skill attainment and credentialing for area youth in secondary and post-secondary education and training programs, and (3) build strong educational foundations through effective early childhood education.

Stakeholders in the Permian Basin must continue to invest in strategies to increase the educational attainment of residents to meet the educational demand of industries located within the Permian Basin .

EDUCATIONAL ATTAINMENT

In depth analysis of 2019 Educational Attainment data from the US Census Bureau (Table below) further articulates the challenges facing the region.

The Permian Basin at 22.8% also has more population 25+ with some college but no degree when compared to the 21.2% for Texas. This population is, likewise, an opportunity target for educators and policymakers to convert individuals with some level of post-secondary attainment to individuals with industry recognized credentials through coordinated reengagement efforts and stackable credentialing educational program structures.

At the higher educational attainment levels, 6.9% (20,676) of Permian Basin resident's highest attainment level is an Associate's degree, 13.2% (39,363) is a Bachelor's degree, and 5.5% (16,418) is a Master's degree. By comparison, Texas' educational attainment levels are 7.5%, 20.0%, and 10.8% respectively.

Observations in educational attainment data are supported by results from the 2021 PBRPC CEDS survey of community stakeholders. The survey used scale categories of Labor Surplus, Sufficient Labor, Labor Shortage, and Not Sure. Among the 27 respondents, broad labor shortages were identified across standard occupational classifications including: 63% in Healthcare Practitioners and Technical Occupations, 63% in Healthcare Support Occupations, 63% in Food Preparation & Serving Related Occupations, 63% in Installation, Maintenance, & Repair Occupations, 53.8% in Construction & Extraction Occupations, 51.9% in Protective Service Occupations, 51.9% in Transportation & Material Moving Occupations, and 51.9% in Education, Training, & Library Occupations.

Despite noted labor shortages, survey respondents broadly indicated residents had sufficient access to post-secondary opportunities. Among the 28 survey respondents, 89.3% indicated the community had sufficient access to community colleges, 71.4% to universities, and 85.2% to online colleges and universities. Full survey results are included as a CEDS addendum. Among the 299,160 residents age 25+ in the region, 22,0% have achieved less than a high school diploma or GED. This far exceeds the 15.4% rate for Texas. At a higher attainment level, 29.7% of Permian Basin residents age 25+ have attained a high school diploma or equivalent. That cohort percentage is higher than the rate for Texas at 25.2%. The combined 51.7% of Permian Basin residents age 25+ with a high school diploma or GED or lower represents a significant opportunity to engage and positively impact the overall education and skill level of the region's workforce through conversion to entry level attainment/credentialing. For contrast, the combined percentage of Texas residents with the same attainment levels was 40.6%.

[1]https://www.dallasfed.org/cd/communities/2021/1115

EDUCATIONAL ATTAINMENT

Table - Educational Attainment, Population Age 25 and Older, 2019

County	Total Population 25 and Older	Less than 9th Grade	9th to 12th, No Diploma	High School Graduate (includes equiv.)	Some College, No Degree	Associate Degree	Bachelor's Degree	Graduate, Professional or Doctorate Degree
Andrews	10,700	1,507	1,462	3,739	2,063	623	814	492
Borden	418	9	13	84	121	26	113	52
Crane	2,902	318	277	951	679	250	318	109
Dawson	8,084	1,188	1,244	2,610	1,588	303	948	203
Ector	95,420	9,034	13,913	28,933	22,177	6,676	10,362	4,325
Gaines	11,319	3,122	1,200	3,376	1,576	750	930	365
Glasscock	887	212	59	166	129	80	166	75
Howard	24,691	2,110	2,832	8,317	6,617	1,698	2,100	1,017
Loving	71	0	14	14	29	14	0	0
Martin	3,321	317	434	1,095	718	149	328	280
Midland	105,138	6,477	9,807	26,985	24,735	8,349	20,563	8,222
Pecos	10,544	1,807	1,450	3,788	2,119	343	631	406
Reeves	10,500	1,697	1,480	3,433	1,953	646	915	376
Terrell	754	53	49	202	301	10	83	56
Upton	2,430	309	285	1,001	503	98	151	83
Ward	7,369	759	816	2,671	1,826	379	675	243
Winkler	4,612	616	805	1,396	1,133	282	266	114
Permian Basin Ttl	299,160	29,535	36,140	88,761	68,267	20,676	39,363	16,418
	299,160	9.87%	12.08%	29.67%	22.81%	6.91%	13.15%	5.48%
Texas	18,772,550	1,436,483	1,445,905	4,734,422	3,976,607	1,402,600	3,750,797	2,025,736
	18,772,550	7.65%	7.70%	25.21%	21.18%	7.47%	19.98%	10.79%

Source: U.S. Census Bureau, American Community

EDUCATIONAL ATTAINMENT

Table - Educational Attainment Age 25+ by Race/Ethnicity

Race/Ethnicity	2021 Population	2026 Population	2021 Less Than High School	2021 High School Diploma	2021 College Degree
White, Non-Hispanic	130,203	126,474	8.9%	53.1%	38.0%
Black, Non-Hispanic	16,211	18,299	11.2%	62.8%	25.9%
American Indian or Alaskan Native, Non-Hispanic	1,755	2,135	30.5%	43.4%	26.1%
Asian, Non-Hispanic	4,983	6,458	13.9%	25.9%	60.3%
Native Hawaiian or Pacific Islander, Non-Hispanic	266	393	10.4%	47.5%	42.1%
Two or More Races, Non-Hispanic	2,311	2,929	19.6%	52.9%	27.5%
White, Hispanic	155,128	180,944	33.3%	51.5%	15.3%
Black, Hispanic	2,204	2,899	33.4%	51.8%	14.8%
American Indian or Alaskan Native, Hispanic	3,027	3,733	33.7%	51.6%	14.8%
Asian, Hispanic	509	694	33.5%	52.1%	14.4%
Native Hawaiian or Pacific Islander, Hispanic	223	343	33.2%	51.4%	15.3%
Two or More Races, Hispanic	1,329	1,839	33.2%	52.2%	14.6%
	318,147	347,139	21.8%	52.3%	26.0%

Source: Economic Modeling Specialists Inc. (EMSI)

Analysis of educational attainment age 25+ by Race and Ethnicity (projections), indicates educational institutions, policy makers, and stakeholders must work proactively and strategically to improve overall educational attainment in the region. Many of the fastest growing Racial and Ethnic groups have historically lower educational attainment levels, introducing the potential to further reduce the educational attainment level of the region

The White, Hispanic cohort, projected to add 25,816 individuals (+15.4%) thru 2026, has both a high incidence of less than a high school diploma or equivalent (33.3%) and low incidence of attaining a college degree (15.3%).

Although smaller in aggregate, other Hispanic Race/Ethnicity groups likewise have high incidence of less than high school diploma attainment and low incidence of college degree attainment.

POST-SECONDARY COMPLETIONS

The region has made good progress in 'growing your own' in increasing the number of post-secondary completions by local institutions. From 2015 to 2020, Midland college increased post-secondary annual completions by 53% (781 total completions) and UT Permian Basin by 45% (1,396 total completions between 2015 to 2020).

Table - Post Secondary Completions by Institution, Permian Basin Post-Secondary

Description	All Programs > All Completions > 2020 Completions	All Programs > All Completions > % Completions Change (2015-2020)
Howard College	563	15%
Midland College	781	53%
Odessa College	1,436	19%
Southwest Collegiate Institute for the Deaf	28	4%
The University of Texas Permian Basin	1,396	45%
	4,204	32%

Source: Economic Modeling Specialists Inc. (EMSI)

From 2015 to 2020, Permian Basin has realized increases in post-secondary completions in key degrees, indicating a focused, coordinated effort among stakeholders that includes articulation agreements and effective advisory panels. Since 2015:

- Registered Nursing completions increased by 120%
- Business Administration/Management increased by 163%
- Education Leadership increased by 191%
- Business/Commerce, General increased by 100%
- Biology/Biological Sciences, General increased by 49%

POST-SECONDARY COMPLETIONS

Table - Post Secondary Completions by Program, Permian Basin Post-Secondary

CIP Code	Description	All Programs > All Completions > 2020 Completions	All Programs > All Completions > % Completions Change (2015-2020)
24.0102	General Studies	758	29%
52.0201	Business Administration and Management, General	469	163%
51.3801	Registered Nursing/Registered Nurse	238	120%
42.0101	Psychology, General	148	49%
43.0107	Criminal Justice/Police Science	131	30%
51.3901	Licensed Practical/Vocational Nurse Training	118	13%
13.0401	Educational Leadership and Administration, General	102	191%
52.0101	Business/Commerce, General	98	100%
13.1001	Special Education and Teaching, General	94	12%
12.0401	Cosmetology/Cosmetologist, General	90	36%
11.0101	Computer and Information Sciences, General	78	32%
48.0508	Welding Technology/Welder	76	13%
15.0701	Occupational Safety and Health Technology/Technician	70	-11%
52.0301	Accounting	70	15%
26.0101	Biology/Biological Sciences, General	58	49%

Source: Economic Modeling Specialists Inc. (EMSI)

EDUCATION INITIATIVES AND PARTNERSHIPS

While educational attainment will be a challenge for policymakers in the Permian Basin for the foreseeable future, numerous initiatives, partnerships, and investments are active and underway to improve the positively affect the education levels and workforce preparedness of residents. The list below provides a sampling of this activity.

The Education Partnership of the Permian Basin is orchestrating efforts around improving education quality across the region, from birth through workforce entry. Among the numerous initiatives and successes of the group, EPPB was awarded $300,000 from philanthropic sources to support its plans to address education and workforce challenges in the community, as well as obtaining training and coaching from the Dallas Fed to increase the impact of its programs. (https://www.educatepb.com)

The Midland Development Corporation cemented a long-term partnership with University of Texas Permian Basin (UTPB) in 2017, committing $3M to complete the build-out of the third floor of UTPB's College of Engineering in Midland, $2M to remodel the Center for Energy and Economic Diversification (CEED) building into an incubator and makerspace, and $5M over twenty-five years to provide for staffing and program needs for the incubator program.[2]

In 2021, Odessa College committed to invest $500,000 on new downtown projects, including construction of a school building that would house entrepreneurial classes and a business incubator. The total estimated cost of the project is $2 million. The $500,000 will come from the funding it received from Mackenzie Scott.[3]

Texas Tech Health Sciences Center and Odessa College announced an articulation agreement aimed at increasing the number of bachelor's degree prepared nurses in the Permian Basin. Students will get their associate degree from OC and can take their bachelor's degree in nursing courses entirely online. [4]

The above is just a sampling of activity in the region. Numerous other initiatives, partnerships, and investments are underway to drive improvements to educational attainment levels and workforce preparedness. Policymakers must continue to be aggressive in pursuing solutions to this persistent regional challenge.

[1]https://www.dallasfed.org/cd/communities/2021/1115
[2]https://www.midlandtxedc.com/media/userfiles/subsite_15/files/resource/Annual%20Report_1_19_21.pdf
[3] https://odessatex.com/oc-prepared-invest-500000-improve-downtown/
[4] https://odessatex.com/oc-tech-announce-pathway-bsn/

EMPLOYMENT AND ECONOMIC DATA

"Supporting the structure of the energy sector in the Permian Basin through the current challenges can help ensure that it is in place and ready to resume production growth once the COVID-19 and oil market oversupply conditions are moderated."
- Perryman Group, 2020 Keeping It Together Report[1]

The COVID-19 pandemic is unprecedented in its scale and has created workforce supply and demand shock as evidenced in the recent volatility the labor force participation, employment, and unemployment claims. The Permian Basin was not immune from the effects of the pandemic, and in fact experienced compounding pressures when oil and gas production dropped significantly in the early days of COVID-19. Much has been written about how to successfully emerge from the current crisis. For the Permian Basin, the Perryman Group's report, Keeping It Together!! Preserving the Permian Basin Energy Sector and the Odessa Economy through the COVID-19 and Related Oil Market Challenges, May 2020, provides an effective roadmap for the region.

The Perryman Group's recommendation is the following actions should be taken, supported, and/or continued:

1. *"Utilize a taskforce of public-sector and private-sector community and business leaders,*
2. *Support grant and loan programs to affected businesses,*
3. *Provide assistance to local families,*
4. *Establish a clearinghouse for information related to available assistance and utilize available planning resources,*
5. *Engage in an information campaign to communicate to the community how the current downturn is different from others*
6. *Seek to provide universal broadband availability across the area, and*
7. *Engage in a marketing and advocacy campaign to inform State and federal leaders and major private-sector constituencies of the importance of the Permian Basin."*

While the intent of the recommendation is to secure *"Permian Basin as the epicenter of efforts to meet future global energy needs,"* the strategy provides an appropriate blueprint for a broader response by policymakers, stakeholders, regional advocates, etc. to ensure the region emerges from the recent crises with a strong labor force and employment base intact.

[1]https://www.perrymangroup.com/publications/report/2020/05/15/keeping-it-together/

EMPLOYMENT BY INDUSTRY

Looking at TWC classified data shown in the following Table, and comparing 2019 to 2021 average employment, the Permian Basin region decreased by 38,410 jobs. The largest decrease occurred in Natural Resources and Mining, which realized a net loss of -18,454 in payrolls. While the reduction in employment due to the pandemic was significant, the region was also experiencing compounding pressures and employment reductions due to fluctuations in energy prices.

The Oil and Gas Industry is subject to a range of external pressures including, not only the pandemic, but also foreign production and demand, economic cycles, regulatory policy, tariffs, weather, etc. The resultant volatility has led to a history of boom-bust cycles of economic activity for the region that is challenging at both its highs and lows - taxing capacity on the high side and challenging maintenance on the low. Fierce competition for experienced labor to supply workforce demands during booms has resulted in significant wage pressures and high labor costs that impacts all industries. The recent loss of jobs in Natural Resources and Mining and overall loss of jobs will have a notable economic impact in the Permian Basin region.

Table - Average Employment by Industry

Industry	2019	2020	2021	Change 2019 - 2021
Natural Resources and Mining	58,820	55,465	40,366	-18,454
Construction	22,563	20,923	15,680	-6,883
Manufacturing	11,754	10,716	8,684	-3,070
Trade, Transportation and Utilities	53,261	53,105	47,029	-6,232
Information	2,258	2,210	1,481	-777
Financial Activities	10,034	10,637	9,468	-566
Professional and Business Services	17,011	17,693	15,836	-1,175
Education and Health Services	37,862	39,046	38,660	798
Leisure and Hospitality	24,213	24,799	22,566	-1,647
Other Services	7,188	7,104	6,238	-950
Public Administration	7,035	7,469	7,407	372
Unclassified	106	60	280	174
Total Permian Basin	252,105	249,227	213,695	-38,410

Source: Texas Workforce Commission 2020 and 2021 1st Quarter Census of Employment and Wages (QCEW)

EMPLOYMENT AND ECONOMIC DATA

The Construction Industry also experienced a significant contraction during the period, shedding 6,883 jobs. Similarly, the Trade, Transportation and Utilities sector eliminated 6,232 jobs.

Public Administration (372 jobs), Education and Health Services (798 jobs), and the Unclassified (174 jobs) sector all showed increases in employment during the timeframe. Education and Health Services and Public Administration were buoyed in tough economic times by investments in funds from the federal and state government - CARES and ARPA funding.

The Permian Basin Workforce Development Board Plan[1] identifies target occupations that are in demand in one or more industries for which growth in employment is projected over the next five years, these occupations are eligible for Workforce Innovation and Opportunity Act training dollars. The top occupations include Heavy and Tractor Truck Drivers which are projecting a need of 3,830 more drivers, Service Unit Operators, Oil, Gas and Mining will require 1,891 more workers, Roustabouts, Oil and Gas will need 1,574 more workers and General and Operations Managers are projecting a need of 1,262 more workers. As noted in the Workforce Plan, 'the projections were provided by TWC prior to the COVID-19 pandemic. Consequently, the fallout of the virus has not been taken account in the target occupations projections."

[1]https://workforcepb.org/about-us/permian-basin-workforce-plan-2021-2024/

EMPLOYMENT AND UNEMPLOYMENT

Analysis of Civilian Labor Force, Employment, and Unemployment from 2018 to 2021 further articulates the challenges for the region.

The Civilian Labor Force in the region contracted by -21,827 workers from 2018 to 2021. By contrast, the Texas Labor Force increased by 325,125. Such reductions are not uncommon with downturns for the region as much of the workforce for oil and gas production comes from outside the region during boom cycles and returns home during reductions. Similarly, the number of employed individuals dropped by -41,432 from 2018 to 2021. In Texas, employment reduced by -194,306 during that time period - Permian Basin accounted for 21.32% of the total estimated employment loss in the state

The uniqueness of the Permian Basin, seeing reductions in both Labor Force and Employment during the pandemic presents unique downstream challenges in housing, revenue, and wages that local leaders must address.

Table - Labor Force, Employment, and Unemployment Data

	2018			2021			Change
Counties	CLF	Emp	Unemp/ Rate	CLF	Emp	Unemp/ Rate	Emp
Andrews	9,516	9,277	239 (2.5)	8,613	8,077	536 (6.2)	-1,200
Borden	334	324	10 (3)	552	538	14 (2.5)	214
Crane	1,821	1,750	71 (3.9)	1,615	1,458	157 (9.7)	-292
Dawson	4,601	4,391	210 (4.6)	4,510	4,175	335 (7.4)	-216
Ector	86,518	84,108	2,410 (2.8)	78,405	71,588	6,817 (8.7)	-12,520
Gaines	9,423	9,163	260 (2.8	9,346	8,899	447 (4.8)	-264
Glasscock	846	826	20 (2.4)	762	733	29 (3.8)	-93
Howard	13,665	13,165	500 (3.7)	12,812	11,904	908 (7.1)	-1,260
Loving	263	259	4 (1.5)	420	416	4 (1)	157
Martin	2,806	2,736	70 (2.5)	2,538	2,408	130 (5.1)	-328
Midland	104,902	102,615	2,287 (2.2)	96,886	91,059	5,827 (6)	-11,556
Pecos	6,436	6,188	248 (3.9	6,117	5,668	449 (7.3)	-520
Reeves	9,412	9,203	209 (2.2)	7,891	7,378	513 (6.5)	-1,825
Terrell	383	371	12 (3.1)	406	391	15 (3.7)	20
Upton	1,591	1,540	51 (3.2)	1,803	1,706	97 (5.4)	166
Ward	6,989	6,811	178 (2.5)	5,578	5,157	421 (7.5)	-1,654
Winkler	4,123	4,006	117 (2.8)	3,548	3,259	289 (8.1)	-747
Permian Basin	263,629	256,733	6,896 (2.6)	241,802	224,814	16,988 (7)	-31,919
Texas	13,867,247	13,295,993	571,254 (4.1)	14,192,398	13,340,757	851,641 (6)	44,764

Source: Texas Workforce Commission Labor Force and Unemployment Statistics (LAUS) Month of July

ESTABLISHMENTS

Table - Establishments by Industry Super Sector

Industry	2019	2020	2021	Change 2019 - 2021
Natural Resources and Mining	2,606	2,632	2,483	-123
Construction	1,204	1,243	1,245	41
Manufacturing	542	560	560	18
Trade, Transportation and Utilities	3,496	3,584	3,558	62
Information	141	139	138	-3
Financial Activities	1,439	1,506	1,495	56
Professional and Business Services	1,812	1,873	1,883	71
Education and Health Services	1,099	1,139	1,126	27
Leisure and Hospitality	1,192	1,250	1,281	89
Other Services	1,104	1,113	1,078	-26
Public Administration	361	373	377	16
Unclassified	75	82	184	109
Total Permian Basin	15,071	15,494	15,408	337

Source: Texas Workforce Commission 2020 and 2021 1st Quarter Census of Employment and Wages (QCEW)

The Permian Basin region shows an overall increase of 337 establishments from 2019 to 2021 despite a notable -4.7% (-123) reduction in the Natural Resources and Mining sector.

Even though COVID-19 pandemic caused shut downs and changes in consumer behavior, the Leisure and Hospitality sector added 89 establishments, an increase of 7.4%. Other significant gains occurred in the Professional and Business Services sector, adding 71 new establishments (+3.9%), and the Trade, Transportation and Utilities sector, adding 62 new establishments (+1.8%).

In addition to the noted reduction in Natural Resources and Mining establishments, the Other Services sector contracted by 26 establishments (-2.3%) and the Information reduced by 3 establishments (-2.1%).

Controlled for the reduction in establishments in the Natural Resources and Mining sector, which was predominately tied to industry consolidation as firms search for efficiencies and decreases in oil and gas prices/demand, the COVID-19 pandemic does not appear to have substantially negatively impacted the number of establishments in the region. Broad increases, in fact, suggest the economy is continuing to grow, despite negative economic pressures and that the Permian Basin is positioned for even and aggressive growth in establishments and economic activity as the national and global economies rebound.

INDUSTRY SECTOR WAGES

Table - Average Weekly Wages

Industry	Average Weekly Wage 2019	Average Weekly Wage 2020	Average Weekly Wage 2021	Increase/ Decrease 2019 - 2021
Natural Resources and Mining	$2,210.00	$2,266.00	$2,503.00	$293
Construction	$1,425.00	$1,429.00	$1,291.00	($134)
Manufacturing	$1,465.00	$1,502.00	$1,391.00	($74.00)
Trade, Transportation and Utilities	$1,222.00	$1,234.00	$1,117.00	($105)
Information	$1,117.00	$1,095.00	$913.00	($204)
Financial Activities	$1,477.00	$1,500.00	$1,410.00	($67)
Professional and Business Services	$1,438.00	$1,495.00	$1,458.00	$20
Education and Health Services	$909.00	$954.00	$970.00	$61
Leisure and Hospitality	$446.00	$447.00	$428.00	($18)
Other Services	$936.00	$955.00	$942.00	$6
Public Administration	$1,090.00	$1,129.00	$1,134.00	$44
Unclassified	$952.00	$906.00	$919.00	($33)
Total Permian Basin	$14,687.00	$14,912.00	$14,476.00	($211)

Source: Texas Workforce Commission 2020 and 2021 1st Quarter Census of Employment and Wages (QCEW)

The overall Average Weekly Wage Data Table for the Permian Basin shows a decrease in weekly wages from 2019 to 2021 of -$211.

While the aggregate decrease was realized in seven of twelve sectors, there was an increase in average weekly wages paid in Natural Resources and Mining ($293), Professional and Business Services ($20), Education and Health Services ($61), Other Services ($6), and Public Administration ($44).

Total wages shown in the following Table, similarly, declined by -$787,965,398) or from 2019 to 2021. The biggest annual loss was the -$376,408,234 realized in the Natural Resources and Mining sector, a loss to be anticipated with the drop in overall employment.

Although total wages for that sector during that timeframe decreased significantly for that sector, the Permian Basin still maintained a strong market share of 17.6% of the total state wages for the sector.

Trade, Transportation and Utilities and Construction, likewise, experienced notable reductions in total wages at -$162,971,528 and -$154,666,851 respectively. Those decreases are to be anticipated

INDUSTRY SECTOR WAGES

Table - Aggregate Industry Wages

Industry	Total Wages 2019	Total Wages 2020	Total Wages 2021	Increase/Decrease in Total Wages 2019 - 2021	Texas Wages 2021	Texas Market Share - Wages
Natural Resources and Mining	$1,689,636,912.00	$1,633,942,288.00	$1,313,228,678.00	($376,408,234)	$7,467,001,105.00	17.58%
Construction	$417,843,341.00	$388,608,564.00	$263,176,490.00	-$154,666,851.00	$12,365,851,450.00	2.12%
Manufacturing	$223,899,898.00	$209,192,202.00	$157,002,787.00	($66,897,111)	$18,755,714,243.00	0.83%
Trade, Transportation and Utilities	$845,827,821.00	$852,201,392.00	$682,856,293.00	($162,971,528)	$37,585,588,705.00	1.81%
Information	$32,778,240.00	$31,462,457.00	$17,573,577.00	($15,204,663)	$6,020,642,860.00	0.29%
Financial Activities	$192,688,766.00	$207,389,352.00	$173,543,676.00	($19,145,090)	$21,935,270,844.00	0.79%
Professional and Business Services	$318,105,910.00	$343,836,136.00	$300,060,030.00	($18,045,880)	$39,355,605,875.00	0.76%
Education and Health Services	$447,604,285.00	$484,442,140.00	$487,435,278.00	$39,830,993	$37,369,327,248.00	1.30%
Leisure and Hospitality	$140,526,398.00	$144,122,541.00	$125,599,361.00	($14,927,037)	$6,840,737,132.00	1.83%
Other Services	$87,456,887.00	$88,179,178.00	$76,357,468.00	($11,099,419)	$3,428,074,209.00	2.22%
Public Administration	$99,679,211.00	$109,631,083.00	$109,217,203.00	$9,537,992	$7,608,731,244.00	1.43%
Unclassified	$1,312,407.00	$710,329.00	$3,343,837.00	$2,031,430	$128,307,974.00	2.60%
Total Permian Basin	$4,497,360,076.00	$4,493,717,662.00	$3,709,394,678.00	($787,965,398)	$198,860,852,889.00	

Source: Texas Workforce Commission 2020 and 2021 1st Quarter Census of Employment and Wages (QCEW)

AGRICULTURE AND LIVESTOCK

The Permian Basin region provides an abundance of land and resources for agriculture and livestock production. According to the US Department of Agriculture, there were 5,378 farms covering 12,290,844 acres in 2017. In total, the region produced $481.3 MM in crops and $103,8 MM in livestock, poultry, and other animal products in 2017.

- Borden County (1,838) accounts for 34.2% of all farms but only 4.4% of farmland and 0.6% of crops and 27.2% of livestock, poultry, and animal production.
- Pecos County, meanwhile, accounted for the most acreage with 2.9 MM distributed among 309 farms, producing $46.2 MM in crops and $24.4 MM in livestock, poultry, and animal products.
- Reeves County accounted for the second most acreage with 1.1 MM among 224 farms, producing $10.9MM in crops and $5.2 MM in livestock, poultry, and animal products.

In total, 6,006 Permian Basin residents (64.7% male) were employed in agricultural and livestock operations in 2017. Among those, 35.7% were age 65 or older, 56.6% were age 35 to 64, and 7.79 % are less than 35 years of age. New and beginning farmers accounted for 28.5%.

As policy makers and economic developers continue efforts to build a diverse and resilient economy, their efforts must continue to provide incentives and support to agricultural and livestock operations. In addition, intentional efforts to incentivize younger residents to start businesses and pursue employment in the agriculture and livestock production are needed to promote growth. Approximately 43.7% of all producers are 65 and older in the Permian Basin. The aging purveyor population will likely result in contraction in future years without intervention.

AGRICULTURE AND LIVESTOCK

Table - 2017 Agricultural Production

County	Number of Farms	Land in Farm (Acres)	Market Value of Agricultural Total Products Sold ($1,000) Total	Market Value of Crops, including Nursery and Greenhouse Crops ($1,000)	Market Value of Livestock Poultry, and Products ($1,000)	Total Producers
Andrews	156	886,765	$10,615	$5,128	$5,487	256
Borden	1,838	546,768	$31,240	$3,043	$28,197	228
Crane	30	244,095	$1,866	(d)	(d)	49
Dawson	386	535,641	$121,296	$118,397	$2,898	654
Ector	275	557,889	$3,382	$256	$3,126	429
Gaines	507	857,942	$188,793	$177,327	$11,466	877
Glasscock	175	496,214	$50,645	$47,444	$3,201	282
Howard	373	520,963	$26,866	$20,266	$6,600	589
Loving	8	468,140	(d)	(d)	(d)	24
Martin	356	444,558	$54,298	$52,494	$1,804	541
Midland	410	344,988	$16,339	$13,013	$3,326	692
Pecos	309	2,867,712	$46,165	24,371	$21,793	533
Reeves	224	1,063,899	$10,891	$5,175	$5,716	381
Terrell	85	835,111	$4,191	$550	$3,641	131
Upton	98	725,139	$19,063	$13,873	$5,190	158
Ward	102	405,790	(d)	(d)	$1,361	159
Winkler	46	489,230	$3,424	(d)	(d)	98
Permian Basin	5,378	12,290,844	$589,074	$481,337	$103,806	6081
Texas	248,416	127,036,184	$24,924,041	$6,894,307	$18,029,734	408,506
% of Texas	2.16%	9.67%	2.36%	6.98%	0.57%	1.48%

Source:USDA - National Agricultural Statistics Service - 2017 Census of Agriculture Volume 1, Chapter 2: County Level Data

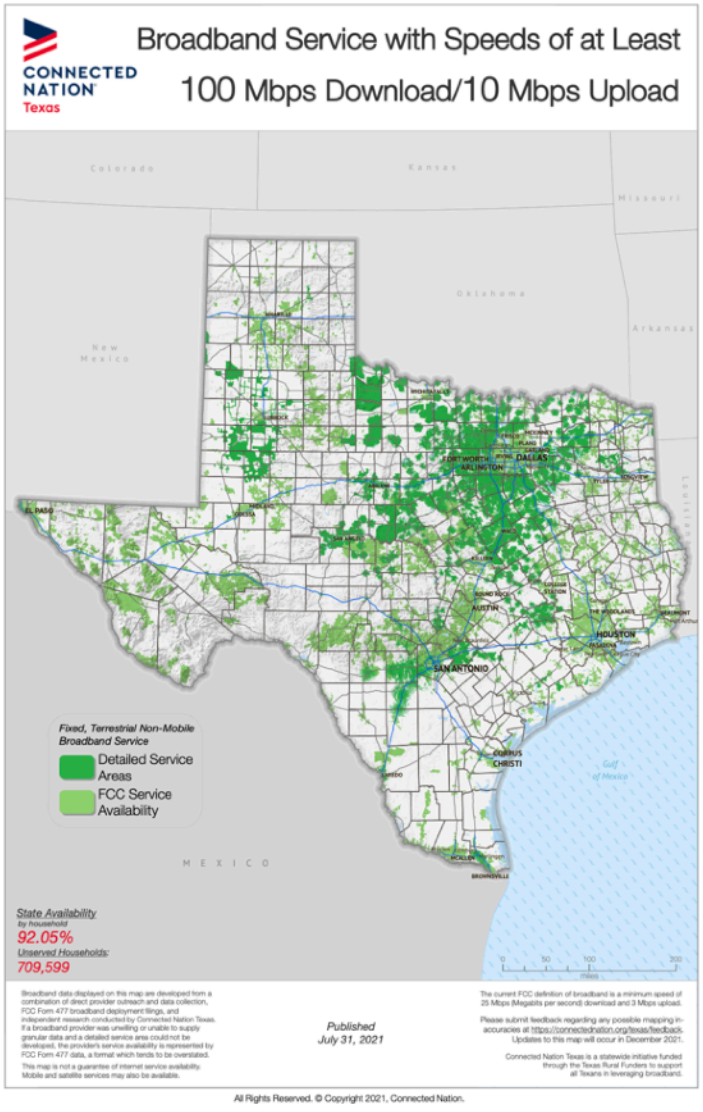
AGRICULTURE AND LIVESTOCK

Table: 2017 Agricultural and Livestock Producer Characteristics

County	Male	Female	Age Less Than 35 Years	Age Between 35-64 Years	Age 65 and Older	Producers with Military Service	New and Beginning Producers
Andrews	158	92	11	174	65	28	90
Borden	137	78	15	121	79	10	53
Crane	32	17	1	31	17	1	13
Dawson	411	233	42	330	272	49	170
Ector	265	164	29	295	105	32	127
Gaines	540	316	73	488	295	56	209
Glasscock	192	90	44	161	77	19	86
Howard	357	225	21	292	269	41	169
Loving	15	5	3	10	7	1	10
Martin	363	178	44	294	203	54	144
Midland	422	266	87	393	208	50	234
Pecos	348	180	22	300	206	71	152
Reeves	260	118	14	201	163	33	113
Terrell	101	29	4	85	41	10	20
Upton	116	41	26	78	53	6	45
Ward	106	53	20	80	59	11	52
Winkler	60	38	5	67	26	6	25
Permian Basin	3883	2123	461	3400	2145	478	1712
Texas	252,273	156,233	24,755	228,842	154,909	50,004	77,419
% of Texas	1.53%	1.35%	1.86%	1.48%	1.38%	0.95%	2.21%

Source:USDA - National Agricultural Statistics Service - 2017 Census of Agriculture Volume 1, Chapter 2: County Level Data

INTERNET CONNECTIVITY



Access to reliable high-speed broadband internet is a critical economic development asset. High-speed broadband allows regional entrepreneurs to compete in the global economy and allows residents to earn increasingly higher incomes in 'work from home' positions as company's change how they hire and manage their workforce. Through entrepreneurship and work from home opportunities, residents generate income/revenue into their communities with non-traditional multiplier effects to economic activity and job creation.

The Permian Basin has made significant strides in providing residents with reliable broadband access throughout the region, however, several communities still struggle with access to high-speed access and barriers to adoption persist. While more than 92% of residents of all counties except Borden (77.9%) and Loving (78.5%) have access to broadband speeds of 10x! Mbps, only nine counties provide more than 80% of residents with access to high-speed broadband speeds of 100x10 Mbps. Stakeholder feedback gathered at public presentations suggests that affordability and access remain issues in rural communities for both business and residential customers. Additionally, even in counties where high-speed broadband is most available, adoption remains a challenge.

In the region's second most populous county Ector County (93.3% at 100 x 10 Mbps), for instance, 33% of households and 47% of households in West and South Odessa do not have broadband access according to the 2020 MOTRAN Annual Report. Additionally, an estimated one-third of all residents in Ector County utilize a mobile device as their only means of accessing high-speed internet.

INTERNET CONNECTIVITY

Table - Percent of Households Served

County	Number of Households	10 x 1 Mbps	25 x 3 Mbps	50 x 5 Mbps	100 x 10 Mbps
Andrews	5,259	99.54%	99.43%	97.67%	96.84%
Borden	264	77.92%	49.29%	49.29%	49.29%
Crane	1,471	98.40%	5.36%	2.19%	1.09%
Dawson	4,385	99.83%	99.02%	89.98%	78.77%
Ector	48,688	99.85%	98.20%	98.15%	93.29%
Gaines	5,606	99.42%	96.92%	82.57%	78.38%
Glasscock	441	92.90%	88.41%	88.41%	82.02%
Howard	11,333	99.55%	91.41%	91.18%	90.79%
Loving	39	78.49%	73.36%	71.79%	71.79%
Martin	1,649	94.08%	90.32%	90.23%	89.95%
Midland	50,845	99.92%	99.81%	98.28%	94.52%
Pecos	4,894	98.61%	83.14%	82.28%	82.22%
Reeves	3,839	98.98%	98.35%	95.88%	93.51%
Terrell	430	99.76%	91.63%	91.63%	91.63%
Upton	1,256	92.04%	13.06%	13.06%	13.06%
Ward	3,995	99.20%	99.02%	59.60%	59.35%
Winkler	2,578	99.46%	47.44%	45.00%	45.00%

Source: Connected Nation, https://connectednation.org/texas/

The 2020 MOTRAN Annual Report also highlights the importance of broadband access to how residents shop and work. Residents averaged online purchases of $1,350 with local businesses and $2,900 with non-local businesses annually

Further, Ector County residents surveyed about their work from home status reported:

- 50% Work from Home on Some Level
- 34% Report Daily
- 62% Report Once a Week or More

A 2018 Pew Research Center Report[1] articulates well both the infrastructure and adoption challenges facing rural policymakers. “Rural Americans have made large gains in adopting digital technology over the past decade and have narrowed some digital gaps. However, rural adults remain less likely than suburban adults to have home broadband and less likely than urban adults to own a smartphone, tablet computer or traditional computer.” In addition, the study states “adults who lived in rural areas were more likely to say access to high-speed internet was a major problem in their local community: 24% said this, compared with 13% of urban adults and 9% of suburban adults,” a result consistent between high and low-income households.

[1] https://www.pewresearch.org/fact-tank/2021/08/19/some-digital-divides-persist-between-rural-urban-and-suburban-america/

INTERNET CONNECTIVITY

Table - Households with Computers

County	Households with a Computer Percent 2015 - 2019	Households with a Broadband Internet Subscription Percent 2015 - 2019
Andrews	91.60%	86.20%
Borden	90.70%	79.70%
Crane	93.20%	66.20%
Dawson	81.50%	68.80%
Ector	89.60%	82.20%
Gaines	83.60%	76.90%
Glasscock	91.10%	73.20%
Howard	88.60%	73.60%
Loving	93.30%	73.30%
Martin	84.00%	62.90%
Midland	92.60%	84.10%
Pecos	80.00%	63.30%
Reeves	79.40%	61.80%
Terrell	73.90%	58.40%
Upton	77.90%	49.80%
Ward	84.90%	71.80%
Winkler	83.00%	73.30%
Texas	91.00%	81.90%

Source: Economic US Census Bureau

The results from our 2021 CEDS of regional stakeholders support the findings from the MOTRAN and Pew Research Center Reports. Among 32 survey respondents, 53.1% indicated telework and 67.7% indicated distance learning increased significantly, while 17.9% of 25 respondents, indicated broadband was not available in their community and 34.4% of disagreed that sufficient broadband was available to allow remote work and school options.

To continue to facilitate commerce, promote entrepreneurship, and provide access to work from home opportunities for its residents, regional policymakers, economic developers, and stakeholders must continue to (1) improve broadband access by ensuring sufficient infrastructure exists as well as invest in efforts to (2) improve affordability in rural communities for both business and residential use and (3) engaging in proactive campaigns and efforts to encourage adoption among all residents.

HEALTH FACTORS

The Permian Basin region's composition of a single large Midland-Odessa community surrounded by a number of dispersed rural communities presents a significant challenge for local health officials and policy makers to ensure residents have ready access to needed medical care. According to the University of Wisconsin Population Health Institute and Robert Wood Johnson Foundation (2017 study), all 17 Permian Basin counties have a Primary Care Physician to Patient ratio higher than the state of Texas. Four counties reported no presence of Primary Care Physicians.

In addition, numerous reported behavioral and physical health factors present health challenges for the region. Although factors vary county to county, evaluation of characteristics outlined in the Behavioral and Physical Health Factors Table indicate:

- 7 of 17 counties have an Adult Obesity index greater than Texas
- 16 of 17 counties report Adult Smoking above the state average
- 12 of 17 report a Physical Inactivity rate that exceeds the state
- 5 of 17 counties have an Excessive Drinking rate higher than Texas
- 3 of 17 counties have a Long Commute/Driving Alone percent higher than the state of Texas

None of the 17 counties have an Air Pollution ratio or Severe Housing Problems percentage higher than the state Texas.

HEALTH FACTORS

Table: Behavioral and Physical Health Factors (2017)

County and Texas	Adult Smoking	Adult Obesity	Physical Inactivity	Excessive Drinking	Primary Care Physicians	Air Pollution Particulate Matter	Severe Housing Problems	Long Commute Driving Alone
Andrews	17%	31%	27%	20%	2010 to 1	6.3	14%	31%
Borden	14%	24%	23%	23%	650 to 0	6	4%	62%
Crane	16%	20%	18%	19%	4,790 to 1	6.2	14%	47%
Dawson	22%	28%	24%	17%	2,520 to 1	6.1	11%	20%
Ector	17%	37%	32%	19%	1,720 to 1	6.6	16%	26%
Gaines	21%	35%	27%	18%	5,230 to 1	6.3	11%	21%
Glasscock	18%	26%	19%	20%	1,390 to 0	6.1	8%	42%
Howard	19%	36%	30%	19%	3,650 to 1	6.3	14%	18%
Loving	20%	30%	24%	21%	150 to 0	6	0%	26%
Martin	18%	31%	18%	19%	5,770 to 1	6.3	17%	34%
Midland	15%	35%	24%	20%	2,780 to 1	6.6	16%	20%
Pecos	18%	39%	27%	18%	2,240 to 1	6.2	10%	16%
Reeves	18%	29%	25%	19%	3,140 to 1	6.1	13%	20%
Terrell	18%	20%	24%	18%	820 to 0	6.3	4%	28%
Upton	19%	24%	20%	18%	1,840 to 1	6.3	10%	37%
Ward	18%	38%	28%	18%	5,860 to 1	6.3	13%	26%
Winkler	19%	38%	22%	19%	3,860 to 1	6.2	17%	26%
Texas	14%	31%	23%	19%	1,640 to 1	7.3	17%	39%

Source: University of Wisconsin Population Health Institute and Robert Wood Johnson Foundation

HEALTH FACTORS

In addition to the challenges presented by behavioral and health factors, Permian Basin reports to have 4 counties with disabled populations under 65 higher than the 7.9% Texas average. There are also 8 counties with a higher percentage of residents under age 65 without health insurance than the 20.8% average for the state. Gains County has the highest percentage of uninsured at 35.8%

Leaders and stakeholders throughout the region have taken significant steps to address several of the challenges highlighted by the data. Noteworthy developments, including:

- Midland Development Corporation's continued support to Midland Memorial Hospital for Physician recruitment ($2MM from 2014 to 2019).1
- Midland Development Corporation's contributing $8.4MM over 8 years to the Texas Tech University Health Science Center to fund a fellowship to provide much child and adolescent psychiatry care (2018).2

Community leaders must continue to make needed investments to improve the health of communities to allow the region's workforce and economies through thrive.

Table: Health Characteristics by County (2018)

County	Disability under age 65 percent 2015 - 2019	Without Health Insurance under age 65 2015 - 2019
Andrews	6.90%	20.90%
Borden	14.60%	12.30%
Crane	4.00%	20.40%
Dawson	15.80%	23.20%
Ector	7.70%	22.00%
Gaines	7.70%	35.80%
Glasscock	1.10%	19.10%
Howard	11.70%	19.10%
Loving	16.40%	11.40%
Martin	5.80%	20.40%
Midland	6.40%	18.40%
Pecos	6.30%	24.80%
Reeves	6.30%	22.20%
Terrell	6.30%	19.50%
Upton	5.00%	20.50%
Ward	7.10%	21.20%
Winkler	6.70%	21.00%
Texas	7.90%	20.80%

Source: Economic US Census Bureau

1 https://www.midlandtxedc.com/featured-partnerships/p/item/173/midland-memorial-hospital-physician-recruitment-program
2 https://highground.org/news/article/midland-development-corporation-commits-8.4-million-to-texas-tech-university-health-sciences-center

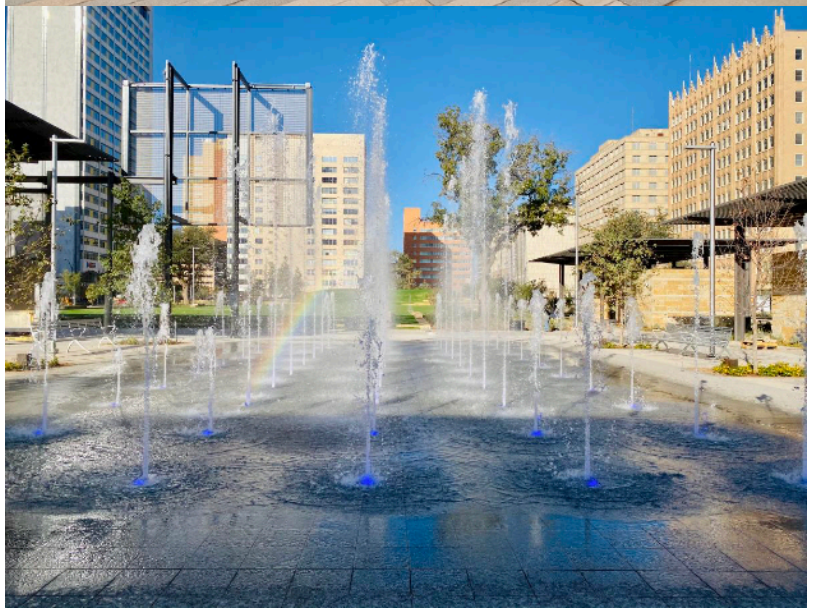
QUALITY OF PLACE

The Permian Basin is a region replete with communities with strong local identities and unique histories, cultures, amenities, and resources. If cultivated, these communities boast a unique asset - a quality of place that can both retain current residents and attract others to relocated businesses and residences to their communities.

In the Permian Basin, communities have by and large have accepted that charge. From large metros like Midland and Odessa to small municipalities like Lamesa, communities are striving to create a compelling and unique brand the capitalizes on local assets, makes their individual community stand out as unique, and improves the lives of residents. Amenities like Centennial Park in Midland, Balmorehea State Park in Toyahvale, Ward County Convention Center, and the Horseshoe Arena are well utilized by area residents and important to the identity of Permian Basin communities.

Below is a sample of some of the many of the initiatives and projects, recent, planned, and underway that promise to enhance the lives of citizens within the Permian Basin region.

- The City of Pecos held a groundbreaking in January 2020 for the first new grocery store in the community in 50 years. Grocery store accessibility is a key basic amenity for residents of any community. https://pecosedc.com/news/united-holds-indoor-groundbreaking-store
- Keep Midland partnered with Midland TreeKeepers, a recipient of the Apache Tree Grant Program donating more than 64,000 trees, to host a spring tree planting seminar for citizens. https://www.keepmidlandbeautiful.org



QUALITY OF PLACE

- Chevron donated $40,000 to the Boys & Girls Clubs of the Permian Basin in April 2020 to support programs aimed at providing food for families, children, and older individuals, as well as ways to bring Boys & Girls Club programming to youth. Fostering strong corporate citizenship is key to assisting policymakers and economic developers in improving their communities. https://odessatex.com/good-news-chevron-donates-40000-boys-girls-clubs/

Results from the 2021 CEDS Survey of community stakeholders, however, indicate continued focus and attention is needed to enhance quality of place. Among 28 respondents to a survey question asking whether the following amenities were available in their community, 'no' responses were received by 53.6% for bicycle paths, 57.1% for outdoor art exhibits, 39.3% for hiking/walking trails, 39.3% for performing arts venues, and 28.6% for movie theaters.

While given the community composition of the Permian Basin, these responses will not apply to all communities, leaders across the region must continue to survey their citizenry and anticipate the need for future development to improve their community identity and quality of place in order to retain and attract new residents.

ECONOMIC RESILIENCY

A primary goal of the PBRPC and its partners is to plan for a resilient region that anticipates threats and economic risk, develops resources to reduce their impact, responds appropriately, and ultimately leads the region to recovery. The need for a focus on economic resiliency has been underscored by the the events of the past 2 years, which includes the COVID-19 pandemic and a significant reduction in oil and gas prices, both of which had tremendous deleterious economic effects. In their April 2020 report The Economic Outlook for Texas and the Permian Basin: Projected Recession and Recovery from COVID-19, the Perryman Group articulated the challenge well citing ""the negative effects of COVID-19 have been compounded by turmoil in energy markets, with a price war between Saudi Arabia and Russia causing an increase in supply even as demand dwindled with COVID-19 disruptions. Although recent agreements have reduced global oil production, the market remains oversupplied and prices have fallen dramatically."

PBRPC and our partners must continue to extend beyond emergency responsiveness and shift further toward intentional economic development that focuses on diversification and structural changes to the economy to reduce the risks associated with negative economic events. PBRPC and its stakeholders must continue continue their history of strong coordination and collaboration to build a more resilient regional economy, utilizing economic data and stakeholder feedback 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:

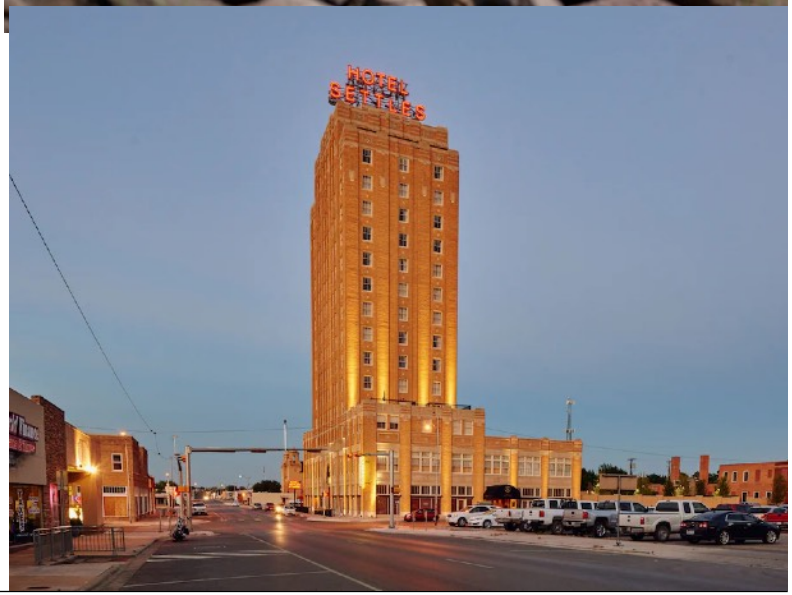
1. Economic diversification: Economic diversification measures the degree to which economic activity is spread across sectors of an economy. When economic activity is concentrated in relatively few sectors, the overall regional economy is more vulnerable.
2. Business climate: Continuously improving the business climate throughout the region through economic development policy and incentives improves access to jobs in communities throughout the region.
3. Entrepreneurship and small business development: Strong support of entrepreneurship and small business development capitalizes on the region's human capital and leverages demographic diversity.
4. Improve Digital Infrastructure: Improved broadband coverage and creation of programs to improve household access to computer equipment will improve access to distance education and remote work opportunities.

ECONOMIC RESILIENCY

5. Strengthening Community Identities: Revitalizing downtowns creates anchors for development and develops a sense of place and destination for communities.
6. Regional affordability of housing: Improving housing affordability, comparing the cost of housing to the level of income, is critical to ensure local business has ready access to a sufficient workforce and residents can afford to reside in Permian Basin communities.
7. Income equality: Measures and policies that lessen income inequality and linking assets throughout the region improves economic security and aggregate disposable income, and can spur economic growth and resiliency.

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

As the Perryman Group stated, “the long-term outlook remains positive for Texas and the Permian Basin” as the “economy was sound going into the COVID-19 pandemic and should be able to emerge and recover in a reasonable period of time.”



SWOT

At its December 2021 Meeting, the CEDS Committee reviewed in detail the data collected in preparation of the PBRPC CEDs. At the meeting the Committee was also provided a summary of regional economical development plans from partner agencies and economic development organizations from communities throughout the Permian Basin Texas region, many of which Committee members represent. Committee members then participated in a strategic work session, conducting a SWOT analysis and developing a Plan of Action with Strategic Recommendations. The Committee provided additional feedback via individual interviews and regional videoconference planning sessions following the November meeting.

The resultant SWOT Analysis is presented below.

SWOT

STRENGTHS

- Regional Oil and Gas Competency
- Oil and Gas Production Potential
- Natural Resources - Industrial Water Supply, Mining (frac-sand)
- Emergent Alternative Energy Production Competency and abundance of Resources
- Private Sector Collaboration Among Oil and Gas Industry (i.e., Permian Strategic Partnership)
- Potential Production - Horizontal Drilling Techniques
- Midland International Air and Space Port / Differentiation
- Numerous Intermodal Business Parks
- Logistics: Location on IH-20 and IH-10 / Mature State Hwy System
- Accessibility of Rail Service
- Private Sector Investments in Rail Service
- CREZ Transmission Capacity
- Availability of Land
- Innovation and Commercialization Potential / Private and Public Sector Expertise
- Small Business Administration and Entrepreneurship Assets
- Emerging Biomedical and Life Sciences Competency / Health Science Center
- Post Secondary Education Infrastructure
- Regional Marketing Plan - Higher Ground of Texas (https://highground.org)
- Regional Transportation Advocates / MOTRAN (http://motran.org), Ports to Plains (https://portstoplains.com), etc.
- Strong Collaboration / Communities, EDCs, Workforce Solutions, Education, etc.
- Stable Weather

SWOT

WEAKNESSES

- Low Unemployment / Little Slack in Labor Force
- Strong Competition for Oil and Gas Production Skill Set (competitive with other target industry clusters, i.e. manufacturing, transportation/logistics, and agribusiness)
- Available Skilled Workforce
- Lower Relative Educational Attainment of the population
- Skilled Trade Labor in Rural Areas (i.e., electricians, plumbers, etc.)
- Teacher Availability, Including Bi-Lingual
- Physician and Skilled Workforce Availability (MDC Physician Recruitment and Physician Assistant Program)
- Transportation Infrastructure between Communities not Adequate (support workforce mobility)
- Availability of Broadband service options in Rural Areas (mobility of workforce and participation in remote work and distance learning opportunities)
- Attractiveness of "Quality of Life" to Younger Generation
- Availability of Affordable Housing
- Availability of Multi-Family Housing
- Deterioration of State, County, and Local Roads - Heavy Truck Traffic
- Utility Infrastructure for Expansion – Rural Communities
- Capacity to Monitor/Enforce Environmental Regulations (primarily rural communities)
- Rural Areas Lose Industry and Workforce to Midland/Odessa
- Competitiveness between Communities for Economic Developments
- Lack of Funds to Support Dedicated Economic/Community Development (rural) – CARES/ARPA Funds (temporary)

SWOT

OPPORTUNITIES

- Leveraging Strong Transportation/Logistics Capacity for Diversification
- Secondary/Post-Secondary Education Collaboration to Promote Early Skill Attainment and Credentialing (i.e., dual credit, articulation, stackable credentials, etc.)
- Business Attraction, Expansion, and Retention - diversification of Economic Base (critical to resiliency efforts)
- Strengthen Business Recruitment Strategies
- Strengthening of Entrepreneurship Assets (low barriers to global competition)
- Strengthen Out of Region Recruitment
- Enhanced Alternative Energy Production
- Organized Effort to Promote R&D Competency
- Development of Commercial Space Cluster (unique asset in space port designation)
- Addition of "Quality of Life" Assets
- Enhanced Public Transportation Alternatives
- Educate Federal and State Government Agencies about the Impact of Permian Basin Economic Activity (tax revenue) and the Region's Needs
- Promote and Develop Tourism to the Region
- Enhanced Coordination of Region Economic Development Planning

SWOT

THREATS

- Global economic slowdown – COVID-19 (emphasized need for resiliency initiatives)
- Volatility in Oil and Gas Prices (supply and demand changes)
- Changes to Immigration Policy / National (H1B Visas)
- Regulatory Changes / Energy Production
- Competition with Other Regions for Skilled Workforce
- Funding Allocations to Permian Basin Region from State/Federal Agencies
- Growth Outpacing Infrastructure Development
- Economic Contraction Resulting in Infrastructure Abundance (i.e., vacancy rates - hotels and rental properties)
- Deterioration of City/County Buildings
- Lack of Housing Constrains Economic Development (lack of large national housing builders in Permian Basin)
- Availability of Water Resources

GOALS, OBJECTIVES, STRATEGIES, AND PERFORMANCE MEASURES

The Permian Basin region is diverse and expansive, comprised of numerous urban and rural communities across its 17 counties. In conducting the SWOT analysis and developing subsequent Goals, Objectives, Strategies, and Performance Measures for the CEDS, the CEDS Committee was mindful of the need to represent and consider the interests of all communities throughout the region - understanding the importance of Midland/Odessa, but using the planning exercise to think broadly as a region.

During the SWOT Analysis, the Committee identified traditional strengths and competencies for the region including regional oil and gas production competency; logistics and warehousing infrastructure; abundance of land; rail infrastructure; the Midland International Air and Space Port and a strong regional network of airports; intermodal parks and rail infrastructure; and the region's position along key trade routes. The Permian Basin also continues to experience development of alternative energies including wind energy and solar energy. The adaptation of the oil and gas industry sector is evident in the use of the technologies offered by wind and solar in daily operations. In addition, progress has been made to address environmental concerns, including oilfield water reclamation and recycling business operations and partnerships between municipalities and oil industry.

A strong collaborative environment promises to continue to build on these regional strengths and competencies. The Permian Strategic Partnership is a collaboration between oil and gas producers in the region, joined with local communities to determine regional and local investments to secure the economic stability of the region. Areas that have advanced because of the PSP include education, healthcare, housing, workforce development, infrastructure.

Discussion on opportunities focused on leveraging the Permian Basin's strong competencies to diversify the region's economy; better utilizing strong post-secondary infrastructure to improve the educational attainment levels; enhanced business attraction, retention, and development efforts; and improved coordination of economic development efforts. Discussion also highlighted the opportunity to generate more regional entrepreneurship activity by enhancing the assets throughout the region such as incubators, maker-spaces, and shared work spaces. Opportunities to improve quality of place or quality of life assets was also identified as key a key opportunity for building stronger communities and a more stable workforce..

Utilizing the results of the SWOT Analysis as well as feedback provided by local stakeholders via individual interviews and survey results, RPC CEDS Committee has adopted the following Goals, Objectives, Strategies and Performance measures.

GOALS, OBJECTIVES, STRATEGIES, AND PERFORMANCE MEASURES

Goal 1: Industry Diversification & Resiliency, work as a region united to attract and expand industry throughout the Permian Basin.

Objectives:

1. Enhanced diversity of industry sector employment
2. Increased diversification of industry sector establishments

Strategies/Key Actions:

1. Assist communities implementing economic development strategies that grow/attract businesses in targeted industry clusters
2. Assist small communities in developing micro-clusters that capitalize on their unique community assets and provide a competitive advantage
3. Promote initiatives that foster growth in export industries that generate wealth for the region
4. Promote development of knowledge based economic clusters

Note: The PBRPC's Regional Homeland Security Strategic Implementation Plan includes strategies for mutual aid and regional support by local, state and federal agencies to address potential disasters, including those threatening interruptions to the local infrastructure systems and the economic development activities and businesses. The PBRPC EDD program participates in completing a Threat & Hazard Identification and Risk Assessment to identify a natural, technological or human caused disaster, along with risk management and the desired outcomes and impacts necessary for optimal operational coordination. The EDA program is identified as a participant and leader in the incident management activities in the event of a disaster. It provides necessary input to assess the core capabilities necessary for continuity of operations, as well as the impacts of disasters related to economic loss and business interruption.

GOALS, OBJECTIVES, STRATEGIES, AND PERFORMANCE MEASURES

Goal 1 *(Continued)***:** Industry Diversification & Resiliency, work as a region united to attract and expand industry and entrepreneurship throughout the Permian Basin.

Performance Measures:

1. Industry sector employment
2. Industry sector establishments
3. Regional wages by industry sector

GOALS, OBJECTIVES, STRATEGIES, AND PERFORMANCE MEASURES

Goal 2: Develop the capacity of the region as a hub of innovation and entrepreneurship.

Objectives:

1. Promote entrepreneurship throughout the region
2. Increase business startup activity
3. Promote business development that generates revenue from outside the region

Strategies/Key Actions:

1. Support development of entrepreneurship training programs in secondary and post-secondary training institutions
2. Promote development of business incubators and shared work spaces in communities throughout the region
3. Support enhancements to broadband capacity in regions throughout Permian Basin and support initiatives aimed at improving use and affordability

Performance Measures:

1. New establishments
2. Business incubator capacity
3. Broadband capacity

GOALS, OBJECTIVES, STRATEGIES, AND PERFORMANCE MEASURES

Goal 3: Education and Workforce Development. Ensure that the Permian Basin offers employers a qualified workforce well prepared to meet the needs of existing and future industry within the region.

Objectives:

1. Increase the percentage of the population achieving a high-school diploma or equivalent
2. Increase the percentage of the population with post-secondary degrees
3. Increase the capacity of local post-secondary institutions
4. Support development of programs that promote entrepreneurial skills in the workforce

Strategies/Key Actions:

1. Coordinate with regional education agencies to better align curricula to meet employer needs
2. Strengthen partnership with Workforce Solutions for Permian Basin to ensure the region's workforce development resources align with and support regional economic development initiatives
3. *Support development of programs that promote entrepreneurial skills in the workforce*
4. Promote efforts to effectively highlight the skilled human capital in the region to recruit, grow, and retain regional businesses

Performance Measures

1. HS dropout rate
2. Educational attainment, age 25+
3. Number of post-secondary program completions in the region
4. Programs completed/credentials earned (by type)

GOALS, OBJECTIVES, STRATEGIES, AND PERFORMANCE MEASURES

Goal 4: Promote comprehensive planning solutions to ensure the Permian Basin transportation infrastructure meets the needs of employers and citizens.

Objectives:

1. Improve the mobility of the Permian Basin workforce
2. Maintain/Improve the region's competitive advantage in transportation/logistics and natural resource/mining

Strategies/Key Actions:

1. Support and connect communities with state and federal funding agencies
2. Promote development of public transportation alternatives
3. Support public transportation usage campaigns to promote connectivity between communities throughout the region
4. Assist communities in accessing resources to improve roadways, rail systems, and airport capacity
5. Promote effective transportation planning through coordination with regional agencies including Permian Basin MPO, MOTOR Metropolitan Organization and the PBRPC Rural Transportation Board. Efforts will include identifying funding opportunities as well as reviewing and provide feedback for the region for TXDOT plans and projects.

Performance Measures:

1. Freight moved via roadways
2. Freight moved via rail
3. Public transportation options/utilization

GOALS, OBJECTIVES, STRATEGIES, AND PERFORMANCE MEASURES

Goal 5: Support the expansion of housing options throughout the Permian Basin Region.

Objectives:

1. Increase affordable housing options
2. Increase multi-family housing availability
3. Improve home ownership

Strategies/Key Actions:

1. Encourage development of sufficient affordable housing within the region
2. Promote multi-family developments
3. Encourage communities to utilize revitalization and beautification programs to improve existing housing stock
4. Support regional communities in planning infrastructure improvements needed for new residential development

Performance Measures:

1. Housing stock (including multi-family units)
2. Home ownership percentage
3. Building permits

GOALS, OBJECTIVES, STRATEGIES, AND PERFORMANCE MEASURES

Goal 6: Improve perception of the Permian Basin as a great place to work and live.

Objectives:

1. Improve quality of place assets in communities throughout the region
2. Improve perception of quality of place among residents
3. Increase access to healthcare among rural residents

Strategies/Key Actions:

1. Assist the PBRPC region's communities in implementing economic development strategies that capitalize on their unique characteristics and economic opportunity
2. Identify unique industries that can be replicated throughout the region
3. Coordinate marketing opportunities within the region to highlight each community's assets
4. Promote increased utilization of telemedicine and support/expansion of rural healthcare centers

Performance Measures:

1. Quality of place focused economic developments
2. Physician to population ratio

PBRPC EDD ROLE AND PLAN OF ACTION

The PBRPC Economic Development District (EDD) will continue to leverage resources and align interdependent planning and development components including economic development, workforce development, transportation, environmental-air quality, housing, and more.

PBRPC EDD, 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. Publish annual report summarizing the Permian Basin region's progress toward meeting goals and objectives outlined in CEDS
2. Provide regional municipalities and economic development partners with learning and networking opportunities
3. Assist regional municipalities and economic development partners in applying for Economic Development Administration (EDA) and other Federal/State agency funds to support CEDS goals and objectives
4. Promote collaboration and coordination among economic development stakeholders by facilitating relationships and bringing together key players with common interests.

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

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Permain Basin Regional Planning Commission (PBRPC)

The Permian Basin Regional Planning Commission was founded for purposes of solving area-wide problems through promoting intergovernmental cooperation and coordination, conducting comprehensive regional planning, and providing a forum for the study and resolution of area-wide problems.

Through PBRPC, individual governments may combine their resources and talents to meet challenges beyond their individual capabilities. By fostering intergovernmental cooperation and coordination and by carrying on regional planning, PBRPC both compliments and supplements government without infringing on local home rule.

PBRPC