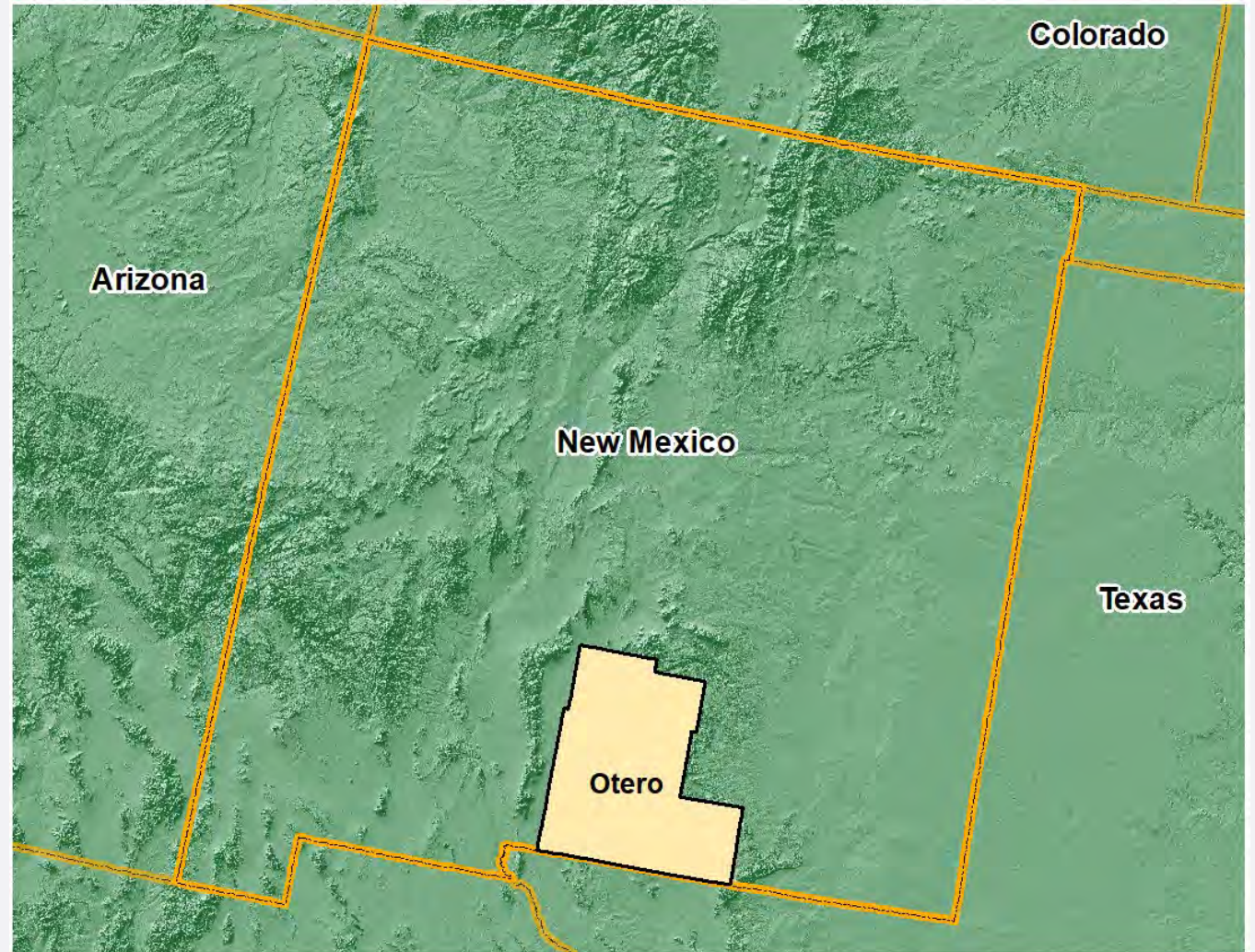


# Industry Cluster

Otero County, New Mexico

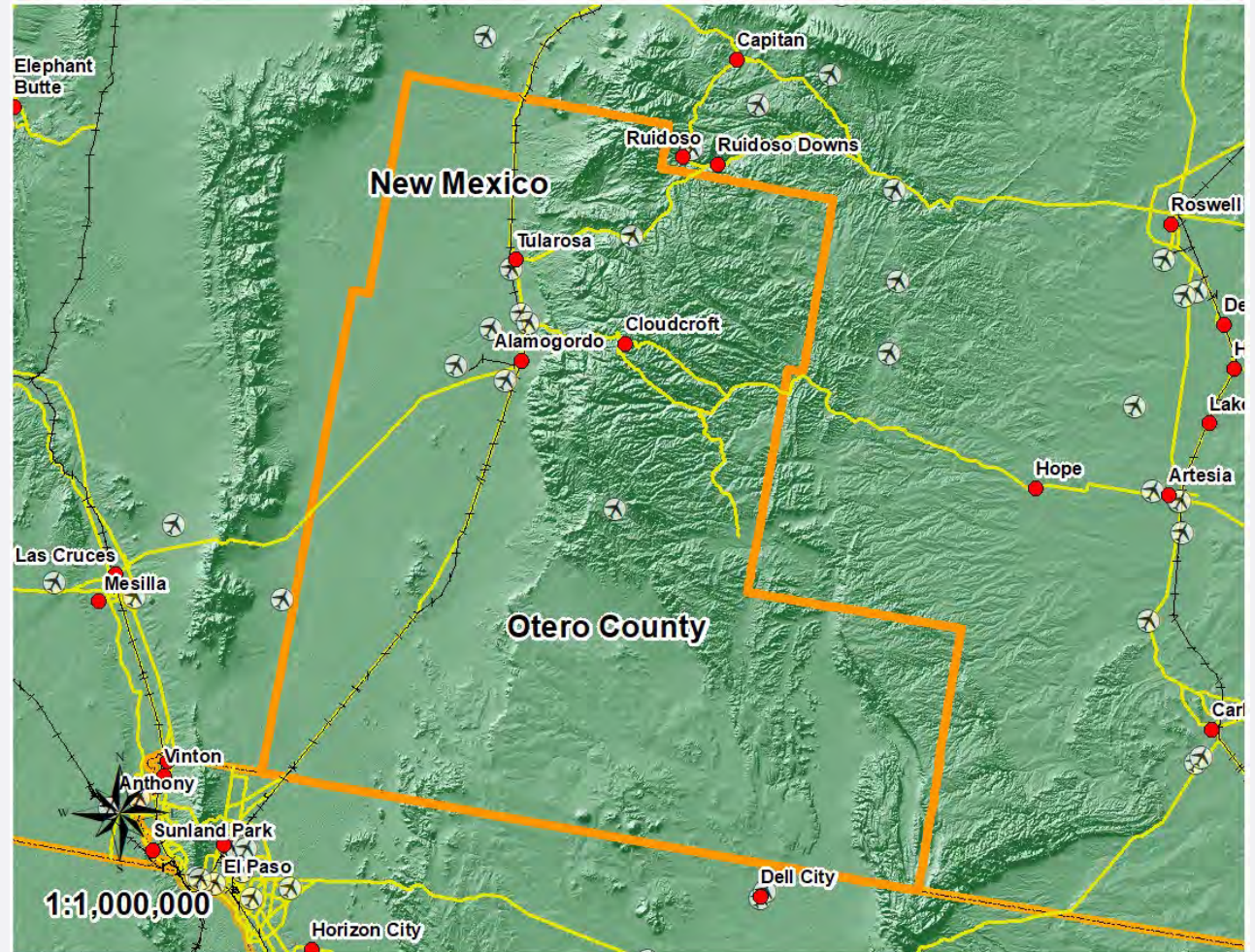


Cluster Drill-down Analysis  
February 2023



## Southeastern New Mexico Region

- Otero County





# Industry cluster drilldown

- 1. Defense/Security**
- 2. Biomedical/Bio-Technical**
- 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)
Federal Government, Military	4,424	55	-185	-131	550	↑ 680
Investigation Services	179	1	7	9	91	↑ 82
Computer Facilities Management Services	43	0	1	1	Insf. Data	↑ 38
Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)	38	3	27	30	-184	-214
Custom Computer Programming Services	26	0	2	2	15	↑ 13
Other Personal and Household Goods Repair and Maintenance	25	1	-27	-26	-43	-17
Security Systems Services (except Locksmiths)	23	0	1	1	Insf. Data	↑ 16
Transportation Equipment and Supplies (except Motor Vehicle) Merchant Wholesalers	17	0	0	0	2	↑ 2
Computer Systems Design Services	15	0	3	4	-11	-14
Other Computer Related Services	<10	0	1	1	Insf. Data	-4
Aircraft Manufacturing	<10	0	0	0	Insf. Data	↑ 0
Other Aircraft Parts and Auxiliary Equipment Manufacturing	<10	0	0	0	Insf. Data	↑ 2
Security Guards and Patrol Services	<10	2	1	3	Insf. Data	-165
Locksmiths	<10	0	0	0	Insf. Data	↑ 0

Note: Upward arrow (↑) indicates regional competitiveness.



## Shift-Share Analysis 2021

### Industries that Outperformed

- Federal Government, Military
- Investigation Services
- Computer Facilities Management Services
- Security Systems Services (except Locksmiths)
- Custom Computer Programming Services
- Transportation Equipment and Supplies (except Motor Vehicle) Merchant Wholesalers
- Other Aircraft Parts and Auxiliary Equipment Manufacturing
- Locksmiths

### Industries that Underperformed

- Other Computer Related Services
- Computer Systems Design Services
- Other Personal and Household Goods Repair and Maintenance
- Security Guards and Patrol Services
- Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)

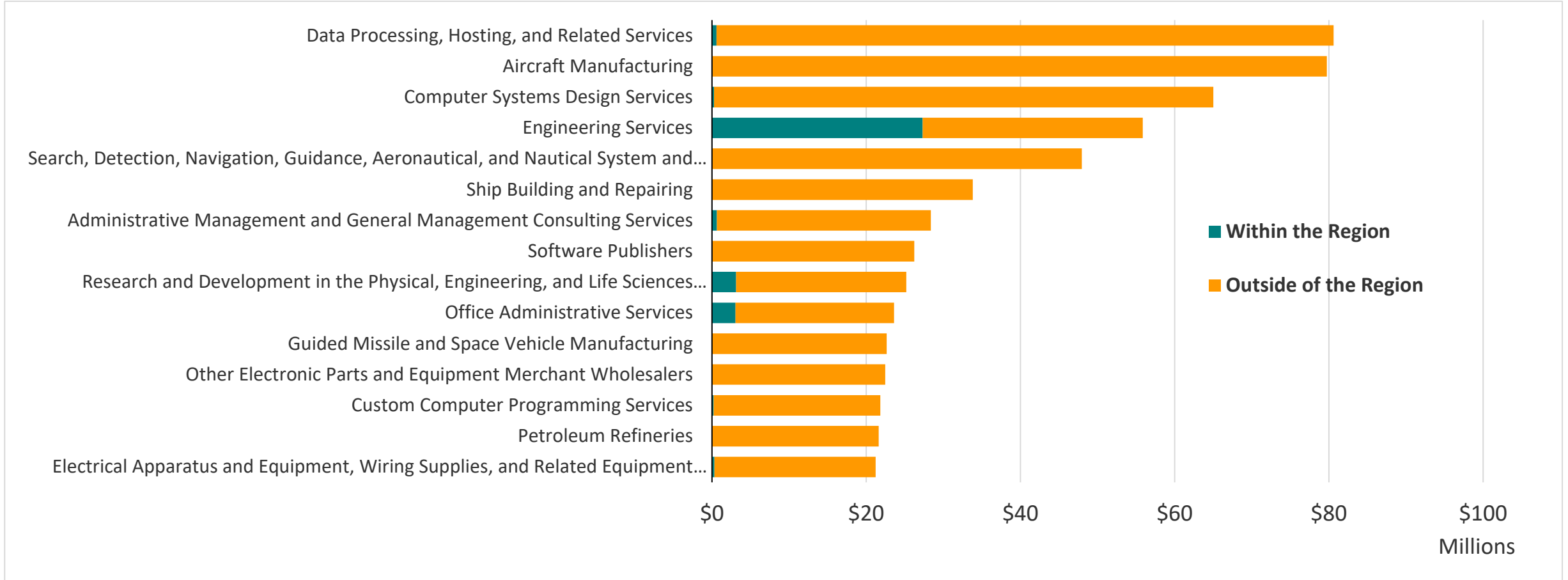


## Leakage analysis: Top 15 Industries by Inputs

Industries	Estimated Input (\$ Millions), 2021	% In-Region	% Out of Region
Data Processing, Hosting, and Related Services	\$80.6	0.7%	99.3%
Aircraft Manufacturing	\$79.7	0.0%	100.0%
Computer Systems Design Services	\$65.0	0.4%	99.6%
Engineering Services	\$55.9	48.9%	51.1%
Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing	\$47.9	0.0%	100.0%
Ship Building and Repairing	\$33.8	0.0%	100.0%
Administrative Management and General Management Consulting Services	\$28.4	2.2%	97.8%
Software Publishers	\$26.2	0.2%	99.8%
Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)	\$25.2	12.4%	87.6%
Office Administrative Services	\$23.6	12.9%	87.1%
Guided Missile and Space Vehicle Manufacturing	\$22.6	0.0%	100.0%
Other Electronic Parts and Equipment Merchant Wholesalers	\$22.5	0.0%	100.0%
Custom Computer Programming Services	\$21.8	0.9%	99.1%
Petroleum Refineries	\$21.6	0.0%	100.0%
Electrical Apparatus and Equipment, Wiring Supplies, and Related Equipment Merchant Wholesalers	\$21.2	1.5%	98.5%



# Leakage analysis 2021



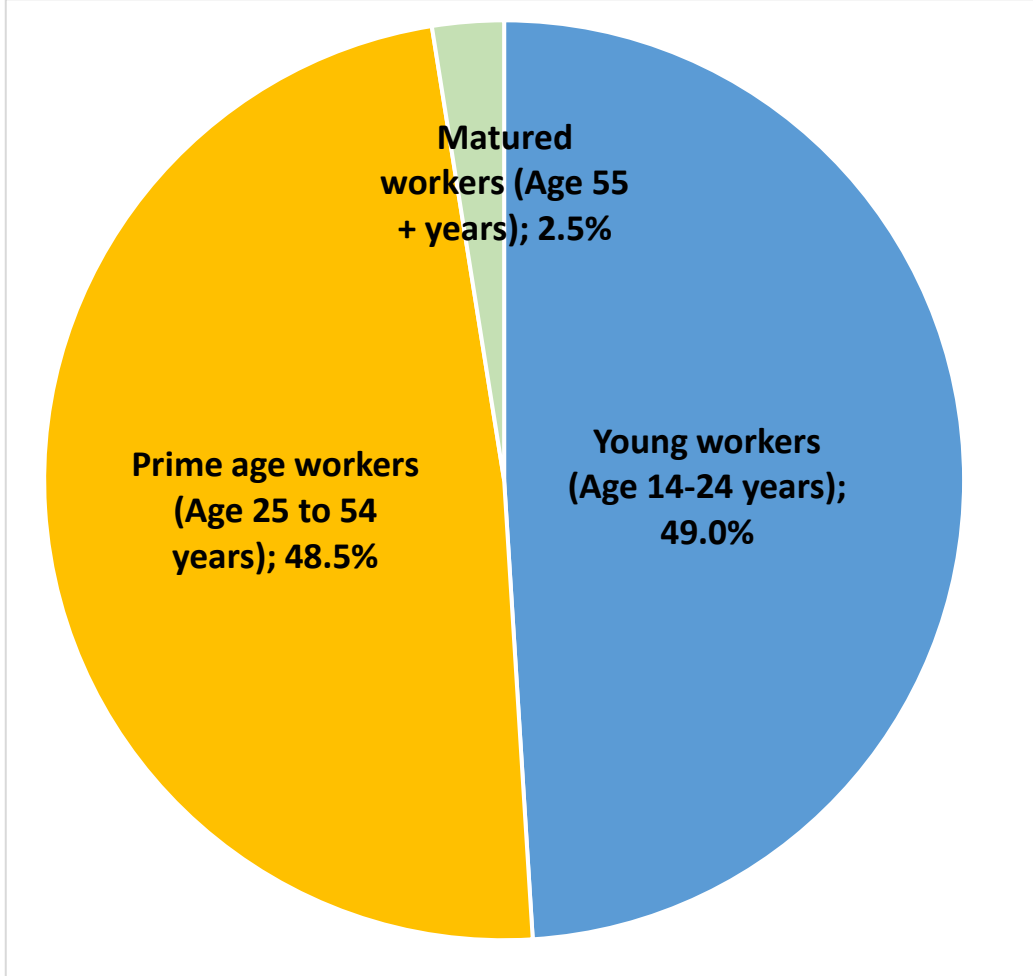




Occupations	Jobs 2021	% Change 2016-2021	% of Total Jobs in Cluster 2021	Median Hour Earnings	Entry level Education	Automation
Military-only occupations	2,311	15%	48.2%	\$17.95	N/A	N/A
Security Guards	169	-23%	3.5%	\$14.74	High school diploma or equivalent	109.8
Aircraft Mechanics and Service Technicians	141	23%	2.9%	\$37.59	Postsecondary nondegree award	101.2
Airline Pilots, Copilots, and Flight Engineers	92	21%	1.9%	\$72.90	Bachelor's degree	91.5
Human Resources Specialists	87	28%	1.8%	\$22.71	Bachelor's degree	83.8
Police and Sheriff's Patrol Officers	82	-4%	1.7%	\$23.08	High school diploma or equivalent	94.5
Maintenance and Repair Workers, General	59	15%	1.2%	\$16.53	High school diploma or equivalent	109.6
Managers, All Other	55	-19%	1.1%	\$36.11	Bachelor's degree	84.5
Logisticians	52	616%	1.1%	\$35.07	Bachelor's degree	82.1
Avionics Technicians	45	55%	0.9%	\$36.00	Associate's degree	100
First-Line Supervisors of Mechanics, Installers, and Repairers	33	0%	0.7%	\$34.02	High school diploma or equivalent	94
Project Management Specialists	32	82%	0.7%	\$37.76	Bachelor's degree	86.8
Computer Occupations, All Other	32	11%	0.7%	\$36.45	Bachelor's degree	85.5
Commercial Pilots	32	26%	0.7%	\$39.59	High school diploma or equivalent	89.6
Paramedics	32	141%	0.7%	\$22.50	Postsecondary nondegree award	83.7



## Worker demographics 2021



- Hispanic workers (20.0%)
- Black or African-American workers (7.0%)
- Asian workers (1.0%)
- White workers (58%)
- Two or more races (13%)
  
- Male workers (82%)
- Female workers (18%)

- Only (2.5%) 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)
General Medical and Surgical Hospitals	916	9	5	14	275	↑ 261
Home Health Care Services	541	7	32	38	80	↑ 41
Nursing Care Facilities (Skilled Nursing Facilities)	222	4	-48	-44	-44	↑ 0
All Other Outpatient Care Centers	129	1	31	33	38	↑ 6
Pharmacies and Drug Stores	62	1	-2	-2	19	↑ 21
Ambulance Services	56	1	-7	-5	-46	-41
Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)	38	3	27	30	-184	-214
Cosmetics, Beauty Supplies, and Perfume Stores	24	0	1	1	-2	-4
Freestanding Ambulatory Surgical and Emergency Centers	24	1	11	12	-30	-42
Diagnostic Imaging Centers	22	0	3	3	-10	-13
Food (Health) Supplement Stores	19	0	-2	-2	0	↑ 2
Residential Intellectual and Developmental Disability Facilities	<10	0	0	0	Insf. Data	↑ 2
All Other Miscellaneous Ambulatory Health Care Services	<10	0	1	1	Insf. Data	-4
Residential Mental Health and Substance Abuse Facilities	<10	0	0	0	Insf. Data	↑ 0
Medical Laboratories	<10	0	2	2	Insf. Data	-6

Note: Upward arrow (↑) indicates regional competitiveness.



## Shift-Share Analysis 2021

### Industries that Outperformed

- General Medical and Surgical Hospitals
- Home Health Care Services
- Pharmacies and Drug Stores
- All Other Outpatient Care Centers
- Residential Intellectual and Developmental Disability Facilities
- Food (Health) Supplement Stores
- Nursing Care Facilities (Skilled Nursing Facilities)
- Residential Mental Health and Substance Abuse Facilities

### Industries that Underperformed

- Cosmetics, Beauty Supplies, and Perfume Stores
- All Other Miscellaneous Ambulatory Health Care Services
- Medical Laboratories
- Diagnostic Imaging Centers
- Ambulance Services
- Freestanding Ambulatory Surgical and Emergency Centers
- Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)

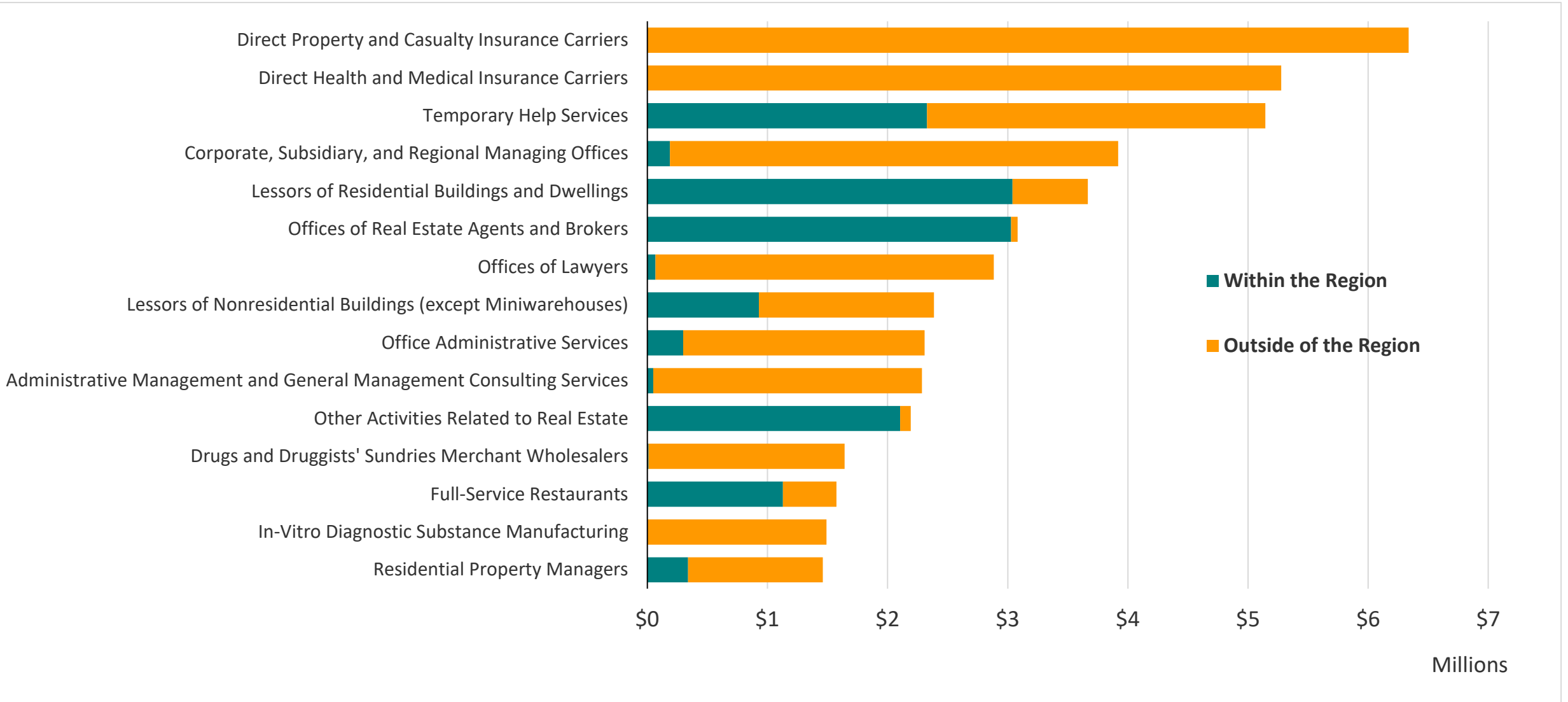


## Leakage analysis: Top 15 Industries by Inputs

Industries	Estimated Input (\$ Millions), 2021	% In-Region	% Out of Region
Direct Property and Casualty Insurance Carriers	\$6.3	0.0%	100.0%
Direct Health and Medical Insurance Carriers	\$5.3	0.0%	100.0%
Temporary Help Services	\$5.1	45.3%	54.7%
Corporate, Subsidiary, and Regional Managing Offices	\$3.9	4.8%	95.2%
Lessors of Residential Buildings and Dwellings	\$3.7	82.9%	17.1%
Offices of Real Estate Agents and Brokers	\$3.1	98.2%	1.8%
Offices of Lawyers	\$2.9	2.4%	97.6%
Lessors of Nonresidential Buildings (except Miniwarehouses)	\$2.4	38.9%	61.1%
Office Administrative Services	\$2.3	12.9%	87.1%
Administrative Management and General Management Consulting Services	\$2.3	2.2%	97.8%
Other Activities Related to Real Estate	\$2.2	96.0%	4.0%
Drugs and Druggists' Sundries Merchant Wholesalers	\$1.6	0.6%	99.4%
Full-Service Restaurants	\$1.6	71.8%	28.2%
In-Vitro Diagnostic Substance Manufacturing	\$1.5	0.0%	100.0%
Residential Property Managers	\$1.5	23.2%	76.8%



# Leakage analysis 2021

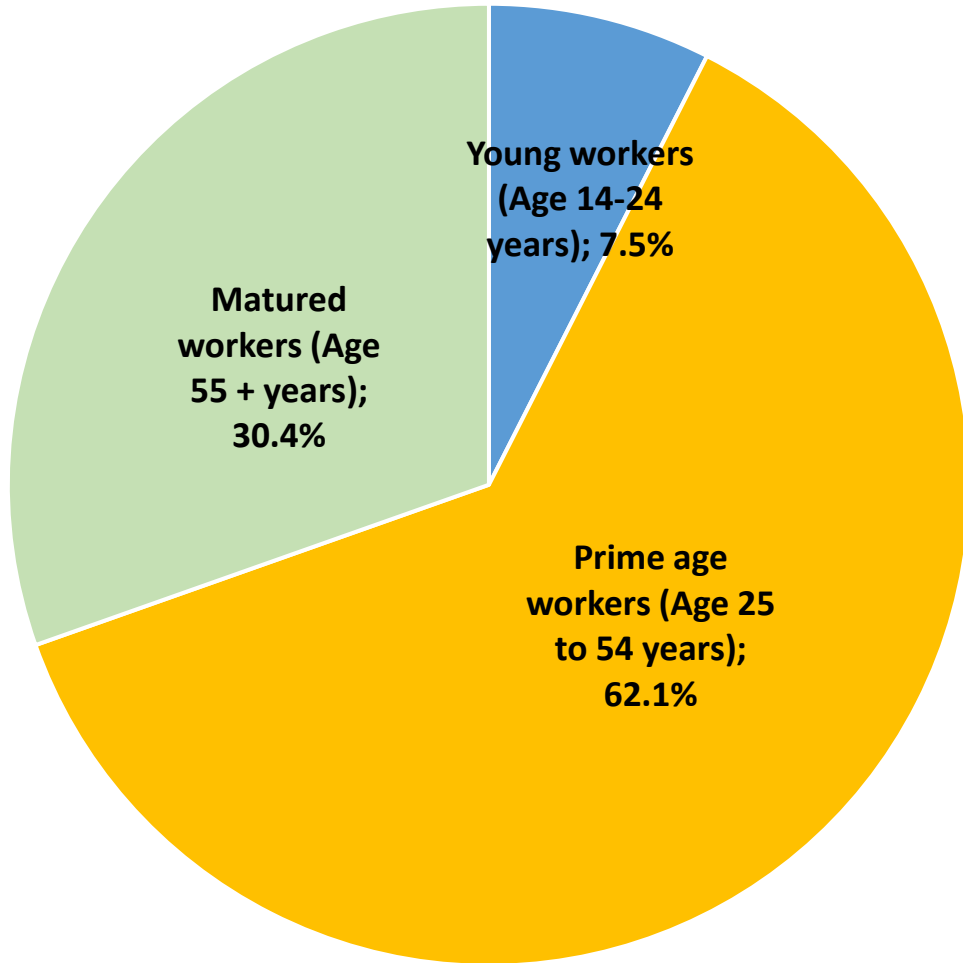




Occupations	Jobs 2021	% Change 2016-2021	% of Total Jobs in Cluster 2021	Median Hour Earnings	Entry level Education	Automation
Home Health and Personal Care Aides	411	18%	19.5%	\$10.81	High school diploma or equivalent	93.6
Registered Nurses	344	32%	16.4%	\$33.93	Bachelor's degree	85.3
Nursing Assistants	144	-20%	6.9%	\$13.33	Postsecondary nondegree award	97
Medical Assistants	64	132%	3.0%	\$14.59	Postsecondary nondegree award	97.3
Maids and Housekeeping Cleaners	56	28%	2.6%	\$10.54	No formal educational credential	124.5
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	50	-16%	2.4%	\$16.29	High school diploma or equivalent	91.4
Licensed Practical and Licensed Vocational Nurses	43	-8%	2.1%	\$26.80	Postsecondary nondegree award	84.8
Pharmacy Technicians	38	60%	1.8%	\$17.62	High school diploma or equivalent	109.9
Medical and Health Services Managers	33	28%	1.6%	\$43.67	Bachelor's degree	75.2
Radiologic Technologists and Technicians	32	46%	1.5%	\$26.49	Associate's degree	94.1
Clinical Laboratory Technologists and Technicians	30	18%	1.4%	\$21.00	Bachelor's degree	97.9
Emergency Medical Technicians	27	-57%	1.3%	\$13.34	Postsecondary nondegree award	83.7
Retail Salespersons	27	-21%	1.3%	\$12.50	No formal educational credential	93.4
Pharmacists	25	67%	1.2%	\$60.38	Doctoral or professional degree	89.1
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	24	41%	1.1%	\$12.59	No formal educational credential	122.5



## Worker demographics 2021



- Hispanic workers (40%)
- Black or African-American workers (5%)
- Asian workers (3%)
- White workers (49%)
- American Indian (1%)
  
- Male workers (24%)
- Female workers (76%)

○ Nearly one-third (30%) 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	267	4	-57	-53	6	↑ 60
Independent Artists, Writers, and Performers	80	2	-14	-12	-26	-14
Other Spectator Sports	27	0	-1	0	-5	-5
Golf Courses and Country Clubs	27	0	0	0	27	↑ 27
Radio Stations	25	1	-8	-7	-14	-7
Fitness and Recreational Sports Centers	24	1	-11	-10	-32	-22
RV (Recreational Vehicle) Parks and Campgrounds	19	0	1	1	-16	-17
Museums	15	0	-3	-3	-2	↑ 1
Promoters of Performing Arts, Sports, and Similar Events without Facilities	14	0	0	0	Insf. Data	↑ 13
Motion Picture Theaters (except Drive-Ins)	13	0	-8	-8	-5	↑ 3
All Other Amusement and Recreation Industries	13	0	-1	-1	Insf. Data	↑ 7
All Other Traveler Accommodation	11	0	3	3	-3	-6
Cable and Other Subscription Programming	11	0	0	0	11	↑ 11
Skiing Facilities	11	0	0	0	1	↑ 1
Sports Teams and Clubs	11	0	-1	-1	-1	-1

Note: Upward arrow (↑) indicates regional competitiveness.



## Shift-Share Analysis 2021

### Industries that Outperformed

- Hotels (except Casino Hotels) and Motels
- Golf Courses and Country Clubs
- Promoters of Performing Arts, Sports, and Similar Events without Facilities
- Cable and Other Subscription Programming
- All Other Amusement and Recreation Industries
- Motion Picture Theaters (except Drive-Ins)
- Skiing Facilities
- Museums

### Industries that Underperformed

- Sports Teams and Clubs
- Other Spectator Sports
- All Other Traveler Accommodation
- Radio Stations
- Independent Artists, Writers, and Performers
- RV (Recreational Vehicle) Parks and Campgrounds
- Fitness and Recreational Sports Centers

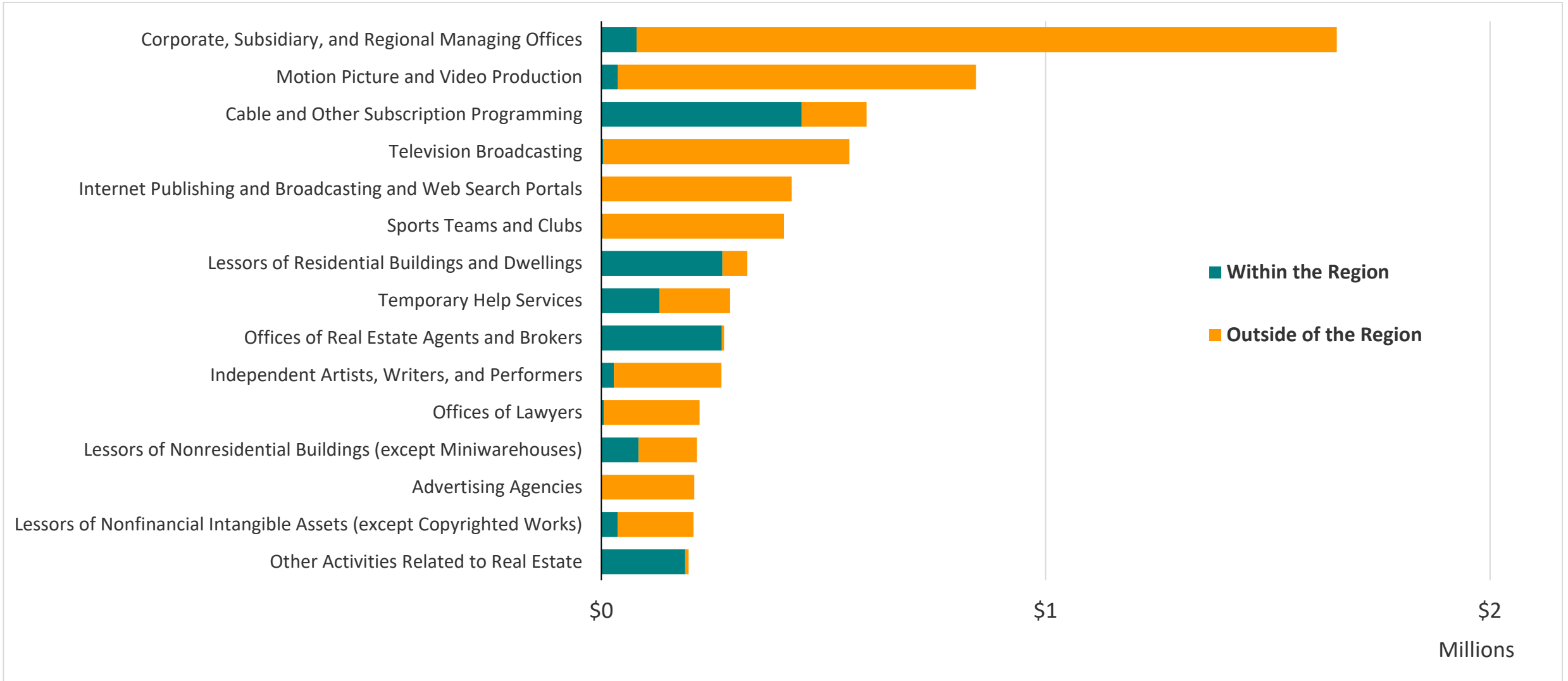


## Leakage analysis: Top 15 Industries by Inputs

Industries	Estimated Input (\$ Millions), 2021	% In-Region	% Out of Region
Corporate, Subsidiary, and Regional Managing Offices	\$1.7	4.8%	95.2%
Motion Picture and Video Production	\$0.8	4.4%	95.6%
Cable and Other Subscription Programming	\$0.6	75.5%	24.5%
Television Broadcasting	\$0.6	0.8%	99.2%
Internet Publishing and Broadcasting and Web Search Portals	\$0.4	0.1%	99.9%
Sports Teams and Clubs	\$0.4	0.5%	99.5%
Lessors of Residential Buildings and Dwellings	\$0.3	82.9%	17.1%
Temporary Help Services	\$0.3	45.3%	54.7%
Offices of Real Estate Agents and Brokers	\$0.3	98.2%	1.8%
Independent Artists, Writers, and Performers	\$0.3	10.4%	89.6%
Offices of Lawyers	\$0.2	2.4%	97.6%
Lessors of Nonresidential Buildings (except Miniwarehouses)	\$0.2	38.9%	61.1%
Advertising Agencies	\$0.2	0.1%	99.9%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	\$0.2	17.8%	82.2%
Other Activities Related to Real Estate	\$0.2	96.0%	4.0%



# Leakage analysis 2021

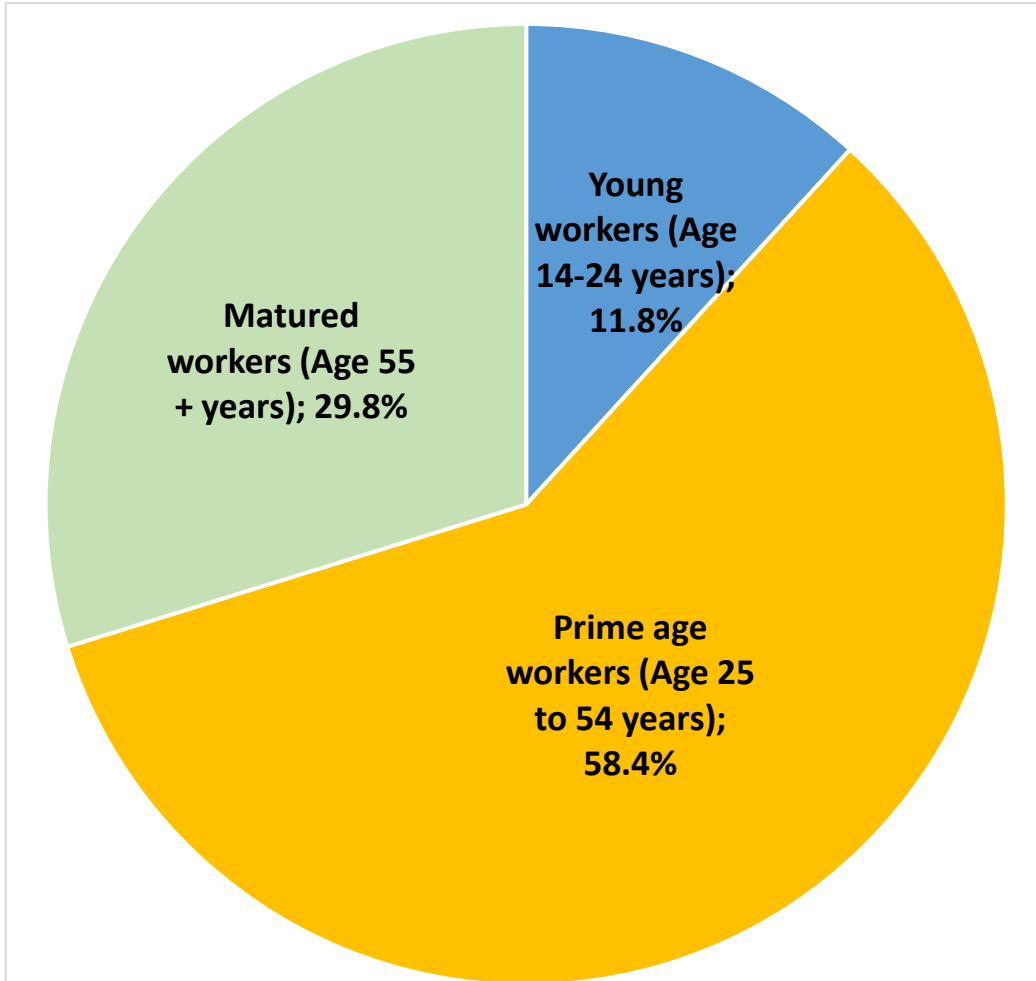




Occupations	Jobs 2021	% Change 2016-2021	% of Total Jobs in Cluster 2021	Median Hour Earnings	Entry level Education	Automation
Hotel, Motel, and Resort Desk Clerks	77	29%	12.4%	\$10.53	High school diploma or equivalent	104
Maids and Housekeeping Cleaners	66	-18%	10.6%	\$10.54	No formal educational credential	124.5
Lodging Managers	51	33%	8.2%	\$21.09	High school diploma or equivalent	97.3
Writers and Authors	24	-25%	3.8%	\$17.28	Bachelor's degree	89.8
Musicians and Singers	22	-28%	3.5%	\$17.47	No formal educational credential	89.2
Maintenance and Repair Workers, General	18	12%	3.0%	\$16.53	High school diploma or equivalent	109.6
Waiters and Waitresses	16	-13%	2.5%	\$10.64	No formal educational credential	129.8
Fine Artists, Including Painters, Sculptors, and Illustrators	15	5%	2.5%	\$8.27	Bachelor's degree	89.2
Landscaping and Groundskeeping Workers	13	60%	2.1%	\$13.16	No formal educational credential	129.1
Exercise Trainers and Group Fitness Instructors	11	-9%	1.8%	\$12.61	High school diploma or equivalent	84.4
General and Operations Managers	11	16%	1.8%	\$40.68	Bachelor's degree	82.2
Producers and Directors	10	98%	1.7%	\$44.97	Bachelor's degree	89.1
Art Directors	10	64%	1.6%	\$14.14	Bachelor's degree	81.6
Broadcast Announcers and Radio Disc Jockeys	10	-48%	1.6%	\$13.35	Bachelor's degree	92.3
Athletes and Sports Competitors	<10	82%	0.7%	\$22.18	No formal educational credential	101.8



## Worker demographics 2021



- Hispanic workers (21%)
- Black or African-American workers (4%)
- Asian workers (6%)
- White workers (63%)
- American Indian (3%)
- Two or More Races (3%)
  
- Male workers (50%)
- Female workers (50%)

○ Nearly one-third (30%) of the workforce is comprised of mated (aged 55 years or more) workers.

# Report Contributors

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