



Target Industry Cluster Analysis

Eastern Shore Region, Virginia

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01 overview

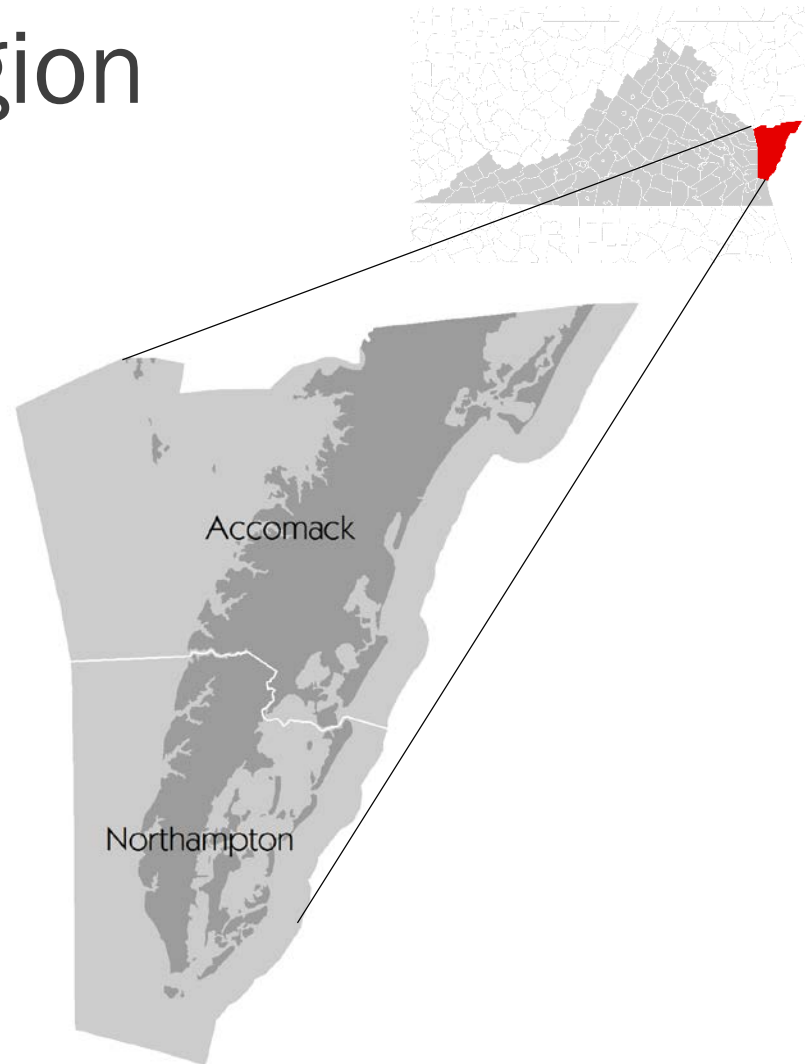
Eastern Shore Region, VA

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



02 target industry cluster

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

**Agribusiness, Food
Processing and Technology
Information Technology and
Telecommunications**

**Business and Financial
Services**

Defense and Security

Shift-Share Analysis by Top Industry Sectors: Eastern Shore Region, VA

Arts, Entertainment, Recreation And Visitor Industries Cluster

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Cumulative Expected Growth	Actual Job Growth, 2009-2014	Regional Performance, 2009-2014
		A	B	C=A+B	D	D-C
Hotels (except Casino Hotels) and Motels	299	24	1	25	-19	-44
Independent Artists, Writers, and Performers	146	10	5	15	9	-6
Golf Courses and Country Clubs	115	0	0	0	110	↑ 110
RV (Recreational Vehicle) Parks and Campgrounds	87	10	12	22	-51	-73
Marinas	75	5	6	11	5	-6
Bed-and-Breakfast Inns	53	4	2	6	5	0
Fitness and Recreational Sports Centers	34	4	2	6	-15	-21
All Other Amusement and Recreation Industries	34	4	11	15	-26	-41
Radio Stations	24	2	-1	1	3	↑ 2
All Other Traveler Accommodation	22	1	2	3	10	↑ 7
Scenic and Sightseeing Transportation, Water	21	2	-2	0	-11	-11
Motion Picture Theaters (except Drive-Ins)	15	2	-5	-3	-10	-7
Casino Hotels	15	0	0	0	15	↑ 15

Note: Upward arrow (↑) indicates regional competitiveness. EMSI does not include detailed sectors for Racetracks; and Sports Teams and Clubs.

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Top 15 Inputs by Dollars: Eastern Shore Region, VA

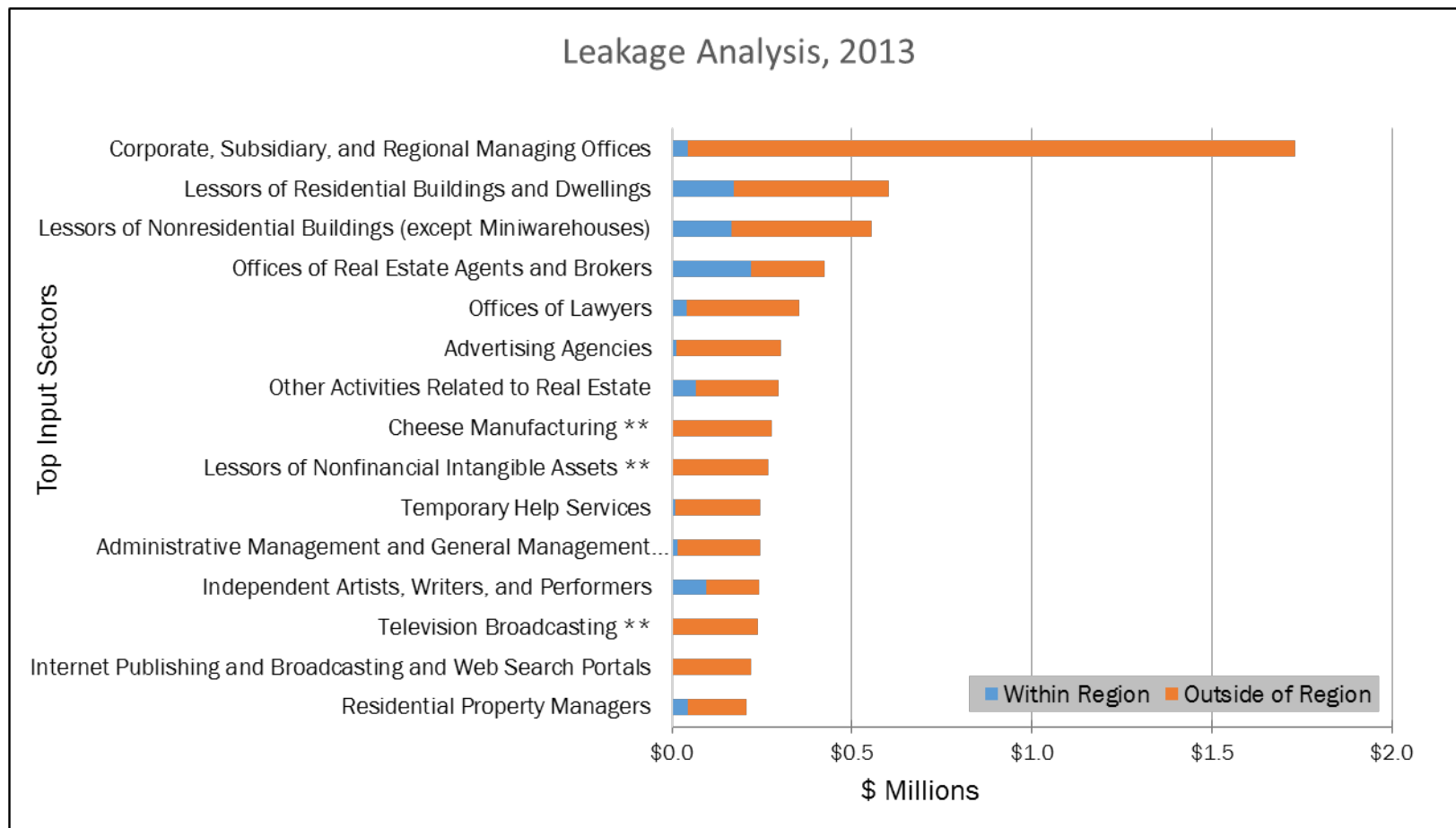
Arts, Entertainment, Recreation And Visitor Industries Cluster

Industries	Estimated Input (\$ Millions), 2013	% In-Region	% Out of Region
Corporate, Subsidiary, and Regional Managing Offices	\$1.73	2%	98%
Lessors of Residential Buildings and Dwellings	\$0.60	28%	72%
Lessors of Nonresidential Buildings (except Miniwarehouses)	\$0.55	30%	70%
Offices of Real Estate Agents and Brokers	\$0.43	52%	48%
Offices of Lawyers	\$0.35	12%	88%
Advertising Agencies *	\$0.30	4%	96%
Other Activities Related to Real Estate	\$0.30	23%	77%
Cheese Manufacturing **	\$0.28	0%	100%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works) **	\$0.27	0%	100%
Temporary Help Services	\$0.25	3%	97%
Administrative Management and General Management Consulting Services	\$0.24	7%	93%
Independent Artists, Writers, and Performers	\$0.24	39%	61%
Television Broadcasting **	\$0.24	0%	100%
Internet Publishing and Broadcasting and Web Search Portals *	\$0.22	1%	99%
Residential Property Managers	\$0.21	21%	79%

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

Top 15 Inputs by Dollars: Eastern Shore Region, VA

Arts, Entertainment, Recreation And Visitor Industries Cluster



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

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Top Occupations: Eastern Shore Region, VA

Arts, Entertainment, Recreation And Visitor Industries Cluster

Occupations	Jobs 2014	% Change, 2009-2014	Median Hourly Earnings, 2014	Entry Level Education
Maids and Housekeeping Cleaners	118	-4%	\$7.6	Less than high school
Landscaping and Groundskeeping Workers	47	24%	\$10.0	Less than high school
Hotel, Motel, and Resort Desk Clerks	47	-10%	\$8.4	High school diploma or equivalent
Recreation Workers	45	-8%	\$8.3	Bachelor's degree
Waiters and Waitresses	40	18%	\$8.3	Less than high school
Musicians and Singers	38	19%	\$12.7	High school diploma or equivalent
Lodging Managers	35	21%	\$11.2	High school diploma or equivalent
Maintenance and Repair Workers, General	35	-13%	\$13.1	High school diploma or equivalent
Writers and Authors	29	4%	\$13.2	Bachelor's degree
Cooks, Restaurant	20	18%	\$10.3	Less than high school
Janitors and Cleaners, Except Maids and Housekeeping Cleaners	19	6%	\$9.1	Less than high school
Cashiers	19	-5%	\$8.4	Less than high school
Office Clerks, General	16	-11%	\$11.0	High school diploma or equivalent
Motorboat Mechanics and Service Technicians	15	114%	\$15.6	High school diploma or equivalent
Bookkeeping, Accounting, and Auditing Clerks	13	8%	\$13.3	High school diploma or equivalent

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

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Shift-Share Analysis by Top Industry Sectors: Eastern Shore Region, VA

Agribusiness, Food Processing and Technology Cluster

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Cumulative Expected Growth	Actual Job Growth, 2009-2014	Regional Performance, 2009-2014
		A	B	C=A+B	D	D-C
Poultry Processing	2,916	243	-354	-111	-291	-180
Crop Production	1,369	185	-166	19	-1,070	-1,089
Animal Production	506	33	-43	-10	66	↑ 76
Postharvest Crop Activities (except Cotton Ginning)	141	10	1	11	12	↑ 1
Farm Labor Contractors and Crew Leaders	126	9	8	17	7	-10
Soil Preparation, Planting, and Cultivating	65	5	9	14	-7	-21
Farm Supplies Merchant Wholesalers	47	4	0	4	-10	-14
Farm Management Services	41	1	1	2	35	↑ 33
Farm and Garden Machinery and Equipment Merchant Wholesalers	14	4	0	4	-35	-39
Grain and Field Bean Merchant Wholesalers	11	1	0	1	2	↑ 1

Note: Upward arrow (↑) indicates regional competitiveness. EMSI shows insufficient data for Fruit and Vegetable Canning; Other Farm Product Raw Material Merchant Wholesalers; Retail Bakeries; Wineries; and Fertilizer (Mixing Only) Manufacturing.

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Top 15 Inputs by Dollars: Eastern Shore Region, VA

Agribusiness, Food Processing and Technology Cluster

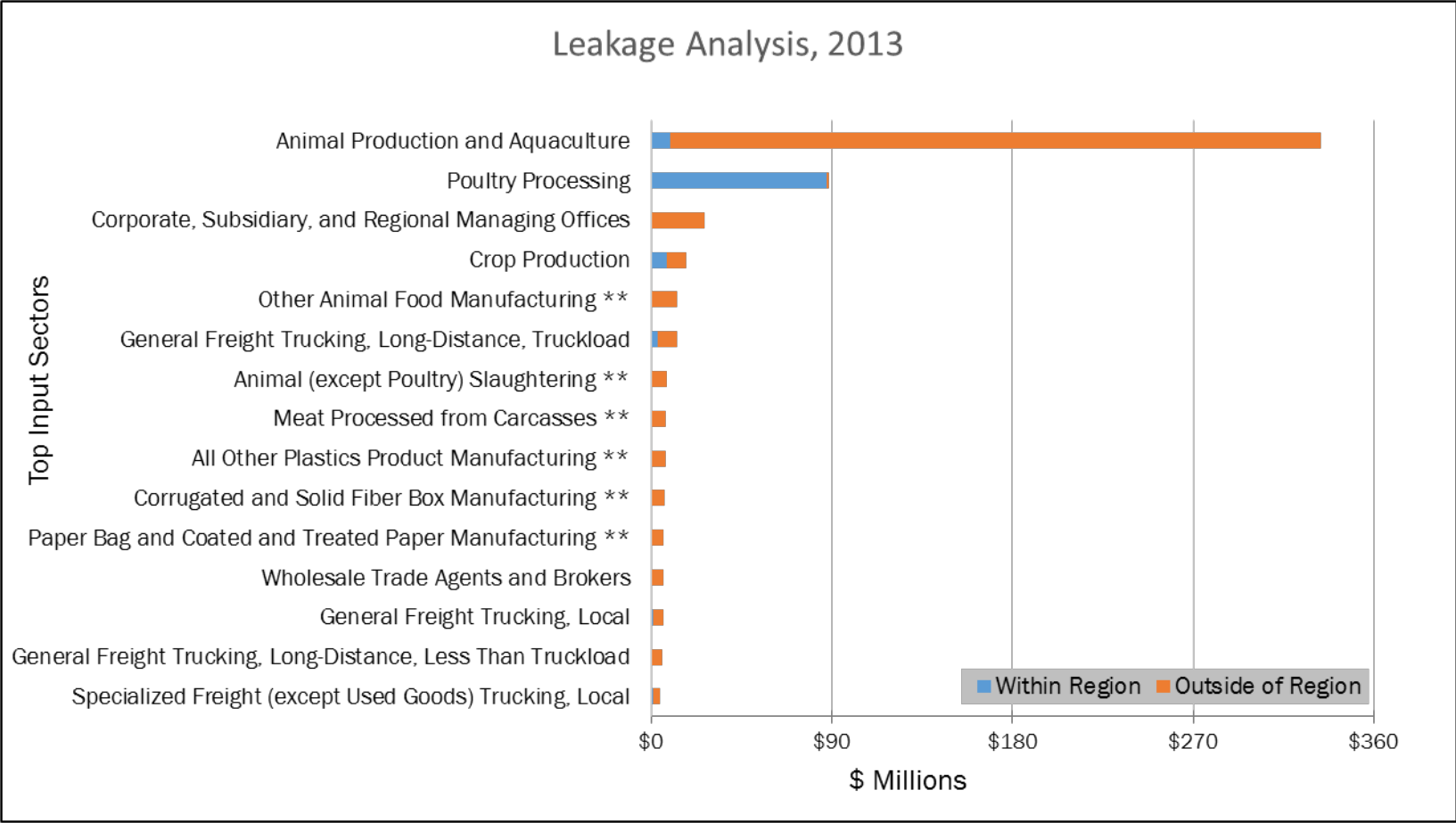
Industries	Estimated Input (\$ Millions), 2013	% In-Region	% Out of Region
Animal Production and Aquaculture	\$333.78	3%	97%
Poultry Processing	\$88.89	99%	1%
Corporate, Subsidiary, and Regional Managing Offices	\$26.84	2%	98%
Crop Production	\$17.37	46%	54%
Other Animal Food Manufacturing **	\$13.07	0%	100%
General Freight Trucking, Long-Distance, Truckload	\$13.04	24%	76%
Animal (except Poultry) Slaughtering **	\$8.17	0%	100%
Meat Processed from Carcasses **	\$7.36	0%	100%
All Other Plastics Product Manufacturing **	\$7.09	0%	100%
Corrugated and Solid Fiber Box Manufacturing **	\$6.79	0%	100%
Paper Bag and Coated and Treated Paper Manufacturing **	\$6.40	0%	100%
Wholesale Trade Agents and Brokers *	\$6.28	4%	96%
General Freight Trucking, Local	\$6.05	15%	85%
General Freight Trucking, Long-Distance, Less Than Truckload *	\$5.52	3%	97%
Specialized Freight (except Used Goods) Trucking, Local	\$4.50	22%	78%

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

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Top 15 Inputs by Dollars: Eastern Shore Region, VA

Agribusiness, Food Processing and Technology Cluster



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

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

Top Occupations: Eastern Shore Region, VA

Agribusiness, Food Processing and Technology Cluster

Occupations	Jobs 2014	% Change, 2009-2014	Median Hourly Earnings, 2014	Entry Level Education
Meat, Poultry, and Fish Cutters and Trimmers	956	-8%	\$9.3	Less than high school
Farmers, Ranchers, and Other Agricultural Managers	860	-36%	\$10.4	High school diploma or equivalent
Farmworkers and Laborers, Crop, Nursery, and Greenhouse	720	-27%	\$9.0	Less than high school
Packers and Packagers, Hand	251	-8%	\$10.0	Less than high school
Laborers and Freight, Stock, and Material Movers, Hand	175	-9%	\$10.0	Less than high school
Slaughterers and Meat Packers	112	-25%	\$8.2	Less than high school
Food Processing Workers, All Other	101	-8%	\$7.8	Less than high school
Maintenance and Repair Workers, General	95	-10%	\$13.1	High school diploma or equivalent
Helpers--Production Workers	92	-10%	\$10.3	Less than high school
First-Line Supervisors of Production and Operating Workers	90	-9%	\$20.9	Postsecondary non-degree award
Farmworkers, Farm, Ranch, and Aquacultural Animals	87	-26%	\$11.1	Less than high school
Packaging and Filling Machine Operators and Tenders	84	-10%	\$8.3	High school diploma or equivalent
Heavy and Tractor-Trailer Truck Drivers	76	-15%	\$16.5	Postsecondary non-degree award
Inspectors, Testers, Sorters, Samplers, and Weighers	71	-1%	\$11.7	High school diploma or equivalent
Butchers and Meat Cutters	71	-8%	\$16.4	Less than high school

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

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Shift-Share Analysis by Top Industry Sectors: Eastern Shore Region, VA

Information Technology and Telecommunications

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Cumulative Expected Growth	Actual Job Growth, 2009-2014	Regional Performance, 2009-2014
		A	B	C=A+B	D	D-C
Computer Systems Design Services	228	12	18	30	72	↑ 42
Research and Development in the Physical, Engineering, and Life Sciences (except Biotechnology)	64	1	0	1	53	↑ 52
Electrical Contractors and Other Wiring Installation Contractors	49	4	-3	1	-9	-10
Wired Telecommunications Carriers	48	4	-4	0	-3	-3
Custom Computer Programming Services	10	2	4	6	-15	-21
Data Processing, Hosting, and Related Services	10	0	0	0	3	↑ 3

Note: Upward arrow (↑) indicates regional competitiveness. EMSI does not show sufficient data for Other Management Consulting Services; Satellite Telecommunications; Software Publishers; Other Electronic Parts and Equipment Merchant Wholesalers; Semiconductor and Related Device Manufacturing; Computer Terminal and Other Computer Peripheral Equipment Manufacturing; Other Computer Related Services; Computer Facilities Management Services; and Other Industrial Machinery Manufacturing.

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Top 15 Inputs by Dollars: Eastern Shore Region, VA

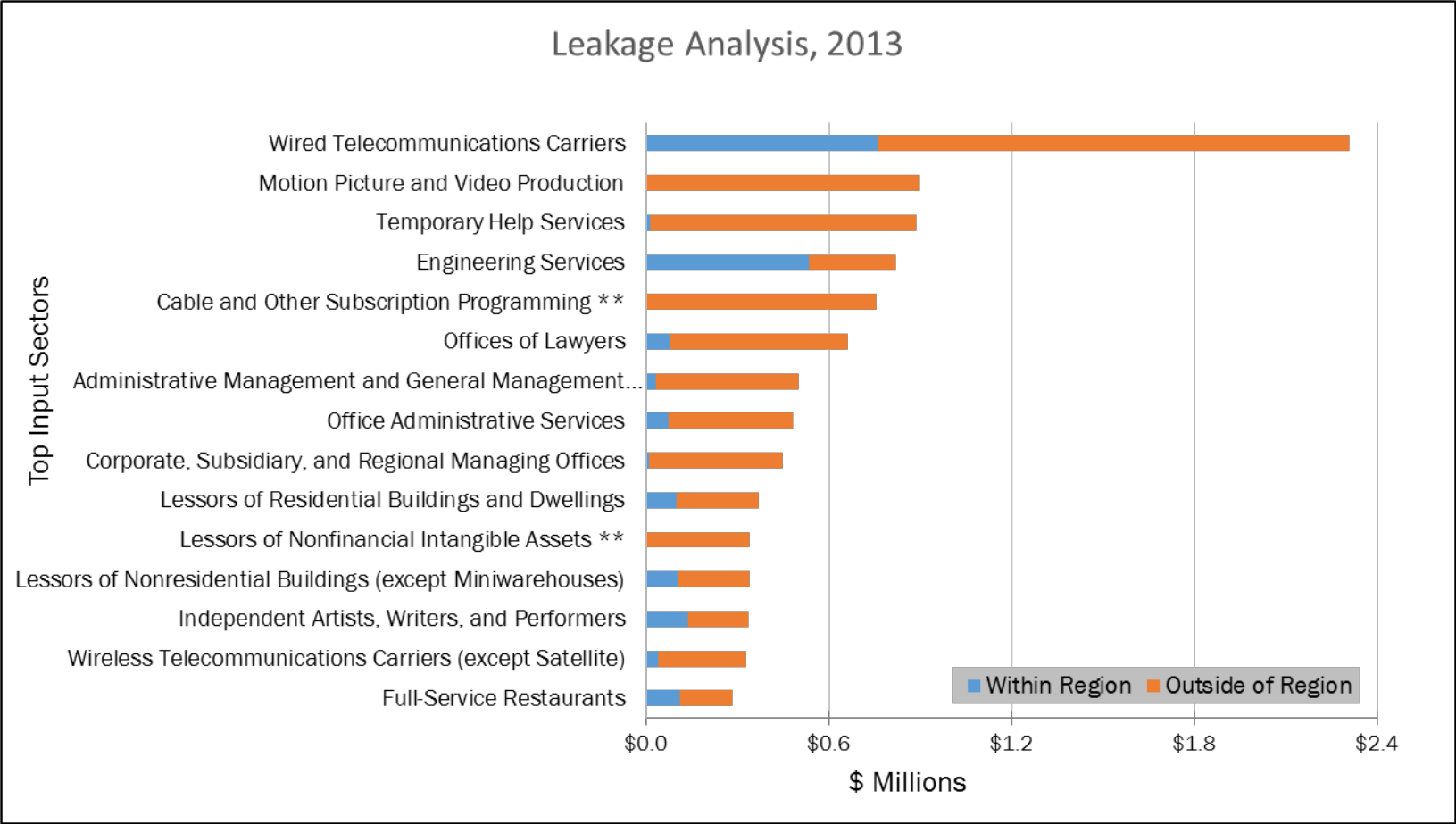
Information Technology and Telecommunications

Industries	Estimated Input (\$ Millions), 2013	% In-Region	% Out of Region
Wired Telecommunications Carriers	\$2.31	33%	67%
Motion Picture and Video Production *	\$0.90	0%	100%
Temporary Help Services	\$0.89	2%	98%
Engineering Services	\$0.82	65%	35%
Cable and Other Subscription Programming **	\$0.76	0%	100%
Offices of Lawyers	\$0.66	12%	88%
Administrative Management and General Management Consulting Services	\$0.50	7%	93%
Office Administrative Services	\$0.48	15%	85%
Corporate, Subsidiary, and Regional Managing Offices	\$0.45	2%	98%
Lessors of Residential Buildings and Dwellings	\$0.37	27%	73%
Lessors of Nonfinancial Intangible Assets (except Copyrighted Works) **	\$0.34	0%	100%
Lessors of Nonresidential Buildings (except Miniwarehouses)	\$0.34	31%	69%
Independent Artists, Writers, and Performers	\$0.34	41%	59%
Wireless Telecommunications Carriers (except Satellite) *	\$0.33	12%	88%
Full-Service Restaurants	\$0.28	39%	61%

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

Top 15 Inputs by Dollars: Eastern Shore Region, VA

Information Technology and Telecommunications



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

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

Top Occupations: Eastern Shore Region, VA

Information Technology and Telecommunications

Occupations	Jobs 2014	% Change, 2009-2014	Median Hourly Earnings, 2014	Entry Level Education
Software Developers, Applications	34	31%	\$41.7	Bachelor's degree
Software Developers, Systems Software	28	27%	\$46.6	Bachelor's degree
Computer User Support Specialists	25	39%	\$16.5	Some college, no degree
Computer and Information Research Scientists	18	80%	\$46.9	Doctoral or professional degree
Computer Systems Analysts	15	15%	\$36.0	Bachelor's degree
Electronics Engineers, Except Computer	12	-8%	\$49.6	Bachelor's degree
Network and Computer Systems Administrators	11	22%	\$29.3	Bachelor's degree

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014. EMSI does not show sufficient data for Stock Clerks and Order Fillers; Industrial Engineers; Shipping, Receiving, and Traffic Clerks; Computer Hardware Engineers; Electrical Engineers; Executive Secretaries and Executive Administrative Assistants; and Secretaries and Administrative Assistants, Except Legal, Medical, and Executive.

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Shift-Share Analysis by Top Industry Sectors: Eastern Shore Region, VA

Business and Financial Services

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Cumulative Expected Growth	Actual Job Growth, 2009-2014	Regional Performance, 2009-2014
		A	B	C=A+B	D	D-C
Engineering Services	326	28	-7	21	-38	-59
Computer Systems Design Services	228	12	18	30	72	↑ 42
Other Activities Related to Real Estate	200	14	13	27	21	-6
Insurance Agencies and Brokerages	119	9	12	21	-1	-22
Process, Physical Distribution, and Logistics Consulting Services	99	0	0	0	97	↑ 97
Portfolio Management	99	4	33	37	40	↑ 3
Lessors of Miniwarehouses and Self-Storage Units	92	5	18	23	20	-3
Lessors of Nonresidential Buildings (except Miniwarehouses)	88	6	17	23	12	-11
Investment Advice	75	6	-1	5	-3	-8
Residential Property Managers	66	5	11	16	0	-16
Offices of Lawyers	66	6	-5	1	-14	-15
Administrative Management and General Management Consulting Services	43	4	5	9	-11	-20
Lessors of Other Real Estate Property	40	2	2	4	15	↑ 11
Other Accounting Services	37	2	-1	1	12	↑ 11
Nonresidential Property Managers	35	1	1	2	22	↑ 20

Note: Upward arrow (↑) indicates regional competitiveness.

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Top 15 Inputs by Dollars: Eastern Shore Region, VA

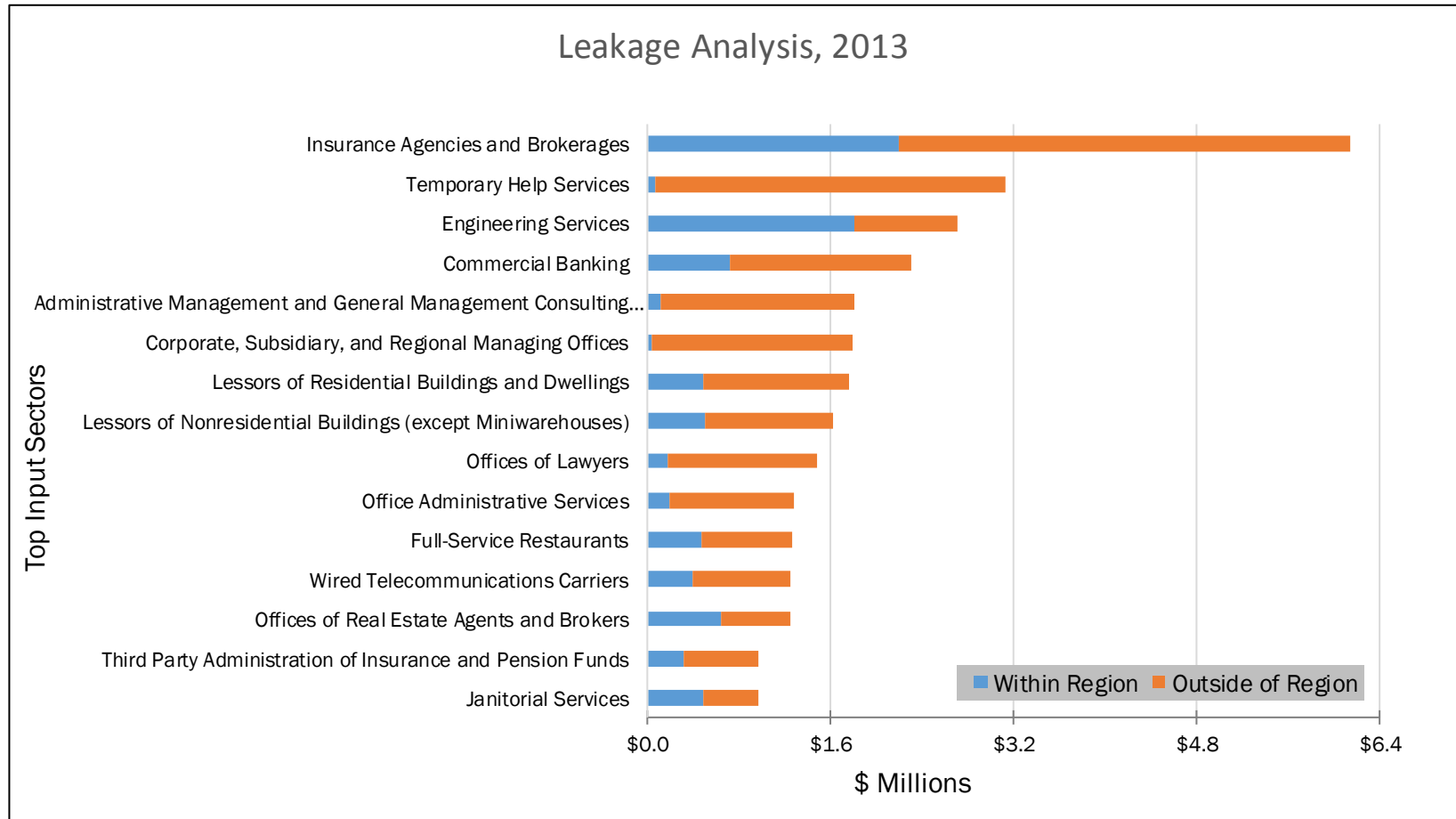
Business and Financial Services

Industries	Estimated Input (\$ Millions), 2013	% In-Region	% Out of Region
Insurance Agencies and Brokerages	\$6.15	36%	64%
Temporary Help Services	\$3.13	2%	98%
Engineering Services	\$2.71	67%	33%
Commercial Banking	\$2.30	31%	69%
Administrative Management and General Management Consulting Services	\$1.82	7%	93%
Corporate, Subsidiary, and Regional Managing Offices	\$1.80	2%	98%
Lessors of Residential Buildings and Dwellings	\$1.77	27%	73%
Lessors of Nonresidential Buildings (except Miniwarehouses)	\$1.62	31%	69%
Offices of Lawyers	\$1.48	12%	88%
Office Administrative Services	\$1.28	15%	85%
Full-Service Restaurants	\$1.27	38%	62%
Wired Telecommunications Carriers	\$1.25	31%	69%
Offices of Real Estate Agents and Brokers	\$1.25	52%	48%
Third Party Administration of Insurance and Pension Funds *	\$0.98	32%	68%
Janitorial Services	\$0.97	50%	50%

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Top 15 Inputs by Dollars: Eastern Shore Region, VA

Business and Financial Services



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

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Top Occupations: Eastern Shore Region, VA

Business and Financial Services

Occupations	Jobs 2014	% Change, 2009-2014	Median Hourly Earnings, 2014	Entry Level Education
Real Estate Sales Agents	270	18%	\$10.5	High school diploma or equivalent
Insurance Sales Agents	111	23%	\$22.1	High school diploma or equivalent
Personal Financial Advisors	106	47%	\$23.8	Bachelor's degree
Property, Real Estate, and Community Association Managers	85	29%	\$12.9	High school diploma or equivalent
Management Analysts	84	18%	\$36.2	Bachelor's degree
Securities, Commodities, and Financial Services Sales Agents	69	35%	\$19.5	Bachelor's degree
Accountants and Auditors	56	8%	\$22.0	Bachelor's degree
Electrical Engineers	56	0%	\$42.2	Bachelor's degree
Real Estate Brokers	48	17%	\$16.3	High school diploma or equivalent
Mechanical Engineers	48	0%	\$45.2	Bachelor's degree
Software Developers, Applications	41	37%	\$41.7	Bachelor's degree
Bookkeeping, Accounting, and Auditing Clerks	40	18%	\$13.3	High school diploma or equivalent
Office Clerks, General	37	6%	\$11.0	High school diploma or equivalent
Software Developers, Systems Software	36	29%	\$46.6	Bachelor's degree
Lawyers	33	-8%	\$41.1	Doctoral or professional degree

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

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Shift-Share Analysis by Top Industry Sectors: Eastern Shore Region, VA

Defense and Security

Industries	Jobs 2014	National Trend, 2009-2014	Industry Trend, 2009-2014	Cumulative Expected Growth	Actual Job Growth, 2009-2014	Regional Performance, 2009-2014
		A	B	C=A+B	D	D-C
Federal Government, Military	328	28	-33	-5	-41	-36
Computer Systems Design Services	228	12	18	30	72	↑ 42
Other Personal and Household Goods Repair and Maintenance	71	4	3	7	20	↑ 13
Research and Development in the Physical, Engineering, and Life Sciences (except Biotechnology)	64	1	0	1	53	↑ 52
Power and Communication Line and Related Structures Construction	48	6	10	16	-25	-41
Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing	12	2	-6	-4	-13	-9
Custom Computer Programming Services	10	2	4	6	-15	-21

Note: Upward arrow (↑) indicates regional competitiveness. EMSI shows insufficient jobs for Ship Building and Repairing; Computer Facilities Management Services; Surgical Appliance and Supplies Manufacturing; Motor Vehicle Supplies and New Parts Merchant Wholesalers; Automobile and Other Motor Vehicle Merchant Wholesalers; Other Computer Related Services; Aircraft Engine and Engine Parts Manufacturing; and Security Systems Services (except Locksmiths).

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Top 15 Inputs by Dollars: Eastern Shore Region, VA

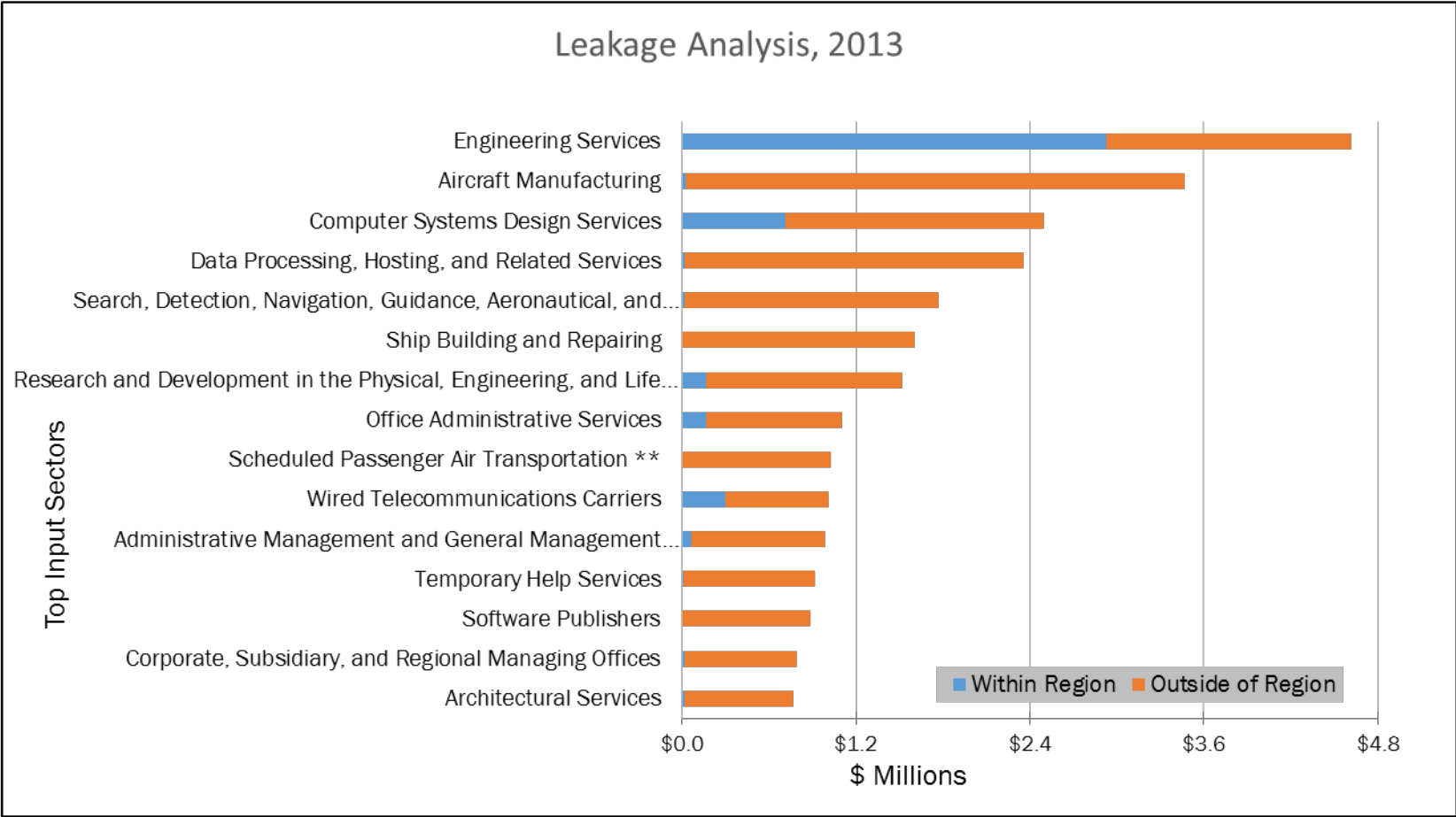
Defense and Security

Industries	Estimated Input (\$ Millions), 2013	% In-Region	% Out of Region
Engineering Services	\$4.62	63%	37%
Aircraft Manufacturing *	\$3.46	1%	99%
Computer Systems Design Services	\$2.50	29%	71%
Data Processing, Hosting, and Related Services	\$2.35	1%	99%
Search, Detection, Navigation, Guidance, Aeronautical, and Nautical System and Instrument Manufacturing	\$1.77	1%	99%
Ship Building and Repairing *	\$1.61	0%	100%
Research and Development in the Physical, Engineering, and Life Sciences (except Biotechnology)	\$1.52	11%	89%
Office Administrative Services	\$1.11	15%	85%
Scheduled Passenger Air Transportation **	\$1.03	0%	100%
Wired Telecommunications Carriers	\$1.01	30%	70%
Administrative Management and General Management Consulting Services	\$0.99	7%	93%
Temporary Help Services	\$0.92	2%	98%
Software Publishers *	\$0.89	0%	100%
Corporate, Subsidiary, and Regional Managing Offices	\$0.79	2%	98%
Architectural Services *	\$0.77	3%	97%

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

Top 15 Inputs by Dollars: Eastern Shore Region, VA

Defense and Security



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

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

Top Occupations: Eastern Shore Region, VA

Defense and Security

Occupations	Jobs 2014	% Change, 2009-2014	Median Hourly Earnings, 2014	Entry Level Education
Military occupations	328	-11%	\$14.7	N/A
Software Developers, Applications	34	36%	\$41.7	Bachelor's degree
Software Developers, Systems Software	28	40%	\$46.6	Bachelor's degree
Computer User Support Specialists	25	47%	\$16.5	Some college, no degree
Computer and Information Research Scientists	18	80%	\$46.9	Doctoral or professional degree
Tailors, Dressmakers, and Custom Sewers	16	33%	\$7.9	Less than high school
Computer Systems Analysts	15	25%	\$36.0	Bachelor's degree
Telecommunications Line Installers and Repairers	11	-21%	\$21.2	High school diploma or equivalent
Network and Computer Systems Administrators	10	25%	\$29.3	Bachelor's degree

Note: SOC (Standard Occupation Classification) 5-digit occupations are included by jobs in 2014. EMSI does not show sufficient jobs for Biochemists and Biophysicists; Electrical and Electronics Engineering Technicians; Secretaries and Administrative Assistants, Except Legal, Medical, and Executive; Executive Secretaries and Executive Administrative Assistants; Shipping, Receiving, and Traffic Clerks; and Stock Clerks and Order Fillers.

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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.



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