



Helping communities identify targeted, sustainable economic development.

# **LOS ALAMOS COUNTY, NM**

**ASAP MODEL OUTPUT**

**OCTOBER 29, 2020**



 **ASAP** is a regional collaborative effort between these institutions and the Western Rural Development Center:



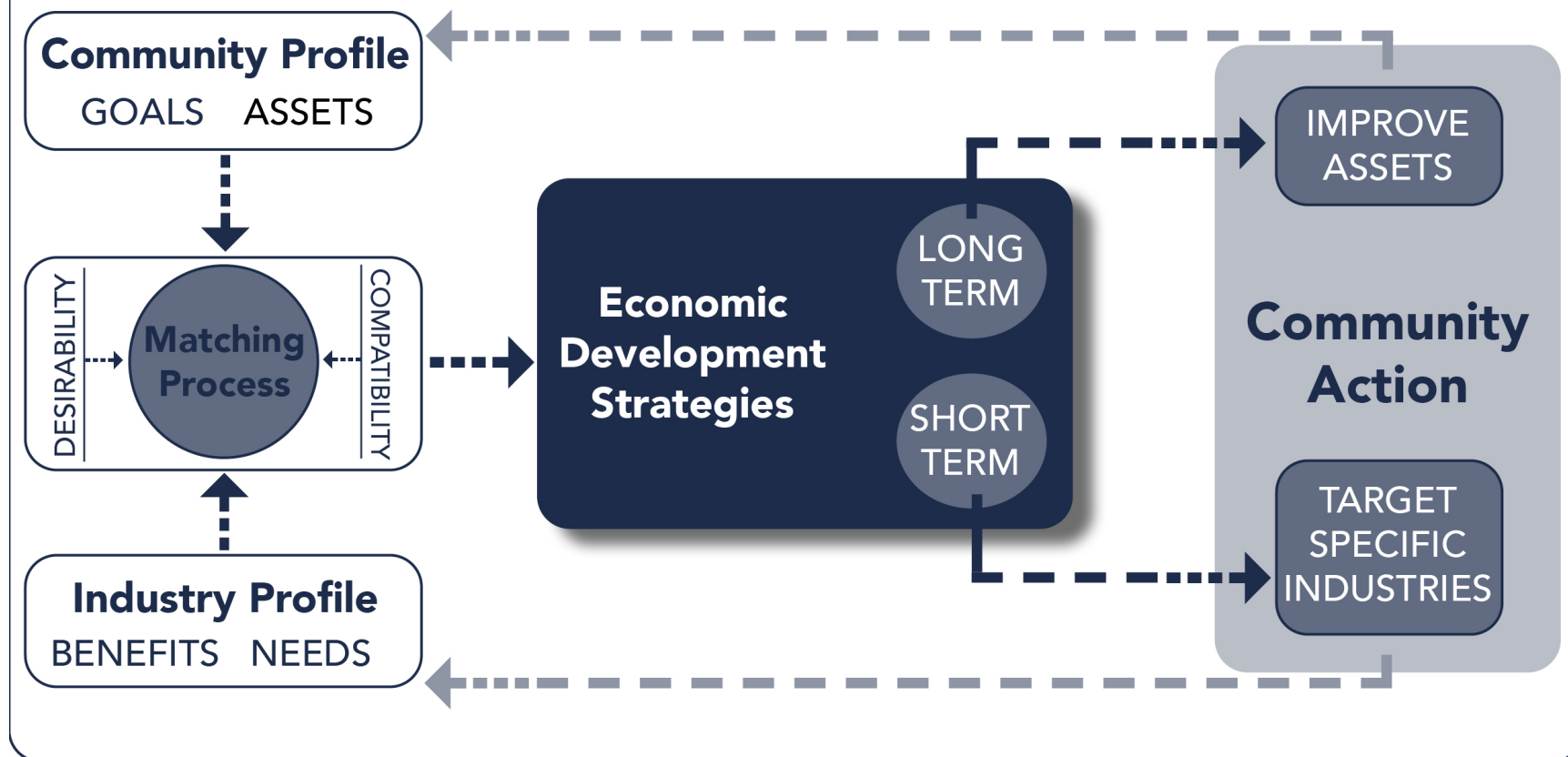
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# ASAP MODEL



# ASAP DATA REQUIREMENTS

## Primary

- Industry expansion and/or relocation needs and factors
  - Business survey
- Economic development goals and priorities
  - Business survey
  - Community survey
- Assets
  - Community asset inventory

## Secondary

- IMPLAN
- U.S. Census Bureau
- U.S. EPA
- U.S. Bureau of Economic Analysis
- U.S. Bureau of Labor Statistics
- FBI
- Federation of Tax Administrators
- Etc.

# BUSINESS RELOCATION CHOICE SURVEY

- Data collection began in 2003
  - Ongoing – ~150 new firms added per year since 2011
- Firms 'represent' 4-digit NAICS sector
  - 2,502 individual firms
  - 276 4-digit 2012 NAICS (88.5% of 312 sectors)
- Average observations per sector = 9
  - Median = 6
  - Min = 1 / Max = 69
- Target 10 observations per specific sector
  - Target 20 observation per 'other' sector
    - Emerging markets
  - Re-survey portion of existing firms

# BUSINESS SURVEY DATA EXAMPLE

NAICS 4239 - Miscellaneous Durable Goods Merchant Wholesalers				N = 9
Physical Infrastructure	Not Important	Somewhat Important	Important	Very Important
Access within 30 minutes to an interstate highway	22%	44%	11%	22%
Access within 30 minutes to package freight services	67%	0%	0%	33%
Immediate access to a railhead or rail spur	78%	11%	0%	11%
Access within 30 minutes to rail freight	78%	22%	0%	0%
Access within 30 minutes to passenger air services	67%	33%	0%	0%
Access within 30 minutes to port or harbor facilities	78%	11%	0%	11%
Access within 30 minutes to an international trade port	78%	11%	0%	11%
Access to natural gas pipeline	100%	0%	0%	0%
Access within one day, at a reasonable cost, to the supplies you need	22%	11%	11%	56%
Access within one day, at a reasonable cost, to your customers	33%	33%	0%	33%
Access to 3-phase electric power	56%	0%	11%	33%
Access to fiber optic lines	22%	22%	11%	44%
Availability of high-volume water supply	100%	0%	0%	0%
Availability of high-volume wastewater disposal	100%	0%	0%	0%
Availability of solid waste disposal	67%	33%	0%	0%
Availability of cell phone service	0%	0%	11%	89%
Availability of local public transportation	78%	11%	11%	0%
Possibility for future expansion at site	22%	33%	22%	22%
Availability of high-speed internet	11%	0%	0%	89%
Access to ponds and streams	0%	0%	0%	0%
Availability of satellite transmission	0%	0%	0%	0%

# BUSINESS SURVEY DATA EXAMPLE, CONT.

Economic Infrastructure	Not Important	Somewhat Important	Important	Very Important
Availability of managerial workforce	44%	33%	0%	22%
Availability of skilled workforce	33%	33%	0%	33%
Availability of technical workforce	44%	11%	11%	33%
Availability of unskilled workforce	67%	11%	0%	22%
Favorable local labor costs	33%	33%	0%	33%
Favorable worker's compensation tax rate	33%	11%	11%	44%
Favorable local business tax rates	11%	11%	0%	78%
Favorable state and local government incentives	100%	0%	0%	0%
Availability of union labor	56%	0%	0%	44%
Availability of specialized job training programs	89%	0%	0%	11%
Availability of long and short term financing	33%	56%	0%	11%
Existence of a business/trade association	78%	22%	0%	0%
Lenient environmental regulations	67%	11%	11%	11%

Quality of Life	Not Important	Somewhat Important	Important	Very Important
Low crime rate	11%	0%	22%	67%
Availability of affordable housing	11%	22%	11%	56%
Clean air and water	0%	11%	11%	78%
High quality natural ecosystem	22%	33%	22%	22%
Outdoor recreation opportunities	11%	44%	22%	22%
Social and cultural opportunities	33%	44%	22%	0%
Retail shopping opportunities	33%	67%	0%	0%
Quality educational system (K-12)	22%	0%	33%	44%
Access within 30 minutes to college or university	67%	22%	0%	11%
Availability of quality healthcare	22%	22%	22%	33%
Availability of public safety services (e.g. police, fire station)	11%	11%	22%	56%
Climate	22%	11%	22%	44%
Ease of attracting skilled workers	0%	0%	0%	0%

# LOS ALAMOS COUNTY, NM COMMUNITY GOAL SURVEY

- 13 Surveys Completed
  - **Community Name Responses:**  
Los Alamos
- Ranking of five goals per category
  - Environmental, Economic, Social
- Economic outlook
  - Personal and communities
- Rank quality of community characteristics
- Demographics



ASAP COMMUNITY

Community Name:

Date:



# LOS ALAMOS COUNTY, NM COMMUNITY GOAL SURVEY

**Table 1: Los Alamos County, NM Community Development Goal Rankings**

	<i>Goal</i>	<i>Weight</i>	<i>Rank</i>
G1.	Economic Quality	43.10%	1
G2.	Environmental Quality	28.10%	3
G3.	Social Quality	28.80%	2

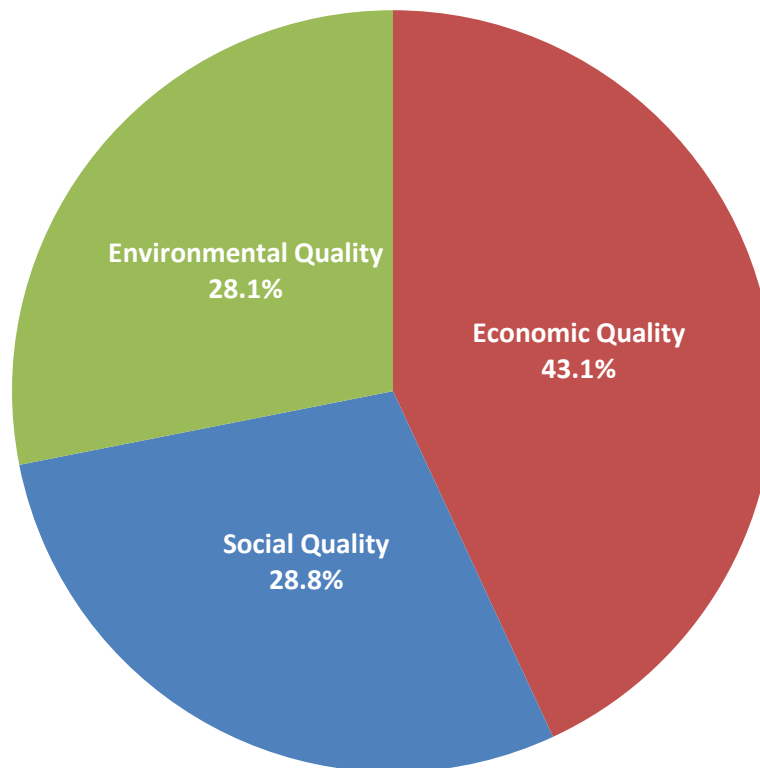
**Table 2: Community Development Indicator Rankings**

	<i>Indicator</i>	<i>Weight</i>	<i>Rank</i>
G1.	G1.I1 - Every new job generates additional jobs in the community	7.67%	3
	G1.I2 - New businesses return profits to the community	11.85%	1
	G1.I3 - New businesses hire locally	7.63%	4
	G1.I4 - New businesses buy locally	8.84%	2
	G1.I5 - New businesses increase the average local wage	7.11%	6
G2.	G2.I1 - New businesses do not pollute the water	7.00%	7
	G2.I2 - New businesses do not release toxic chemicals in the air	6.49%	9
	G2.I3 - New businesses are in compliance with hazardous waste management	6.46%	10
	G2.I4 - New businesses do not emit greenhouse gas	5.31%	12
	G2.I5 - New businesses do not develop undeveloped land	2.84%	15
G3.	G3.I1 - New businesses increase the local tax base	7.52%	5
	G3.I2 - New jobs are full-time	3.97%	14
	G3.I3 - New jobs offer benefits (health and/or retirement)	6.88%	8
	G3.I4 - New jobs provide training programs	4.00%	13
	G3.I5 - New businesses support community activities	6.42%	11

Number of observations	13
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# LOS ALAMOS COUNTY, NM COMMUNITY GOAL SURVEY

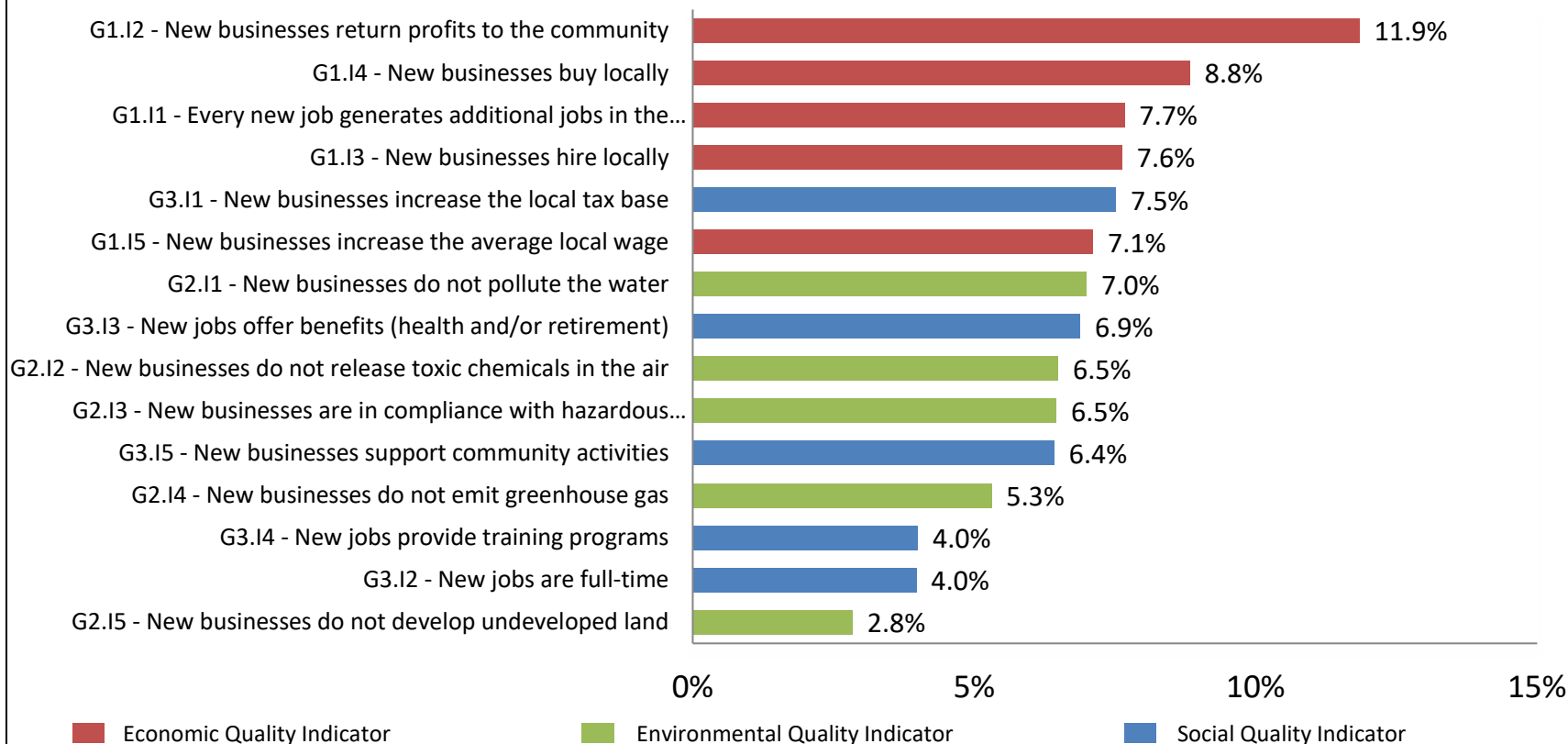
**Figure 1: Community Development Goal Weights:  
Los Alamos County, NM**



# LOS ALAMOS COUNTY, NM

## COMMUNITY GOAL SURVEY, CONT.

**Figure 2: Community Development Indicator Weights:  
Los Alamos County, NM**



# COMMUNITY ASSET INVENTORY

- Current and projected
  - Building space (retail, industrial, mfg., office)
  - Land (developed & undeveloped, ag and non-ag)
- Availability of infrastructure and services
  - Access to all types of transportation
  - Hi-tech
  - Water/sewer etc..
- Business and social indicators
  - Workforce (education, prevailing wage, etc..)



# COMMUNITY ASSET INVENTORY (1 OF 2)

Asset	Description	Source	Asset Values			Asset Value Basis	
			Los Alamos Co., NM	Baseline	Ratio	Los Alamos Co., NM	Baseline
S1	Local acreage available (private)	CAI	5,440	---	---		
S2	Local manufacturing space availability (sq ft)	CAI	-	---	---		
S3	Local warehouse availability (sq ft)	CAI	16,553	---	---		
S4	Local office space availability (sq ft)	CAI	638,241	---	---		
S5	Local retail space availability (sq ft)	CAI	638,241	---	---		
A1	Access within 30 minutes to interstate	CAI	No	---	---		
A2	Access within 30 minutes to package freight	CAI	No	---	---		
A3	Access within 30 minutes to railhead	CAI	No	---	---		
A4	Access within 30 minutes to rail freight	CAI	No	---	---		
A5	Access within 30 minutes to passenger air	CAI	No	---	---		
A6	Access within 30 minutes to port/harbor	CAI	No	---	---		
A7	Access within 30 minutes to international port	CAI	No	---	---		
A8	Access to natural gas pipeline	CAI	Yes	---	---		
A9 & A10	Driving miles to metropolitan area population > 50,000	CAI	34	282	12.057%	Santa Fe, NM	Glasgow, MT
A11	3-phase electric	CAI	Yes	---	---		
A12	Fiber optic lines	CAI	Yes	---	---		
A13	High-volume water supply	CAI	Yes	---	---		
A14	High-volume wastewater disposal	CAI	Yes	---	---		
A15	Solid waste disposal	CAI	Yes	---	---		
A16*	Cell phone service	CAI	N/A	N/A	N/A		
A17	Local public transportation	CAI	Yes	---	---		
A18	Expansion site	CAI	Yes	---	---		
A19	High-speed internet	CAI	Yes	---	---		



# COMMUNITY ASSET INVENTORY (2 OF 2)

Asset	Description	Source	Asset Values			Asset Value Basis	
			Los Alamos Co., NM	Baseline	Ratio	Los Alamos Co., NM	Baseline
A20	% of workforce with college degree or equivalent	CAI	0.665	0.785	84.713%		Falls Church City, VA
A21	% of workforce with HS degree or equivalent	CAI	0.978	0.988	98.988%		Falls Church City, VA
A22	% of workforce with less than HS degree	CAI	0.0022	0.664	0.331%		Kenedy Co., TX
A23	Prevailing yearly wage	CAI	\$ 78,830.00	\$ 78,830.00	100.000%		Los Alamos Co., NM
A24	Workers compensation tax rate	CAI	0.015	0.031	48.701%		NY
A25	Business income tax rate	CAI	0.054	0.100	53.554%		PA
A26*	Local and state government incentives	CAI	N/A	N/A	N/A		
A27*	Union labor	CAI	N/A	N/A	N/A		
A28	Specialized job training programs (excl. college and university)	CAI	Yes	---	---		
A29	Short- and long-term financing	CAI	Yes	---	---		
A30*	Business/trade association	CAI	N/A	N/A	N/A		
A31	Crime rate	CAI	0.007	0.083	8.384%		St. Louis, MO
A32	Median home price	CAI	\$ 292,200.00	\$ 1,251,200.00	23.354%		San Jose (et.al), CA MSA
A33	Air and water quality	CGS	8.9	---	---		
A34	Natural ecosystem	CGS	9.2	---	---		
A35	Outdoor recreation opportunities	CGS	9.3	---	---		
A36	Social and cultural opportunities	CGS	7.2	---	---		
A37	Retail shopping opportunities	CGS	3.5	---	---		
A38	Education system (K-12)	CGS	8.2	---	---		
A39	Access within 30 minutes to a college or university	CAI	Yes	---	---		
A40	Health care services	CGS	5.9	---	---		
A41	Public safety services (e.g. police, fire)	CGS	9.3	---	---		

\* = Not included in ASAP Model

CAI = Community Asset Inventory - values provided by steering committee; ratio values validated and modified where necessary

CGS = Community Goal Survey - average of all community survey rankings (1=lowest, 10=highest)

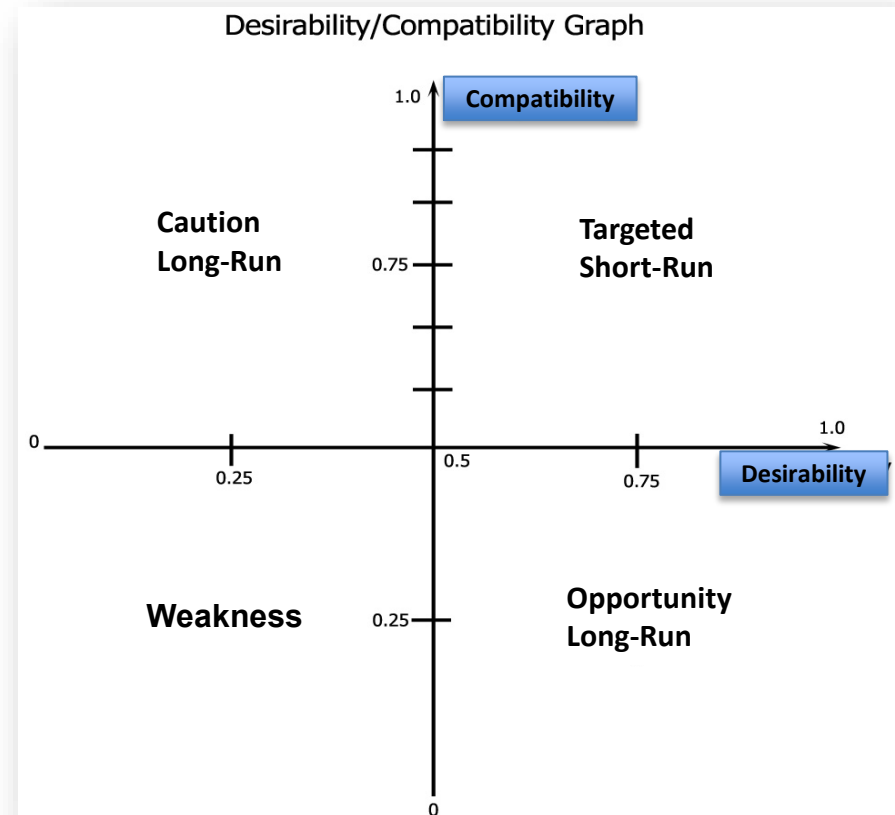
# NORTH AMERICAN INDUSTRY CLASSIFICATION SYSTEM – (NAICS)

- NAICS is the standard classification system used by federal agencies when reporting economics statistics related to business sectors.
- NAICS sectors can be aggregated at several different levels from 2-digit to 6-digit with the numerical NAICS code increasing as the business sector is further disaggregated.
- ASAP targeted sectors are reported using 2017 NAICS 4-digit level of aggregation.

NAICS Aggregation	NAICS Aggregation Description	NAICS Example	NAICS Example Sector Description
XX	Industry Sector (20 broad sectors up from 10 SIC)	11	Agriculture, Forestry, Fishing and Hunting
XXX	Industry Sub sector	111	Crop Production
XXXX	Industry Group	1113	Fruit and Tree Nut Farming
XXXXX	Industry	11133	Non-citrus Fruit and Tree Nut Farming
XXXXXX	U.S., Canadian or Mexican National specific	111331	Apple Orchards

# COMPATIBILITY AND DESIRABILITY INDEXES

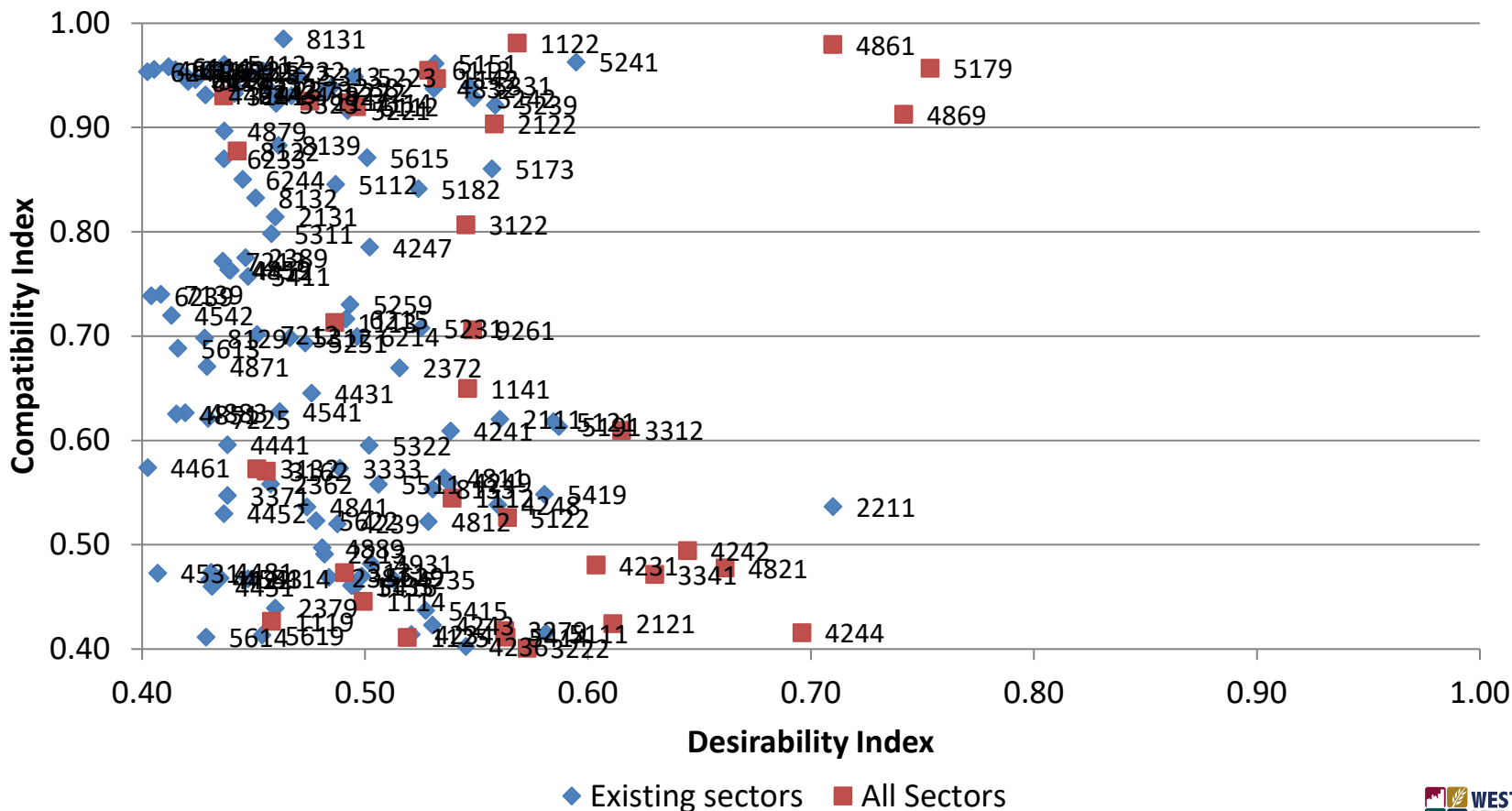
- Compatibility = community meets industry production requirements
  - Objective measures (assets)
- Desirability = industry meets community goals and priorities
  - Subjective measures (survey ranking)
- Remember 'C' before 'D'





# LOS ALAMOS COUNTY, NM – HIGH INDEX NAICS COMPATIBILITY AND DESIRABILITY >.40

**Figure 4: Los Alamos County, NM ASAP Results (Zoomed)**



# LOS ALAMOS COUNTY, NM – HIGH INDEX NAICS COMPATIBILITY AND DESIRABILITY >.40

**Table 4: Industries with High Desirability and Compatibility Index Scores ( Index > .40)**

NAICS3	Description	Count
<b>111</b>	<b>Crop Production</b>	<b>5</b>
112	Animal Production and Aquaculture	2
113	Forest and Logging	1
114	Fishing, Hunting and Trapping	2
211	Oil and Gas Extraction	1
212	Mining ( except Oil and Gas)	2
213	Support Activities for Mining	1
221	Utilities	2
236	Construction of Buildings	1
237	Heavy and Civil Engineering Construction	3
238	Specialty Trade Contractors	3
312	Beverage and Tobacco Product Manufacturing	1
313	Textile Mills	2
314	Textile Product Mills	1
316	Leather and Allied Product Manufacturing	1
322	Paper Manufacturing	1
327	Nonmetallic Mineral Product Manufacturing	1
331	Primary Metal Manufacturing	1
333	Machinery Manufacturing	1
334	Computer and Electronic Product Manufacturing	1
337	Furniture and Related Product Manufacturing	1
<b>423</b>	<b>Merchant Wholesalers, Durable Goods</b>	<b>5</b>
<b>424</b>	<b>Merchant Wholesalers, Nondurable Goods</b>	<b>7</b>
441	Motor Vehicle and Parts Dealers	1
442	Furniture and Home Furnishings Stores	2
443	Electronics and Appliance Stores	1
444	Building Material and Garden Equipment and Supplies Dealers	1
445	Food and Beverage Stores	2
446	Health and Personal Care Stores	1
448	Clothing and Clothing Accessories Stores	1
451	Sporting Goods, Hobby, Musical Instrument, and Book Stores	1
453	Miscellaneous Store Retailers	1
454	Nonstore Retailers	3
481	Air Transportation	2
482	Rail Transportation	1
483	Water Transportation	1



# LOS ALAMOS COUNTY, NM – HIGH INDEX NAICS COMPATIBILITY AND DESIRABILITY >.40

484	Truck Transportation	1
485	Transit and Ground Passenger Transportation	4
486	Pipeline Transportation	2
487	Scenic and Sightseeing Transportation	3
488	Support Activities for Transportation	3
493	Warehousing and Storage	1
511	Publishing Industries	1
512	Motion Picture and Sound Recording Industries	2
515	Broadcasting	1
517	Telecommunications	1
518	Data Processing, Hosting, and Related Services	2
519	Other Information Services	1
522	Credit Intermediation and Related Activities	3
523	Securities, Commodity Contracts, and Other Financial Investments and Related Activities	3
524	Insurance Carriers and Related Activities	2
525	Funds, Trusts, and Other Financial Vehicles	2
531	Real Estate	3
532	Rental and Leasing Services	2
533	Lessors of Nonfinancial Intangible Assets	1
<b>541</b>	<b>Professional, Scientific, and Technical Services</b>	<b>6</b>
551	Management of Companies and Enterprises	1
<b>561</b>	<b>Administrative and Support Services</b>	<b>5</b>
562	Waste Management and Remediation Services	3
<b>611</b>	<b>Educational Services</b>	<b>5</b>
621	Ambulatory Health Care Services	3
623	Nursing and Residential Care Facilities	4
624	Social Assistance	3
711	Performing Arts, Spectator Sports, and Related Industries	1
712	Museums, Historical Sites, and Similar Institutions	1
713	Amusement, Gambling, and Recreation Industries	1
721	Accommodation	2
722	Food Services and Drinking Places	1
811	Repair and Maintenance	1
812	Personal and Laundry Services	1
813	Religious, Grantmaking, Civic, Professional, and Similar Organizations	4
926	Administration of Economic Programs	1

# LOS ALAMOS COUNTY, NM– TARGET INDUSTRIES

Figure 5: Los Alamos County, NM ASAP Results (Targeted)



# LOS ALAMOS COUNTY, NM– TARGET INDUSTRIES

NAICS4	Description	Existing	DI	CI
1114	Greenhouse, Nursery, and Floriculture Production		0.4992	0.4459
2211	Electric Power Generation, Transmission and Distribution	X	0.7099	0.5365
2362	Nonresidential Building Construction	X	0.4576	0.5584
2373	Highway, Street, and Bridge Construction	X	0.4575	0.9357
3333	Commercial and Service Industry Machinery Manufacturing	X	0.4887	0.5734
3341	Computer and Peripheral Equipment Manufacturing		0.6299	0.4717
4871	Scenic and Sightseeing Transportation, Land	X	0.4291	0.6711
5121	Motion Picture and Video Industries	X	0.5845	0.6181
5179	Telecommunications		0.7534	0.9569
5182	Data Processing, Hosting, and Related Services	X	0.5239	0.8414
5191	Other Information Services	X	0.5869	0.6135
5414	Specialized Design Services		0.5632	0.4116
5415	Computer Systems Design and Related Services	X	0.5272	0.4370
5416	Management, Scientific, and Technical Consulting Services	X	0.4954	0.4602
5419	Other Professional, Scientific, and Technical Services	X	0.5805	0.5485
5615	Travel Arrangement and Reservation Services	X	0.5009	0.8712
6113	Colleges, Universities, and Professional Schools	X	0.5286	0.9550
6116	Other Schools and Instruction	X	0.4149	0.9555
6117	Educational Support Services	X	0.4207	0.9441
6214	Outpatient Care Centers	X	0.4965	0.6996
6215	Medical and Diagnostic Laboratories	X	0.4915	0.7164
6231	Nursing Care Facilities (Skilled Nursing Facilities)	X	0.4320	0.9557
6232	Residential Intellectual and Developmental Disability, Mental Health, and Substance Abuse Facilities	X	0.4418	0.9365
6233	Continuing Care Retirement Communities and Assisted Living Facilities for the Elderly	X	0.4367	0.8699
6241	Individual and Family Services	X	0.4024	0.9535
6243	Vocational Rehabilitation Services	X	0.4415	0.9326
7139	Other Amusement and Recreation Industries	X	0.4085	0.7402

# QUESTIONS?

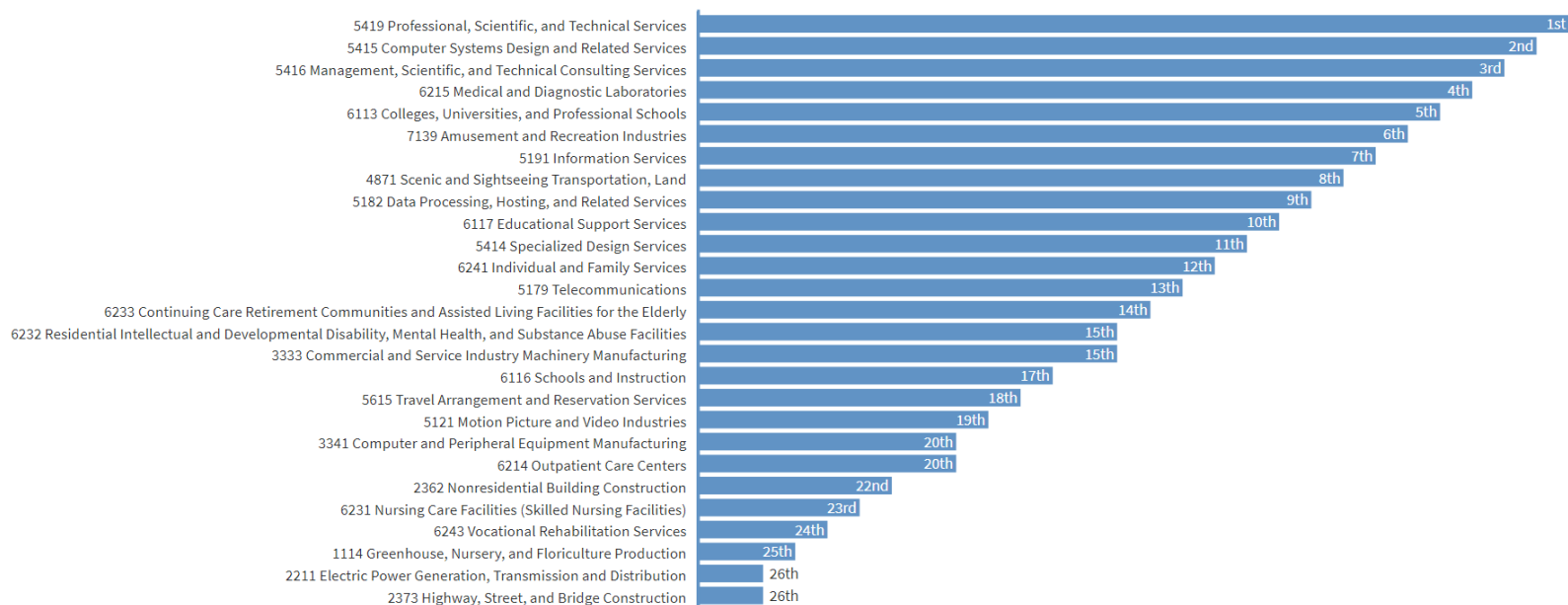
# TIME TO RANK THE SECTORS



# DISCUSSION

 **Poll locked.** Responses not accepted.

## Los Alamos 4DIG - Rank Target Industries



 **Poll Everywhere**

## WHAT'S NEXT?

- **Comprehensive Economic Development Strategy (CEDS)**
  - NCNMEDD will follow up with participants from the Roadshow meetings to review the draft CEDS
  - Specific section for each county
  - Target industries will be addressed for each county and the region as a whole
  
- **Implementation Strategies in Spring 2021**
  - Western Rural Development Center and NCNMEDD will reconvene Roadshow participants to discussion specific strategies for the target industries
  - In person meetings, if possible



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