

AN ANNUAL REPORT FROM:

Midlands Regional
Competitiveness Council

Elevate Midlands

Innovation, Culture
& Opportunity

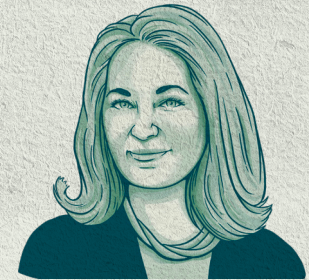
2026

A Letter from the Council

We want to start by thanking all our sponsors, partners, and volunteers who spent countless hours working to make this report possible. The Midlands Regional Competitiveness Council has existed since 2003 (with a few different names along the way) and continues to evolve to keep up with the Midlands' growth trajectory. And since 2014, a report has been published annually and shared with the community, with the intent to demonstrate how we stack up against 11 other regions.

This year's Elevate Midlands report (which is being published digitally only for the first time) focuses less on our traditional rankings against those eleven other regions and more on our first-ever business leader, resident, and student sentiment study. We hope you find value in the insights shared within the report and take action based on what you learn. It is up to each of us to determine the best ways to elevate the Midlands and we're excited to see the improvements you'll lead.

Thank you for making a difference every day.



Melanie Huggins

Co-Chair, Midlands Regional
Competitiveness Council



Brad Fultz

Co-Chair, Midlands Regional
Competitiveness Council



Economic Profile

The Midlands, with Columbia at its center, is a region on the rise. A young, educated workforce, diverse industries, affordable living and steady population growth are creating a strong environment for people and businesses to put down roots.



Since 2022, announced economic development projects have brought nearly **\$3.4 billion in capital investment and more than 7,000 new jobs** to the Midlands.

Dr. Joey Von Nessen's six competitiveness indices suggest the Midlands combines a strong business environment with improving innovation capacity but continues to face challenges in talent competitiveness and the concentration of high wage industries. While recent economic growth has been driven largely by service sector expansion, stronger gains in productivity and wages will depend on expanding high impact industry clusters. His analysis identifies two long term opportunities:

Attracting a larger share of the Southeast's population growth.

Retaining more graduates from the region's colleges and universities.

Midlands Industry Clusters & Wages

INDUSTRY	EMPL	AVG ANN WAGES	*LQ
Healthcare and Social Assistance	64,004	\$68,215	0.96
Retail Trade	45,381	\$39,292	1.12
Accommodation and Food Services	37,405	\$23,390	1.01
Educational Services	36,354	\$60,655	1.05
Public Administration	34,588	\$64,016	1.74
Manufacturing	31,855	\$76,575	0.97
Administrative; Support; Waste Management; Remediation Services	27,768	\$43,942	1.09
Finance and Insurance	24,609	\$89,168	1.48
Professional, Scientific and Technical Services	22,334	\$94,908	0.73
All Other	100,536	\$63,611	0.89
Total - All Industries	424,835	\$60,804	1.00

***LQ= Location Quotient, the ratio to the national average.**

LQ of 0.96 means 96% of the national average (or 4% less than the national average).

LQ of 1.12 means 112% of the national average (or 12% more than the national average).

LQ of 1.0 means equal to the national average.

Sentiment Study

This independent quantitative study examined how residents, university students and business leaders perceive the Midlands region (the Columbia, SC MSA).

Data was collected using a mixed-mode approach:

an online panel
via RepData



in-person intercept
surveys with USC
students



an email survey sent
to area college and
university students



The study's goal was to capture and analyze perceptions of the region among three key audiences: students, residents, and business leaders.



The Student Perspective

83% of students are overall satisfied with the Midlands area.

Students are highly satisfied with the Midlands and feel more connected the longer they live here. They point to a welcoming community, expanding amenities and growing opportunities as reasons the region stands out from others they've lived in. While many students hope to build their future here, expanding career opportunities will be key to retaining the next generation of talent and sustaining the region's growth.

The Talent Pipeline



[VISIT USC'S WEBSITE](#)



[VISIT MTC'S WEBSITE](#)



[VISIT ALLEN UNIVERSITY'S WEBSITE](#)



[VISIT BENEDICT'S WEBSITE](#)

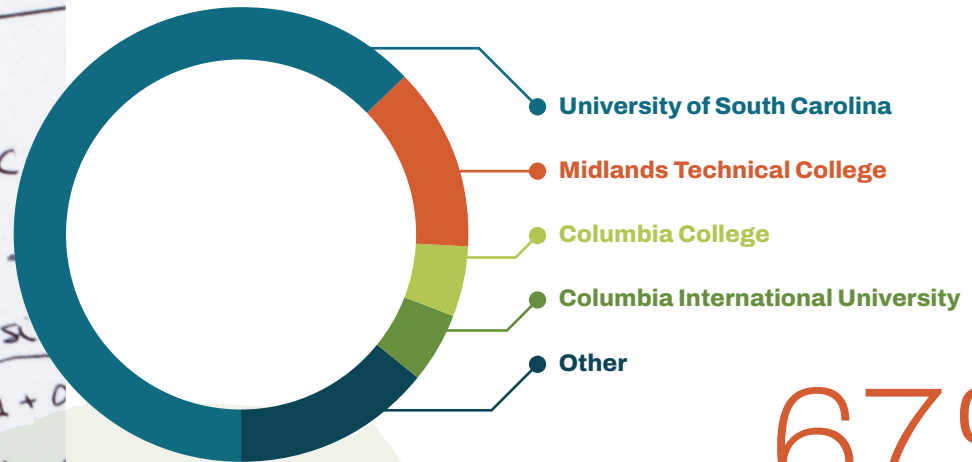


[VISIT COLUMBIA COLLEGE'S WEBSITE](#)



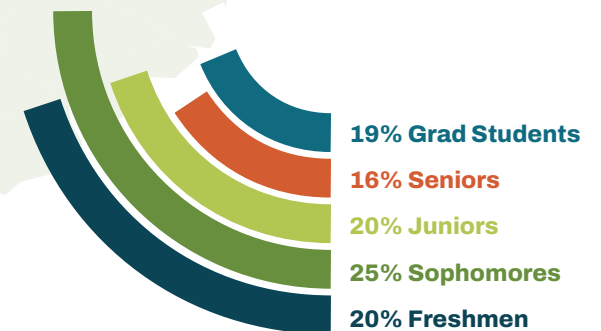
[VISIT CIU'S WEBSITE](#)

The Student Respondent Profile



67%
ARE IN-STATE
STUDENTS.

38%
GREW UP IN
THE MIDLANDS.



Behind the Sentiment

34%

PLAN TO STAY IN THE AREA.

29%

ARE UNDECIDED IN STAYING OR LEAVING THE MIDLANDS AFTER GRADUATION

37%

PLAN TO LEAVE THE AREA.

Of those 37%

50%

say a job or career opportunity is their reason for leaving.



BUSINESS LEADER OPPORTUNITY:

Engage students early at the annual Columbia Hiring Fair to connect career opportunities before they decide where to go after graduation.

46%

consider the Midlands much better or better than other regions they have lived in or considered.

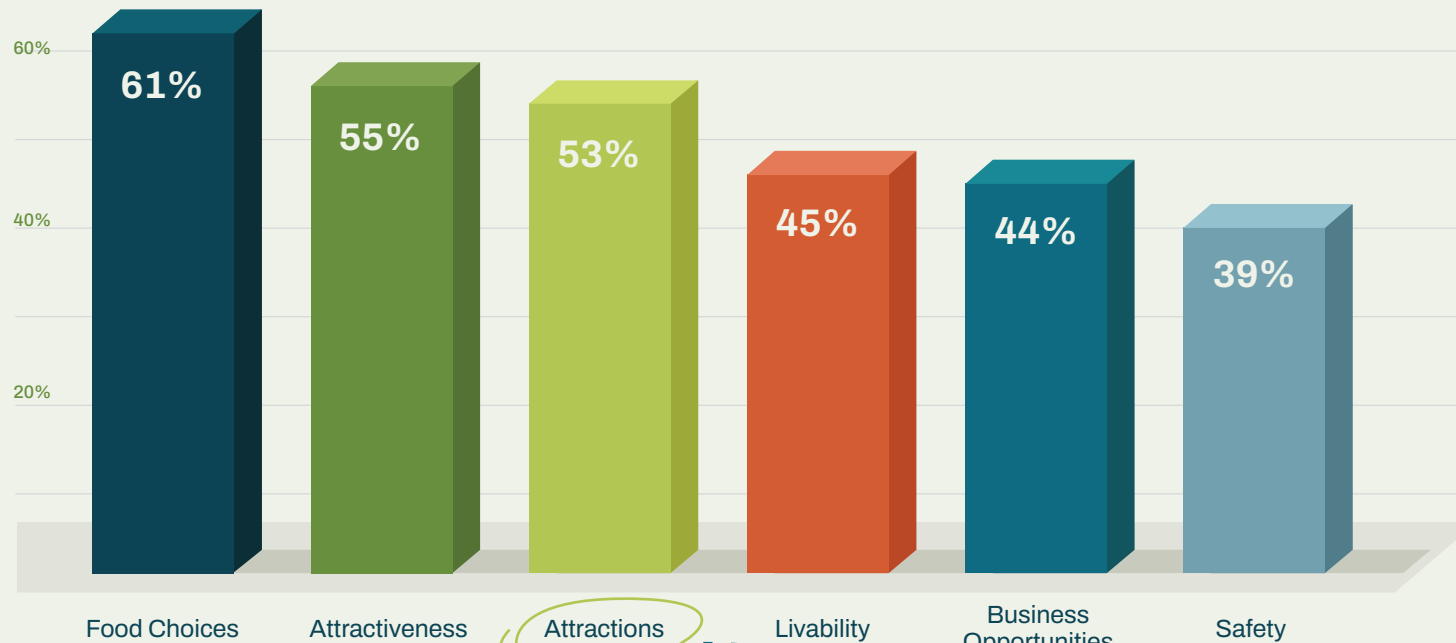
“

The community here is unrivaled. I've lived in nine communities now across six states. Columbia and the broader Midlands community is the most warm, collegial and inviting place I've ever lived. I will be staying after law school!

”

The Student Angle

PERCENTAGE OF STUDENTS THAT SAY THEY SEE PROGRESS



#1
BEST FARMERS MARKET
Soda City Market
USA Today, 2025





The Resident Perspective

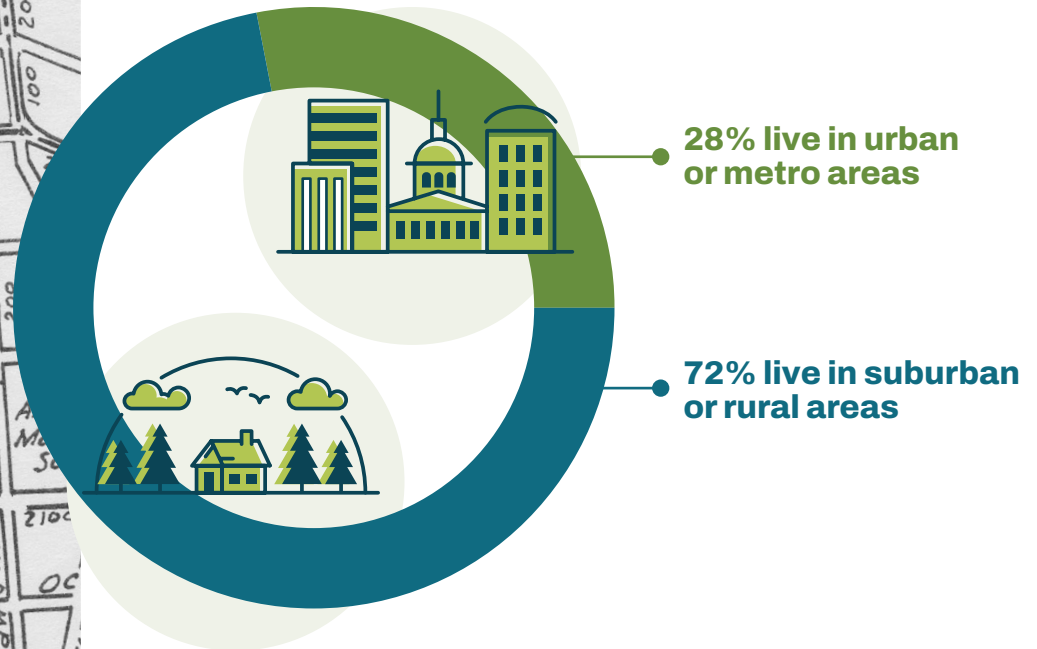
85% of residents are overall satisfied with the Midlands area.

Residents' voices provide one of the clearest measures of the Midlands' success, highlighting both the region's progress and the opportunities ahead.

Residents value the Midlands for its welcoming community, quality of life and continued growth. Many recognize meaningful improvements across the region, particularly in dining, attractions and overall livability, while expressing pride in calling the Midlands home. At the same time, residents point to infrastructure, public safety and support for business growth as important opportunities to ensure the region's progress keeps pace with its rapid growth.

The Resident Respondent Profile

67%
HAVE LIVED HERE
10+ YEARS.



88% SAY SATISFACTION
HAS STAYED THE
SAME OR IMPROVED.

**TOP ATTRACTIONS
DRAWING RESIDENTS IN:**

24%
food and
restaurants

22%
outdoor and
park access

21%
the weather

Behind the Sentiment

“

I consider the Midlands better because it offers a very good balance of affordability, a quieter lifestyle and convenient access to essential services. It also feels less crowded while still providing enough opportunities for work and daily living.

”

58%

rate the Midlands better
than other regions.

73%

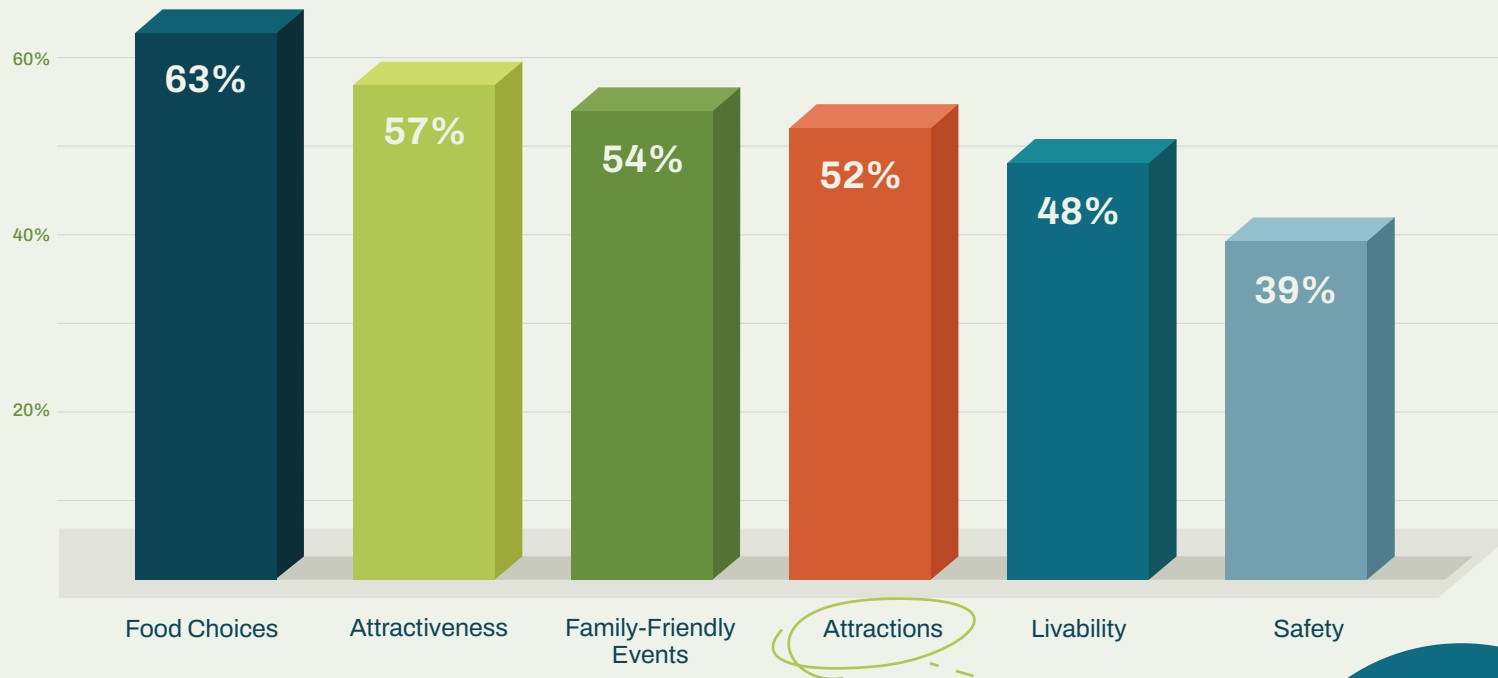
feel the Midlands is growing
in a sustainable way.

80%

feel safe in the Midlands.

The Resident Angle

PERCENTAGE OF RESIDENTS THAT SAY THEY SEE PROGRESS



A photograph of two women walking outdoors. The woman on the left has long blonde hair and is wearing a dark blue short-sleeved top and a red skirt with a black and white pattern. The woman on the right has dark skin and braided hair, wearing a white short-sleeved top and grey trousers. They are both smiling and looking towards the right. The background shows a blurred outdoor setting with other people and buildings.

The Business Leader Perspective

97% of business leaders are overall satisfied with the Midlands area.

Business leaders' experiences illustrate the Midlands' economic momentum while highlighting opportunities to strengthen the region's long-term competitiveness.

Business leaders see the Midlands as a strong place to invest, grow and build for the future. Looking ahead, they should continue to identify opportunities to strengthen infrastructure, expand access to capital and increase market awareness to support continued economic growth and long-term competitiveness.



The Business Leader Respondent Profile

69%
**ARE YOUNG
BUSINESS LEADERS.**
AGES 25-44



2 OUT
OF **3**

**have been living
in the Midlands
for 10+ years.**

TOP OBSTACLES IN THE MIDLANDS:



market
awareness



access to capital
and supply chain



transportation
and roads

99%

SAY THEIR SATISFACTION
WITH THE MIDLANDS
HAS STAYED THE SAME
OR IMPROVED.

20%

say there is more
improvement in business.

46%

say they have visited or
attended neighborhood
events in the past 12 months.

Behind the Sentiment



Business-friendly
policies have encouraged
long-term investment.”



The area’s reputation
has grown, attracting
new investment and
development.”



The Midlands has a better environment,
better agriculture, better economy and
close people to interact with.



92%

consider the Midlands
much better or better than
other regions they have
lived in or considered.

TOP MENTIONS FOR COMPARISON:

Atlanta, GA
Charleston, SC
Charlotte, NC
Greenville, SC
Chicago, IL



The Leader Angle

PERCENTAGE OF LEADERS THAT SAY THEY SEE PROGRESS



Two Sides of The Midlands

The sentiment survey data shows a perception gap between business leaders and the people who live and work in the Midlands. These differences highlight the need to better understand experiences and opportunities for action.

91%

of business leaders say the Midlands has **reasonable childcare availability**, while only

49%

of residents agree.



OPPORTUNITY FOR ACTION:

Consider offering a childcare stipend and/or explore more realistic options for employees.

91%

of business leaders say the Midlands offers **quality job opportunities**, while only

57%

of students agree.



OPPORTUNITY FOR ACTION:

Consider expanding business outreach programs to increase attendance at Midlands job fairs to narrow this gap.

Offer internships and utilize existing programs, like Capture Columbia, that help showcase the variety of industries and quality of life in the Midlands.



Elevating Your Message

Across the board, respondents identified **social media as a primary resource** for learning about local events and happenings throughout the Midlands. With this in mind, social media should be a central tool for connecting the region's diverse audiences with information about the people, opportunities and initiatives shaping the Midlands.

Primary resources for local events

Students

- 1 Social media
- 2 Word of Mouth
- 3 University News

Residents

- 1 Social media
- 2 Word of Mouth
- 3 Local News

Business Leaders

- 1 Social media
- 2 Local News
- 3 Word of Mouth

A photograph of three people (two men and one woman) sitting at a wooden picnic table outdoors. They are all smiling and holding glasses of beer. The setting appears to be a park or a waterfront area with trees and a body of water in the background. The image is partially overlaid by a large teal graphic on the right side.

Elevating Your Next Chapter

The Midlands invests in the future of its workforce and economy through initiatives that support small-business growth, career and technical education, and access to affordable workforce housing.

Investing in the Future

Why Students Should Stay

Top 100 Best Places to Live in the US in 2025

Livability.com

COR's Capture Columbia

Why You Should Move Here

Top 100 Best Places to Live in the US in 2025

Livability.com

Fastest Growing State in U.S. (by net percentage)

Columbia Business Monthly

Why You Should Start a Family Here

Top Housing Markets for 2026

Realtor.com

New Housing Developments

Why You Should Work Here

Wallet Hub Best Cities to Start a Career

WalletHub

COR's Crash Course Columbia

Leadership Columbia

Bridging Columbia

Why You Should Invest in Your Future Here

Thrive 25 Small Biz Conference

Heyward Career and Technology Center

SC Housing launches workforce housing initiative

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Elevate Midlands

The Midlands Regional Competitiveness Council is a group of over 25 business and community leaders who volunteer countless hours to to elevate the Midlands through the creation of this report. They and our sponsors make this all possible. Please use it to drive change in your communities and workplaces.