

North Carolina's Interstate Talent Flows: A Job-to-Job-Flow Dashboard

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What are we going to talk about?

- Why Interstate Talent Flows Matter
- About the Data
- Dashboard Walkthrough
- Key Findings
- How You Can Use It

Why Interstate Talent Flows Matter

- **Who's winning the talent war and in which industries?**
 - Shapes recruiting and retention strategy
- **Are wage gains significant for attracting/losing talent?**
 - Competitive wages or cost of living story
- **How do economic conditions impact trends?**
 - Great Recession, COVID-19 Pandemic, Great Resignation

Useful for employers, workforce, economic developers, policymakers, researchers, and more

What Is a Stable Job-to-Job Flow?

- **One worker moving directly from one steady job to another**
 - Works a few seasons at a job in Virginia, then a few seasons at a job in Charlotte, with little to no break in between — that is one flow.
- **The data counts these moves in and out of NC every quarter since 2000**
 - By state, by metro area, and by industry
- **It also reports what workers earned before and after the job move**
 - We can see whether the people arriving and leaving are earning more

Data Caveats¹

- **State UI covered workers only**
 - Leaves out federal employees, self-employed, etc.
- **Flows reflect job location, not where the worker lives**
- **Some data suppression to protect confidentiality**

¹ U.S. Census Bureau, *Job-to-Job Flows 101*. Available at: lehd.ces.census.gov/doc/j2j_101.pdf

Dashboard Overview

Dashboard Overview: Landing Page



NC Interstate Talent Competition

Worker flows between NC and every other state - 2001-2024 - Labor and Economic Analysis Division

National Overview

State Profile

Metro Profile

Download

About

Key Indicators

In 2024, NC had a net **+17,149 workers** across all interstate job-to-job flows.

This dashboard tracks workers who switched directly from a stable job in one state to a stable job in another, using the Census Bureau's LEHD Job-to-Job Flows data. Flows reflect job location, not worker residence. Explore national patterns, individual state relationships, or zoom in on a specific NC metro area.

TOTAL INFLOWS

91,332

workers arrived in NC

TOTAL OUTFLOWS

74,183

NC workers departed

TOP INDUSTRY GAIN

+3,599

Professional & Technical Services

TOP STATE PARTNER

South Carolina

36,597 combined flows

Data

About

Navigation

CHOOSE A STARTING POINT



National Overview

See how NC compares to every other state on a national map. Filter by year and industry, and click any state to jump to its full profile.

"Which states do NC job-switchers come from, and which ones are they leaving for?"

National Overview →



State Profile

Select any U.S. state and see detailed flows to and from NC, broken down by industry and year, including earnings comparisons.

"What NC industries are workers from Florida switching into?"

State Profile →



Metro Profile

Focus on one of NC's 17 metro areas and see detailed flows to and from other metros, broken down by industry and year.

"Where do Charlotte's finance workers come from, and where do they go?"

Metro Profile →

Dashboard Overview: About Page



About the NC Interstate Talent Competition Dashboard



What is this dashboard?

This dashboard shows how many workers switched jobs between North Carolina and every other U.S. state and metro area each year, broken down by industry. It uses the Census Bureau's LEHD Job-to-Job Flows (J2JS) data, which tracks workers who moved from one stable job to another, with no more than one quarter between jobs. Flows reflect where jobs are located, not where workers live.

How to use this dashboard

National Overview — Map of all U.S. states showing inflows, outflows, or net flow relative to NC. Use the controls to change the year, industry, and map mode. Click any state on the map to jump to its full profile. The industry tables below the chart show which sectors NC is gaining or losing workers in — click any row to filter the map and chart to that sector.

State Profile — Select a state, industry, and year. Stat boxes show worker volumes and wage comparisons. With All Industries selected, an industry gain/loss breakdown appears — click any row to filter to that sector and view which industries workers came from or switched into. With a specific industry selected, origin and destination industry tables appear.

Metro Profile — Select one of NC's 17 metro areas, an industry, and a year to see worker flows between that metro and partner metros outside NC. The industry table highlights which sectors are gaining or losing workers and which metro areas are the top sources and destinations. With a specific industry selected, the top 10 partner metros by inflow and outflow volume appear.

Key definitions

- **Inflow:** A worker left a job in another state and took a job in NC.
- **Outflow:** An NC worker left for a job in another state.
- **Net:** Inflows minus outflows. Positive means NC received more workers than it sent.
- **Industry:** The two-digit NAICS sector of the NC-side establishment. Location and industry always reflect the job site, not where the worker lived.
- **Annual Wage Change:** Estimated change in annualized earnings between a worker's prior job and their new job, weighted by worker count.
- **Suppressed values (—):** Some small industry flows and associated wages are withheld by the Census Bureau to protect worker privacy. These appear as — throughout the dashboard.

Data source

LEHD J2JS (Job-to-Job Flows, Stable Employment), U.S. Census Bureau. Covers UI-covered employment only — **federal employees (civilian and military) and the self-employed are not included** and are not reflected in any figures shown. Available at lehd.ces.census.gov.

Methodology

This dashboard uses the **LEHD Job-to-Job Flows (J2JS), Stable Employment series**. A flow is counted when a worker has earnings in three consecutive quarters at the origin job (confirming stable employment there) and earnings in three consecutive quarters at the destination job (confirming stable employment there), with the job change occurring within or between adjacent quarters. This full-quarter stability requirement excludes brief, seasonal, or transitional jobs at both ends of the transition — only ongoing employment relationships are counted.

Geographic attribution follows the establishment side: inflows are counted in the NC industry where the arriving worker's new job is located; outflows are counted in the NC industry where the departing worker's prior job was located.

Annual wage change is computed as the change in average annualized earnings between a worker's origin job and their destination job, weighted by worker count across all flows in that cell. Raw earnings in the source data are quarterly; all values displayed are multiplied by four to show annualized figures. Suppressed cells are excluded from aggregation rather than treated as zero.

A note on wage figures: Wage figures are weighted averages across all quarters with non-suppressed earnings data. Where some quarters within a year are suppressed, the figure reflects available quarters only and may not represent the full annual average. Figures based on small worker counts are also more susceptible to outliers. Interpret wage figures for small industries or geographies with caution.

Annual figures sum flows across all four quarters of the reference year. A pair-year is only included if all four quarters are present.

Dashboard Overview: National Overview

Key Findings

Key Indicators

National Overview — NC worker flows vs. every other U.S. state, by year and industry.

1 Map shows

Choose whether to display net flow, inflows, or outflows.

Net Flow

2 Filter by industry

Narrow to a specific NAICS sector, or keep All Industries for aggregate flows.

All Industries

3 Select a year

Data spans multiple years. Choose the reference year.

2024

Some small industry flows are hidden to protect worker privacy.

Federal employees (civilian and military) and the self-employed are not covered by this data.

Filters & Disclaimers

TOTAL INFLOWS TO NC

91,332

Workers arriving — all industries

TOTAL OUTFLOWS FROM NC

74,183

NC workers departing — all industries

NET WORKERS

+17,149

NC gained more than it lost

ANNUAL INFLOW WAGE CHANGE

▲ +\$3,774 (+4.5%)

Arrivers vs. prior job

ANNUAL OUTFLOW WAGE CHANGE

▲ +\$9,483 (+12.4%)

Leavers vs. NC job

KEY FINDINGS

Top Growth Sector: Professional & Technical Services

NC's **Professional & Technical Services** sector had a net gain of **3,599 workers** in 2024. Arrivers earned **\$6,181/year (5%) more** at their new NC job than at their prior job.

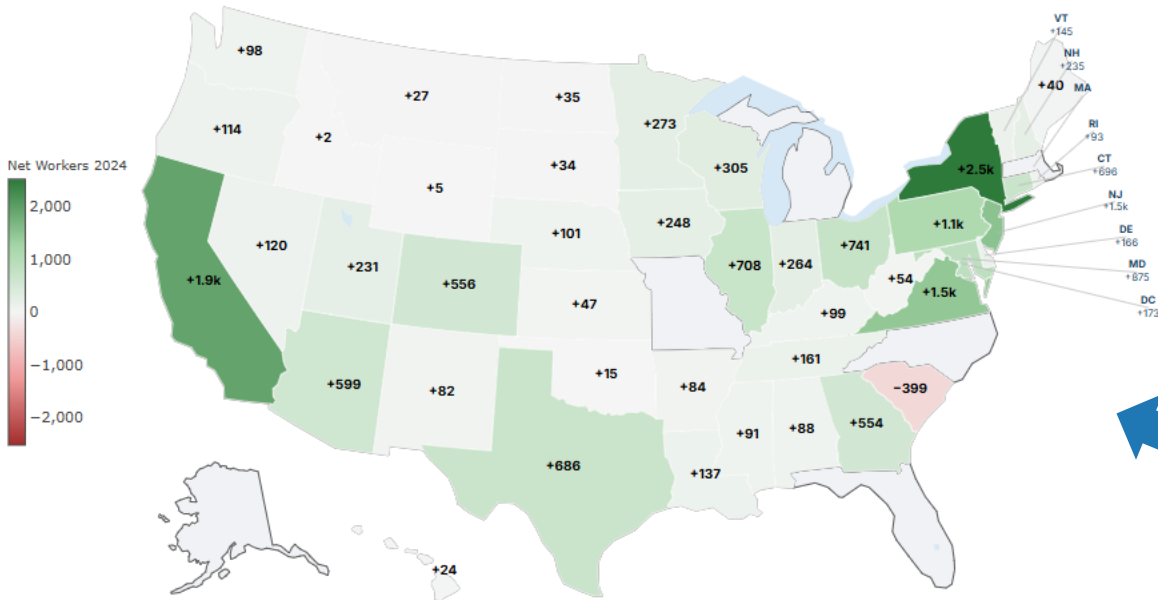
Biggest Sector Loss: Management of Companies

NC's **Management of Companies** sector had a net loss of **288 workers** in 2024. Those who left earned **\$7,828/year (7%) more** at their new job than at their NC job.

NC's Cumulative Worker Balance

Since 2001, NC has had a cumulative net gain of **312,387 workers** from interstate job switching.

Net Worker Flows — All Industries, 2024



Select any state to view its full profile in the State Profile tab.

Flow Map

Top 5 Net Gains

1. New York	+2,518
2. California	+1,938
3. New Jersey	+1,529
4. Virginia	+1,450
5. Pennsylvania	+1,107

Top 5 Net Losses

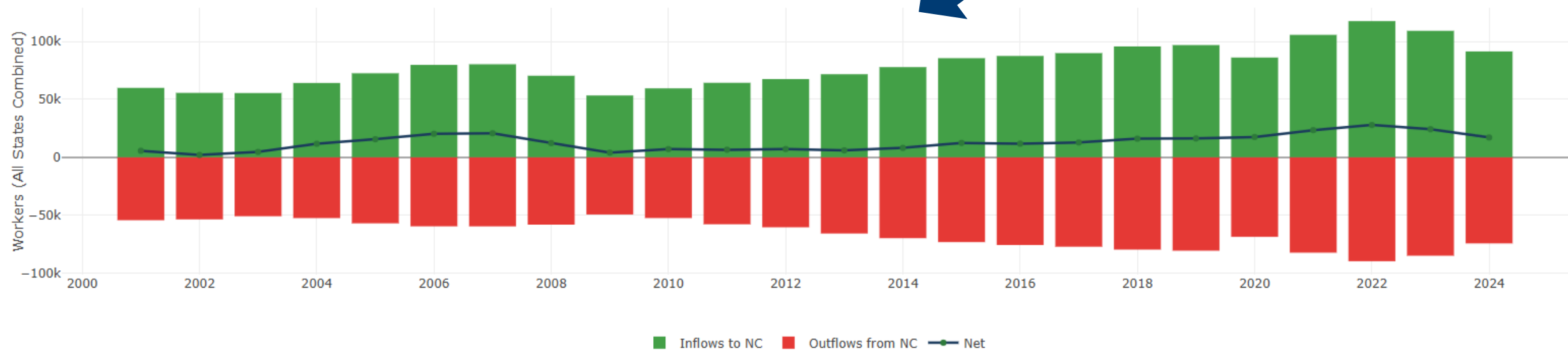
1. South Carolina	-399
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Top 5 State Net Gains and Losses

Dashboard Overview: National Overview

NC-National Worker Flows over Time

NC Worker Flow Over Time — All States



Source: LEHD J2JS (Stable Employment), U.S. Census Bureau | 2001-2024

Dashboard Overview: National Overview (All Industries)

Industries Where NC Has Net Gains — 2024

Net-Wins

Select any row to filter the map and chart to that sector.

Industry ⓘ	Inflows ⓘ	Outflows ⓘ	Net ⓘ	Annual Inflow Wage Change ⓘ	Annual Outflow Wage Change ⓘ
Professional & Technical Services	11,129	7,530	+3,599	▲ +\$6,181 (+5.5%)	▲ +\$11,821 (+11.5%)
Health Care & Social Assistance	11,301	8,238	+3,063	▲ +\$11,564 (+16.4%)	▲ +\$16,068 (+22.7%)
Finance & Insurance	6,700	3,928	+2,772	▼ -\$3,375 (-2.7%)	▲ +\$3,804 (+3.3%)
Administrative & Support Services	8,501	7,004	+1,497	▼ -\$2,592 (-3.5%)	▲ +\$8,361 (+12.9%)
Wholesale Trade	4,869	3,419	+1,450	▲ +\$4,127 (+3.4%)	▲ +\$9,150 (+7.8%)
Retail Trade	8,982	7,857	+1,125	▼ -\$1,039 (-1.9%)	▲ +\$7,370 (+15.1%)
Transportation & Warehousing	4,808	3,784	+1,024	▲ +\$2,598 (+3.6%)	▲ +\$7,423 (+10.3%)
Construction	6,709	5,977	+732	▲ +\$5,820 (+7.3%)	▲ +\$5,697 (+6.9%)
Information	2,521	1,936	+585	▲ +\$1,774 (+1.2%)	▲ +\$13,949 (+11%)

Industries Where NC Has Net Losses — 2024

Net-Losses

Select any row to filter the map and chart to that sector.

Industry ⓘ	Inflows ⓘ	Outflows ⓘ	Net ⓘ	Annual Inflow Wage Change ⓘ	Annual Outflow Wage Change ⓘ
Management of Companies	1,575	1,863	-288	▲ +\$10,083 (+9%)	▲ +\$7,828 (+6.6%)
Accommodation & Food Services	6,283	6,532	-249	▼ -\$2,651 (-7%)	▲ +\$8,603 (+28.3%)
Agriculture, Forestry, Fishing	243	297	-54	▲ +\$1,388 (+2.6%)	▲ +\$3,942 (+7.9%)

Example:

- **Inflows** – any out-of-state industry to NC Professional & Technical Services
- **Outflows** - NC Prof. & Technical Services to any out-of-state industry

Dashboard Overview: National Overview (Single Industry)

Which Industries Do Incoming NC Manufacturing Workers Come From — 2024 (All Other States)

Origin Industry	Workers	Annual Wage Change
Manufacturing	2,417	▲ +\$14,611 (+14.4%)
Wholesale Trade	593	▲ +\$2,931 (+2.2%)
Professional & Technical Services	403	▲ +\$1,461 (+1.1%)
Transportation & Warehousing	336	▲ +\$10,681 (+19.6%)
Retail Trade	316	▲ +\$19,217 (+43.6%)
Administrative & Support Services	295	▲ +\$12,976 (+21.5%)
Accommodation & Food Services	254	▲ +\$17,059 (+64.5%)
Construction	238	▲ +\$9,120 (+11.3%)
Management of Companies	195	▲ +\$5,759 (+3.7%)
Health Care & Social Assistance	118	▲ +\$14,959 (+28.9%)
Other Services	98	▲ +\$16,853 (+22.2%)
Information	75	▼ -\$16,742 (-9.7%)
Educational Services	72	▲ +\$50,465 (+169.1%)
Finance & Insurance	65	▼ -\$57,001 (-36.1%)
Agriculture, Forestry, Fishing	52	▼ -\$488 (-1.3%)
Public Administration	48	▲ +\$26,631 (+56.6%)
Real Estate & Leasing	47	▼ -\$9,842 (-15.8%)
Arts, Entertainment & Recreation	39	▼ -\$1,567 (-2%)
Mining & Oil/Gas Extraction	25	▲ +\$18,862 (+19.5%)
Utilities	15	▼ -\$57,416 (-40.2%)

Which Industries Do NC Manufacturing Workers Leave For — 2024 (All Other States)

Destination Industry	Workers	Annual Wage Change
Manufacturing	2,016	▲ +\$14,119 (+14.7%)
Wholesale Trade	540	▲ +\$6,615 (+5.4%)
Administrative & Support Services	421	▼ -\$4,128 (-7.1%)
Professional & Technical Services	331	▲ +\$13,187 (+11.5%)
Transportation & Warehousing	307	▼ -\$3,078 (-5.6%)
Retail Trade	297	▼ -\$6,694 (-12.5%)
Construction	248	▲ +\$10,173 (+15.9%)
Accommodation & Food Services	186	▼ -\$9,761 (-25.5%)
Management of Companies	181	▲ +\$40,887 (+40.9%)
Health Care & Social Assistance	129	▲ +\$3,564 (+7.4%)
Other Services	94	▼ -\$17,791 (-22.6%)
Information	83	▲ +\$3,746 (+3.4%)
Educational Services	81	▲ +\$44,703 (+68.6%)
Real Estate & Leasing	62	▲ +\$1,200 (+2.2%)
Finance & Insurance	62	▲ +\$77,402 (+97.3%)
Agriculture, Forestry, Fishing	58	▲ +\$875 (+1.4%)
Arts, Entertainment & Recreation	37	▼ -\$12,307 (-24.5%)
Public Administration	35	▼ -\$47,674 (-35.4%)
Mining & Oil/Gas Extraction	29	▲ +\$2,300 (+3.5%)
Utilities	18	—

Dashboard Overview: State Profile

State Profile — NC worker flows vs. a selected U.S. state, by year and industry.

1 Choose a state

Select any U.S. state to view its flows with NC.

Alabama

2 Filter by industry

Narrow to a specific NAICS sector, or keep All Industries for aggregate flows.

All Industries

3 Select a year

Data spans multiple years. Choose the reference year.

2024

Some small industry flows are hidden to protect worker privacy.

Federal employees (civilian and military) and the self-employed are not covered by this data.

Same as National Overview

INFLOWS FROM ALABAMA

1,112

Workers arriving — all industries

OUTFLOWS TO ALABAMA

1,024

NC workers departing — all industries

NET 2024

+88

-155 vs prior yr

ANNUAL INFLOW WAGE CHANGE

▲ +\$8,230 (+11.6%)

Arrivers vs. prior job

ANNUAL OUTFLOW WAGE CHANGE

▼ -\$3,777 (-4.7%)

Leavers vs. NC job

KEY FINDINGS

Alabama: NC's #16 Labor Market Connection

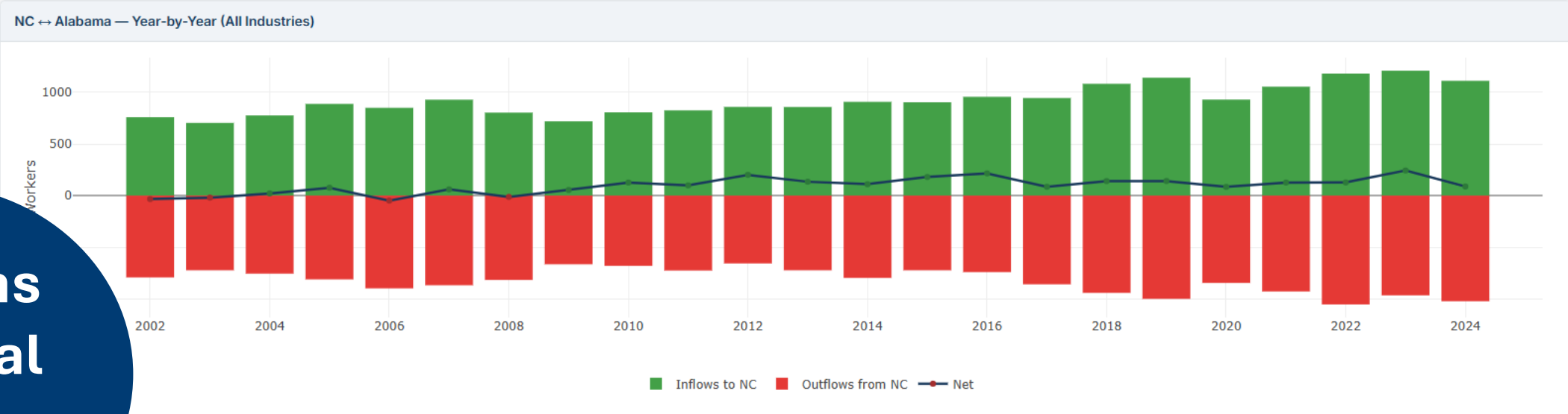
Alabama is NC's #16 largest labor market connection in 2024 — 2,136 workers exchanged in both directions.

Alabama: NC's #32 State by Net Workers

By net flows, Alabama ranks #32 of 45 states for NC in 2024 — a net gain of 88 workers.

NC Gaining from Alabama — 16 Years Running

NC has gained workers from Alabama for 16 consecutive years through 2024.



Source: LEHD J2JS (Stable Employment), U.S. Census Bureau | 2001-2024

Industries Where NC Has Net Gains from Alabama — 2024

Click any row to view sector-specific data.

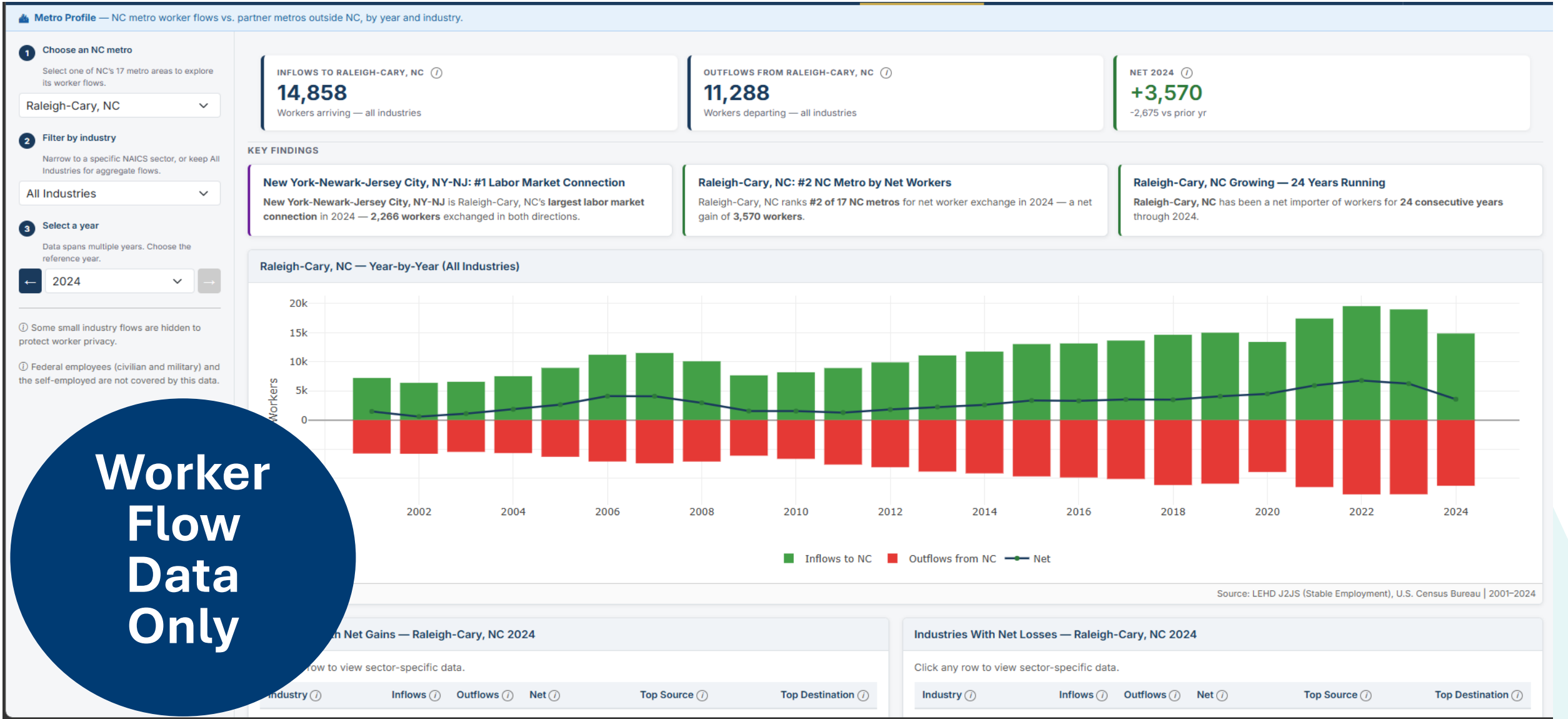
Industry	Inflows	Outflows	Net	Annual Inflow Wage Change	Annual Outflow Wage Change
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Industries Where NC Has Net Losses to Alabama — 2024

Click any row to view sector-specific data.

Industry	Inflows	Outflows	Net	Annual Inflow Wage Change	Annual Outflow Wage Change
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Dashboard Overview: Metro Profile



Worker Flow Data Only

Dashboard Overview: Metro Profile (All Industries)

Industries With Net Gains — Raleigh-Cary, NC 2024

Click any row to view sector-specific data.

Industry ⓘ	Inflows ⓘ	Outflows ⓘ	Net ⓘ	Top Source ⓘ	Top Destination ⓘ
Professional & Technical Services	2,964	1,987	+977	Washington-Arlington-Alexandria, DC-VA-MD-WV	Washington-Arlington-Alexandria, DC-VA-MD-WV
Health Care & Social Assistance	1,242	834	+408	New York-Newark-Jersey City, NY-NJ	Atlanta-Sandy Springs-Roswell, GA
Finance & Insurance	991	643	+348	New York-Newark-Jersey City, NY-NJ	New York-Newark-Jersey City, NY-NJ
Administrative & Support Services	1,591	1,259	+332	New York-Newark-Jersey City, NY-NJ	Washington-Arlington-Alexandria, DC-VA-MD-WV
Wholesale Trade	836	577	+259	New York-Newark-Jersey City, NY-NJ	Columbia, SC
Educational Services	586	406	+180	New York-Newark-Jersey City, NY-NJ	Washington-Arlington-Alexandria, DC-VA-MD-WV
Transportation & Warehousing	646	480	+166	New York-Newark-Jersey City, NY-NJ	New York-Newark-Jersey City, NY-NJ
Information	689	547	+142	New York-Newark-Jersey City, NY-NJ	New York-Newark-Jersey City, NY-NJ
Retail Trade	1,262	1,154	+108	New York-Newark-Jersey City, NY-NJ	New York-Newark-Jersey City, NY-NJ
Manufacturing	468	369	+99	Not in metropolitan area, TX	Washington-Arlington-Alexandria, DC-VA-MD-WV
Public Administration	294	207	+87	New York-Newark-Jersey City, NY-NJ	Washington-Arlington-Alexandria, DC-VA-MD-WV
Management of Companies	316	242	+74	Phoenix-Mesa-Chandler, AZ	New York-Newark-Jersey City, NY-NJ
Construction	1,069	1,010	+59	Washington-Arlington-Alexandria, DC-VA-MD-WV	Atlanta-Sandy Springs-Roswell, GA

Industries With Net Losses — Raleigh-Cary, NC 2024

Click any row to view sector-specific data.

Industry ⓘ	Inflows ⓘ	Outflows ⓘ	Net ⓘ	Top Source ⓘ	Top Destination ⓘ
Accommodation & Food Services	720	750	-30	New York-Newark-Jersey City, NY-NJ	New York-Newark-Jersey City, NY-NJ
Utilities	40	48	-8	Florence, SC	Huntington-Ashland, WV-KY-OH
Agriculture, Forestry, Fishing	17	17	+0	Charlottesville, VA	Greenville-Anderson-Greer, SC

Dashboard Overview: Metro Profile (Single Industry)

Top Ten Source/Destination Metros for Industry

Top 10 Professional & Technical Services Sources — Raleigh-Cary, NC (2024)

Metro Area	Inflows
Washington-Arlington-Alexandria, DC-VA-MD-WV	340
New York-Newark-Jersey City, NY-NJ	331
Dallas-Fort Worth-Arlington, TX	144
Atlanta-Sandy Springs-Roswell, GA	129
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	112
Chicago-Naperville-Elgin, IL-IN	105
Denver-Aurora-Centennial, CO	68
Houston-Pasadena-The Woodlands, TX	65
Richmond, VA	61
Los Angeles-Long Beach-Anaheim, CA	60

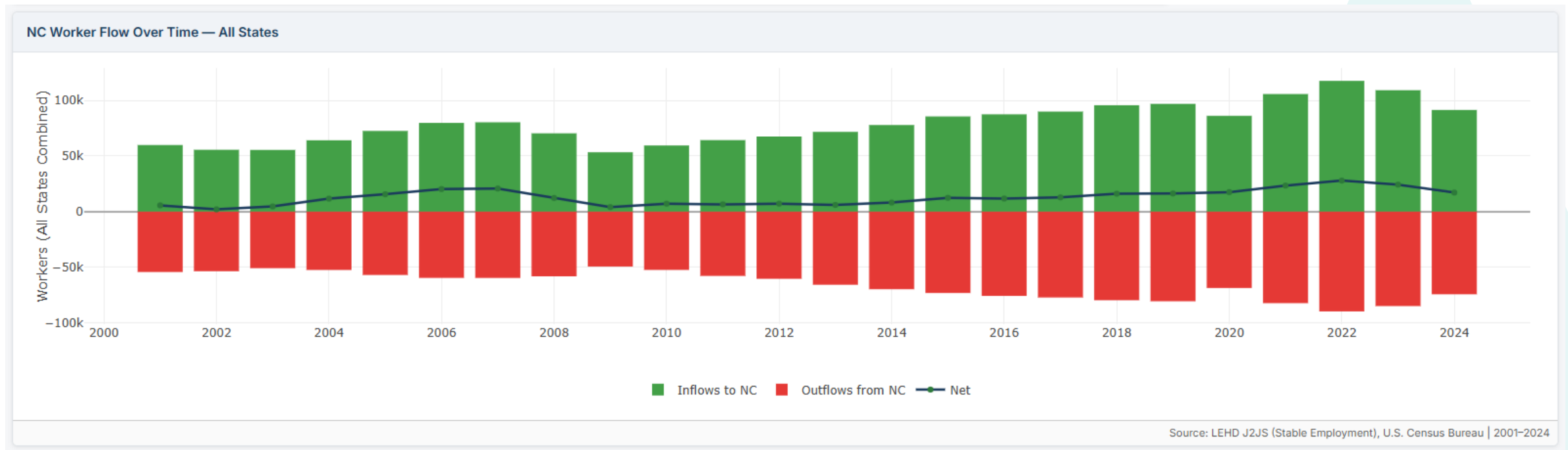
Top 10 Professional & Technical Services Destinations — Raleigh-Cary, NC (2024)

Metro Area	Outflows
Washington-Arlington-Alexandria, DC-VA-MD-WV	180
New York-Newark-Jersey City, NY-NJ	167
Atlanta-Sandy Springs-Roswell, GA	149
Dallas-Fort Worth-Arlington, TX	119
Greenville-Anderson-Greer, SC	84
Chicago-Naperville-Elgin, IL-IN	70
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	64
Charleston-North Charleston, SC	57
Houston-Pasadena-The Woodlands, TX	52
Richmond, VA	52

Findings

NC Wins Every Year

- Cumulative net gain of ~**312,000** stable job-switchers since 2001
 - +17,000 in 2024
- Largest combination of inflows/outflows in 2022; smallest in 2009



NC Gains Workers from Nearly Every State (2024)

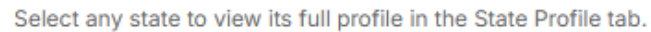
↑ Top 5 Net Gains

1. New York	+2,518
2. California	+1,938
3. New Jersey	+1,529
4. Virginia	+1,450
5. Pennsylvania	+1,107

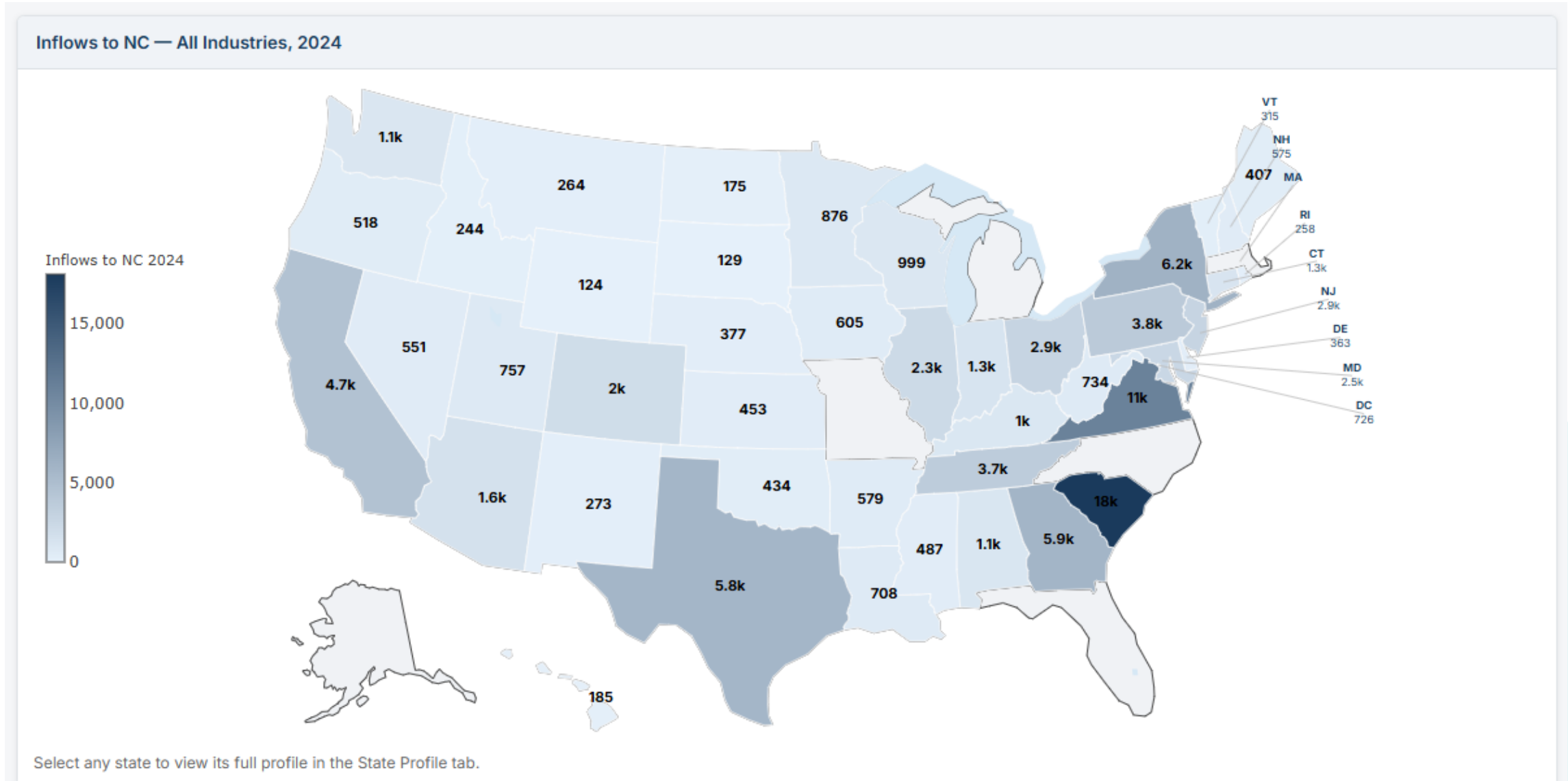
↓ Top 5 Net Losses

1. South Carolina	-399
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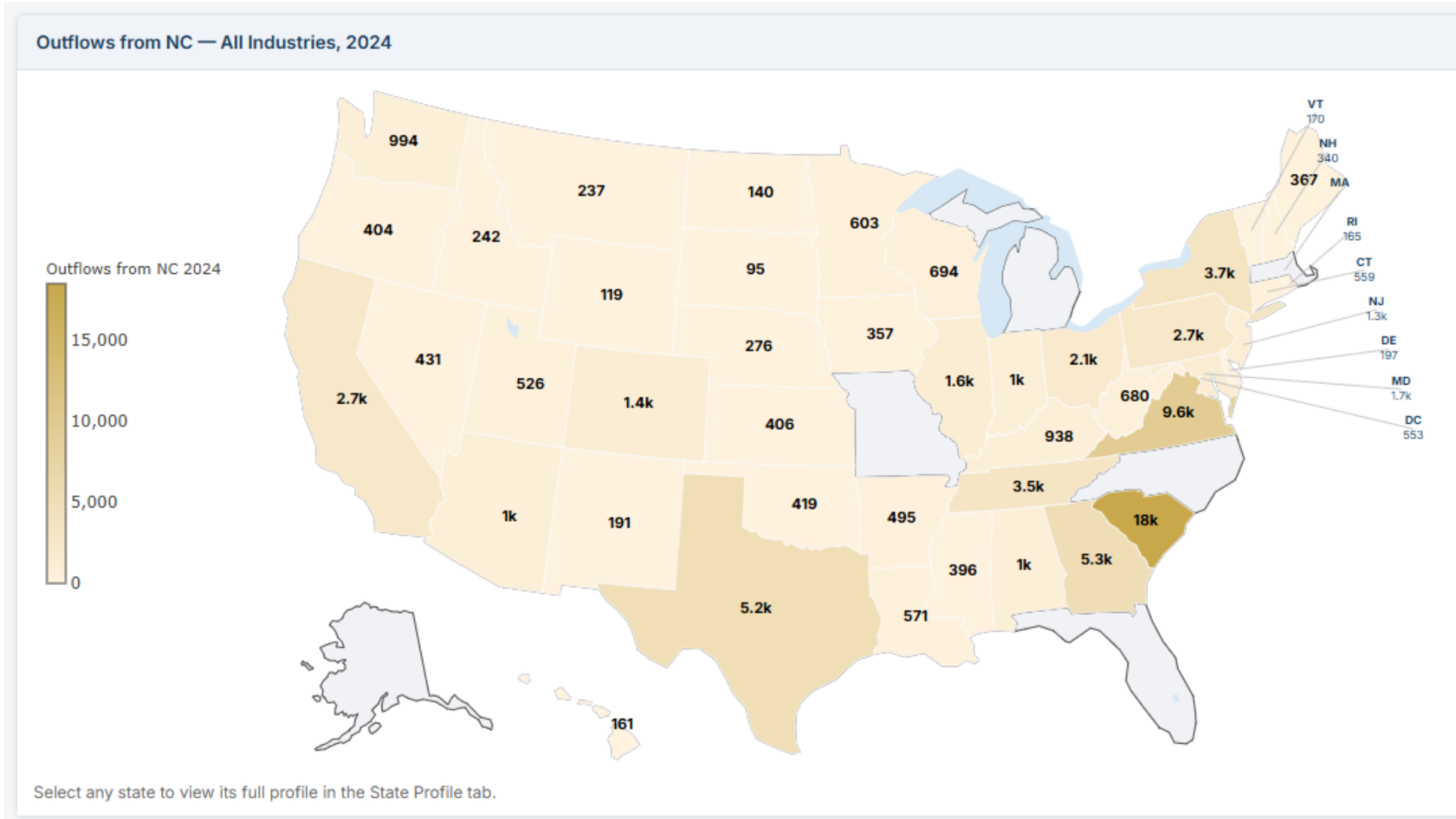
Net Worker Flows — All Industries, 2024



Largest Labor Partners: Population and Proximity (Inflows)



Largest Labor Partners: Population and Proximity (Outflows)



17 of 20 Industries Posted Net Gains for NC in 2024

Industries Where NC Has Net Gains — 2024

Select any row to filter the map and chart to that sector.

Industry ⓘ	Inflows ⓘ	Outflows ⓘ	Net ⓘ	Annual Inflow Wage Change ⓘ	Annual Outflow Wage Change ⓘ
Professional & Technical Services	11,129	7,530	+3,599	▲ +\$6,181 (+5.5%)	▲ +\$11,821 (+11.5%)
Health Care & Social Assistance	11,301	8,238	+3,063	▲ +\$11,564 (+16.4%)	▲ +\$16,068 (+22.7%)
Finance & Insurance	6,700	3,928	+2,772	▼ -\$3,375 (-2.7%)	▲ +\$3,804 (+3.3%)
Administrative & Support Services	8,501	7,004	+1,497	▼ -\$2,592 (-3.5%)	▲ +\$8,361 (+12.9%)
Wholesale Trade	4,869	3,419	+1,450	▲ +\$4,127 (+3.4%)	▲ +\$9,150 (+7.8%)

Only 3 Industries Posted Slight Net Losses

Industries Where NC Has Net Losses — 2024

Select any row to filter the map and chart to that sector.

Industry ⓘ	Inflows ⓘ	Outflows ⓘ	Net ⓘ	Annual Inflow Wage Change ⓘ	Annual Outflow Wage Change ⓘ
Management of Companies	1,575	1,863	-288	▲ +\$10,083 (+9%)	▲ +\$7,828 (+6.6%)
Accommodation & Food Services	6,283	6,532	-249	▼ -\$2,651 (-7%)	▲ +\$8,603 (+28.3%)
Agriculture, Forestry, Fishing	243	297	-54	▲ +\$1,388 (+2.6%)	▲ +\$3,942 (+7.9%)

NC Attracts Workers Despite a Wage Premium Gap

- Workers who left NC in 2024 saw bigger earnings increases than those who arrived — yet NC still nets +17k workers
 - A dollar goes further here: NC cost of living (94.3) below U.S. avg (100) and well below several top partners: CA (110.7), NY (107.9), VA (101.1)¹

ANNUAL INFLOW WAGE
CHANGE ⓘ

▲ **+\$3,774**
(+4.5%)

Arrivers vs. prior job

ANNUAL OUTFLOW WAGE
CHANGE ⓘ

▲ **+\$9,483**
(+12.4%)

Leavers vs. NC job

¹ U.S. Bureau of Economic Analysis, *Real Personal Consumption Expenditures by State and Real Personal Income by State, 2024*

Most Job Changes Happen Within NC

- In 2024, interstate stable job-to-job inflows represented **~17% of all stable job-to-job hires** in NC (91,332 of 537,924)¹
- NC's net gain of 17,149 workers represents **~0.35% of total NC covered employment (4.9m)**²

¹ U.S. Census Bureau, Job-to-Job Flows Explorer. j2jexplorer.ces.census.gov

² BLS Quarterly Census of Employment and Wages, 2024. NC Department of Commerce D4. d4.nccommerce.com

How You Can Use It

- **Knowing your labor partners**
 - Much of your out-of-state worker trade is with a handful of metros/states, not the whole country
- **Building the economic case for NC**
 - NC keeps winning workers on net: gains every year since 2001, led in 2024 by professional and technical services, health care, and finance
- **Seeing how many workers your industries gain from or lose to other states**
 - A starting point for training and retention conversations – paired with employment, wage, and other local data
- **Tracking how job switching responds to the economy**
 - Flows since 2001 cover the Great Recession, the pandemic, and the Great Resignation

Metro Profile can filter to your metro area and its industries.

Thank You

- Check out the J2J dashboard: lead.nc.gov/J2J
- Read the blog: commerce.nc.gov/news/the-lead-feed
 - ***“North Carolina Is Winning the Interstate Talent Competition. A New Dashboard Tracks Every Flow.” (May 5, 2026)***
- See our other products: lead.commerce.gov
- Email: dylan.craig@commerce.nc.gov
- LinkedIn: linkedin.com/in/dylan-s-craig