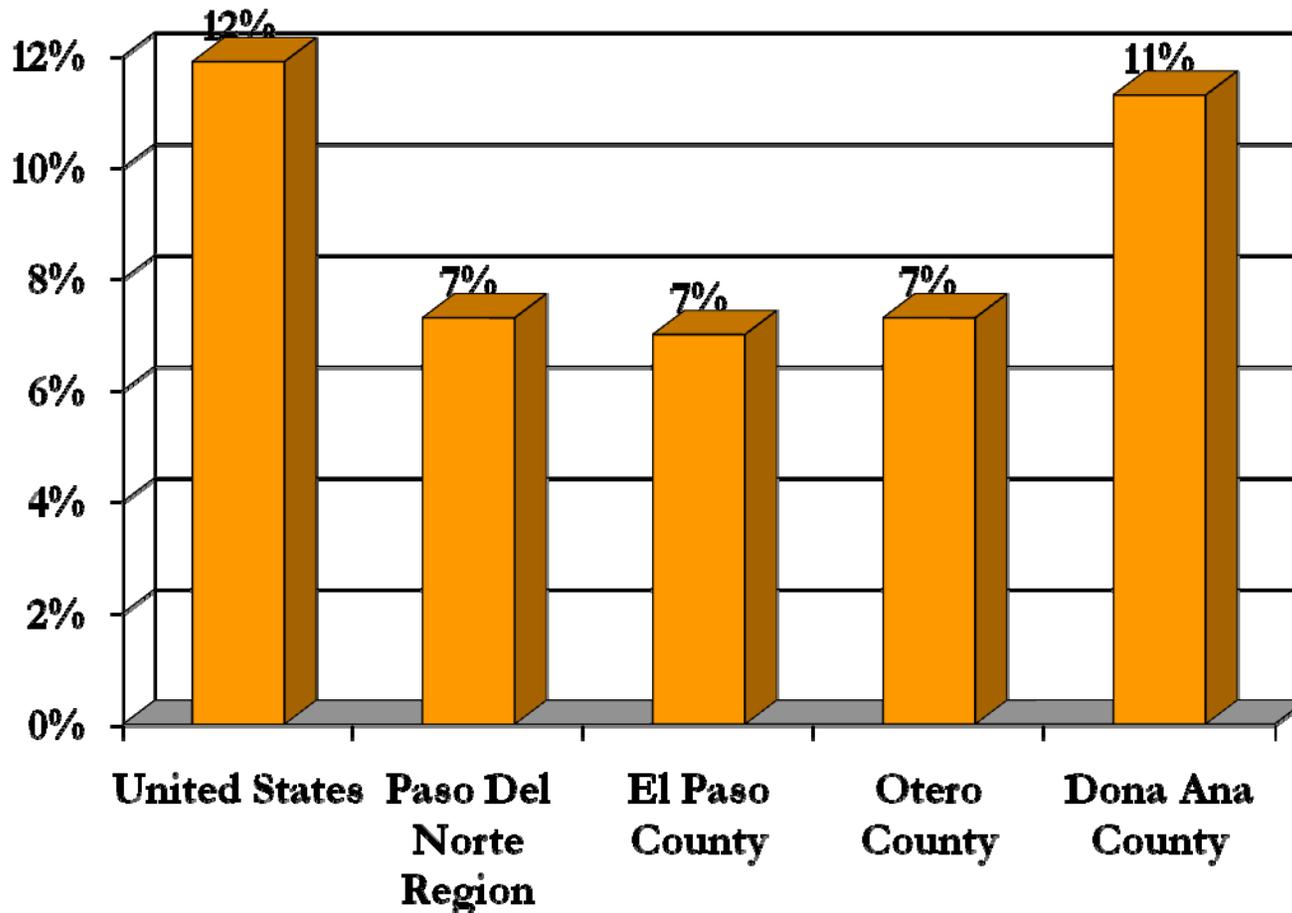


## Change in Median Home Values (2007 to 2012)

With the exception of Dona Ana County, the Paso del Norte region is projected to have approximately 25 percent lower appreciation in median home values over the next five years than is projected for the US average increase in appreciation.



## Distribution of Number of Homes by Value (2007)

The following table shows the number and proportion of homes by value for the Paso del Norte region and the counties that comprise the region. Eighty-eight percent of the homes in El Paso County have values less than \$150,000 and 81 percent of the homes in Dona Ana and Otero Counties have values less than \$150,000.

Distribution of Number of Homes by Value Total Owner Occupied Units (2007)								
Value of Homes	Number and Percent of Homes							
	Paso del Norte Region		El Paso County		Dona Ana County		Otero County	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Total units	212,518		149,729		46,650		16,139	
Less than \$100,000	133,102	62.6%	101,671	67.9%	21,927	47.0%	9,504	58.9%
\$100,000 to \$149,999	45,416	21.4%	30,284	20.2%	11,337	24.3%	3,795	23.5%
\$150,000 to \$199,999	15,908	7.5%	9,034	6.0%	5,476	11.7%	1,398	8.7%
\$200,000 to \$299,999	11,679	5.5%	5,649	3.8%	5,062	10.9%	968	6.0%
\$300,000 to \$399,999	3,401	1.6%	1,634	1.1%	1,477	3.2%	290	1.8%
\$400,000 to \$499,999	1,414	0.7%	711	0.5%	658	1.4%	45	0.3%
\$500,000 to \$749,999	1,075	0.5%	480	0.3%	541	1.2%	54	0.3%
\$750,000 to \$999,999	338	0.2%	202	0.1%	102	0.2%	34	0.2%
\$1,000,000+	185	0.1%	64	0.0%	70	0.2%	51	0.3%

## Building Permits

Unlike most of the US, the number and average cost of single-family building permits issued annually has increased significantly from 2000 to 2005, approximately an 11 percent decline in the number of permits issued in 2006. Dona Ana County while not issuing as many permits as El Paso County has higher average costs per home. El Paso has a lower average unit cost but has shown the largest increase in home costs, while those in Dona Ana County have declined by about \$18,000 per home between 2004 and 2006.

Residential Building Permits by Year						
Year	Market Area					
	El Paso County		Dona Ana County		Otero County	
	Number	Average Cost	Number	Average Cost	Number	Average Cost
2000	2,413	\$53,497	730	\$117,668	Unavailable	
2001	3,124	\$54,900	744	\$124,826	Unavailable	
2002	721	\$53,392	866	\$151,212	Unavailable	
2003	4,829	\$59,822	1,231	\$164,059	Unavailable	
2004	3,404	\$82,162	1,230	\$192,612	Unavailable	
2005	3,918	\$109,976	2,139	\$179,923	Unavailable	
2006	3,467	\$124,435	2,049	\$174,173	Unavailable	

## Home Sales by Value

Based on home sales data from Melissadata.com the largest proportion of homes sold during the year ending November 6, 2007 were valued less than \$150,000. Dona Ana County has the greatest percentage of homes (29 percent) priced at or above \$200,000. Two-thirds of the homes in El Paso County, 43 percent in Dona Ana County and all of the homes in Otero County sold for less than \$150,000 in 2007.

Home Sales by Value for Year Ending 11/6/2007						
Home Value	El Paso County, Texas		Dona Ana County, New Mexico		Otero County, New Mexico	
	Number	Percent	Number	Percent	Number	Percent
0- \$100,000	2,501	32.6%	461	14.6%	3	60.0%
\$100,000 - \$150,000	2,660	34.6%	916	28.9%	2	40.0%
\$150,000 - \$200,000	1,408	18.3%	858	27.1%	0	0.0%
\$200,000 - \$300,000	777	10.1%	578	18.2%	0	0.0%
\$300,000 - \$400,000	235	3.1%	184	5.8%	0	0.0%
\$400,000 - \$500,000	56	0.7%	91	2.9%	0	0.0%
\$500,000+	44	0.6%	80	2.5%	0	0.0%
Total	7,681		3,168		5	

Source: Melissadata.com

## Migration Comparisons by Location of In Migration

Migration trends for El Paso County reveal that it has a higher proportion of migration from another country than the other southwestern counties. Brownsville, Laredo and Santa Fe are in counties that also border Mexico, but they do not reflect the same level of migration.

County	State	Largest City in County	Net Migration	Percent of <b>In</b> Migration From:		
				Same State	Different State	Foreign
El Paso	Texas	El Paso	520	20%	68%	12%
Bexar		San Antonio	7,002	46%	50%	4%
Webb		Laredo	-9	56%	37%	7%
Cameron		Brownsville	-217	52%	44%	4%
Maricopa	Arizona	Phoenix	24,803	13%	85%	2%
Pima		Tucson	4,469	22%	74%	4%
Bernalillo	New Mexico	Albuquerque	2,108	37%	60%	3%
Dona Ana		Las Cruces	664	26%	70%	4%
Santa Fe		Santa Fe	73	33%	65%	2%

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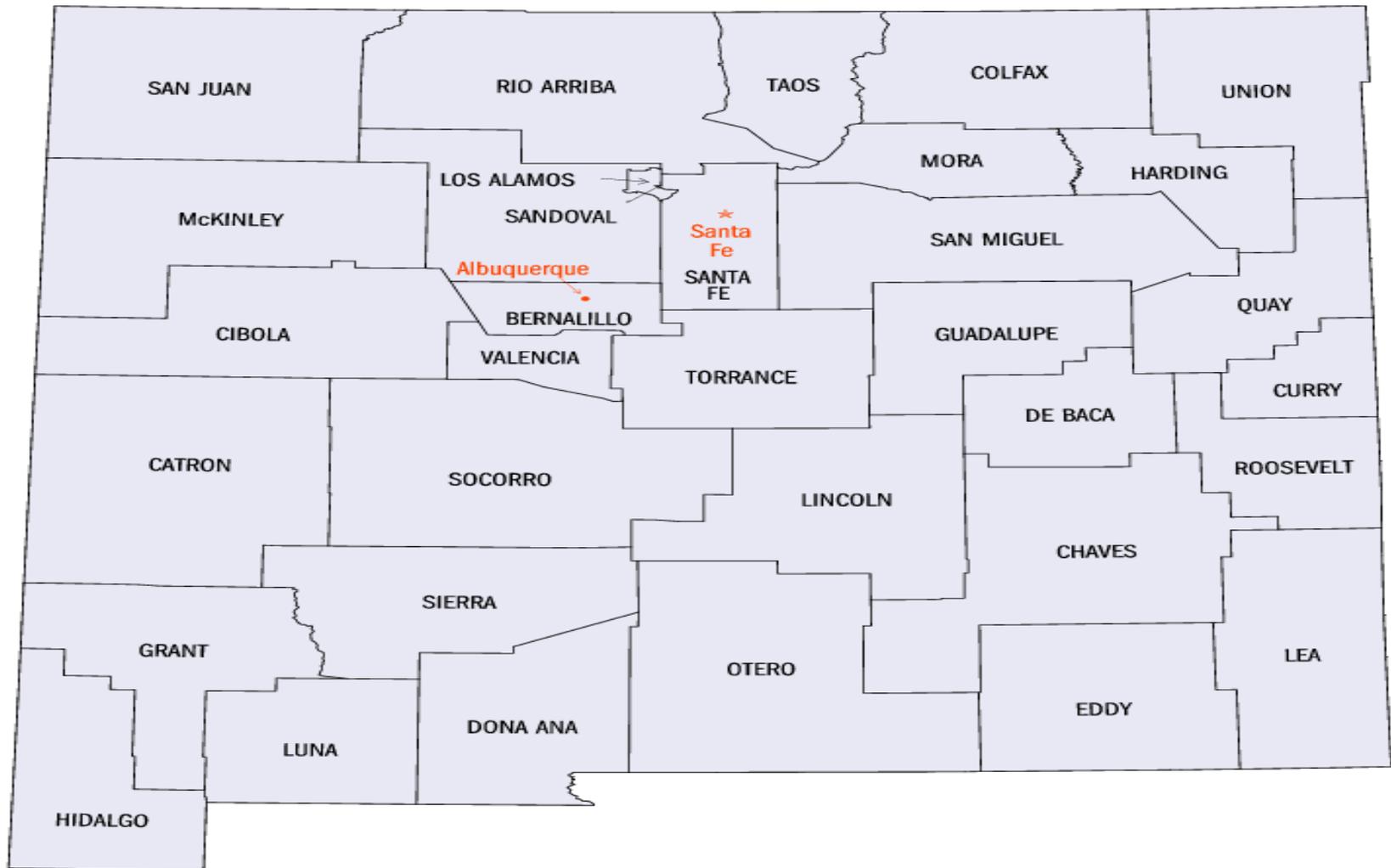
# Migration Streams in the Southwestern States

This section includes an analysis of migration to and from several counties in the Southwestern United States, particularly areas that are considered competitors of the Paso del Norte region. It is possible that the Paso del Norte region may be able to tap into the migration streams that are moving to other areas in the southwestern portion of the US.

# Map of Counties in Texas



# Map of Counties in New Mexico



## County Migration Data - El Paso County, Texas 2005 to 2006

### Migration of El Paso County

El Paso County had 2,649 households move to the county and 12,129 move from the county for a net gain of 520 households. El Paso loses more households to other areas in the U.S. than it gains for a net loss of 326 households within the US. On the other hand, El Paso county had a net gain of 846 households from a foreign country.

Migration to El Paso County contributed .2 percent growth to the county. Sixty-eight percent of El Paso's in-migration comes from a variety of other states, but unfortunately it loses more households to other states than it gains.

El Paso loses the greatest number of households to Maricopa County, AZ and Bexar County, TX. Both of these areas have military bases.

Internal Revenue Service Migration Data for El Paso County, Texas 2005 to 2006				
Households Moving Into and Out of El Paso County and Net Migration		In	Out	Net Migration
TX	El Paso County Total Migration-US & Foreign	12,649	12,129	520
TX	El Paso County Total Migration-US	11,157	11,483	-326
TX	El Paso County Total Migration-Same State	2,529	3,113	-584
TX	El Paso County Total Migration-Different State	8,628	8,370	258
TX	El Paso County Total Migration-Foreign	1,492	646	846
TX	El Paso County Non-Migrants	227,935	227,935	0
FR	Foreign - APO/FPO ZIPs	1,196	562	634
NM	Dona Ana County	748	905	-157
CA	Los Angeles County	439	225	214
AZ	Maricopa County	381	625	-244
TX	Bexar County	318	544	-226
TX	Bell County	273	116	157
CA	San Diego County	222	163	59
TX	Harris County	204	248	-44
HI	Honolulu County	200	105	95
TX	Tarrant County	180	315	-135
TX	Dallas County	178	292	-114
NM	Bernalillo County	173	307	-134
CA	San Bernardino County	162	78	84
SS	Other Flows - Same State	315	317	-2
DS	Other Flows - Different State	2,349	2,191	158
DS	Other Flows - Northeast	378	286	92
DS	Other Flows - Midwest	656	620	36
DS	Other Flows - South	870	842	28
DS	Other Flows - West	445	443	2
FR	Foreign - Other flows	284	66	218

## County Migration Data (Santa Fe County, New Mexico)

### Migration of Santa Fe County

Santa Fe County had a modest net in-migration of 73 households between 2005 and 2006. Santa Fe County had only a net migration of 14 foreign households.

Migration to Santa Fe County contributed .16 percent growth to the county.

The largest out-of-state migration stream to Santa Fe County comes from Los Angeles County, California.

Internal Revenue Service Migration Data for Santa Fe, New Mexico 2005 to 2006				
Households Moving Into and Out of Santa Fe County and Net Migration		In	Out	Net Migration
NM	Santa Fe County Total Migration-US	3,915	3,842	73
NM	Santa Fe County Total Migration-US	3,865	3,806	59
NM	Santa Fe County Total Migration-Same State	1,304	1,831	-527
NM	Santa Fe County Total Migration-Different State	2,561	1,975	586
NM	Santa Fe County Total Migration-Foreign	50	36	14
NM	Santa Fe County Non-Migrant	46,638	46,638	0
NM	Bernalillo County	541	812	-271
NM	Rio Arriba County	194	198	-4
CA	Los Angeles County	125	77	48
NM	Sandoval County	113	331	-218
NM	San Miguel County	110	87	23
AZ	Maricopa County	77	94	-17
NM	Los Alamos County	76	65	11
NM	Dona Ana County	62	67	-5
CA	San Diego County	60	30	30
IL	Cook County	55	19	36
NM	Taos County	41	29	12
AZ	Pima County	40	39	1
NM	Torrance County	37	53	-16
SS	Other Flows - Same State	66	78	-12
DS	Other Flows - Different State	1,257	1,154	103
DS	Other Flows - Northeast	246	162	84
DS	Other Flows - Midwest	269	196	73
DS	Other Flows - South	444	433	11
DS	Other Flows - West	298	363	-65
FR	Foreign - Other flows	33	36	-3

## County Migration Data (Dona Ana, New Mexico)

### Migration of Dona Ana County

Dona Ana County had a net in-migration of 664 households between 2005 and 2006. In contrast to El Paso County which has a net loss to other areas in the US, 69 percent of the migration to Dona Ana County comes from other areas in the US.

Migration to Dona Ana County contributed 1.16 percent to the number of households in the county.

The largest out-of-state migration stream to Santa Fe County comes from Los Angeles County, California.

Internal Revenue Service Migration Data for Dona Ana, New Mexico 2005 to 2006			
Households Moving Into and Out of Dona Ana, NM County	IN	Out	Net Migration
NM Dona Ana County Total Migration-US	4,813	4,149	664
NM Dona Ana County Total Migration-US	4,651	4,090	561
NM Dona Ana County Total Migration-Same State	1,250	1,150	100
NM Dona Ana County Total Migration-Different State	3,401	2,940	461
NM Dona Ana County Tot Migration-Foreign	162	59	103
NM Dona Ana County Non-Migrant	57,181	57,181	0
TX El Paso County	905	748	157
NM Bernalillo County	202	369	-167
NM Otero County	176	125	51
AZ Maricopa County	138	203	-65
CA Los Angeles County	112	51	61
NM Grant County	104	51	53
NM Luna County	101	70	31
CA San Diego County	76	50	26
NM Chaves County	74	44	30
NM Sierra County	70	41	29
NM Eddy County	68	35	33
NM Santa Fe County	67	62	5
NM Lincoln County	60	36	24
SS Other Flows - Same State	38	44	-6
DS Other Flows - Different State	1,426	1,170	256
DS Other Flows - Northeast	155	98	57
DS Other Flows - Midwest	321	241	80
DS Other Flows - South	552	513	39
DS Other Flows - West	398	318	80

## County Migration Data (Bexar County, Texas)

### Migration of Bexar County

Bexar County had a net in-migration of 7,002 households between 2005 and 2006. In contrast to El Paso County which has a net loss to other areas in the US, 83 percent of the migration to Bexar County comes from other areas in the US.

Migration to Bexar County contributed 1.4 percent to the number of households in the county.

The largest out-of-state migration stream to Bexar County came from Orleans Parish, LA. This is likely a direct result of the Hurricane Katrina Diaspora.

Los Angeles County is the only other area in the US that had a large in-migration to Bexar County. The other flows from other states, however is quite large and suggests that Bexar County draws from a wide area of the US.

Internal Revenue Service Migration Data for Bexar County, Texas 2005 to 2006				
Households Moving Into and Out of Bexar County, TX and Net Migration		In	Out	Net Migration
TX	Bexar County Total Migration-US & Foreign	34,867	27,865	7,002
TX	Bexar County Total Migration-US	33,348	26,705	6,643
TX	Bexar County Total Migration-Same State	15,991	15,140	851
TX	Bexar County Total Migration-Different State	17,357	11,565	5,792
TX	Bexar County Total Migration-Foreign	1,519	1,160	359
TX	Bexar County Non-Migrants	500,874	500,874	0
TX	Harris County	1,297	1,229	68
FR	Foreign - APO/FPO ZIPs	1,149	1,040	109
TX	Travis County	1,120	1,299	-179
LA	Orleans Parish	1,051	15	1,036
TX	Guadalupe County	948	1,632	-684
CA	Los Angeles County	793	273	520
TX	Comal County	781	1,180	-399
TX	Nueces County	731	436	295
TX	Dallas County	715	658	57
TX	Atascosa County	559	544	15
TX	El Paso County	544	318	226
TX	Tarrant County	518	502	16
TX	Hidalgo County	508	307	201
TX	Webb County	490	229	261
TX	Medina County	481	552	-71
TX	Wilson County	448	603	-155
SS	Other Flows - Same State	427	400	27
DS	Other Flows - Different State	2,959	2,522	437
DS	Other Flows - Northeast	421	379	42
DS	Other Flows - Midwest	916	753	163

## County Migration Data (Webb County, Texas)

### Migration of Webb County

Webb County, another border county had 2,254 households move to the county and 2,263 move from the county for a net loss of 9 households. Webb County loses more households to other areas in the U.S. than it gains for a net loss of 327 households within the US. On the other hand, Webb county had a net gain of 119 households from a foreign country.

Thirty-six percent of Webb County's in-migration comes from a different state, 7 percent of Webb County's in-migration comes from a foreign country and 44 percent comes from Texas.

Webb County loses the greatest number of households to Bexar County.

Internal Revenue Service Migration Data for Webb County, Texas - 2005 to 2006				
Households Moving Into and Out of Webb County, TX and Net Migration		In	Out	Net Migration
TX	Webb County Total Migration-US & Foreign	2,254	2,263	-9
TX	Webb County Total Migration-US	2,085	2,213	-128
TX	Webb County Total Migration-Same State	1,260	1,587	-327
TX	Webb County Total Migration-Different State	825	626	199
TX	Webb County Total Migration-Foreign	169	50	119
TX	Webb County Non-Migrants	64,795	64,795	0
TX	Bexar County	229	490	-261
TX	Harris County	167	173	-6
TX	Dallas County	105	76	29
TX	Hidalgo County	74	117	-43
TX	Nueces County	61	65	-4
TX	Cameron County	51	39	12
TX	Zapata County	48	30	18
TX	Tarrant County	46	38	8
TX	Travis County	45	89	-44
IL	Cook County	41	20	21
CA	San Diego County	32	16	16
TX	Maverick County	31	21	10
FR	Foreign - APO/FPO ZIPs	27	0	27
TX	El Paso County	23	36	-13
SS	Other Flows - Same State	212	191	21
DS	Other Flows - Different State	673	525	148
DS	Other Flows - Northeast	74	44	30
DS	Other Flows - Midwest	214	131	83
DS	Other Flows - South	206	198	8
DS	Other Flows - West	179	152	27

## County Migration Data (Cameron County, Texas)

### Migration of Cameron County

Cameron County, another border county had 4,779 households move to the county and 4,996 move from the county for a net loss of 217 households. Cameron County loses more households to other areas in Texas, than it gains for a net loss of 565 households within the state. On the other hand, Cameron county had a net gain of 91 households from a foreign country and 257 households from other states.

Ninety-six percent of Cameron County's in-migration comes from the US (a little more than half from Texas), and 3.5 percent of Cameron County's in-migration comes from a foreign country.

Cameron County loses the greatest number of households to Bexar County and Hidalgo County.

Internal Revenue Service Migration Data for Cameron County, Texas				
Webb 2005 to 2006				
Households Moving Into and Out of Cameron County, TX and Net Migration		In	Out	Net Migration
TX	Cameron County Total Migration-US & Foreign	4,779	4,996	-217
TX	Cameron County Total Migration-US	4,612	4,920	-308
TX	Cameron County Total Migration-Same State	2,507	3,072	-565
TX	Cameron County Total Migration-Different State	2,105	1,848	257
TX	Cameron County Total Migration-Foreign	167	76	91
TX	Cameron County Non-Migrants	104,349	104,349	0
TX	Hidalgo County	592	712	-120
TX	Harris County	404	492	-88
TX	Bexar County	243	416	-173
TX	Willacy County	143	83	60
TX	Travis County	136	175	-39
TX	Dallas County	112	136	-24
TX	Nueces County	106	124	-18
TX	Tarrant County	62	87	-25
FR	Foreign - APO/FPO ZIPs	60	55	5
CA	San Diego County	59	33	26
FL	Palm Beach County	40	26	14
CA	Los Angeles County	39	20	19
FL	Lee County	39	25	14
TX	Webb County	39	51	-12
SS	Other Flows - Same State	252	273	-21
DS	Other Flows - Different State	1,464	1,418	46
DS	Other Flows - Northeast	100	88	12
DS	Other Flows - Midwest	577	509	68
DS	Other Flows - South	499	570	-71
DS	Other Flows - West	288	251	37
FR	Foreign - Other flows	107	21	86

## County Migration Data (Maricopa County, Arizona)

### Migration of Maricopa County, Arizona

Maricopa County had 84,709 households move to the county and 59,899 move from the county for a net gain of 24,803 households. Maricopa gains more households from other areas in the U.S. than it loses for a net gain of 28,968 households within the US. Maricopa County had a net gain of 763 households from a foreign country.

Migration to Maricopa contributed 2.3 percent growth to the county. Eighty-six percent of Maricopa County's in-migration comes from a variety of other states and just under 1 percent (.9 percent) came from a foreign country.

Maricopa County loses the greatest number of households to other counties in Arizona, particularly Pinal County.

Significant out-of-state migration flows come from southern California, Cook County, IL, Clark County, NV and King County, WA.

Internal Revenue Service Migration Data for Maricopa County, Arizona 2005 to 2006				
Households Moving Into and Out of Maricopa County, AZ and Net Migration		In	Out	Net Migration
AZ	Maricopa County Total Migration-US	84,702	59,899	24,803
AZ	Maricopa County Total Migration-US	83,007	58,967	24,040
AZ	Maricopa County Total Migration-Same State	11,294	16,222	-4,928
AZ	Maricopa County Total Migration-Different State	71,713	42,745	28,968
AZ	Maricopa County Total Migration-Foreign	1,695	932	763
AZ	Maricopa County Non-Migrant	1,095,956	1,095,956	0
CA	Los Angeles County	5,388	1,456	3,932
AZ	Pinal County	2,874	8,078	-5,204
AZ	Pima County	2,691	1,925	766
CA	San Diego County	2,637	1,224	1,413
CA	Orange County	2,333	715	1,618
IL	Cook County	1,598	664	934
NV	Clark County	1,554	1,246	308
CA	Riverside County	1,283	518	765
AZ	Yavapai County	1,277	1,966	-689
AZ	Coconino County	1,213	945	268
CA	San Bernardino County	1,175	392	783
WA	King County	926	667	259
CA	Santa Clara County	818	352	466
CA	Ventura County	740	176	564
AZ	Navajo County	698	848	-150
SS	Other Flows - Same State	28	39	-11
DS	Other Flows - Different State	5,030	5,142	-112
DS	Other Flows - Northeast	392	436	-44
DS	Other Flows - Midwest	1,995	1,983	12
DS	Other Flows - South	2,010	1,992	18
DS	Other Flows - West	633	731	-98

# County Migration Data (Bernalillo County, New Mexico)

## Migration of Bernalillo County, NM

Bernalillo County had 16,189 households move to the county and 14,081 move from the county for a net gain of 2,108 households. Bernalillo County gains more households from other areas in the U.S. than it loses for a net gain of 1,921 households from within the US. Bernalillo County had a net gain of 180 households from a foreign country.

Migration to Bernalillo County contributed 1.0 percent growth to the county. Fifty-nine percent of Bernalillo County's in-migration comes from other states and 2.9 percent is from a foreign country. The balance, 38 percent, comes from within the state.

Bernalillo loses the greatest number of households to Sandoval County, NM. Migration streams to Bernalillo County come from Maricopa County, AZ; Los Angeles County, and El Paso County.

Internal Revenue Service Migration Data for Bernalillo County, New Mexico 2005 to 2006				
Households Moving Into and Out of Bernalillo County NM and Net Migration		In	Out	Net Migration
NM	Bernalillo County Total Migration-US	16,189	14,081	2,108
NM	Bernalillo County Total Migration-US	15,720	13,799	1,921
NM	Bernalillo County Total Migration-Same State	6,037	5,343	694
NM	Bernalillo County Total Migration-Different State	9,683	8,456	1,227
NM	Bernalillo County Total Migration-Foreign	469	282	187
NM	Bernalillo County Non-Migrant	209,181	209,181	0
NM	Sandoval County	1,711	2,259	-548
NM	Santa Fe County	812	541	271
NM	Valencia County	795	738	57
AZ	Maricopa County	426	676	-250
CA	Los Angeles County	423	217	206
NM	Dona Ana County	369	202	167
NM	Mckinley County	369	211	158
TX	El Paso County	307	173	134
NM	San Juan County	296	216	80
FR	Foreign - APO/FPO ZIPs	256	194	62
CA	San Diego County	251	160	91
NV	Clark County	213	262	-49
NM	Cibola County	202	123	79
NM	Torrance County	188	181	7
NM	San Miguel County	151	90	61
SS	Other Flows - Same State	25	17	8
DS	Other Flows - Different State	2,625	2,464	161
DS	Other Flows - Northeast	403	387	16
DS	Other Flows - Midwest	691	590	101
DS	Other Flows - South	992	1,050	-58
DS	Other Flows - West	539	437	102

## County Migration Data (Pima County, Arizona)

### Migration of Pima County, AZ

Pima County had 21,038 households move to the county and 16,569 move from the county for a net gain of 4,469 households. Pima County gains more households to other areas in the U.S. than it loses for a net gain of 4,058 households from within the US. Pima County had a net gain of 411 households from a foreign country.

Migration to Pima County contributed 1.8 percent growth to the county. Seventy-four percent of Pima County's in-migration comes other states and 1.9 percent is from a foreign country. The balance of 24 percent comes from within state.

Pima loses the greatest number of households to Maricopa County, AZ. Migration streams to Pima County come from southern California, Clark County, NV, King County, WA and Cook County, IL.

Internal Revenue Service Migration Data for Pima County, Arizona 2005 to 2006				
Households Moving Into and Out of Pima County, AZ and Net Migration		In	Out	Net Migration
AZ	Pima County Total Migration-US & Foreign	21,038	16,569	4,469
AZ	Pima County Total Migration-US	20,139	16,081	4,058
AZ	Pima County Total Migration-Same State	4,552	4,910	-358
AZ	Pima County Total Migration-Different State	15,587	11,171	4,416
AZ	Pima County Total Migration-Foreign	899	488	411
AZ	Pima County Non-Migrants	294,297	294,297	0
AZ	Maricopa County	1,925	2,691	-766
AZ	Cochise County	735	529	206
CA	Los Angeles County	724	357	367
CA	San Diego County	588	358	230
AZ	Pinal County	460	510	-50
FR	Foreign - APO/FPO ZIPs	415	366	49
AZ	Santa Cruz County	394	280	114
NV	Clark County	367	340	27
CA	Orange County	291	130	161
CA	Riverside County	281	116	165
AZ	Coconino County	255	188	67
CA	San Bernardino County	227	95	132
WA	King County	194	179	15
IL	Cook County	191	119	72
AZ	Yavapai County	179	167	12
SS	Other Flows - Same State	12	15	-3
DS	Other Flows - Different State	3,390	3,230	160
DS	Other Flows - Northeast	473	480	-7
DS	Other Flows - Midwest	1,120	901	219
DS	Other Flows - South	1,193	1,220	-27
DS	Other Flows - West	604	629	-25

# Summary of Migration Trends in the Southwestern US

The chart shows the contribution of net-in-migration to each of the counties included in this analysis.

Despite being large metropolitan areas, Pima and Maricopa Counties in Arizona continue to grow their population base with in-migration.

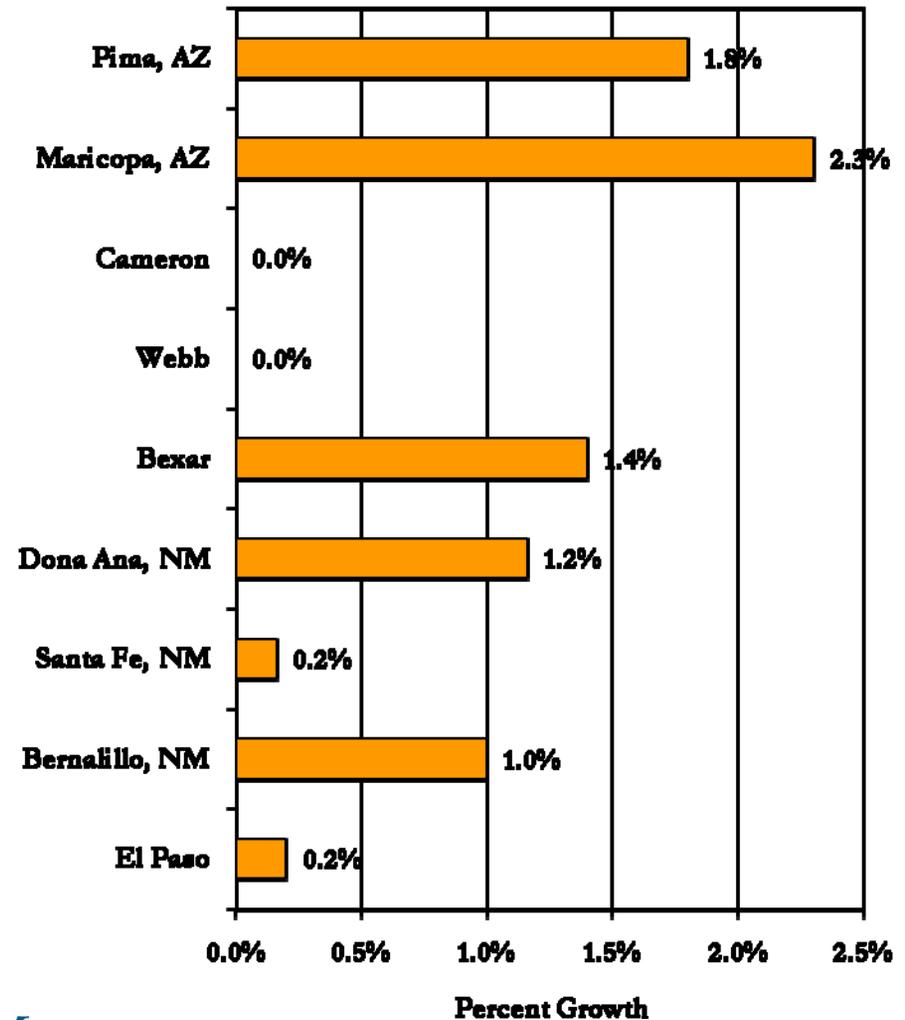
It is clear that Dona Ana and Bernalillo Counties in New Mexico have developed migration streams that are likely based on retiree attraction. They have a strong influx of households from other states that are derived to a great extent from the same areas as that of Pima and Maricopa counties in Arizona.

Santa Fe County was a bit of a surprise in that it does not have a significant in-migration stream and it may be more of a tourist destination as opposed to a retiree attraction area. We have not studied this, but have only looked at the migration data for this area.

Net in-migration to El Paso has a small impact on its growth. The growth is from foreign countries and is not from other states. The out-migration from El Paso to other states needs to be better understood. As an outside observer, it may be because there appear to be better neighborhoods in other locations than in El Paso County.

El Paso County has low-cost housing, but that housing is located in neighborhoods that do not have streetscapes, green areas, play grounds or parks. There are few neighborhoods in El Paso that give you the opportunity to walk to a restaurant, park, coffee shop or other destination.

**Net Migration Contribution to Growth in County**



# Migration Streams to Southwestern US States

Migration to Southwestern states is dominated by streams from Los Angeles County and San Diego County. El Paso County has a measurable migration stream from these areas.

Other California counties that contribute to migration streams to these counties include Orange, Riverside, San Bernardino, Ventura and Santa Clara counties. All of the California counties, with the exception of Santa Clara are in southern California. Santa Clara county is just below San Francisco.

Other counties that show migration streams to the Southwestern counties include Clark County, NV; Cook County, IL; Maricopa and Pima Counties in Arizona; and King County, Washington. Interestingly, Cameron County shows a small migration stream from two counties in Florida Palm Beach and Lee counties.

These areas that have migration streams to counties in Southwestern cities should be targeted in marketing efforts.

Migration Streams to Counties (in Bold) from Out-of-State Counties								
<b>El Paso</b>	<b>Bernalillo</b>	<b>Dona Ana</b>	<b>Santa Fe</b>	<b>Bexar</b>	<b>Webb</b>	<b>Cameron</b>	<b>Maricopa</b>	<b>Pima</b>
Los Angeles Maricopa, AZ San Diego Bernalillo	Maricopa, AZ Los Angeles El Paso San Diego Clark, NV	El Paso Maricopa, AZ Los Angeles San Diego	Los Angeles Maricopa, AZ San Diego Cook, IL Pima, AZ	Orleans, LA Los Angeles	Cook, IL San Diego	San Diego Palm Beach Los Angeles Lee, FL	Los Angeles San Diego Orange, CA Cook, IL Clark, NC Riverside, CA San Bernadino, CA King, WA Santa Clara, CA Ventura, CA	Los Angeles San Diego Clark, NC Orange, CA Riverside, CA San Bernadino, CA King, WA Cook, IL

# Assessment of Demand by Product Type



**Special Note:** *These demand estimates are preliminary and should not to be used for the development or financing of age-qualified housing. These demand estimates represent a general overview and are not site specific.*

## **Terms Used in This Section**

**Qualified Households:** the households who are within the age and income groups specified.

**Demand:** an estimate of the number of households that will purchase or rent (if applicable) the product for which demand is estimated.

**ProMatura Demand Model:** The ProMatura Demand Model was developed from a comprehensive survey of a national sample of households who had made the decision to move and who were in the process of shopping for age-qualified housing or a retirement community. The study by ProMatura showed the proportion of households who moved to each type of age-qualified housing community varies significantly by age and income. The ProMatura Model uses 63 numeric multipliers (seven age groups by nine incomes groups) to project the proportion of households who are likely to make the decision to move to each type of age-qualified housing community, and the proportion who are shopping for and have a high probability of moving to each type of age-qualified housing community.

**Annual Demand:** the demand projections are estimated for a 12 month time period. It is assumed that the demand is renewed continually. If market conditions change and if there is population growth or decline, the demand estimates would be adjusted accordingly.

**Market Opportunity:** market opportunity is the estimate of excess demand over supply.