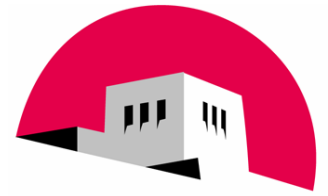


University of New Mexico  
Bureau of Business and Economic Research

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# CLOVIS MAINSTREET: COMMUNITY ECONOMIC ASSESSMENT

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# CLOVIS – COMMUNITY ECONOMIC ASSESSMENT

## 1. Demographics<sup>1</sup>:

- a. Clovis' population in 2000 was 32,540, three times larger than any other town in the New Mexico Eastern Plains region (NMEP) and second to only Roswell (45,451) in eastern New Mexico.<sup>2</sup> Between 1990 and 2000, Clovis' population grew by 5 percent, roughly on par with patterns in Curry County and the NMEP region, but well below the 20 percent increase in New Mexico as a whole. There is some evidence of a 'graying' of the local population – the senior population is the fastest growing cohort, more households now receive incomes from social security and retirement, and fewer receive income from employment than ten years ago. However, the trend is far less pronounced in Clovis than in other, more rural communities within the NMEP region and is offset by a reasonably strong 7 percent growth in the number of children under 18 years old.
- b. The racial and ethnic composition of Clovis' population, as of 2000, was 56 percent White/non-Hispanic; 33 percent Hispanic, and about 6 percent Black or African American/non-Hispanic. As in nearly every community in New Mexico, the trend is toward a greater Hispanic presence. During the 10-year period from 1990 to 2000, the Hispanic community was the only segment of the population to grow, up by 7 percent. By contrast, the White/Non-Hispanic population fell by more than 20 percent and the Black/non-Hispanic population fell by 5 percent. It is important to note that the growth of the Hispanic population in Clovis is not exceptional – the rate of growth of this population matches that of the state and is well below the 61 percent increase throughout the U.S. Rather, it is the decline in the non-Hispanic population that accounts for the increase of the Hispanic population as a share of the total.
- c. The improvement in level of educational attainment in Clovis is consistent with that of other parts of the NMEP region, but given the city's role as a regional center, the failure to exceed these standards is disappointing. The problem is greatest at the higher levels of education. The proportion of the 25 years old and over population without a high school degree is only slightly higher than the statewide rate; however, only 23 percent of the same population has a post-secondary degree, well below the statewide

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<sup>1</sup> See Table 1 in the appendix. Local area demographic, housing, and economic data is not available beyond the 2000 Decennial Census.

<sup>2</sup> For the purposes of this report, the NMEP is comprised of Curry, Roosevelt, Guadalupe, De Baca and Quay Counties.

rate of 29 percent and only slightly higher than the overall average for the region. This is important because, as is described later in this report, Clovis is failing to live up to its potential as the higher-order service center in the region, a function that requires higher levels of educational attainment in order to meet the demand for more numerous managerial and professional occupations.

## 2. Housing<sup>3</sup>:

- a. Between 1990 and 2000, Clovis' housing stock grew by 10 percent, slightly ahead of the 7 percent increase in new household formation. Growth was much stronger in the rental sector (13 percent) than in the owner-occupied sector (3 percent). Vacancy rates were somewhat high, especially for owner-occupied housing, but certainly within reasonable bounds.
- b. The slightly high vacancy rates, again especially for owner-occupied units, helped to keep housing prices down. Between 1990 and 2000, real property values (corrected for inflation) in Clovis fell by 9 percent for owner-occupied units while rents (again, corrected for inflation) fell by 3 percent. Low property values made housing more affordable. The cost of homeownership fell slightly over the 10 year period, settling at just over 20 percent of the median household income, while ownership costs for the state and the US continued to rise. Likewise, the cost of renting declined, to just over 25 percent of the median household income.
- c. Consistent and comparable data on housing costs are not available beyond 2000. In most places, however, property values have risen sharply, while builders have been slow to respond in areas outside the principal metropolitan areas. The result is tightening housing markets.

## 3. Income<sup>4</sup>: As of 2000, the average per capita income in Clovis was \$15,561, about 9 percent below the statewide level but above the \$14,591 average for the NMEP region. Growth in individual incomes between 1990 and 2000 was strong.

- a. Between 1990 and 2000, correcting for inflation, average per capita incomes in Clovis increased by 17 percent, slightly better than the regional 15.7 percent and statewide 15 percent increases. As in all parts of the country, Clovis residents are forming smaller households, with fewer workers in the average household. Also, in Clovis as in other areas, there was an increasing disparity in

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<sup>3</sup> See Table 1 in the appendix. As housing patterns are quicker to change than demographic and most economic data, generalizations about housing based on 2000 data must be interpreted with caution.

<sup>4</sup> See Table 1 in the appendix.

incomes, with some realizing significant gains while the incomes of many others have remained flat. For these reasons, the strong increase in per capita incomes did not translate into a similar increase in median household incomes. The median household income increased by 2 percent between 1990 and 2000.

- b. Poverty levels remain high in Clovis. In 2000, 21 percent of the town's residents – more than one in five – lived below the poverty line.<sup>5</sup> This was slightly higher than the 20.2 percent rate for the NMEP region and well above the 18.4 percent rate for the state. In all, the number of persons living below the poverty line in Clovis increased from 6,551 in 1990 to 6,698 in 2000, an increase of 147 persons.
- c. Part of the reason for the slow growth of median household incomes and the failure of the poverty rate to decline pertains to the structure of earnings in Clovis. In 2000, a smaller proportion of households in Clovis received incomes from earnings, which include wages, salaries, and profits from proprietary businesses – from just under 78 percent in 1990 to about 76 percent in 2000. Conversely, the share of households receiving incomes from social security and/or retirement increased.

**4. Economy<sup>6</sup>:** Clovis serves as a principal center for the NMEP region. However, given the advantages of its situation and the proximity of major employers such as Cannon Air Force Base (AFB), the local economy under-performs with respect to expectations. As a whole, the pull factor for Clovis' economy in 2005 was 95 percent, resulting in leakages of about \$36 million (with respect to the state of New Mexico).<sup>7</sup> Review of historical data, back to 1989, reveals a steady erosion of the capacity of Clovis' economy to generate the surplus revenues needed to spur economic growth.

- a. Trade area: Clovis' trade area, which expands into Texas, is mostly rural, relatively low income, and expansive, stretching as much as an hour in some directions. The population of the trade area is about 80,000. The area is constrained to the northeast and

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<sup>5</sup> In 2000, the Census Bureau defined the poverty line at \$13,861 for a family of three, including one child; in 2006 the poverty line was set at \$16,277.

<sup>6</sup> Tables and figures to correspond to this section can be found in the appendix. See tables 3 and 4 and figures 1 and 2 for Clovis' regional and local trade area data; see tables 5-7 and figure 3 for gross receipts data; see tables 8-10 and figure 4 for location quotient data.

<sup>7</sup> A 'pull factor' measures the capacity of an economy or industry to generate revenues and economic growth. A local industry that generates gross receipts proportionate to the state average (corrected for level of incomes within the economy) has a pull factor of 100 percent; values above 100 percent reflect the capacity of the sector to draw new revenues into the economy and values below 100 percent reflect a loss (or 'leakage') of revenues. In theory, local economic growth is, in part, a function of the capacity of a community to generate a surplus of revenues.

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southeast by the cities of Amarillo and Lubbock, respectively, and to the southwest by Roswell. Residents of the rural parts of the trade area travel to Clovis for middle- and some higher-order goods and services – those that are infrequently purchased and somewhat expensive. Only for very high-order goods and services, such as specialized professional or medical services and expensive, rarely-purchased durable goods, are residents likely to make the two-hour trip to Lubbock or Amarillo.

- b. Strengths: Clovis' principal economic advantage lies in its very expansive trade area, which establishes the city as a principal retail and service center for New Mexico's eastern plains and the Texas counties of Parmer and Bailey.
  - i. In 2005, Clovis' retail pull factor was about 129 percent, meaning that for every \$1 spent by Clovis residents outside the community, another \$1.29 was spent in town by residents of other areas. The pull factors of disaggregated retail groups generally confirm Clovis' role as a higher-order regional center – the high values are for bigger ticket sectors such as building supplies (pull factor of 341 percent, \$7.2 million in surplus gross receipts), clothing accessory stores (typically specialty stores, 160 percent, \$4.2 million), automobile dealers (133 percent, \$1.2 million) as well as 'Big Box' miscellaneous store retailers (127 percent; \$37 million).
  - ii. Healthcare and social assistance, anchored by the Plains Regional Medical Center, draws significant revenues to the city (pull factor 141 percent, \$13.3 million in surplus revenues), as do information and cultural industries (147 percent, \$6.5 million). Eating and drinking establishments also perform well (160 percent, \$20 million).
  - iii. The Cannon AFB also contributes significantly to the local economy, accounting for nearly 4,000 jobs. In June 2006, Cannon AFB was re-assigned to the Air Force Special Operations Command, ensuring, and likely increasing, employment at the facility. The impact of the AFB on Clovis' economy is channeled mainly through the local expenditure of the wages.
  - iv. New industrial developments, including Southwest Cheese, Mesa Ingredient, and American Renewable Fuels, will contribute to the economic base of Clovis and its immediate area, creating jobs and increasing demand for regional agricultural products. In addition, the local construction economy is receiving a boost from both the expansion of Burlington Northern Santa Fe rail yards and new investments in Cannon AFB. These developments are very

timely, given the recent weakness of the region's manufacturing and construction sectors.

- c. Weaknesses: With gaps in the manufacturing and construction sectors being addressed, the remaining weakness of the Clovis economy is in the broad area of management and professional services (not including healthcare, which performs well). This is very surprising given the role of the city as an economic center of a relatively expansive area.
- i. In 2005, professional, scientific, and technical services had a pull factor of only 51 percent, resulting in a leakage of nearly \$32 million. Similarly, real estate receipts were only 56 percent of benchmark levels, resulting in \$4.7 million in leakages, and finance and insurance receipts were only 71 percent of expectations, with \$1.2 million in leakages.
  - ii. Arts, entertainment, and recreation industries generated only \$624 thousand in receipts in 2005, with a pull factor of only 28 percent, resulting in leakages of nearly \$1.6 million. Located well away from principal transportation routes and without major visitor destinations, receipts of accommodations were only \$4.7 million.
  - iii. The weakness of professional services is also reflected in Clovis' occupational structure. Relative to the NMEP region as a whole, employment in management, business, and financial occupations is only 88 percent, indicating that these jobs are more commonly found in other parts of the NMEP region (relative to total employment).<sup>8</sup> Likewise, professional occupations are slightly under-represented (99 percent). Office and administrative support occupations, a good indicator of the health of the 'white collar' sector, is less than proportionate (97 percent). While these values are not inordinately low (values of the base geography are 100 percent, by definition), values are below 1.0 in Clovis – the principal center of the NMEP region – an unmistakable sign that this critical sector is under-performing.
  - iv. Related to the under-performance of the professional sector is the relatively low level of educational attainment in Clovis, as discussed above in the demographic section. The relationship between the two aspects is dynamic – low levels of educational attainment makes the performance of

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<sup>8</sup> See Table 9. Location quotients indicate the ratio of employment by occupation relative to the base geography (Curry County, Eastern Plains, or New Mexico). A value of 1.0 indicates that employment in a given occupation in the local economy, relative to total employment, is in proportion to that of the base geography; values greater than 1.0 indicate a higher share, and less than 1.0 indicates a less than proportionate share.



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professional services difficult, while a weak professional economy discourages individuals with higher levels of educational attainment from remaining in the local workforce.

- 5. MainStreet<sup>9</sup>:** Clovis' MainStreet district encompasses a 30 square-block area, from 14<sup>th</sup> street south to the railroad tracks, from Connelly east to as far as Axtell Street. The economic structure of the district is characteristic of many downtown areas, with concentrations of employment in public administration (especially municipal school administration), finance, insurance, and professional services. The residential community is very small, with comparatively low incomes and with a somewhat larger than proportionate Hispanic population.
- a. In 2005, 149 businesses were located in the MainStreet district – 14 percent of all Clovis businesses; these businesses employed 1,470 workers, 11 percent of the total; wages paid by MainStreet employers were slightly higher than those paid by employers in other parts of town.
  - b. Just over one quarter of those working in the MainStreet area are employed by the public sector. The employers include Clovis Municipal Schools, the New Mexico 9<sup>th</sup> District Court, Curry County Court, Clovis Municipal Court; the city of Clovis, and Curry County governments. Beyond the public sector are businesses engaged in finance (NAICS 522), insurance (NAICS 524), publishing (NAICS 511, including the *Clovis News Journal*), and professional, scientific, and technical services ((NAICS 541). The retail sector is relatively small, with 33 registered businesses employing just over 200 employees and 5 restaurants employing 82 workers. There are no accommodations in the MainStreet district.
  - c. The relatively diverse structure of the MainStreet community and the presence of the public sector provide stability to the district's economy. The large number of professional-sector businesses also generates demand for services, creating a dense, interconnected network of businesses. Yet, there are significant opportunities for expansion, especially in retail, accommodations, and the restaurant sector.
  - d. Table 4 provides more detailed demographic information for the downtown residential community. The data does not correspond narrowly to the MainStreet area, but the first column does cover the downtown area within a one minute drive to the center of the MainStreet district, with about a ½ mile radius. A map of the area is shown in figure 2. The population of the downtown is small, only 856 persons or 3.5 percent of Clovis' total population. Hispanics are

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<sup>9</sup> See tables 11-13 and figures 5 and 6 in the appendix.

somewhat better represented downtown, with 53 percent of the population. The downtown residential community has relatively fewer children and seniors and comparatively more young adults between 18 and 40 years old. This is characteristic of many downtown communities. Incomes of those living downtown are well below the city average – average per capita income is 30 percent lower than the city average; average household income is 33 percent lower. To an even greater degree, the net worth of households downtown is lower than the city's households – by more than 50 percent – reflecting lower levels of equity in homeownership.

- e. Retail expenditures of the downtown community total about \$2.5 million per year; housing expenditures total an additional \$1.4 million; and groceries (food at home) add \$585 thousand. Compared to other parts of the city, downtown residents spend comparatively more on electronics, groceries, eating in restaurants, school books, and apparel and comparatively less on housing, outside entertainment, transportation, and healthcare. Again, these patterns are consistent with a population of young adults.

## **6. Opportunities and Challenges:**

- a. As of 2005, the net pull factor for Clovis' economy was 95 percent, resulting in a net leakage of \$35 million. Leakages were greatest in base industries such as manufacturing and construction, and in higher-order services, such as professional, scientific and technical services, finance, and real estate. Recent developments will help to shore up the manufacturing sector and, in turn, spur retail activity as wages flow through the local economy. However, weaknesses in higher-order services will require deeper and longer-term corrections, particularly with regard to the capacity of the workforce.
- b. The MainStreet district has a significant role to play in the development of Clovis' professional service economy. The area already features a strong cluster of information services, finance and insurance, professional and technical services, and public administration. It would make sense to build upon this foundation, deepening the advantages of complementarity. Beyond a direct attempt to recruit similar businesses, three strategies should be considered:
  - i. Strengthen the amenity service sector. Restaurants, arts and entertainment, specialty retail, and personal services can help to make the area more attractive to a professional workforce, and thus more attractive to professional employers. Currently, such businesses are all but absent. Employment in restaurants accounts for only 6 percent of the

city's total; there are very few specialty retail stores, no arts and entertainment facilities, and no personal care shops (beauty parlors, etc).

- ii. Develop a small hotel. The density of professional businesses in the MainStreet area provides a market for downtown accommodations, and in turn, accommodations would deepen the market for restaurants and bars, specialty retail, and arts and entertainment. Clayton, Artesia, Las Vegas, and Silver City – all much smaller than Clovis – have successfully developed small “boutique” accommodations in their MainStreet districts.
  - iii. Develop mid- and upper mid-market residential properties. Existing residential properties in Clovis' downtown area are generally low quality and do not meet the needs of professional workers. Employees in Clovis' downtown professional services businesses and institutions would provide a market for higher quality and higher density residential properties downtown. Land and second story vacancies are available for such development.
- c. Each of the above opportunities would serve to strengthen the professional service sector that already exists in Clovis' MainStreet district, helping to address one of the principal weaknesses of the city's economy as a whole. Further, these opportunities would help to expand the lifecycle of downtown from the current 40 hour workweek to include evenings and weekends, opening up new markets for restaurants, arts, entertainment, specialty retail, and other amenities.

## EXPLANATION OF TABLES

### **Selected Demographic, Economic, and Housing Characteristics**

Source: US Census Bureau, 1990 & 2000 Decennial Census.

Data is provided for your community, county, and the state of New Mexico for the years 1990 and 2000. For the city and county, values are given in absolute terms and in percentages. For comparison, data is also provided for the county, region, and the state of New Mexico.

Eastern Plains Region is classified as Curry, De Baca, Guadalupe, Quay, and Roosevelt counties.

### **Taxable Gross Receipts and Pull Factors**

Source: New Mexico Taxation and Revenue Department (NMTRD); calculations by UNM/BBER. Data is provided for the years 1989 and 2002 (SIC classification) and 2005 (NAICS classification).

In 2003, NMTRD switched from SIC (Standard Industrial Classification) to NAICS (North American Industrial Classification System) as a basis for statistical tabulation. It is not possible to compare most data from the two classification systems. Data from 1989 and 2002 are presented to allow for historical comparison. Data from 1989 is adjusted for inflation and is presented in 2002 dollars. Data from 2005 provides the most up-to-date account of gross receipts activities; the data is presented in 2005 dollars.

There are several problems associated with gross receipts data.

- The data does not account for the value of the products sold. Rather data is categorized according to the type of business, i.e., sales of food from gasoline convenience stores are included in gasoline stations; groceries sold at Wal-Mart are included in Miscellaneous Retailers.
- Businesses are self-classified, and sometimes inaccurately so.
- Not all products are taxable as gross receipts in New Mexico; a notable example is gasoline. 2005 data includes both taxable gross receipts and deductions associated with food and medical spending.

A 'pull factor' indicates the capacity of an industrial sector (e.g., services, retail, and so on) to draw revenues into the local economy. A value of 100% is the break-even point – values greater than 100% indicate that the business sector is drawing revenues into the local economy (more money is spent in the economy by those whose income is earned outside the community than money is spent by locals outside the community), whereas values less than 100% indicate that the sector is leaking money to other communities. Net gain/loss is derived from the pull factors. It is calculated as the difference between actual gross receipts and the 'expected value' of gross receipts (i.e., that which would be associated with a

pull factor of 100%). As with all 1989 gross receipts data, it is presented in terms of 2002 dollars.

Note that it is natural that not all sectors will have a positive balance – every economy has its strengths and weaknesses. From a policy perspective, policies that reduce leakages and that exploit strengths are equally valid. The decision is a practical one – should energies be spent plugging holes or exploiting existing strengths?

### **Businesses by Industry, in MainStreet Service Area, 1995 and 2004**

Source: NM Department of Labor, ES-202 (Covered Employment Statistics), 2005; calculations by UNM-BBER.

ES-202 data is provided to UNM-BBER by the New Mexico Department of Labor under terms of confidentiality. Under the terms of this agreement, data can be reported only in aggregate or summary format, so that it is not possible to infer information pertaining to a specific business.

ES-202 data used in this report is ‘establishment-level’, meaning that UNM-BBER has information on industrial classification (NAICS), employment, and wages of each business establishment in the study area. Establishment-level data indicates that data is provided for each individual establishment; i.e., as opposed to a chain or brand. The key advantage of establishment-level data is that UNM-BBER is able to code the data according to the specific address of the establishment, allowing for analysis on a micro-geographical scale. In this report, UNM-BBER has coded the data according to locations within the MainStreet district (MS), in other parts of the town (town name) or in unincorporated parts of the county (COUNTY).

### **Location Quotients**

Source: Census 2000 Summary File 3 (SF3); Tables 59-61. Calculations by UNM-BBER.

A location quotient indicates the relative concentration of employment by industry, occupation, and type of business ownership in a given community, county, or region. The measures are relative to that of a ‘base geography’. A location quotient is calculated as the ratio of local employment in a given industry, occupation, or ownership type to total employment, in relation to the same ratio for the base geography. Thus, a value of 1.00 indicates that employment for a given industry, occupation, or type of business ownership compared to total employment in the economy is in exact proportion to that of the base geography. Values greater than 1.00 indicate that the industry, occupation, or ownership is more than proportionate to that of the base geography; a value less than 1.00 indicates the opposite. The location quotient can be used to indicate the structure or ‘role’ of a local economy within its larger geography. This applies equally to the role of a town’s economy within the county, region, or state; a county’s economy within the state; or a region’s (multiple counties) economy within the state. As with pull factors, a location quotient helps to define

the relative strengths and weaknesses of a local economy, measured in this case in terms of industrial, occupational, and ownership structures. Again, as with pull factors, this information can lead to policies that aim to strengthen weaknesses or exploit strengths; the decision is again one of practicality and strategy rather than theory.

NOTE: Charts of location quotients are scaled to a value of 0, where this base indicates that employment for a given industry is the same proportion as the base geography. This is done for presentational purposes.

### **Trade Area**

Sources: New Mexico Department of Labor, ES-202 (Covered Employment Statistics), 2005; Bureau of Labor Statistics, Product Line Data, calculations by UNM-BBER; ESRI® ArcGIS 9.0 Business Analyst; ESRI® StreetMap™ USA. ESRI data sources include: Bureau of Labor Statistics, Consumer Expenditure Surveys (CEX), 2001, 2002, and 2003; U.S. Bureau of the Census, Population Division. (“ESRI® Demographic Update Methodology 2006/2011, An ESRI® White Paper,” Redlands, CA, June 2006.)

Market or trade areas were established by generating drive time polygons around each city, the foci being the MainStreet districts. A target location was established for each MainStreet area based upon descriptions and maps provided by each of the New Mexico MainStreet (NMMS) cities. This provided a representative focal point within the MainStreet boundaries, without specifying any one particular location.

Trade areas were based upon drive times to the MainStreet site. Drive time polygons are generated using actual street networks in ESRI StreetMap. Drive times are calculated using road access, road types, and speed limits. Trade areas were determined by creating drive time polygons on two different scales, local and regional. A local scale polygon was drawn for the area that would be within a 1 minute drive time, or about ½ mile walking distance, from the MainStreet site. Additional polygons were calculated at the local scale for 3 and 5 minute drive times. These times were chosen to reflect a short and convenient route from a home or hotel. On a regional scale, drive time polygons were calculated for times ranging from 5 to 45 minutes. The regional scale represents travel for dedicated purposes, such as supply replenishment, large item purchases, etc.

Trade area reports were generated for each of the drive time polygons. Reports included demographic, marketing, and retail expenditure data. The data is directly associated with the geographic areas overlaid by the drive time polygons. All of the population and marketing data for a particular polygon is representative of the people living within the boundaries of that region. This data is derived from the ESRI® ArcGIS 9.0 Business Analyst. The population data provided by this program are geographically derived at the census block point level. The

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demographic, income, and expenditure data and projections utilized by ESRI® are derived from the U.S. Census Bureau and the Bureau of Labor Statistics' Consumer Expenditure Surveys.

The competition layers represented in the trade area analyses were derived from the New Mexico Department of Labor data combined with product line data from the Bureau of Labor Statistics. The proxy revenues, calculated by BBER, reflect the degree to which the competition has derived sales from the product line of interest.

**APPENDIX: TABLES AND FIGURES**



CLOVIS MAINSTREET – Community Economic Assessment

**TABLE 1: SELECTED DEMOGRAPHIC, ECONOMIC, AND HOUSING CHARACTERISTICS**

|  | CLOVIS |        |            | CURRY COUNTY | EASTERN PLAINS | NEW MEXICO |
|--|--------|--------|------------|--------------|----------------|------------|
|  | 1990   | 2000   | Change (%) | 2000         | 2000           | 2000       |
| <b>POPULATION</b>  |        |        |            |              |                |            |
| Total Population   | 30,954 | 32,540 | 5%         | 45,044       | 80,137         | 1,819,046  |
| Urban  | 100%   | 100%   |            | 85%          | 73%            | 75%        |
| Rural  | 0%     | 0%     |            | 15%          | 27%            | 25%        |
| Households   | 11,623 | 12,468 | 7%         | 16,813       | 30,236         | 678,032    |
| Household Size (Average)   | 2.64   | 2.56   | -3%        | 2.61         | 2.56           | 2.63       |
| <b>AGE</b>   |        |        |            |              |                |            |
| Under 5 yrs  | 8%     | 8%     |            | 8%           | 7%             | 7%         |
| 5 to 17 y/o  | 21%    | 22%    |            | 22%          | 21%            | 21%        |
| 18 to 64 y/o   | 58%    | 57%    |            | 59%          | 58%            | 60%        |
| 65 yrs and over  | 12%    | 13%    |            | 11%          | 13%            | 12%        |
| <b>RACE &amp; ETHNICITY<sup>1</sup></b>                          |        |        |            |              |                |            |
| White, non-Hispanic  |        | 56%    |            | 59%          | 57%            | 45%        |
| Black or African American, non-Hispanic                          |        | 6%     |            | 6%           | 4%             | 2%         |
| Native American, non-Hispanic                                    |        | 1%     |            | 1%           | 1%             | 9%         |
| Hispanic or Latino (of any race)                                 | 26%    | 33%    |            | 30%          | 35%            | 42%        |
| Speak Spanish, linguistically isolated <sup>2,4</sup>            | 3%     | 1%     |            | 1%           | 2%             | 2%         |
| Speak other than Spanish, linguistically isolated <sup>2,4</sup> | 0%     | 0%     |            | 0%           | 0%             | 1%         |
| <b>EDUCATIONAL ATTAINMENT</b>                                    |        |        |            |              |                |            |
| Population 25 yrs or older                                       | 18,681 | 19,797 | 6%         | 26,403       | 48,301         | 1,134,801  |
| Less than high school graduate <sup>3</sup>                      | 26%    | 22%    |            | 22%          | 24%            | 21%        |
| High school graduate; and some college <sup>3</sup>              | 56%    | 54%    |            | 55%          | 54%            | 49%        |
| Associate, bachelor's, or graduate degree <sup>3</sup>           | 19%    | 23%    |            | 23%          | 23%            | 29%        |
| <b>MIGRATION</b>   |        |        |            |              |                |            |
| Moved since 1985/1995 <sup>2</sup>                               | 14,490 | 15,155 | 5%         | 21,141       | 35,091         | 731,488    |
| Moved to new house in county since 1985/1995 <sup>2</sup>        | 26%    | 30%    |            | 26%          | 24%            | 24%        |
| Moved into county since 1985/1995 <sup>2</sup>                   | 25%    | 20%    |            | 25%          | 24%            | 20%        |
| <b>TRAVEL TO WORK</b>  |        |        |            |              |                |            |
| Less than 15 minutes   | 59%    | 63%    |            | 63%          | 65%            | 40%        |
| 15-29 minutes  | 31%    | 31%    |            | 31%          | 29%            | 48%        |
| More than 30 minutes   | 10%    | 5%     |            | 6%           | 7%             | 13%        |

<sup>1</sup> Racial breakdown by ethnicity not available in the 1990 decennial census. Categories may not sum to 100% because some racial groups were left out.

<sup>2</sup> Includes persons 5 y/o and older.

<sup>3</sup> Includes persons 25 y/o and older.

<sup>4</sup> A household in which all members 14 years old and over speak a non-English language and also speak English less than "very well" (have difficulty with English).

CLOVIS MAINSTREET – Community Economic Assessment

**TABLE 1: SELECTED DEMOGRAPHIC, ECONOMIC, AND HOUSING CHARACTERISTICS, CONTINUED**

|  | CLOVIS |        |            | CURRY COUNTY | EASTERN PLAINS | NEW MEXICO |
|--|--------|--------|------------|--------------|----------------|------------|
|  | 1990   | 2000   | Change (%) | 2000         | 2000           | 2000       |
| <b>HOUSEHOLD INCOME &amp; POVERTY</b>                  |        |        |            |              |                |            |
| Real per capita income (1999 dollars)                  | 13,349 | 15,561 | 17%        | 15,049       | 14,591         | 17,261     |
| Median household income (1999 dollars)                 | 28,324 | 28,878 | 2%         | 28,917       | na             | 34,133     |
| Households with earnings                               | 78%    | 76%    |            | 79%          | 77%            | 80%        |
| Households with social security income                 | 27%    | 28%    |            | 26%          | 29%            | 25%        |
| Households: with interest; dividends; or rental income | 36%    | 24%    |            | 24%          | 25%            | 30%        |
| Households with public assistance income               | 10%    | 7%     |            | 6%           | 5%             | 5%         |
| Households with retirement income                      | 16%    | 17%    |            | 15%          | 16%            | 17%        |
| Persons below the poverty line                         | 6,551  | 6,698  | 2%         | 8,327        | 16,179         | 328,933    |
| Poverty rate   | 21.4%  | 21.0%  |            | 19.0%        | 20.2%          | 18.4%      |
| <b>LABOR CHARACTERISTICS</b>                           |        |        |            |              |                |            |
| In labor force (population 16 yrs and over)            | 14,134 | 14,256 | 1%         | 20,707       | 35,915         | 834,632    |
| Unemployment rate                                      | 7.5%   | 6.6%   |            | 6.1%         | 6.4%           | 7.2%       |
| <b>HOUSING CHARACTERISTICS</b>                         |        |        |            |              |                |            |
| Total housing units (#)                                | 12,978 | 14,295 | 10%        | 19,212       | 36,089         | 780,579    |
| Home ownership (%)                                     | 61%    | 59%    |            |              | 60%            | 68%        |
| Owner-occupied housing units                           | 7,500  | 7,746  | 3%         | 9,957        | 19,028         | 474,435    |
| Vacancy rate (for sale)                                |        | 5.7%   |            | 5.1%         | 4.5%           | 2.5%       |
| Renter-occupied housing units                          | 4,176  | 4,714  | 13%        | 6,809        | 11,155         | 203,536    |
| Vacancy Rate (for rent)                                |        | 12.2%  |            | 10.1%        | 11.5%          | 11.6%      |
| Median age of housing structures                       | 25     | 32     |            | 31           | na             | 23         |
| <b>HOUSING AFFORDABILITY</b>                           |        |        |            |              |                |            |
| Median value of owner-occupied housing (1999 dollars)  | 68,735 | 62,300 | -9%        | 61,800       | na             | 94,600     |
| Median costs of homeownership (% of income)            | 20.6%  | 20.2%  |            | 20.3%        | na             | 22.2%      |
| Median rent (1999 dollars)                             | 442    | 428    | -3%        | 427          | na             | 503        |
| Median cost of rental housing (% household income)     | 26.9%  | 25.1%  |            | 24.9%        | na             | 26.6%      |

Source: US Census Bureau, 1990 and 2000 Decennial Census; calculations by BBER, 2007.

CLOVIS MAINSTREET – Community Economic Assessment

**TABLE 2: SELECTED DEMOGRAPHIC, ECONOMIC, AND HOUSING CHARACTERISTICS – ROOSEVELT COUNTY**

|  | ROOSEVELT<br>COUNTY | EASTERN<br>PLAINS | NEW<br>MEXICO |
|--|---------------------|-------------------|---------------|
|  | 2000                | 2000              | 2000          |
| <b>POPULATION</b>  |                     |                   |               |
| Total Population   | 18,018              | 80,137            | 1,819,046     |
| Urban  | 64%                 | 73%               | 75%           |
| Rural  | 36%                 | 27%               | 25%           |
| Households   | 6,630               | 30,236            | 678,032       |
| Household Size (Average)   | 2.60                | 2.56              | 2.63          |
| <b>AGE</b>   |                     |                   |               |
| Under 5 yrs  | 8%                  | 7%                | 7%            |
| 5 to 17 y/o  | 20%                 | 21%               | 21%           |
| 18 to 64 y/o   | 60%                 | 58%               | 60%           |
| 65 yrs and over  | 12%                 | 13%               | 12%           |
| <b>RACE &amp; ETHNICITY<sup>1</sup></b>                          |                     |                   |               |
| White, non-Hispanic  | 63%                 | 57%               | 45%           |
| Black or African American, non-Hispanic                          | 2%                  | 4%                | 2%            |
| Native American, non-Hispanic                                    | 1%                  | 1%                | 9%            |
| Hispanic or Latino (of any race)                                 | 34%                 | 35%               | 42%           |
| Speak Spanish, linguistically isolated <sup>2,4</sup>            | 2%                  | 2%                | 2%            |
| Speak other than Spanish, linguistically isolated <sup>2,4</sup> | 0%                  | 0%                | 1%            |
| <b>EDUCATIONAL ATTAINMENT</b>                                    |                     |                   |               |
| Population 25 yrs or older                                       | 10,245              | 48,301            | 1,134,801     |
| Less than high school graduate <sup>3</sup>                      | 25%                 | 24%               | 21%           |
| High school graduate; and some college <sup>3</sup>              | 47%                 | 54%               | 49%           |
| Associate, bachelor's, or graduate degree <sup>3</sup>           | 28%                 | 23%               | 29%           |
| <b>MIGRATION</b>   |                     |                   |               |
| Moved since 1985/1995 <sup>2</sup>                               | 8,146               | 35,091            | 731,488       |
| Moved to new house in county since 1985/1995 <sup>2</sup>        | 23%                 | 24%               | 24%           |
| Moved into county since 1985/1995 <sup>2</sup>                   | 26%                 | 24%               | 20%           |
| <b>TRAVEL TO WORK</b>  |                     |                   |               |
| Less than 15 minutes   | 64%                 | 65%               | 40%           |
| 15-29 minutes  | 29%                 | 29%               | 48%           |
| More than 30 minutes   | 7%                  | 7%                | 13%           |

<sup>1</sup> Racial breakdown by ethnicity not available in the 1990 decennial census. Categories may not sum to 100% because some racial groups were left out.

<sup>2</sup> Includes persons 5 y/o and older.

<sup>3</sup> Includes persons 25 y/o and older.

<sup>4</sup> A household in which all members 14 years old and over speak a non-English language and also speak English less than "very well" (have difficulty with English).

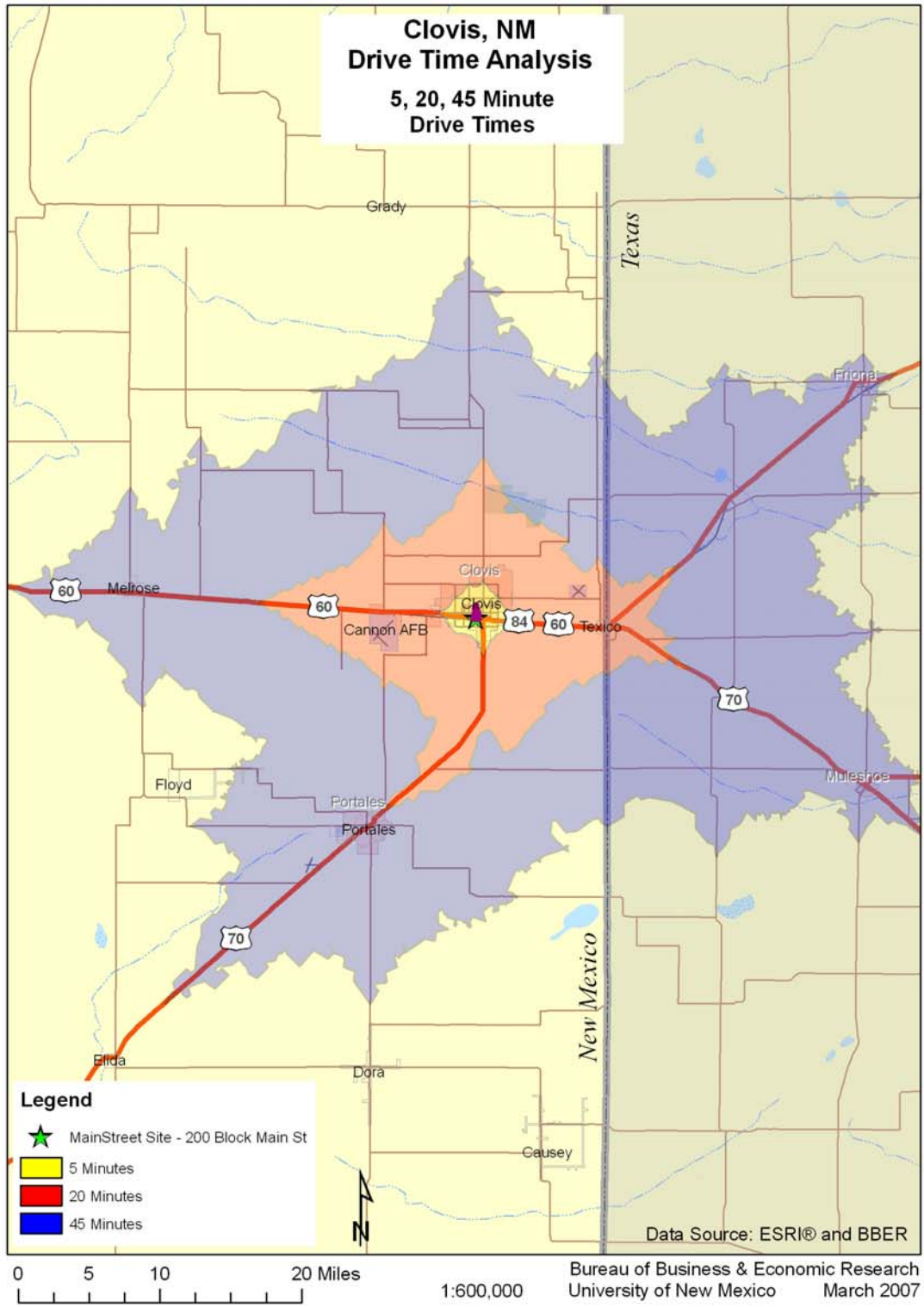
CLOVIS MAINSTREET – Community Economic Assessment

TABLE 2: SELECTED DEMOGRAPHIC, ECONOMIC, AND HOUSING CHARACTERISTICS – ROOSEVELT COUNTY, CONTINUED

|  | ROOSEVELT<br>COUNTY | EASTERN<br>PLAINS | NEW<br>MEXICO |
|--|---------------------|-------------------|---------------|
|  | 2000                | 2000              | 2000          |
| <b>HOUSEHOLD INCOME &amp; POVERTY</b>                  |                     |                   |               |
| Real per capita income (1999 dollars)                  | 14,185              | 14,591            | 17,261        |
| Median household income (1999 dollars)                 | 26,586              | na                | 34,133        |
| Households with earnings                               | 77%                 | 77%               | 80%           |
| Households with social security income                 | 27%                 | 29%               | 25%           |
| Households: with interest; dividends; or rental income | 26%                 | 25%               | 30%           |
| Households with public assistance income               | 4%                  | 5%                | 5%            |
| Households with retirement income                      | 15%                 | 16%               | 17%           |
| Persons below the poverty line                         | 3,928               | 16,179            | 328,933       |
| Poverty rate   | 22.7%               | 20.2%             | 18.4%         |
| <b>LABOR CHARACTERISTICS</b>                           |                     |                   |               |
| In labor force (population 16 yrs and over)            | 8,255               | 35,915            | 834,632       |
| Unemployment rate                                      | 7.8%                | 6.4%              | 7.2%          |
| <b>HOUSING CHARACTERISTICS</b>                         |                     |                   |               |
| Total housing units (#)                                | 7,746               | 36,089            | 780,579       |
| Home ownership (%)                                     |                     | 60%               | 68%           |
| Owner-occupied housing units                           | 4,165               | 19,028            | 474,435       |
| Vacancy rate (for sale)                                | 3.7%                | 4.5%              | 2.5%          |
| Renter-occupied housing units                          | 2,474               | 11,155            | 203,536       |
| Vacancy Rate (for rent)                                | 11.5%               | 11.5%             | 11.6%         |
| Median age of housing structures                       | 34                  | na                | 23            |
| <b>HOUSING AFFORDABILITY</b>                           |                     |                   |               |
| Median value of owner-occupied housing (1999 dollars)  | 56,700              | na                | 94,600        |
| Median costs of homeownership (% of income)            | 20.0%               | na                | 22.2%         |
| Median rent (1999 dollars)                             | 391                 | na                | 503           |
| Median cost of rental housing (% household income)     | 26.2%               | na                | 26.6%         |

Source: US Census Bureau, 1990 and 2000 Decennial Census; calculations by BBER, 2007.

FIGURE 1: REGIONAL TRADE AREA



**TABLE 3: REGIONAL TRADE AREA**

|                                   |
|-----------------------------------|
| <b>Clovis Regional Trade Area</b> |
|-----------------------------------|

**Center Point: 200 Block Main Street**

**Drive Time (Minutes)**

|   | <b>0 - 5</b> | <b>0 - 20</b> | <b>0 - 45</b> |
|---|--------------|---------------|---------------|
| <b>Population by Age (2006):</b>                                |              |               |               |
| <b>Total</b>  | 24,129       | 46,032        | 76,190        |
| 0-4   | 2,198        | 4,168         | 6,700         |
| 5-9   | 1,811        | 3,345         | 5,562         |
| 10-14   | 1,847        | 3,389         | 5,667         |
| 15-19   | 1,873        | 3,601         | 6,302         |
| 20-29   | 3,713        | 7,900         | 12,938        |
| 30-39   | 2,944        | 5,746         | 9,257         |
| 40-49   | 3,224        | 6,318         | 10,159        |
| 50-64   | 3,442        | 6,279         | 10,627        |
| 65-85   | 2,564        | 4,474         | 7,589         |
| 85+   | 513          | 812           | 1,389         |
| Median Age  | 32.1         | 31.1          | 31.0          |
| <b>Projected Population Growth by Age Cohort, 2006-2011 (%)</b> |              |               |               |
| <b>Total</b>  | 0.6%         | 1.0%          | 0.2%          |
| 0-4   | 2%           | 2%            | 0%            |
| 5-9   | 2%           | 3%            | 3%            |
| 10-14   | -4%          | -4%           | -2%           |
| 15-19   | -3%          | -5%           | -3%           |
| 20-29   | -3%          | 2%            | -3%           |
| 30-39   | 0%           | -3%           | 0%            |
| 40-49   | -4%          | -8%           | -8%           |
| 50-64   | 15%          | 18%           | 16%           |
| 65-85   | -4%          | -3%           | -3%           |
| 85+   | 5%           | 8%            | 9%            |
| Median Age (2011 Projection)                                    | 32.8         | 31.4          | 31.7          |
| <b>Households</b>   |              |               |               |
| Households  | 9,520        | 17,421        | 28,165        |
| Family Households   | 6,266        | 12,058        | 19,621        |
| Average Household Size  | 2.49         | 2.57          | 2.62          |
| <b>Race</b>   |              |               |               |
| White   | 16,104       | 32,494        | 53,409        |
| Black   | 1,882        | 3,272         | 3,728         |
| American Indian, Eskimo, Aleut                                  | 267          | 460           | 758           |
| Asian or Pacific Islander                                       | 306          | 1,039         | 1,202         |
| Other   | 4,614        | 6,976         | 14,487        |
| Two or More Races   | 954          | 1,792         | 2,607         |
| Hispanic Origin   | 10,356       | 15,428        | 28,107        |
| <b>Gender</b>   |              |               |               |
| Male  | 11,678       | 22,795        | 37,603        |
| Female  | 12,449       | 23,238        | 38,587        |

CLOVIS MAINSTREET – Community Economic Assessment

**TABLE 3: REGIONAL TRADE AREA, CONTINUED**

**Center Point: 200 Block Main Street**

**Drive Time (Minutes)**

|  | <b>0 - 5</b> | <b>0 - 20</b> | <b>0 - 45</b> |
|--|--------------|---------------|---------------|
| <b>Income</b>                              |              |               |               |
| Median Household Income                    | \$29,093     | \$34,319      | \$33,621      |
| Median Family Income                       | \$34,293     | \$40,100      | \$39,619      |
| Median Disposable Income                   | \$26,031     | \$29,722      | \$29,050      |
| Average Household Income                   | \$40,330     | \$46,673      | \$45,538      |
| Average Family Income                      | \$45,989     | \$52,849      | \$52,138      |
| Per Capita Income                          | \$15,931     | \$18,053      | \$17,299      |
| <b>Households by Disposable Income (1)</b> |              |               |               |
| < \$15,000                                 | 27.6%        | 21.5%         | 23.0%         |
| \$15,000-\$24,999                          | 19.8%        | 18.6%         | 18.5%         |
| \$25,000-\$34,999                          | 18.0%        | 17.8%         | 17.3%         |
| \$35,000-\$49,999                          | 16.7%        | 18.5%         | 18.3%         |
| \$50,000-\$74,999                          | 12.5%        | 15.8%         | 15.3%         |
| \$75,000-\$99,999                          | 2.5%         | 3.7%          | 3.6%          |
| \$100,000-\$149,999                        | 1.7%         | 2.7%          | 2.6%          |
| \$150,000-\$199,999                        | 0.5%         | 0.6%          | 0.6%          |
| \$200,000+                                 | 0.7%         | 0.7%          | 0.8%          |
| <b>Households by Net Worth</b>             |              |               |               |
| < \$15,000                                 | 41.8%        | 36.8%         | 37.8%         |
| \$15,000-\$34,999                          | 9.4%         | 9.5%          | 9.4%          |
| \$35,000-\$49,999                          | 5.3%         | 5.7%          | 5.5%          |
| \$50,000-\$74,999                          | 6.6%         | 7.2%          | 6.9%          |
| \$75,000-\$99,999                          | 6.4%         | 6.3%          | 6.0%          |
| \$100,000-\$149,999                        | 6.7%         | 7.6%          | 7.5%          |
| \$150,000-\$249,999                        | 7.1%         | 8.2%          | 8.1%          |
| \$250,000-499,999                          | 8.3%         | 9.2%          | 9.3%          |
| 500,000 +                                  | 8.3%         | 9.5%          | 9.5%          |
| Median Net Worth                           | \$31,147     | \$44,022      | \$41,794      |

(1) Disposable Income is total income after direct taxes.

**TABLE 3: REGIONAL TRADE AREA, CONTINUED**

**CONSUMER EXPENDITURES (2006)**

|  |             |             |             |
|--|-------------|-------------|-------------|
| <b>Retail Goods Total</b>                    | 138,063,675 | 293,378,094 | 473,935,495 |
| <b>Apparel</b>                               | 11,821,538  | 19,750,783  | 38,637,241  |
| Men`s Apparel                                | 2,241,125   | 4,693,126   | 7,294,321   |
| Women`s Apparel                              | 3,575,825   | 3,558,024   | 11,434,724  |
| Children`s Apparel                           | 2,135,047   | 4,583,677   | 7,261,118   |
| Infant Apparel (Under 2 Years)               | 631,390     | 1,358,412   | 2,162,346   |
| Footwear                                     | 1,121,819   | 1,116,018   | 3,714,512   |
| Watches & Jewelry                            | 1,003,816   | 2,141,234   | 3,239,418   |
| Apparel Products & Services                  | 1,112,515   | 2,300,291   | 3,530,802   |
| <b>Computer</b>                              |             |             |             |
| Computers & Hardware for Home Use            | 1,229,563   | 2,640,913   | 4,093,933   |
| Software & Accessories for Home Use          | 174,595     | 375,052     | 579,594     |
| <b>Entertainment/Recreation</b>              | 17,817,047  | 38,058,881  | 60,143,164  |
| <b>Fees &amp; Admissions</b>                 | 3,261,027   | 6,919,654   | 10,371,151  |
| Membership Fees                              | 884,739     | 1,865,486   | 2,799,141   |
| Fees for Participant Sports excluding Trips  | 613,684     | 1,299,591   | 1,968,211   |
| Admission to Movies/Theater/Opera/Ballet     | 806,984     | 1,700,418   | 2,567,389   |
| Admission to Sporting Events excluding Trips | 303,864     | 658,610     | 988,887     |
| Fees for Recreational Lessons                | 651,755     | 1,395,549   | 2,047,524   |
| <b>TV/Video/Sound Equipment</b>              | 5,314,721   | 18,777,585  | 18,327,285  |
| Community Antenna or Cable TV                | 3,484,001   | 12,950,267  | 11,352,963  |
| Color TVs                                    | 702,936     | 1,488,818   | 2,314,190   |
| VCRs/Video Cameras & DVD Players             | 219,896     | 469,789     | 736,680     |
| Video Cassettes & DVDs                       | 287,945     | 627,037     | 992,421     |
| Video Game Hardware & Software               | 198,553     | 427,842     | 664,773     |
| Satellite Dishes                             | 10,894      | 25,125      | 41,915      |
| Rental of Video Cassettes & DVDs             | 356,813     | 768,974     | 1,201,363   |
| Sound Equipment                              | 17,979      | 1,948,009   | 911,855     |
| Rental/Repair of TV/VCR/Sound Equipment      | 35,704      | 71,725      | 111,124     |
| Pets   | 2,399,808   | 5,221,009   | 8,520,052   |
| Toys & Games                                 | 1,089,766   | 2,328,572   | 3,658,200   |
| Recreational Vehicles & Fees                 | 1,926,849   | 4,437,897   | 7,485,759   |
| Sports/Rec/Exercise Equipment                | 913,448     | 2,008,645   | 3,193,477   |
| Photo Equipment/Supplies                     | 787,895     | 1,673,105   | 2,588,581   |
| Film Processing                              | 234,036     | 495,985     | 774,776     |
| Reading                                      | 1,224,653   | 2,519,733   | 3,885,839   |
| <b>Food at Home</b>                          | 27,800,321  | 57,947,118  | 93,566,600  |
| Bakery & Cereal Products                     | 4,066,795   | 8,468,535   | 13,625,589  |
| Meat/Poultry/Fish/Eggs                       | 7,367,943   | 15,283,068  | 24,870,374  |
| Dairy Products                               | 3,005,190   | 15,283,068  | 10,135,750  |
| Fruit & Vegetables                           | 4,806,005   | 9,980,342   | 16,001,317  |
| Snacks/Other Food                            | 8,554,389   | 17,931,914  | 28,933,570  |
| Nonalcoholic Beverages                       | 2,371,109   | 4,972,136   | 8,083,129   |
| <b>Food Away from Home</b>                   | 18,712,457  | 39,361,500  | 62,065,188  |
| <b>Alcoholic Beverages</b>                   | 2,933,266   | 2,917,226   | 9,954,472   |
| <b>Financial</b>                             |             |             |             |
| Investments                                  | 21,924,941  | 46,335,869  | 66,557,730  |
| Vehicle Loans                                | 32,544,638  | 71,470,291  | 117,633,148 |



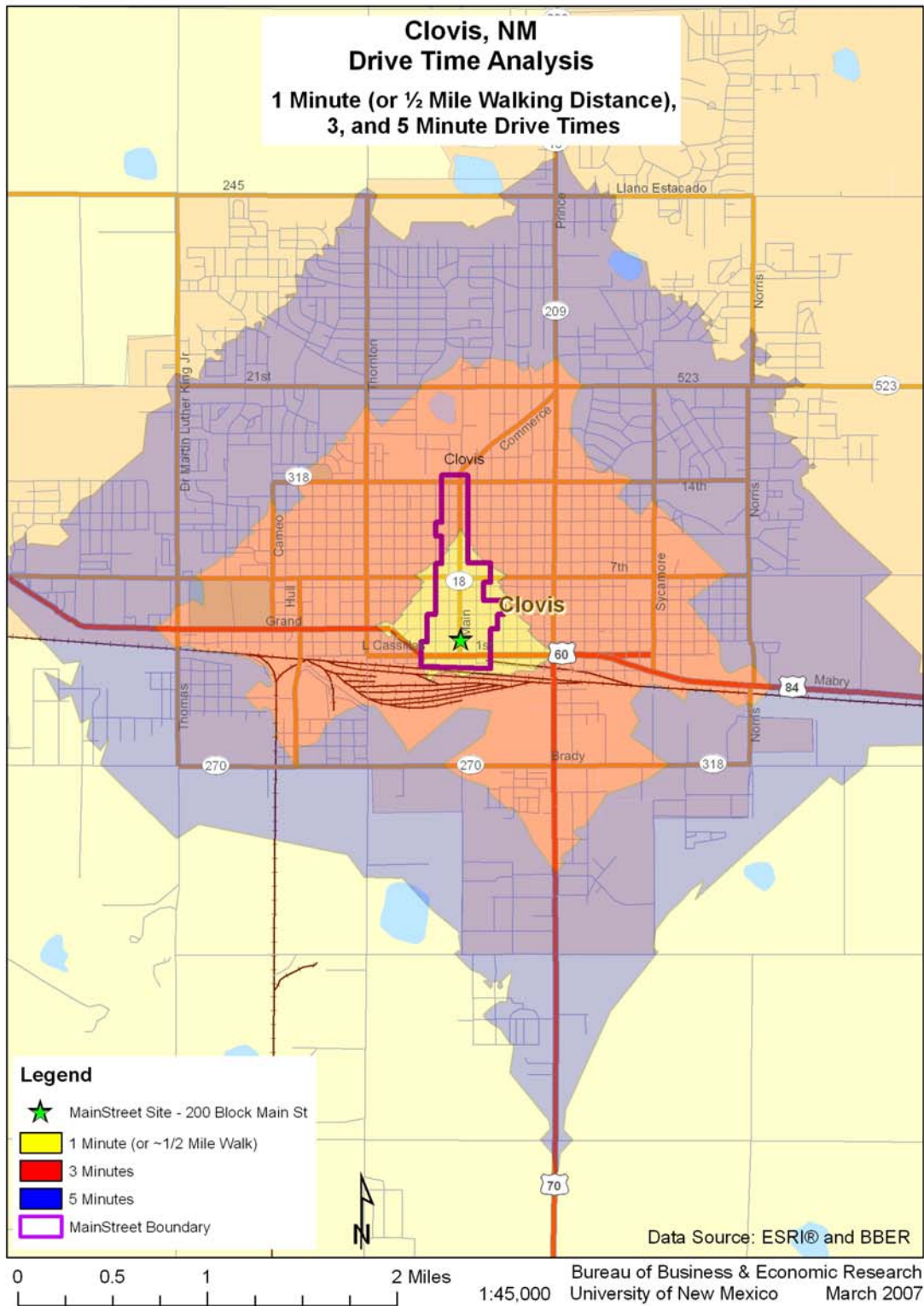
**TABLE 3: REGIONAL TRADE AREA, CONTINUED**

**CONSUMER EXPENDITURES (2006) continued**

|   |            |             |             |
|---|------------|-------------|-------------|
| <b>Health</b>                                 | 21,173,706 | 43,324,059  | 70,804,009  |
| Nonprescription Drugs                         | 664,130    | 1,361,371   | 2,209,979   |
| Prescription Drugs                            | 3,396,154  | 6,780,967   | 11,371,612  |
| Eyeglasses & Contact Lenses                   | 481,115    | 999,052     | 1,585,169   |
| <b>Housing</b>                                | 76,181,848 | 161,665,596 | 250,094,161 |
| Mortgage Payment & Basics                     | 42,210,310 | 91,307,083  | 140,214,135 |
| Maintenance & Remodeling Services             | 9,192,764  | 19,408,245  | 29,779,450  |
| Maintenance & Remodeling Materials            | 1,872,027  | 4,105,377   | 6,582,731   |
| Utilities/Fuel/Public Services                | 24,277,607 | 50,275,904  | 80,839,210  |
| Telephone Services                            | 8,368,549  | 17,462,708  | 27,998,741  |
| <b>Household Furnishings &amp; Equipment</b>  | 10,347,065 | 22,201,267  | 34,857,478  |
| Household Textiles                            | 721,927    | 1,529,180   | 2,372,979   |
| Furniture                                     | 3,348,457  | 7,156,055   | 11,172,576  |
| Floor Coverings                               | 425,241    | 903,790     | 1,342,196   |
| Major Appliances                              | 1,527,639  | 3,270,101   | 5,256,506   |
| Housewares                                    | 444,151    | 954,740     | 1,513,775   |
| Small Appliances                              | 208,026    | 434,889     | 691,754     |
| Luggage                                       | 55,406     | 115,870     | 172,883     |
| Telephones & Accessories                      | 129,476    | 274,527     | 427,104     |
| <b>Household Services &amp; Supplies</b>      |            |             |             |
| Computer Information Services                 | 927,164    | 1,969,439   | 3,076,924   |
| Child Care                                    | 2,230,154  | 4,906,913   | 7,307,683   |
| Lawn & Garden                                 | 2,278,715  | 4,840,940   | 7,955,444   |
| Moving/Storage/Freight Express                | 279,986    | 617,247     | 951,120     |
| Housekeeping Services                         | 681,269    | 1,414,466   | 2,138,048   |
| Housekeeping Supplies                         | 4,253,362  | 14,218,462  | 14,218,462  |
| <b>Miscellaneous</b>                          |            |             |             |
| Personal Care Products                        | 2,557,933  | 2,544,358   | 8,565,573   |
| School Books & Supplies                       | 728,191    | 1,548,031   | 2,447,681   |
| Smoking Products                              | 2,933,266  | 2,917,226   | 9,954,472   |
| <b>Insurance</b>                              |            |             |             |
| Owners & Renters                              | 2,462,015  | 5,148,192   | 8,298,977   |
| Vehicle                                       | 7,618,720  | 7,581,163   | 25,829,139  |
| Health  | 10,394,919 | 21,224,555  | 34,746,339  |
| Life & Other Personal                         | 391,835    | 7,458,335   | 21,831,864  |
| <b>Transportation (Local)</b>                 |            |             |             |
| Transportation-Vehicle Purchases (Net Outlay) | 32,047,234 | 69,664,504  | 114,311,972 |
| Transportation - Gasoline & Motor Oil         | 10,246,247 | 21,993,865  | 36,162,962  |
| Vehicle Maintenance & Repairs                 | 5,828,172  | 12,486,687  | 19,967,132  |
| <b>Travel</b>                                 | 9,756,560  | 20,520,062  | 31,712,374  |
| Airline Fares                                 | 2,124,400  | 4,460,347   | 6,750,797   |
| Travel - Lodging on Trips                     | 2,140,707  | 4,486,152   | 6,903,849   |
| Auto/Truck/Van Rental on Trips                | 237,154    | 502,079     | 752,865     |
| Travel - Food & Drink on Trips                | 2,511,124  | 5,300,581   | 8,257,471   |

Source: ESRI, 2006 Estimates & Projections.

FIGURE 2: LOCAL TRADE AREA



**TABLE 4: LOCAL TRADE AREA**

|                                |
|--------------------------------|
| <b>Clovis Local Trade Area</b> |
|--------------------------------|

**Center Point: 200 Block Main Street**

**Drive Time (Minutes)**

|   | <b>0 - 1</b> | <b>0 - 3</b> | <b>0 - 5</b> |
|---|--------------|--------------|--------------|
| <b>Population by Age (2006):</b>                                |              |              |              |
| <b>Total</b>  | 856          | 9,817        | 24,129       |
| 0-4   | 75           | 1,005        | 2,198        |
| 5-9   | 58           | 775          | 1,811        |
| 10-14   | 63           | 756          | 1,847        |
| 15-19   | 89           | 783          | 1,873        |
| 20-29   | 179          | 1,733        | 3,713        |
| 30-39   | 124          | 1,248        | 2,944        |
| 40-49   | 112          | 1,294        | 3,224        |
| 50-64   | 98           | 1,253        | 3,442        |
| 65-85   | 49           | 783          | 2,564        |
| 85+   | 9            | 187          | 513          |
| Median Age  | 27.7         | 29.1         | 32.1         |
| <b>Projected Population Growth by Age Cohort, 2006-2011 (%)</b> |              |              |              |
| <b>Total</b>  | -0.2%        | 0.2%         | 0.6%         |
| 0-4   | 7%           | 1%           | 2%           |
| 5-9   | 7%           | 3%           | 2%           |
| 10-14   | -17%         | -2%          | -4%          |
| 15-19   | -12%         | -1%          | -3%          |
| 20-29   | 6%           | -9%          | -3%          |
| 30-39   | 1%           | 4%           | 0%           |
| 40-49   | -4%          | -4%          | -4%          |
| 50-64   | 6%           | 15%          | 15%          |
| 65-85   | 0%           | -3%          | -4%          |
| 85+   | -11%         | 2%           | 5%           |
| Median Age (2011 Projection)                                    | 27.9         | 30.1         | 32.8         |
| <b>Households</b>   |              |              |              |
| Households  | 262          | 3,834        | 9,520        |
| Family Households   | 150          | 2,311        | 6,266        |
| Average Houshold Size   | 2.70         | 2.48         | 2.49         |
| <b>Race</b>   |              |              |              |
| White   | 533          | 6,039        | 16,104       |
| Black   | 97           | 832          | 1,882        |
| American Indian, Eskimo, Aleut                                  | 19           | 128          | 267          |
| Asian or Pacific Islander                                       | 4            | 98           | 306          |
| Other   | 165          | 2,301        | 4,614        |
| Two or More Races   | 37           | 418          | 954          |
| Hispanic Origin   | 467          | 5,236        | 10,356       |
| <b>Gender</b>   |              |              |              |
| Male  | 467          | 4,879        | 11,678       |
| Female  | 389          | 4,936        | 12,449       |

CLOVIS MAINSTREET – Community Economic Assessment

**TABLE 4: LOCAL TRADE AREA, CONTINUED**

**Center Point: 200 Block Main Street**

**Drive Time (Minutes)**

|  | <b>0 - 1</b> | <b>0 - 3</b> | <b>0 - 5</b> |
|--|--------------|--------------|--------------|
| <b>Income</b>                              |              |              |              |
| Median Household Income                    | \$21,446     | \$24,189     | \$29,093     |
| Median Family Income                       | \$28,949     | \$28,595     | \$34,293     |
| Median Disposable Income                   | \$19,257     | \$20,566     | \$26,031     |
| Average Household Income                   | \$26,838     | \$31,605     | \$40,330     |
| Average Family Income                      | \$33,062     | \$36,783     | \$45,989     |
| Per Capita Income                          | \$11,113     | \$12,792     | \$15,931     |
| <b>Households by Disposable Income (1)</b> |              |              |              |
| < \$15,000                                 | 34.8%        | 34.6%        | 27.6%        |
| \$15,000-\$24,999                          | 27.1%        | 23.1%        | 19.8%        |
| \$25,000-\$34,999                          | 17.7%        | 18.9%        | 18.0%        |
| \$35,000-\$49,999                          | 12.7%        | 13.4%        | 16.7%        |
| \$50,000-\$74,999                          | 6.9%         | 7.6%         | 12.5%        |
| \$75,000-\$99,999                          | 0.5%         | 1.0%         | 2.5%         |
| \$100,000-\$149,999                        | 0.3%         | 0.7%         | 1.7%         |
| \$150,000-\$199,999                        | 0.0%         | 0.3%         | 0.5%         |
| \$200,000+                                 | 0.0%         | 0.5%         | 0.7%         |
| <b>Households by Net Worth</b>             |              |              |              |
| < \$15,000                                 | 50.1%        | 49.5%        | 41.8%        |
| \$15,000-\$34,999                          | 9.7%         | 9.6%         | 9.4%         |
| \$35,000-\$49,999                          | 5.7%         | 5.5%         | 5.3%         |
| \$50,000-\$74,999                          | 6.1%         | 6.4%         | 6.6%         |
| \$75,000-\$99,999                          | 6.4%         | 6.7%         | 6.4%         |
| \$100,000-\$149,999                        | 4.6%         | 5.4%         | 6.7%         |
| \$150,000-\$249,999                        | 5.1%         | 5.4%         | 7.1%         |
| \$250,000-499,999                          | 5.7%         | 5.6%         | 8.3%         |
| 500,000 +                                  | 6.6%         | 5.9%         | 8.3%         |
| Median Net Worth                           | \$15,000     | \$15,603     | \$31,147     |

(1) Disposable Income is total income after direct taxes.

**TABLE 4: LOCAL TRADE AREA, CONTINUED**

**CONSUMER EXPENDITURES (2006)**

|  |           |            |             |
|--|-----------|------------|-------------|
| <b>Retail Goods Total</b>                    | 2,469,277 | 44,097,364 | 138,063,675 |
| <b>Apparel</b>                               | 236,573   | 2,420,769  | 11,821,538  |
| Men`s Apparel                                | 43,518    | 720,967    | 2,241,125   |
| Women`s Apparel                              | 69,587    | 69,587     | 3,575,825   |
| Children`s Apparel                           | 42,953    | 708,415    | 2,135,047   |
| Infant Apparel (Under 2 Years)               | 13,371    | 215,121    | 631,390     |
| Footwear                                     | 22,833    | 22,833     | 1,121,819   |
| Watches & Jewelry                            | 18,590    | 310,215    | 1,003,816   |
| Apparel Products & Services                  | 25,720    | 373,631    | 1,112,515   |
| <b>Computer</b>                              |           |            |             |
| Computers & Hardware for Home Use            | 23,365    | 390,394    | 1,229,563   |
| Software & Accessories for Home Use          | 3,246     | 56,362     | 174,595     |
| <b>Entertainment/Recreation</b>              | 320,039   | 5,545,751  | 17,817,047  |
| <b>Fees &amp; Admissions</b>                 | 60,341    | 984,933    | 3,261,027   |
| Membership Fees                              | 15,164    | 261,058    | 884,739     |
| Fees for Participant Sports excluding Trips  | 10,380    | 183,816    | 613,684     |
| Admission to Movies/Theater/Opera/Ballet     | 16,586    | 255,596    | 806,984     |
| Admission to Sporting Events excluding Trips | 5,670     | 92,861     | 303,864     |
| Fees for Recreational Lessons                | 12,540    | 191,602    | 651,755     |
| <b>TV/Video/Sound Equipment</b>              | 118,462   | 2,930,652  | 5,314,721   |
| Community Antenna or Cable TV                | 65,281    | 2,033,491  | 3,484,001   |
| Color TVs                                    | 13,188    | 226,812    | 702,936     |
| VCRs/Video Cameras & DVD Players             | 4,233     | 70,639     | 219,896     |
| Video Cassettes & DVDs                       | 5,706     | 95,324     | 287,945     |
| Video Game Hardware & Software               | 4,110     | 65,299     | 198,553     |
| Satellite Dishes                             | 167       | 3,382      | 10,894      |
| Rental of Video Cassettes & DVDs             | 7,061     | 120,951    | 356,813     |
| Sound Equipment                              | 17,979    | 302,772    | 17,979      |
| Rental/Repair of TV/VCR/Sound Equipment      | 738       | 11,982     | 35,704      |
| Pets   | 40,874    | 731,506    | 2,399,808   |
| Toys & Games                                 | 20,559    | 348,239    | 1,089,766   |
| Recreational Vehicles & Fees                 | 27,153    | 542,741    | 1,926,849   |
| Sports/Rec/Exercise Equipment                | 15,752    | 281,922    | 913,448     |
| Photo Equipment/Supplies                     | 14,534    | 247,777    | 787,895     |
| Film Processing                              | 4,346     | 73,767     | 234,036     |
| Reading                                      | 22,364    | 375,142    | 1,224,653   |
| <b>Food at Home</b>                          | 538,599   | 9,126,237  | 27,800,321  |
| Bakery & Cereal Products                     | 80,086    | 1,329,756  | 4,066,795   |
| Meat/Poultry/Fish/Eggs                       | 142,537   | 2,440,526  | 7,367,943   |
| Dairy Products                               | 57,967    | 2,440,526  | 3,005,190   |
| Fruit & Vegetables                           | 95,035    | 1,569,937  | 4,806,005   |
| Snacks/Other Food                            | 162,974   | 2,805,961  | 8,554,389   |
| Nonalcoholic Beverages                       | 46,103    | 781,307    | 2,371,109   |
| <b>Food Away from Home</b>                   | 364,301   | 6,088,208  | 18,712,457  |
| <b>Alcoholic Beverages</b>                   | 58,846    | 58,846     | 2,933,266   |

**TABLE 4: LOCAL TRADE AREA, CONTINUED**  
**CONSUMER EXPENDITURES (2006) continued**

|   |           |            |            |
|---|-----------|------------|------------|
| <b>Financial</b>                              |           |            |            |
| Investments                                   | 391,835   | 6,089,631  | 21,924,941 |
| Vehicle Loans                                 | 535,778   | 10,488,816 | 32,544,638 |
| <b>Health</b>                                 |           |            |            |
| Nonprescription Drugs                         | 338,614   | 6,655,807  | 21,173,706 |
| Prescription Drugs                            | 11,701    | 215,323    | 664,130    |
| Eyeglasses & Contact Lenses                   | 50,592    | 1,081,261  | 3,396,154  |
|   | 8,359     | 149,209    | 481,115    |
| <b>Housing</b>                                |           |            |            |
| Mortgage Payment & Basics                     | 1,502,361 | 23,943,215 | 76,181,848 |
| Maintenance & Remodeling Services             | 645,546   | 12,168,195 | 42,210,310 |
| Maintenance & Remodeling Materials            | 137,863   | 2,574,101  | 9,192,764  |
| Utilities/Fuel/Public Services                | 28,424    | 539,075    | 1,872,027  |
| Telephone Services                            | 435,850   | 7,866,527  | 24,277,607 |
|   | 161,060   | 2,769,498  | 8,368,549  |
| <b>Household Furnishings &amp; Equipment</b>  |           |            |            |
| Household Textiles                            | 183,510   | 3,217,219  | 10,347,065 |
| Furniture                                     | 13,054    | 224,286    | 721,927    |
| Floor Coverings                               | 60,384    | 1,052,318  | 3,348,457  |
| Major Appliances                              | 7,218     | 120,208    | 425,241    |
| Housewares                                    | 25,341    | 470,841    | 1,527,639  |
| Small Appliances                              | 8,126     | 137,862    | 444,151    |
| Luggage                                       | 3,799     | 65,540     | 208,026    |
| Telephones & Accessories                      | 1,042     | 16,962     | 55,406     |
|   | 2,614     | 42,701     | 129,476    |
| <b>Household Services &amp; Supplies</b>      |           |            |            |
| Computer Information Services                 | 17,206    | 292,133    | 927,164    |
| Child Care                                    | 45,033    | 712,742    | 2,230,154  |
| Lawn & Garden                                 | 34,147    | 668,621    | 2,278,715  |
| Moving/Storage/Freight Express                | 5,656     | 91,750     | 279,986    |
| Housekeeping Services                         | 10,404    | 196,375    | 681,269    |
| Housekeeping Supplies                         | 77,147    | 4,253,362  | 4,253,362  |
| <b>Miscellaneous</b>                          |           |            |            |
| Personal Care Products                        | 49,149    | 49,149     | 2,557,933  |
| School Books & Supplies                       | 15,086    | 258,306    | 728,191    |
| Smoking Products                              | 58,846    | 58,846     | 2,933,266  |
| <b>Insurance</b>                              |           |            |            |
| Owners & Renters                              | 34,959    | 742,254    | 2,462,015  |
| Vehicle                                       | 137,157   | 137,157    | 7,618,720  |
| Health  | 167,430   | 3,260,953  | 10,394,919 |
| Life & Other Personal                         | 55,677    | 1,081,556  | 391,835    |
| <b>Transportation (Local)</b>                 |           |            |            |
| Transportation-Vehicle Purchases (Net Outlay) | 540,693   | 10,256,071 | 32,047,234 |
| Transportation - Gasoline & Motor Oil         | 181,491   | 3,331,302  | 10,246,247 |
| Vehicle Maintenance & Repairs                 | 105,345   | 1,854,931  | 5,828,172  |
| <b>Travel</b>                                 |           |            |            |
| Airline Fares                                 | 172,351   | 2,973,058  | 9,756,560  |
| Travel - Lodging on Trips                     | 40,449    | 649,541    | 2,124,400  |
| Auto/Truck/Van Rental on Trips                | 36,140    | 634,143    | 2,140,707  |
| Travel - Food & Drink on Trips                | 4,355     | 70,436     | 237,154    |
|   | 43,771    | 768,424    | 2,511,124  |

Source: ESRI, 2006 Estimates & Projections.

CLOVIS MAINSTREET – Community Economic Assessment

TABLE 5: CLOVIS TAXABLE GROSS RECEIPTS AND PULL FACTORS, 1989 & 2002

| CLOVIS INDUSTRIES                                | TAXABLE GROSS RECEIPTS (2002 \$) |                    | PULL FACTOR |             | NET GAIN/LOSS (2002 \$) |                     | CHANGE (1989-2002) |                      |
|--|----------------------------------|--------------------|-------------|-------------|-------------------------|---------------------|--------------------|----------------------|
|  | 1989                             | 2002               | 1989        | 2002        | 1989                    | 2002                | TGR Real           | Real Gain/Loss       |
| <b>Agriculture</b>                               | 2,087,288                        | 1,174,877          | 132%        | 116%        | 501,425                 | 165,462             | -44%               | (335,962)            |
| <b>Contract Construction</b>                     | 35,213,125                       | 34,401,714         | 73%         | 52%         | (12,949,150)            | (32,116,475)        | -2%                | (19,167,325)         |
| <b>Manufacturing</b>                             | 6,515,277                        | 1,925,414          | 51%         | 17%         | (6,249,192)             | (9,654,097)         | -70%               | (3,404,906)          |
| <b>Transportation, Communications, Utilities</b> | 47,262,169                       | 39,454,316         | 108%        | 110%        | 3,585,801               | 3,668,157           | -17%               | 82,355               |
| <b>Wholesale Trade</b>                           | 13,858,213                       | 13,298,842         | 54%         | 51%         | (11,724,678)            | (12,666,125)        | -4%                | (941,448)            |
| Building Materials                               | 4,899,626                        | 9,846,433          | 98%         | 380%        | (83,269)                | 7,254,468           | 101%               | 7,337,737            |
| Retail Food Stores                               | 58,288,273                       | 38,568,406         | 188%        | 136%        | 27,232,983              | 10,245,258          | -34%               | (16,987,725)         |
| Motor Vehicle Dealers                            | 6,417,477                        | 7,339,064          | 210%        | 211%        | 3,365,283               | 3,861,163           | 14%                | 495,880              |
| Gasoline Service Stations                        | 4,028,434                        | 571,951            | 138%        | 19%         | 1,115,015               | (2,380,963)         | -86%               | (3,495,978)          |
| Misc Vehicle and Accessory Dealers               | 7,093,035                        | 4,141,652          | 135%        | 82%         | 1,825,534               | (902,919)           | -42%               | (2,728,454)          |
| Apparel and Accessory Stores                     | 13,701,754                       | 9,863,944          | 155%        | 135%        | 4,883,862               | 2,547,249           | -28%               | (2,336,613)          |
| Furniture and Home Furnishings                   | 9,482,555                        | 4,627,602          | 144%        | 93%         | 2,884,203               | (342,203)           | -51%               | (3,226,405)          |
| Eating and Drinking Establishments               | 32,005,091                       | 33,914,305         | 151%        | 142%        | 10,739,672              | 9,950,712           | 6%                 | (788,960)            |
| Liquor Dispensers                                | 5,894,999                        | 4,755,904          | 88%         | 165%        | (810,710)               | 1,869,196           | -19%               | 2,679,906            |
| Drug and Proprietary Stores                      | 13,410,615                       | 7,982,490          | 197%        | 230%        | 6,600,396               | 4,516,016           | -40%               | (2,084,380)          |
| Misc Retailers (ALL)*                            | 90,347,596                       | 164,305,189        | 93%         | 150%        | (6,552,040)             | 54,781,640          | 82%                | 61,333,680           |
| <b>Total Retail Trade</b>                        | <b>254,341,848</b>               | <b>287,752,614</b> | <b>148%</b> | <b>145%</b> | <b>82,939,036</b>       | <b>89,672,786</b>   | <b>13%</b>         | <b>6,733,750</b>     |
| <b>Finance, Insurance and Real Estate</b>        | <b>12,762,858</b>                | <b>10,811,894</b>  | <b>110%</b> | <b>95%</b>  | <b>1,110,841</b>        | <b>(619,021)</b>    | <b>-15%</b>        | <b>(1,729,863)</b>   |
| Hotels, Motels                                   | 6,466,844                        | 4,750,755          | 78%         | 57%         | (1,855,891)             | (3,520,866)         | -27%               | (1,664,975)          |
| Personal Services                                | 5,337,359                        | 6,343,765          | 94%         | 84%         | (334,146)               | (1,214,046)         | 19%                | (879,900)            |
| Misc Business Services                           | 7,256,275                        | 16,747,063         | 34%         | 68%         | (14,045,298)            | (7,812,739)         | 131%               | 6,232,559            |
| Auto Rental and Repair                           | 8,240,161                        | 12,029,008         | 110%        | 139%        | 755,040                 | 3,366,923           | 46%                | 2,611,882            |
| Misc Repair Services                             | 4,587,190                        | 1,383,032          | 159%        | 47%         | 1,709,709               | (1,534,696)         | -70%               | (3,244,405)          |
| Physicians and Dentists                          | 21,123,939                       | 15,780,418         | 141%        | 110%        | 6,162,859               | 1,452,539           | -25%               | (4,710,320)          |
| Hospitals and Other Health Services              | 7,425,679                        | 29,717,694         | 77%         | 259%        | (2,249,663)             | 18,250,060          | 300%               | 20,499,723           |
| Legal Services                                   | 4,102,386                        | 5,005,053          | 49%         | 63%         | (4,278,980)             | (2,987,391)         | 22%                | 1,291,589            |
| Misc Services                                    | 11,800,696                       | 33,966,309         | 59%         | 61%         | (8,166,763)             | (21,953,241)        | 188%               | (13,786,478)         |
| Engineering and Architectural Services           | 1,222,687                        |                    | 19%         |             | (5,134,269)             |                     |                    |                      |
| <b>Total Services</b>                            | <b>84,332,939</b>                | <b>129,086,447</b> | <b>64%</b>  | <b>76%</b>  | <b>(48,438,692)</b>     | <b>(40,020,178)</b> | <b>53%</b>         | <b>8,418,514</b>     |
| <b>Total Taxable Gross Receipts</b>              | <b>461,845,426</b>               | <b>518,636,926</b> | <b>132%</b> | <b>97%</b>  | <b>112,784,406</b>      | <b>(18,701,060)</b> | <b>12%</b>         | <b>(131,485,466)</b> |

\* Misc Retailers (ALL) includes Department Stores, General Merchandise, and Misc Retailers.

All values are adjusted for inflation and reported in terms of 2002 dollars.

Data is classified according to Standard Industrial Classification (SIC). 1989 and 2002 are the first and last years for which comparable data are available.

Major sectors do not sum to total taxable gross receipts because non-classified businesses are not included.

Source: NM Taxation & Revenue Department, RP80 tables; US Census Bureau. Calculations by BBER, 2007.

CLOVIS MAINSTREET – Community Economic Assessment

TABLE 6: CURRY COUNTY TAXABLE GROSS RECEIPTS AND PULL FACTORS, 1989 & 2002

| CURRY COUNTY<br>INDUSTRIES                       | TAXABLE GROSS RECEIPTS (2002 \$) |                    | PULL FACTOR |             | NET GAIN/LOSS (2002 \$) |                      | CHANGE (1989-2002) |                      |
|--|----------------------------------|--------------------|-------------|-------------|-------------------------|----------------------|--------------------|----------------------|
|  | 1989                             | 2002               | 1989        | 2002        | 1989                    | 2002                 | TGR Real           | Real Gain/Loss       |
| <b>Agriculture</b>                               | <b>2,902,750</b>                 | <b>1,514,858</b>   | <b>136%</b> | <b>112%</b> | <b>774,681</b>          | <b>163,473</b>       | <b>-48%</b>        | <b>(611,208)</b>     |
| <b>Contract Construction</b>                     | <b>44,725,921</b>                | <b>61,183,238</b>  | <b>69%</b>  | <b>69%</b>  | <b>(19,903,009)</b>     | <b>(27,870,027)</b>  | <b>37%</b>         | <b>(7,967,018)</b>   |
| <b>Manufacturing</b>                             | <b>6,651,375</b>                 | <b>1,733,642</b>   | <b>39%</b>  | <b>11%</b>  | <b>(10,477,259)</b>     | <b>(13,768,784)</b>  | <b>-74%</b>        | <b>(3,291,525)</b>   |
| <b>Transportation, Communications, Utilities</b> | <b>68,835,799</b>                | <b>67,645,154</b>  | <b>117%</b> | <b>141%</b> | <b>10,226,506</b>       | <b>19,735,336</b>    | <b>-2%</b>         | <b>9,508,830</b>     |
| <b>Wholesale Trade</b>                           | <b>16,459,617</b>                | <b>15,513,943</b>  | <b>48%</b>  | <b>45%</b>  | <b>(17,870,051)</b>     | <b>(19,247,453)</b>  | <b>-6%</b>         | <b>(1,377,403)</b>   |
| Building Materials                               | 5,109,436                        | 10,012,053         | 76%         | 289%        | (1,577,108)             | 6,541,980            | 96%                | 8,119,088            |
| Hardware Stores                                  | 2,087,335                        |                    | 108%        |             | 161,904                 |                      |                    |                      |
| Retail Food Stores                               | 60,687,540                       | 41,248,642         | 146%        | 109%        | 19,014,464              | 3,330,159            | -32%               | (15,684,305)         |
| Motor Vehicle Dealers                            | 6,417,477                        | 7,410,893          | 157%        | 159%        | 2,321,740               | 2,754,746            | 15%                | 433,006              |
| Gasoline Service Stations                        | 4,453,266                        | 595,034            | 114%        | 15%         | 543,751                 | (3,358,270)          | -87%               | (3,902,021)          |
| Misc Vehicle and Accessory Dealers               | 7,288,463                        | 4,816,286          | 103%        | 71%         | 220,007                 | (1,937,288)          | -34%               | (2,157,295)          |
| Apparel and Accessory Stores                     | 14,417,079                       | 9,900,410          | 122%        | 101%        | 2,584,355               | 104,960              | -31%               | (2,479,394)          |
| Furniture and Home Furnishings                   | 9,536,054                        | 4,636,510          | 108%        | 70%         | 681,728                 | (2,016,969)          | -51%               | (2,698,697)          |
| Eating and Drinking Establishments               | 32,811,066                       | 34,254,591         | 115%        | 107%        | 4,275,013               | 2,172,596            | 4%                 | (2,102,417)          |
| Liquor Dispensers                                | 5,894,999                        | 4,755,904          | 66%         | 123%        | (3,103,388)             | 891,235              | -19%               | 3,994,624            |
| Drug and Proprietary Stores                      | 13,410,615                       | 7,982,490          | 147%        | 172%        | 4,271,986               | 3,341,642            | -40%               | (930,344)            |
| Misc Retailers (ALL)*                            | 93,286,340                       | 167,310,344        | 72%         | 114%        | (36,743,227)            | 20,682,333           | 79%                | 57,425,561           |
| <b>Total Retail Trade</b>                        | <b>264,665,172</b>               | <b>300,735,271</b> | <b>115%</b> | <b>113%</b> | <b>34,659,835</b>       | <b>35,549,826</b>    | <b>14%</b>         | <b>889,991</b>       |
| <b>Finance, Insurance and Real Estate</b>        | <b>13,132,999</b>                | <b>11,215,979</b>  | <b>84%</b>  | <b>73%</b>  | <b>(2,502,835)</b>      | <b>(4,087,510)</b>   | <b>-15%</b>        | <b>(1,584,675)</b>   |
| Hotels, Motels                                   | 6,508,258                        | 4,767,961          | 58%         | 43%         | (4,660,014)             | (6,305,925)          | -27%               | (1,645,911)          |
| Personal Services                                | 5,813,100                        | 7,053,574          | 76%         | 70%         | (1,797,489)             | (3,064,677)          | 21%                | (1,267,188)          |
| Misc Business Services                           | 8,150,768                        | 29,095,117         | 29%         | 88%         | (20,433,800)            | (3,785,071)          | 257%               | 16,648,729           |
| Auto Rental and Repair                           | 10,325,300                       | 13,383,023         | 103%        | 115%        | 281,020                 | 1,786,391            | 30%                | 1,505,371            |
| Misc Repair Services                             | 6,489,330                        | 2,554,342          | 168%        | 65%         | 2,628,039               | (1,351,856)          | -61%               | (3,979,895)          |
| Amusement  | 5,694,124                        | 796,285            | 199%        | 40%         | 2,827,844               | (1,184,189)          | -86%               | (4,012,033)          |
| Physicians and Dentists                          | 21,151,267                       | 15,780,418         | 105%        | 82%         | 1,075,001               | (3,401,469)          | -25%               | (4,476,471)          |
| Hospitals and Other Health Services              | 7,551,330                        | 29,750,314         | 58%         | 194%        | (5,432,005)             | 14,397,667           | 294%               | 19,829,672           |
| Legal Services                                   | 4,127,338                        | 5,005,053          | 37%         | 47%         | (7,119,611)             | (5,695,076)          | 21%                | 1,424,535            |
| Educational Services                             | 119,274                          | 314,741            | 10%         | 15%         | (1,029,008)             | (1,831,326)          | 164%               | (802,318)            |
| Misc Services                                    | 15,080,908                       | 41,376,628         | 56%         | 55%         | (11,713,414)            | (33,487,384)         | 174%               | (21,773,971)         |
| Engineering and Architectural Services           | 1,227,349                        |                    | 14%         |             | (7,303,048)             |                      |                    |                      |
| <b>Total Services</b>                            | <b>93,315,951</b>                | <b>152,571,430</b> | <b>52%</b>  | <b>67%</b>  | <b>(84,850,226)</b>     | <b>(73,825,251)</b>  | <b>63%</b>         | <b>11,024,975</b>    |
| <b>Total Taxable Gross Receipts</b>              | <b>516,204,812</b>               | <b>612,821,123</b> | <b>110%</b> | <b>85%</b>  | <b>47,800,028</b>       | <b>(106,556,585)</b> | <b>19%</b>         | <b>(154,356,613)</b> |

\* Misc Retailers (ALL) includes Department Stores, General Merchandise, and Misc Retailers.

All values are adjusted for inflation and reported in terms of 2002 dollars.

Data is classified according to Standard Industrial Classification (SIC). 1989 and 2002 are the first and last years for which comparable data are available.

Major sectors do not sum to total taxable gross receipts because non-classified businesses are not included.

Source: NM Taxation & Revenue Department, RP80 tables; US Census Bureau. Calculations by BBER, 2007.



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TABLE 7: CLOVIS TAXABLE GROSS RECEIPTS AND PULL FACTORS, 2005

| CLOVIS  | TAXABLE GROSS RECEIPTS and<br>FOOD & MEDICAL DEDUCTIONS<br>(Thousands \$) |        |        |        |        | PULL FACTOR |      |      |      |      | NET GAIN/LOSS (Thousands \$) |          |         |         |          |
|---|---|--------|--------|--------|--------|-------------|------|------|------|------|------------------------------|----------|---------|---------|----------|
|   | 2005  | Q1     | Q2     | Q3     | Q4     | 2005        | Q1   | Q2   | Q3   | Q4   | 2005                         | Q1       | Q2      | Q3      | Q4       |
| AGRIC, FORESTRY, FISHING & HUNTING            | 1,498   | 182    | 812    | 405    | 99     | 114%        | 63%  | 218% | 122% | 31%  | 186                          | (108)    | 439     | 73      | (218)    |
| UTILITIES                                     | 34,951  | 8,969  | 7,369  | 9,122  | 9,491  | 117%        | 112% | 116% | 128% | 112% | 4,951                        | 977      | 1,003   | 1,977   | 995      |
| CONSTRUCTION                                  | 76,090  | 15,543 | 19,033 | 24,936 | 16,578 | 80%         | 77%  | 83%  | 100% | 62%  | (19,027)                     | (4,746)  | (4,015) | 95      | (10,362) |
| MANUFACTURING                                 | 2,915   | 794    | 810    | 540    | 770    | 17%         | 21%  | 19%  | 12%  | 17%  | (14,072)                     | (2,931)  | (3,436) | (3,826) | (3,879)  |
| WHOLESALE TRADE                               | 41,488  | 9,080  | 11,604 | 10,797 | 10,007 | 104%        | 106% | 116% | 102% | 94%  | 1,674                        | 551      | 1,606   | 205     | (687)    |
| RETAIL TRADE                                  | 269,264   | 62,829 | 66,241 | 63,516 | 76,677 | 129%        | 133% | 128% | 124% | 130% | 60,106                       | 15,619   | 14,388  | 12,259  | 17,840   |
| Automobile Dealers                            | 5,019   | 1,179  | 1,296  | 1,402  | 1,143  | 133%        | 135% | 131% | 139% | 126% | 1,241                        | 304      | 306     | 396     | 235      |
| Auto Parts, Accessories & Tire Stores         | 5,849   | 1,189  | 1,549  | 1,605  | 1,506  | 100%        | 86%  | 107% | 105% | 102% | 4                            | (198)    | 106     | 73      | 23       |
| Furniture & Home Furnishings Stores           | 4,489   | 1,361  | 987    | 1,021  | 1,121  | 80%         | 103% | 67%  | 77%  | 75%  | (1,132)                      | 36       | (486)   | (306)   | (375)    |
| Computer & Software Stores                    | 17  |        |        | 17     |        | 7%          |      |      | 26%  |      | (240)                        |          |         | (49)    |          |
| Building Material & Supply Dealers            | 10,145  | 2,280  | 2,766  | 2,738  | 2,362  | 341%        | 384% | 336% | 327% | 329% | 7,170                        | 1,686    | 1,942   | 1,899   | 1,643    |
| Grocery Stores                                | 41,262  | 9,214  | 10,983 | 9,703  | 11,362 | 140%        | 140% | 147% | 142% | 131% | 11,769                       | 2,636    | 3,532   | 2,881   | 2,721    |
| Pharmacies & Drug Stores                      | 7,909   | 2,004  | 1,915  | 1,676  | 2,313  | 179%        | 159% | 195% | 174% | 191% | 3,497                        | 745      | 935     | 712     | 1,105    |
| Other Health & Personal Care Stores           | 657   | 161    | 166    | 134    | 196    | 135%        | 173% | 168% | 79%  | 157% | 170                          | 68       | 67      | (36)    | 71       |
| Gasoline Stations                             | 1,242   | 217    | 196    | 537    | 292    | 59%         | 45%  | 36%  | 95%  | 55%  | (876)                        | (262)    | (348)   | (26)    | (240)    |
| Women's Clothing Stores                       | 166   | 166    |        |        |        | 73%         | 451% |      |      |      | (61)                         | 129      |         |         |          |
| Family Clothing Stores                        | 153   | 56     | 48     | 49     |        | 26%         | 58%  | 34%  | 29%  |      | (442)                        | (41)     | (91)    | (121)   |          |
| Clothing Accessory Stores                     | 11,300  | 2,489  | 2,556  | 2,754  | 3,502  | 160%        | 159% | 150% | 165% | 165% | 4,239                        | 922      | 854     | 1,083   | 1,380    |
| Other Clothing Stores                         | 392   | 184    |        |        | 208    | 154%        | 758% |      |      | 149% | 138                          | 159      |         |         | 69       |
| Gift, Novelty & Souvenir Stores               | 174   | 52     |        |        | 122    | 39%         | 57%  |      |      | 87%  | (271)                        | (40)     |         |         | (19)     |
| Electronic Shopping & Mail Order Houses       | 19  | 10     | 6      |        | 4      | 8%          | 26%  | 12%  |      | 4%   | (210)                        | (30)     | (42)    |         | (97)     |
| Miscellaneous Store Retailers (All)*          | 173,449   | 40,857 | 41,807 | 40,352 | 50,433 | 127%        | 132% | 124% | 120% | 131% | 36,926                       | 9,873    | 8,193   | 6,794   | 12,066   |
| TRANSPORTATION AND WAREHOUSING                | 3,481   | 1,019  | 677    | 805    | 980    | 56%         | 72%  | 43%  | 55%  | 54%  | (2,791)                      | (399)    | (901)   | (670)   | (820)    |
| INFORMATION AND CULTURAL INDUSTRIES           | 20,351  | 4,934  | 4,397  | 4,716  | 6,303  | 147%        | 143% | 134% | 138% | 171% | 6,500                        | 1,491    | 1,105   | 1,293   | 2,611    |
| FINANCE AND INSURANCE                         | 2,941   | 623    | 1,055  | 392    | 870    | 71%         | 59%  | 104% | 39%  | 80%  | (1,218)                      | (436)    | 44      | (612)   | (215)    |
| REAL ESTATE AND RENTAL AND LEASING            | 5,866   | 1,746  | 1,566  | 1,174  | 1,379  | 56%         | 83%  | 58%  | 42%  | 46%  | (4,677)                      | (349)    | (1,134) | (1,602) | (1,592)  |
| PROF, SCIENTIFIC & TECHNICAL SERVICES         | 33,694  | 6,380  | 7,768  | 11,404 | 8,142  | 51%         | 37%  | 47%  | 74%  | 50%  | (31,911)                     | (10,974) | (8,675) | (4,039) | (8,223)  |
| Legal Services                                | 5,122   | 1,151  | 1,165  | 1,532  | 1,274  | 61%         | 57%  | 55%  | 78%  | 54%  | (3,288)                      | (866)    | (936)   | (421)   | (1,065)  |
| Architectural, Engineering & Related Services | 865   | 221    | 354    | 238    | 52     | 12%         | 14%  | 19%  | 13%  | 3%   | (6,161)                      | (1,339)  | (1,502) | (1,616) | (1,704)  |
| Mgt OF COMPANIES & ENTERPRISES                | 1,609   | 379    | 501    | 411    | 318    | 191%        | 228% | 228% | 182% | 139% | 768                          | 213      | 281     | 185     | 90       |
| ADMIN & SUPPORT, WASTE MGT & REMED            | 786   | 481    | 119    | 86     | 100    | 27%         | 75%  | 16%  | 12%  | 12%  | (2,161)                      | (158)    | (604)   | (660)   | (738)    |
| EDUCATIONAL SERVICES                          | 385   | 75     | 114    | 69     | 126    | 18%         | 16%  | 21%  | 13%  | 23%  | (1,733)                      | (404)    | (434)   | (481)   | (414)    |
| HEALTH CARE AND SOCIAL ASSISTANCE             | 46,010  | 11,909 | 11,921 | 11,575 | 10,606 | 141%        | 150% | 137% | 148% | 129% | 13,347                       | 3,960    | 3,235   | 3,780   | 2,372    |
| Ambulatory Health Care Services               | 14,173  | 3,524  | 4,023  | 3,889  | 2,736  | 99%         | 96%  | 105% | 113% | 81%  | (126)                        | (137)    | 201     | 442     | (632)    |
| Offices of Physicians (except mental health)  | 525   | 86     | 139    | 98     | 201    | 95%         | 77%  | 104% | 72%  | 118% | (28)                         | (26)     | 5       | (38)    | 31       |
| Offices of Dentists                           | 1,279   | 267    | 291    | 304    | 417    | 174%        | 185% | 147% | 169% | 194% | 543                          | 123      | 94      | 124     | 202      |
| Offices of Physical Occup & Speech Therapists | 107   |        | 60     |        | 48     | 89%         |      | 183% |      | 128% | (13)                         |          | 27      |         | 10       |
| Hospitals                                     | 21,304  | 5,333  | 5,320  | 5,432  | 5,219  | 196%        | 198% | 188% | 207% | 193% | 10,452                       | 2,646    | 2,483   | 2,811   | 2,512    |
| Child Day Care Services                       | 210   | 49     | 50     | 58     | 53     | 78%         | 103% | 64%  | 79%  | 76%  | (58)                         | 1        | (28)    | (15)    | (17)     |
| ARTS, ENTERTAINMENT, AND RECREATION           | 624   | 208    | 123    | 130    | 164    | 28%         | 40%  | 26%  | 21%  | 29%  | (1,568)                      | (317)    | (351)   | (497)   | (403)    |

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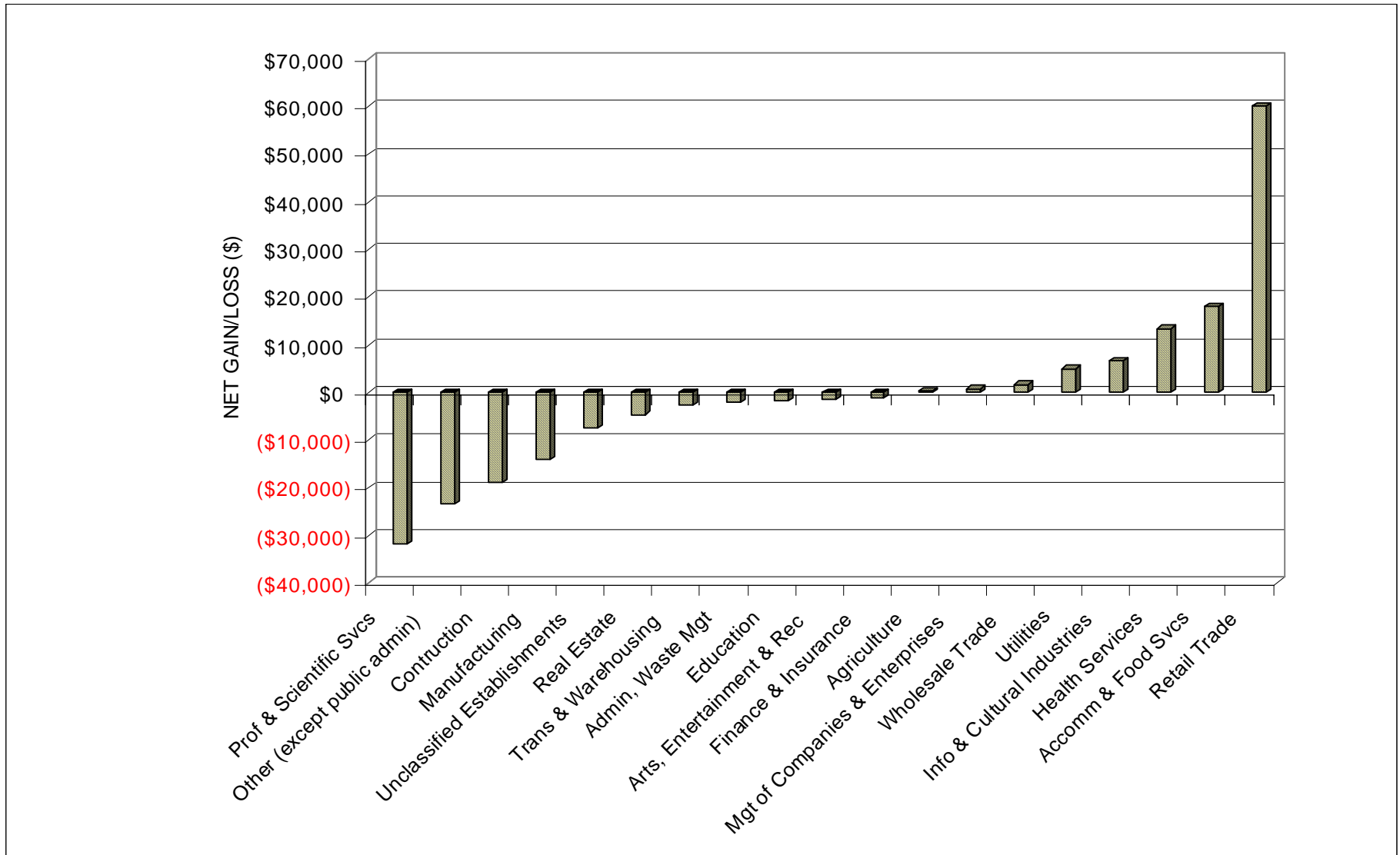
**TABLE 7: CLOVIS TAXABLE GROSS RECEIPTS AND PULL FACTORS, 2005, CONTINUED**

| <b>CLOVIS</b>                               | <b>TAXABLE GROSS RECEIPTS and FOOD &amp; MEDICAL DEDUCTIONS (Thousands \$)</b> |                |                |                |                | <b>PULL FACTOR</b> |             |             |             |             | <b>NET GAIN/LOSS (Thousands \$)</b> |                |                |                |                 |
|---|--|----------------|----------------|----------------|----------------|--------------------|-------------|-------------|-------------|-------------|-------------------------------------|----------------|----------------|----------------|-----------------|
|   | <b>2005</b>  | <b>Q1</b>      | <b>Q2</b>      | <b>Q3</b>      | <b>Q4</b>      | <b>2005</b>        | <b>Q1</b>   | <b>Q2</b>   | <b>Q3</b>   | <b>Q4</b>   | <b>2005</b>                         | <b>Q1</b>      | <b>Q2</b>      | <b>Q3</b>      | <b>Q4</b>       |
| Amusement, Gambling & Recreation Industries | 590  | 202            | 115            | 116            | 157            | 42%                | 53%         | 35%         | 31%         | 49%         | (818)                               | (181)          | (211)          | (263)          | (163)           |
| <b>ACCOMMODATION AND FOOD SERVICES</b>      | <b>61,480</b>  | <b>14,751</b>  | <b>15,608</b>  | <b>16,495</b>  | <b>14,626</b>  | <b>141%</b>        | <b>148%</b> | <b>139%</b> | <b>146%</b> | <b>133%</b> | <b>17,942</b>                       | <b>4,770</b>   | <b>4,340</b>   | <b>5,185</b>   | <b>3,646</b>    |
| Accommodations                              | 4,724  | 1,189          | 1,158          | 1,336          | 1,041          | 58%                | 63%         | 55%         | 57%         | 55%         | (3,477)                             | (711)          | (936)          | (989)          | (842)           |
| Eating & Drinking Establishments            | 53,172   | 12,663         | 13,597         | 14,227         | 12,685         | 160%               | 164%        | 158%        | 170%        | 150%        | 19,999                              | 4,935          | 4,994          | 5,861          | 4,208           |
| Drinking Places (Alcoholic Beverages)       | 5,352  | 1,381          | 1,452          | 1,056          | 1,463          | 167%               | 192%        | 186%        | 117%        | 182%        | 2,146                               | 663            | 670            | 152            | 661             |
| <b>OTHER SERVICES (EXCEPT PUBLIC ADMIN)</b> | <b>63,157</b>  | <b>15,176</b>  | <b>16,276</b>  | <b>15,924</b>  | <b>15,781</b>  | <b>73%</b>         | <b>76%</b>  | <b>75%</b>  | <b>73%</b>  | <b>68%</b>  | <b>(23,421)</b>                     | <b>(4,728)</b> | <b>(5,345)</b> | <b>(6,030)</b> | <b>(7,318)</b>  |
| Automotive Repair & Maintenance             | 13,716   | 3,245          | 3,471          | 3,879          | 3,122          | 152%               | 156%        | 153%        | 157%        | 143%        | 4,719                               | 1,169          | 1,203          | 1,405          | 941             |
| Personal & Household Goods Repair & Mntc    | 963  | 227            | 306            | 216            | 214            | 32%                | 34%         | 39%         | 29%         | 26%         | (2,065)                             | (435)          | (479)          | (533)          | (616)           |
| Personal & Laundry Services                 | 4,208  | 1,091          | 1,333          | 778            | 1,007          | 62%                | 66%         | 75%         | 48%         | 57%         | (2,601)                             | (564)          | (447)          | (833)          | (757)           |
| <b>UNCLASSIFIED ESTABLISHMENTS</b>          | <b>28</b>  | <b>18</b>      | <b>10</b>      |                |                | <b>0%</b>          | <b>1%</b>   | <b>0%</b>   |             |             | <b>(7,447)</b>                      | <b>(2,173)</b> | <b>(2,503)</b> |                |                 |
| <b>TOTAL</b>                                | <b>666,888</b>   | <b>155,217</b> | <b>166,078</b> | <b>172,542</b> | <b>173,051</b> | <b>95%</b>         | <b>96%</b>  | <b>96%</b>  | <b>97%</b>  | <b>91%</b>  | <b>(36,373)</b>                     | <b>(6,475)</b> | <b>(7,524)</b> | <b>(4,699)</b> | <b>(17,675)</b> |

\* Misc Store Retailers (ALL) includes Department Stores; Other General Merchandise Stores; Misc Store Retailers; and All Other Misc Stores.

Source: State of New Mexico Taxation and Revenue Department Combined Reporting System; Report No. 80 – NAICS Code Version; Calculations by BBER, 2007.

**FIGURE 3: CLOVIS TAXABLE GROSS RECEIPTS GAIN/LOSS, BY INDUSTRY, 2005**



Source: State of New Mexico Taxation & Revenue Department Combined Reporting System; Report No. 80 -- NAICS Code Version; Calculations by BBER, 2007.

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**TABLE 8: LOCATION QUOTIENT: CLOVIS EMPLOYMENT, BY INDUSTRY, IN RELATION TO CURRY COUNTY, THE EASTERN PLAINS NEW MEXICO REGION, AND NEW MEXICO; CURRY COUNTY IN RELATION TO THE EASTERN PLAINS NEW MEXICO REGION AND NEW MEXICO; AND THE EASTERN PLAINS NEW MEXICO REGION IN RELATION TO NEW MEXICO**

|  | CLOVIS       |                |             | CURRY COUNTY   |             | EASTERN PLAINS |
|--|--------------|----------------|-------------|----------------|-------------|----------------|
|  | Curry County | Eastern Plains | New Mexico  | Eastern Plains | New Mexico  | New Mexico     |
| <b>Base Geography</b>  |              |                |             |                |             |                |
| <b>Agriculture; forestry; fishing and hunting; and mining</b>                              | <b>0.62</b>  | <b>0.44</b>    | <b>0.91</b> | <b>0.71</b>    | <b>1.47</b> | <b>2.07</b>    |
| Agriculture; forestry; fishing and hunting   | 0.60         | 0.43           | 1.57        | 0.71           | 2.62        | 3.68           |
| Mining   | 1.04         | 0.65           | 0.18        | 0.63           | 0.17        | 0.27           |
| <b>Construction</b>  | <b>0.82</b>  | <b>0.79</b>    | <b>0.65</b> | <b>0.96</b>    | <b>0.79</b> | <b>0.82</b>    |
| <b>Manufacturing</b>   | <b>1.06</b>  | <b>1.27</b>    | <b>0.87</b> | <b>1.20</b>    | <b>0.83</b> | <b>0.69</b>    |
| <b>Wholesale trade</b>   | <b>0.90</b>  | <b>0.96</b>    | <b>0.62</b> | <b>1.07</b>    | <b>0.68</b> | <b>0.64</b>    |
| <b>Retail trade</b>  | <b>1.08</b>  | <b>1.17</b>    | <b>1.44</b> | <b>1.08</b>    | <b>1.34</b> | <b>1.24</b>    |
| <b>Transportation and warehousing; and utilities</b>                                       | <b>1.02</b>  | <b>1.15</b>    | <b>1.62</b> | <b>1.13</b>    | <b>1.60</b> | <b>1.42</b>    |
| Transportation and warehousing   | 1.05         | 1.20           | 1.96        | 1.14           | 1.87        | 1.64           |
| Utilities  | 0.80         | 0.84           | 0.66        | 1.05           | 0.82        | 0.78           |
| <b>Information</b>   | <b>1.01</b>  | <b>0.93</b>    | <b>0.91</b> | <b>0.92</b>    | <b>0.91</b> | <b>0.99</b>    |
| <b>Finance; insurance; real estate and rental and leasing</b>                              | <b>1.06</b>  | <b>1.18</b>    | <b>0.94</b> | <b>1.11</b>    | <b>0.89</b> | <b>0.80</b>    |
| Finance and insurance  | 1.05         | 1.21           | 1.09        | 1.15           | 1.04        | 0.90           |
| Real estate and rental and leasing   | 1.09         | 1.10           | 0.69        | 1.01           | 0.63        | 0.63           |
| <b>Professional; scientific; management; administrative; and waste management services</b> | <b>1.05</b>  | <b>1.28</b>    | <b>0.59</b> | <b>1.22</b>    | <b>0.56</b> | <b>0.46</b>    |
| Professional; scientific; and technical services   | 1.07         | 1.42           | 0.53        | 1.33           | 0.50        | 0.38           |
| Management of companies and enterprises  | 0.00         | 0.00           | 0.00        | 0.00           | 0.00        | 0.00           |
| Administrative and support and waste management services                                   | 1.02         | 1.12           | 0.70        | 1.09           | 0.68        | 0.63           |
| <b>Educational; health and social services</b>   | <b>1.07</b>  | <b>0.98</b>    | <b>1.10</b> | <b>0.92</b>    | <b>1.03</b> | <b>1.12</b>    |
| Educational services   | 1.07         | 0.82           | 1.05        | 0.77           | 0.98        | 1.28           |
| Health care and social assistance  | 1.07         | 1.20           | 1.15        | 1.12           | 1.07        | 0.96           |
| <b>Arts; entertainment; recreation; accommodation and food services</b>                    | <b>1.09</b>  | <b>0.99</b>    | <b>0.88</b> | <b>0.91</b>    | <b>0.81</b> | <b>0.89</b>    |
| Arts; entertainment; and recreation  | 1.12         | 1.23           | 0.47        | 1.10           | 0.42        | 0.38           |
| Accommodation and food services  | 1.08         | 0.97           | 1.01        | 0.89           | 0.93        | 1.04           |
| <b>Other services (except public administration)</b>                                       |              | <b>1.07</b>    | <b>1.16</b> | <b>1.12</b>    | <b>1.22</b> | <b>1.09</b>    |
| <b>Public administration</b>   | <b>0.92</b>  | <b>0.96</b>    | <b>0.92</b> | <b>1.05</b>    | <b>1.00</b> | <b>0.95</b>    |

Source: Census 2000 Summary File 3 (SF 3) - Sample Data; P49. Universe: Employed civilian population 16 years and over. Calculations by BBER, 2007.

CLOVIS MAINSTREET – Community Economic Assessment

**TABLE 9: LOCATION QUOTIENT: CLOVIS EMPLOYMENT, BY OCCUPATION, IN RELATION TO CURRY COUNTY, THE EASTERN PLAINS NEW MEXICO REGION, AND NEW MEXICO; CURRY COUNTY IN RELATION TO THE EASTERN PLAINS NEW MEXICO REGION AND NEW MEXICO; AND THE EASTERN PLAINS NEW MEXICO REGION IN RELATION TO NEW MEXICO**

|  | CLOVIS       |                |             | CURRY COUNTY   |             | EASTERN PLAINS |
|--|--------------|----------------|-------------|----------------|-------------|----------------|
|  | Curry County | Eastern Plains | New Mexico  | Eastern Plains | New Mexico  | New Mexico     |
| <b>Base Geography</b>                                      |              |                |             |                |             |                |
| <b>Management; professional; and related occupations</b>   | <b>1.02</b>  | <b>0.95</b>    | <b>0.82</b> | <b>0.93</b>    | <b>0.81</b> | <b>0.87</b>    |
| Management; business; and financial operations occupations | 0.96         | 0.88           | 0.86        | 0.92           | 0.90        | 0.98           |
| Management occupations; except farmers                     | 1.06         | 1.02           | 0.78        | 0.96           | 0.74        | 0.77           |
| Farmers and farm managers                                  | 0.55         | 0.34           | 1.79        | 0.62           | 3.25        | 5.21           |
| Business and financial operations occupations              | 1.07         | 1.41           | 0.86        | 1.31           | 0.80        | 0.61           |
| Business operations specialists                            | 0.92         | 1.29           | 0.57        | 1.40           | 0.62        | 0.44           |
| Financial specialists                                      | 1.16         | 1.47           | 1.12        | 1.26           | 0.97        | 0.76           |
| Professional and related occupations                       | 1.06         | 0.99           | 0.80        | 0.94           | 0.75        | 0.81           |
| Computer and mathematical occupations                      | 1.09         | 0.87           | 0.28        | 0.80           | 0.26        | 0.32           |
| Architecture and engineering occupations                   | 1.08         | 1.31           | 0.38        | 1.22           | 0.35        | 0.29           |
| Architects; surveyors; cartographers; and engineers        | 0.98         | 1.11           | 0.18        | 1.12           | 0.18        | 0.16           |
| Drafters; engineering; and mapping technicians             | 1.12         | 1.43           | 0.76        | 1.27           | 0.67        | 0.53           |
| Life; physical; and social science occupations             | 1.20         | 1.17           | 0.33        | 0.98           | 0.28        | 0.28           |
| Community and social services occupations                  | 1.08         | 1.01           | 1.35        | 0.94           | 1.25        | 1.34           |
| Legal occupations  | 1.02         | 1.30           | 0.66        | 1.27           | 0.64        | 0.51           |
| <b>Education; training; and library occupations</b>        | <b>1.05</b>  | <b>0.86</b>    | <b>1.06</b> | <b>0.82</b>    | <b>1.01</b> | <b>1.23</b>    |
| Arts; design; entertainment; sports; and media occupations | 1.16         | 0.77           | 0.40        | 0.66           | 0.35        | 0.53           |
| Healthcare practitioners and technical occupations         | 1.03         | 1.22           | 1.03        | 1.18           | 1.00        | 0.85           |
| <b>Service occupations</b>                                 | <b>1.04</b>  | <b>1.06</b>    | <b>1.12</b> | <b>1.02</b>    | <b>1.08</b> | <b>1.06</b>    |
| Healthcare support occupations                             | 1.03         | 1.12           | 1.14        | 1.09           | 1.10        | 1.01           |
| Protective service occupations                             | 1.06         | 1.13           | 0.98        | 1.06           | 0.92        | 0.87           |
| Food preparation and serving related occupations           | 1.05         | 1.00           | 1.11        | 0.95           | 1.05        | 1.11           |
| Building and grounds cleaning and maintenance occupations  | 1.03         | 1.08           | 1.12        | 1.05           | 1.09        | 1.04           |
| Personal care and service occupations                      | 1.02         | 1.06           | 1.24        | 1.04           | 1.22        | 1.18           |
| <b>Sales and office occupations</b>                        | <b>1.02</b>  | <b>1.09</b>    | <b>1.08</b> | <b>1.06</b>    | <b>1.05</b> | <b>0.99</b>    |
| Sales and related occupations                              | 1.09         | 1.21           | 1.30        | 1.12           | 1.20        | 1.07           |
| Office and administrative support occupations              | 0.96         | 0.97           | 0.91        | 1.02           | 0.95        | 0.93           |

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**TABLE 9: LOCATION QUOTIENT: CLOVIS EMPLOYMENT, BY OCCUPATION, IN RELATION TO CURRY COUNTY, THE EASTERN PLAINS NEW MEXICO REGION, AND NEW MEXICO; CURRY COUNTY IN RELATION TO THE EASTERN PLAINS NEW MEXICO REGION AND NEW MEXICO; AND THE EASTERN PLAINS NEW MEXICO REGION IN RELATION TO NEW MEXICO, CONTINUED**

|  | CLOVIS       |                |             | CURRY COUNTY   |             | EASTERN PLAINS |
|--|--------------|----------------|-------------|----------------|-------------|----------------|
|  | Curry County | Eastern Plains | New Mexico  | Eastern Plains | New Mexico  | New Mexico     |
| <b>Base Geography</b>  |              |                |             |                |             |                |
| <b>Farming; fishing; and forestry occupations</b>                  | <b>0.63</b>  | <b>0.45</b>    | <b>1.47</b> | <b>0.72</b>    | <b>2.33</b> | <b>3.24</b>    |
| <b>Construction; extraction; and maintenance occupations</b>       | <b>0.91</b>  | <b>0.93</b>    | <b>0.92</b> | <b>1.02</b>    | <b>1.01</b> | <b>0.99</b>    |
| Construction and extraction occupations                            | 0.88         | 0.83           | 0.68        | 0.95           | 0.78        | 0.82           |
| Supervisors; construction and extraction workers                   | 0.64         | 0.64           | 0.54        | 1.01           | 0.85        | 0.85           |
| Construction trades workers  | 0.90         | 0.84           | 0.72        | 0.93           | 0.80        | 0.86           |
| Extraction workers   | 1.30         | 1.87           | 0.55        | 1.44           | 0.42        | 0.29           |
| Installation; maintenance; and repair occupations                  | 0.95         | 1.03           | 1.31        | 1.09           | 1.38        | 1.27           |
| <b>Production; transportation; and material moving occupations</b> | <b>1.00</b>  | <b>1.07</b>    | <b>1.23</b> | <b>1.07</b>    | <b>1.23</b> | <b>1.15</b>    |
| Production occupations   | 0.94         | 1.02           | 0.91        | 1.08           | 0.97        | 0.90           |
| Transportation and material moving occupations                     | 1.05         | 1.11           | 1.54        | 1.06           | 1.47        | 1.39           |

Source: Census 2000 Summary File 3 (SF 3) - Sample Data; P49. Universe: Employed civilian population 16 years and over. Calculations by BBER, 2007.

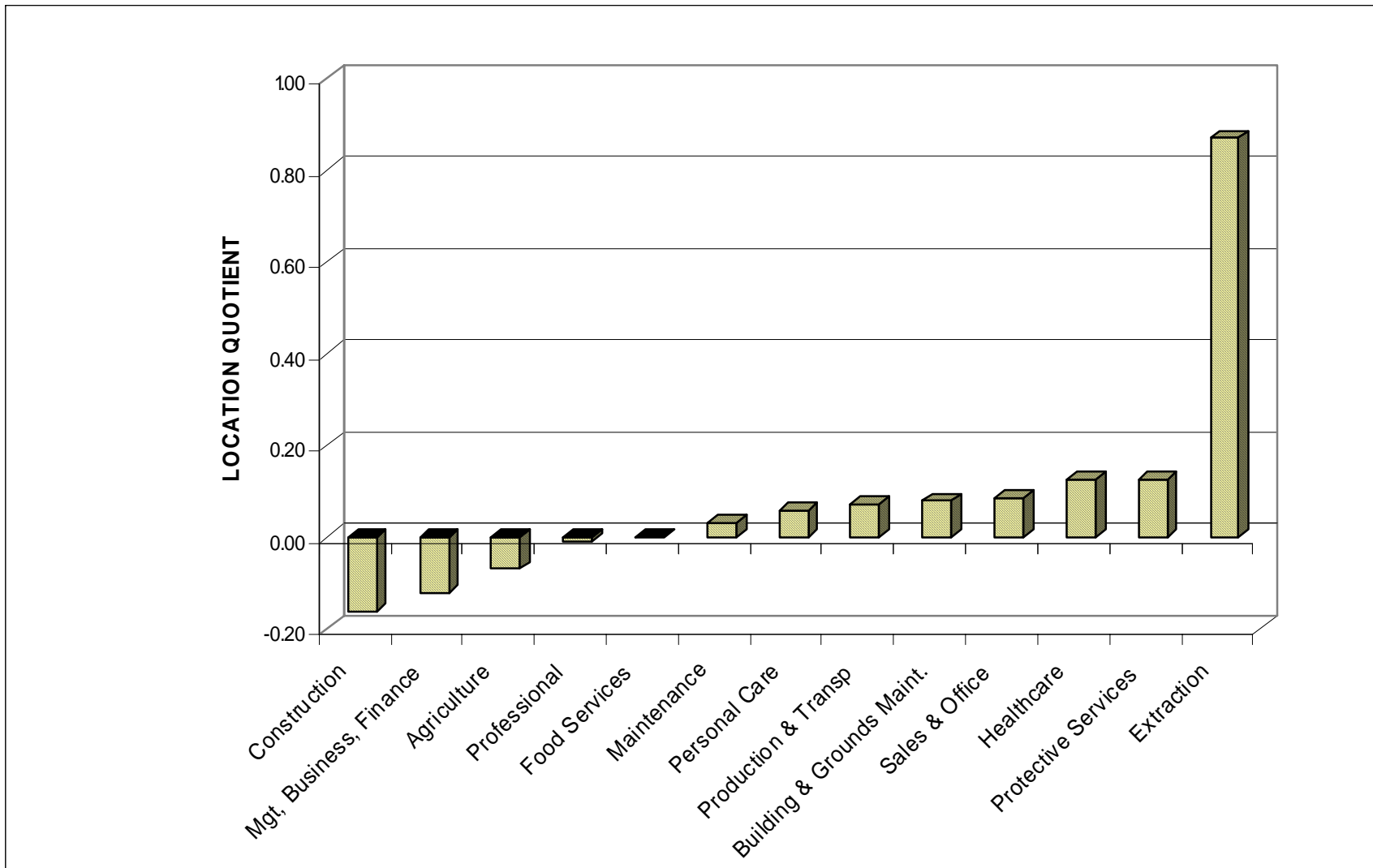
CLOVIS MAINSTREET – Community Economic Assessment

**TABLE 10: LOCATION QUOTIENT: CLOVIS EMPLOYMENT, BY BUSINESS OWNERSHIP, IN RELATION TO CURRY COUNTY, THE EASTERN PLAINS NEW MEXICO REGION, AND NEW MEXICO; CURRY COUNTY IN RELATION TO THE EASTERN PLAINS NEW MEXICO REGION AND NEW MEXICO; AND THE EASTERN PLAINS NEW MEXICO REGION IN RELATION TO NEW MEXICO**

|   | CLOVIS       |                |             | CURRY COUNTY   |             | EASTERN PLAINS |
|---|--------------|----------------|-------------|----------------|-------------|----------------|
|   | Curry County | Eastern Plains | New Mexico  | Eastern Plains | New Mexico  | New Mexico     |
| <b>Base Geography</b>   |              |                |             |                |             |                |
| <b>Private for-profit wage and salary workers</b>             | <b>1.02</b>  | <b>1.08</b>    | <b>1.02</b> | <b>1.06</b>    | <b>1.00</b> | <b>0.94</b>    |
| Employee of private company                                   | 1.03         | 1.08           | 1.02        | 1.05           | 0.99        | 0.94           |
| Self-employed in own incorporated business                    | 0.95         | 1.09           | 1.01        | 1.15           | 1.07        | 0.93           |
| <b>Private not-for-profit wage and salary workers</b>         | <b>1.08</b>  | <b>1.11</b>    | <b>0.96</b> | <b>1.03</b>    | <b>0.89</b> | <b>0.86</b>    |
| <b>Local government workers</b>                               | <b>1.00</b>  | <b>0.89</b>    | <b>0.92</b> | <b>0.90</b>    | <b>0.93</b> | <b>1.03</b>    |
| <b>State government workers</b>                               | <b>1.10</b>  | <b>0.80</b>    | <b>0.98</b> | <b>0.73</b>    | <b>0.89</b> | <b>1.23</b>    |
| <b>Federal government workers</b>                             | <b>0.84</b>  | <b>1.03</b>    | <b>0.92</b> | <b>1.23</b>    | <b>1.10</b> | <b>0.90</b>    |
| <b>Self-employed workers in own not incorporated business</b> | <b>0.88</b>  | <b>0.79</b>    | <b>1.08</b> | <b>0.91</b>    | <b>1.24</b> | <b>1.36</b>    |
| <b>Unpaid family workers</b>                                  | <b>0.45</b>  | <b>0.30</b>    | <b>0.36</b> | <b>0.66</b>    | <b>0.80</b> | <b>1.21</b>    |

Source: Census 2000 Summary File 3 (SF 3) - Sample Data; P51 Universe: Employed civilian population 16 years and over. Calculations by BBER, 2007.

**FIGURE 4: CLOVIS LOCATION QUOTIENTS, BY OCCUPATION, 2005**



Source: Census 2000 Summary File 3 (SF 3) - Sample Data; P51 Universe: Employed civilian population 16 years and over. Calculations by BBER, 2007.



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**TABLE 11: CLOVIS BUSINESSES BY INDUSTRY, BY LOCAL GEOGRAPHY, 2005**

| <b>INDUSTRY</b>                    | <b>MS<sup>1</sup></b> | <b>CLOVIS<sup>2</sup></b> | <b>MS%<sup>3</sup></b> | <b>COUNTY<sup>4</sup></b> | <b>TOTAL<sup>5</sup></b> |
|------------------------------------|-----------------------|---------------------------|------------------------|---------------------------|--------------------------|
| Agriculture, Forestry              |                       | 47                        |                        | 19                        | 66                       |
| Mining                             |                       | 2                         |                        |                           | 2                        |
| Utilities                          | 2                     | 4                         | 33%                    | 3                         | 9                        |
| Construction                       | 3                     | 120                       | 2%                     | 18                        | 141                      |
| Manufacturing                      | 6                     | 27                        | 18%                    | 4                         | 37                       |
| Wholesale trade                    | 1                     | 55                        | 2%                     | 5                         | 61                       |
| Retail Trade                       | 33                    | 167                       | 17%                    | 17                        | 217                      |
| Transportation & Warehousing       | 3                     | 39                        | 7%                     | 14                        | 56                       |
| Information                        | 7                     | 12                        | 37%                    | 5                         | 24                       |
| Finance & Insurance                | 17                    | 48                        | 26%                    | 7                         | 72                       |
| Real Estate, Rental & Leasing      | 5                     | 41                        | 11%                    | 4                         | 50                       |
| Prof, Scientific, Tech Services    | 22                    | 43                        | 34%                    | 11                        | 76                       |
| Mgt of Companies                   |                       | 3                         |                        |                           | 3                        |
| Administrative & Support Services  | 6                     | 32                        | 16%                    | 15                        | 53                       |
| Educational Services               | 1                     | 2                         | 33%                    | 7                         | 10                       |
| Health Care and Social Assistance  | 10                    | 100                       | 9%                     | 14                        | 124                      |
| Arts, Entertainment and Recreation | 1                     | 12                        | 8%                     |                           | 13                       |
| Accommodations & Food Services     | 5                     | 59                        | 8%                     | 12                        | 76                       |
| Other Services                     | 9                     | 78                        | 10%                    | 9                         | 96                       |
| Public Administration              | 17                    | 16                        | 52%                    | 12                        | 45                       |
| Other                              | 1                     | 3                         | 25%                    |                           | 4                        |
| <b>TOTAL</b>                       | <b>149</b>            | <b>910</b>                | <b>14%</b>             | <b>176</b>                | <b>1,235</b>             |

1 MainStreet District.

2 Town, not including MainStreet District.

3 MainStreet District as a percentage of entire town.

4 County, not including town.

5 County total.

Source: NM Department of Labor, ES-202 (Covered Employment Statistics), 2005. Calculations by BBER, 2007.

CLOVIS MAINSTREET – Community Economic Assessment

**TABLE 12: CLOVIS EMPLOYMENT BY INDUSTRY, IN MAINSTREET AREA, 2005**

| INDUSTRY                           | MS <sup>1</sup> | CLOVIS <sup>2</sup> | MS% <sup>3</sup> | COUNTY <sup>4</sup> | TOTAL <sup>5</sup> |
|------------------------------------|-----------------|---------------------|------------------|---------------------|--------------------|
| Agriculture, Forestry              |                 | 996                 |                  | 316                 | 1,313              |
| Mining                             |                 | 3                   |                  |                     | 3                  |
| Utilities                          | 24              | 71                  | 25%              | 12                  | 107                |
| Construction                       | 12              | 1,004               | 1%               | 73                  | 1,089              |
| Manufacturing                      | 25              | 386                 | 6%               | 36                  | 447                |
| Wholesale trade                    | 1               | 428                 | 0%               | 6                   | 435                |
| Retail Trade                       | 203             | 2,161               | 9%               | 109                 | 2,473              |
| Transportation & Warehousing       | 28              | 460                 | 6%               | 35                  | 522                |
| Information                        | 133             | 81                  | 62%              | 42                  | 256                |
| Finance & Insurance                | 245             | 316                 | 44%              | 11                  | 572                |
| Real Estate, Rental & Leasing      | 12              | 129                 | 8%               | 4                   | 145                |
| Prof, Scientific, Tech Services    | 111             | 165                 | 40%              | 32                  | 307                |
| Mgt of Companies                   |                 | 333                 |                  |                     | 333                |
| Administrative & Support Services  | 49              | 316                 | 13%              | 45                  | 411                |
| Health Care and Social Assistance  | 115             | 2,327               | 5%               | 247                 | 2,689              |
| Arts, Entertainment and Recreation | 0               | 185                 | 0%               |                     | 185                |
| Accommodations & Food Services     | 82              | 1,491               | 5%               | 111                 | 1,684              |
| Other Services                     | 25              | 398                 | 6%               | 36                  | 459                |
| Public Administration              | 361             | 192                 | 65%              | 466                 | 1,018              |
| Other                              | 0               | 3                   |                  |                     | 3                  |
| <b>TOTAL</b>                       | <b>1,470</b>    | <b>11,736</b>       | <b>11%</b>       | <b>1,779</b>        | <b>16,034</b>      |

1 MainStreet District.

2 Town, not including MainStreet District.

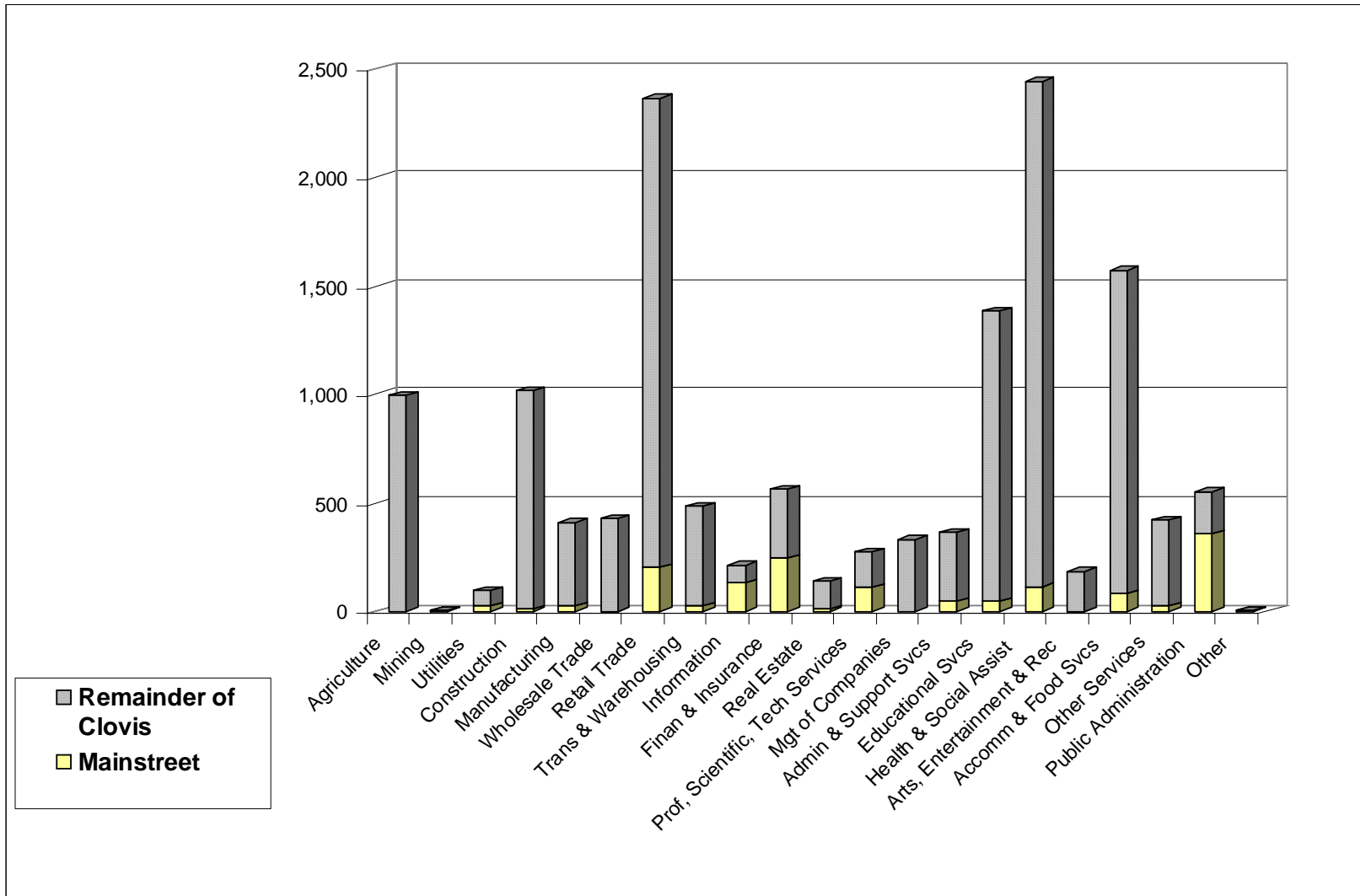
3 MainStreet District as a percentage of entire town.

4 County, not including town.

5 County total.

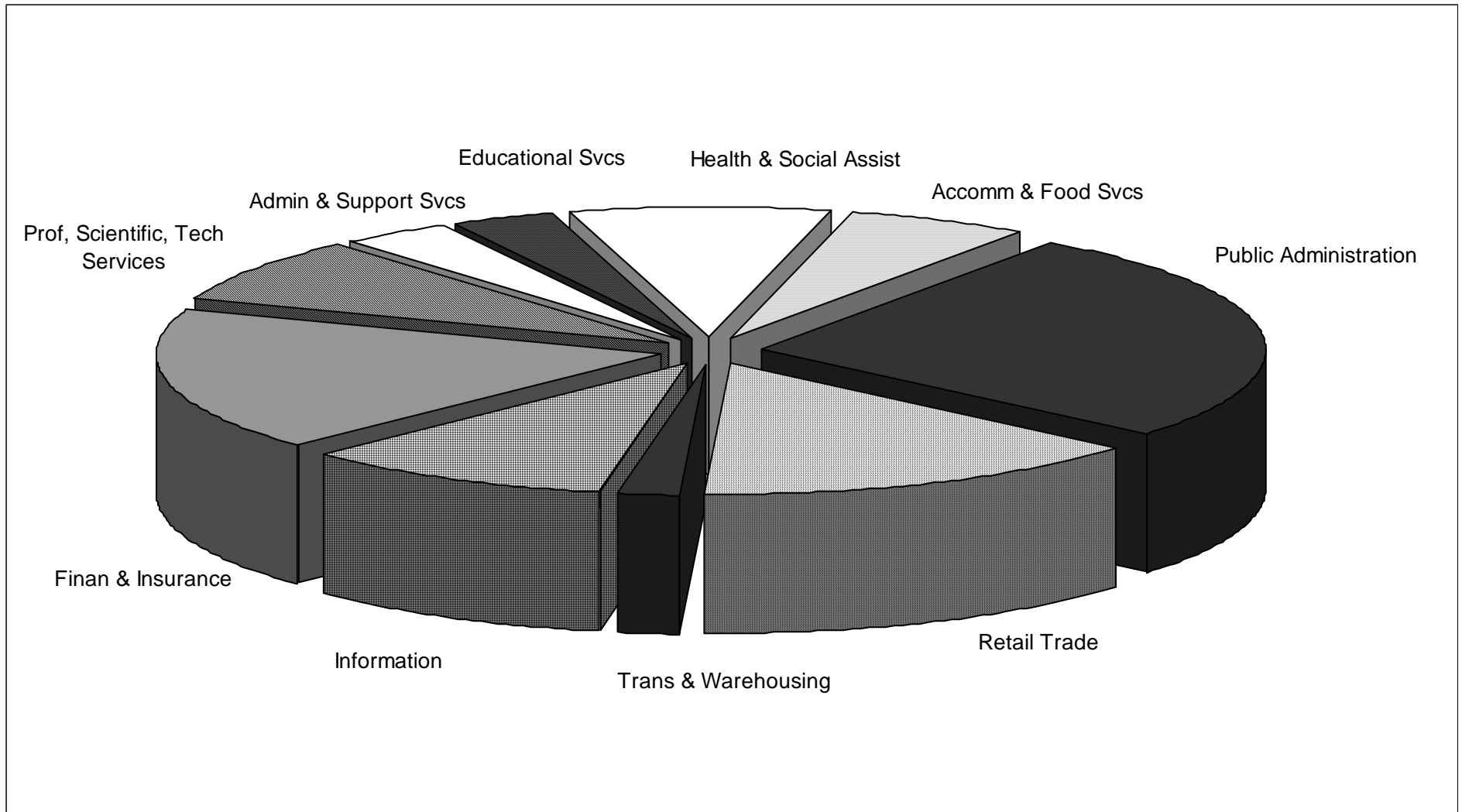
Source: NM Department of Labor, ES-202 (Covered Employment Statistics), 2005. Calculations by BBER, 2007.

**FIGURE 5: CLOVIS EMPLOYMENT, BY INDUSTRY AND LOCAL GEOGRAPHY, 2005**



Source: NM Department of Labor, ES-202 (Covered Employment Statistics), 2005. Calculations by BBER, 2007.

**FIGURE 6: CLOVIS EMPLOYMENT IN MAINSTREET AREA, BY INDUSTRY, 2005**



Source: NM Department of Labor, ES-202 (Covered Employment Statistics), 2005. Calculations by BBER, 2007.

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**TABLE 13: CLOVIS EMPLOYMENT BY 3-DIGIT RETAIL & SERVICE SUBSECTOR, IN MAINSTREET AREA, 2005**

| NAICS INDUSTRY  | MS <sup>1</sup> | CLOVIS <sup>2</sup> | MS% <sup>3</sup> | COUNTY <sup>4</sup> | TOTAL <sup>5</sup> |
|---|-----------------|---------------------|------------------|---------------------|--------------------|
| 423 Merchant Wholesalers, Durable Goods               |                 | 134                 |                  | 3                   | 138                |
| 424 Merchant Wholesalers, Nondurable Goods            | 1               | 291                 | 0%               |                     | 292                |
| 425 Wholesale Electronic Markets                      |                 | 2                   |                  | 3                   | 5                  |
| 441 Motor Vehicle & Parts Dealers                     | 34              | 418                 | 8%               | 4                   | 456                |
| 442 Furniture & Home Furnishings Stores               | 48              | 11                  | 82%              |                     | 59                 |
| 443 Electronics & Appliance Stores                    | 5               | 41                  | 11%              | 10                  | 56                 |
| 444 Building Material, Garden Equipment Dealers       | 3               | 265                 | 1%               |                     | 268                |
| 445 Food & Beverage Stores                            | 37              | 155                 | 19%              | 37                  | 229                |
| 446 Health & Personal Care Stores                     |                 | 101                 |                  | 6                   | 107                |
| 447 Gasoline Stations                                 | 9               | 98                  | 9%               | 39                  | 147                |
| 448 Clothing & Clothing Accessories Stores            | 20              | 84                  | 19%              |                     | 104                |
| 451 Sporting Goods, Hobby, Book, & Music Stores       | 9               | 70                  | 11%              | 1                   | 80                 |
| 452 General Merchandise Stores                        |                 | 855                 |                  | 0                   | 855                |
| 453 Miscellaneous Store Retailers                     | 30              | 52                  | 36%              | 11                  | 93                 |
| 454 Nonstore Retailers                                | 8               | 11                  | 42%              |                     | 19                 |
| 484 Truck Transportation                              | 27              | 130                 | 17%              | 19                  | 177                |
| 485 Transit and Ground Passenger Transport            |                 | 48                  |                  | 15                  | 64                 |
| 486 Pipeline Transportation                           |                 | 22                  |                  |                     | 22                 |
| 488 Support Services for Transportation               | 0               | 133                 | 0%               | 1                   | 134                |
| 491 Postal Service                                    |                 | 78                  |                  |                     | 78                 |
| 492 Couriers and Messengers                           |                 | 29                  |                  |                     | 29                 |
| 493 Warehousing and Storage                           |                 | 17                  |                  |                     | 17                 |
| 511 Publishing Industries                             | 71              |                     | 100%             |                     | 71                 |
| 512 Motion Picture & Sound Recording Industries       |                 | 25                  |                  |                     | 25                 |
| 515 Broadcasting (except Internet)                    | 14              | 24                  | 37%              | 10                  | 47                 |
| 517 Telecommunications                                | 29              | 30                  | 49%              | 0                   | 60                 |
| 518 Internet Service Providers & Data Processing Svcs | 3               | 2                   | 69%              | 20                  | 25                 |
| 519 Other Information Services                        | 16              |                     | 100%             | 12                  | 28                 |
| 522 Credit Intermediation & Related Activities        | 174             | 248                 | 41%              | 6                   | 428                |
| 523 Securities, Commodity Contracts & Fin Investments | 2               | 32                  | 6%               | 2                   | 36                 |
| 524 Insurance Carriers & Related Activities           | 69              | 36                  | 66%              | 3                   | 108                |
| 531 Real Estate                                       | 12              | 84                  | 12%              | 4                   | 100                |
| 532 Rental & Leasing Services                         |                 | 45                  |                  |                     | 45                 |
| 541 Professional, Scientific, & Technical Services    | 111             | 165                 | 40%              | 32                  | 307                |
| 551 Management of Companies & Enterprises             |                 | 333                 |                  |                     | 333                |

CLOVIS MAINSTREET – Community Economic Assessment

**TABLE 13: CLOVIS EMPLOYMENT BY 3-DIGIT RETAIL & SERVICE SUBSECTOR, IN MAINSTREET AREA, 2005, CONTINUED**

| NAICS INDUSTRY                                    | MS <sup>1</sup> | CLOVIS <sup>2</sup> | MS% <sup>3</sup> | COUNTY <sup>4</sup> | TOTAL <sup>5</sup> |
|---|-----------------|---------------------|------------------|---------------------|--------------------|
| 561 Administrative & Support Services             | 49              | 231                 | 17%              | 38                  | 318                |
| 562 Waste Management & Remediation Service        |                 | 85                  |                  | 8                   | 93                 |
| 611 Educational Services                          | 1,094           | 292                 | 79%              | 198                 | 1,585              |
| 621 Ambulatory Health Care Services               | 8               | 991                 | 1%               | 29                  | 1,029              |
| 622 Hospitals                                     |                 | 616                 |                  |                     | 616                |
| 623 Nursing & Residential Care Facilities         |                 | 172                 |                  | 195                 | 367                |
| 624 Social Assistance                             | 106             | 549                 | 16%              | 23                  | 678                |
| 713 Amusement, Gambling & Recreation Industries   |                 | 184                 |                  |                     | 184                |
| 721 Accommodation                                 |                 | 178                 |                  | 18                  | 196                |
| 722 Food Services & Drinking Places               | 82              | 1,313               | 6%               | 93                  | 1,488              |
| 811 Repair & Maintenance                          | 11              | 166                 | 6%               | 20                  | 197                |
| 812 Personal & Laundry Services                   |                 | 128                 |                  | 8                   | 136                |
| 813 Religious, Grantmaking, Civic, Prof. Orgs     | 15              | 97                  | 13%              |                     | 112                |
| 814 Private Households                            | 0               | 7                   |                  | 8                   | 14                 |
| 921 Executive, Legislative & Gov't Support        | 104             | 7                   | 93%              | 34                  | 145                |
| 922 Justice, Public Order, and Safety Activities  | 242             | 118                 | 67%              | 10                  | 370                |
| 923 Administration of Human Resource Programs     |                 | 10                  |                  |                     | 10                 |
| 924 Admin of Environmental Quality Programs       | 4               | 17                  | 19%              | 5                   | 26                 |
| 925 Admin of Housing, Urban Pln & Community Dev'l |                 | 17                  |                  |                     | 17                 |
| 926 Administration of Economic Programs           | 10              | 23                  | 31%              | 10                  | 43                 |
| 928 National Security and International Affairs   |                 |                     |                  | 407                 | 407                |
| 999 Nonclassified                                 | 0               | 3                   |                  |                     | 3                  |

1 MainStreet District.

2 Town, not including MainStreet District.

3 MainStreet District as a percentage of entire town.

4 County, not including town.

5 County total.

Source: NM Department of Labor, ES-202 (Covered Employment Statistics), 2005. Calculations by BBER, 2007.