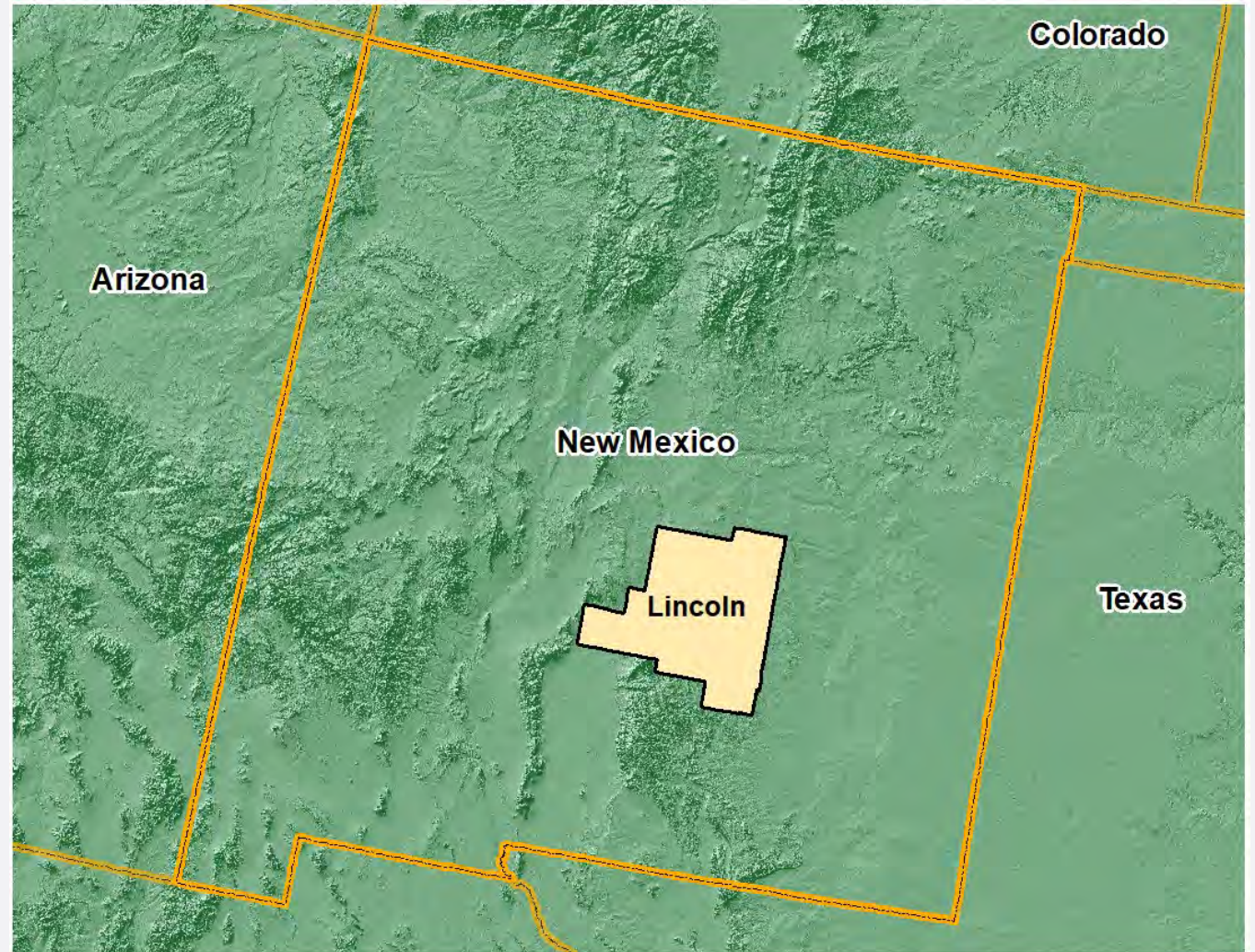


# Industry Cluster

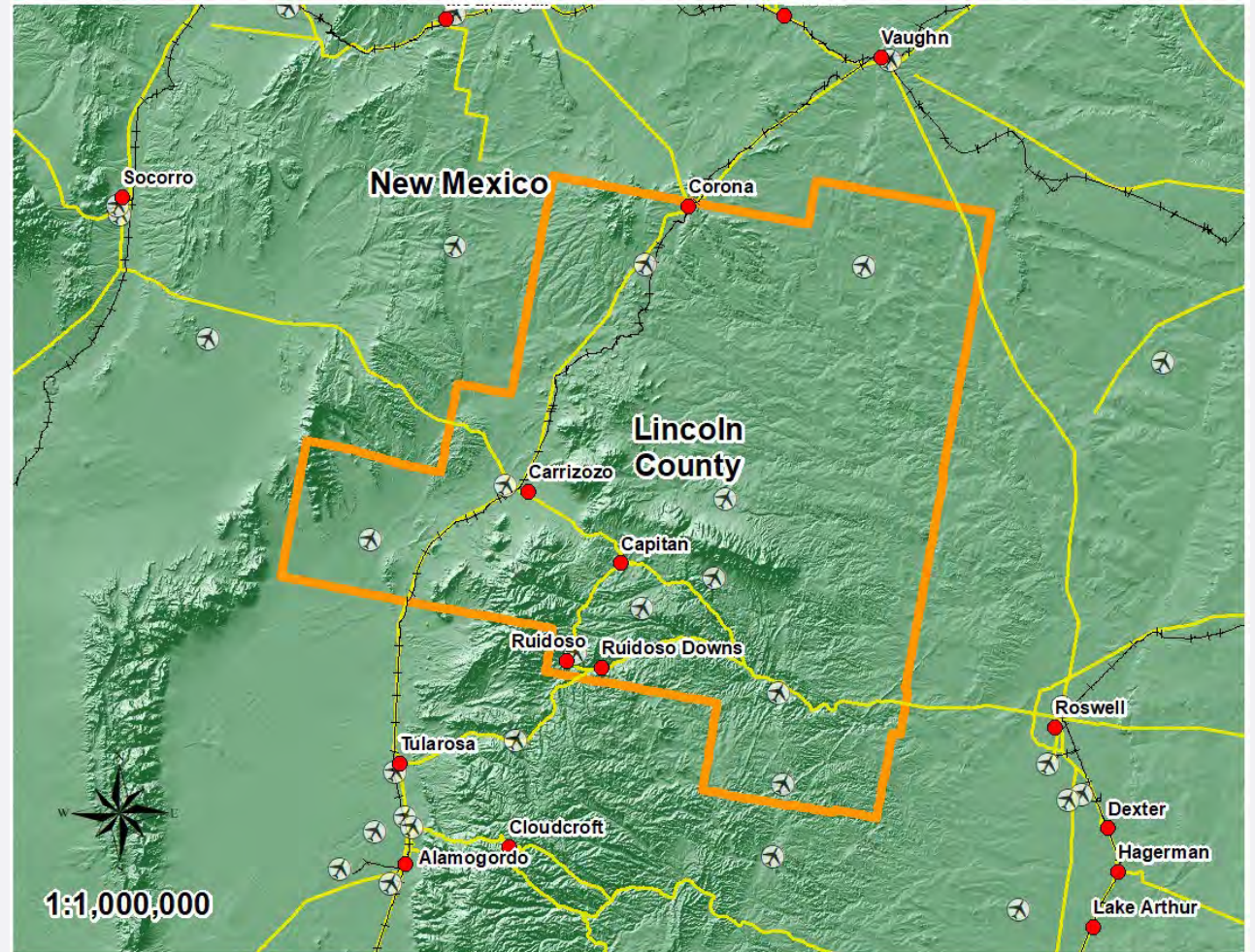
Lincoln County, New Mexico





## Southeastern New Mexico Region

- Lincoln County





# Industry cluster drilldown

**1. Energy**

**2. Agribusiness**

**3. Arts/Entertainment/Recreation/Visitors**



# Regional Job Growth:

## *Three Key Components of the Shift-Share Analysis*

### Expected Change

The sum of the industrial mix and the national growth effects

National Growth Effect

Explains how much of the regional industry's growth is explained by the overall growth of the national economy

Industrial Mix Effect

Share of regional industry growth explained by the growth of the specific industry sector at the national level

Regional Competitive Effect

Explains how much of the change in a given industry is due to some unique competitive advantage that the region possesses

### Note:

The calculations ensure no double counting of job change effects from national to regional levels



## Shift-Share Analysis (Regional Performance) by Top Industry Sectors

Industries	Jobs 2021	National Trend 2016-2021 (A)	Industry Trend 2016-2021 (B)	Cumulative Expected Growth (C=A+B)	Actual Job Growth 2016-2021 (D)	Regional Performance, 2016-2021 (D-C)
Gasoline Stations with Convenience Stores	145	2	1	3	4	↑ 1
Miscellaneous Intermediation	95	1	2	4	1	-3
Plumbing, Heating, and Air-Conditioning Contractors	51	1	6	7	0	-7
Electrical Contractors and Other Wiring Installation Contractors	29	0	3	3	2	-1
Natural Gas Distribution	28	1	-3	-2	-27	-25
Drilling Oil and Gas Wells	18	1	-16	-15	-48	-32
Fuel Dealers	14	0	-1	-1	-17	-16
Support Activities for Oil and Gas Operations	13	1	-8	-7	-26	-19
Water and Sewer Line and Related Structures Construction	13	0	0	0	Insf. Data	↑ 12
Electric Power Distribution	12	0	0	0	-6	-6
Relay and Industrial Control Manufacturing	<10	0	0	0	Insf. Data	↑ 0
Plumbing and Heating Equipment and Supplies (Hydronics) Merchant Wholesalers	<10	0	0	0	Insf. Data	↑ 5
Other Heavy and Civil Engineering Construction	<10	0	1	1	Insf. Data	-13
Other Gasoline Stations	<10	0	-1	-1	Insf. Data	-5
Crude Petroleum Extraction	<10	0	-2	-2	Insf. Data	-1

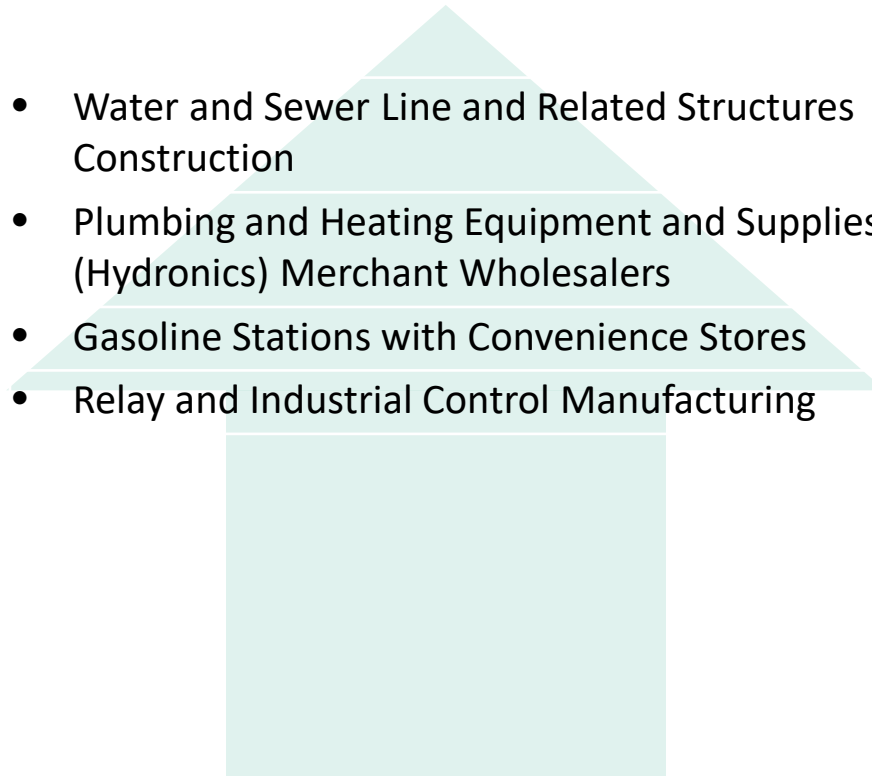
Several Energy sectors show <10 jobs.

Note: Upward arrow (↑) indicates regional competitiveness.

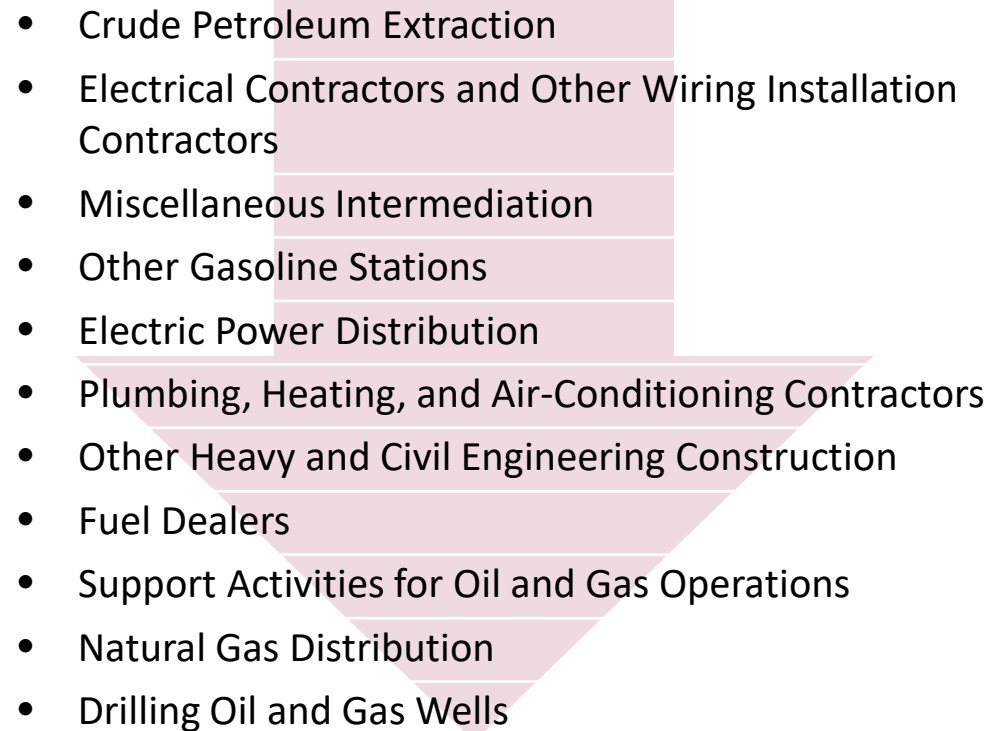


## Shift-Share Analysis 2021

### Industries that Outperformed

- 
- Water and Sewer Line and Related Structures Construction
  - Plumbing and Heating Equipment and Supplies (Hydronics) Merchant Wholesalers
  - Gasoline Stations with Convenience Stores
  - Relay and Industrial Control Manufacturing

### Industries that Underperformed

- 
- Crude Petroleum Extraction
  - Electrical Contractors and Other Wiring Installation Contractors
  - Miscellaneous Intermediation
  - Other Gasoline Stations
  - Electric Power Distribution
  - Plumbing, Heating, and Air-Conditioning Contractors
  - Other Heavy and Civil Engineering Construction
  - Fuel Dealers
  - Support Activities for Oil and Gas Operations
  - Natural Gas Distribution
  - Drilling Oil and Gas Wells

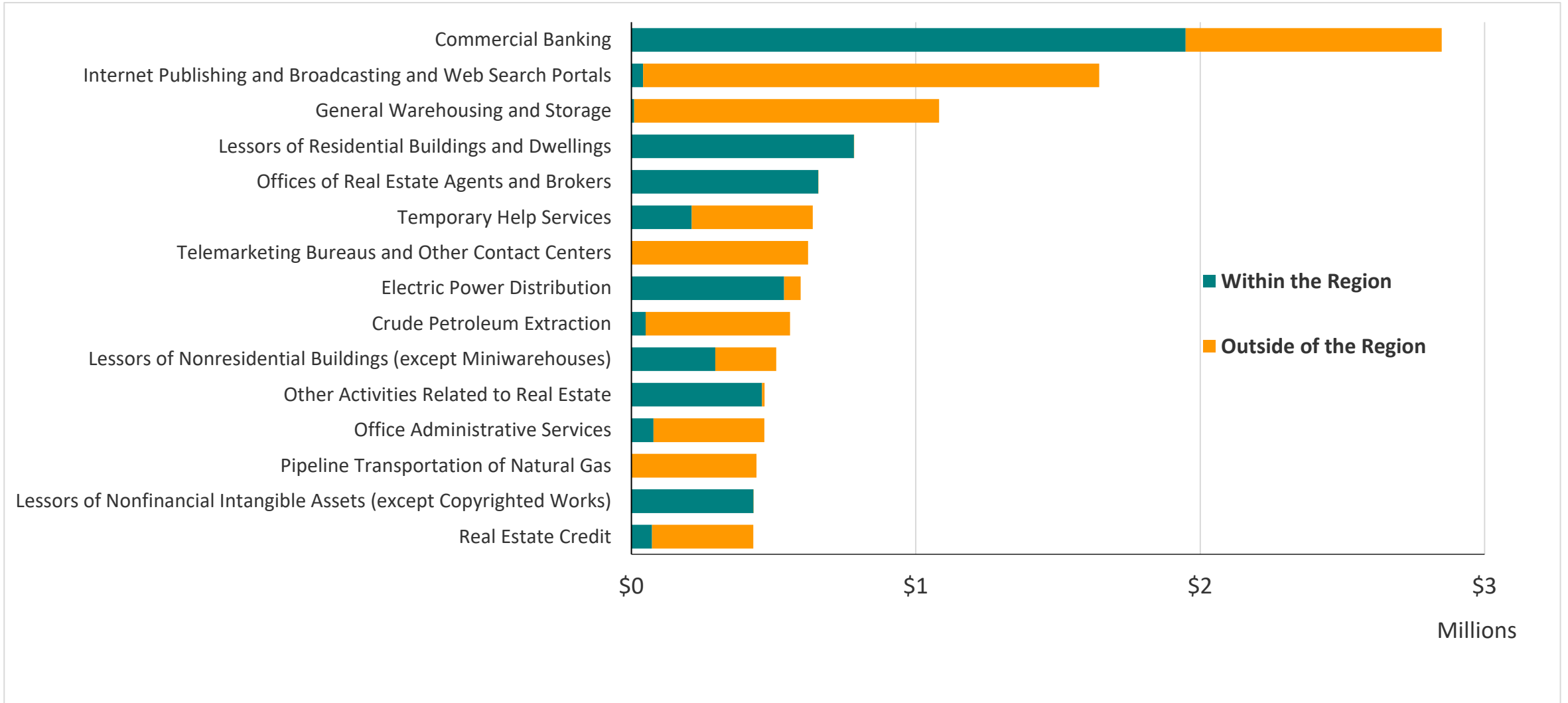


## Leakage analysis: Top 15 Industries by Inputs

Industries	Estimated Input (\$ Millions), 2021	% In-Region	% Out of Region
Commercial Banking	\$2.8	68.4%	31.6%
Internet Publishing and Broadcasting and Web Search Portals	\$1.6	2.5%	97.5%
General Warehousing and Storage	\$1.1	0.9%	99.1%
Lessors of Residential Buildings and Dwellings	\$0.8	100.0%	0.0%
Offices of Real Estate Agents and Brokers	\$0.7	99.9%	0.1%
Temporary Help Services	\$0.6	33.3%	66.7%
Telemarketing Bureaus and Other Contact Centers	\$0.6	0.0%	100.0%
Electric Power Distribution	\$0.6	90.3%	9.7%
Crude Petroleum Extraction	\$0.6	9.0%	91.0%
Lessors of Nonresidential Buildings (except Miniwarehouses)	\$0.5	57.9%	42.1%
Other Activities Related to Real Estate	\$0.5	98.0%	2.0%
Office Administrative Services	\$0.5	16.7%	83.3%
Pipeline Transportation of Natural Gas	\$0.4	0.0%	100.0%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	\$0.4	100.0%	0.0%
Real Estate Credit	\$0.4	16.9%	83.1%



# Leakage analysis 2021



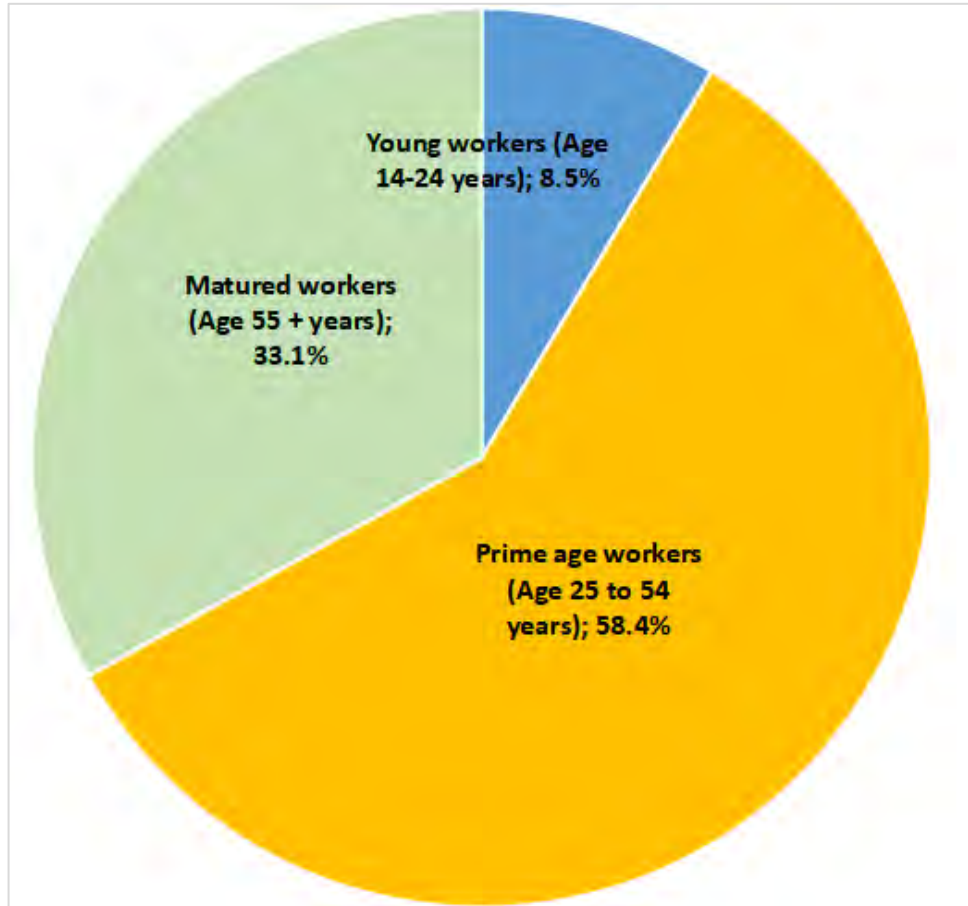




Occupations	Jobs 2021	% Change 2016-2021	% of Total Jobs in Cluster 2020	Median Hour Earnings	Entry level Education	Automation
Cashiers	86	-8%	18.0%	\$11.02	No formal educational credential	105.5
Personal Financial Advisors	50	7%	10.4%	\$37.96	Bachelor's degree	89.4
First-Line Supervisors of Retail Sales Workers	20	-1%	4.2%	\$16.42	High school diploma or equivalent	87.8
Securities, Commodities, and Financial Services Sales Agents	18	-12%	3.7%	\$20.98	Bachelor's degree	92.8
Plumbers, Pipefitters, and Steamfitters	16	34%	3.3%	\$20.12	High school diploma or equivalent	116.3
Managers, All Other	14	-45%	3.0%	\$20.14	Bachelor's degree	84.5
Electricians	14	21%	3.0%	\$24.17	High school diploma or equivalent	110.3
General and Operations Managers	11	4%	2.3%	\$42.59	Bachelor's degree	82.2
Power Plant Operators	<10	-24%	0.1%	\$42.41	High school diploma or equivalent	108.8
Surveying and Mapping Technicians	<10	-45%	0.2%	\$20.00	High school diploma or equivalent	94.3
Couriers and Messengers	<10	89%	0.1%	\$18.20	High school diploma or equivalent	105.3
Dispatchers, Except Police, Fire, and Ambulance	<10	-31%	0.2%	\$17.59	High school diploma or equivalent	95.1
Chief Executives	<10	-15%	0.9%	\$29.02	Bachelor's degree	82
Meter Readers, Utilities	<10	-21%	0.4%	\$15.68	High school diploma or equivalent	114.6
First-Line Supervisors of Mechanics, Installers, and Repairers	<10	-24%	0.7%	\$34.99	High school diploma or equivalent	94



## Worker demographics 2021



- Hispanic workers (28.0%)
- Black or African-American workers (3.0%)
- Asian workers (2.0%)
- White workers (65%)
- Two or more races (1%)
  
- Male workers (69%)
- Female workers (31%)

- One-third (33%) of the workforce is comprised of matured (aged 55 years or more) workers.



## Shift-Share Analysis (Regional Performance) by Top Industry Sectors


Industries	Jobs 2021	National Trend 2016-2021 (A)	Industry Trend 2016-2021 (B)	Cumulative Expected Growth (C=A+B)	Actual Job Growth 2016-2021 (D)	Regional Performance, 2016-2021 (D-C)
Animal Production	347	5	-18	-12	-29	-16
Wineries	65	0	0	0	Insf. Data	↑ 64
Breweries	21	0	0	0	Insf. Data	↑ 19
Farm Labor Contractors and Crew Leaders	13	0	0	0	Insf. Data	↑ 4
Cotton Ginning	<10	0	0	0	Insf. Data	↑ 0
Distilleries	<10	0	1	1	Insf. Data	↑ 2
Postharvest Crop Activities (except Cotton Ginning)	<10	0	0	0	Insf. Data	↑ 1
Farm Management Services	<10	0	0	0	Insf. Data	↑ 1
Flour Milling	<10	0	0	0	Insf. Data	↑ 1
Rice Milling	<10	0	0	0	Insf. Data	↑ 1
Soil Preparation, Planting, and Cultivating	<10	0	0	0	Insf. Data	↑ 2
Animal (except Poultry) Slaughtering	<10	0	0	0	Insf. Data	↑ 0
Fats and Oils Refining and Blending	<10	0	0	0	Insf. Data	↑ 1
Breakfast Cereal Manufacturing	<10	0	0	0	Insf. Data	↑ 1

Note: Upward arrow (↑) indicates regional competitiveness. <10 means that industry might not exist and hence will require field verification.



## Shift-Share Analysis 2021

### Industries that Outperformed

- 
- Wineries
  - Breweries
  - Farm Labor Contractors and Crew Leaders
  - Distilleries
  - Soil Preparation, Planting, and Cultivating
  - Farm Management Services
  - Flour Milling
  - Breakfast Cereal Manufacturing
  - Rice Milling
  - Fats and Oils Refining and Blending
  - Postharvest Crop Activities (except Cotton Ginning)
  - Animal (except Poultry) Slaughtering
  - All Other Miscellaneous Food Manufacturing

### Industries that Underperformed

- 
- Animal Production

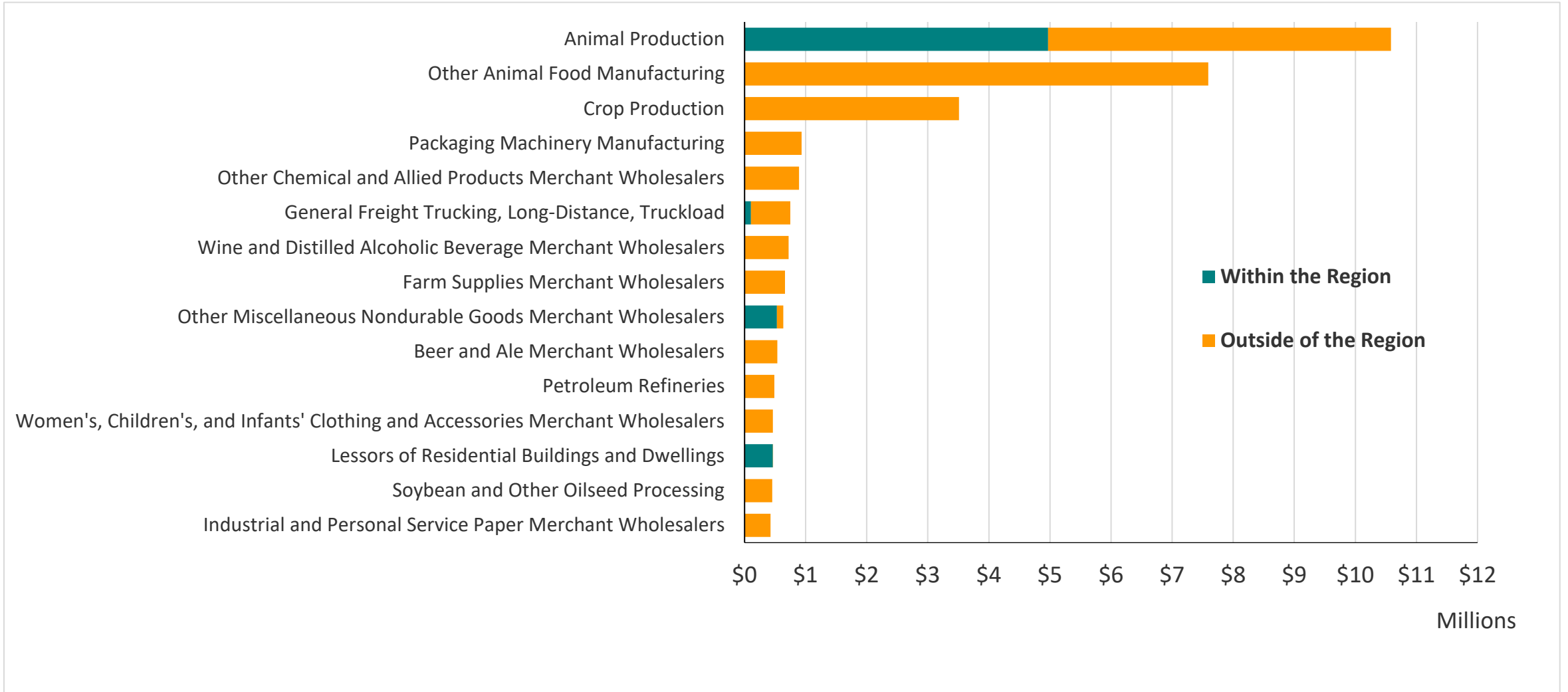


## Leakage analysis: Top 15 Industries by Inputs

Industries	Estimated Input (\$ Millions), 2021	% In-Region	% Out of Region
Animal Production	\$10.6	47.0%	53.0%
Other Animal Food Manufacturing	\$7.6	0.0%	100.0%
Crop Production	\$3.5	0.0%	100.0%
Packaging Machinery Manufacturing	\$0.9	0.0%	100.0%
Other Chemical and Allied Products Merchant Wholesalers	\$0.9	0.0%	100.0%
General Freight Trucking, Long-Distance, Truckload	\$0.8	14.0%	86.0%
Wine and Distilled Alcoholic Beverage Merchant Wholesalers	\$0.7	0.0%	100.0%
Farm Supplies Merchant Wholesalers	\$0.7	0.0%	100.0%
Other Miscellaneous Nondurable Goods Merchant Wholesalers	\$0.6	83.1%	16.9%
Beer and Ale Merchant Wholesalers	\$0.5	0.0%	100.0%
Petroleum Refineries	\$0.5	0.0%	100.0%
Women's, Children's, and Infants' Clothing and Accessories Merchant Wholesalers	\$0.5	0.0%	100.0%
Lessors of Residential Buildings and Dwellings	\$0.5	100.0%	0.0%
Soybean and Other Oilseed Processing	\$0.5	0.0%	100.0%
Industrial and Personal Service Paper Merchant Wholesalers	\$0.4	0.0%	100.0%



# Leakage analysis 2021

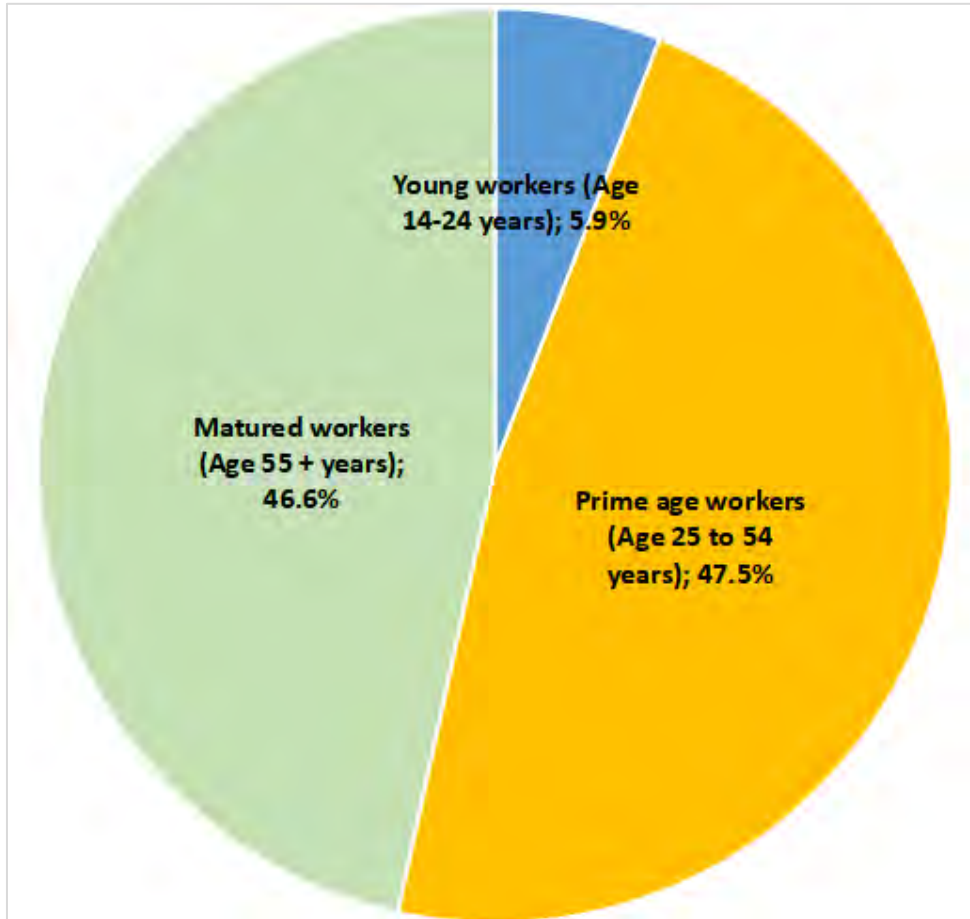




Occupations	Jobs 2021	% Change 2016-2021	% of Total Jobs in Cluster 2020	Median Hour Earnings	Entry level Education	Automation
Farmers, Ranchers, and Other Agricultural Managers	276	-1%	59.9%	\$14.49	High school diploma or equivalent	93.5
Farmworkers, Farm, Ranch, and Aquacultural Animals	25	-16%	5.5%	\$12.16	No formal educational credential	107.3
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	25	-25%	5.5%	\$10.62	No formal educational credential	113
Chief Executives	<10	-25%	0.1%	\$29.02	Bachelor's degree	82
Maintenance and Repair Workers, General	<10	206%	0.7%	\$17.94	High school diploma or equivalent	109.6
Agricultural Workers, All Other	<10	17%	1.7%	\$12.85	No formal educational credential	107.7
Coaches and Scouts	<10	21%	0.1%	\$22.03	Bachelor's degree	79.7
Merchandise Displayers and Window Trimmers	<10	Insf. Data	0.6%	\$14.04	High school diploma or equivalent	94.1
First-Line Supervisors of Mechanics, Installers, and Repairers	<10	424%	0.1%	\$34.99	High school diploma or equivalent	94
Bus and Truck Mechanics and Diesel Engine Specialists	<10	775%	0.2%	\$21.11	High school diploma or equivalent	114.6
Industrial Machinery Mechanics	<10	392%	0.6%	\$26.41	High school diploma or equivalent	109.8
Coin, Vending, and Amusement Machine Servicers and Repairers	<10	Insf. Data	0.1%	\$16.45	High school diploma or equivalent	110.2
Graders and Sorters, Agricultural Products	<10	9%	0.1%	\$15.04	No formal educational credential	122.1
First-Line Supervisors of Production and Operating Workers	<10	164%	0.5%	\$25.22	High school diploma or equivalent	88.6
Agricultural Technicians	<10	3%	0.1%	\$21.35	Associate's degree	94.8



## Worker demographics 2021



- Hispanic workers (22.0%)
- Black or African-American workers (3.0%)
- Asian workers (0%)
- White workers (68%)
- American Indian (3%)
  
- Male workers (76%)
- Female workers (24%)

- Nearly one-half (47%) of the workforce is comprised of matured (aged 55 years or more) workers.





## Shift-Share Analysis (Regional Performance) by Top Industry Sectors

Industries	Jobs 2021	National Trend 2016-2021 (A)	Industry Trend 2016-2021 (B)	Cumulative Expected Growth (C=A+B)	Actual Job Growth 2016-2021 (D)	Regional Performance, 2016-2021 (D-C)
Hotels (except Casino Hotels) and Motels	248	4	-60	-56	-28	↑ 29
Golf Courses and Country Clubs	198	3	-8	-6	8	↑ 14
Casinos (except Casino Hotels)	186	3	-80	-77	-34	↑ 43
All Other Traveler Accommodation	104	1	14	15	40	↑ 25
Independent Artists, Writers, and Performers	76	1	-14	-12	-30	-18
Recreational and Vacation Camps (except Campgrounds)	26	0	-4	-3	-3	↑ 0
All Other Amusement and Recreation Industries	23	0	-2	-2	6	↑ 8
Theater Companies and Dinner Theaters	23	0	-8	-8	-4	↑ 4
RV (Recreational Vehicle) Parks and Campgrounds	23	0	1	1	-3	-4
Other Spectator Sports	23	0	-1	0	-10	-9
Fitness and Recreational Sports Centers	22	0	-4	-3	3	↑ 7
Nature Parks and Other Similar Institutions	17	0	2	3	-12	-15
Bowling Centers	13	0	-3	-3	0	↑ 2
Radio Stations	12	0	-5	-4	-10	-6
Racetracks	<10	0	0	0	Insf. Data	↑ 0

Note: Upward arrow (↑) indicates regional competitiveness.



## Shift-Share Analysis 2021

### Industries that Outperformed

- 
- Casinos (except Casino Hotels)
  - Hotels (except Casino Hotels) and Motels
  - All Other Traveler Accommodation
  - Golf Courses and Country Clubs
  - All Other Amusement and Recreation Industries
  - Fitness and Recreational Sports Centers
  - Theater Companies and Dinner Theaters
  - Bowling Centers
  - Recreational and Vacation Camps (except Campgrounds)
  - Racetracks

### Industries that Underperformed

- 
- RV (Recreational Vehicle) Parks and Campgrounds
  - Radio Stations
  - Other Spectator Sports
  - Nature Parks and Other Similar Institutions
  - Independent Artists, Writers, and Performers



## Leakage analysis: Top 15 Industries by Inputs

Industries	Estimated Input (\$ Millions), 2021	% In-Region	% Out of Region
Corporate, Subsidiary, and Regional Managing Offices	\$2.8	6.1%	93.9%
Offices of Lawyers	\$1.2	31.1%	68.9%
Lessors of Residential Buildings and Dwellings	\$1.0	100.0%	0.0%
Offices of Real Estate Agents and Brokers	\$0.9	99.9%	0.1%
Internet Publishing and Broadcasting and Web Search Portals	\$0.8	2.5%	97.5%
Lessors of Nonresidential Buildings (except Miniwarehouses)	\$0.7	57.9%	42.1%
Other Activities Related to Real Estate	\$0.6	98.0%	2.0%
Insurance Agencies and Brokerages	\$0.6	84.1%	15.9%
Landscaping Services	\$0.6	65.5%	34.5%
Breweries	\$0.6	32.1%	67.9%
Janitorial Services	\$0.5	45.2%	54.8%
Temporary Help Services	\$0.5	33.3%	66.7%
Television Broadcasting	\$0.5	0.6%	99.4%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	\$0.5	100.0%	0.0%
Independent Artists, Writers, and Performers	\$0.4	42.2%	57.8%



# Leakage analysis 2021

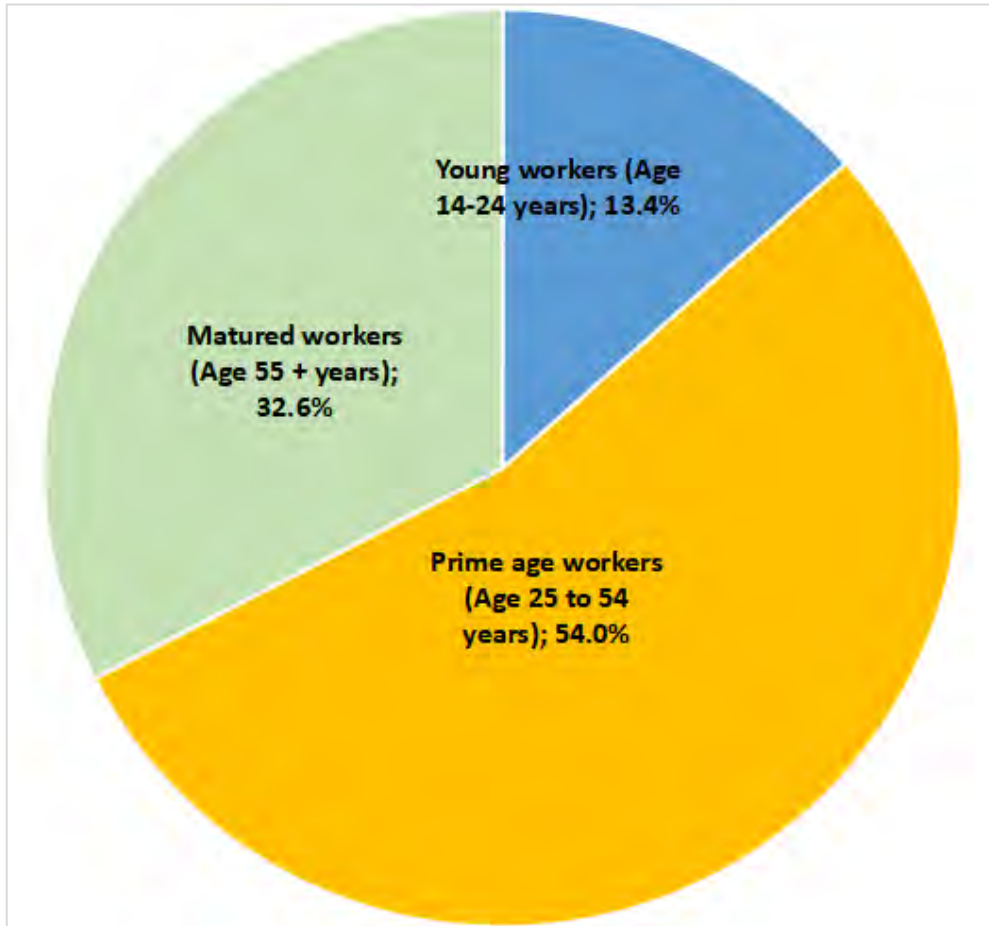




Occupations	Jobs 2021	% Change 2016-2021	% of Total Jobs in Cluster 2020	Median Hour Earnings	Entry level Education	Automation
Hotel, Motel, and Resort Desk Clerks	106	50%	10.1%	\$11.21	High school diploma or equivalent	104
Maids and Housekeeping Cleaners	97	-3%	9.2%	\$11.36	No formal educational credential	124.5
Waiters and Waitresses	66	37%	6.3%	\$11.67	No formal educational credential	129.8
Lodging Managers	61	19%	5.8%	\$18.48	High school diploma or equivalent	97.3
Landscaping and Groundskeeping Workers	49	9%	4.6%	\$15.79	No formal educational credential	129.1
Cooks, Restaurant	42	73%	4.0%	\$15.19	No formal educational credential	125
Maintenance and Repair Workers, General	36	30%	3.4%	\$17.94	High school diploma or equivalent	109.6
Amusement and Recreation Attendants	33	89%	3.1%	\$12.43	No formal educational credential	108.1
Actors	25	-13%	2.4%	\$25.62	Some college, no degree	112.5
Gambling Cage Workers	24	20326%	2.3%	\$12.59	High school diploma or equivalent	109.5
Writers and Authors	21	-23%	2.0%	\$17.34	Bachelor's degree	89.8
General and Operations Managers	20	11%	1.9%	\$42.59	Bachelor's degree	82.2
Cashiers	20	26%	1.9%	\$11.02	No formal educational credential	105.5
Musicians and Singers	19	-32%	1.8%	\$17.56	No formal educational credential	89.2
Bartenders	18	34%	1.7%	\$11.29	No formal educational credential	121.3



## Worker demographics 2021



- Hispanic workers (29.0%)
- Black or African-American workers (3.0%)
- Asian workers (3.0%)
- White workers (59.0%)
- American Indian (4.0%)
- Two or More Races (2.0%)
  
- Male workers (54%)
- Female workers (46%)

- One-third (33%) of the workforce is comprised of matured (aged 55 years or more) workers.

# Report Contributors

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This report was produced by the Purdue Center for Regional Development.



## Authors/Editors

Indraneel Kumar, Ph.D.



## Data Analysis

Indraneel Kumar, Ph.D.  
Yi Wang



## Report Design

Tyler Wright

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## Contact Us

1341 Northwestern  
Avenue  
Purdue Schowe House  
West Lafayette, IN  
47906  
**765-494-7273**  
[pcrd@purdue.edu](mailto:pcrd@purdue.edu)

