



Target Industry Cluster Analysis

South Central Mountains Region, New Mexico

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01 overview

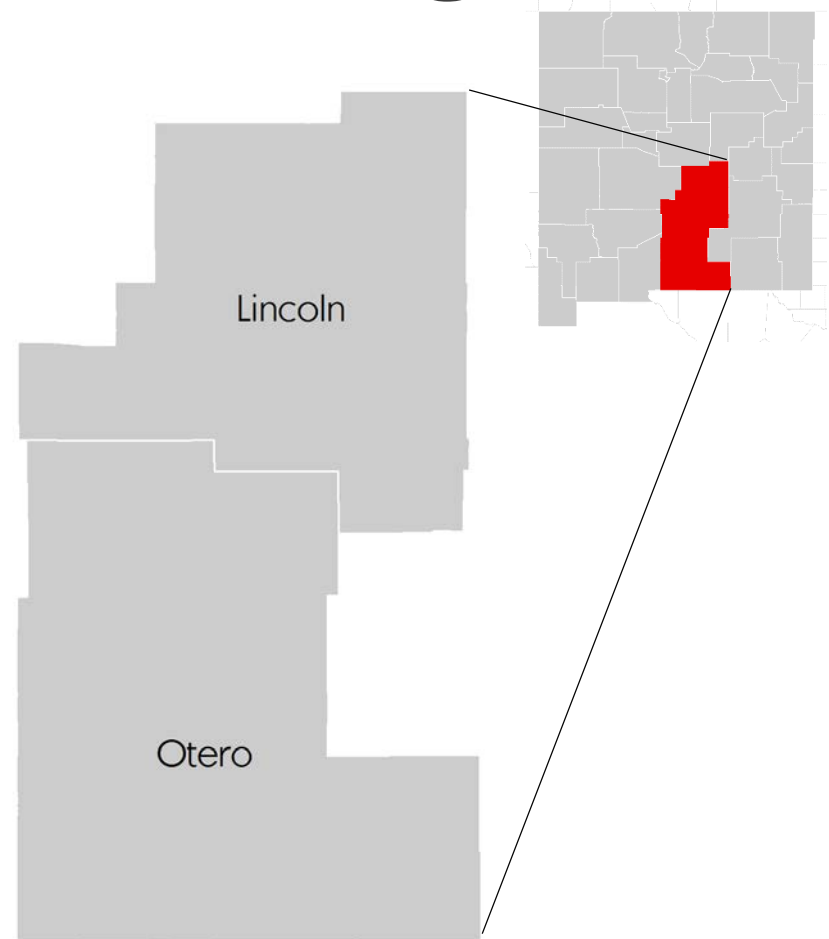
**South Central Mountains
Region, NM**

Overview

South Central Mountains Region

The South Central Mountains Region is comprised of two New Mexico counties and one reservation in southern New Mexico. U.S. Highway 54 passes through the middle part of the region connecting to I-10 to the south and I-40 to the north.

- Lincoln
- Otero
- Mescalero Apache Nation



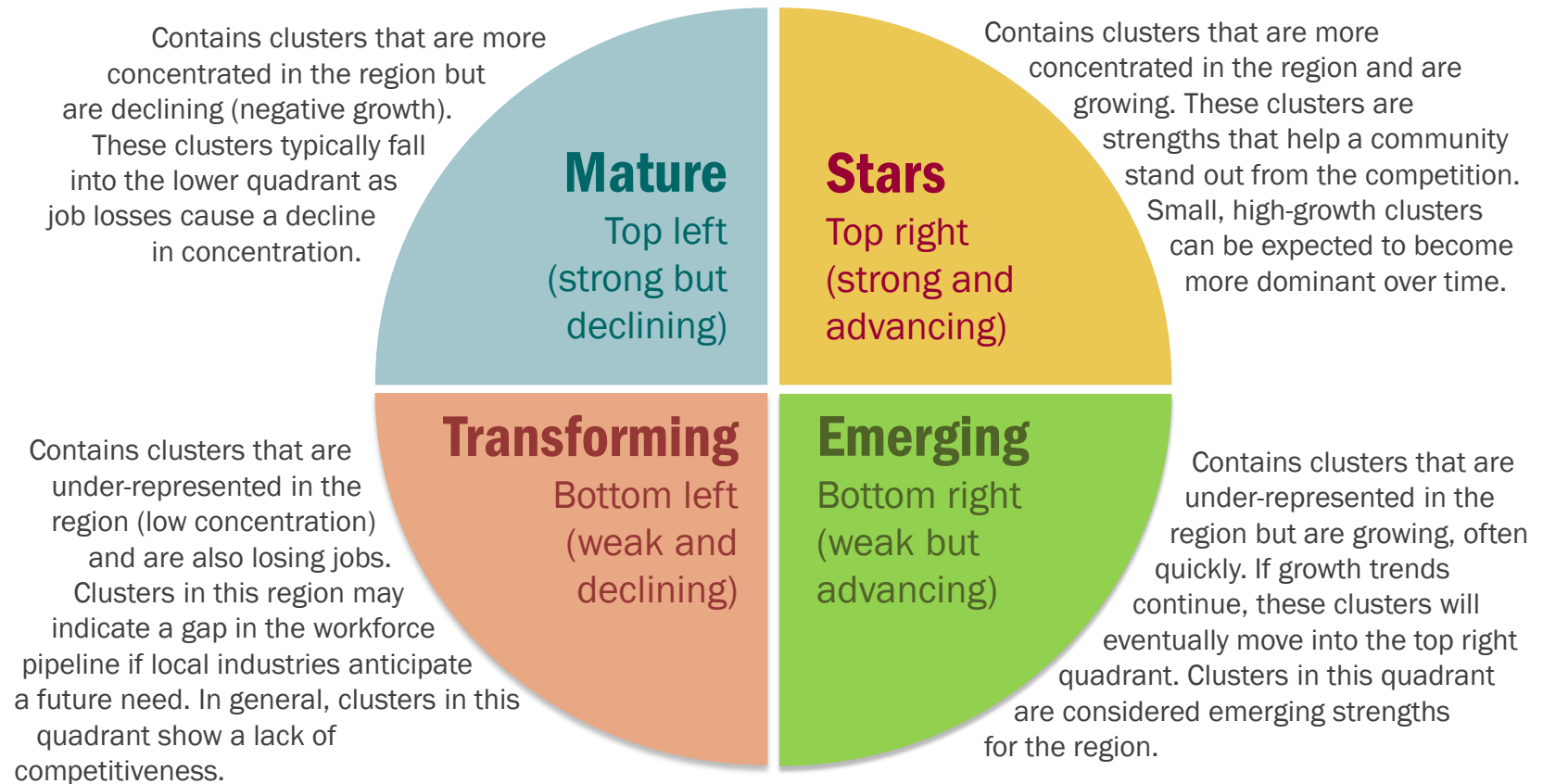
02 industry cluster analysis

**South Central Mountains
Region, NM**

Industry cluster analysis

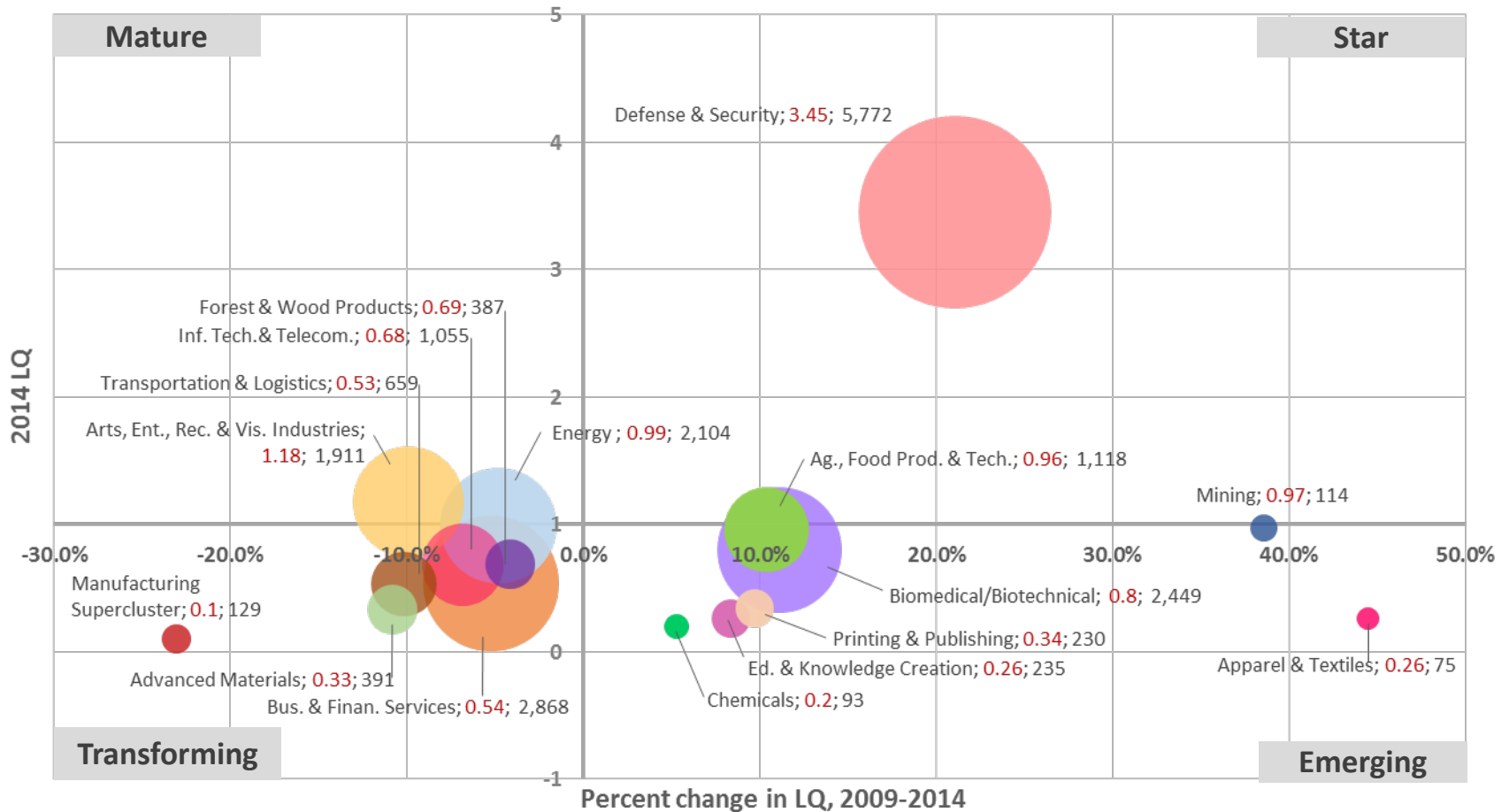
How to interpret cluster data results

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



Industry and occupation

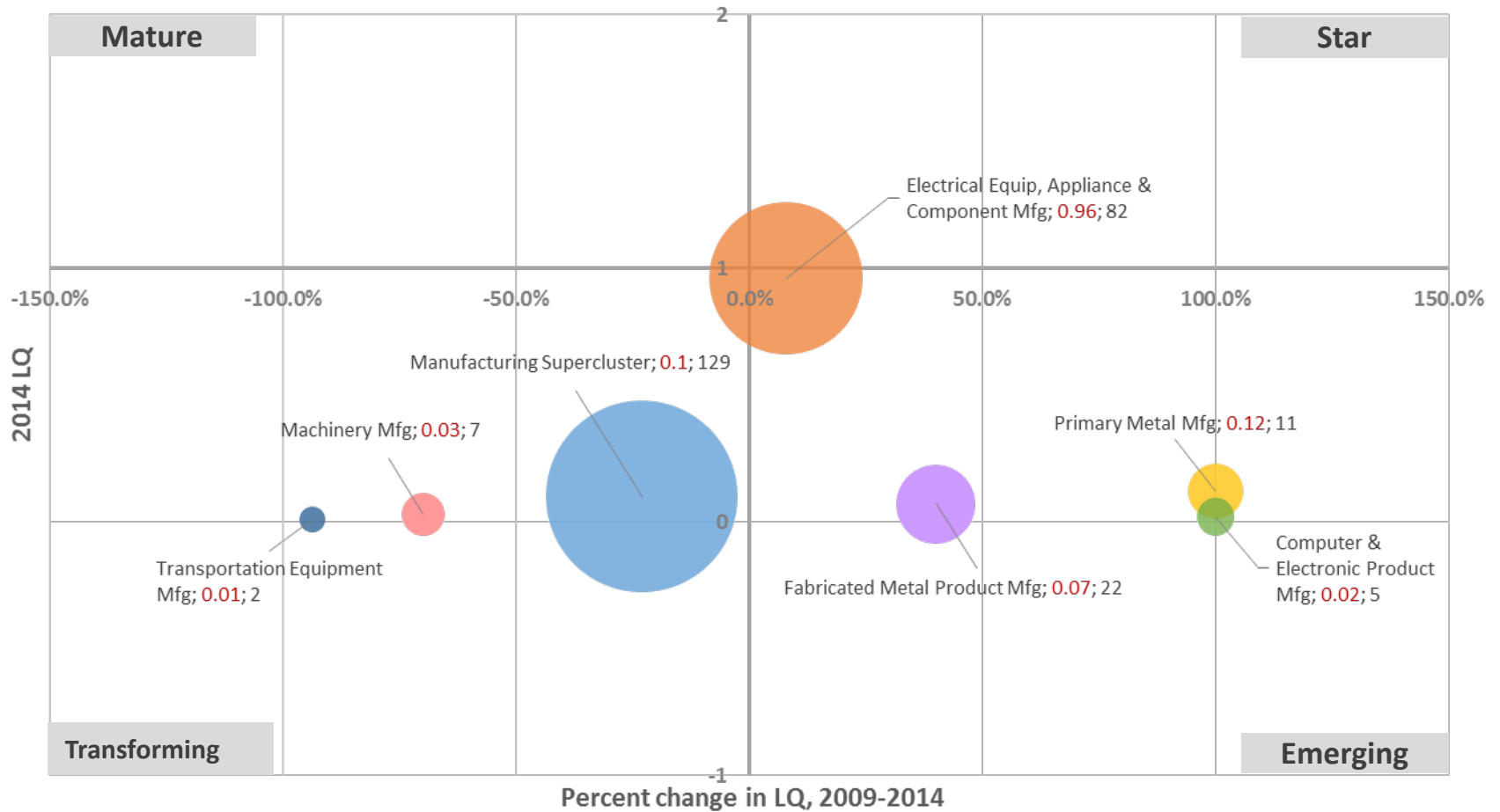
Industry cluster bubble chart



Note: Glass & Ceramics cluster does not exist in the region (has only 3 jobs).

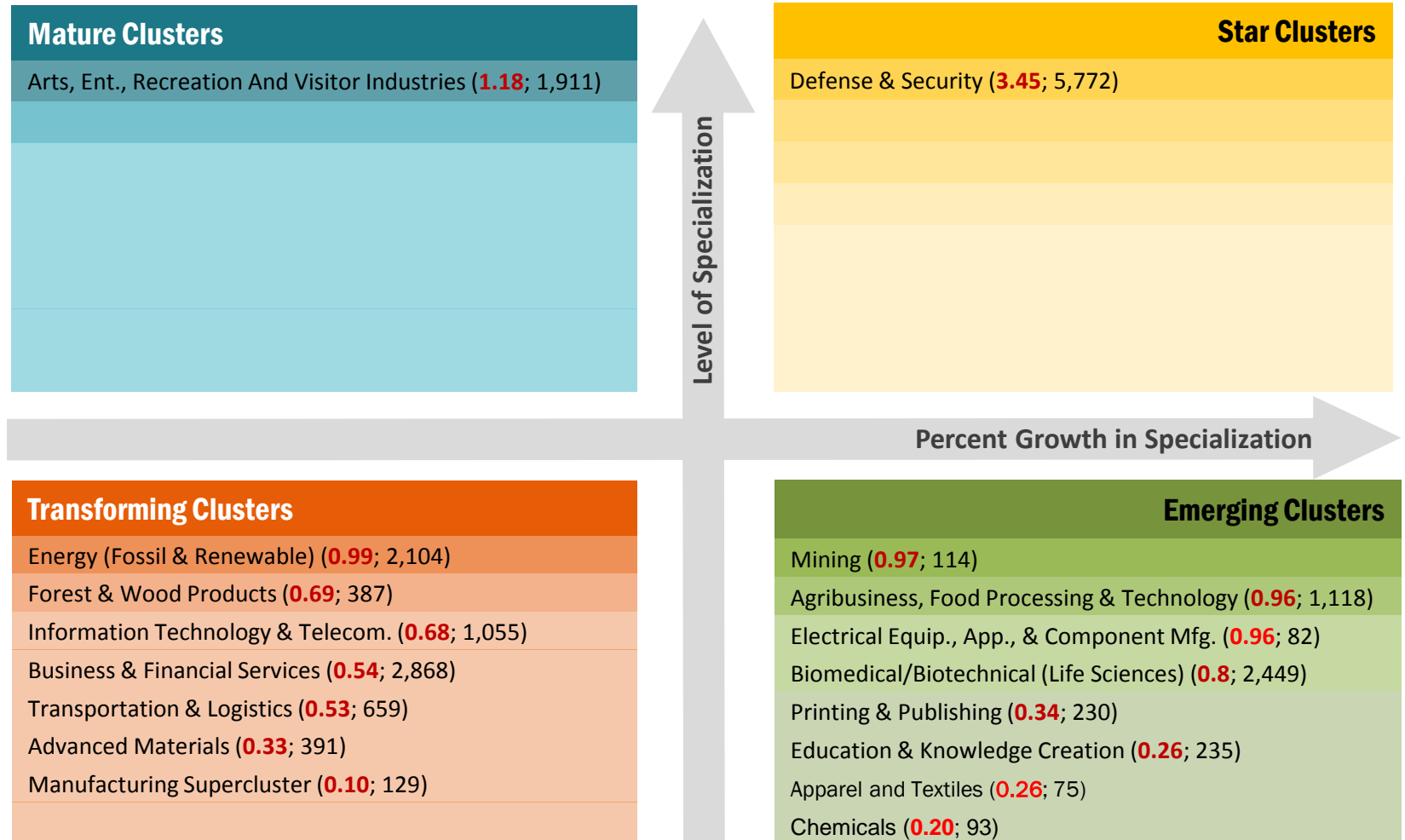
Industry and occupation

Manufacturing sub-cluster bubble chart



Note: Transportation Equipment Mfg., Machinery Mfg., Computer & Electronic Product Mfg., Primary Metal Mfg. and Fabricated Metal Mfg. subclusters have too few jobs.

Industry cluster analysis



Note: Transportation Equipment Mfg., Machinery Mfg., Computer & Electronic Product Mfg., Primary Metal Mfg. and Fabricated Metal Mfg. subclusters have too few jobs. Glass & Ceramics cluster does not exist in the region (has only 3 jobs).

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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.

Industry and occupation

Bubble chart interpretation

Mature Industries

Only one industry cluster in the South Central Mountains Region is in the Maturing stage: Arts, Entertainment, Recreation And Visitor Industries. This cluster is relatively concentrated, but its growth is trending downward. It is worth noting, however, that the South Central Mountains Region may find it worthwhile to invest in efforts to shore up the concentration of this industry.

Transforming Industries

Transforming clusters capture the mix of industries that are experiencing relative decline and limited export capability. In the South Central Mountains Region, transforming clusters are Energy (Fossil And Renewable); Forest And Wood Products; Information Technology And Telecommunications; Business And Financial Services; Transportation And Logistics; Advanced Materials; and Manufacturing Supercluster. Any amount of growth in these industries would require relatively large investments.

Star Industries

Star industry clusters are highly concentrated, exporting and still experiencing growth in the region. The only highly concentrated of the Star industry clusters in the South Central Mountains Region is Defense And Security. Its location quotient is 3.45, indicating that the cluster is 3.5 times more concentrated in the region compared to the U.S.

Emerging Industries

Industry clusters that may be poised for future growth are classified as “Emerging.” There are eight emerging clusters in the South Central Mountains Region: Mining; Agribusiness, Food Processing And Technology; Electrical Equip., App., And Component Manufacturing; Biomedical/Biotechnical (Life Sciences); Printing And Publishing; Education And Knowledge Creation; Apparel And Textiles; and Chemicals.

03 target industry clusters

**Arts, Entertainment,
Recreation And Visitor
Industries**

Biomedical/Biotechnical

**Information Technology &
Telecommunications**

Forest and Wood Products

Shift-Share Analysis by Top Industry Sectors: South Central Mountains Region, NM

Arts, Entertainment, Recreation And Visitor Industries Cluster

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Cumulative Expected Growth	Regional Performance, 2009-2014
Hotels (except Casino Hotels) and Motels	472	38	1	39	-63
Independent Artists, Writers, and Performers	262	21	10	31	-48
Casinos (except Casino Hotels)	219	12	-3	9	↑ 55
Golf Courses and Country Clubs	173	14	-6	8	-15
Fitness and Recreational Sports Centers	112	7	3	10	↑ 15
Other Spectator Sports	104	7	6	13	-6
All Other Traveler Accommodation	79	5	15	20	-10
Radio Stations	69	4	-2	2	↑ 18
RV (Recreational Vehicle) Parks and Campgrounds	61	4	5	9	-7
Theater Companies and Dinner Theaters	48	3	3	6	↑ 6
Racetracks	36	2	-2	0	↑ 7
Motion Picture Theaters (except Drive-Ins)	34	2	-6	-4	↑ 6
All Other Amusement and Recreation Industries	27	4	11	15	-46
Other Gambling Industries	24	3	-3	0	-11
Nature Parks and Other Similar Institutions	20	1	0	1	0

Note: Upward arrow (↑) indicates regional competitiveness..

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Top 15 Inputs by Dollars: South Central Mountains Region, NM

Arts, Entertainment, Recreation And Visitor Industries Cluster

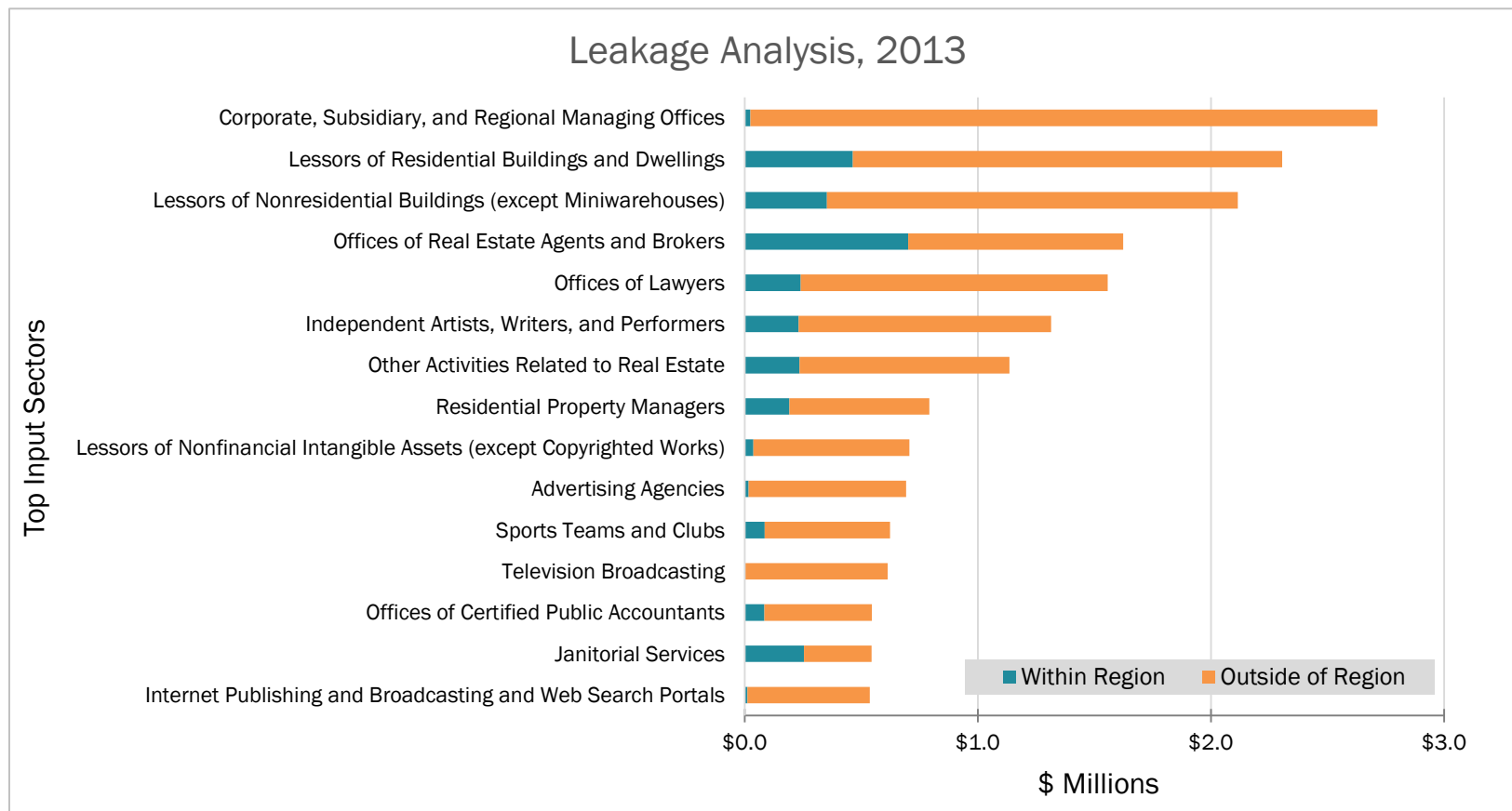
Industries	Estimated Input (\$ Millions), 2013	% In-Region	% Out of Region
Corporate, Subsidiary, and Regional Managing Offices	\$2.71	1%	99%
Lessors of Residential Buildings and Dwellings	\$2.31	20%	80%
Lessors of Nonresidential Buildings (except Miniwarehouses)	\$2.12	17%	83%
Offices of Real Estate Agents and Brokers	\$1.62	43%	57%
Offices of Lawyers	\$1.56	15%	85%
Independent Artists, Writers, and Performers	\$1.32	18%	82%
Other Activities Related to Real Estate	\$1.14	21%	79%
Residential Property Managers	\$0.79	24%	76%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works) *	\$0.71	5%	95%
Advertising Agencies *	\$0.69	3%	97%
Sports Teams and Clubs	\$0.62	14%	86%
Television Broadcasting	\$0.61	0%	100%
Offices of Certified Public Accountants	\$0.55	16%	84%
Janitorial Services	\$0.54	47%	53%
Internet Publishing and Broadcasting and Web Search Portals *	\$0.54	2%	98%

Note: * industry sector has less than 10 jobs as calculated by EMSI; ** industry sector is not present in the region .

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Top 15 Inputs by Dollars: South Central Mountains Region, NM

Arts, Entertainment, Recreation And Visitor Industries Cluster



Note: ** industry sector is not present in the region .

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

Top Occupations: South Central Mountains Region, NM

Arts, Entertainment, Recreation And Visitor Industries Cluster

Occupations	Jobs 2014	% Change, 2009-2014	Median Hourly Earnings, 2014	Entry Level Education
Maids and Housekeeping Cleaners	157	1%	\$9.2	Less than high school
Musicians and Singers	97	13%	\$13.9	High school diploma or equivalent
Hotel, Motel, and Resort Desk Clerks	91	0%	\$8.6	High school diploma or equivalent
Lodging Managers	78	-19%	\$16.6	High school diploma or equivalent
Writers and Authors	73	0%	\$12.9	Bachelor's degree
Waiters and Waitresses	60	-5%	\$8.9	Less than high school
Gaming Dealers	55	28%	\$8.3	High school diploma or equivalent
Landscaping and Groundskeeping Workers	41	-9%	\$9.1	Less than high school
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	35	6%	\$9.7	Less than high school
Recreation Workers	34	-29%	\$9.5	Bachelor's degree
Radio and Television Announcers	32	33%	\$9.4	Bachelor's degree
Maintenance and Repair Workers, General	32	-9%	\$12.7	High school diploma or equivalent
Multimedia Artists and Animators	32	-3%	\$10.1	Bachelor's degree
Coaches and Scouts	29	0%	\$12.2	Bachelor's degree
Amusement and Recreation Attendants	29	-45%	\$9.0	Less than high school

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014.

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

Shift-Share Analysis by Top Industry Sectors: South Central Mountains Region, NM

Biomedical/Biotechnical (Life Sciences)

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Cumulative Expected Growth	Regional Performance, 2009-2014
General Medical and Surgical Hospitals	776	63	-39	24	-76
Home Health Care Services	466	17	43	60	↑ 189
Research and Development in the Physical, Engineering, and Life Sciences (except Biotechnology)	304	23	-8	15	-18
Nursing Care Facilities (Skilled Nursing Facilities)	232	19	-18	1	-17
Ambulance Services	104	1	0	1	↑ 84
Pharmacies and Drug Stores	101	8	-10	-2	-4
Assisted Living Facilities for the Elderly	87	1	1	2	↑ 65
Residential Intellectual and Developmental Disability Facilities	66	6	1	7	-13
Freestanding Ambulatory Surgical and Emergency Centers	47	0	1	1	↑ 41
All Other Outpatient Care Centers	40	1	3	4	↑ 21
Medical Laboratories	38	1	2	3	↑ 16
Cosmetics, Beauty Supplies, and Perfume Stores	29	4	3	7	-25
Food (Health) Supplement Stores	28	3	3	6	-12
Research and Development in the Social Sciences and Humanities	28	3	-4	-1	-13
Diagnostic Imaging Centers	27	1	-1	0	↑ 10

Note: Upward arrow (↑) indicates regional competitiveness..

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Top 15 Inputs by Dollars: South Central Mountains Region, NM

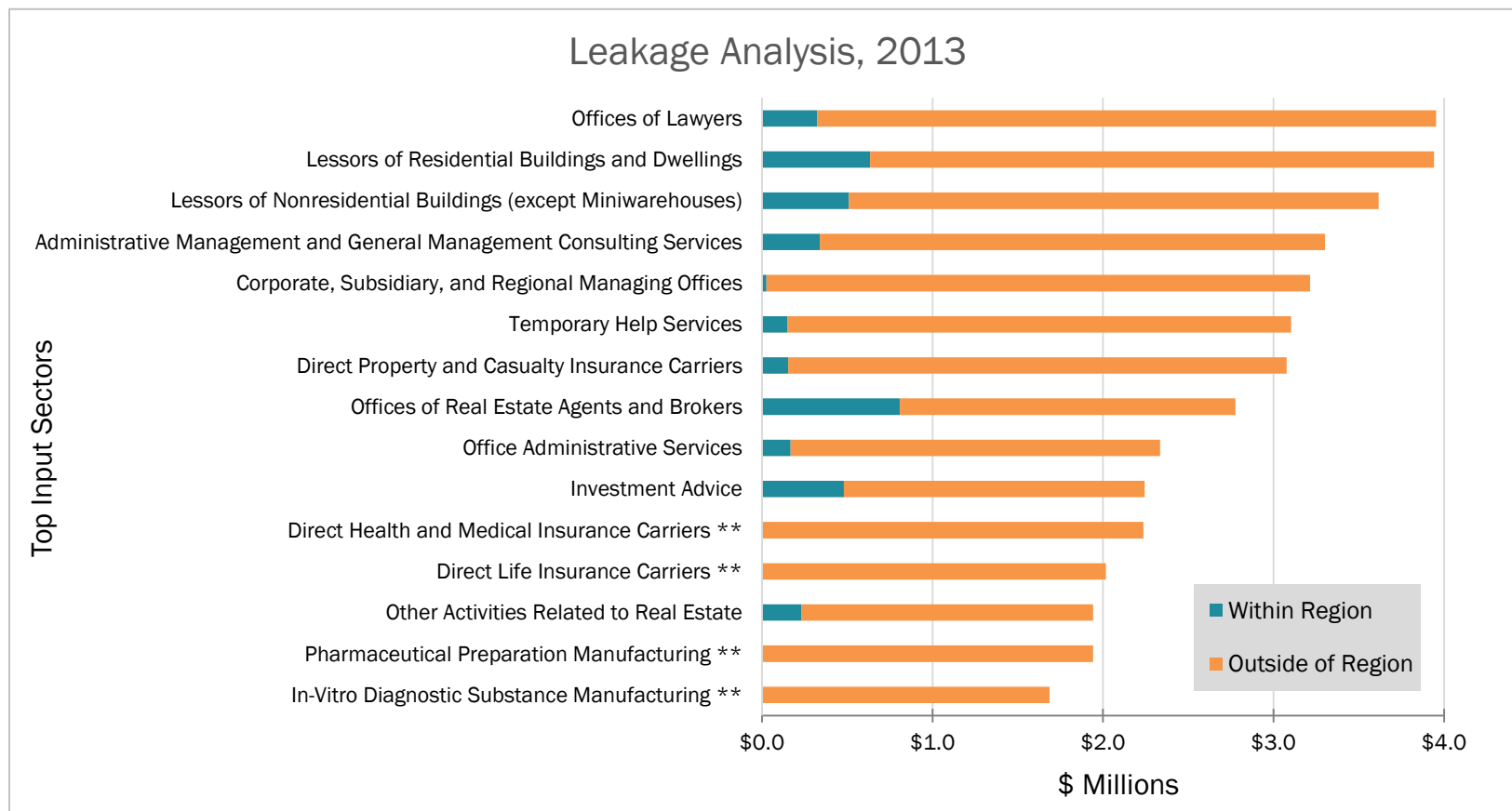
Biomedical/Biotechnical (Life Sciences)

Industries	Estimated Input (\$ Millions), 2013	% In-Region	% Out of Region
Offices of Lawyers	\$3.95	8%	92%
Lessors of Residential Buildings and Dwellings	\$3.94	16%	84%
Lessors of Nonresidential Buildings (except Miniwarehouses)	\$3.62	14%	86%
Administrative Management and General Management Consulting Services	\$3.30	10%	90%
Corporate, Subsidiary, and Regional Managing Offices	\$3.21	1%	99%
Temporary Help Services	\$3.10	5%	95%
Direct Property and Casualty Insurance Carriers	\$3.08	5%	95%
Offices of Real Estate Agents and Brokers	\$2.78	29%	71%
Office Administrative Services	\$2.34	7%	93%
Investment Advice	\$2.24	21%	79%
Direct Health and Medical Insurance Carriers **	\$2.24	0%	100%
Direct Life Insurance Carriers **	\$2.02	0%	100%
Other Activities Related to Real Estate	\$1.94	12%	88%
Pharmaceutical Preparation Manufacturing **	\$1.94	0%	100%
In-Vitro Diagnostic Substance Manufacturing **	\$1.69	0%	100%

Note: * industry sector has less than 10 jobs as calculated by EMSI; ** industry sector is not present in the region .

Top 15 Inputs by Dollars: South Central Mountains Region, NM

Biomedical/Biotechnical (Life Sciences)



Note: ** industry sector is not present in the region.

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Top Occupations: South Central Mountains Region, NM

Biomedical/Biotechnical (Life Sciences)

Occupations	Jobs 2014	% Change, 2009-2014	Median Hourly Earnings, 2014	Entry Level Education
Personal Care Aides	278	74%	\$8.6	Less than high school
Registered Nurses	243	3%	\$29.0	Associate's degree
Home Health Aides	210	81%	\$9.0	Less than high school
Nursing Assistants	175	7%	\$10.3	Postsecondary non-degree award
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	57	2%	\$11.4	High school diploma or equivalent
Licensed Practical and Licensed Vocational Nurses	53	13%	\$21.0	Postsecondary non-degree award
Emergency Medical Technicians and Paramedics	52	333%	\$15.7	Postsecondary non-degree award
Pharmacy Technicians	42	0%	\$14.0	High school diploma or equivalent
Maids and Housekeeping Cleaners	42	2%	\$9.2	Less than high school
Medical Secretaries	39	15%	\$12.6	High school diploma or equivalent
Retail Salespersons	37	-21%	\$9.4	Less than high school
Medical and Health Services Managers	36	20%	\$40.3	Bachelor's degree
Medical Assistants	35	30%	\$12.2	Postsecondary non-degree award
General and Operations Managers	32	19%	\$33.1	Bachelor's degree
Radiologic Technologists	31	11%	\$25.3	Associate's degree

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014.

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

Shift-Share Analysis by Top Industry Sectors: South Central Mountains Region, NM

Information Technology And Telecommunications Cluster

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Cumulative Expected Growth	Regional Performance, 2009-2014
Research and Development in the Physical, Engineering, and Life Sciences (except Biotechnology)	304	23	-8	15	-18
Electrical Contractors and Other Wiring Installation Contractors	233	17	-13	4	↑ 2
Wired Telecommunications Carriers	198	15	-17	-2	-4
Custom Computer Programming Services	99	9	16	25	-38
Motor and Generator Manufacturing	76	6	-9	-3	↑ 5
Computer Systems Design Services	30	4	7	11	-40
Data Processing, Hosting, and Related Services	29	3	2	5	-16
Research and Development in the Social Sciences and Humanities	28	3	-4	-1	-13
Computer Facilities Management Services	24	0	0	0	↑ 18
Other Computer Related Services	22	0	-1	-1	↑ 17

Note: Upward arrow (↑) indicates regional competitiveness. EMSI does not show sufficient jobs for Other Measuring and Controlling Device Manufacturing; Other Electronic Parts and Equipment Merchant Wholesalers; Relay and Industrial Control Manufacturing; Computer and Computer Peripheral Equipment and Software Merchant Wholesalers; and Software Publishers.

Top 15 Inputs by Dollars: South Central Mountains Region, NM

Information Technology And Telecommunications Cluster

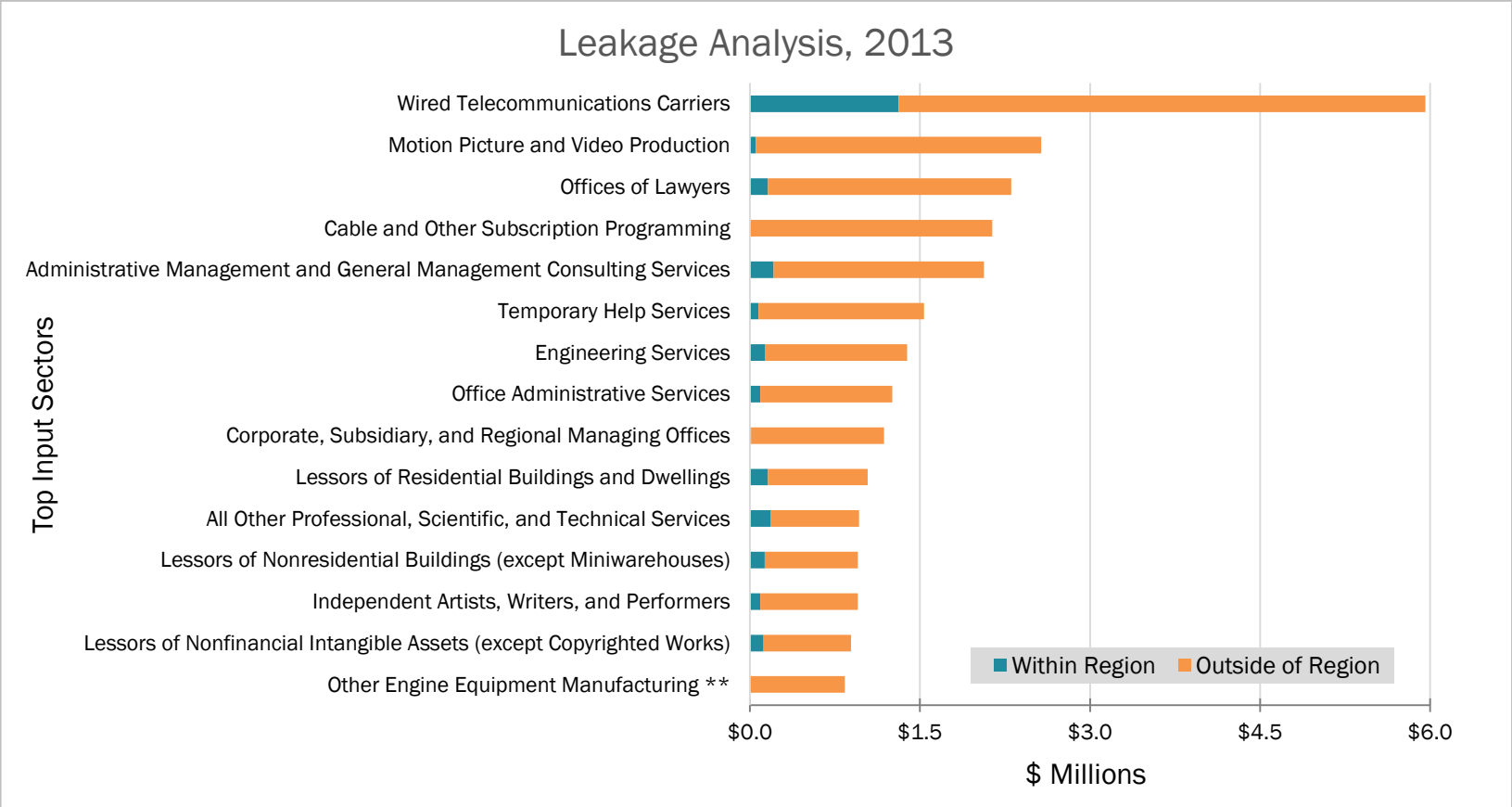
Industries	Estimated Input (\$ Millions), 2013	% In-Region	% Out of Region
Wired Telecommunications Carriers	\$5.96	22%	78%
Motion Picture and Video Production *	\$2.57	2%	98%
Offices of Lawyers	\$2.30	7%	93%
Cable and Other Subscription Programming *	\$2.14	0%	100%
Administrative Management and General Management Consulting Services	\$2.06	10%	90%
Temporary Help Services	\$1.54	5%	95%
Engineering Services	\$1.39	10%	90%
Office Administrative Services	\$1.26	7%	93%
Corporate, Subsidiary, and Regional Managing Offices	\$1.18	1%	99%
Lessors of Residential Buildings and Dwellings	\$1.04	15%	85%
All Other Professional, Scientific, and Technical Services	\$0.96	19%	81%
Lessors of Nonresidential Buildings (except Miniwarehouses)	\$0.95	14%	86%
Independent Artists, Writers, and Performers	\$0.95	10%	90%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works) *	\$0.89	13%	87%
Other Engine Equipment Manufacturing **	\$0.84	0%	100%

Note: * industry sector has less than 10 jobs as calculated by EMSI; ** industry sector is not present in the region .

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Top 15 Inputs by Dollars: South Central Mountains Region, NM

Information Technology And Telecommunications Cluster



Note: ** industry sector is not present in the region .

section 03

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

Top Occupations: South Central Mountains Region, NM

Information Technology And Telecommunications Cluster

Occupations	Jobs 2014	% Change, 2009-2014	Median Hourly Earnings, 2014	Entry Level Education
Electricians	80	3%	\$17.5	High school diploma or equivalent
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	44	-2%	\$11.4	High school diploma or equivalent
Telecommunications Equipment Installers and Repairers, Except Line Installers	39	3%	\$21.1	Postsecondary non-degree award
Telecommunications Line Installers and Repairers	36	-5%	\$16.4	High school diploma or equivalent
General and Operations Managers	35	-8%	\$33.1	Bachelor's degree
Helpers--Electricians	33	6%	\$11.9	High school diploma or equivalent
Computer User Support Specialists	31	0%	\$17.8	Some college, no degree
Customer Service Representatives	25	-4%	\$12.0	High school diploma or equivalent
Sales Representatives, Services, All Other	23	5%	\$21.9	High school diploma or equivalent
Medical Scientists, Except Epidemiologists	18	-5%	\$34.6	Doctoral or professional degree
Business Operations Specialists, All Other	18	-5%	\$25.3	High school diploma or equivalent
Managers, All Other	18	6%	\$22.9	High school diploma or equivalent
Bookkeeping, Accounting, and Auditing Clerks	17	-6%	\$13.5	High school diploma or equivalent
Construction Laborers	17	13%	\$11.1	Less than high school
Web Developers	16	33%	\$15.1	Associate's degree

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014.

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Shift-Share Analysis by Top Industry Sectors: South Central Mountains Region, NM

Forest And Wood Products Cluster

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Cumulative Expected Growth	Regional Performance, 2009-2014
Finish Carpentry Contractors	65	3	-5	-2	↑ 31
Roofing Contractors	58	4	-2	2	↑ 6
Support Activities for Forestry	52	7	-5	2	-39
Framing Contractors	44	5	-11	-6	-10
Flooring Contractors	35	1	-1	0	↑ 25
Logging	30	4	-3	1	-19
Wood Window and Door Manufacturing	17	2	-4	-2	-4
Siding Contractors	17	2	-5	-3	-7
Wood Container and Pallet Manufacturing	12	1	0	1	↑ 1
All Other Miscellaneous Wood Product Manufacturing	11	1	0	1	-2
Wood Kitchen Cabinet and Countertop Manufacturing	11	0	-1	-1	↑ 5

Note: Upward arrow (↑) indicates regional competitiveness. EMSI does not show sufficient jobs for Cut Stock, Resawing Lumber, and Planing; Other Millwork (including Flooring); Reconstituted Wood Product Manufacturing; and Custom Architectural Woodwork and Millwork Manufacturing.

section 03

Top 15 Inputs by Dollars: South Central Mountains Region, NM

Forest And Wood Products Cluster

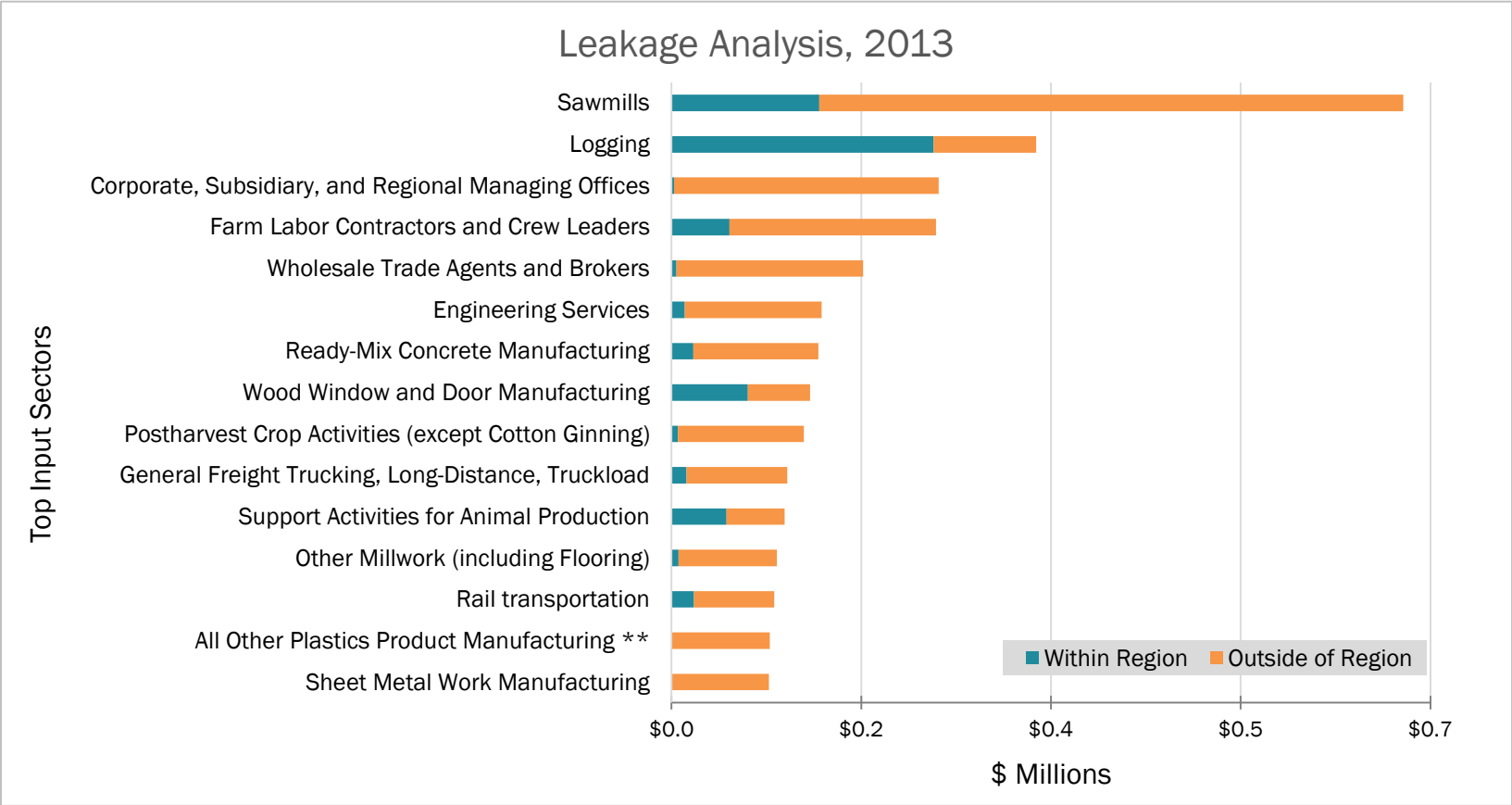
Industries	Estimated Input (\$ Millions), 2013	% In-Region	% Out of Region
Sawmills *	\$0.69	20%	80%
Logging	\$0.35	72%	28%
Corporate, Subsidiary, and Regional Managing Offices	\$0.25	1%	99%
Farm Labor Contractors and Crew Leaders	\$0.25	22%	78%
Wholesale Trade Agents and Brokers	\$0.18	3%	97%
Engineering Services	\$0.14	9%	91%
Ready-Mix Concrete Manufacturing	\$0.14	15%	85%
Wood Window and Door Manufacturing	\$0.13	55%	45%
Postharvest Crop Activities (except Cotton Ginning) *	\$0.13	5%	95%
General Freight Trucking, Long-Distance, Truckload	\$0.11	13%	87%
Support Activities for Animal Production	\$0.11	49%	51%
Other Millwork (including Flooring) *	\$0.10	7%	93%
Rail transportation	\$0.10	22%	78%
All Other Plastics Product Manufacturing **	\$0.09	0%	100%
Sheet Metal Work Manufacturing *	\$0.09	1%	99%

Note: * industry sector has less than 10 jobs as calculated by EMSI; ** industry sector is not present in the region .

section 03

Top 15 Inputs by Dollars: South Central Mountains Region, NM

Forest And Wood Products Cluster



Note: ** industry sector is not present in the region.

Top Occupations: South Central Mountains Region, NM

Forest And Wood Products Cluster

Occupations	Jobs 2014	% Change, 2009-2014	Median Hourly Earnings, 2014	Entry Level Education
Carpenters	47	27%	\$14.3	High school diploma or equivalent
Construction Laborers	43	54%	\$11.1	Less than high school
Managers, All Other	20	33%	\$22.9	High school diploma or equivalent
Logging Equipment Operators	18	-33%	\$9.4	High school diploma or equivalent
Woodworkers, All Other	16	7%	\$9.4	High school diploma or equivalent
Construction Managers	16	33%	\$23.4	Bachelor's degree
First-Line Supervisors of Construction Trades and Extraction Workers	15	7%	\$22.7	High school diploma or equivalent
Roofers	15	36%	\$13.0	Less than high school
Nonfarm Animal Caretakers	15	-25%	\$10.1	Less than high school
Animal Trainers	12	-40%	\$12.4	High school diploma or equivalent
Cabinetmakers and Bench Carpenters	11	0%	\$11.5	High school diploma or equivalent

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014. EMSI does not show sufficient jobs for Team Assemblers; Painters, Construction and Maintenance; Pipelayers; and Plumbers, Pipefitters, and Steamfitters.

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Report Contributors

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