



REGIONAL SNAPSHOT

Eastern Shore Region, Virginia



Center for Regional Development
Advancing Collaboration : Energizing Regions

Table of contents

01

Overview

02

Demography

03

Human capital

04

Labor force

05

Industry and occupation

01 overview

Eastern Shore Region, VA

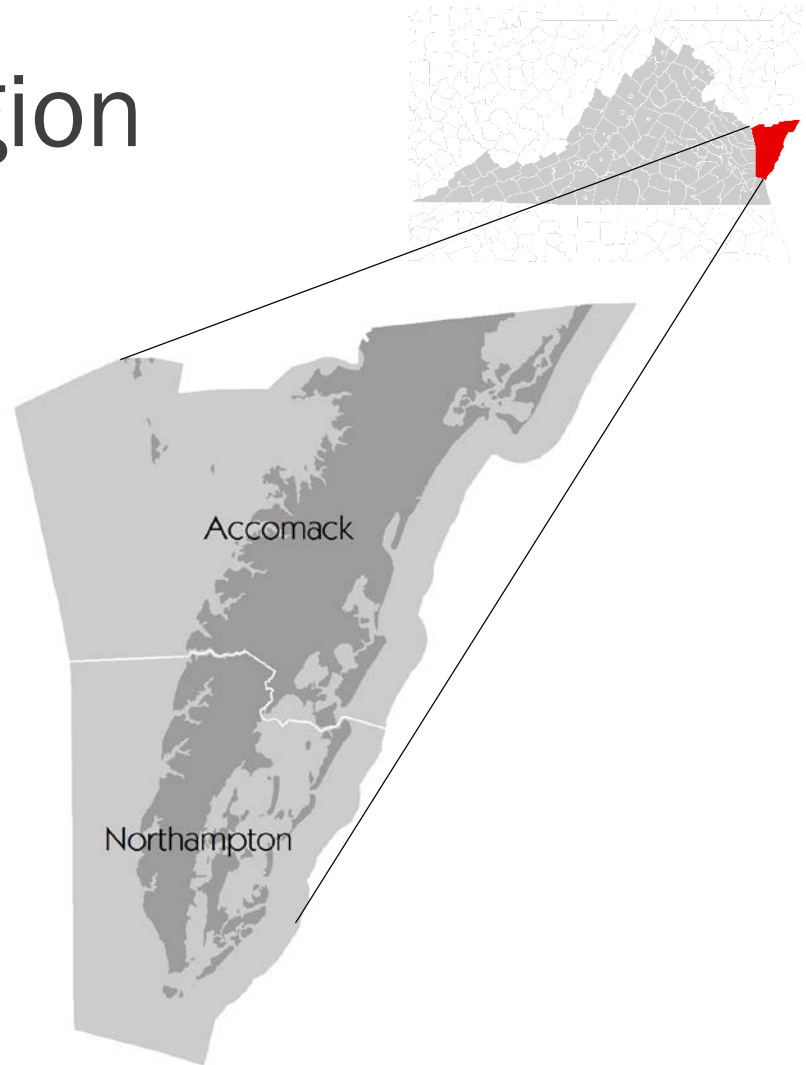
What is a regional snapshot?

Overview

Eastern Shore Region

The Eastern Shore Region is comprised of two counties in eastern Virginia. U.S. Highway 13 passes through the central part of the region connecting to Maryland and Delaware to the north and city of Norfolk, VA to the south.

- Accomack
- Northampton



Overview

What is a regional snapshot?

What is the snapshot?

This snapshot is a demographic and economic assessment of the Eastern Shore Region in Virginia. Using county-level data, PCRCD analyzed a number of indicators to gauge the overall economic performance of the Eastern Shore Region in comparison to the rest of the state.

What is its purpose?

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

What are its focus areas?

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

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

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

02 demography

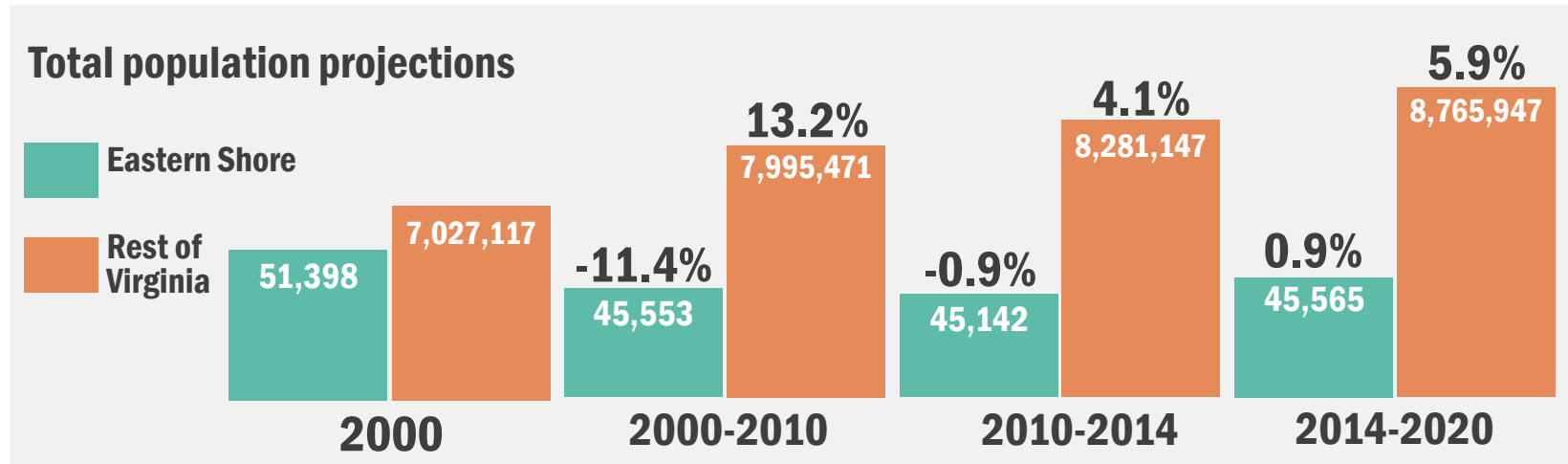
Population change

Age structure

Income and poverty

Demography

Population change

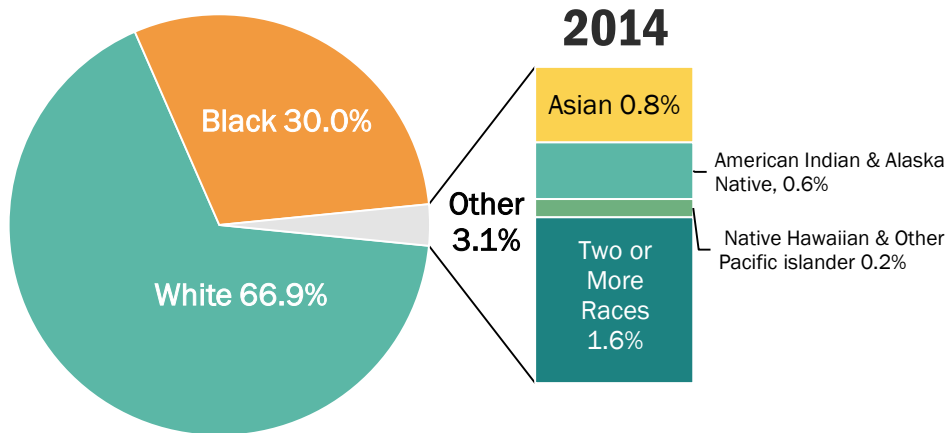
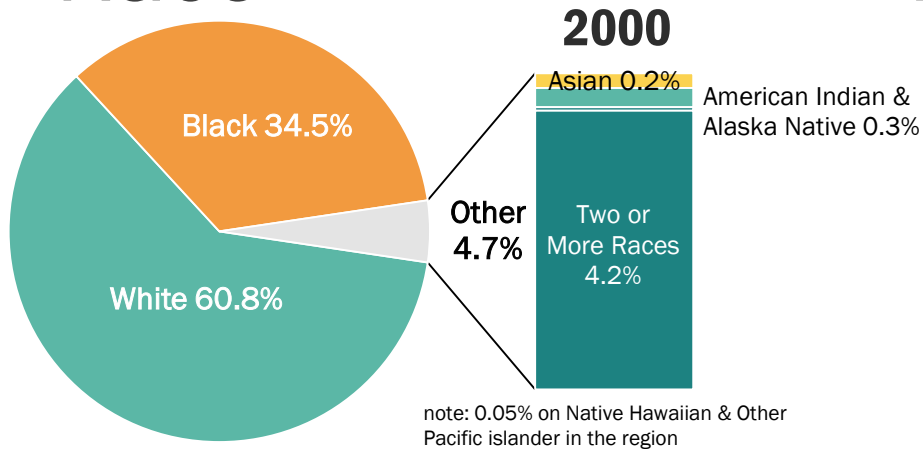


Questions:

- How does the region's population trend compare to that of the state?
- What may be some of the elements driving the trends in the region? In the state?
- What strengths or challenges might these trends present?

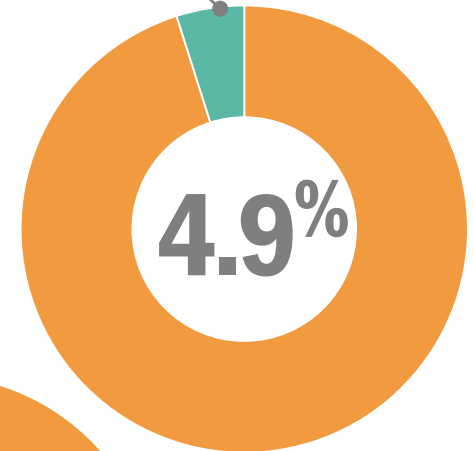
Demography

Race

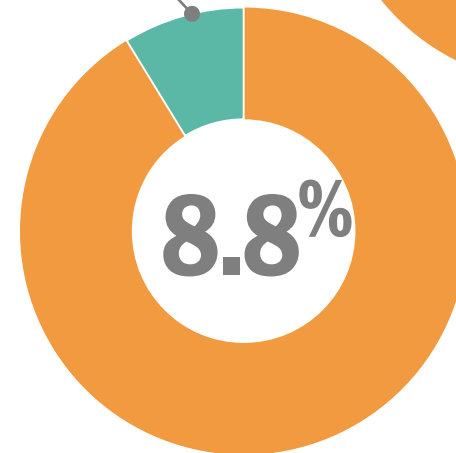


Ethnicity

Hispanics - 2000



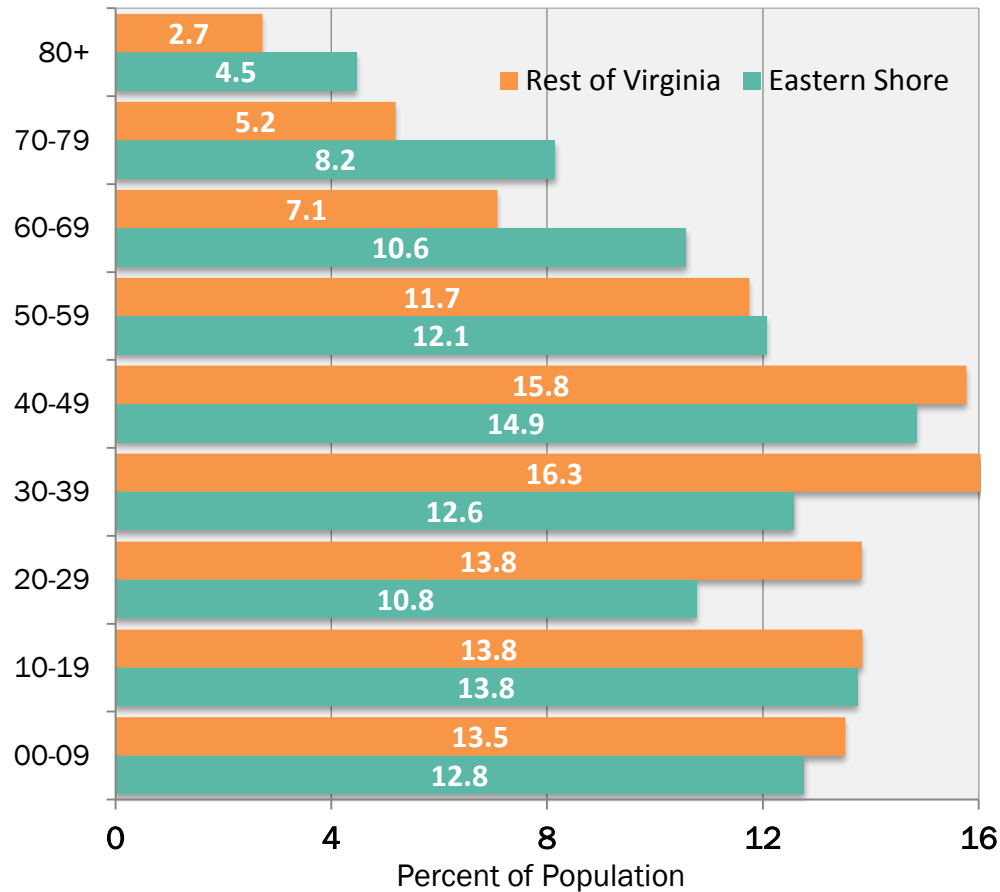
Hispanics - 2014



Demography

Population Age Structure, 2000

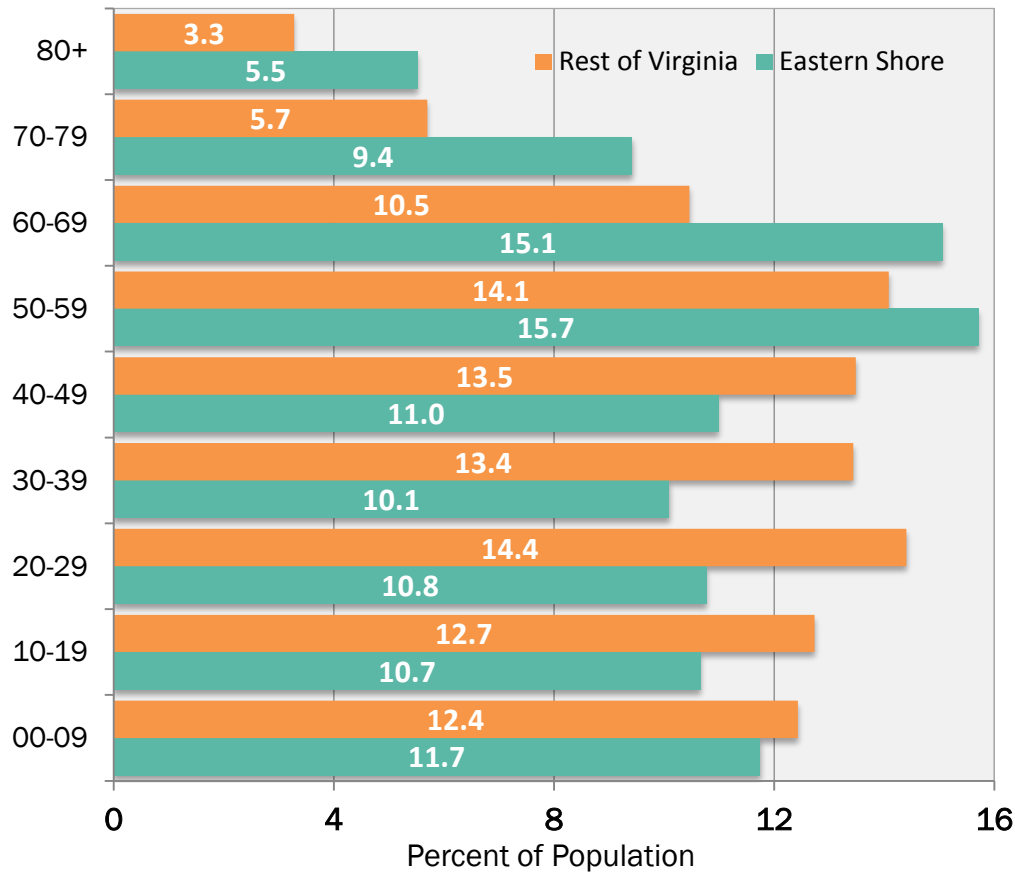
A visual presentation of the age distribution of the population (in percent)



Demography

Population Age Structure, 2014

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



Questions:

- Is the region experiencing an aging of its population? How does this compare to the rest of the state?
- Is there a sizable number of people of prime working age (20-49 years of age) in the region?
- Is the youth population (under 20 years old) growing or declining?
- What are the implications of the region's age structure for the economic development efforts of the region?

Demography

Income and poverty

	2003	2008	2013
Total Population in Poverty	16.2%	20.3%	20.1%
Minors (Age 0-17) in Poverty	25.3%	29.9%	30.7%
Real Median Household Income* (\$ 2013)	\$37,891	\$39,765	\$37,570

Questions:

- Is the poverty rate for individuals in the county getting better or worse?
- Is poverty for minors in the county lower or higher than the overall poverty rate for all individuals? Why?
- Has real median income (adjusted for inflation) improved or worsened over the 2003 to 2013 time period? What may be reasons for these changes?

section 02

* Note: Regional Median Household income is the population-weighted average of median household income values across the Eastern Shore Region counties.
Source: U.S. Census Bureau – Small Area Income and Poverty Estimates (SAIPE)

03 human capital

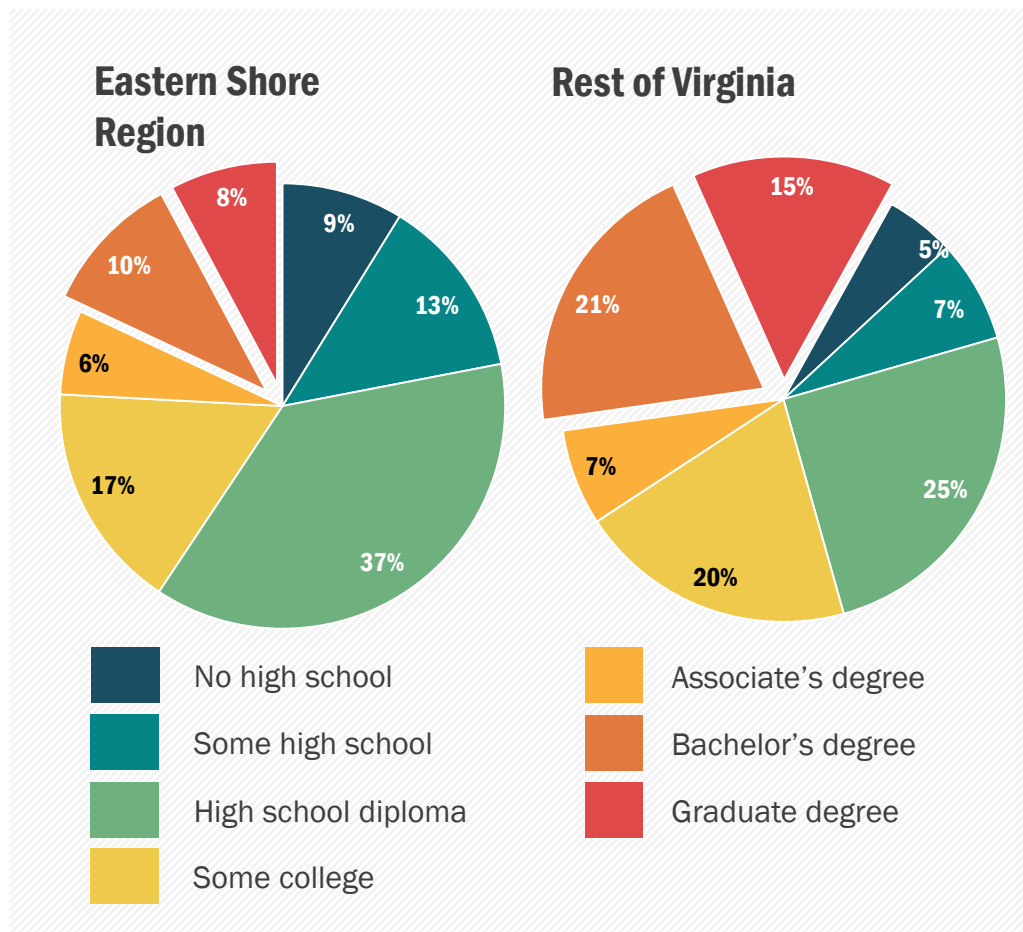
Educational attainment

Graduation rates

Patents

Human capital

Educational attainment, 2013



Questions:

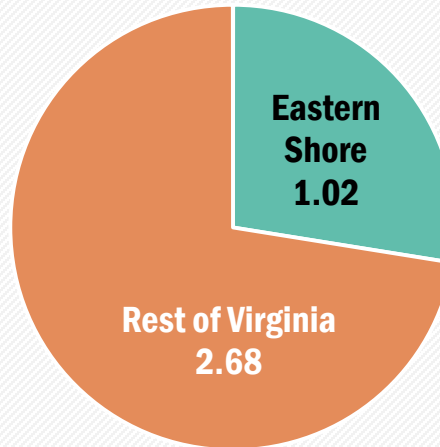
- What proportion of the adult population in the region has only a high school education?
- How many are college graduates (bachelors degree or higher)?
- How does the educational profile of the region compare to that of the rest of the state?
- What are the implications of the educational profile of the region in terms of the region's economic opportunities or workforce challenges?

Human capital

Patents

Patents per 10,000 Jobs 2001-2013

From 2001 to 2013, Eastern Shore counties were issued patents at a rate of 1.02 per 10,000 jobs, while the remaining Virginia counties garnered 2.68 patents per 10,000 jobs.

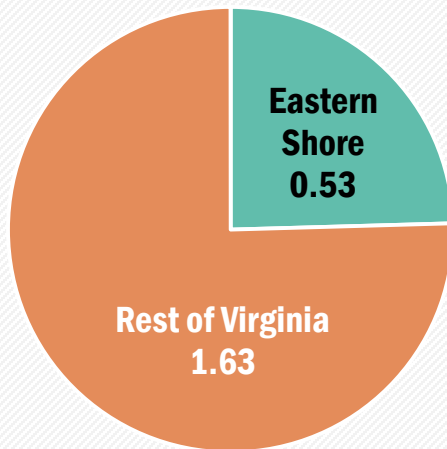


Patenting trends are an important indicator of the level of innovation in a region.

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

Questions:

- How does the region's patent rate compare to that of the rest of the state?
- How have rates changed over time?
- What might this data suggest for the future of the region?



Patents per 10,000 residents 2001-2013

From 2001 to 2013, 0.53 patents per 10,000 residents were issued in Eastern Shore counties. The Rest of Virginia amassed 1.63 patents per 10,000 residents.

04 labor force

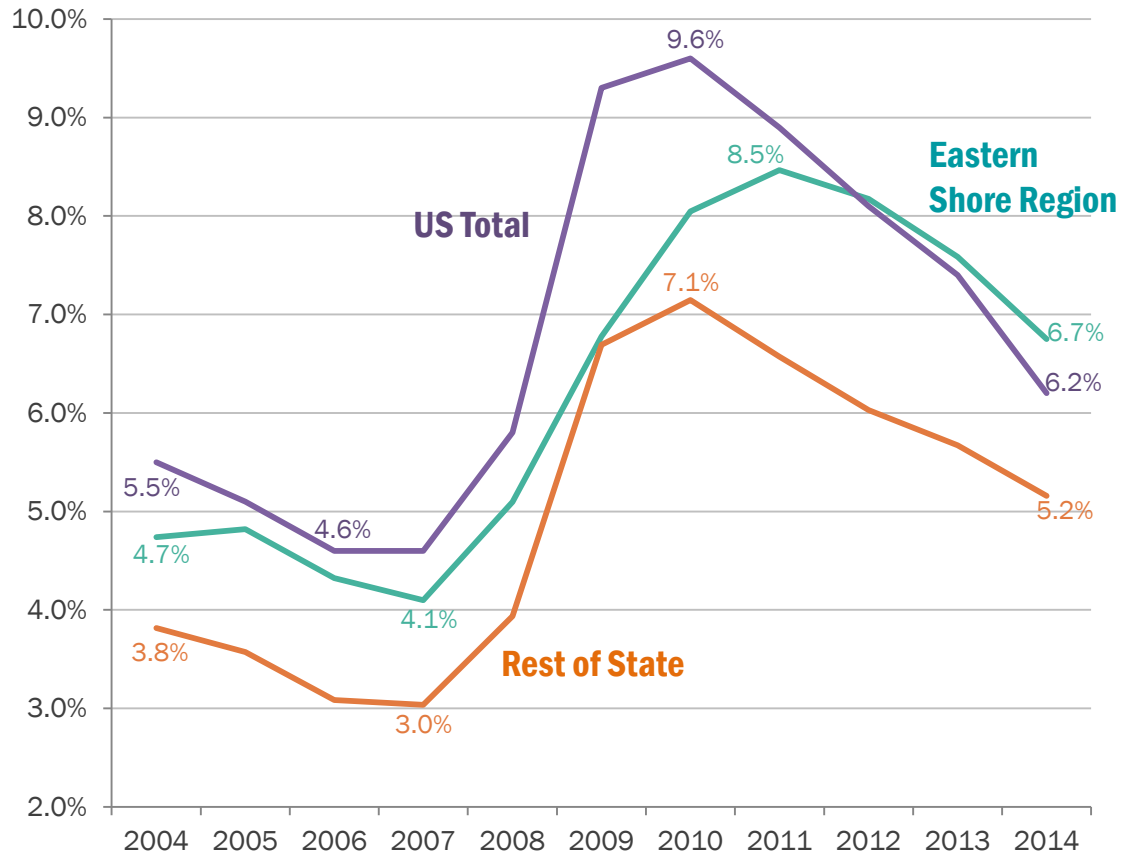
Unemployment rates

Earnings per worker

Source of labor for the region

Labor force

Unemployment rates



Questions:

- How does the region's unemployment rate compare to the rest of the state and nation?
- How does the region's unemployment peak and post-2009 recovery compare to the state and nation?
- What might this suggest for the region's economic future?

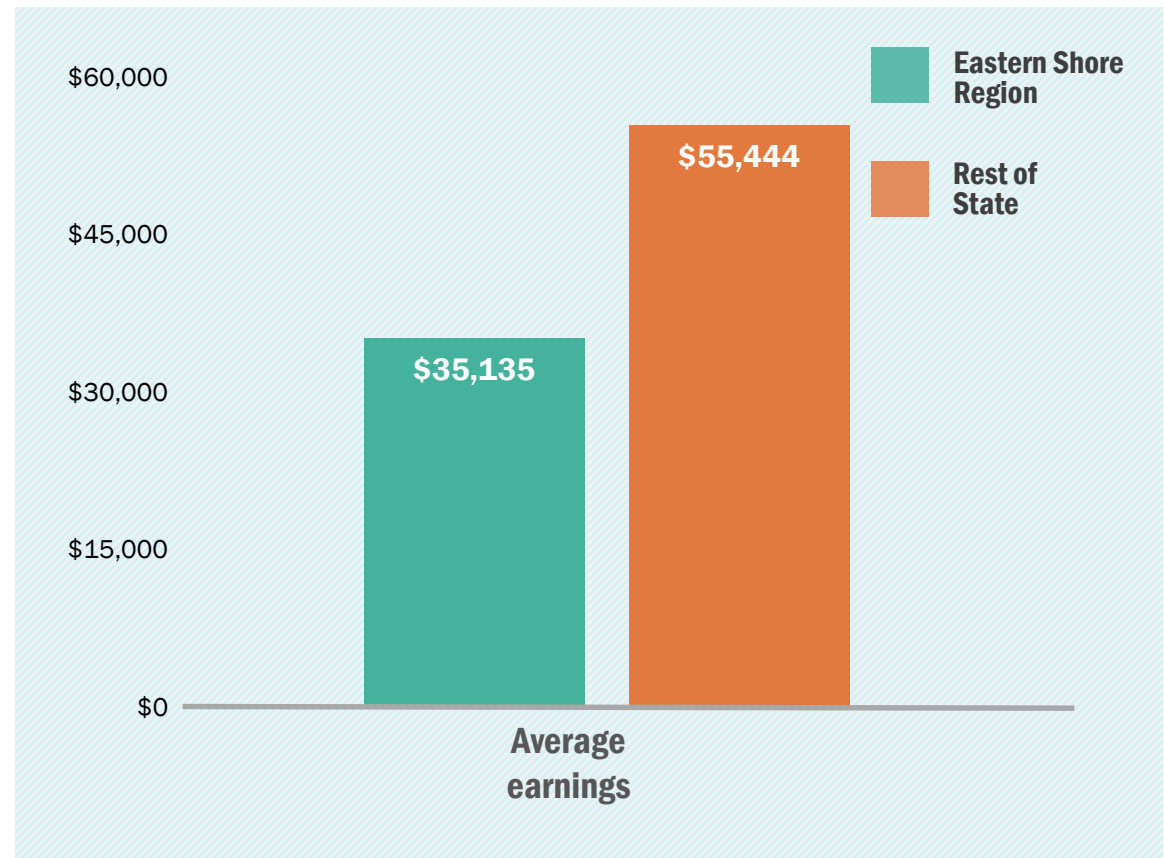
Labor force

Earnings per worker in 2014

Questions:

- How does the region's average earnings compare to that of the rest of the state?
- What might be some driving factors for the differences?
- Do these represent potential strengths or challenges for the region?

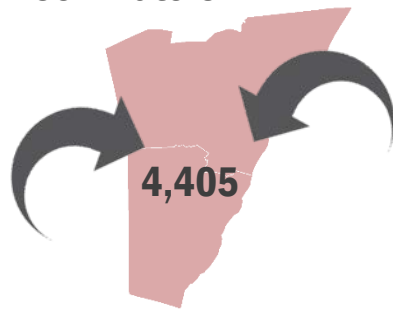
NOTE: Earnings include wages, salaries, supplements and earnings from partnerships and proprietorships



Labor force

Journey to Work

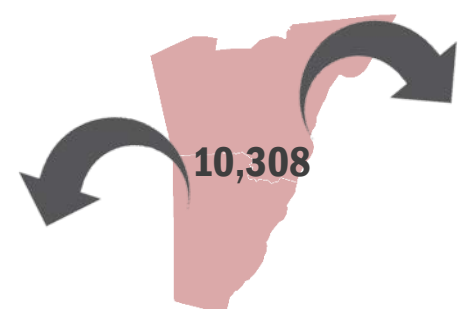
In-Commuters



Same Work/Home



Out-Commuters



Population	2013 Jobs	Proportion
Employed in Region	15,473	100.0%
Employed in Region but Living Outside	4,405	28.5%
Employed and Living in Region	11,068	71.5%

Population	2013 Jobs	Proportion
Region Residents	21,376	100.0%
Employed Outside Region but Living in Region	10,308	48.2%
Employed and Living in Region	11,068	51.8%

Questions:

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

05 industry and occupation

Establishments

Employment by industry

Cluster analysis

Top occupations

STEM occupations

Industry and occupation

Establishments

Components of Change for Establishments 2000-2011

Establishments Launched	4,338
Establishments Closed	2,937
Net Change	1,401
Net Migration (Establishments moving into minus Establishments moving out of the region)	75
Total Change	1,476
Percent Change	62.5%

An establishment is a physical business location.

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



Definition of Company Stages



Industry and occupation

Establishments

Number of Establishments by Company Stages

Stage	2000		2011	
	Establishments	Proportion	Establishments	Proportion
Stage 0	599	25.4%	1,159	30.2%
Stage 1	1,362	57.7%	2,294	59.8%
Stage 2	373	15.8%	362	9.4%
Stage 3	22	0.9%	20	0.5%
Stage 4	5	0.2%	2	0.1%
Total	2,361	100%	3,837	100.00%

Questions:

- What stage businesses have shaped the region's economic growth in the last 10 years?
- Which ones are growing or declining the most?
- Which stage of establishments are likely to shape the region's future economic growth?

Industry and occupation

Establishments

Number of Jobs by Company Stages

Year	2000	2011	% Change
Stage 0	599	1,159	93.5%
Stage 1	4,888	6,871	40.6%
Stage 2	8,764	9,114	4.0%
Stage 3	3,567	3,627	1.7%
Stage 4	4,917	1,667	-66.1%
Total	22,735	22,438	-1.3%

Sales (\$ 2012) by Company Stages

Year	2000	2011	% Change
Stage 0	\$64,450,521	\$78,279,741	21.5%
Stage 1	\$612,414,629	\$527,518,023	-13.9%
Stage 2	\$968,479,026	\$790,836,525	-18.3%
Stage 3	\$336,293,243	\$379,581,722	12.9%
Stage 4	\$429,990,498	\$211,889,449	-50.7%
Total	\$2,411,627,917	\$1,988,105,460	-17.6%

Questions:

- What establishments are the most numerous based on company stages?
- What stages have experienced the largest growth? The greatest decline?
- What company stage employs the largest number of people?
- What stage captures the most sales?
- Which ones have experienced the greatest percentage loss over the 2000-11 period?

Industry and occupation

Top ten industry sector employment growth

NAICS	Description	2009 Jobs	2014 Jobs	Change	Change (%)	State Change (%)
61	Educational Services	135	201	66	49%	13%
21	Mining, Quarrying, and Oil and Gas Extraction	86	110	24	28%	-4%
71	Arts, Entertainment, and Recreation	344	430	86	25%	13%
53	Real Estate and Rental and Leasing	965	1,119	154	16%	15%
52	Finance and Insurance	516	582	66	13%	14%
54	Professional, Scientific, and Technical Services	1,140	1,255	115	10%	2%
44	Retail Trade	2,200	2,417	217	10%	4%
81	Other Services (except Public Administration)	1,131	1,215	84	7%	9%
51	Information	138	148	10	7%	-10%
48	Transportation and Warehousing	314	336	22	7%	5%

Questions:

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

Industry and occupation

Top ten industry sector employment decline

NAICS	Description	2009 Jobs	2014 Jobs	Change	Change (%)	State Change (%)
23	Construction	1,455	1,031	-424	-29%	-7%
11	Crop and Animal Production	3,712	2,666	-1046	-28%	-2%
56	Administrative and Support and Waste Management and Remediation Services	1,077	900	-177	-16%	9%
42	Wholesale Trade	382	330	-52	-14%	-1%
31	Manufacturing	4,027	3,496	-531	-13%	-2%
22	Utilities	101	89	-12	-12%	-7%
55	Management of Companies and Enterprises	119	113	-6	-5%	2%
62	Health Care and Social Assistance	2,536	2,459	-77	-3%	11%
90	Government	4,066	4,209	143	4%	0%
72	Accommodation and Food Services	1,688	1,773	85	5%	9%

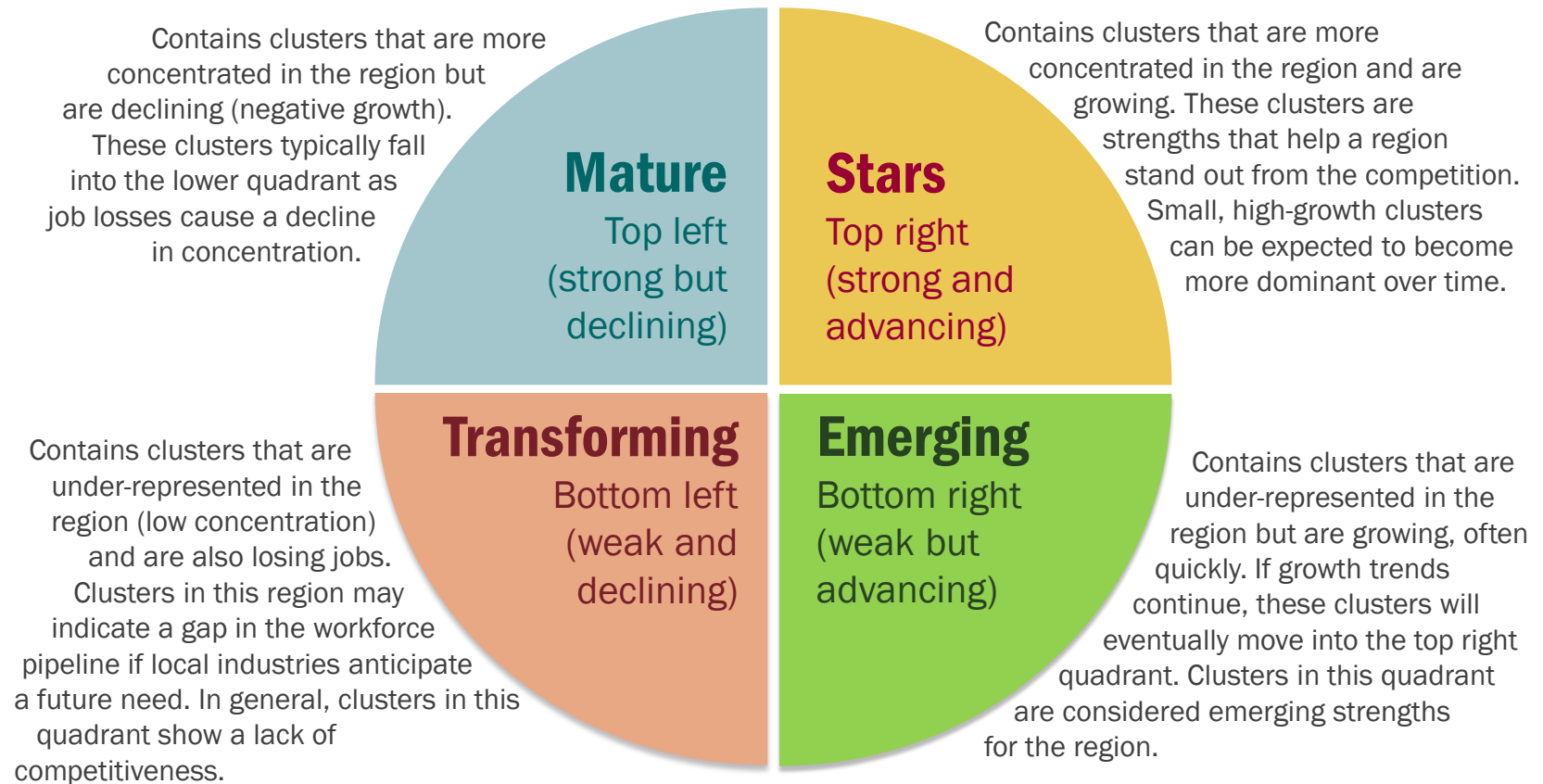
Questions:

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

Industry cluster analysis

How to interpret cluster data results

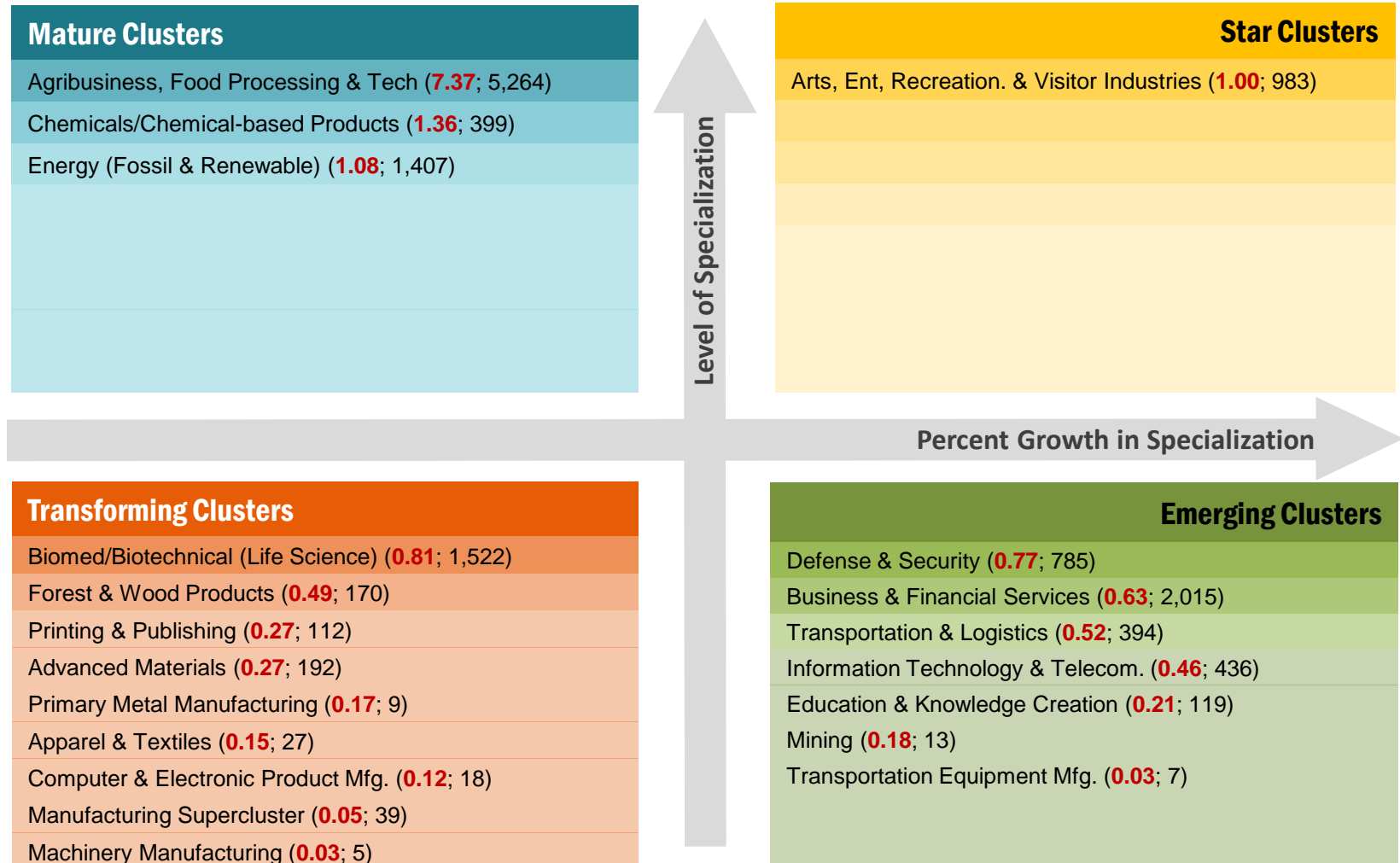
The graph's four quadrants tell a different story for each cluster.



Distribution of clusters in the Region by quadrants



Industry cluster analysis



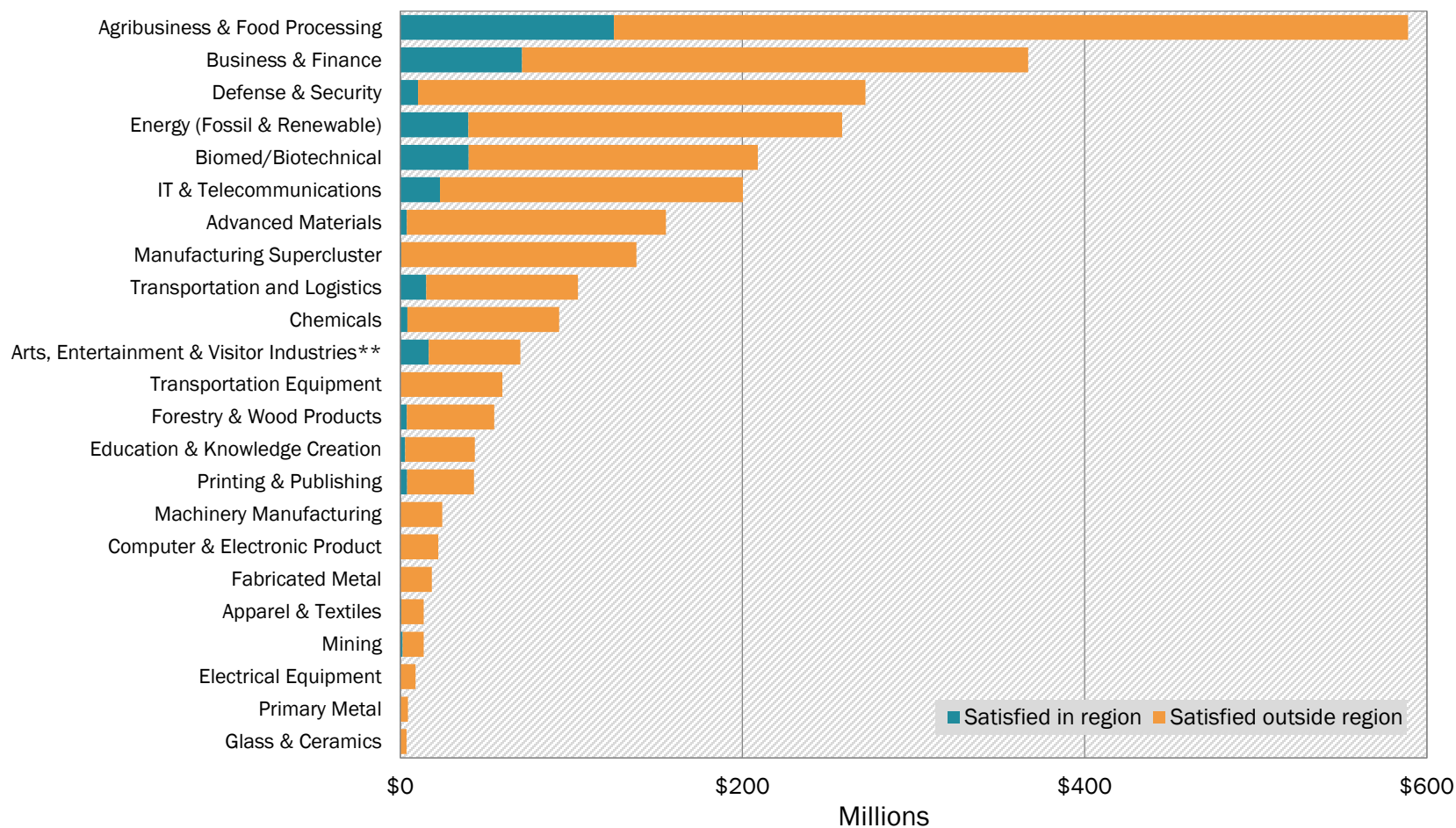
Note: Manufacturing Supercluster, Machinery Manufacturing, Primary Metal Manufacturing, Computer & Electronic Product Manufacturing, Transportation Equipment Manufacturing sub-clusters as well as Apparel & Textiles and Mining clusters have too few jobs. Glass & Ceramics, Fabricated Metal Product Manufacturing and Electrical Equipment, Appliance & Component Manufacturing sub-cluster do not exist in the region.

section 02

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

Industry Clusters: Leakages

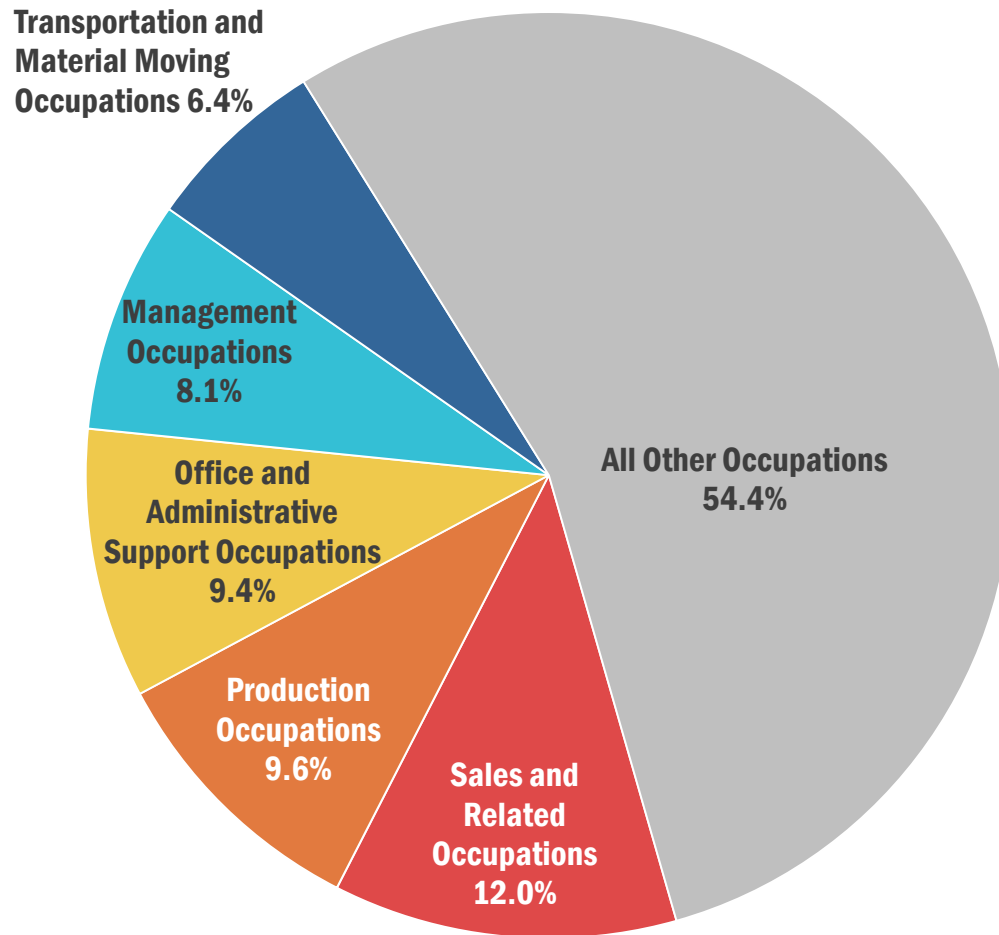
Regional requirements, 2013



Note: ** shows Star clusters

Industry and occupation

Top five occupations in 2014

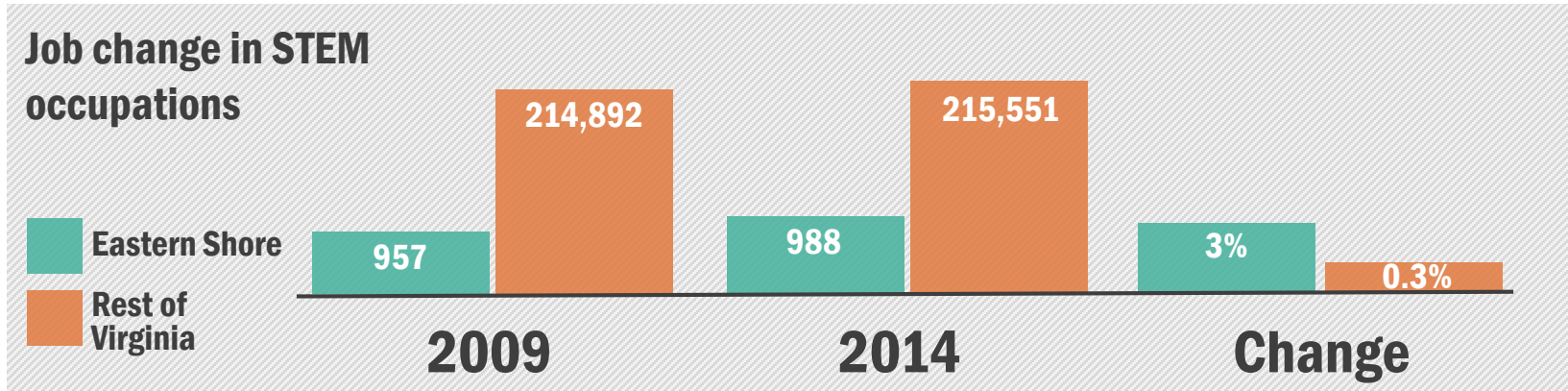


Questions:

- What are the education and skill requirements for these occupations?
- Do the emerging and star clusters align with the top occupations?
- What type salaries do these occupations typically provide?

Industry and occupation

Science, Technology, Engineering & Math



Questions:

- How do STEM jobs compare to the state?
- What has been the trend of STEM jobs over time?
- How important are STEM jobs to the region's Star and Emerging clusters?

Report Contributors

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



Report Authors

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



Data Analysis

Ayoung Kim
Francisco Scott



Report Design

Tyler Wright

This report was supported, in part, by grant from the USDA Rural Development through the auspices of the Southern Rural Development Center. It was produced in support of the Stronger Economies Together (SET) program.

PURDUE
UNIVERSITY



Center for Regional Development
Advancing Collaboration : Energizing Regions

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

For more information,
please contact:

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

Or

765-494-7273

September 2015