REGIONAL SNAPSHOT

North Central New Mexico Tribal Group, New Mexico

PURDUE UNIVERSITY

Center for Regional Development
Advancing Collaboration : Energizing Regions

Table of contents

01
overview

North Central New Mexico Tribal Group, NM

What is a regional snapshot?

North Central New Mexico Tribal Group Region

The North Central New Mexico Tribal Group Region is comprised of three counties in northern New Mexico. Interstate I-25 passes through southern part of the region connecting to I-40. State Highway 64 passes through the northern part of the region connecting to I-25 to the east.

- Rio Arriba
- Santa Fe
- Taos

Rio Arriba

Taos

Santa Fe

● Pueblo
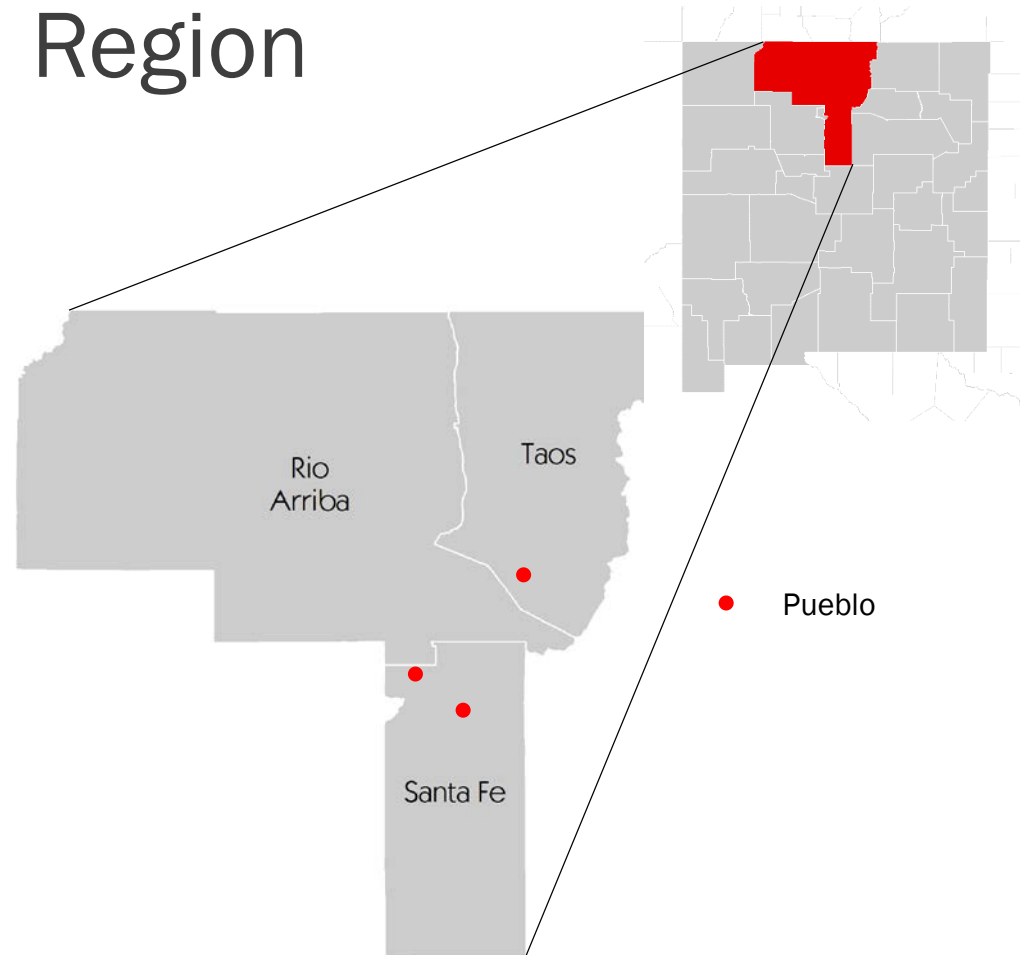
What is a regional snapshot?

What is the snapshot?

This snapshot is a demographic and economic assessment of the North Central NM Tribal Group Region in New Mexico. Using county-level data, PCRD analyzed a number of indicators to gauge the overall economic performance of the North Central NM Tribal Group Region in comparison to the rest of the state.

What is its purpose?

The snapshot is intended to inform the region's leaders, organizations and residents of the key attributes of the region's population and economy. In particular, it takes stock of the region's important assets and challenges. With such data in hand, regional leaders and organizations are in a better position to invest in the mix of strategies that will spur the growth of the economy and provide a higher quality of life for residents of the region.

What are its focus areas?

PCRD secured and analyzed recent data from both public and private sources to generate the snapshot. In order to build a more comprehensive picture of the region, the report presents information under four key categories.

- Demography
- Human Capital
- Labor Force
- Industry & Occupation

When appropriate or relevant, the report compares information on the region with data on the remainder of the state. By so doing, the region is better able to determine how well it is performing relative to the state on a variety of important metrics.
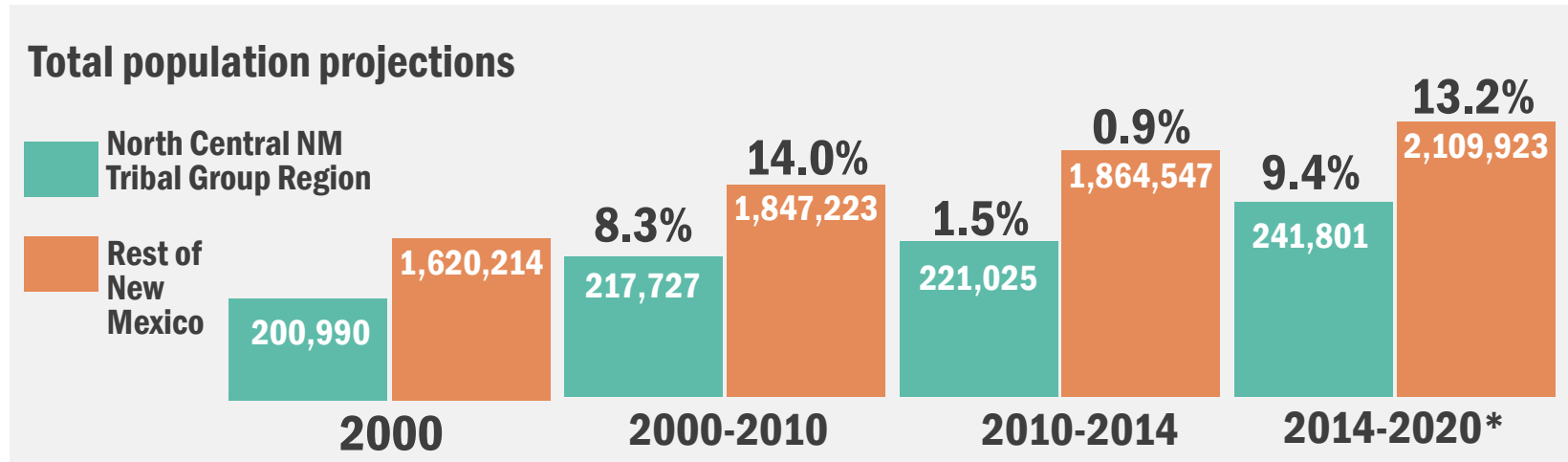
02
demography

Population change

Age structure

Income and poverty

Population change

Total population projections

North Central NM Tribal Group Region

Rest of New Mexico

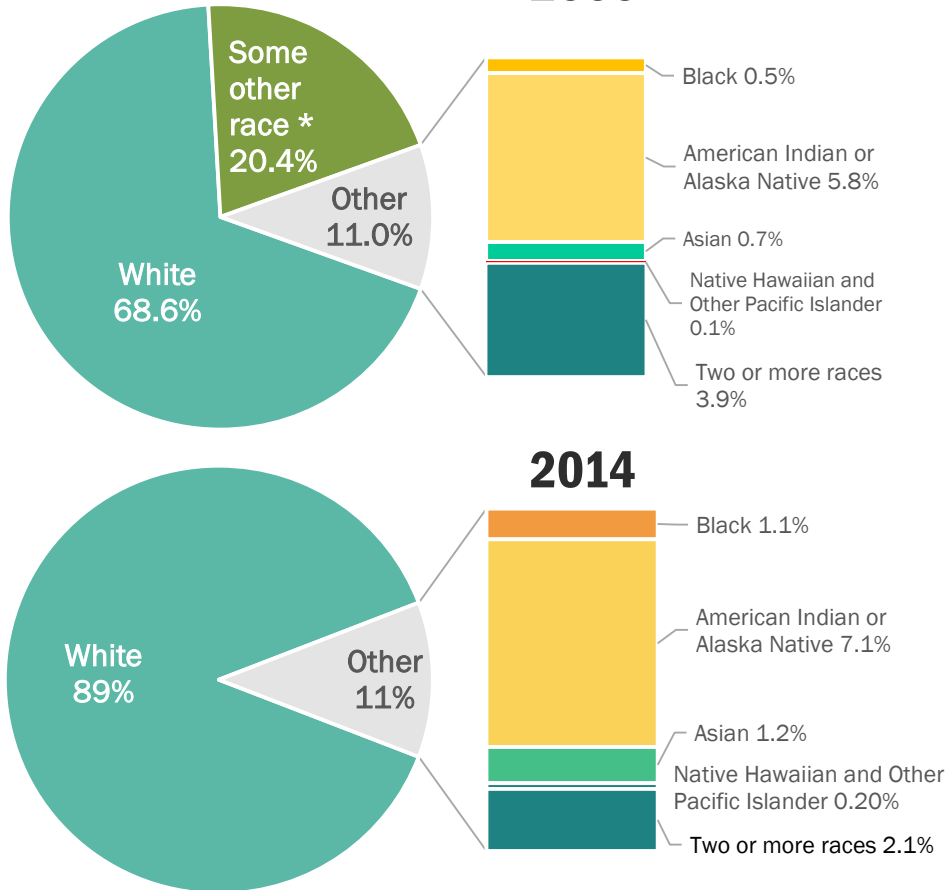|	2000	2000-2010	2010-2014	2014-2020*
North Central NM	200,990	8.3% 217,727	1.5% 221,025	9.4% 241,801
Rest of New Mexico	1,620,214	14.0% 1,847,223	0.9% 1,864,547	13.2% 2,109,923

Questions:

- How does the region's population trend compare to that of the state?

- What may be some of the elements driving the trends in the region? In the state?

- What strengths or challenges might these trends present?
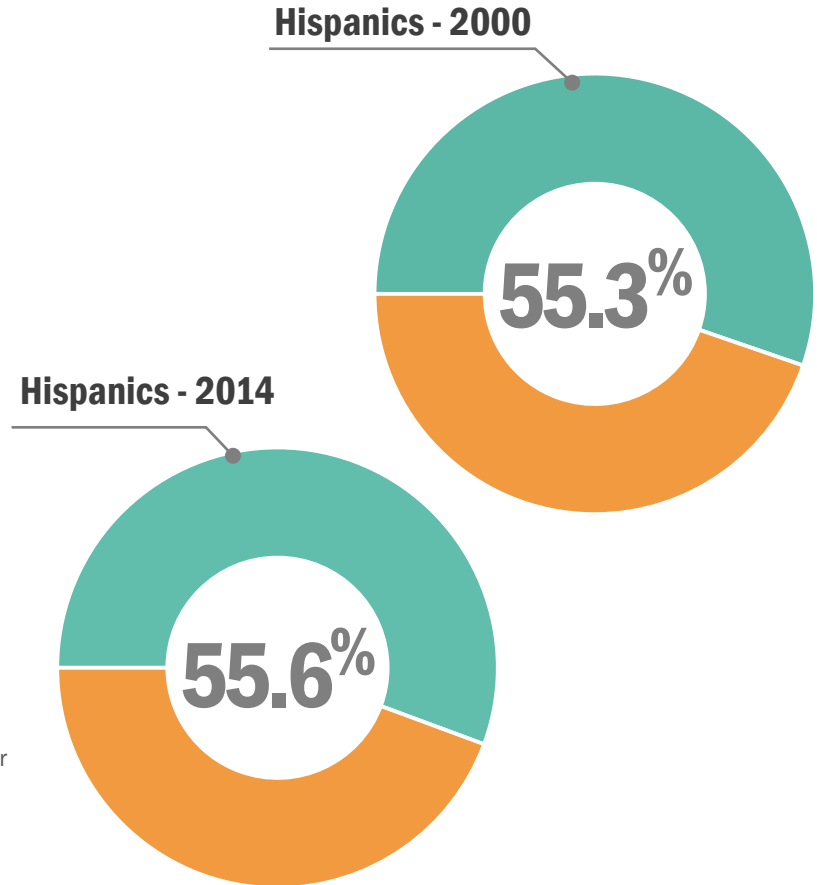
Source: Census 2000, Census 2010 and 2014 estimates as per July 1st population estimates and 2020 Population Projection by The Bureau of Business and Economic Research (BBER) at the University of New Mexico, http://bber.unm.edu 7

Demography

Race

2000

White 68.6%

Some other race * 20.4%

Other 11.0%

- Black 0.5%
- American Indian or Alaska Native 5.8%
- Asian 0.7%
- Native Hawaiian and Other Pacific Islander 0.1%
- Two or more races 3.9%

2014

White 89%

Other 11%

- Black 1.1%
- American Indian or Alaska Native 7.1%
- Asian 1.2%
- Native Hawaiian and Other Pacific Islander 0.20%
- Two or more races 2.1%

Ethnicity

Hispanics - 2000

55.3%

Hispanics - 2014

55.6%

*Note: "Some other race" category was removed by Census Bureau in subsequent years

section 02

Population Age Structure, 2000

A visual presentation of the age distribution of the population (in percent)

Age	Rest of State	NCNM Tribal Group
80+	2.8	2.6
70-79	5.5	4.9
60-69	7.4	7.8
50-59	10.8	13.7
40-49	14.8	16.9
30-39	14.2	14.8
20-29	13.2	11.8
10-19	16.3	14.4
00-09	15.2	13.2

Percent of Population

section 02

Source: 2000 Decennial Census, U.S. Census Bureau
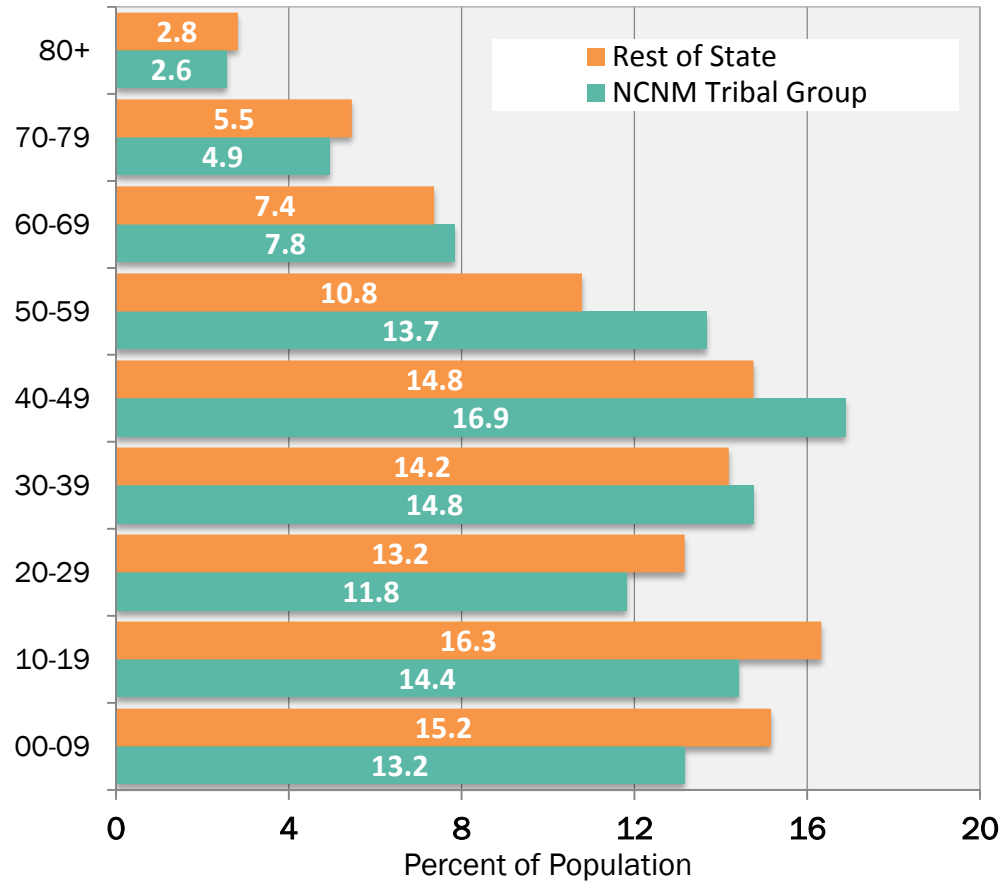
Population Age Structure, 2014

A visual presentation of the age distribution of the population (in percent)

Age	Rest of State	NCNM Tribal Group
80+	3.6	4.0
70-79	6.2	8.1
60-69	10.9	15.6
50-59	13.3	15.2
40-49	11.7	12.3
30-39	12.6	11.3
20-29	14.4	11.0
10-19	13.6	11.5
00-09	13.7	11.0

Percent of Population
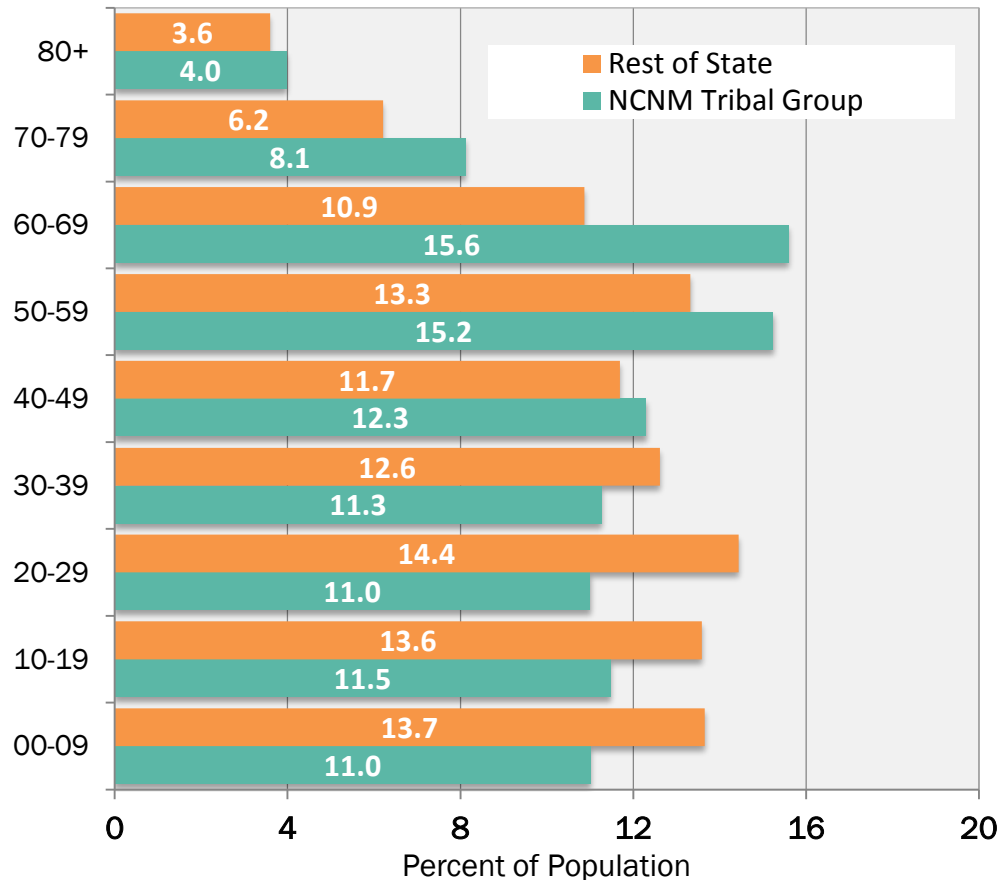
Questions:

- Is the region experiencing an aging of its population? How does this compare to the rest of the state?

- Is there a sizable number of people of prime working age (20-49 years of age) in the region?

- Is the youth population (under 20 years old) growing or declining?

- What are the implications of the region's age structure for the economic development efforts of the region?

Source: 2014 Population Estimates, U.S. Census Bureau

Income and poverty

	2003	2008	2013
Total Population in Poverty	14.5%	14.1%	20.6%
Minors (Age 0-17) in Poverty	20.7%	20.6%	29.6%
Real Median Household Income* ($ 2013)	$48,161	$ 52,741	$46,174

Questions:

- Is the poverty rate for individuals in the county getting better or worse?

- Is poverty for minors in the county lower or higher than the overall poverty rate for all individuals? Why?

- Has real median income (adjusted for inflation) improved or worsened over the 2003 to 2013 time period? What may be reasons for these changes?

section 02

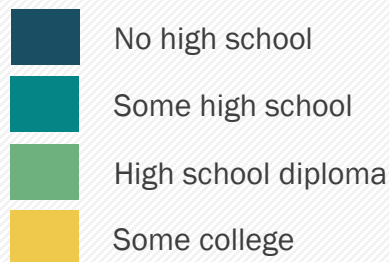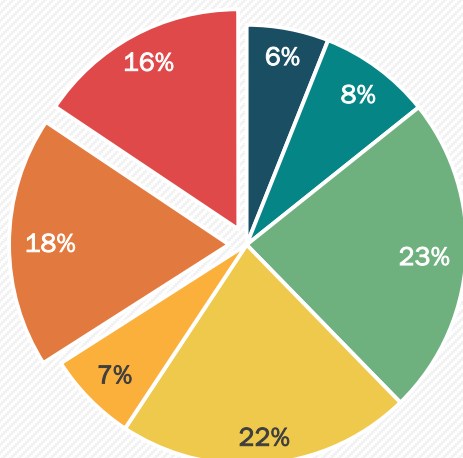* Note: Regional Median Household income is the population-weighted average of median household income values across the North Central NM Tribal Group Region counties.

03
human
capital

Educational attainment

Graduation rates

Patents

Educational attainment, 2013

North Central NM Tribal Group Region

North Central NM Tribal Group Region pie chart:
- 6% No high school
- 8% Some high school
- 23% High school diploma
- 22% Some college
- 7% Associate's degree
- 18% Bachelor's degree
- 16% Graduate degree

Rest of New Mexico

Rest of New Mexico pie chart:
- 8% No high school
- 9% Some high school
- 27% High school diploma
- 24% Some college
- 8% Associate's degree
- 14% Bachelor's degree
- 10% Graduate degree

Legend:
- No high school
- Some high school
- High school diploma
- Some college
- Associate's degree
- Bachelor's degree
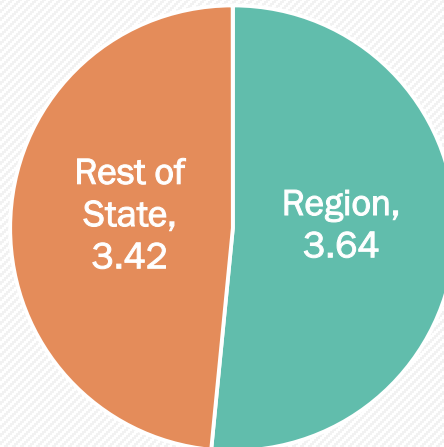- Graduate degree

Questions:

- What proportion of the adult population in the region has only a high school education?

- How many are college graduates (bachelors degree or higher)?

- How does the educational profile of the region compare to that of the rest of the state?

- What are the implications of the educational profile of the region in terms of the region's economic opportunities or workforce challenges?

section 03

Patents

Patents per 10,000 Jobs
2001-2013

From 2001 to 2013, North Central NM Tribal Group counties were issued patents at a rate of 3.64 per 10,000 jobs, while the remaining New Mexico counties garnered 3.42 patents per 10,000 jobs.

Rest of State, 3.42 — Region, 3.64

Patents per 10,000 residents
2001-2013

Rest of State, 1.79 — Region, 2.05

From 2001 to 2013, 2.05 patents per 10,000 residents were issued in North Central NM Tribal Group counties. The Rest of New Mexico amassed 1.79 patents per 10,000 residents.
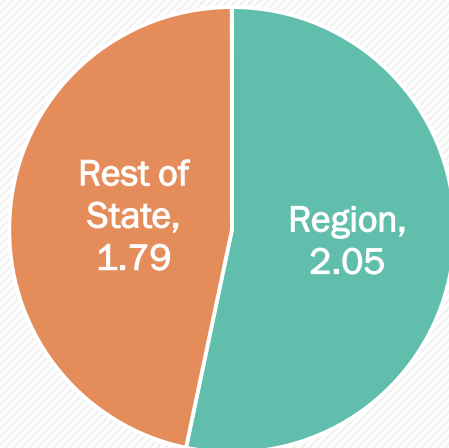
Patenting trends are an important indicator of the level of innovation in a region.

Commercializing this innovation can lead to long-term growth for regional economies.

Questions:

- How does the region's patent rate compare to that of the rest of the state?

- How have rates changed over time?

- What might this data suggest for the future of the region?

Source: U.S. Patent and Trademark Office, Census, BEA, and EMSI

section 03

*Note: Patent origin is determined by the residence of the first-named inventor. Since a number of workers commute into the region, the number of patents produced in the North Central NM Tribal Group Region could be high. However, among residents of the region, patent production is relatively low.

04
labor force

Unemployment rates
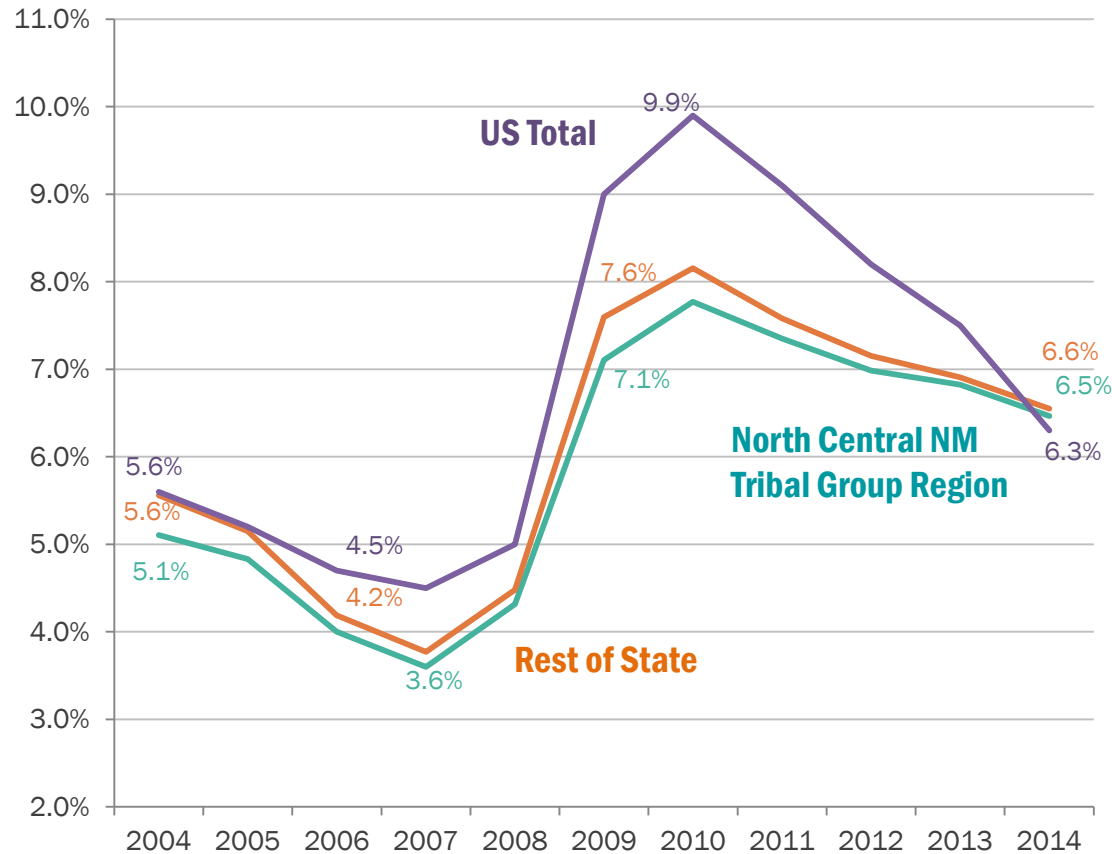
Questions:

- How does the region's unemployment rate compare to the rest of the state and nation?

- How does the region's unemployment peak and post-2009 recovery compare to the state and nation?

- What might this suggest for the region's economic future?

section 04

Earnings per worker in 2014

Questions:

- How does the region's average earnings compare to that of the rest of the state?

- What might be some driving factors for the differences?

- Do these represent potential strengths or challenges for the region?

NOTE: Earnings include wages, salaries, supplements and earnings from partnerships and proprietorships

Legend:
- **North Central NM Tribal Group Region**
- **Rest of State**

Chart values:
- $60,000
- $45,000
- $30,000
- $15,000
- $0

North Central NM Tribal Group Region: **$43,536**
Rest of State: **$45,211**

Average earnings

section 04
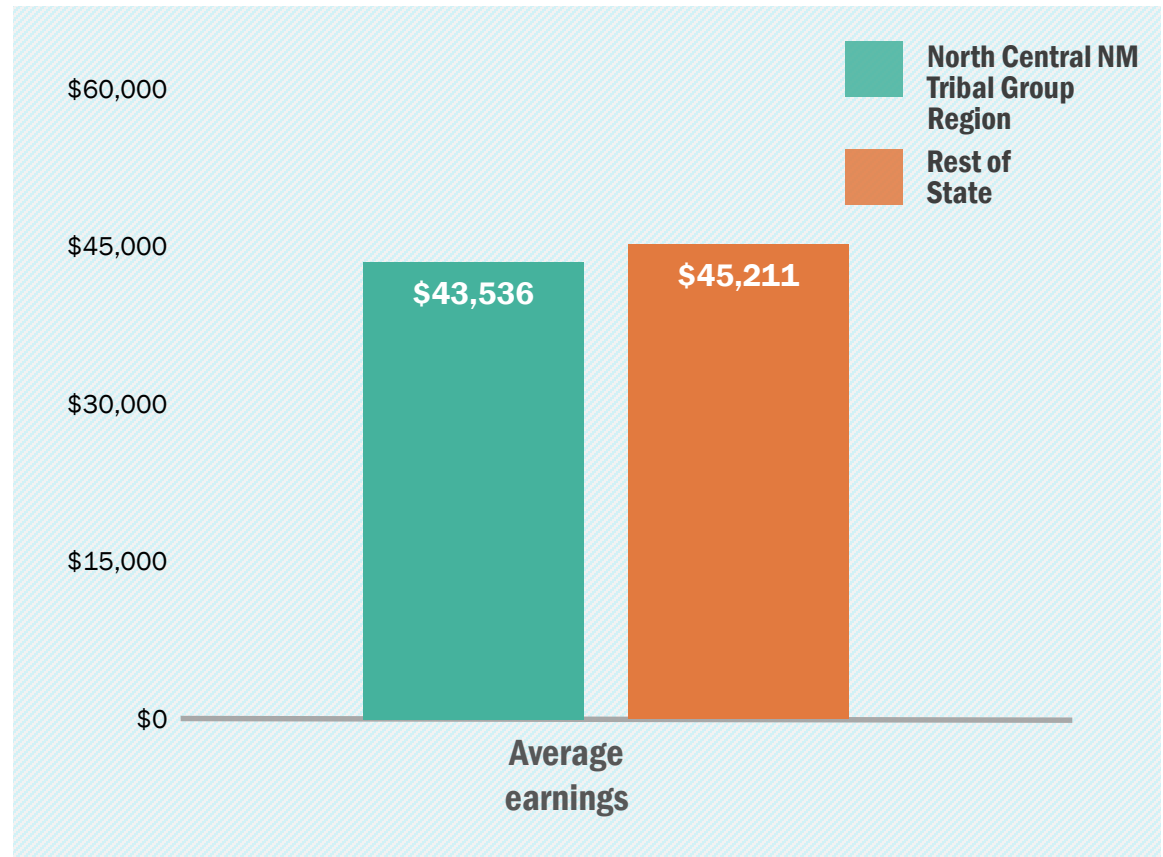
Journey to Work

In-Commuters

25,353

Same Work/Home

54,464

Out-Commuters

27,005
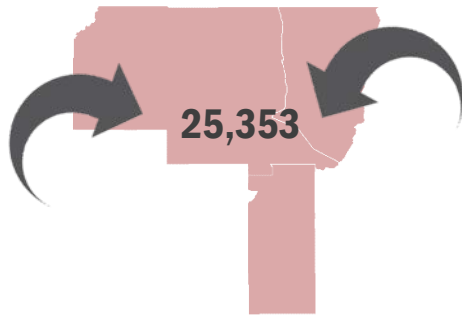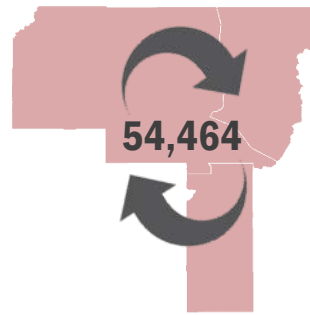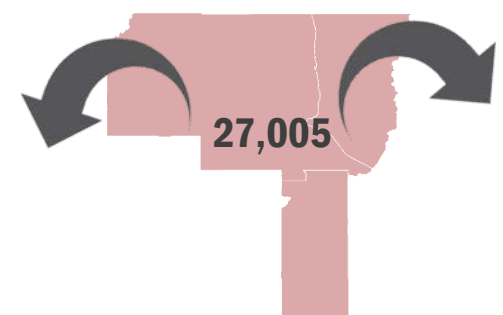
Population	2013 Jobs	Proportion
Employed in Region	79,817	100.0%
Employed in Region but Living Outside	25,353	31.8%
Employed and Living in Region	54,464	68.2%

Population	2013 Jobs	Proportion
Region Residents	81,469	100.0%
Employed Outside Region but Living in Region	27,005	33.1%
Employed and Living in Region	54,464	66.9%

Questions:
- How many people employed in the region actually reside outside the region? How many who live in the region commute to jobs outside the region?
- What are the implications for the region's economic development efforts?

section 04

05
industry and occupation

Establishments

Components of Change for Establishments 2000-2011

Establishments Launched	20,402
Establishments Closed	13,381
Net Change	7,021
Net Migration (Establishments moving into minus Establishments moving out of the region)	555
Total Change	7,576
Percent Change	54.5%

An establishment is a physical business location.

Branches, standalones and headquarters are all considered types of establishments.

Definition of Company Stages

0 Self-employed

1 2-9 employees

2 10-99 employees

3 100-499 employees

4 500+ employees

section 05

Establishments

Number of Establishments by Company Stages

Stage	2000		2011	
	Establishments	Proportion	Establishments	Proportion
Stage 0	4,243	30.5%	7,560	35.2%
Stage 1	7,744	55.7%	11,895	55.4%
Stage 2	1,784	12.8%	1,851	8.6%
Stage 3	121	0.9%	161	0.7%
Stage 4	10	0.1%	11	0.1%
Total	13,902	100.0%	21,478	100.0%

Questions:

- What stage businesses have shaped the region's economic growth in the last 10 years?

- Which ones are growing or declining the most?

- Which stage of establishments are likely to shape the region's future economic growth?

section 05

Establishments

Number of Jobs by Company Stages

Year	2000	2011	% Change
Stage 0	4,243	7,560	78.2%
Stage 1	27,885	35,730	28.1%
Stage 2	43,626	47,301	8.4%
Stage 3	20,763	29,664	42.9%
Stage 4	7,687	10,306	34.1%
Total	104,204	130,561	25.3%

Sales ($ 2013) by Company Stages

Year	2000	2011	% Change
Stage 0	$558,184,439	$545,783,770	-2.2%
Stage 1	$3,834,741,231	$2,876,953,408	-25.0%
Stage 2	$5,496,520,151	$3,801,224,539	-30.8%
Stage 3	$1,564,794,315	$1,679,355,871	7.3%
Stage 4	$267,886,918	$383,822,056	43.3%
Total	$11,722,127,053	$9,287,139,643	-20.8%

Questions:
- What establishments are the most numerous based on company stages?

- What stages have experienced the largest growth? The greatest decline?

- What company stage employs the largest number of people?

- What stage captures the most sales?

- Which ones have experienced the greatest percentage loss over the 2000-11 period?

section 05

Top five industry sector employment growth

NAICS	Description	2009 Jobs	2014 Jobs	Change	Change (%)	State Change (%)
11	Crop and Animal Production	2,507	3,000	493	19.7%	13.3%
52	Finance and Insurance	4,049	4,489	440	10.9%	8.8%
72	Accommodation and Food Services	11,563	12,193	630	5.4%	6.7%
53	Real Estate and Rental and Leasing	5,528	5,792	264	4.8%	7.3%
62	Health Care and Social Assistance	13,611	14,138	527	3.9%	10.7%

Questions:
- What regional industry sectors have seen the greatest growth?
- Did they grow at the same rate as the state?
- What factors are causing the growth?

section 05

Source: EMSI Class of Worker 2014.4 (QCEW, non-QCEW, self-employed and extended proprietors)   23

Top ten industry sector employment decline

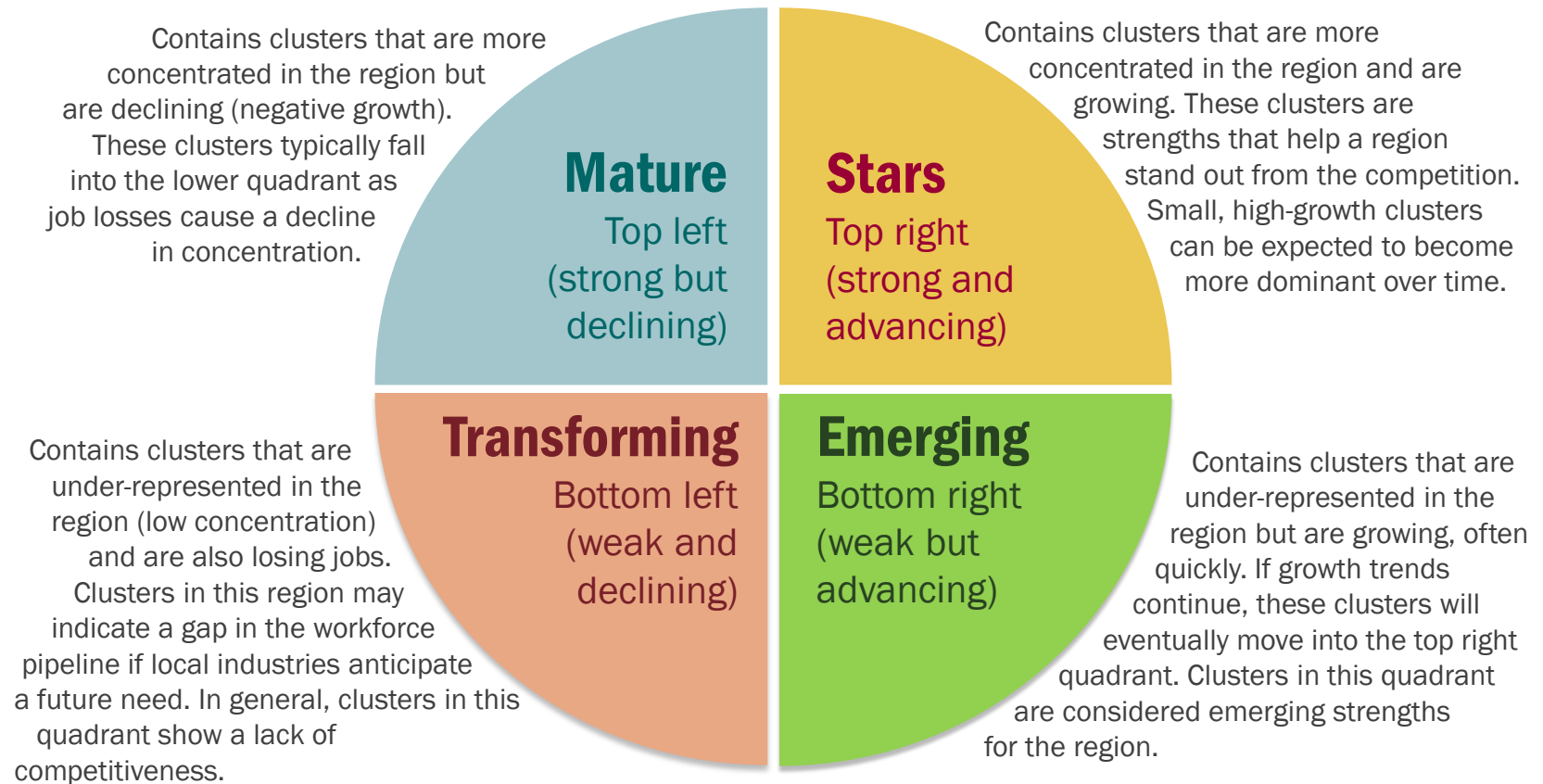| NAICS	Description	2009 Jobs	2014 Jobs	Change	Change (%)	State Change (%)
55	Management of Companies and Enterprises	331	252	-79	-24%	-2.3%
21	Mining, Quarrying, and Oil and Gas Extraction	764	686	-78	-10%	43.2%
81	Other Services (except Public Administration)	7,093	6,386	-707	-10%	0.7%
23	Construction	6,990	6,300	-690	-10%	-12.4%
22	Utilities	452	412	-40	-9%	-1.3%
56	Administrative and Support and Waste Management and Remediation Services	4,667	4,301	-366	-8%	-1.6%
54	Professional, Scientific, and Technical Services	8,068	7,483	-585	-7%	-5.7%
90	Government	26,992	25,149	-1,843	-7%	-1.3%
48	Transportation and Warehousing	1,148	1,111	-37	-3%	7.4%
51	Information	1,871	1,833	-38	-2%	-2.4%

Questions:
- How does the industry sector make-up of the region compare to the rest of the state?
- Which industry sectors are growing and declining the most in employment?

section 05

How to interpret cluster data results

The graph's four quadrants tell a different story for each cluster.

Contains clusters that are more concentrated in the region but are declining (negative growth). These clusters typically fall into the lower quadrant as job losses cause a decline in concentration.

Contains clusters that are more concentrated in the region and are growing. These clusters are strengths that help a region stand out from the competition. Small, high-growth clusters can be expected to become more dominant over time.

Mature
Top left
(strong but declining)

Stars
Top right
(strong and advancing)

Transforming
Bottom left
(weak and declining)

Emerging
Bottom right
(weak but advancing)

Contains clusters that are under-represented in the region (low concentration) and are also losing jobs. Clusters in this region may indicate a gap in the workforce pipeline if local industries anticipate a future need. In general, clusters in this quadrant show a lack of competitiveness.

Contains clusters that are under-represented in the region but are growing, often quickly. If growth trends continue, these clusters will eventually move into the top right quadrant. Clusters in this quadrant are considered emerging strengths for the region.

Modified from: http://www.charlestonregionaldata.com/bubble-chart-explanation/   25

Distribution of clusters in the Region by quadrants

Industry cluster analysis

Mature Clusters

Arts, Ent., Rec. & Visitor Industries (**2.0**; ,9,888)

Mining (**1.37**; 471)

Star Clusters

Glass & Ceramics (**1.05**; 209)

Level of Specialization

Percent Growth in Specialization

Transforming Clusters

Education & Knowledge Creation (**0.98**; 2,650)

Printing & Publishing (**0.87**; 1,732)

Business & Financial Services (**0.78**; 12,134)

Apparel & Textiles (**0.74**; 631)

Forest & Wood Products (**0.57**; 949)

Information Technology & Telecom. (**0.41**; 1,893)

Fabricated Metal Product Mfg. (**0.18**; 171)

Manufacturing Supercluster (**0.08**; 303)

Transportation Equipment Mfg. (**0.06**; 59)

Emerging Clusters

Agribusiness, Food Processing & Technology (**0.95**; 3,262)

Biomedical/Biotechnical (Life Sciences) (**0.81**; 7,317)

Energy (Fossil And Renewable) (**0.73**; 4,583)

Defense & Security (**0.46**; 2,245)

Chemicals (**0.31**; 442)

Transportation & Logistics (**0.28**; 1,044)
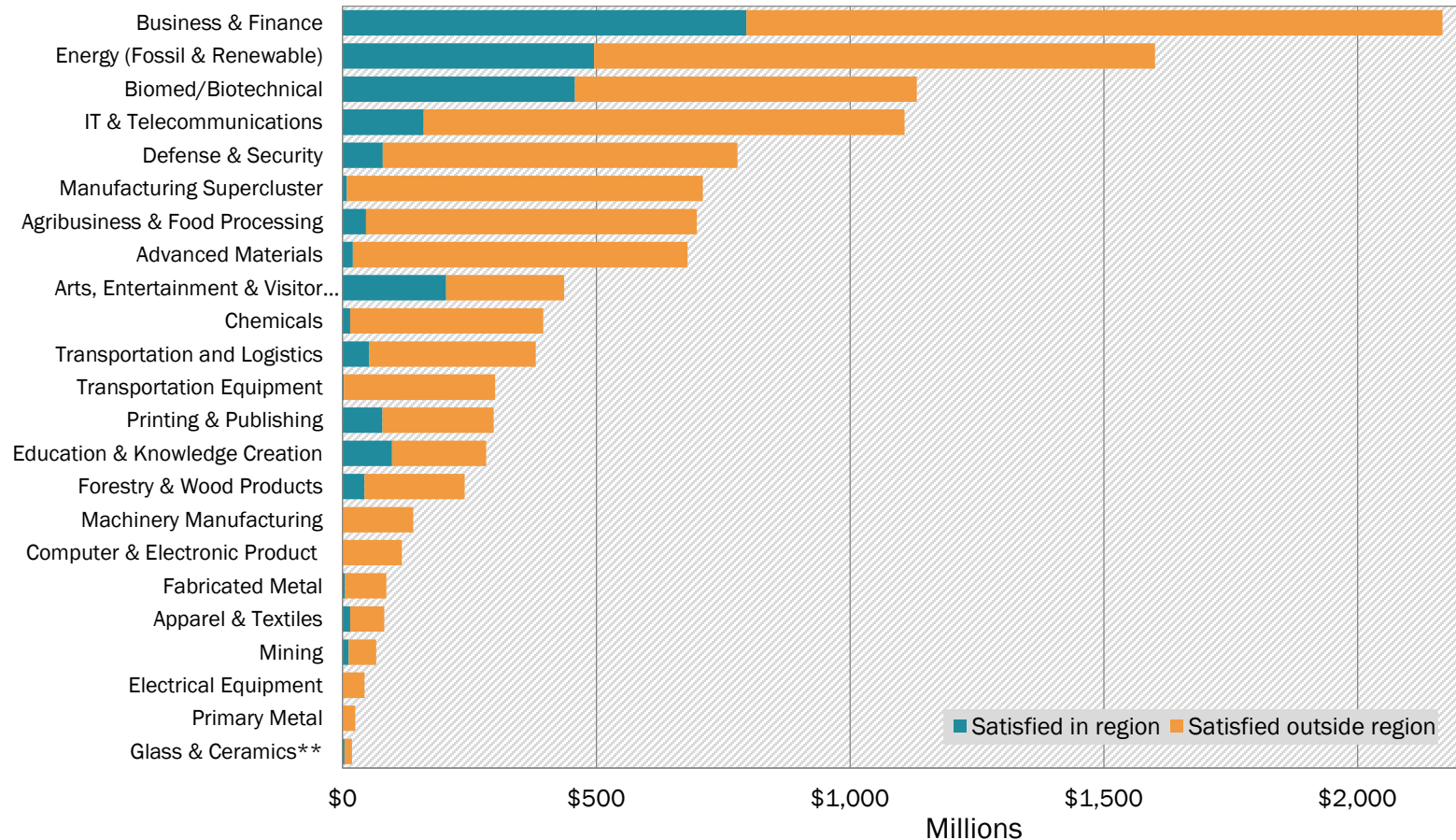
Advanced Materials (**0.22**; 757)

Note: Primary Metal Mfg., Electrical Equip, Appliance & Component Mfg., Computer & Electronic Product Mfg., and Machinery Mfg. subclusters have too few jobs.

section 02

NOTE: The first number after each cluster represents its location quotient while the second number represents the number of total jobs (full and part time jobs by place of work) in that cluster in the region in 2014. The clusters are sorted in decreasing order by location quotient.
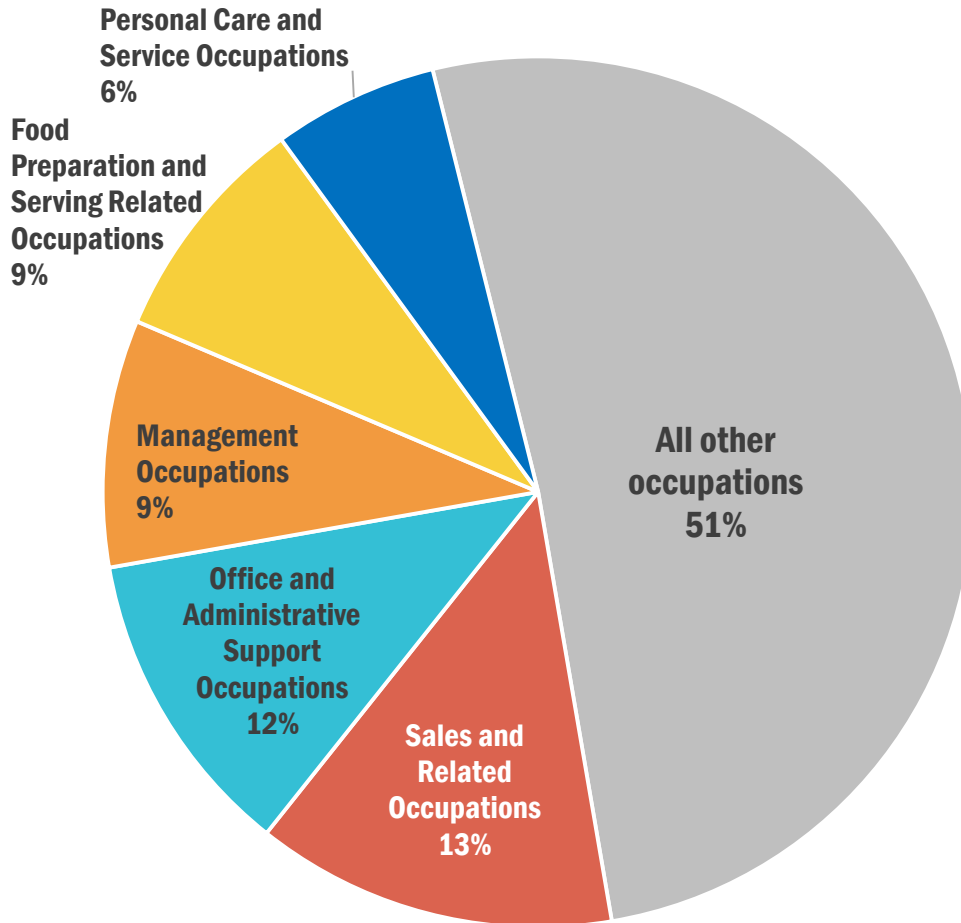
Regional requirements, 2013

Note: ** shows Star clusters

section 05

Top five occupations in 2014

Pie chart: Top five occupations in 2014

- Personal Care and Service Occupations 6%
- Food Preparation and Serving Related Occupations 9%
- Management Occupations 9%
- Office and Administrative Support Occupations 12%
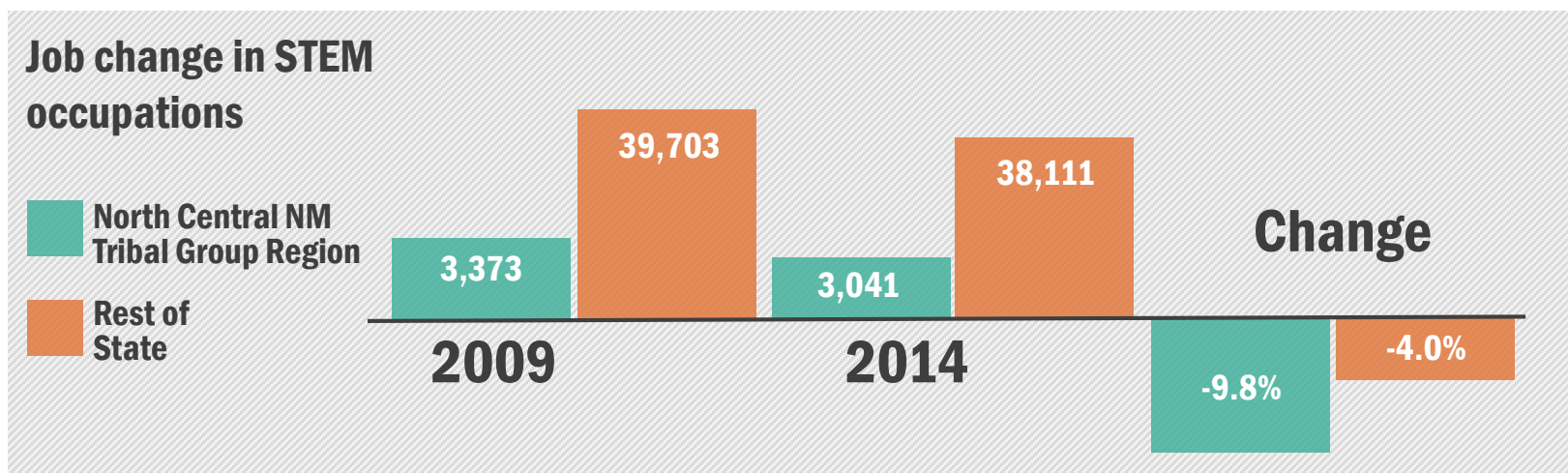- Sales and Related Occupations 13%
- All other occupations 51%

Questions:

- What are the education and skill requirements for these occupations?

- Do the emerging and star clusters align with the top occupations?

- What type salaries do these occupations typically provide?

section 05

Science, Technology, Engineering & Math

Job change in STEM occupations

- North Central NM Tribal Group Region
- Rest of State

	2009	2014	Change
North Central NM Tribal Group Region	3,373	3,041	-9.8%
Rest of State	39,703	38,111	-4.0%

Questions:

- How do STEM jobs compare to the state?

- What has been the trend of STEM jobs over time?

- How important are STEM jobs to the region's Star and Emerging clusters?

*Note: STEM and STEM-related occupation definitions from BLS (2010)

section 05

Report Contributors

This report was prepared by the Purdue Center for Regional Development, in partnership with the Southern Rural Development Center and USDA Rural Development, in support of the Stronger Economies Together program.

Report Authors
Bo Beaulieu, PhD
Indraneel Kumar, PhD
Andrey Zhalnin, PhD

Data Analysis
Ayoung Kim
Francisco Scott

Report Design
Tyler Wright

The Purdue Center for Regional Development (PCRD) seeks to pioneer new ideas and strategies that contribute to regional collaboration, innovation and prosperity.

For more information,
please contact:

Dr. Bo Beaulieu,
PCRD Director:
ljb@purdue.edu

Or

765-494-7273

September 2015