



16th Annual

State of the Community Report

September 14, 2022

Presented By



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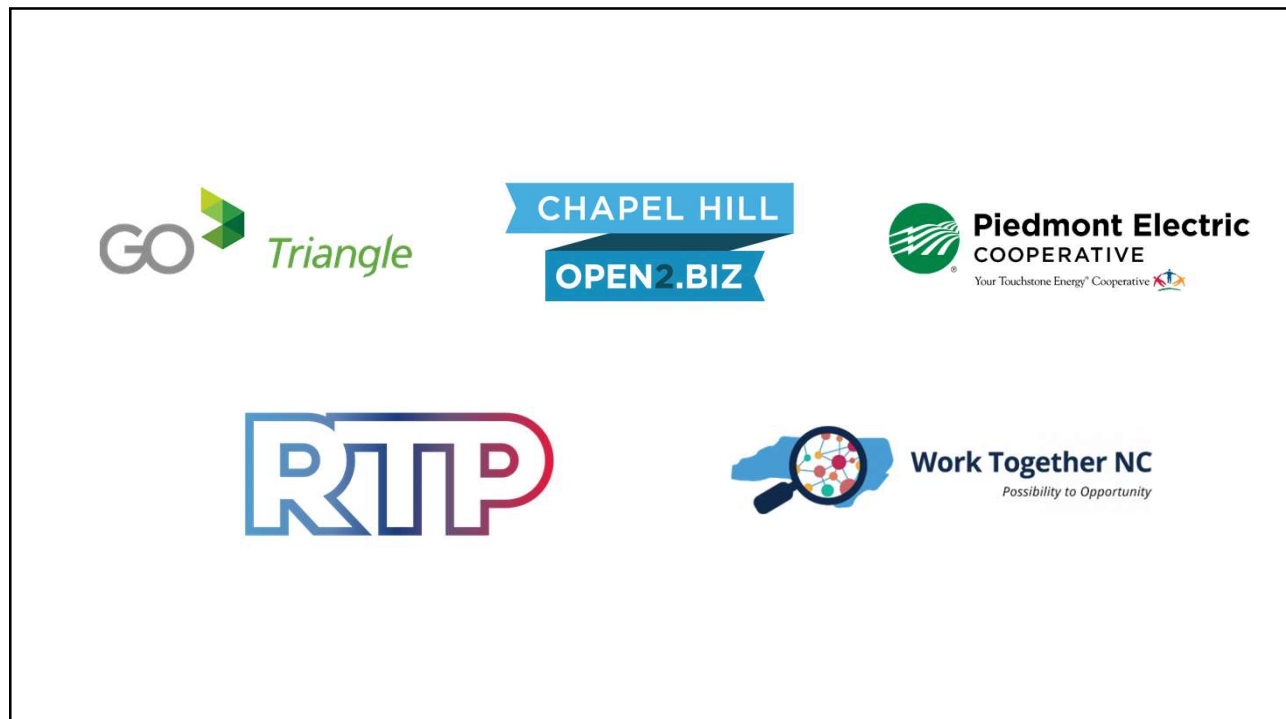
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2023 Data Partners

CAROLINA
DEMOGRAPHY


ORANGE COUNTY
NORTH CAROLINA


TOWN OF CARRBORO • NC



 TOWN OF
HILLSBOROUGH
NORTH CAROLINA

 **The Partnership**
For a Greater Chapel Hill-Carrboro

5



Janet Hadar
President

UNC
HEALTHSM

#DataDive2023

6

UNC Hospitals Community Outreach Activities

Janet Hadar, President, UNC Hospitals

September 14, 2023



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Community Partners



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Education

- **Stuff the Bus collection drive**
- **Scholarships for Blue Ribbon Students**
- **Project graduation**



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Food Insecurity

- + One Great Food Drive
- + FoodWell program
- + Meals on Wheels



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Affordable Housing

- + \$5 million for Chapel Hill
- + Community Home Trust
- + EMPOWERment
- + Habitat builds



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Access to Services

- \$63.1M in Charity Care
- Screenings/Health Education
- SECU Family House & Ronald McDonald House



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Staying Connected

- Chapel Hill Downtown Partnership
- Community Events
- Chambers of Commerce



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Equity & Inclusion

- + Minority Health Conference
- + Chapel Hill NAACP's 75th anniversary events
- + UNC Health Pride Walk



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Thank you



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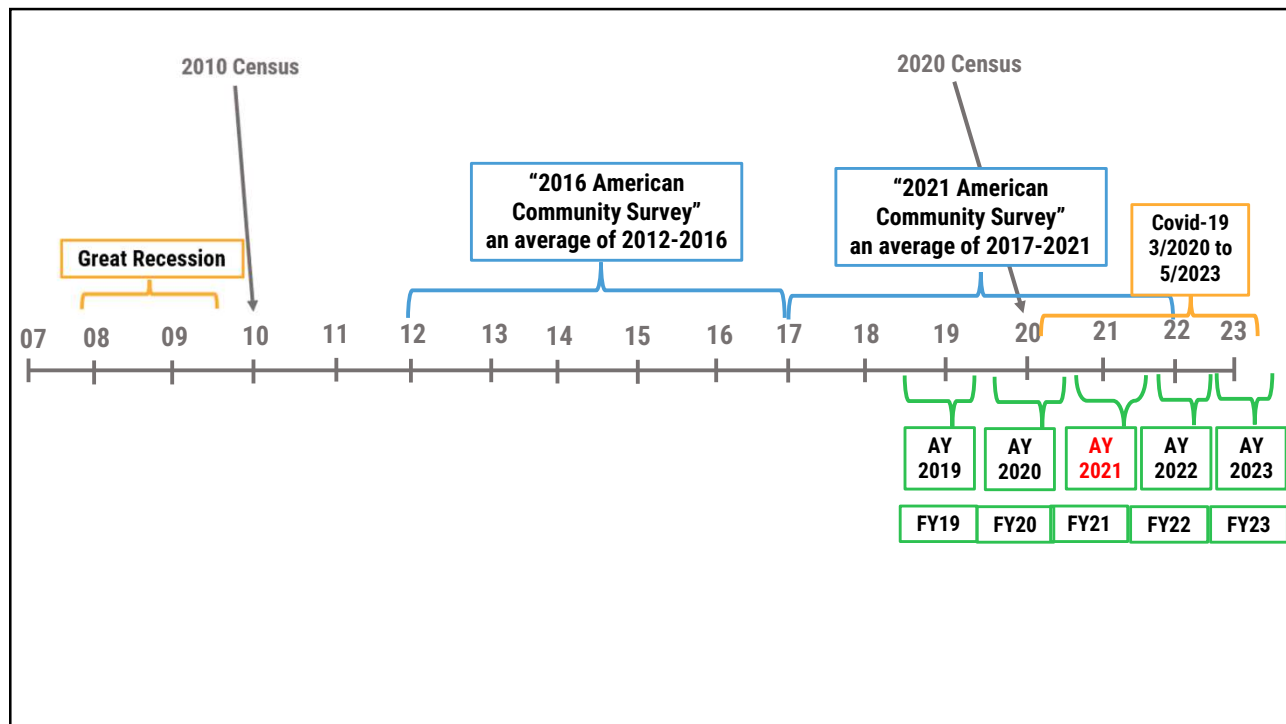
2023

State of the Community Report

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The Timeline

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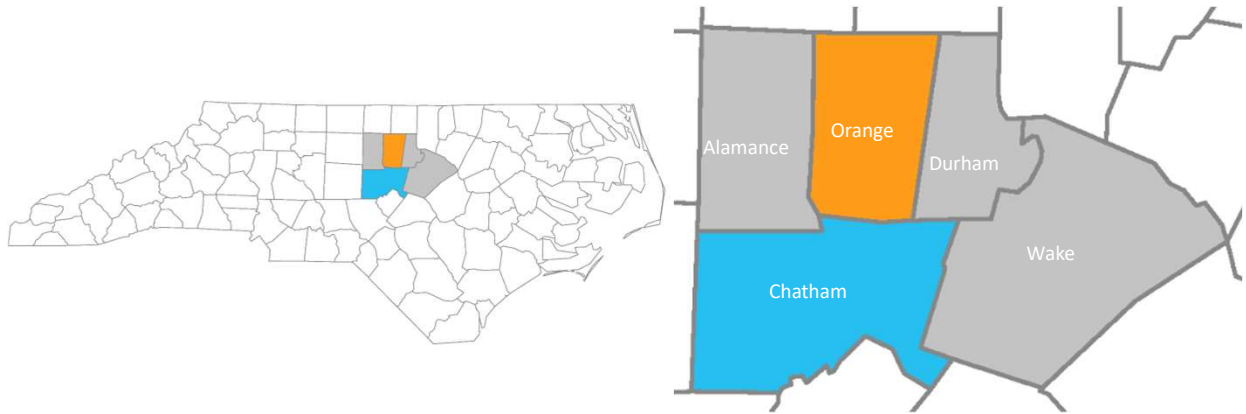


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Geography

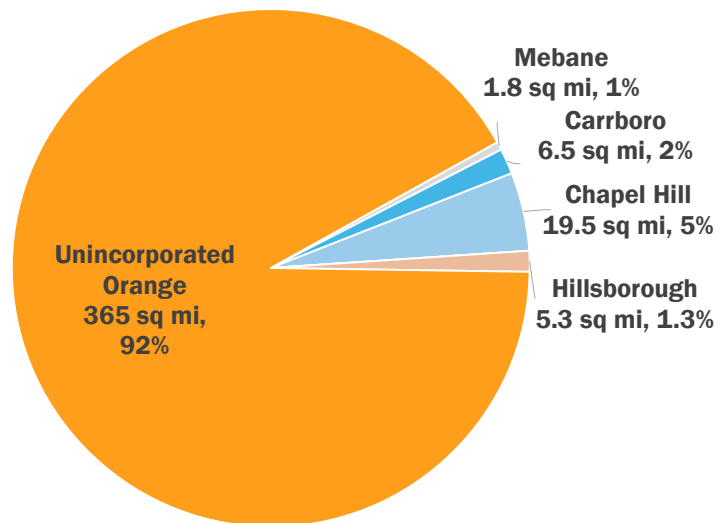
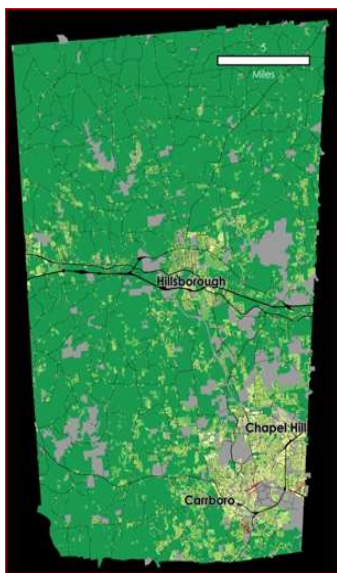
20

Orange County + Chatham County + Neighbors



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Orange County

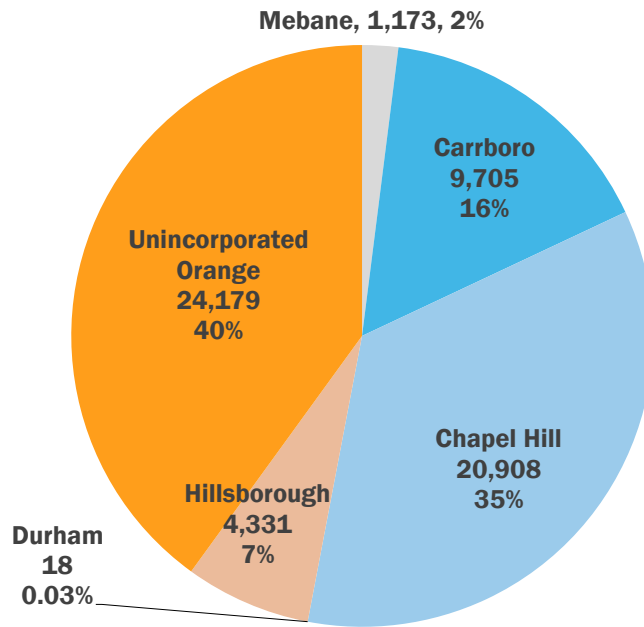


Source: American Community Survey (2017-2021 5-Year Estimates)

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Orange County housing unit breakdown

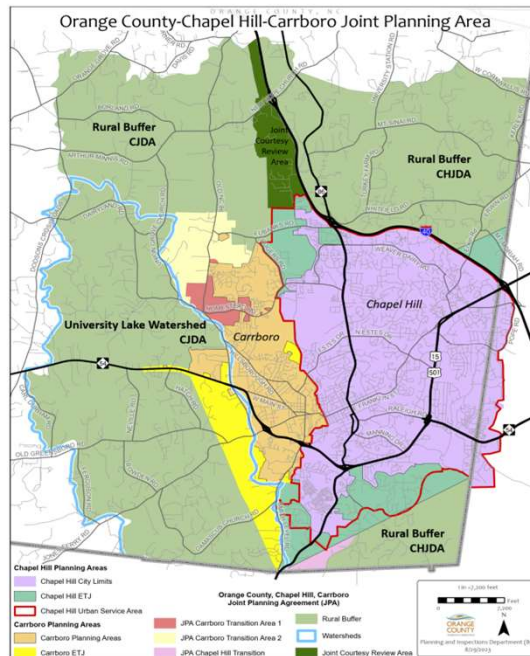
60,314 total housing units



Source: American Community Survey (2017-2021 5-Year Estimates)

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Orange County's Rural Buffer



Source: American Community Survey (2017-2021 5-Year Estimates)

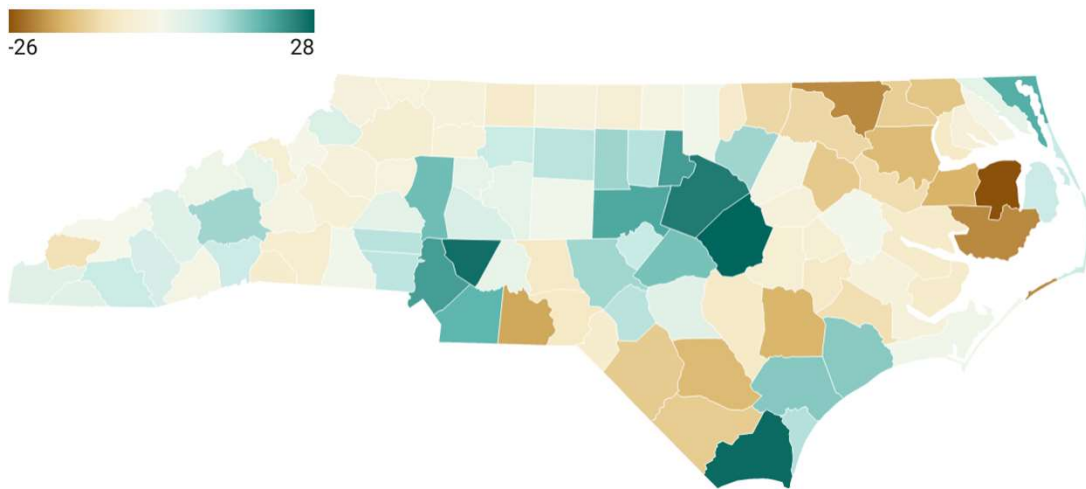
24

Population Growth 2010-2020

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Fastest Growth in Triangle, Charlotte, Wilmington

Population growth rate (%) for NC counties, 2010-2020



Source: US Census Bureau

26

Chapel Hill and Carrboro grew <1% per year, Hillsborough grew an average of 4.6% per year from 2010 to 2020

2010 and 2020 population totals, growth rate over the decade, & local annual growth rates

	2010	2020	Percent Growth 2010 to 2020	Annual Growth Rate
Orange County	133,801	148,696	11%	1.1%
Hillsborough	6,087	9,660	59%	4.6%
Carrboro	19,582	21,295	9%	0.8%
Chapel Hill	57,233	61,960	8%	0.8%
Chatham County	63,505	76,285	20%	1.8%
North Carolina	9,535,483	10,439,388	9%	0.9%

Source: US Census Bureau

27

Chapel Hill and Carrboro grew <1% per year, Hillsborough grew an average of 4.6% per year from 2010 to 2020

2010 and 2020 population totals, growth rate over the decade, & local annual growth rates

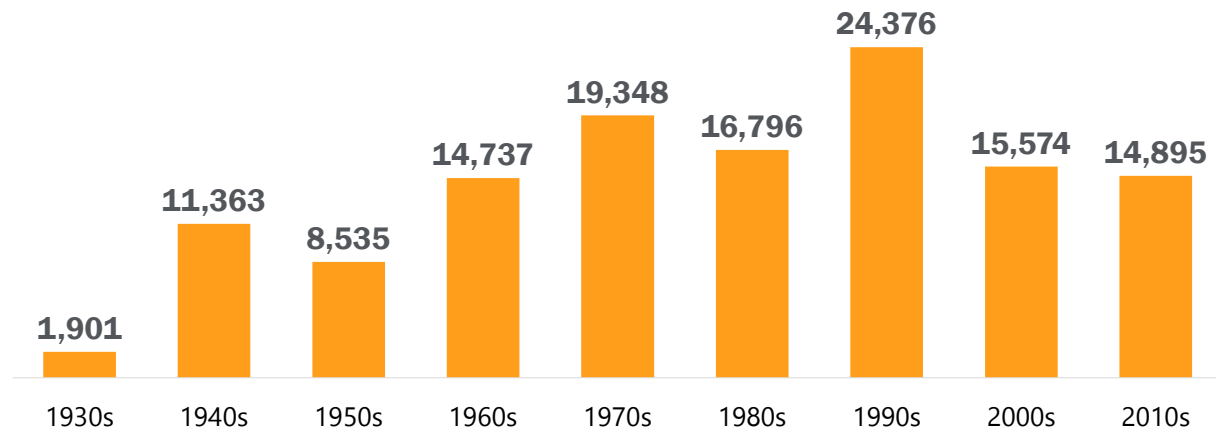
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Chatham County	63,505	76,285	20%	1.8%
North Carolina	9,535,483	10,439,388	9%	0.9%

Source: US Census Bureau

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Orange County 2010s population increase similar to growth in the 1960s

Numeric population growth by decade, 1930-2020

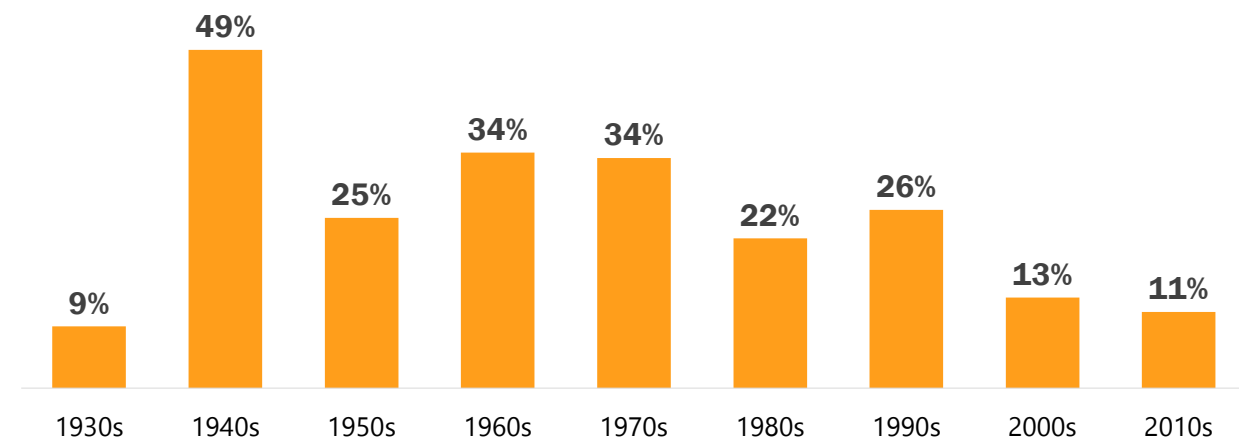


Source: US Census Bureau Decennial Census

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2010s Orange County's second slowest decade of growth on record

Percent population increase by decade, 1930-2020

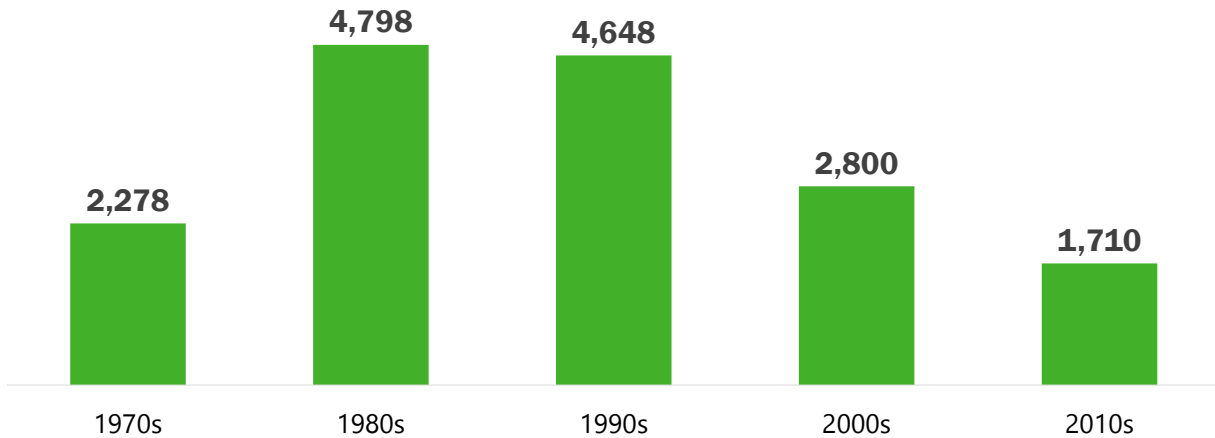


Source: US Census Bureau Decennial Census

30

2010s Carrboro's smallest decade of growth since 1970s

Numeric population growth by decade, 1970-2020

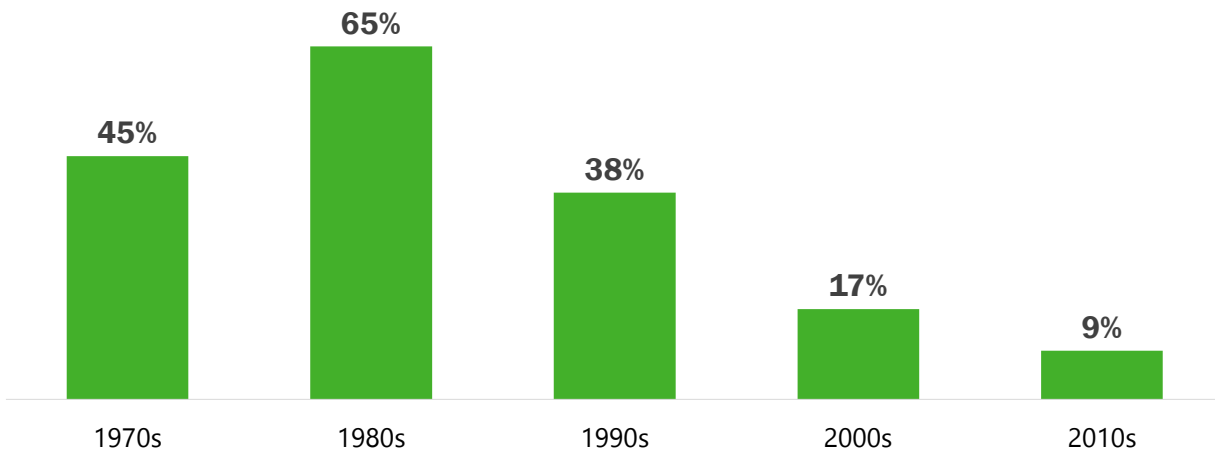


Source: US Census Bureau Decennial Census

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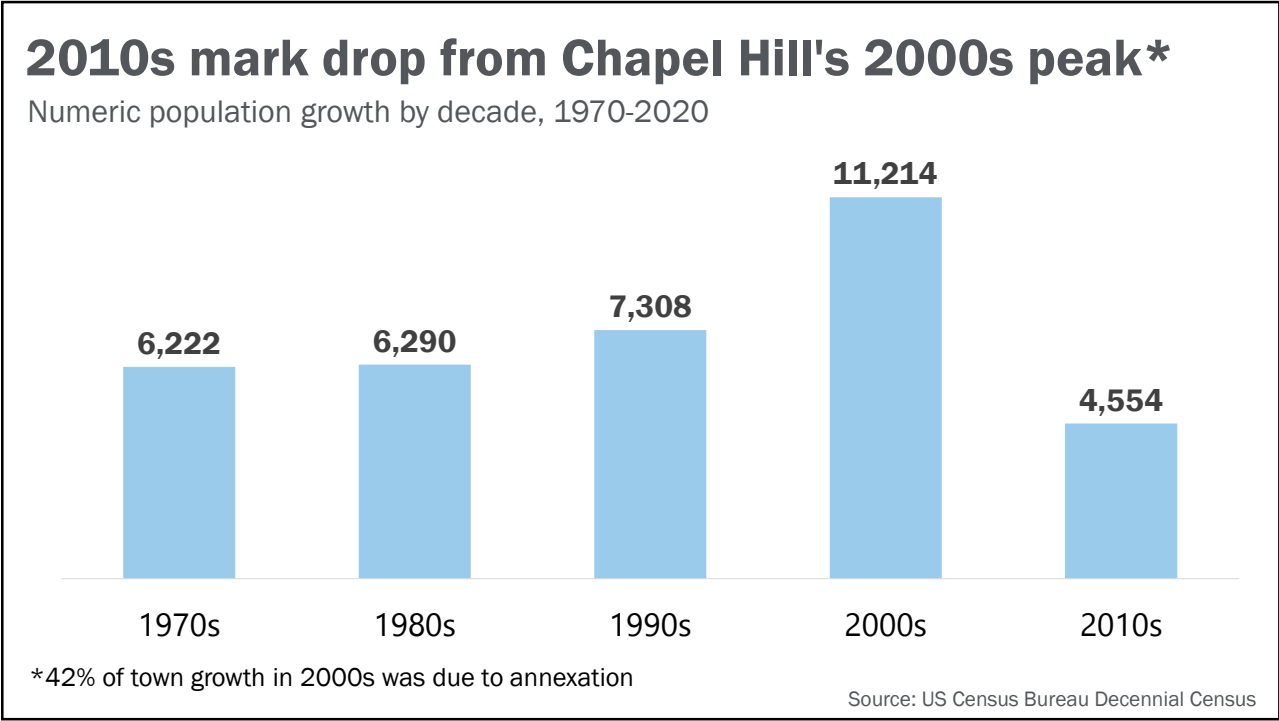
2010s slowest growing decade for Carrboro since 1970s

Percent population increase by decade, 1970-2020

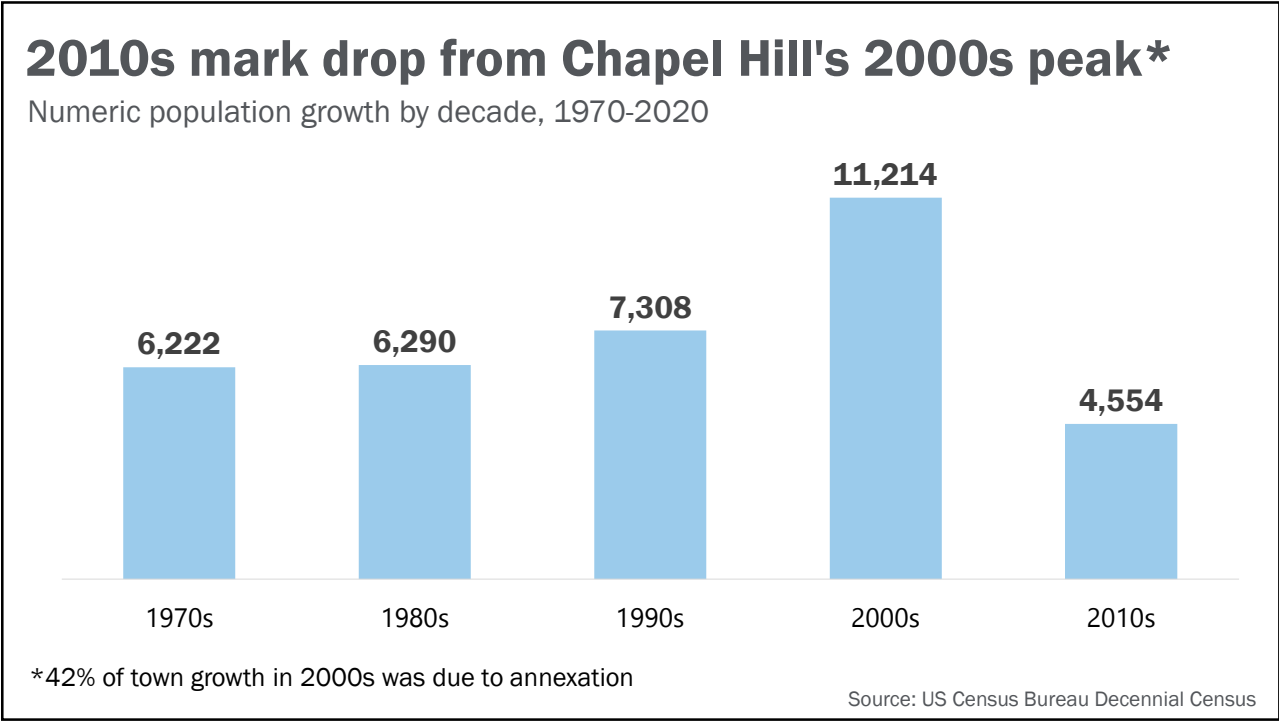


Source: US Census Bureau Decennial Census

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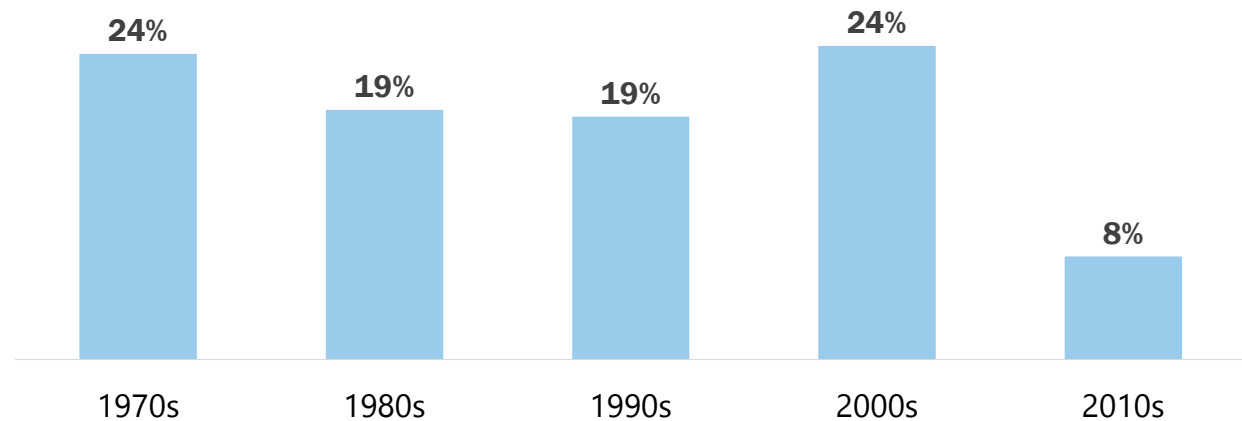
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2010s slowest growing decade for Chapel Hill since 1970s

Percent population increase by decade, 1970-2020



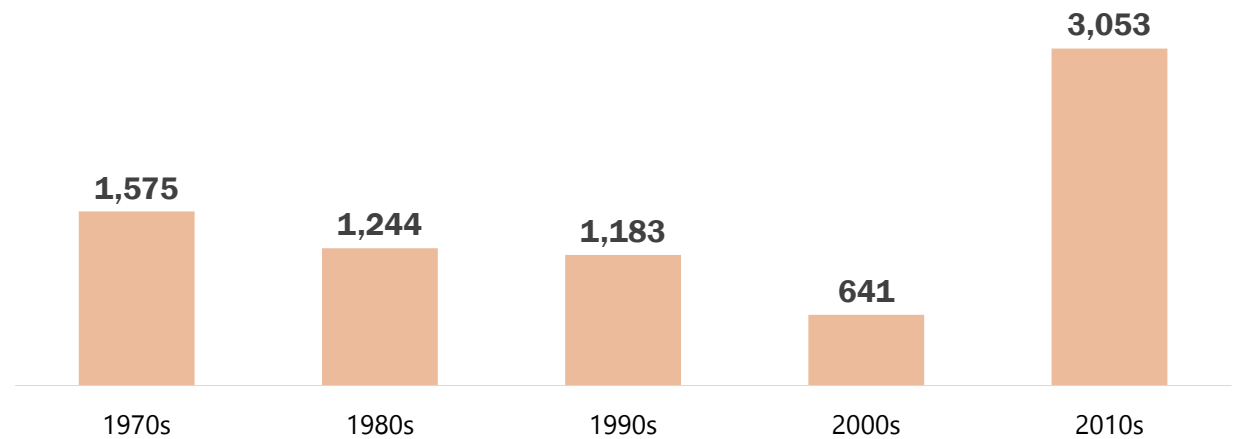
*42% of town growth in 2000s was due to annexation

Source: US Census Bureau Decennial Census

35

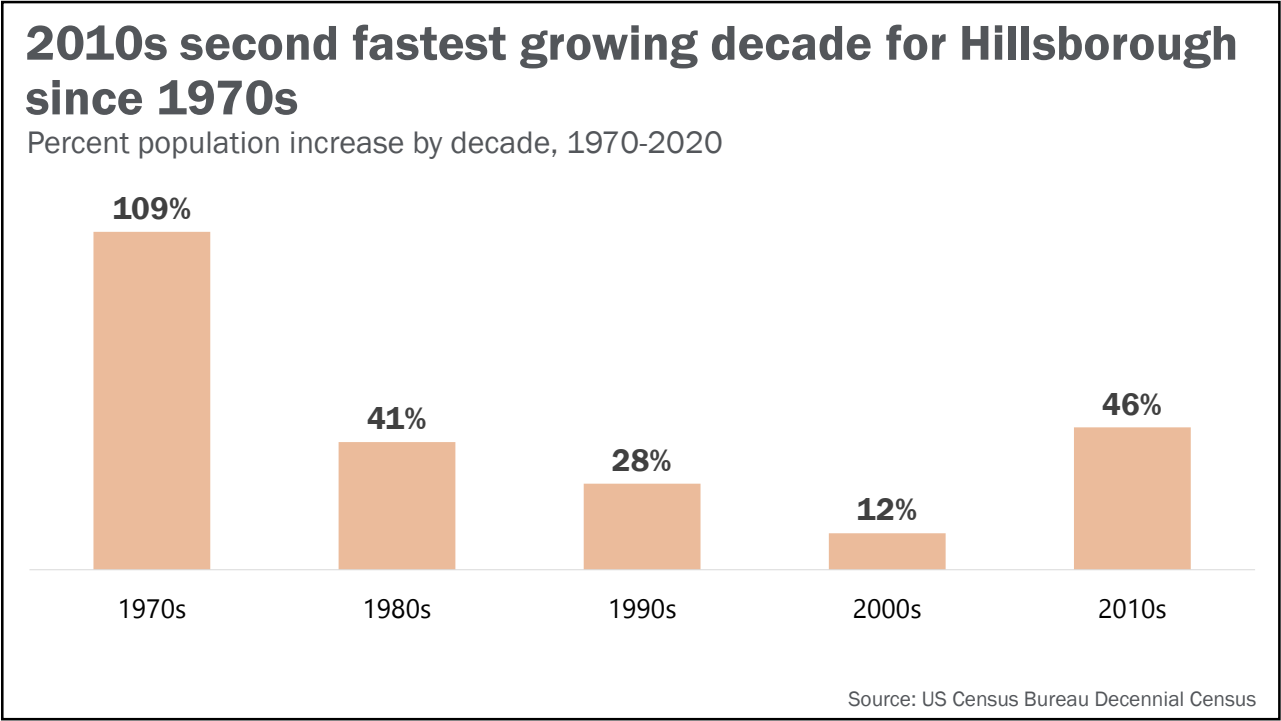
Hillsborough's 2010s population growth largest since 1970s

Numeric population growth by decade, 1970-2020



Source: US Census Bureau Decennial Census

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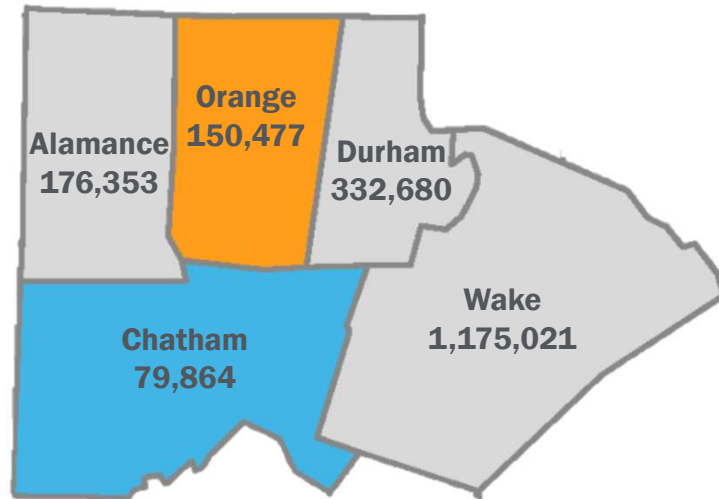
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2022 county population totals

North Carolina population: 10,698,973

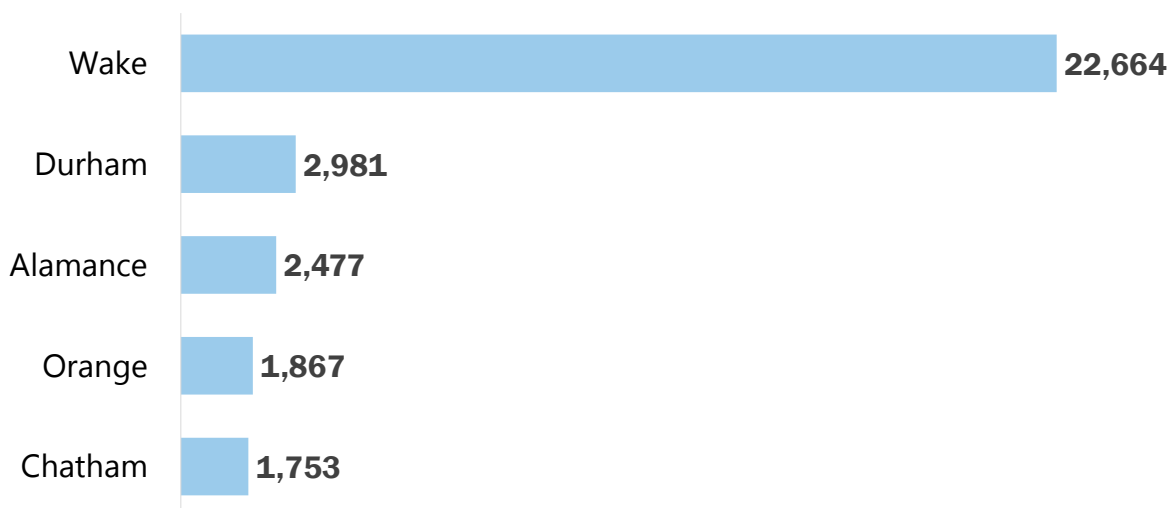


Source: US Census Bureau Decennial Census

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County numeric population change 2021-2022

Numeric population growth, 2021 to 2022 (NC added 133,088 people in same period)

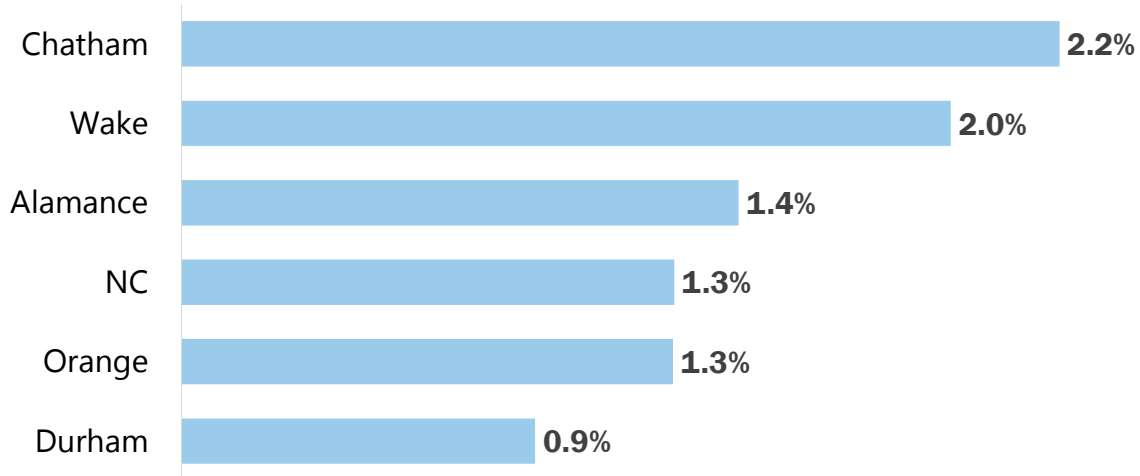


Source: US Census Bureau Decennial Census

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Chatham grows fastest among peer counties in 2022

Percentage population growth from 2021 to 2022

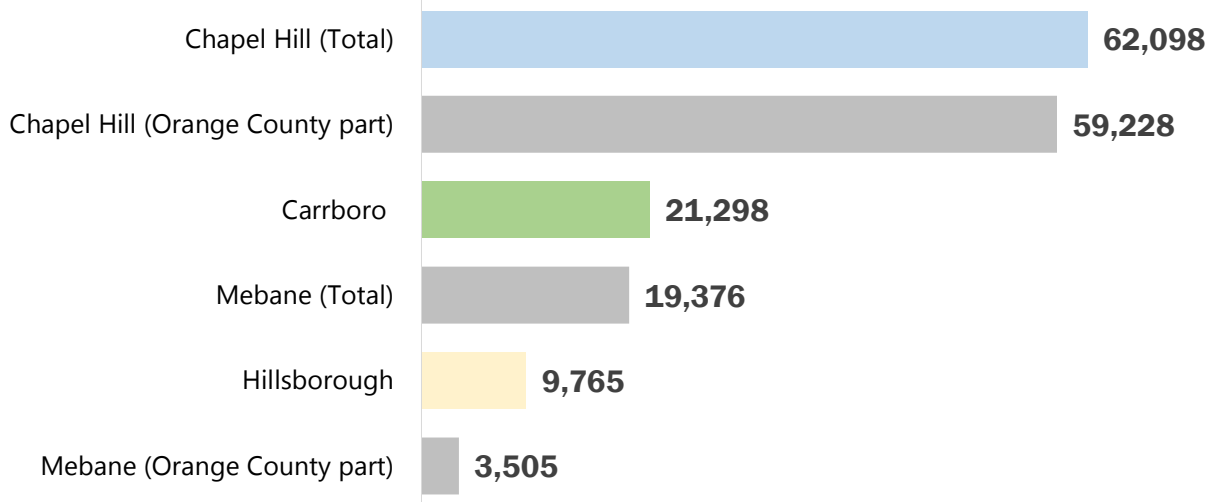


Source: US Census Bureau Decennial Census

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2022 municipal populations

Population of Orange County municipalities, 2022

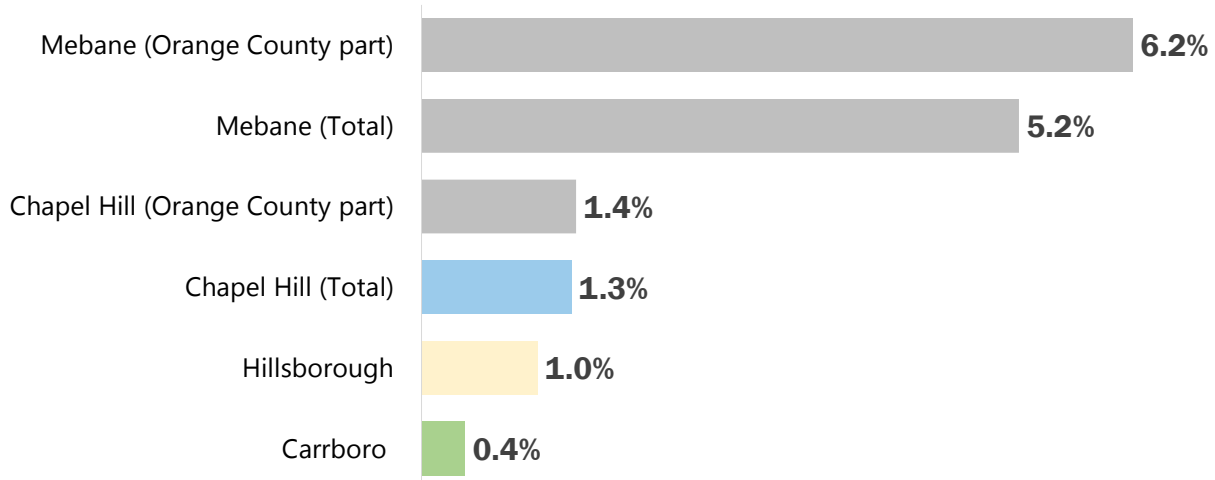


Source: Decennial Census and Census Population Estimates

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Municipal population change

Percent change in population of Orange County municipalities, 2021 to 2022

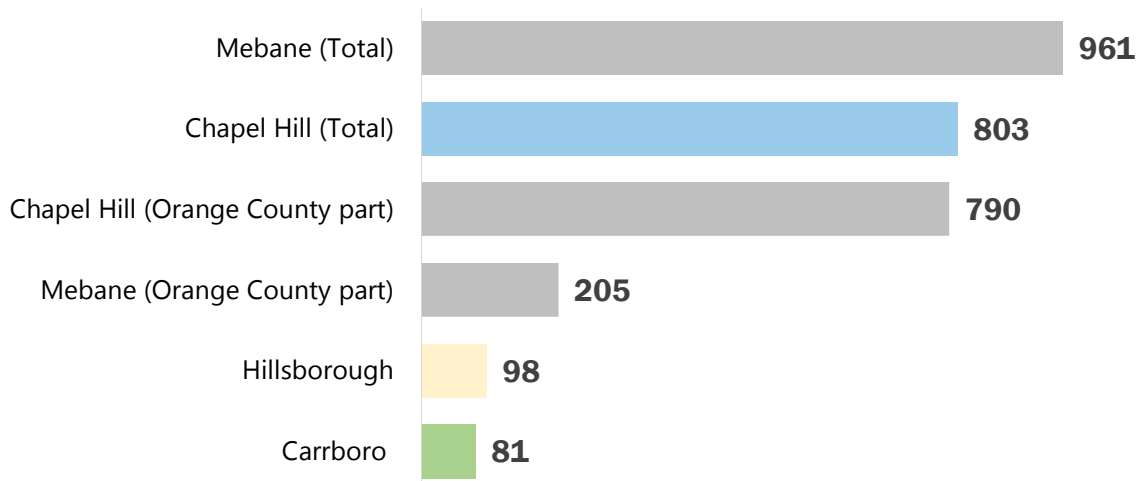


Source: Decennial Census and Census Population Estimates

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Municipal population change

Numeric change in population of Orange County municipalities, 2021 to 2022

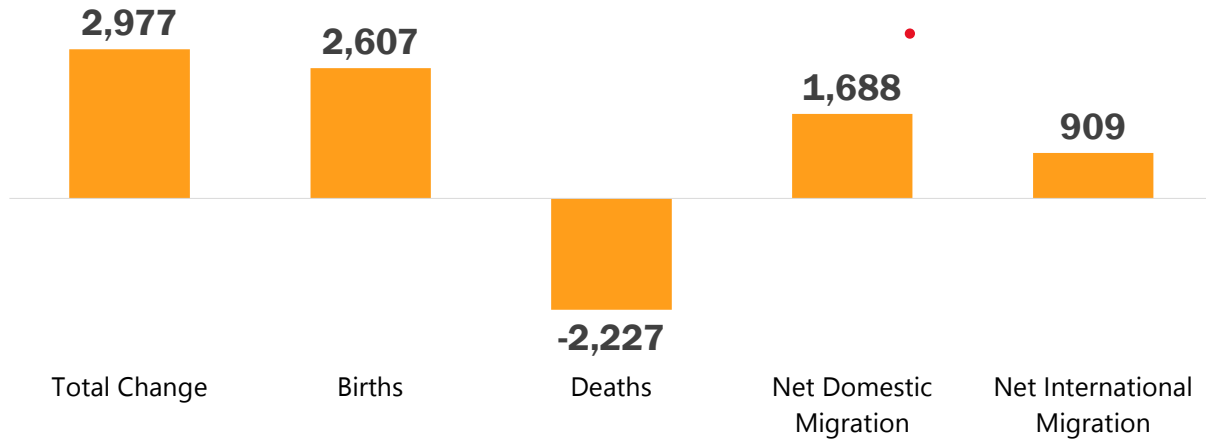


Source: Decennial Census and Census Population Estimates

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Orange County components of population change

Components of Orange County's estimated 2,977-person growth, 2020 to 2022

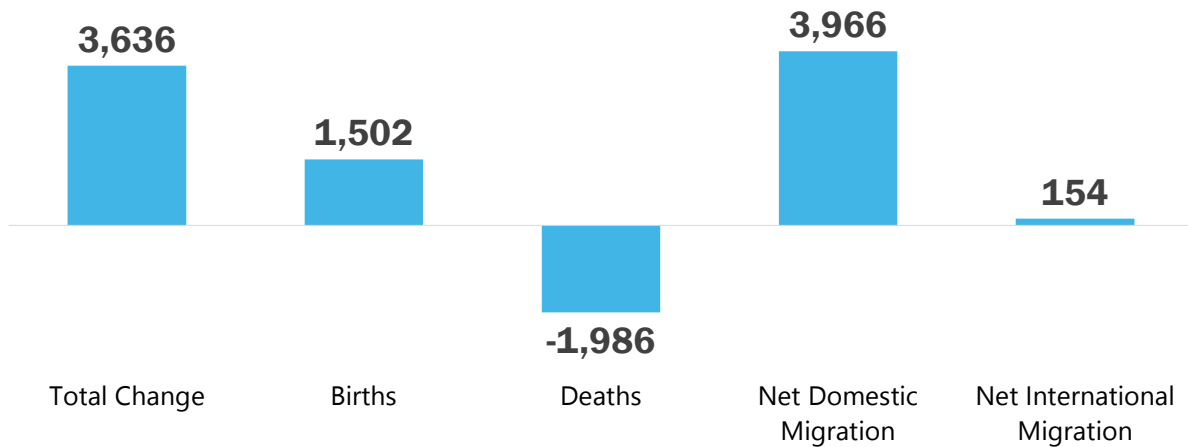


Source: US Census Bureau Population Estimates

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Chatham County components of population change

Components of Chatham County's estimated 3,636-person growth, 2020 to 2022



Source: US Census Bureau Population Estimates

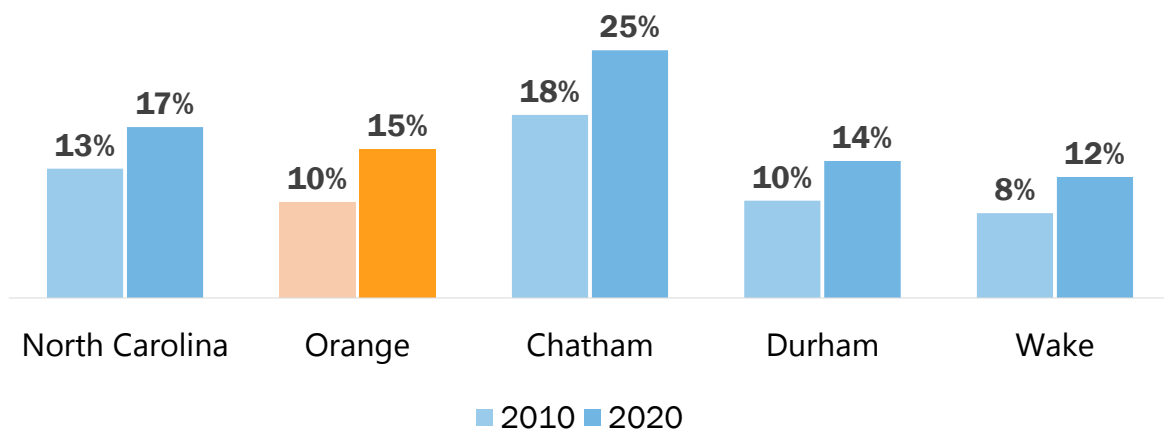
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Seniors (over the decade)

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Share of residents 65 years and older has increased in the past decade

Population proportion 65+, April 1, 2010 vs. April 1, 2020

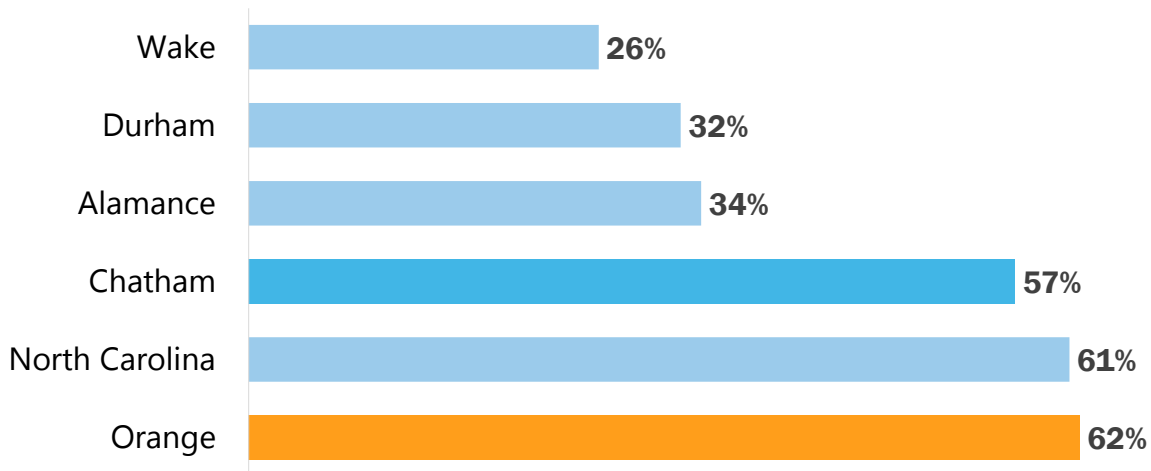


Source: US Census Bureau Population Estimates

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Increases in 65+ population drove NC, county growth

Share of 2010-2020 population growth due to 65+ growth

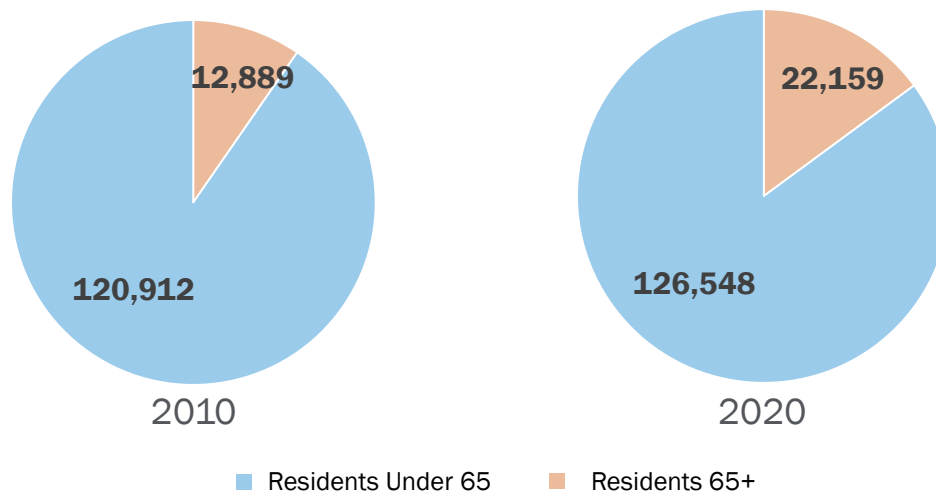


Source: US Census Bureau Population Estimates

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Orange County has 9,500 more seniors in 2020 than 2010, now 15% of the county population

Population by age bands, April 1, 2010 vs. April 1, 2020



Source: US Census Bureau Population Estimates

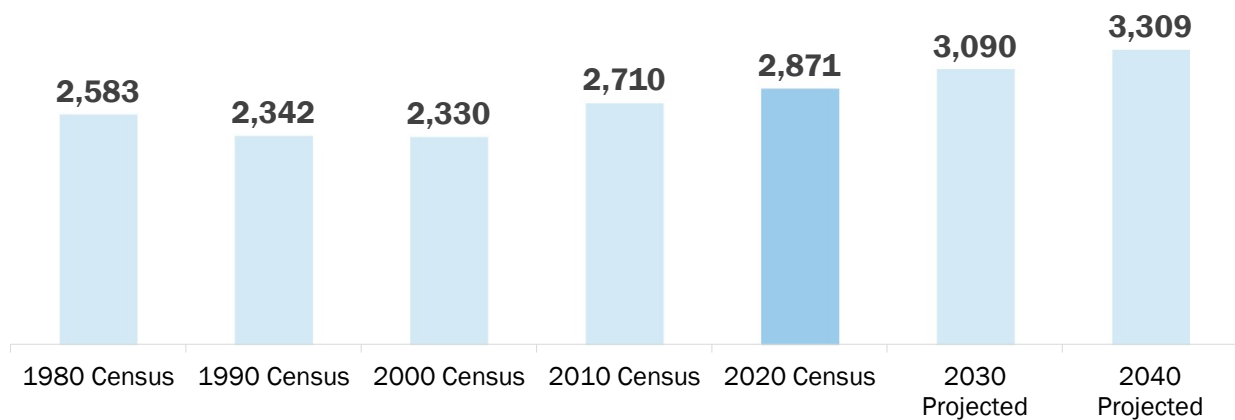
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Population Density

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Chapel Hill projected population density

Population per square mile, projecting with linear 2010-2020

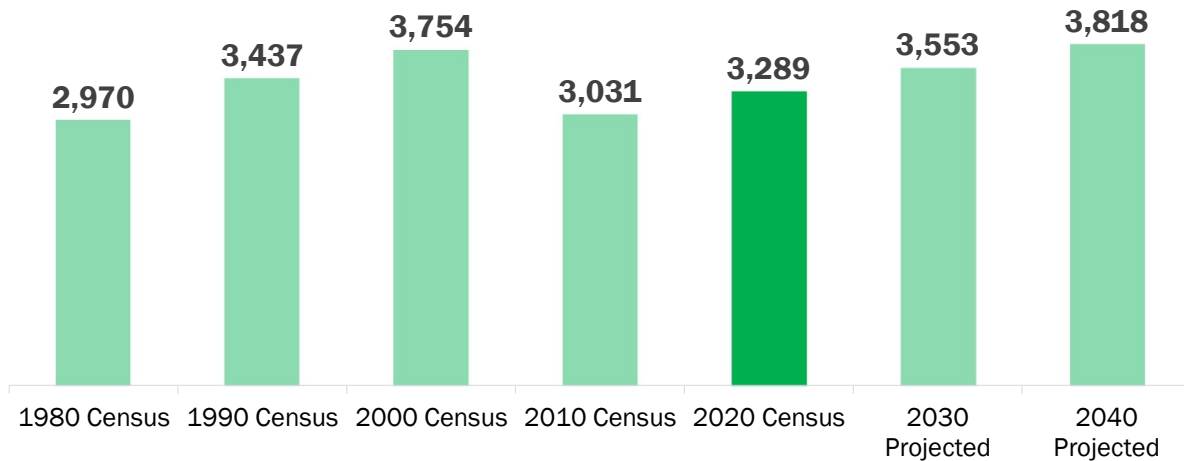


Source: Decennial Census; projections by Carolina Demography

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Carrboro projected population density

Population per square mile, projecting with linear 2010-2020

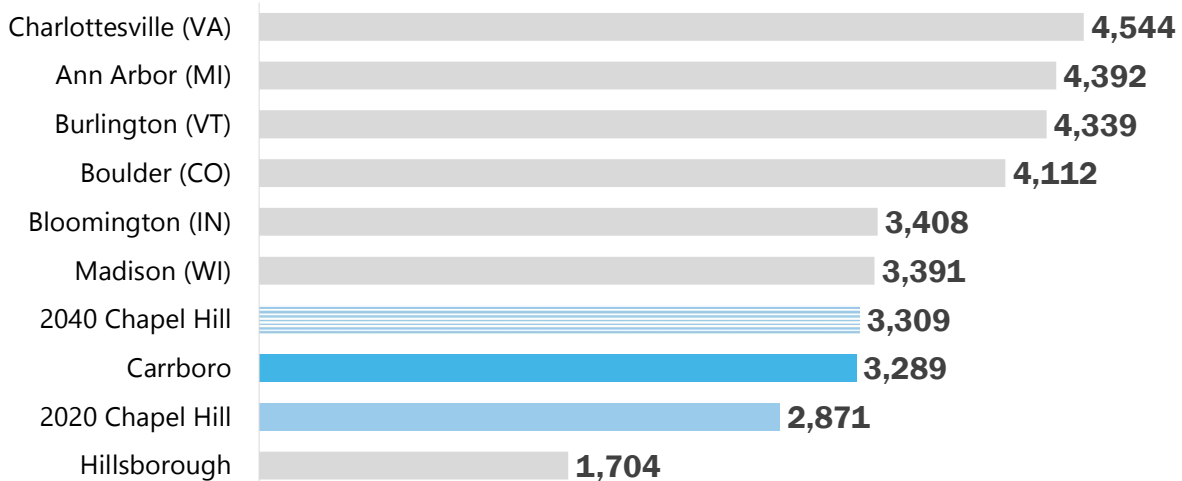


Source: Decennial Census; projections by Carolina Demography

53

Chapel Hill less dense in 2040 than peer college towns in 2020

Population per square mile, 2020



Source: Decennial Census; projections by Carolina Demography

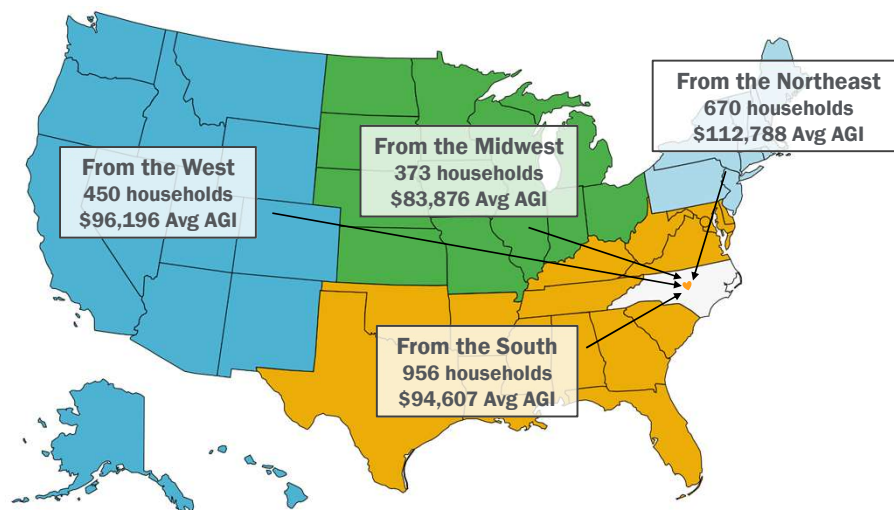
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Migration

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Domestic migration into Orange County

Household migration by region and average adjusted gross income (AGI), 2019-2020

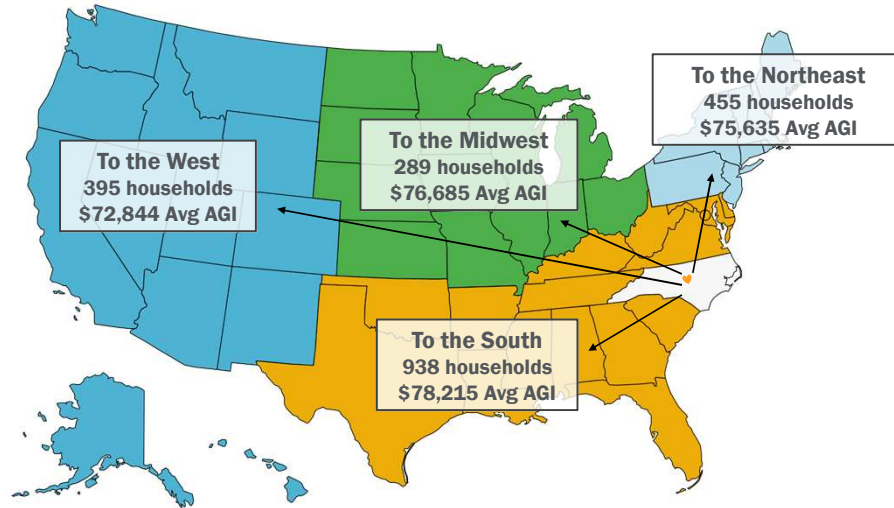


Source: IRS

56

Domestic migration out of Orange County

Household migration by region and average adjusted gross income (AGI), 2019-2020

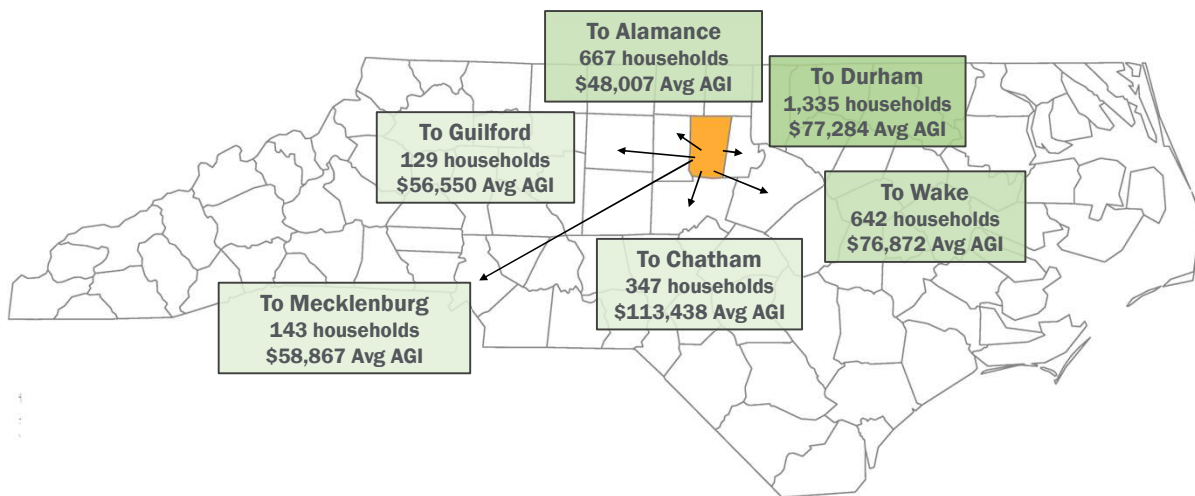


Source: IRS

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Migration out of Orange County

Household migration by county and average adjusted gross income (AGI), 2019-2020

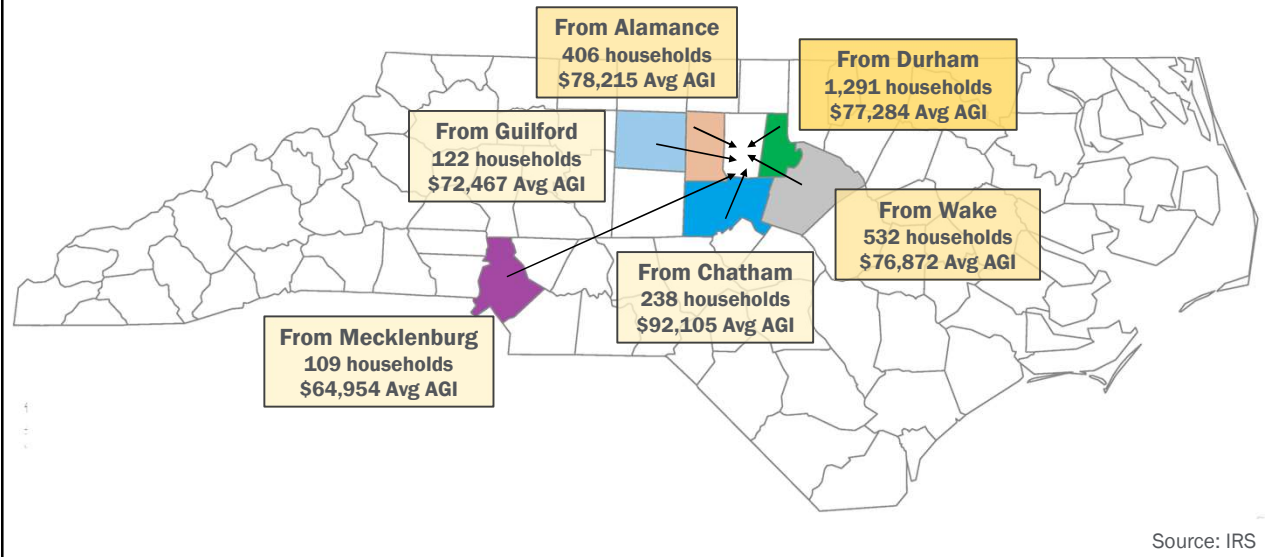


Source: IRS

58

Migration into Orange County

Household migration by county and average adjusted gross income (AGI), 2019-2020



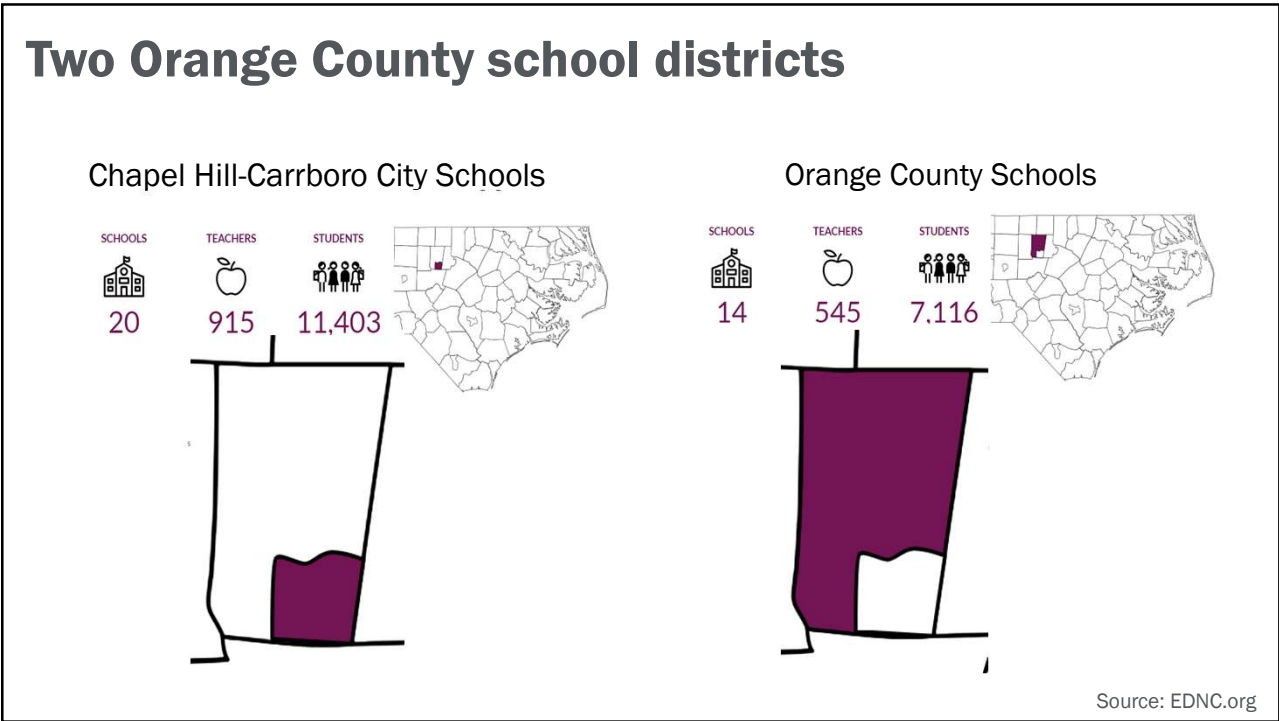
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Education

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2 Orange County School Districts

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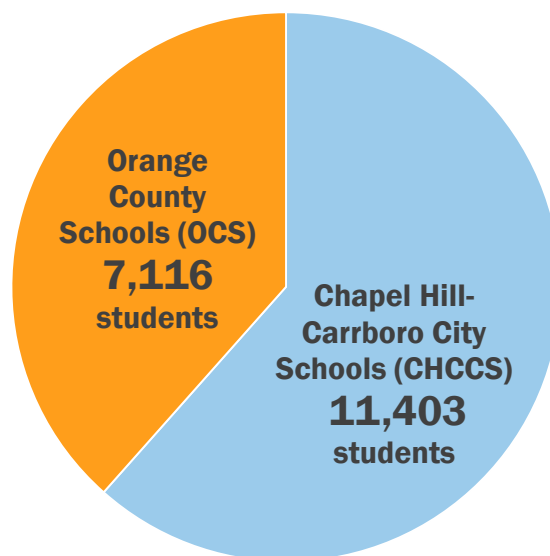


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Public School Enrollment

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Orange County school districts' enrollment

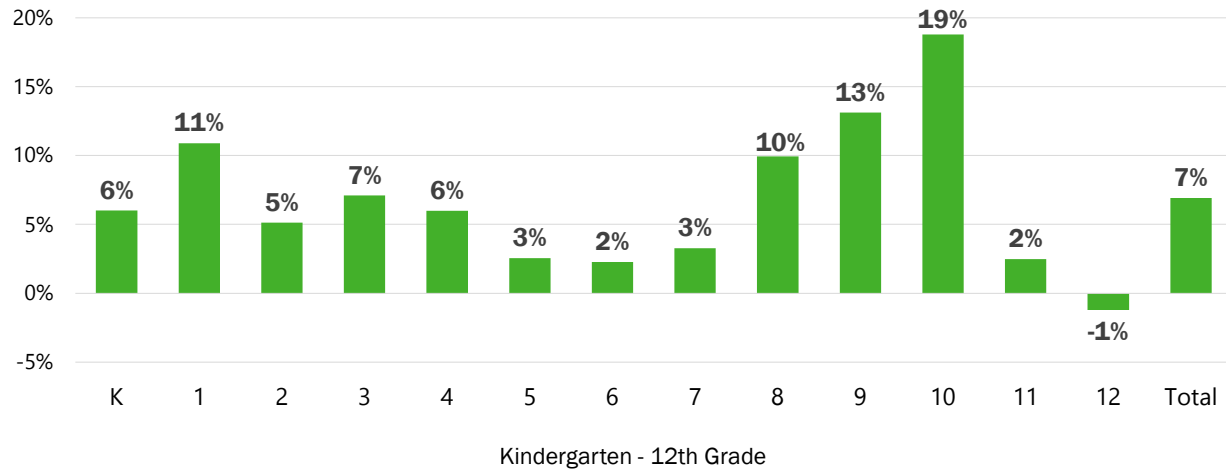


Source: NC Department of Public Instruction

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North Carolina public school enrollment change between AY2020 and AY2023

Percent increase/decrease in Average Daily Membership (ADM), AY2020 to AY2023

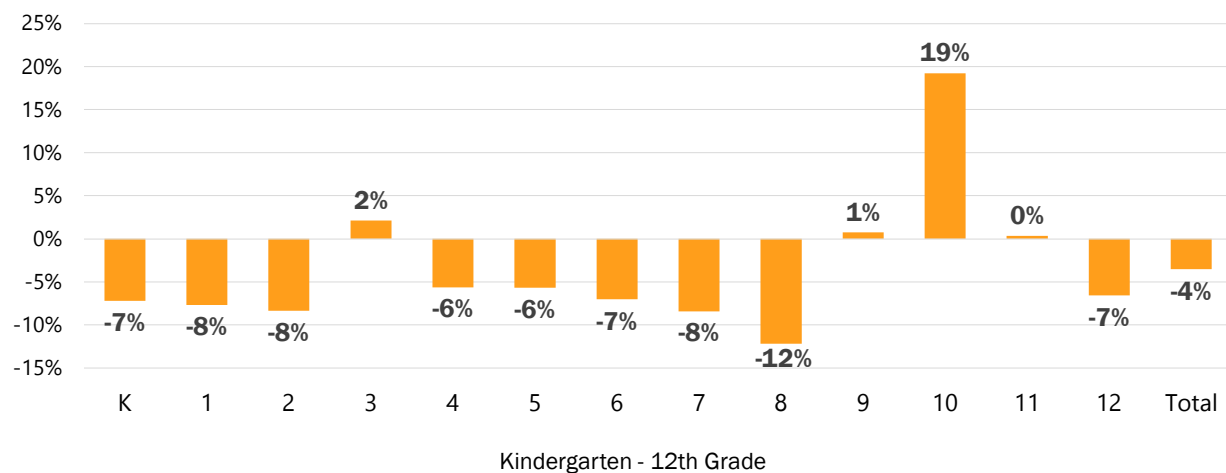


Source: NC Department of Public Instruction

65

Orange County Schools (OCS) enrollment change between AY2020 and AY2023

Percent increase/decrease in Average Daily Membership (ADM), AY2020 to AY2023

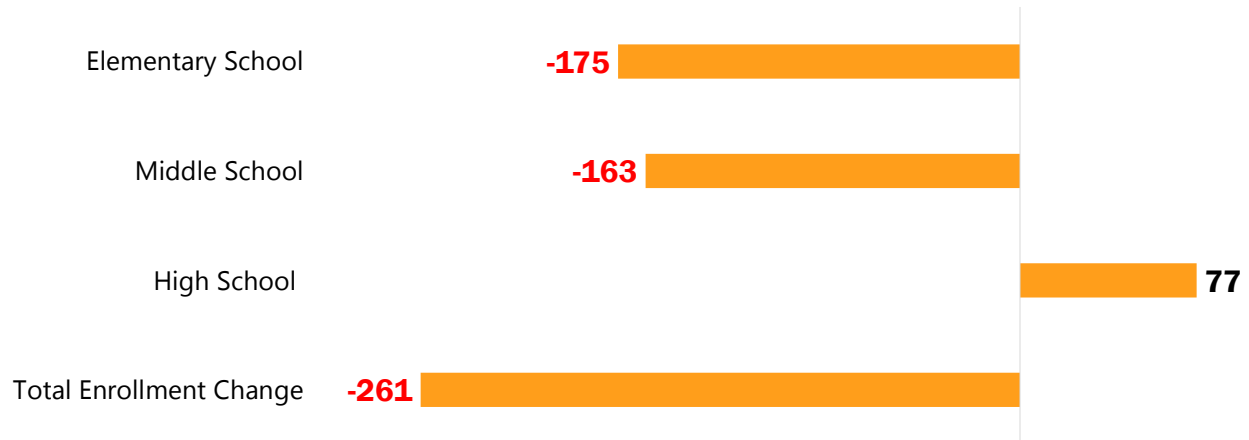


Source: NC Department of Public Instruction

66

Orange County Schools headcount (ADM) declines by 261 students (3.5%) from AY2020 to AY2023

Orange County Schools student increase/decrease in Average Daily Members (ADM) between AY2020 and AY2023

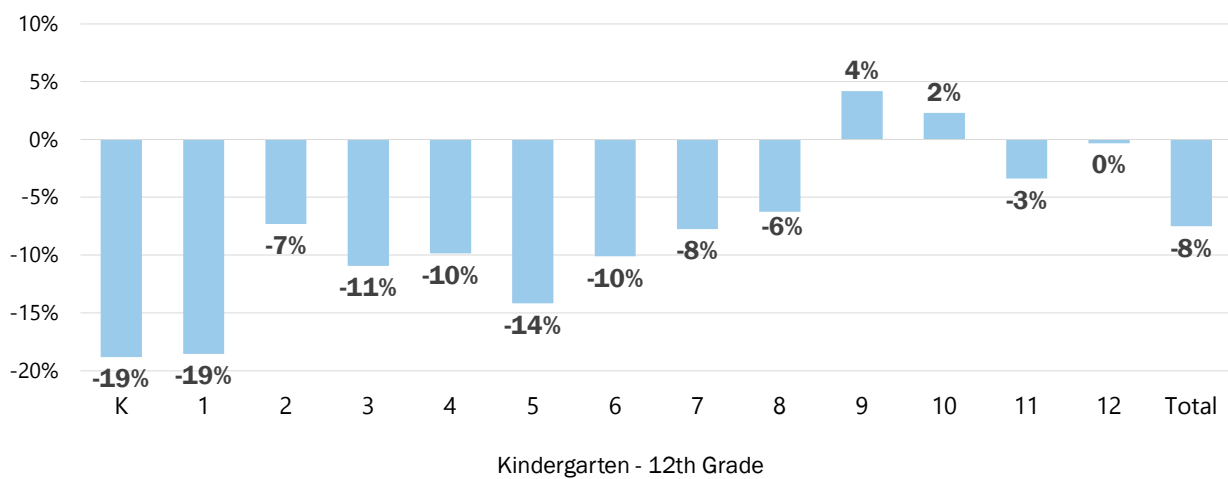


Source: NC Department of Public Instruction

67

Chapel Hill-Carrboro City Schools (CHCCS) enrollment change between AY2020 and AY2023

Percent increase/decrease in Average Daily Membership (ADM), AY2020 to AY2023

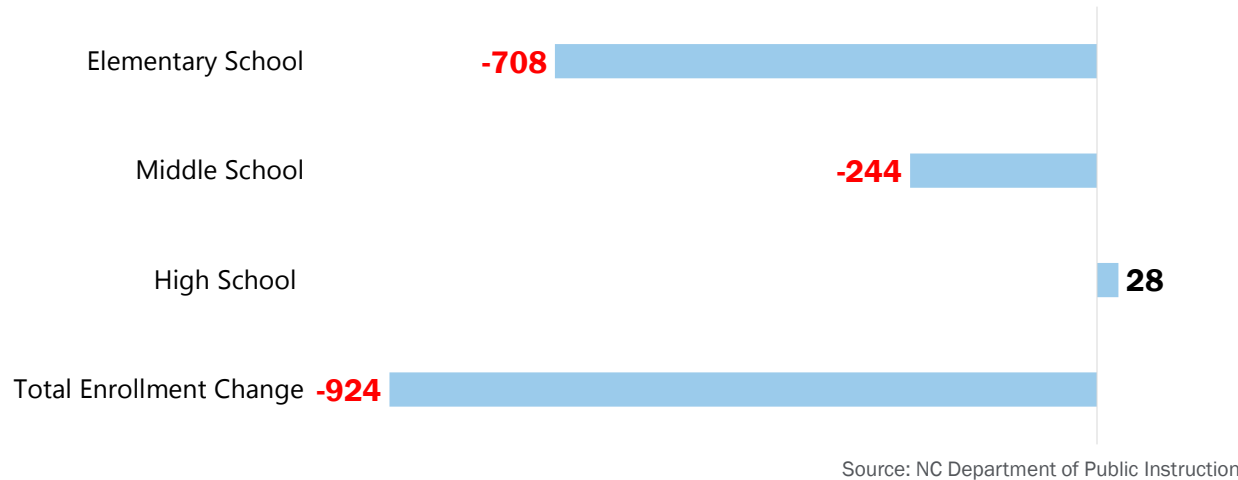


Source: NC Department of Public Instruction

68

CHCCS headcount (ADM) declines by 942 students (7.5%) between AY2020 to AY2023

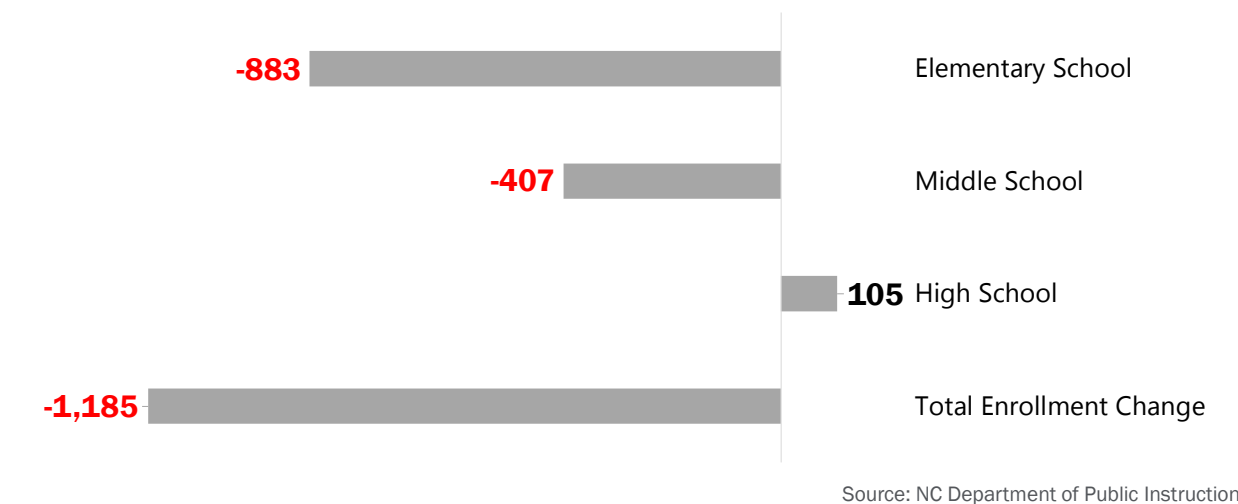
Chapel Hill-Carrboro City Schools student increase/decrease in Average Daily Members (ADM) between AY2020 and AY2023



69

Total combined Orange County public school headcount (ADM) declines by 1,185 students (6%) across both districts

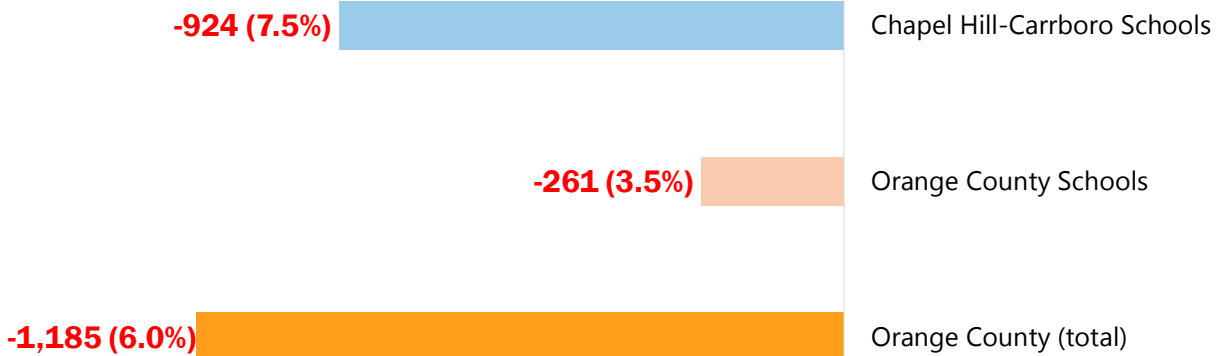
Combined Chapel Hill-Carrboro City Schools and Orange County Schools student increase/decrease in Average Daily Members (ADM) between AY2020 and AY2023



70

Student headcount declines from 2019-20 to 2022-23 school year

Student increase/decrease Average Daily Members (ADM) AY2020 to AY2023



Source: NC Department of Public Instruction

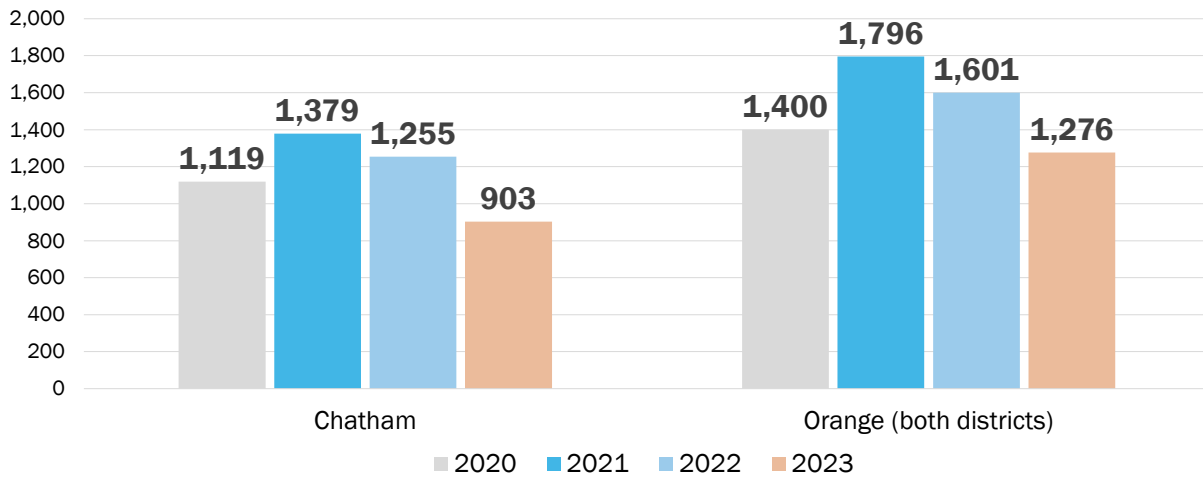
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Home Schools & Private Schools

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Home School enrollments by county

Number of students enrolled in home school, AY2020 – AY2023

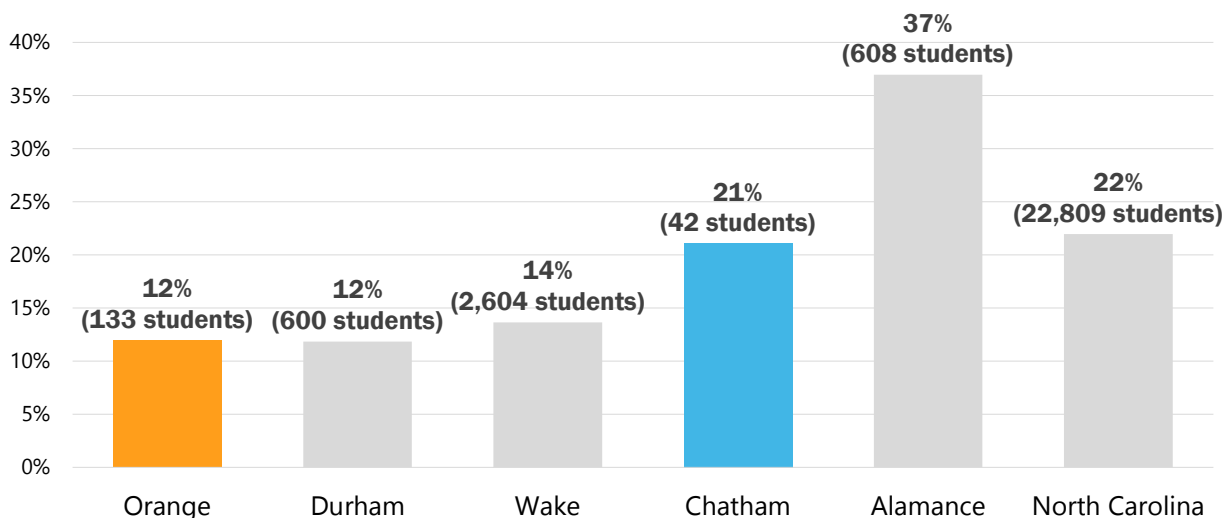


Source: NC Department of Administration

73

Change in Private School enrollment since 2020

Number and percent change in private school enrollments from AY2020 to AY2023



Source: NC Department of Administration

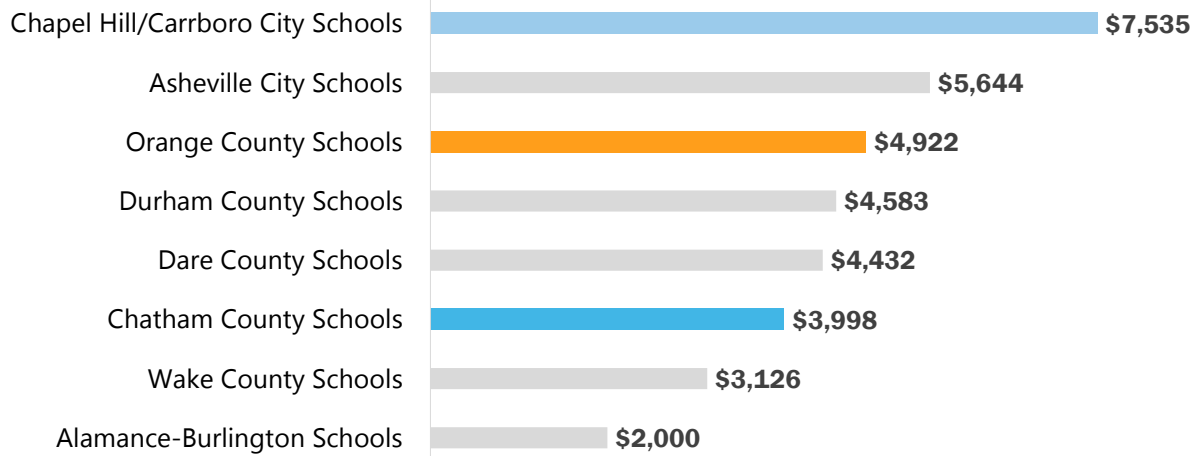
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Public School Funding

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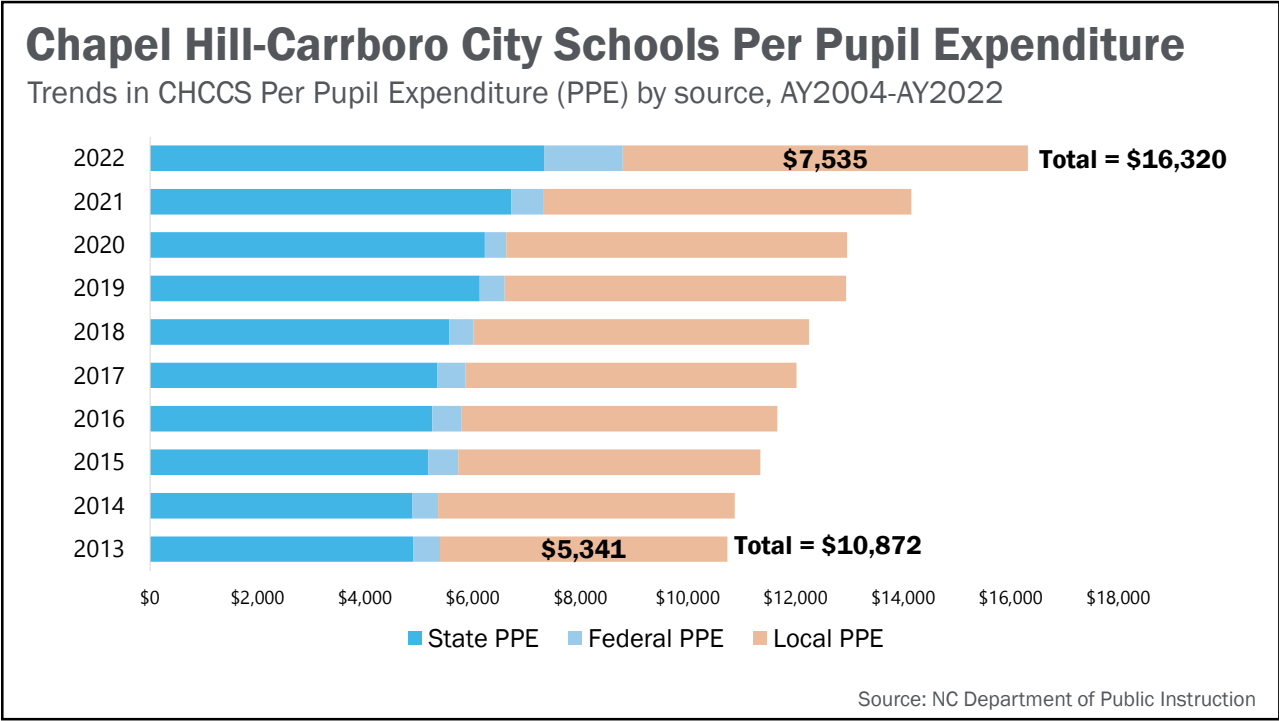
CHCCS leads in Local Per Pupil Expenditure (2021-22)

Local per pupil expenditure by Local Educational Agency (LEA) for AY 2021-22



Source: NC Department of Public Instruction

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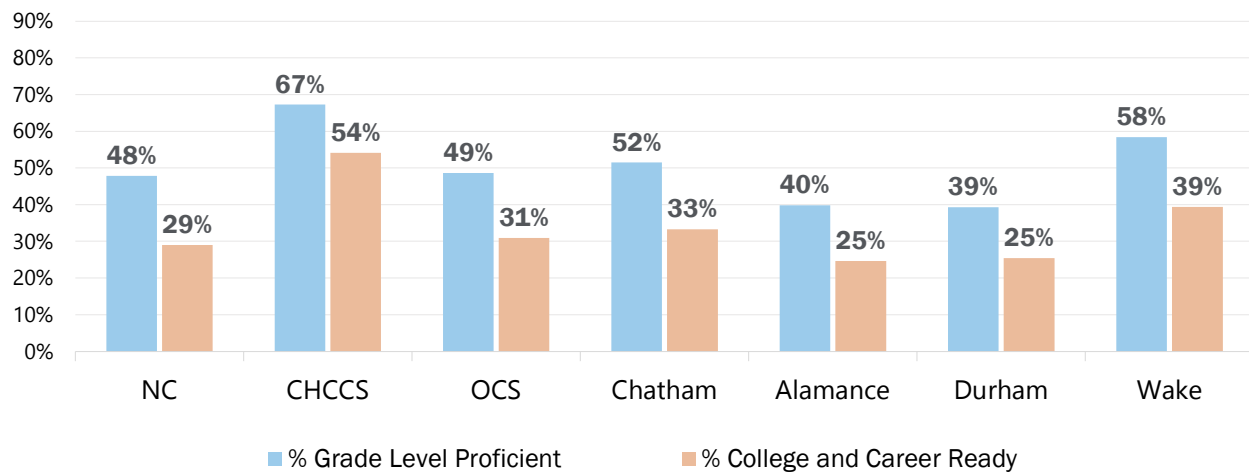
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3rd Grade Reading

78

CHCCS leads the region in 3rd grade reading

Percent of students “Grade Level Proficient” (level 3+) and “College and Career Ready” (level 4 or 5) on Grade 3 Reading EOG test, AY2023

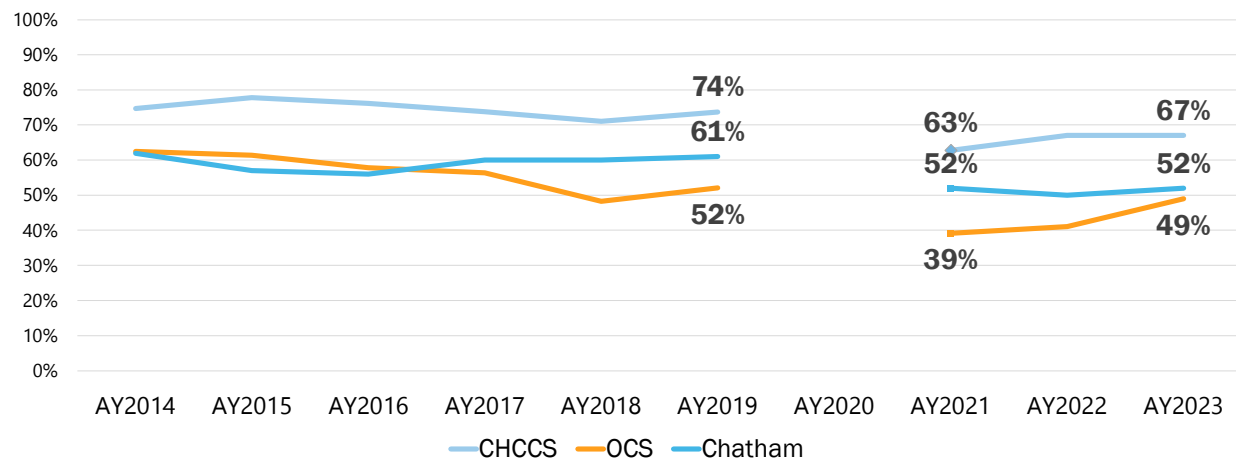


Source: NC Department of Public Instruction

79

3rd grade reading proficiency scores lag compared to 2019 levels

Percent of students earning “Grade Level Proficient” scores (level 3+) on Grade 3 Reading EOG test, AY2014-AY2023. No EOG tests were taken in 2020.

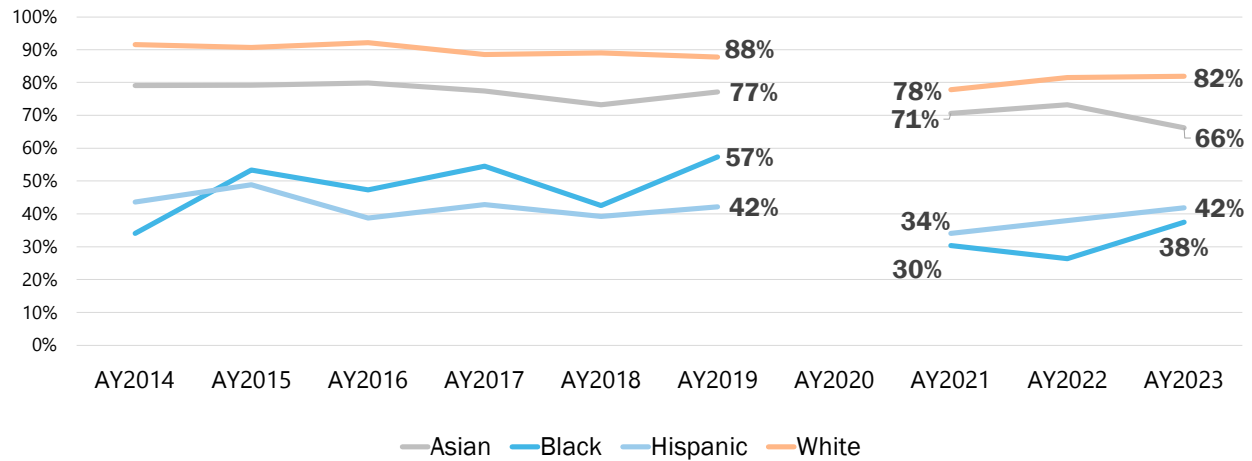


Source: NC Department of Public Instruction

80

CHCCS 3rd grade reading proficiency declines in pandemic, then rebounds for most groups

Percent of CHCCS students earning "Grade Level Proficient" scores (level 3+) on Grade 3 Reading EOG test, by race/ethnicity, AY2014 - AY2023

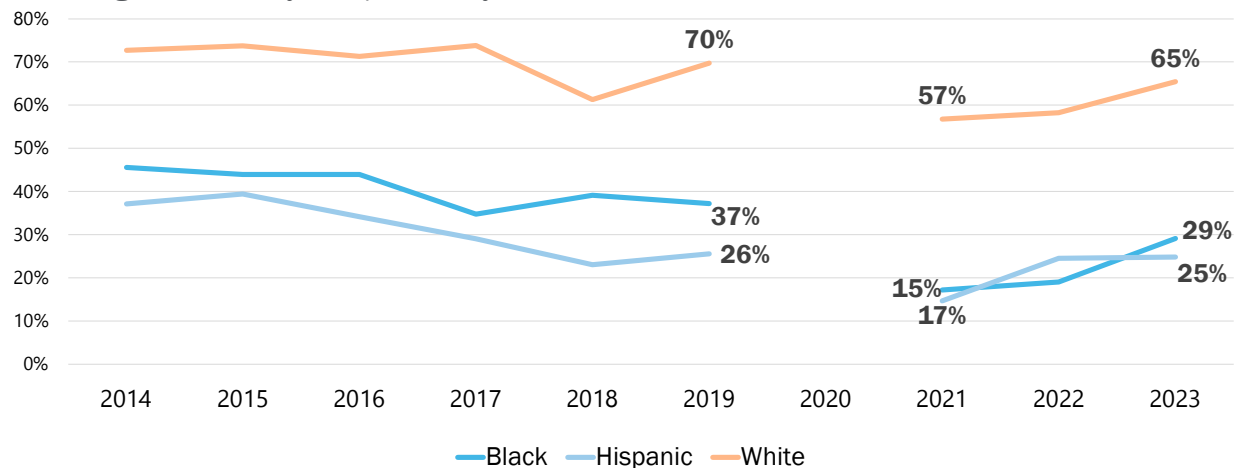


Source: NC Department of Public Instruction

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OCS 3rd grade reading proficiency declines in pandemic, Hispanic reading rebounds to pre-pandemic levels

Percent of CHCCS students earning "Grade Level Proficient" scores (level 3+) on Grade 3 Reading EOG test, by race/ethnicity, AY2014 - AY2023

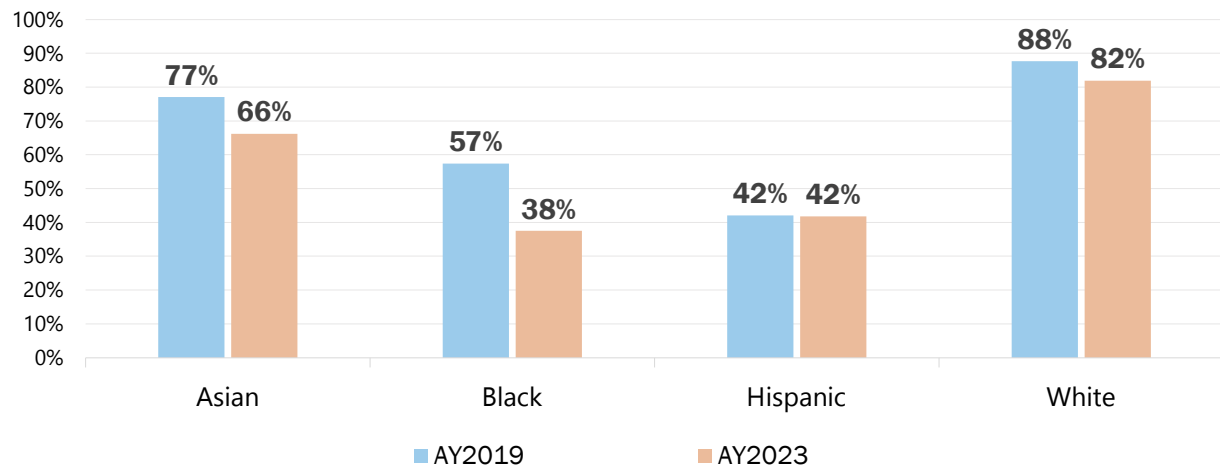


Source: NC Department of Public Instruction

82

CHCCS 3rd grade reading proficiency remains below pre-pandemic levels for most groups

Percent of CHCCS students earning “Grade Level Proficient” scores (Level 3+) on Grade 3 Reading EOG test, by race/ethnicity, AY2019 vs AY2023

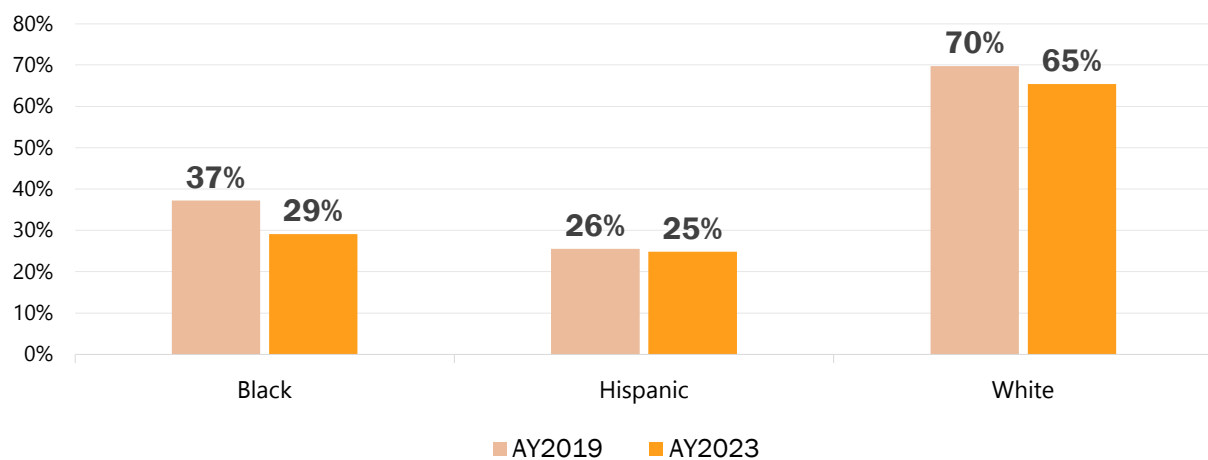


Source: NC Department of Public Instruction

83

OCS 3rd grade reading proficiency remains below pre-pandemic levels

Percent of OCS students “Grade Level Proficient” (Level 3+) on Grade 3 Reading EOG test, by race/ethnicity, AY2019 vs AY2023

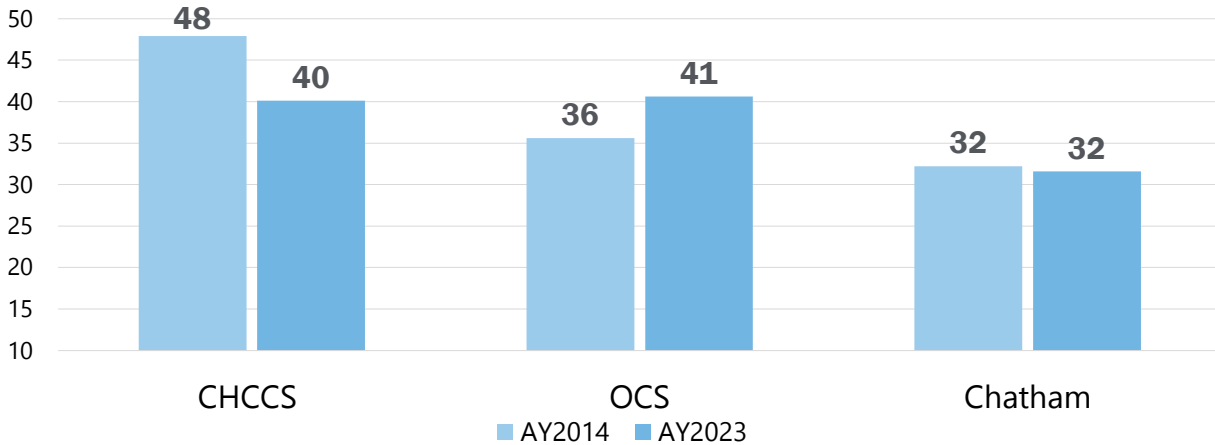


Source: NC Department of Public Instruction

84

White/Hispanic 3rd grade reading proficiency gap drops 8pts in CHCCS and widens 5pts in OCS

Percentage point difference between White and Hispanic students' scores on 3rd grade End of Grade test, Grade Level Proficient (3+).

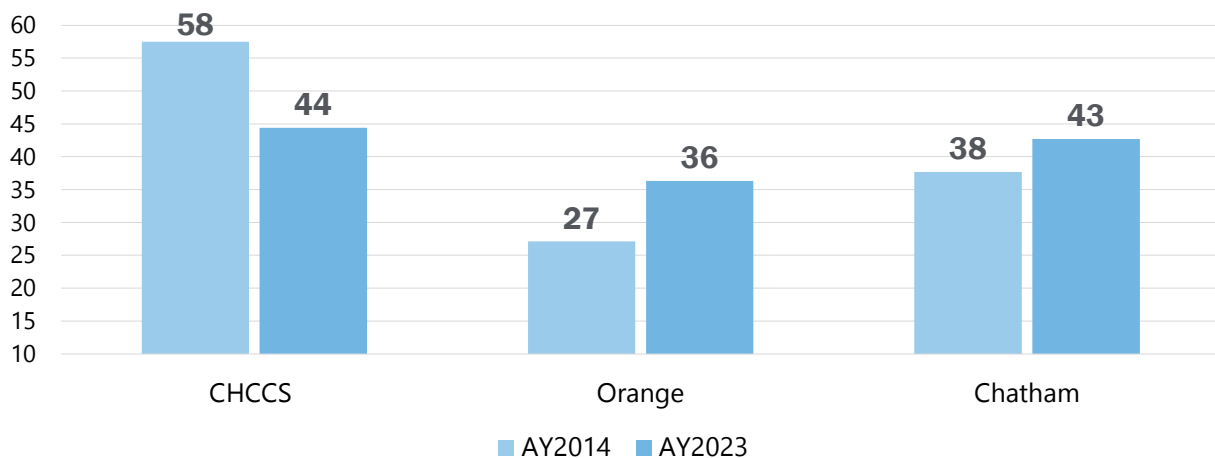


Source: NC Department of Public Instruction

85

White/Black 3rd grade reading proficiency gap narrows by 14pts in CHCCS and widens in OCS and Chatham

Percentage point difference between White and Black students' scores on 3rd grade End of Grade test, Grade Level Proficient.



Source: NC Department of Public Instruction

86

Tracking reading proficiency for the class of 2030

Performance of students who spent their 3rd grade year in remote learning (AY2021) on their Reading End of Grade (EOG) tests in 3rd grade, 4th grade, and 5th grade

	CHCCS Grade Level Proficient	OCS Grade Level Proficient	Chatham Grade Level Proficient
Grade 3 (AY2021)	63%	39%	52%
Grade 4 (AY2022)	65%	50%	64%
Grade 5 (AY2023)	65%	51%	58%
<i>for comparison:</i> Grade 5 (AY2019)	71%	45%	60%

Source: NC Department of Public Instruction

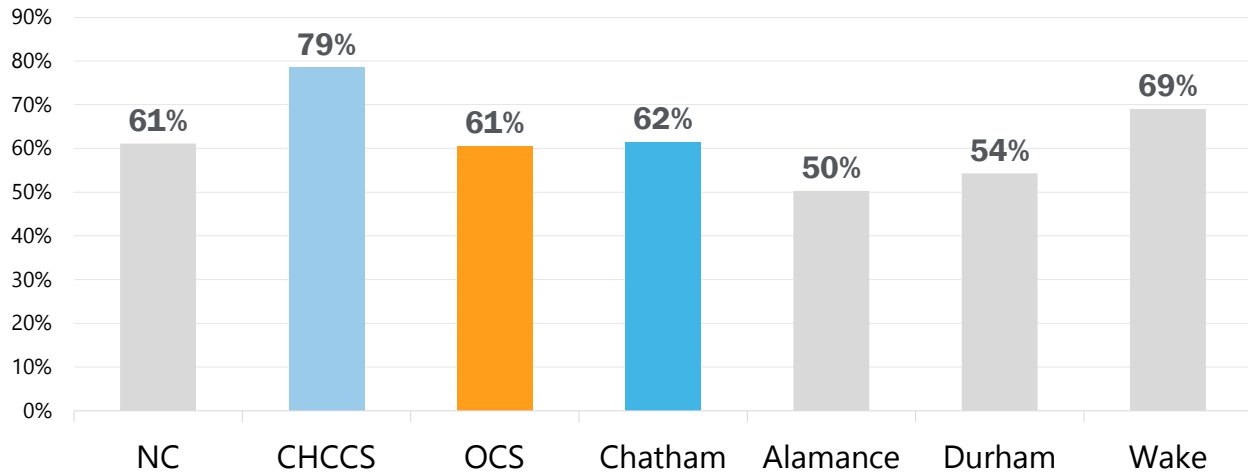
87

8th Grade Science

88

Percent of 8th grade students earning “College and Career Ready” scores on Science EOG

Percent of students earning “College and Career Ready” scores (level 4 or 5) on Grade 8 Science End of Grade (EOG) test, AY2023

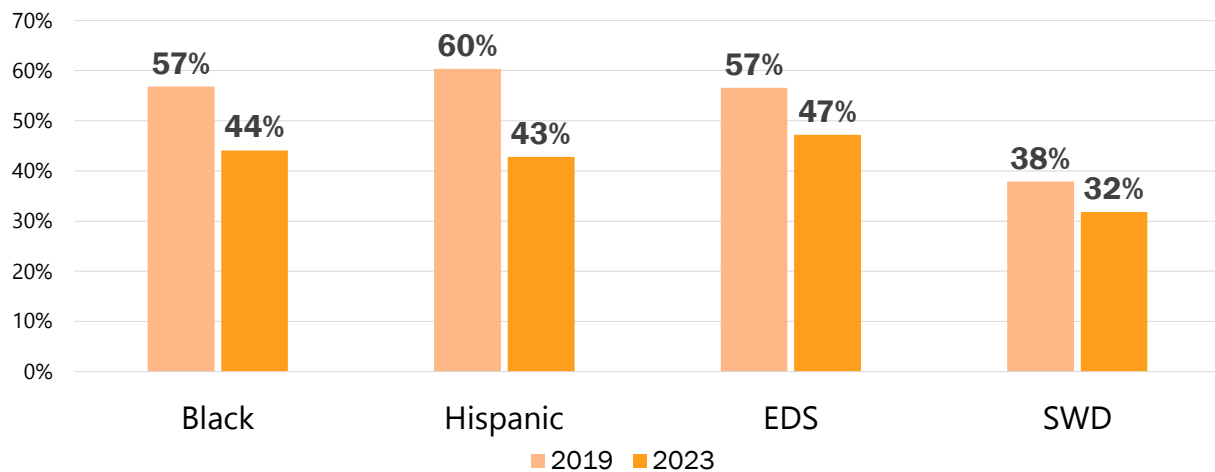


Source: NC Department of Public Instruction

89

OCS share of 8th graders “College and Career Ready” on Science EOG below AY2019 scores for all groups

Percent of Orange County students earning “College and Career Ready” scores (level 4 or 5) on Grade 8 Science EOG test, by subgroup, AY2019 vs AY2023

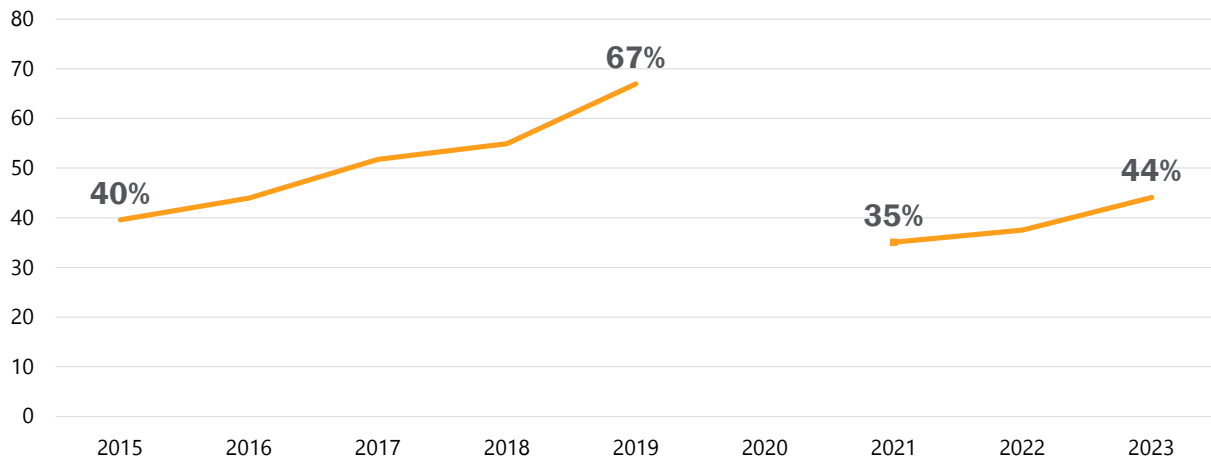


Source: NC Department of Public Instruction

90

OCS Black student performance on 8th grade science EOG shows substantial impacts of COVID

Percent of Black students earning a "College and Career Ready" score (level 4 or 5) on Grade 8 Science EOG, AY2014-AY2023

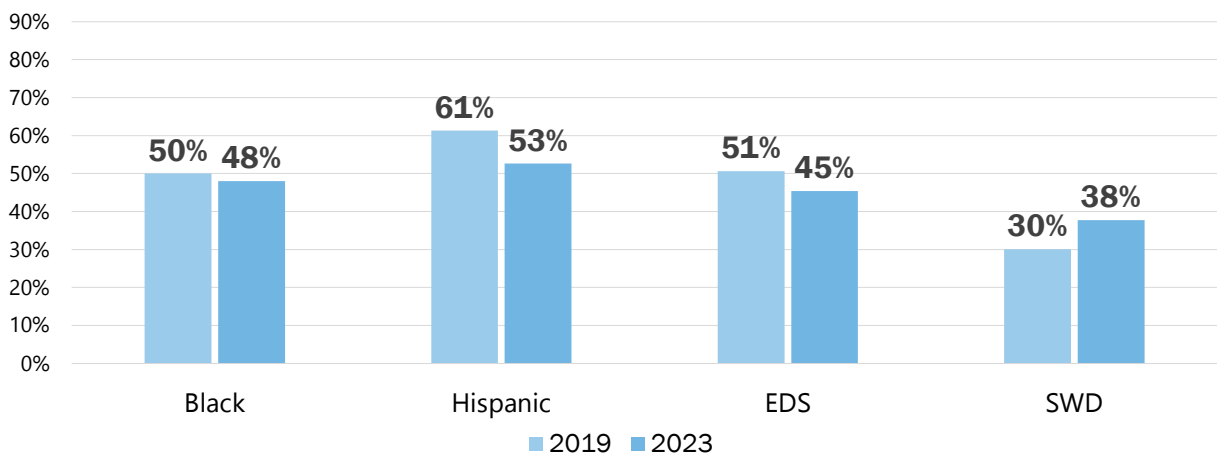


NC Department of Public Instruction

91

CHCCS percent of 8th graders "College and Career Ready" on Science EOG remains below AY2019, except students with disabilities

Percent of CHCCS students "College and Career Ready" (level 4 or 5) on Grade 8 Science EOG test, by subgroup, AY2019 vs AY2023

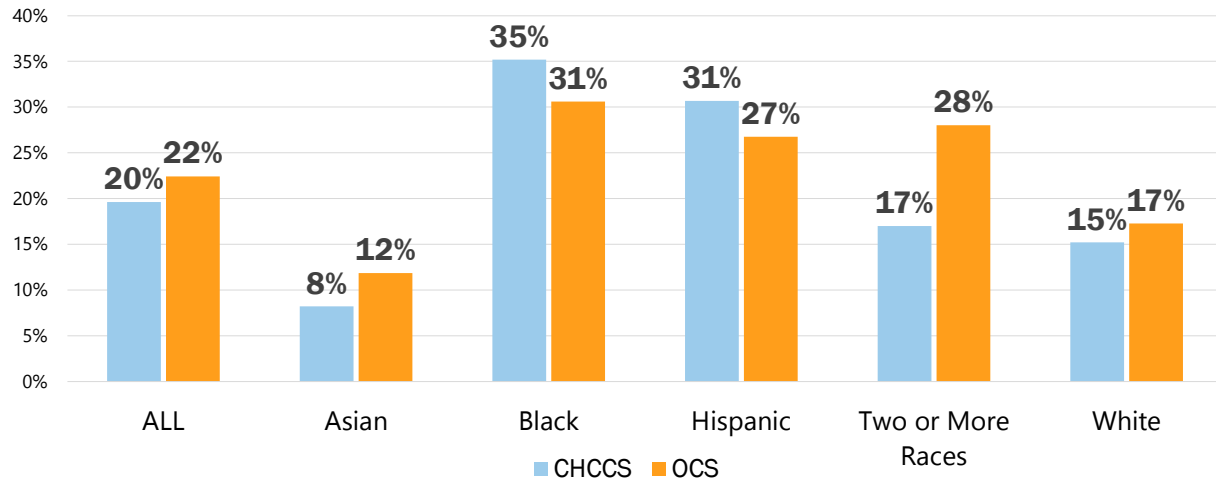


Source: NC Department of Public Instruction

92

Chronic absenteeism by race/ethnicity, AY2022

Chronic absenteeism is defined as missing 10% of school days in a year (18+ days if enrolled for the full school year)



Source: NC Department of Public Instruction

93

High School, Graduation, + Post-Secondary Intentions

94

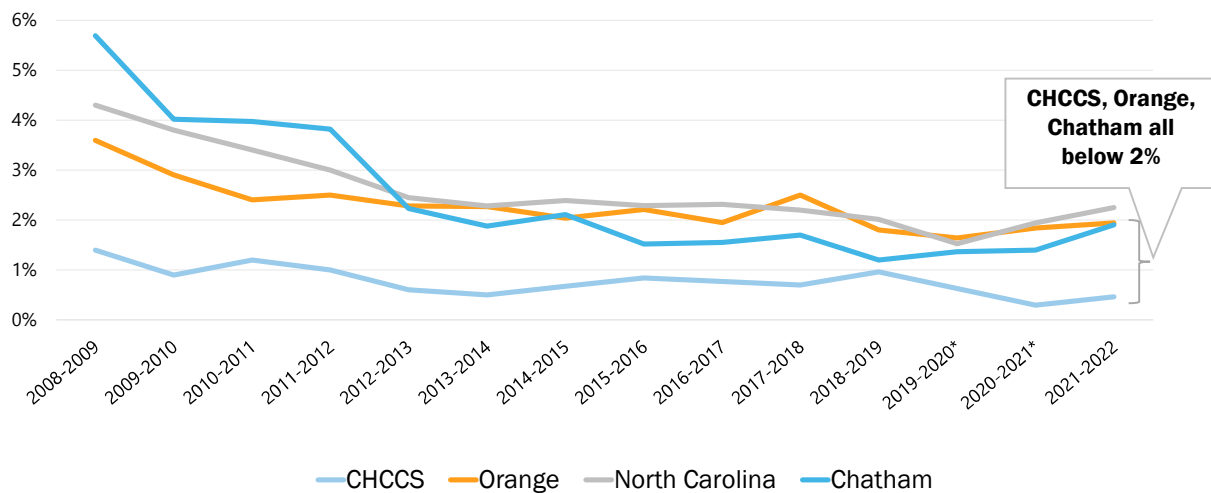
Adjusted cohort graduation rates

	All Students		Black Students		Hispanic Students		Economically Disadvantaged		Students with Disabilities	
	2014	2023	2014	2023	2014	2023	2014	2023	2014	2023
NC	84%	86%	80%	84%	77%	81%	78%	84%	64%	72%
CHCCS (Orange)	91%	95%	91%	91%	78%	89%	79%	90%	69%	84%
OCS (Orange)	86%	88%	84%	87%	70%	84%	74%	84%	72%	69%
Chatham	82%	89%	83%	80%	73%	85%	74%	87%	77%	65%
Alamance	79%	85%	77%	81%	70%	83%	71%	85%	61%	69%
Durham	82%	84%	79%	86%	72%	77%	75%	84%	57%	76%
Wake	83%	90%	74%	87%	68%	78%	68%	83%	58%	75%

Source: NC Department of Public Instruction

95

High school dropout rates all below 2%, CHCCS at 0.5%

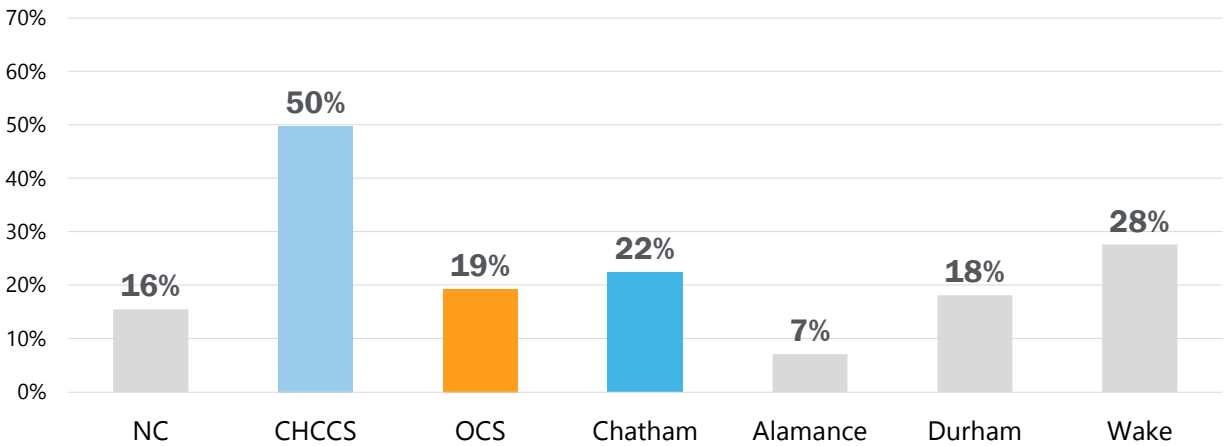


Source: NC Department of Public Instruction

96

Percent of all students meeting all 4 ACT subtest benchmarks (English, Math, Reading, Science)

AY2023

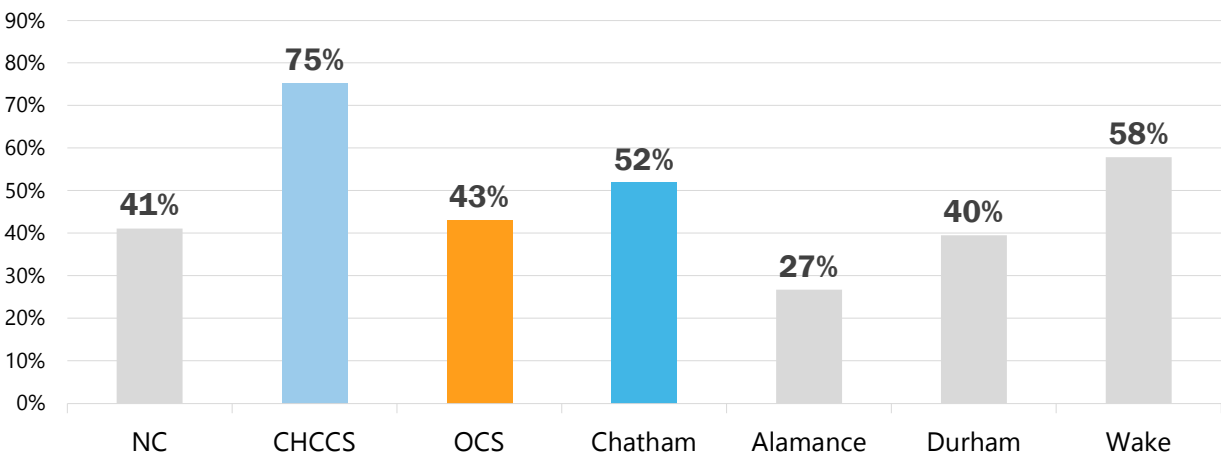


Source: NC Department of Public Instruction

97

Percent of students earning a UNC system minimum ACT composite score of 19

AY2023

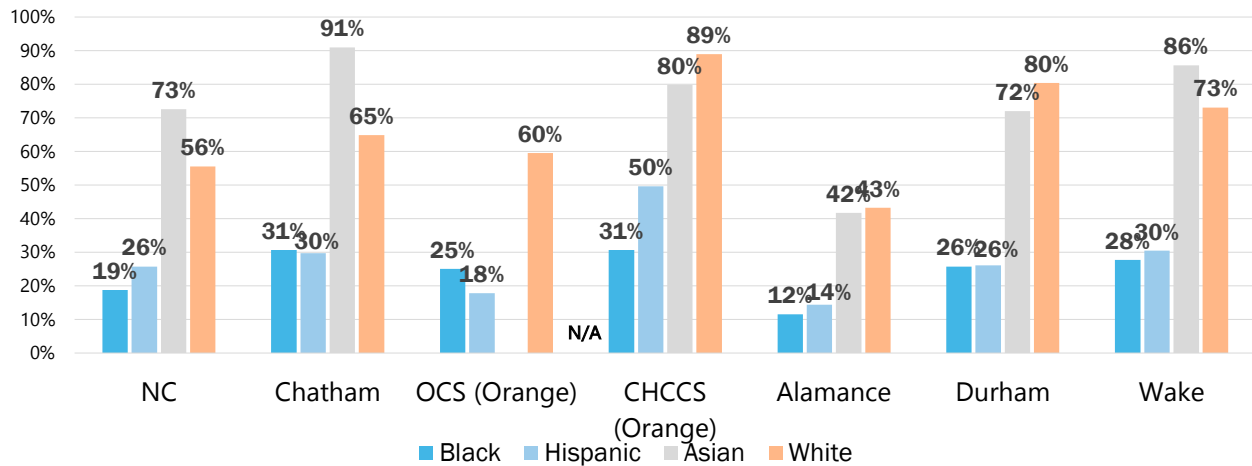


Source: NC Department of Public Instruction

98

Percent of students earning a UNC System minimum ACT composite score of 19 by race/ethnicity

AY2023

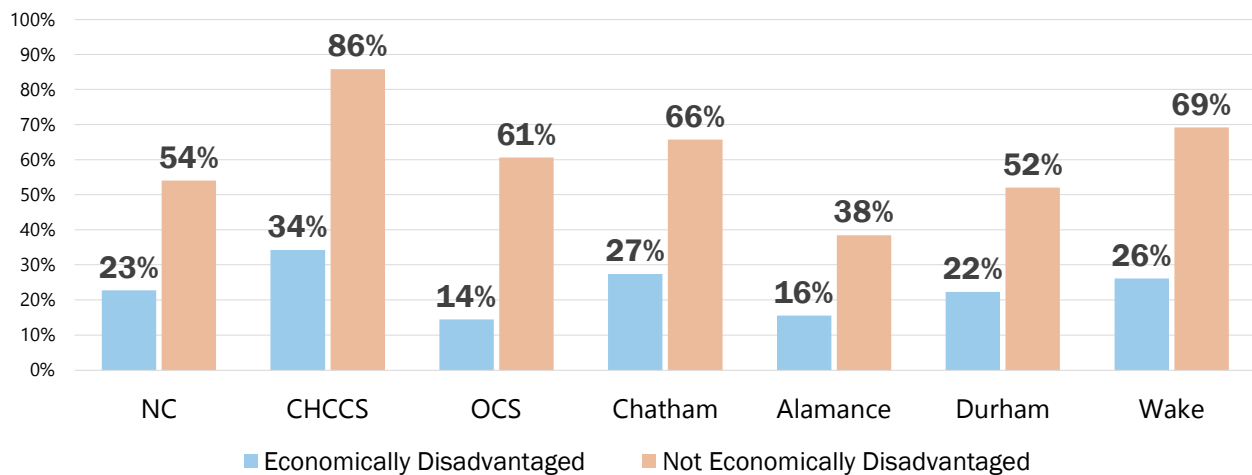


Source: NC Department of Public Instruction

99

Percent of economically disadvantaged students earning a UNC System minimum ACT composite score of 19

AY2023

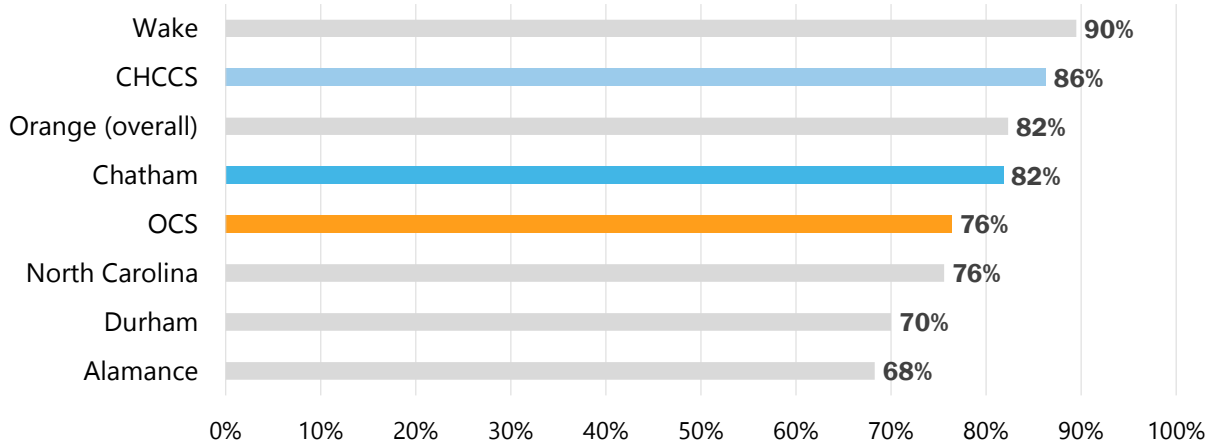


Source: NC Department of Public Instruction

100

Wake County students most likely to report postsecondary intentions

Percent of high school graduates who reported intentions to enroll in post-secondary education, AY2022

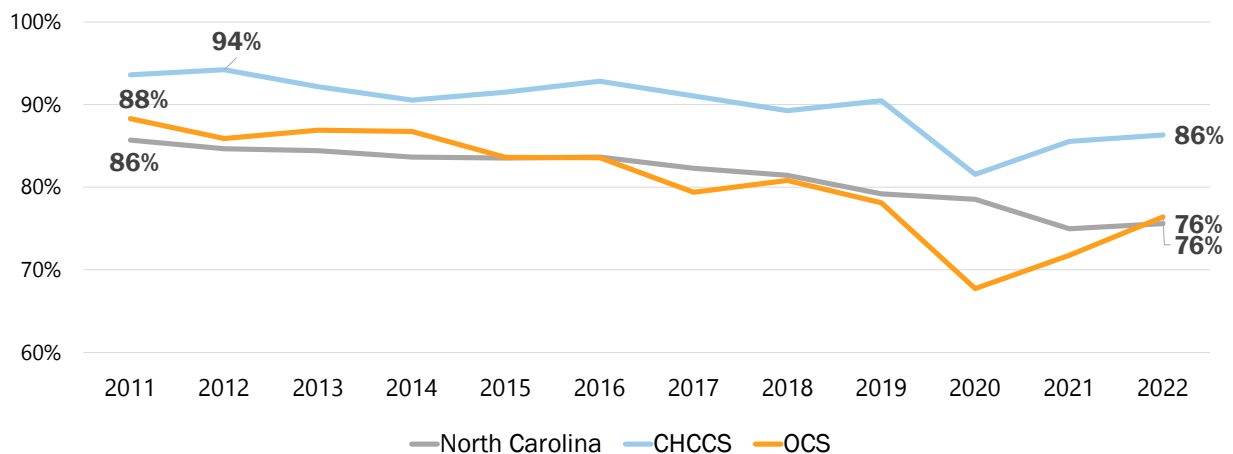


Source: NC Department of Public Instruction

101

Postsecondary education intentions slowly declining over decade

Percent of high school graduates who reported intentions to enroll in postsecondary education, AY2011 to AY2022

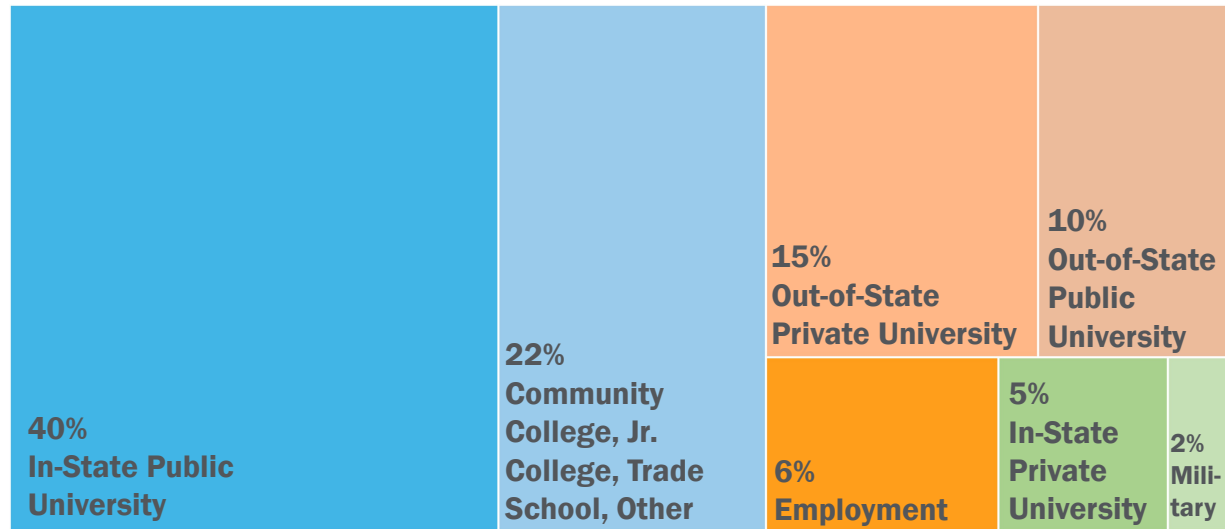


Source: NC Department of Public Instruction

102

CHCCS student postsecondary intentions

Breakdown of CHCCS seniors' reported plans post-graduation, AY2021-22

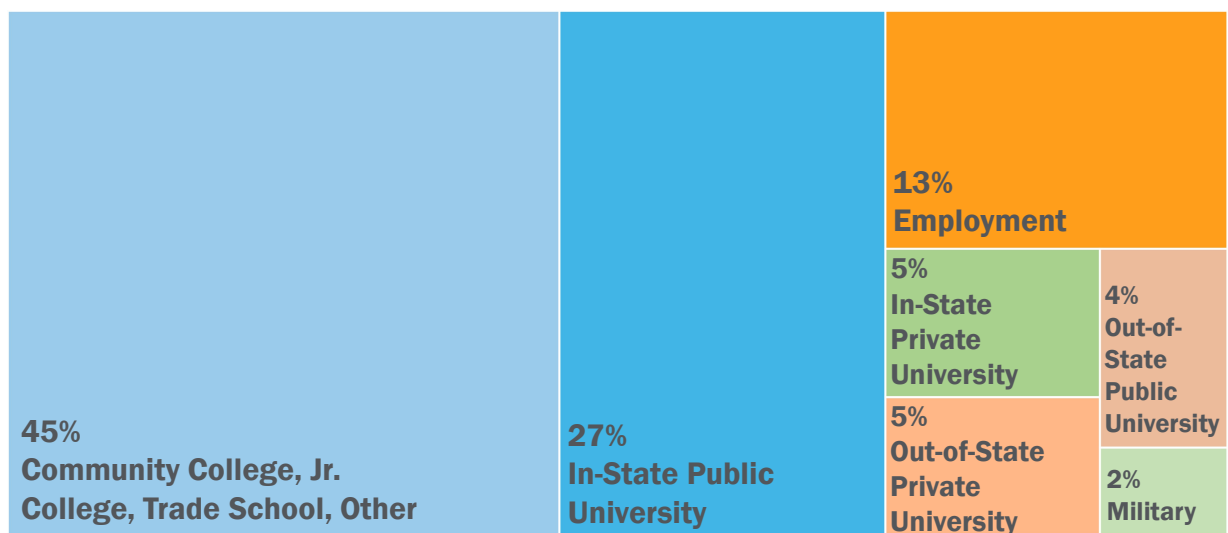


Source: NC Department of Public Instruction

103

OCS student postsecondary intentions

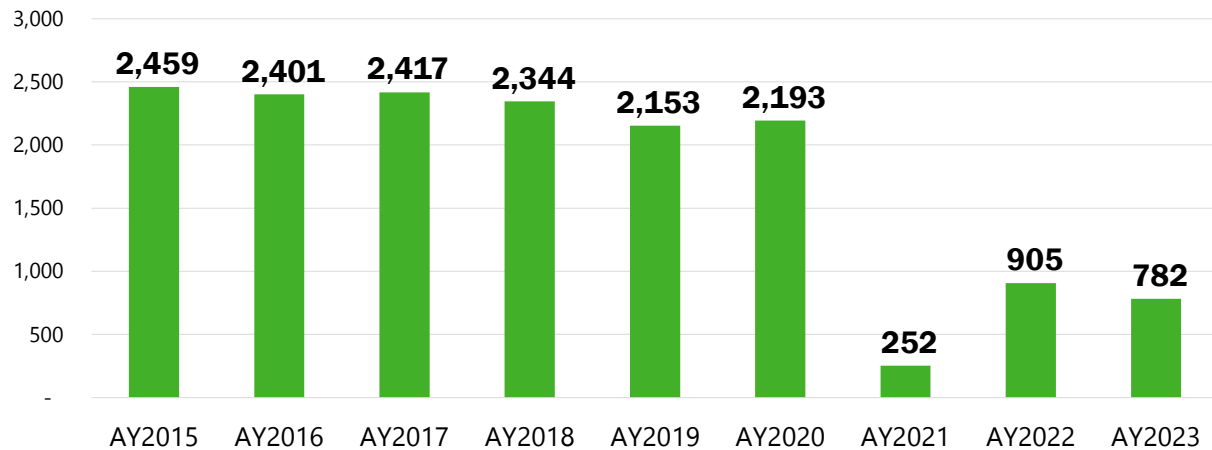
Breakdown of Orange County Schools seniors' reported plans post-graduation, AY2021-22



Source: NC Department of Public Instruction

104

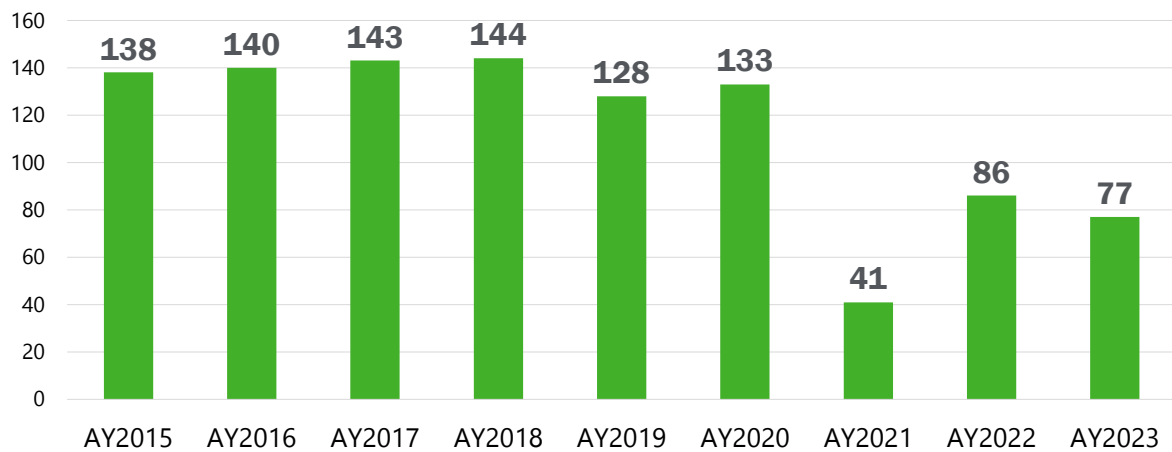
Durham Tech Orange County Campus in-person for-credit class enrollment



Source: Durham Tech

105

Durham Tech Orange County Campus in-person credit classes offered

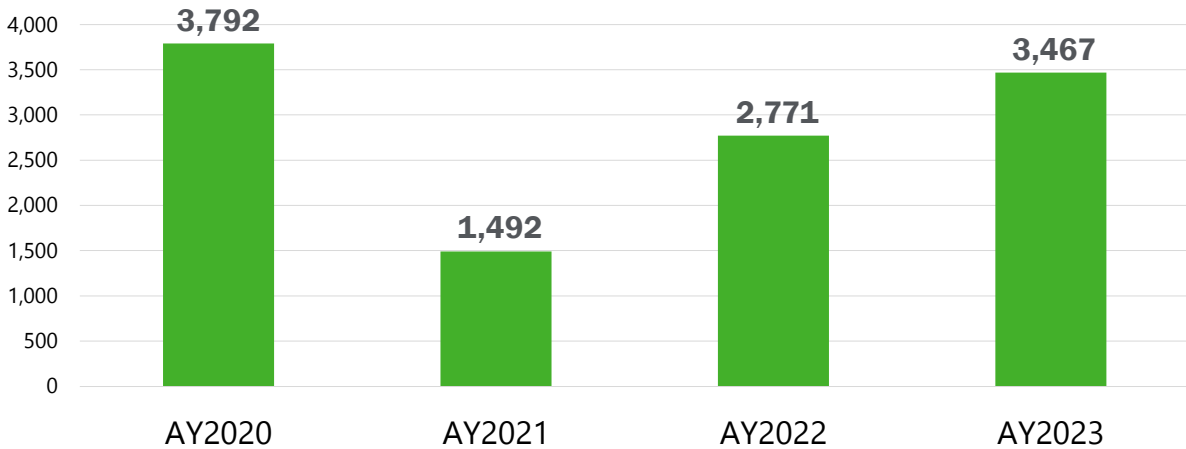


Source: Durham Tech

106

Durham Tech Orange County Campus continuing education enrollment approaches pre-pandemic levels

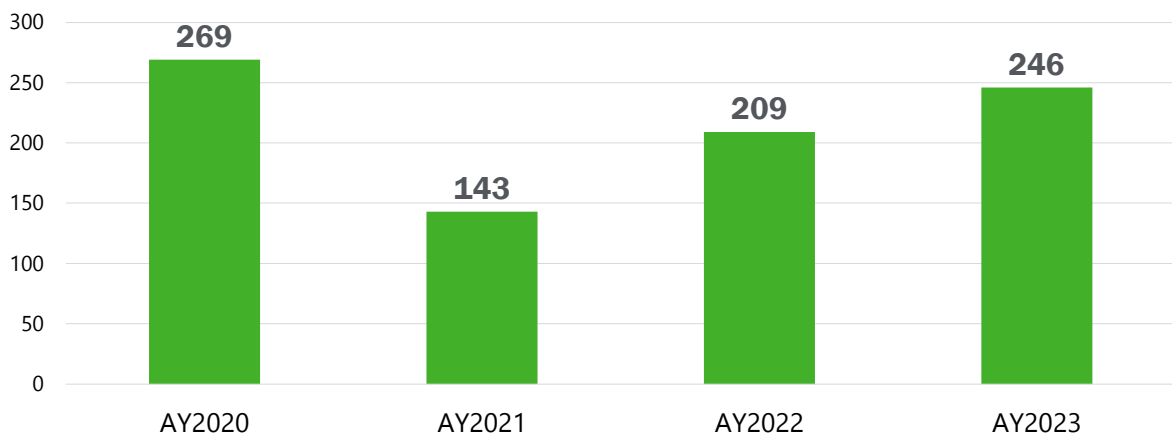
Total Durham Tech Orange County Campus in-person continuing education (noncredit) seats used



Source: Durham Tech

107

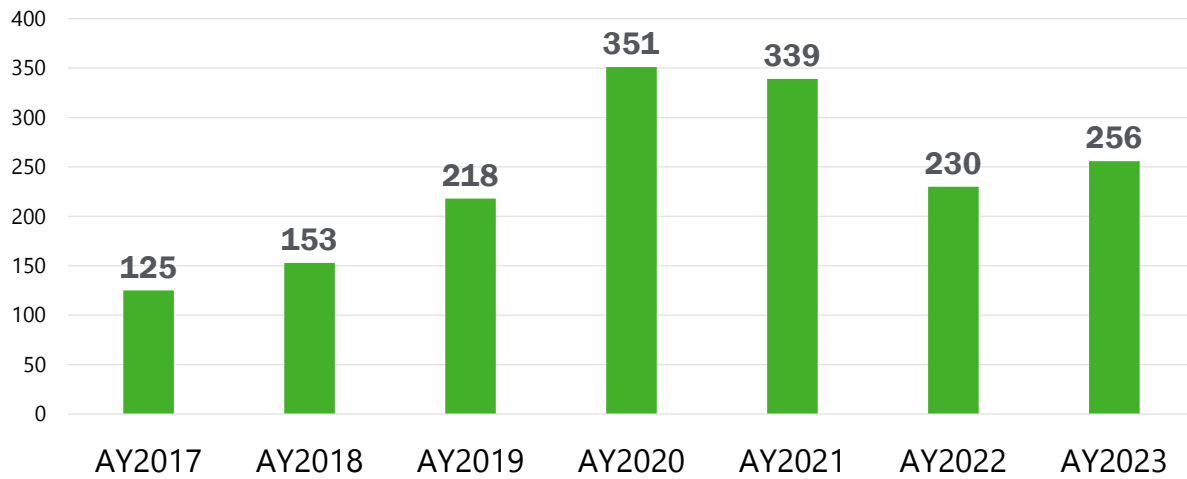
Durham Tech Orange County Campus in-person continuing education (noncredit) classes offered



Source: Durham Tech

108

Dually enrolled high school students taking classes at Durham Tech (Orange County residents)

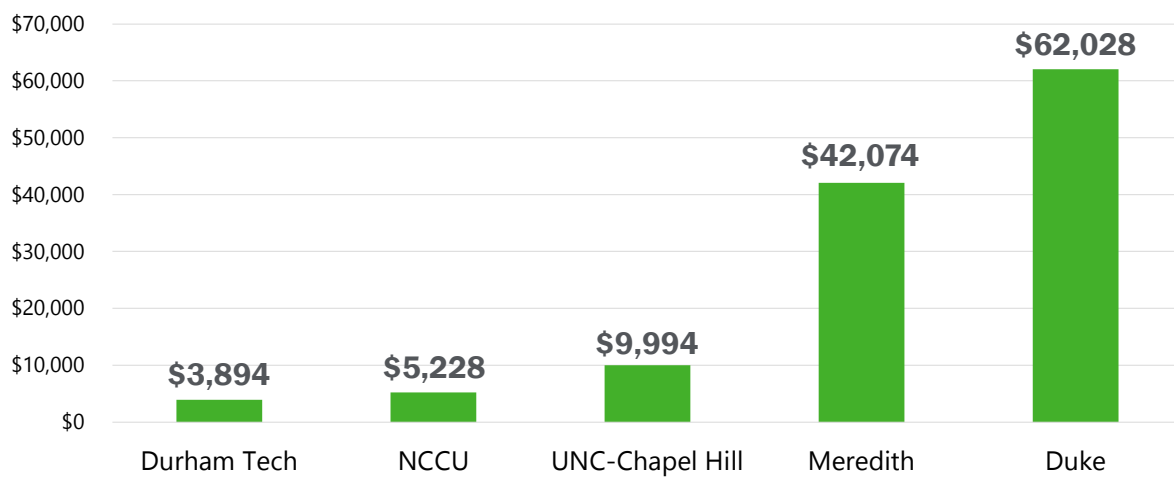


Source: Durham Tech

109

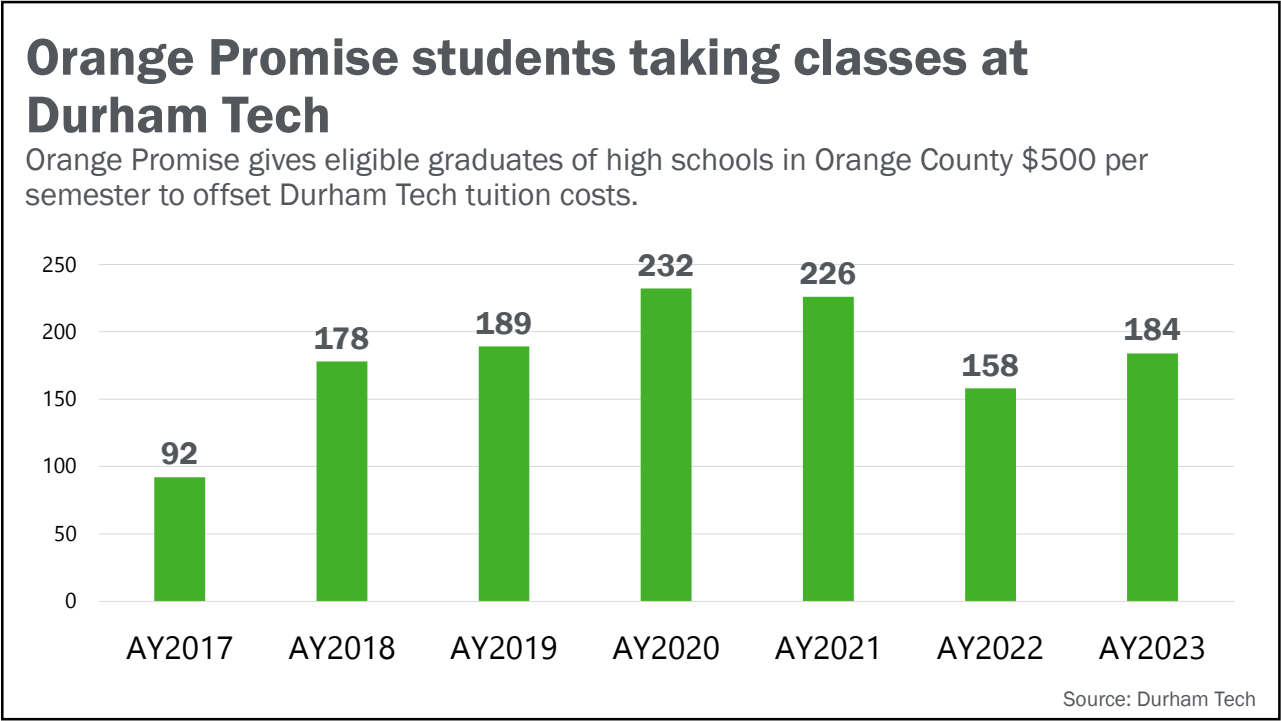
Comparing cost of local higher education options

Combined cost of tuition, fees, books, and supplies at local higher education institutions, 2022



Source: Durham Tech

110



111

A Conversation with Superintendent Hamlett

112




Dr. Nyah Hamlett
Superintendent




CHAPEL HILL-
CARRBORO
CITY SCHOOLS

#DataDive2023

113



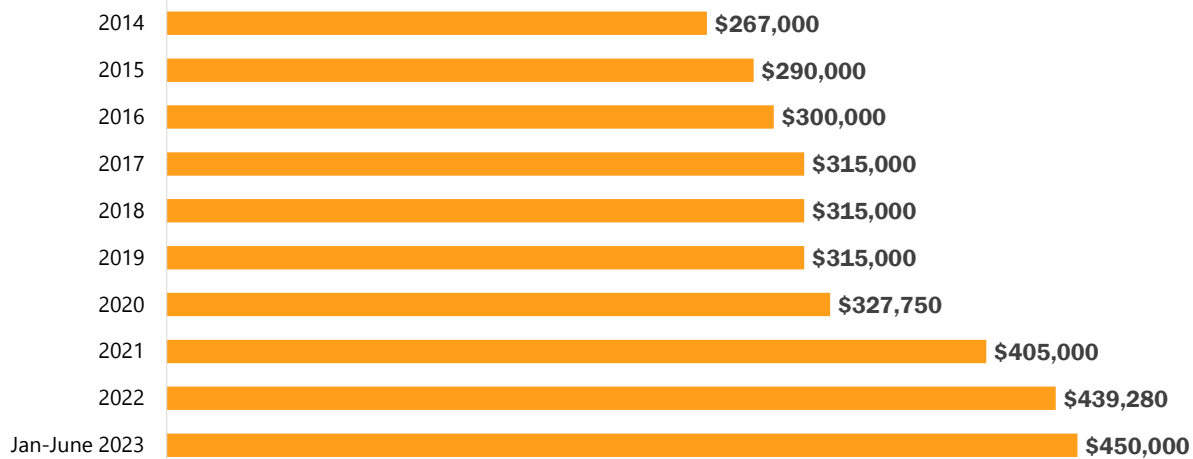
For Sale Housing



114

Orange County median home sales price rises to \$450,000

Orange County median home sale price, 2013 – June 2023

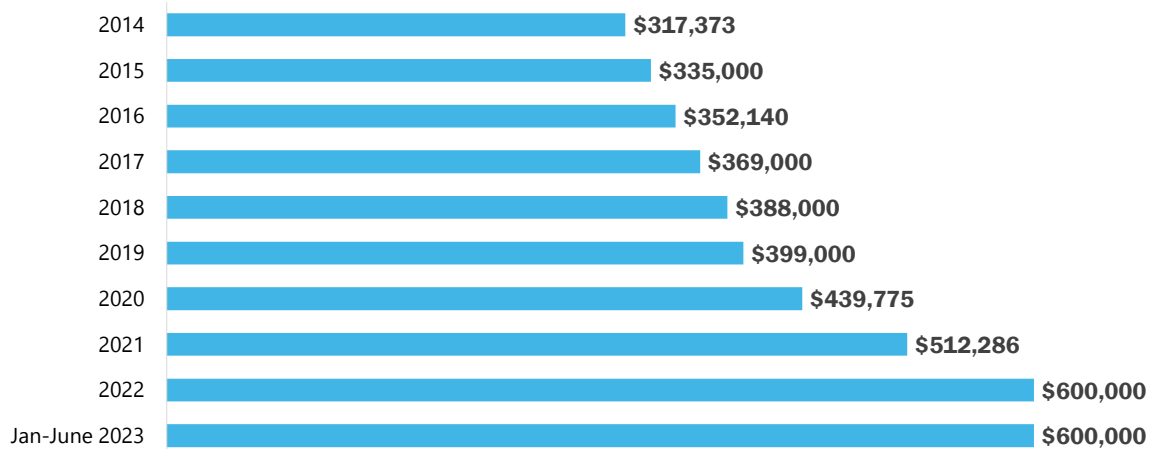


Source: Triangle MLS/Allen Tate Realtors

115

Chatham County median home sales price increases over \$200,000 since 2019 to \$600,000

Chatham County median home sale price, 2011 – June 2023

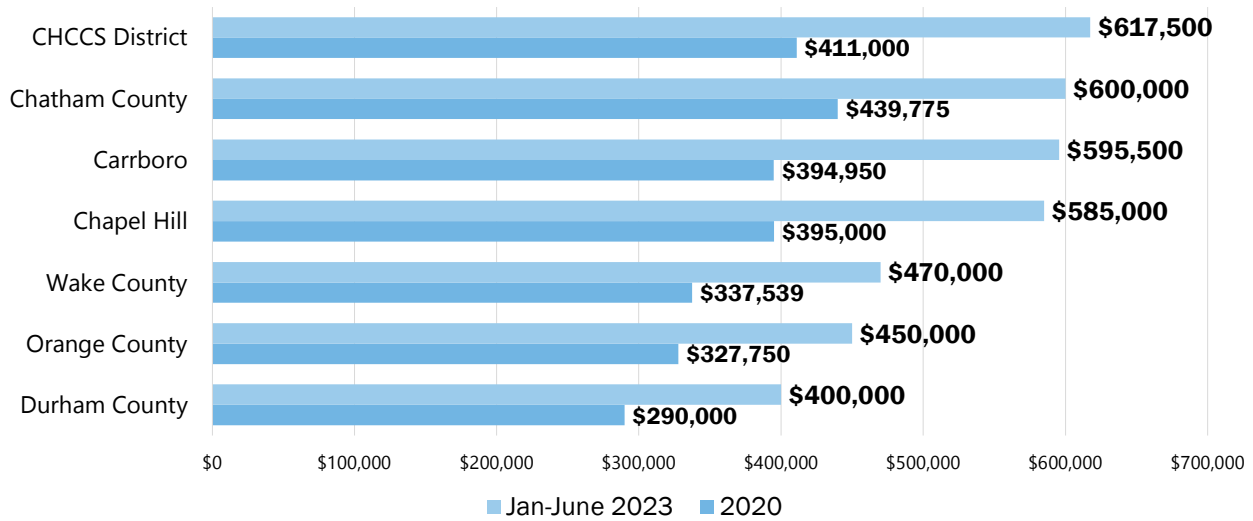


Source: Triangle MLS/Allen Tate Realtors

116

Median home sales price change 2020 - June 2023

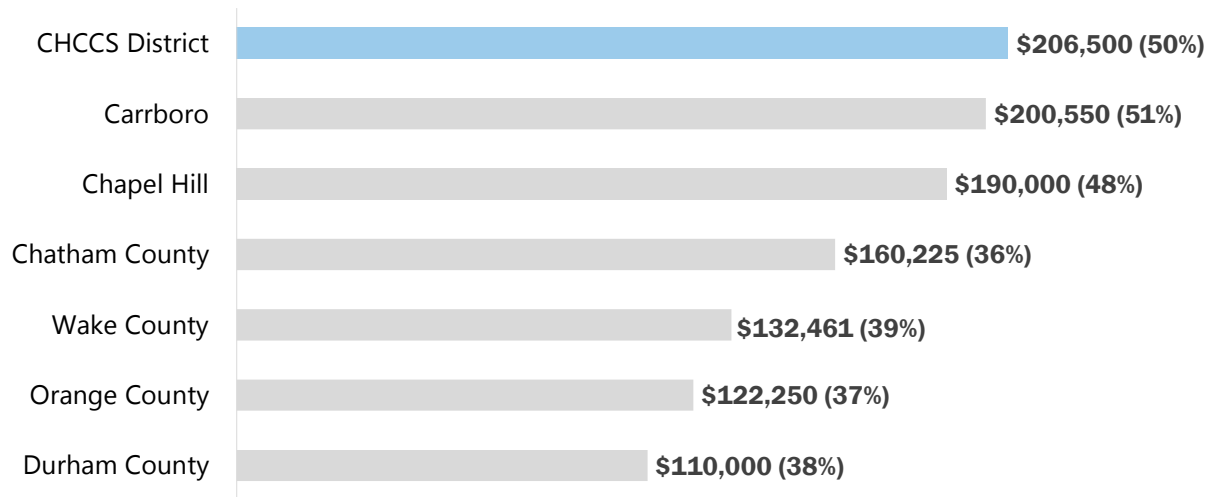
Median residential closing price (2020 vs Jan-June 2023)



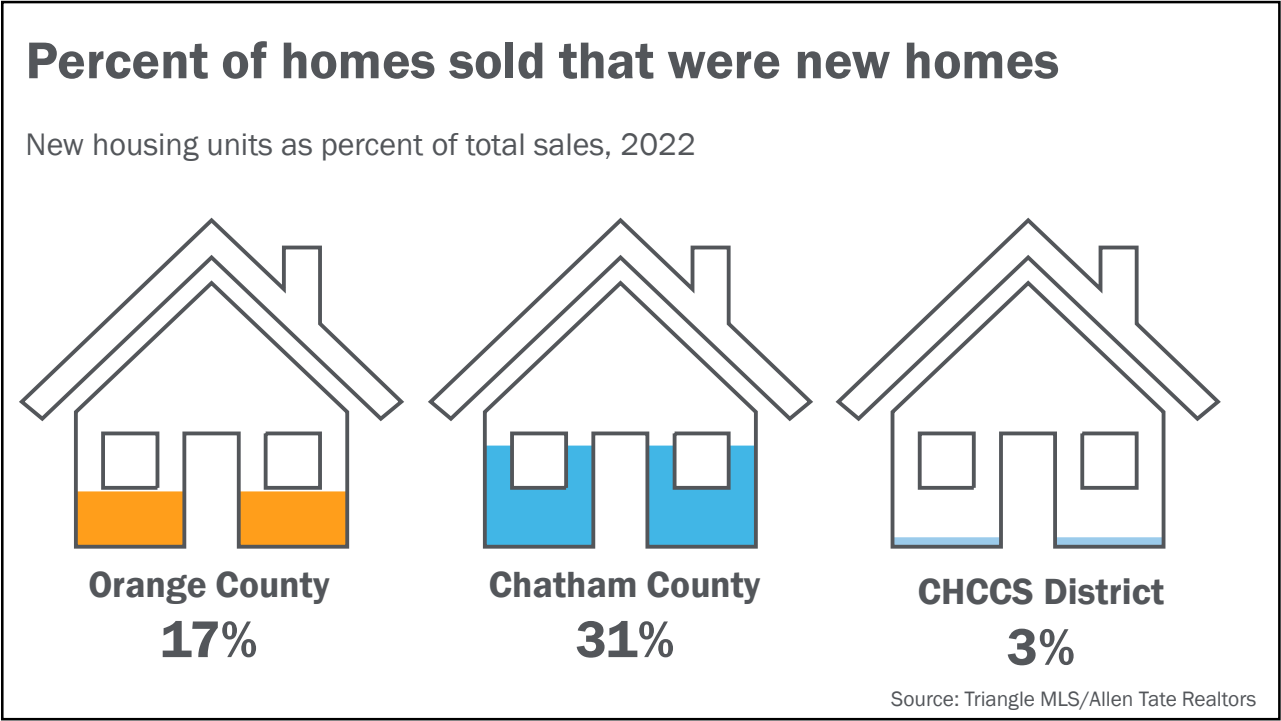
117

Increase in local home prices between 2020 and June 2023 is led by the CHCCS District

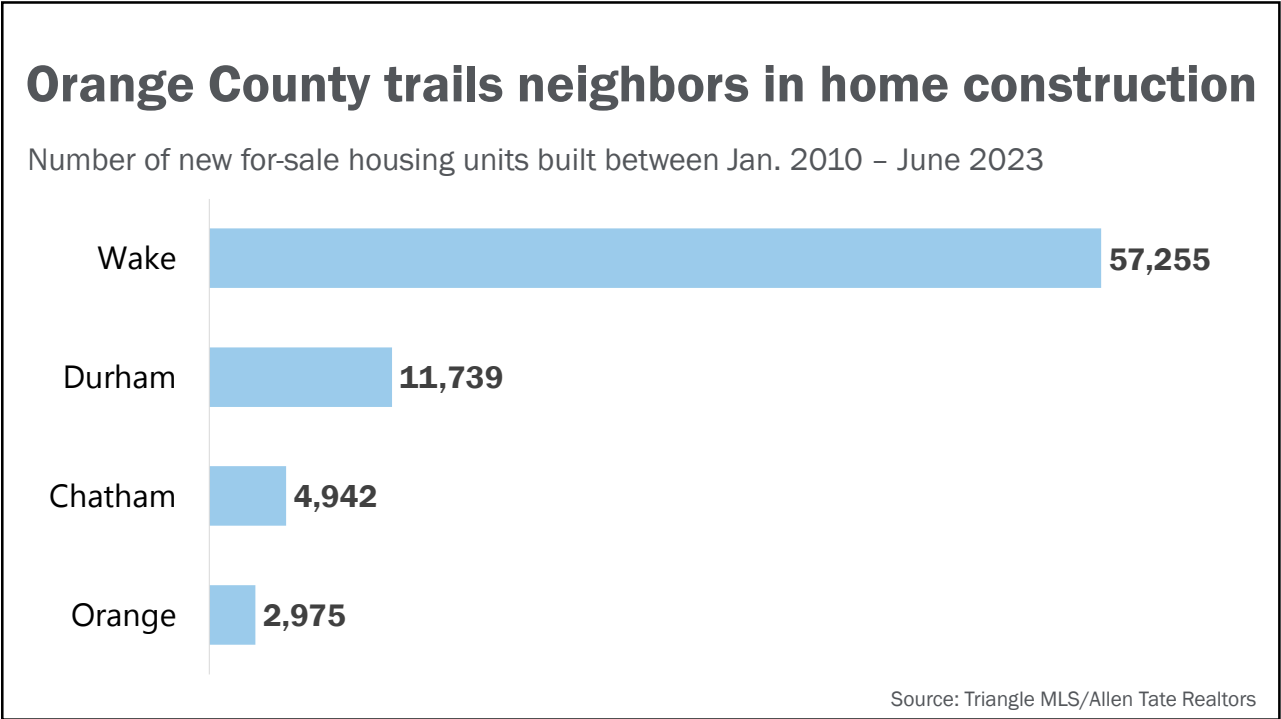
Dollar change in median home sale price, 2020 vs Jan-Jun 2023



118

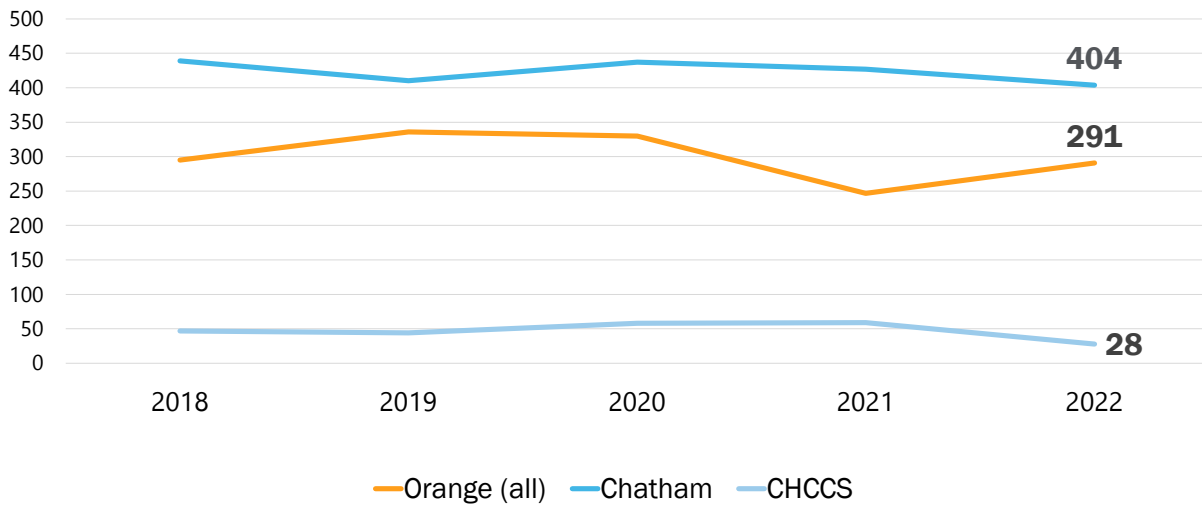


119



120

Total new construction home sales per year

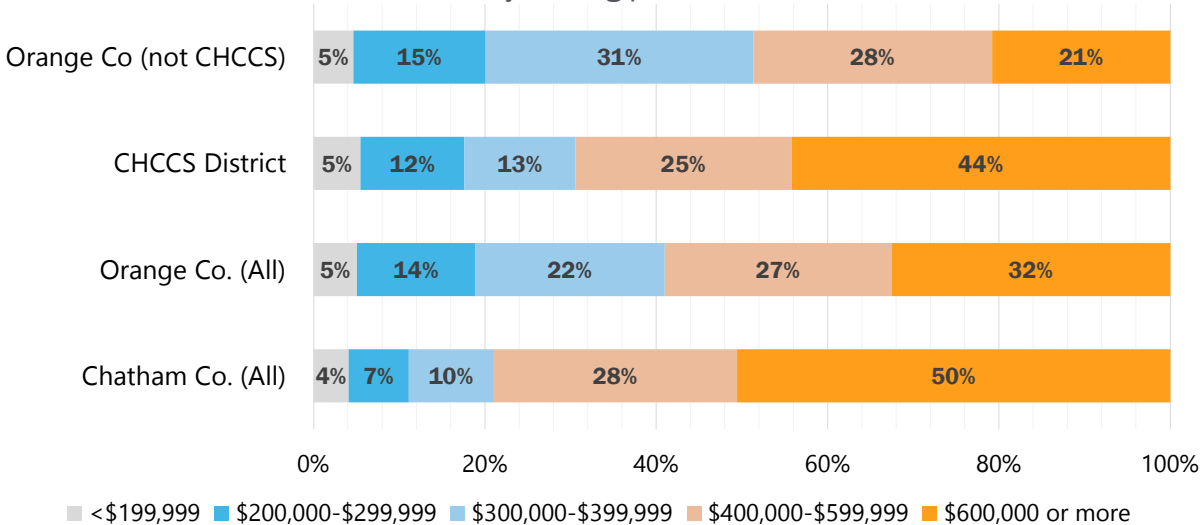


Source: Triangle MLS/Allen Tate Realtors

121

2022 home sales by price band

2022 number of home transactions by closing price

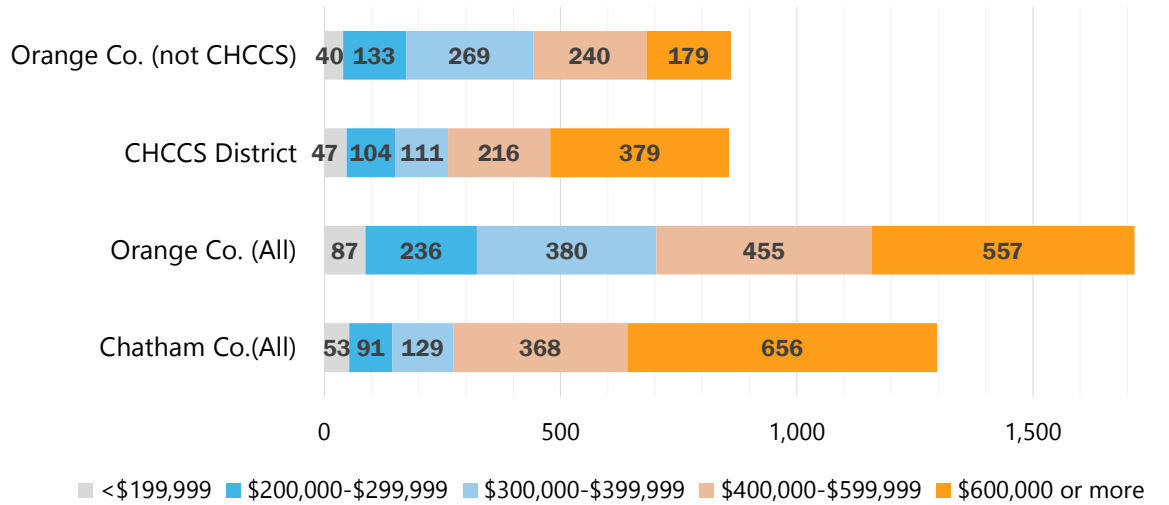


Source: Triangle MLS/Allen Tate Realtors

122

2022 home sales by price band

2022 number of home transactions by closing price



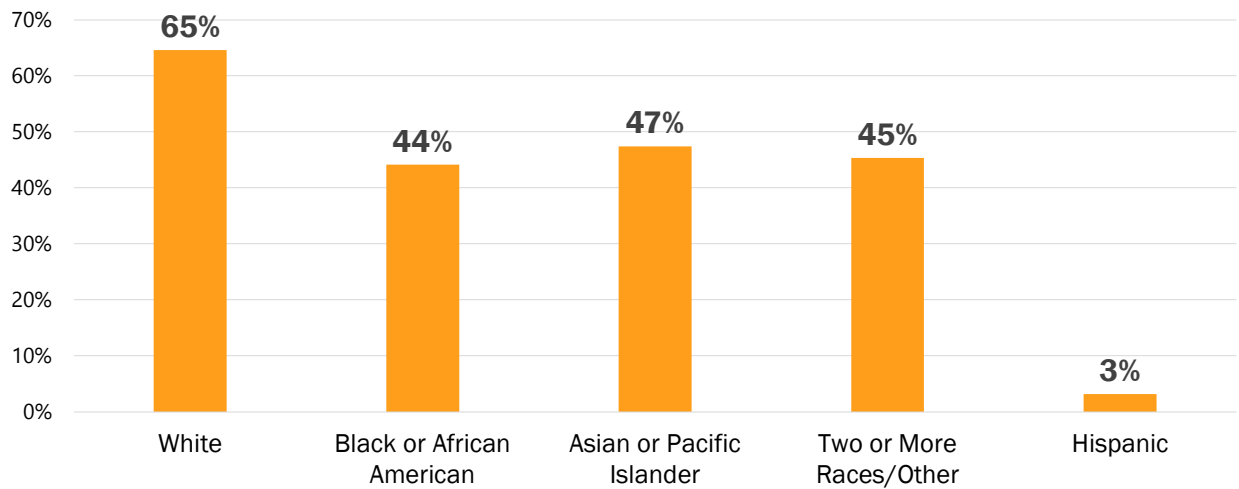
123

Homeownership Rates (new)

124

Homeownership rates in Orange County by race/ethnicity

Percent of households living in owner-occupied housing. Race is determined by Head of Household.



Source: 2020 US Census Demographic and Housing Characteristics Files

125

North Carolina counties homeownership rates and rank

Percent of households living in owner-occupied housing and rank among North Carolina's 100 counties by race/ethnicity. Race is determined by Head of Household.

	Orange	Chatham	Alamance	Durham	Wake	Who is #1
White	65% (98 th)	83% (6 th)	73% (85 th)	63% (98 th)	69% (90 th)	Union - 86%
Black or African American	44% (81 st)	65% (13 th)	45% (79 th)	43% (81 st)	43% (82 nd)	Gates - 79%
Asian or Pacific Islander	47% (93 rd)	88% (5 th)	61% (72 nd)	43% (96 th)	65% (57 th)	Bertie - 94%
Two or More Races/Other	45% (95 th)	61% (34 th)	57% (54 th)	37% (99 th)	46% (94 th)	Graham - 81%
Hispanic	3% (33 rd)	5% (11 th)	6% (10 th)	4% (27 th)	4% (30 th)	Duplin - 9%

Source: 2020 US Census Demographic and Housing Characteristics Files

126

Housing: For Rent

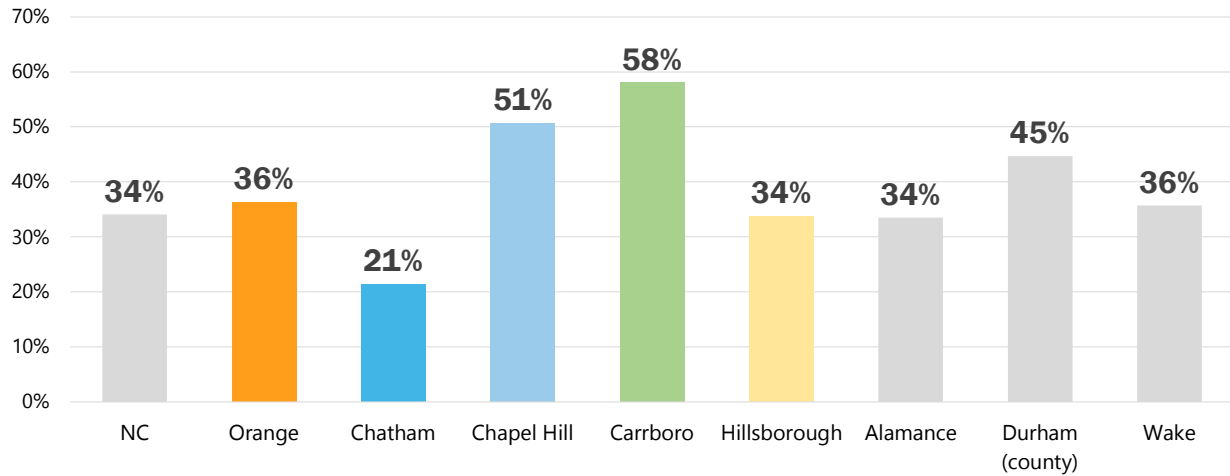
127

**From the American Community
Survey 2017-2021**

128

Percent of residents renting varies across region

Share of renter-occupied households, 2017-21

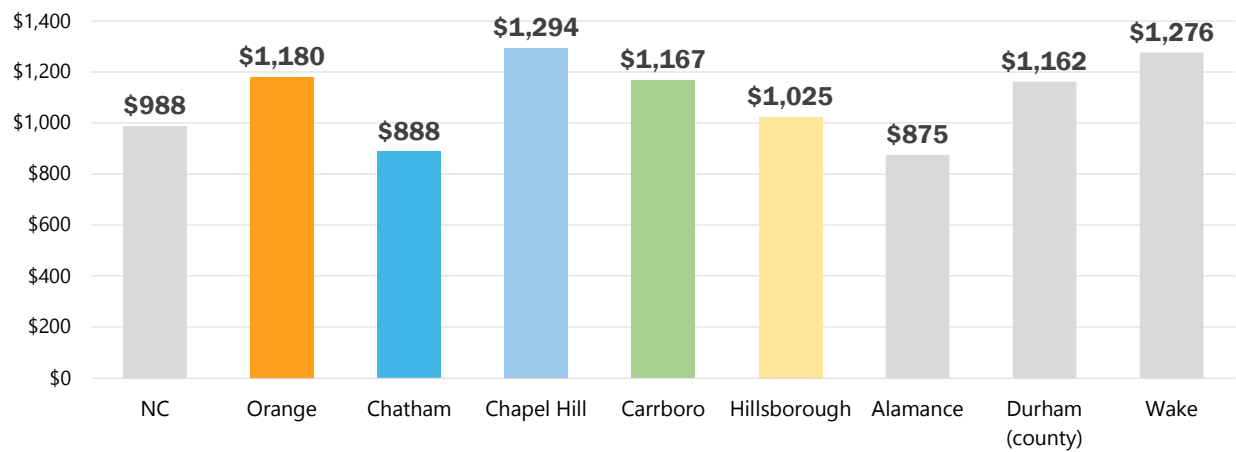


Source: American Community Survey (2017-2021 5-Year Estimates)

129

Median rent estimated by the 2021 American Community Survey

Median rent, 2017-21

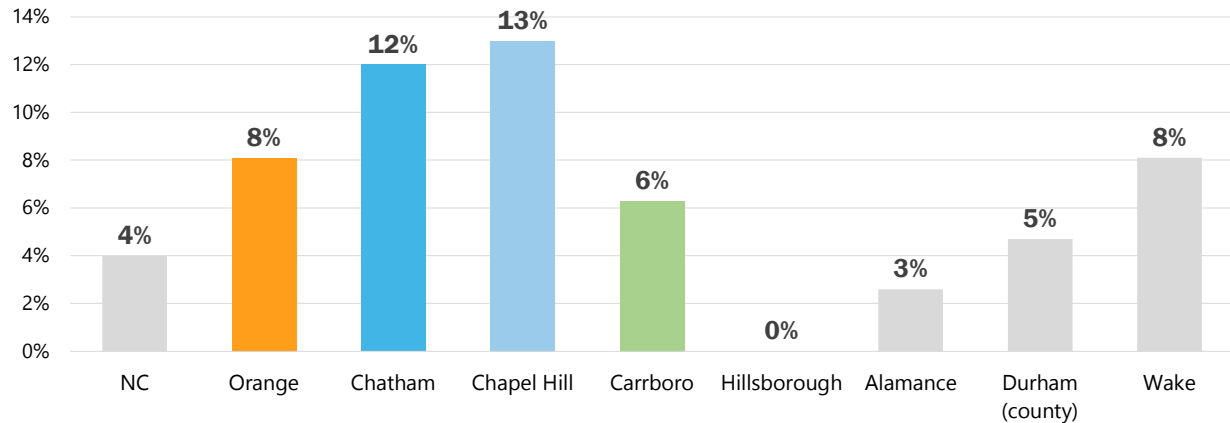


Source: American Community Survey (2017-2021 5-Year Estimates)

130

Percent of local renters paying more than \$2000/mo

Percentage of renters paying more than \$2,000 per month in rent, 2017-21

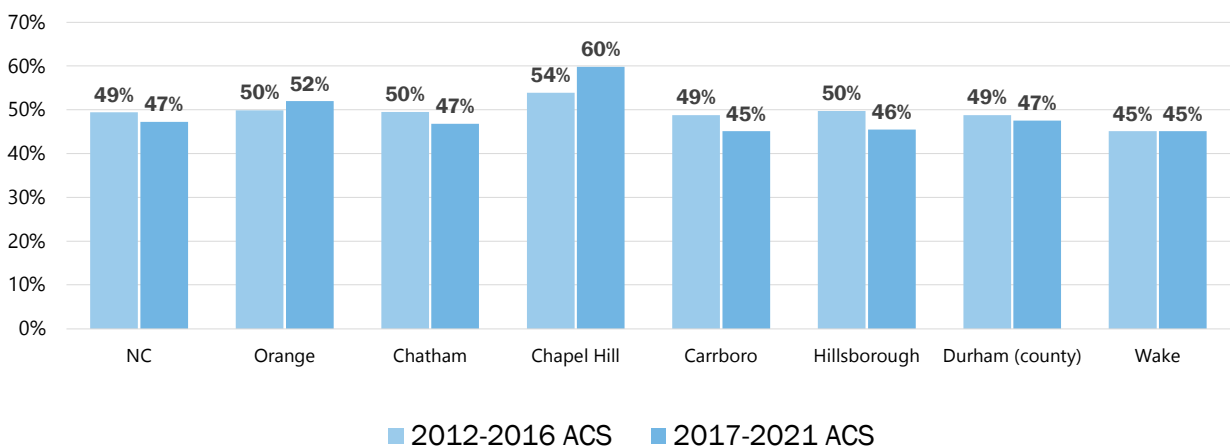


Source: American Community Survey (2017-2021 5-Year Estimates)

131

Percent of renters cost-burdened declines across the region, except Chapel Hill and Orange

Percent of cost-burdened households (households spending more than 30% of household income on rent), 2012-16 vs 2017-21



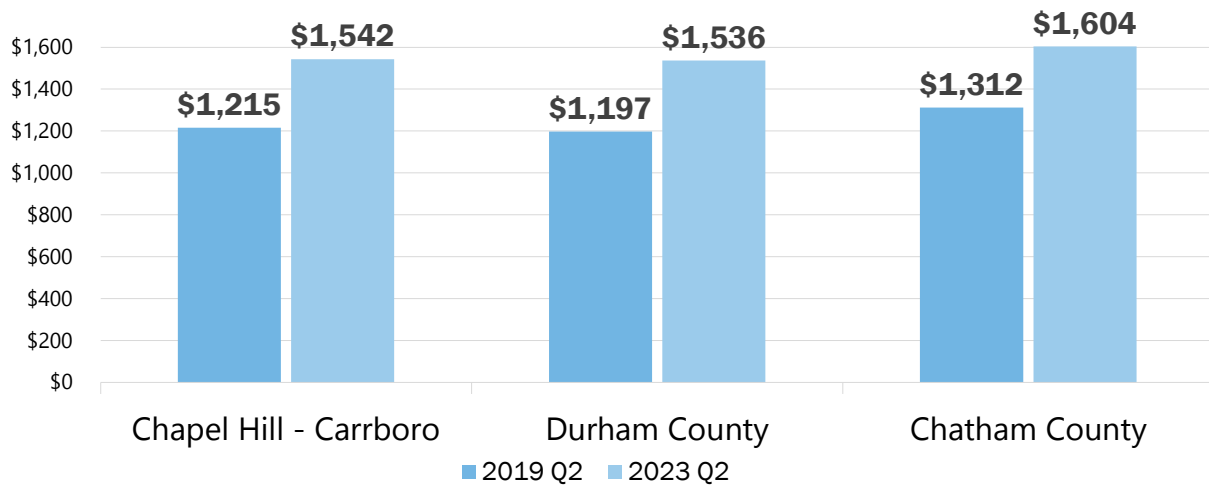
Source: American Community Survey (2017-2021 5-Year Estimates)

132

Up-to-date Local Rent from Eller Capital

133

Chapel Hill-Carrboro, Chatham, and Durham average multifamily asking rent

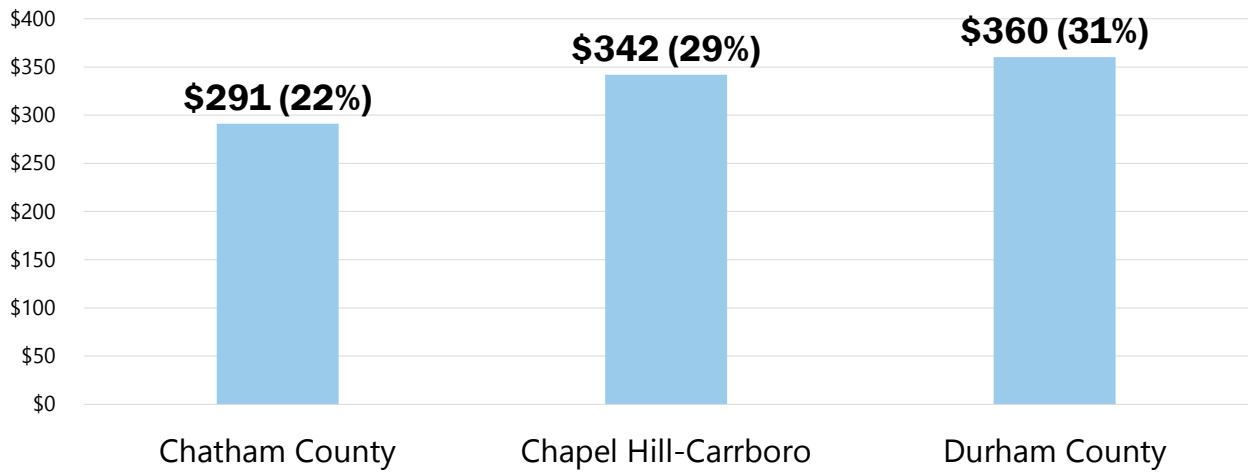


Source: Eller Capital

134

Rent has increased across the region since 2019

Growth in multifamily average annual rent from 2019 to June 2023

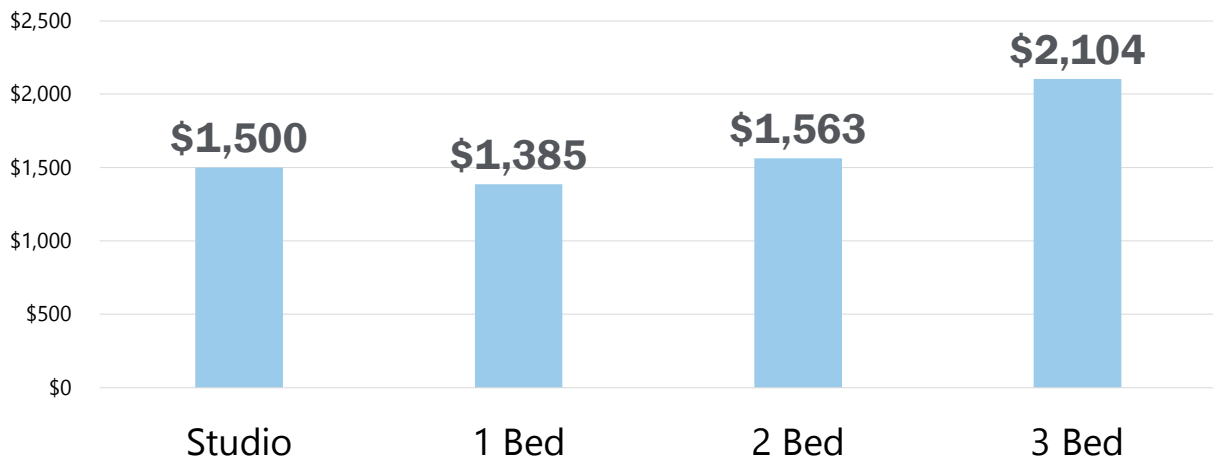


Source: Eller Capital

135

Chapel Hill-Carrboro average asking rent ranges from \$1,385 - \$2,104

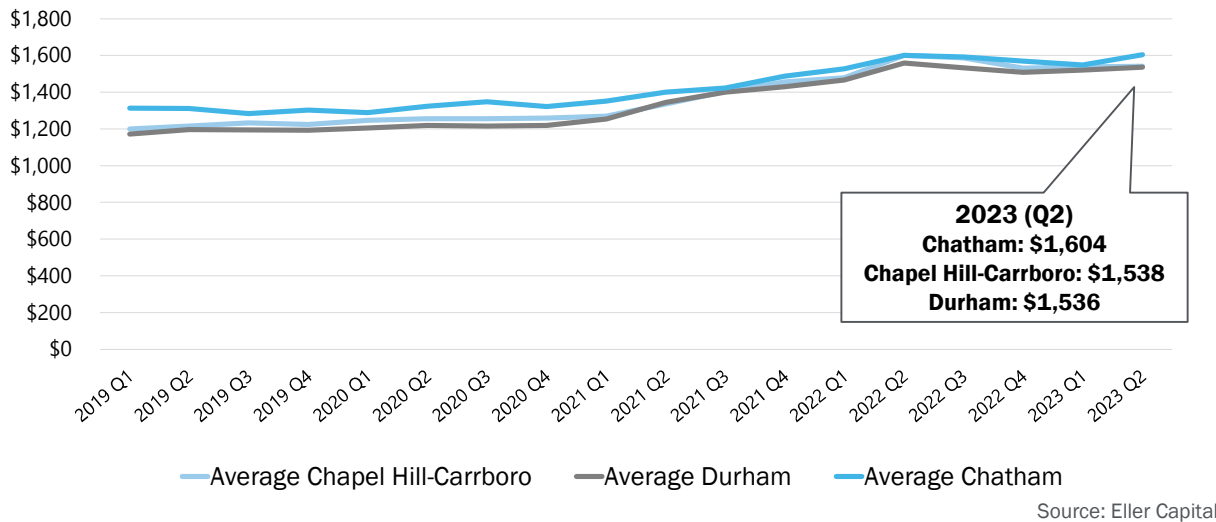
Chapel Hill-Carrboro multifamily average asking rent, 2023(Q2)



Source: Eller Capital

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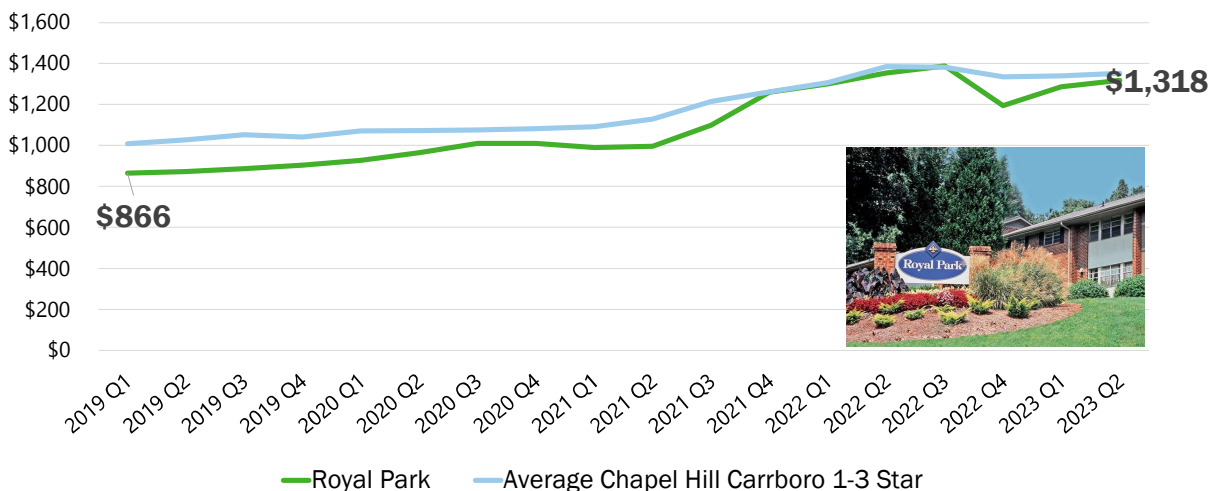
Chapel Hill-Carrboro, Chatham, and Durham average multifamily asking rent



137

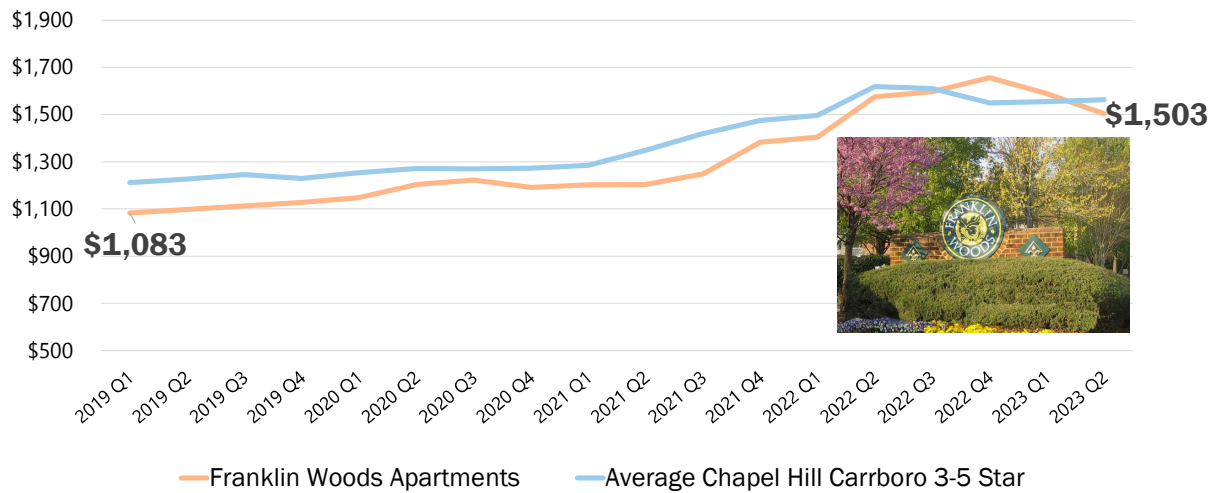
Royal Park Apartments (Carrboro) & market quarterly average asking rent 2019 to 2023

Change in average asking rent 2019Q1 through 2023Q2



138

Franklin Woods Apartments (Chapel Hill) and market average asking rent

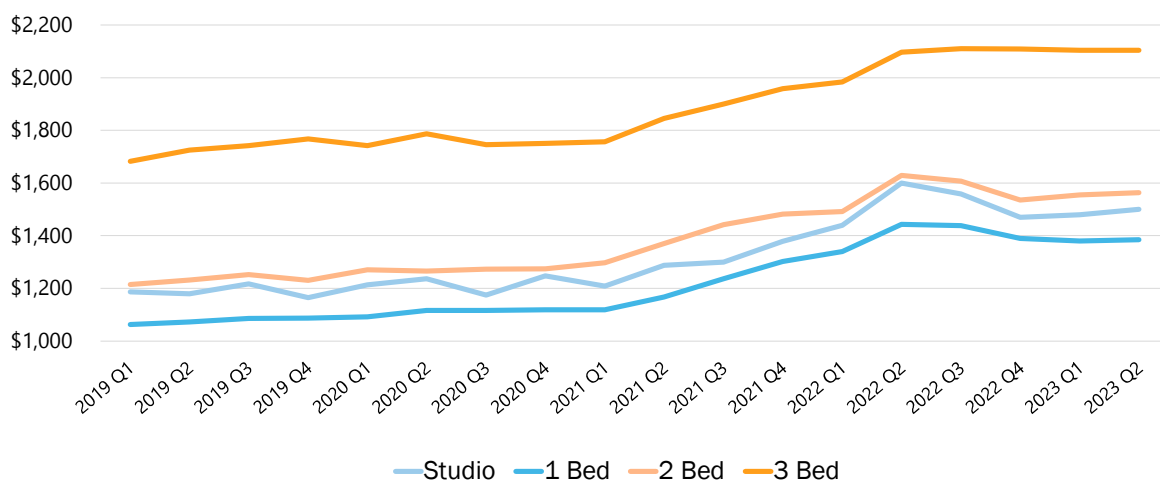


Source: Eller Capital

139

Multifamily rent prices have moderated since Q2 2020

Multifamily asking rent in Chapel Hill-Carrboro by type of unit, 2019(Q1) - 2023(Q2)

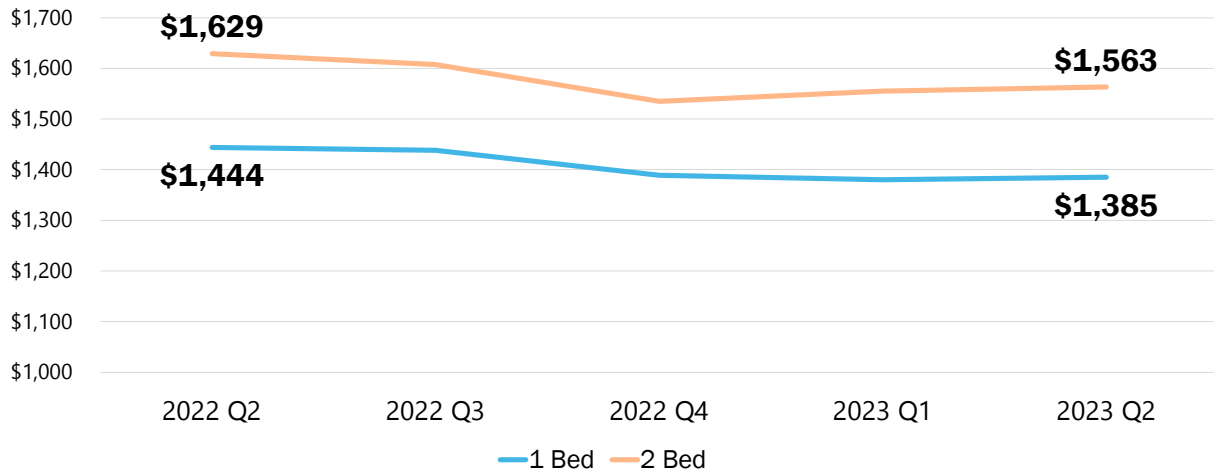


Source: Eller Capital

140

Multifamily average asking rent down 4% since 2022(Q2) for 1- and 2- bedroom in Chapel Hill-Carrboro

Multifamily asking rent in Chapel Hill-Carrboro by type of unit, 2019(Q1) to 2023(Q2)

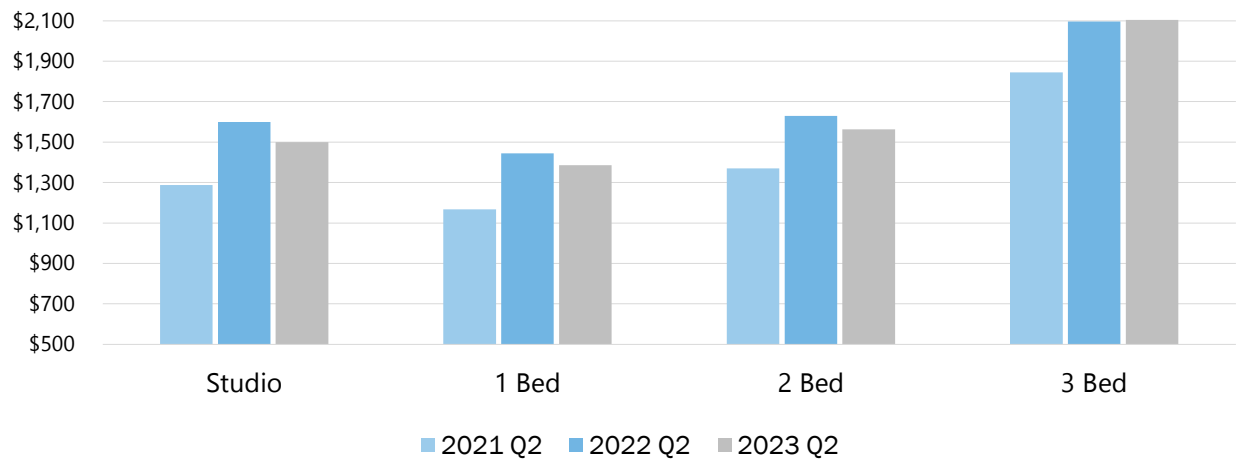


Source: Eller Capital

141

Steep rent increases have moderated since mid 2022

Chapel Hill-Carrboro multifamily average asking rent, 2021 - 2023 (Q2)



Source: Eller Capital

142

Rent & Income

143

Income needed to afford local rent

Average monthly rent and income needed to make it 'affordable.' Affordable is defined as spending no more than 30% of the pre-tax income on housing. Calculation does not include utilities.

Chapel Hill-Carrboro 2033 Q2	Average 1 bedroom	Average 2 bedroom
Average Rent	\$1,385	\$1,563
Monthly income needed to afford monthly rent	\$4,617	\$5,210
Annualized income needed to afford monthly rent	\$55,404	\$62,520
Hourly income needed to afford monthly rent	\$26.64/hour	\$30.06/hour
Number of hours at minimum wage to afford monthly rent	147 hours a week	166 hours a week

Source: Eller Capital; The chamber for a Greater Chapel Hill-Carrboro

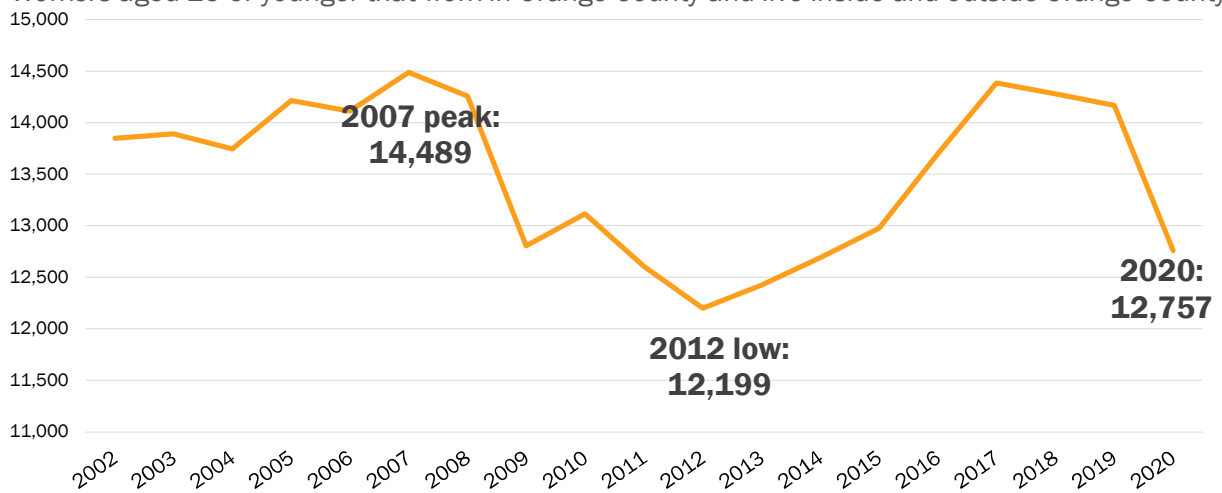
144

Young Workers

145

Total young people (≤ 29) working in Orange County

Workers aged 29 or younger that work in Orange County and live inside and outside Orange County

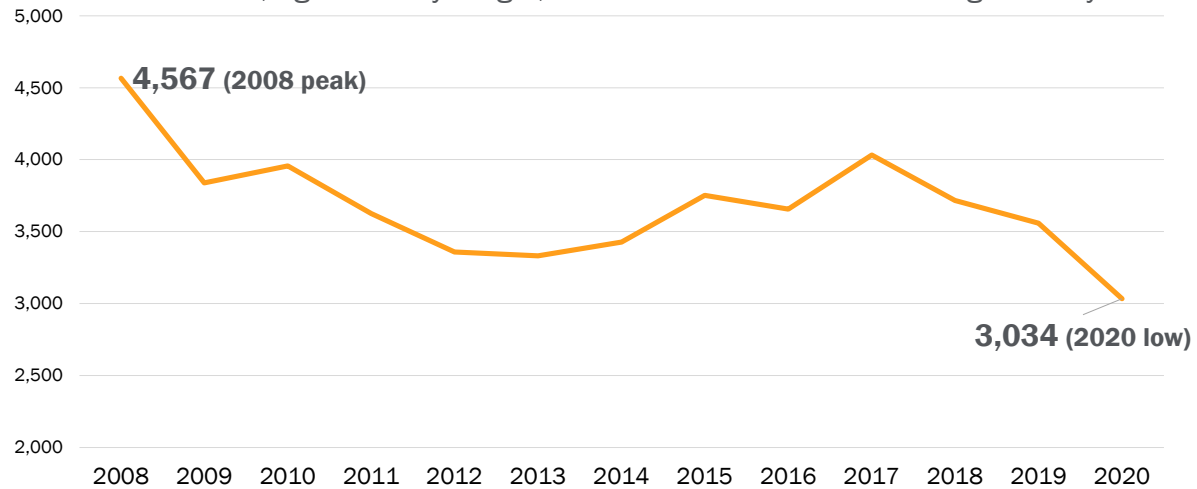


Source: US Census Bureau LODES (OnTheMap)

146

Number of young workers (≤ 29) living and working in Orange County continues to decline

Number of workers, aged 29 or younger, that both live and work in Orange County



Source: US Census Bureau LODES (OnTheMap)

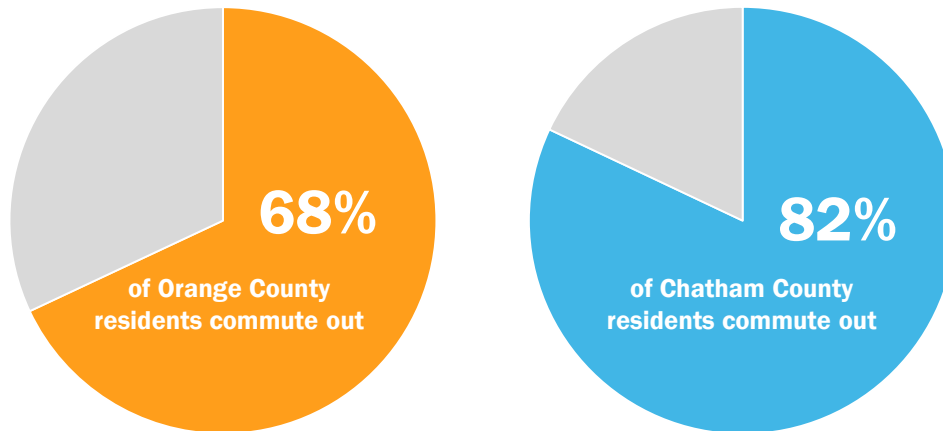
147

Commuting to Work

148

Majority of Orange and Chatham residents work outside the county in which they live

Percent of residents commuting outside of the county for work, 2020

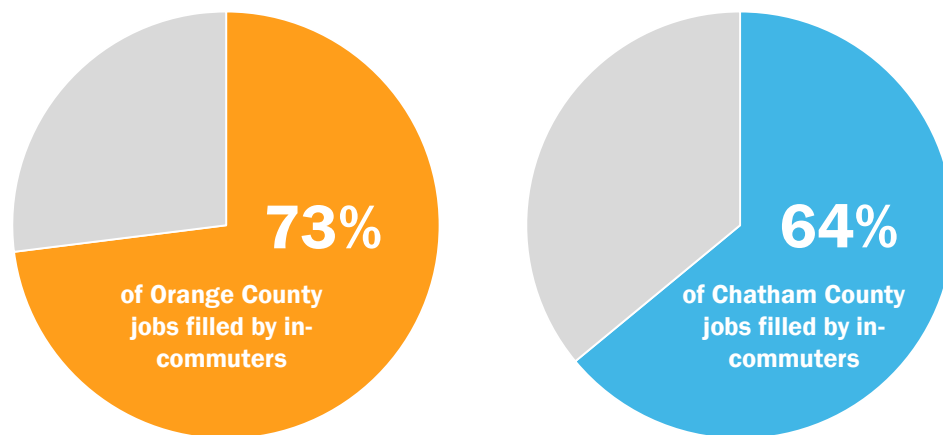


Source: US Census Bureau LODES (OnTheMap)

149

Majority of Orange and Chatham jobs filled by in-commuters

Percent of county jobs filled by in-commuters, 2020

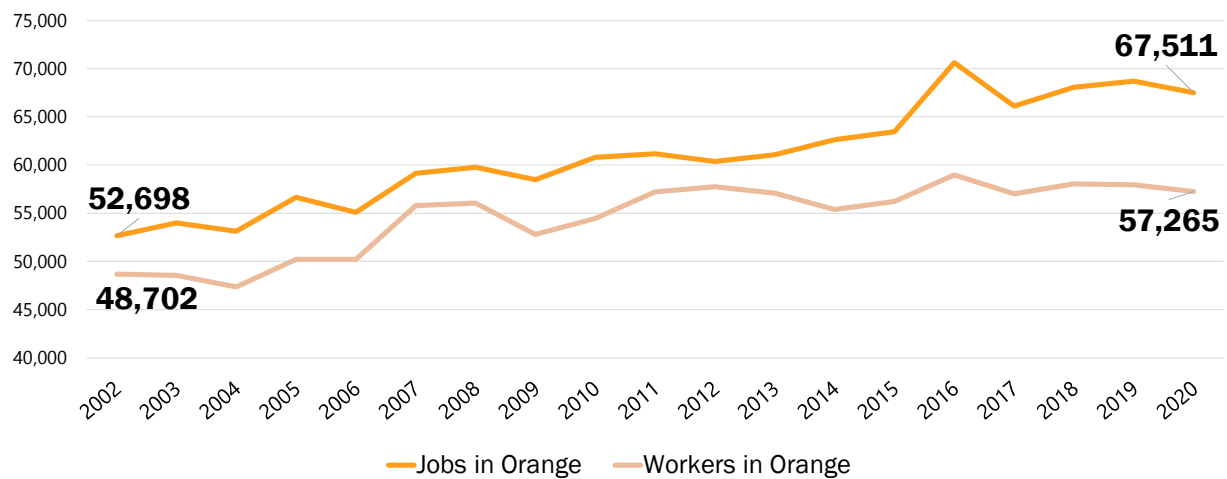


Source: US Census Bureau LODES (OnTheMap)

150

Jobs in Orange County are growing faster than workers in Orange County

Available jobs & number of workers in Orange County, 2002-2020



Source: US Census Bureau LODES (OnTheMap)

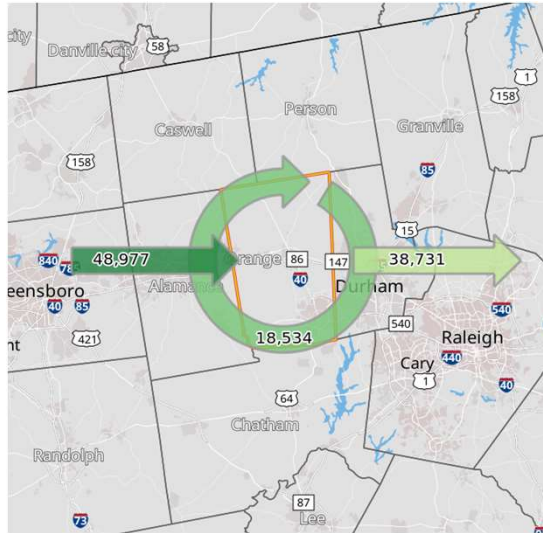
151

Worker Inflow & Outflow

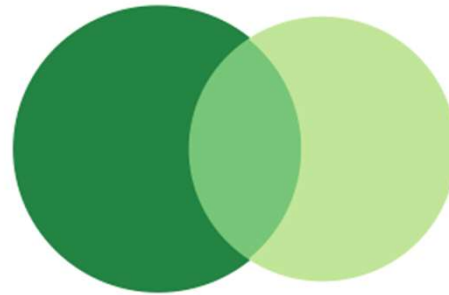
152

Orange County worker inflows/outflows, 2020

48,977 drive in, 38,731 drive out, and 18,534 live and work in Orange County



Inflow/Outflow Job Counts in 2020



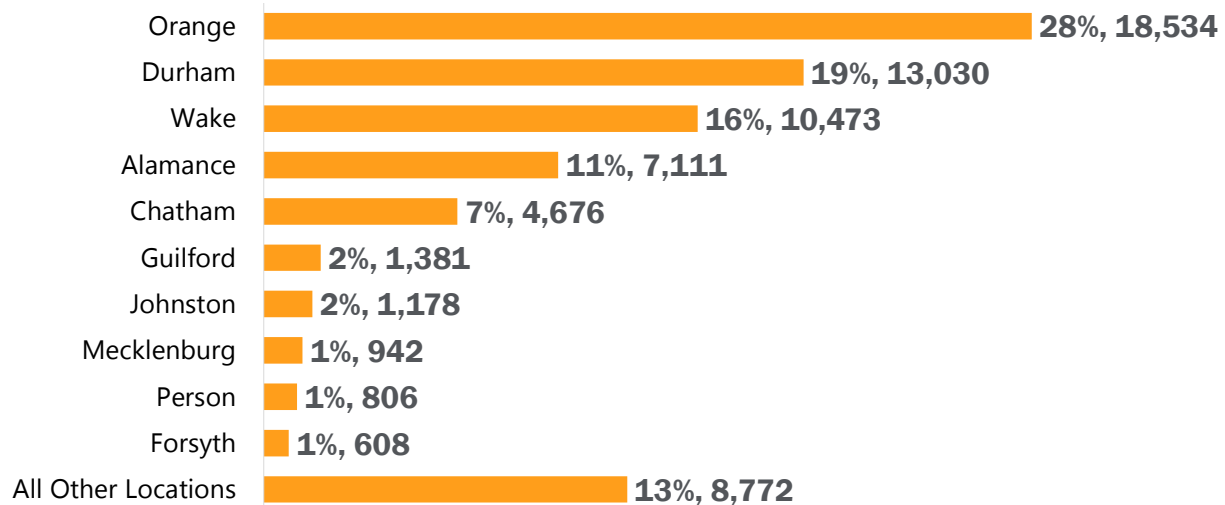
48,977 - Employed in Selection Area, Live Outside
 38,731 - Live in Selection Area, Employed Outside
 18,534 - Employed and Live in Selection Area

Source: US Census Bureau LODS (OnTheMap)

153

Where do Orange County's 67,511 workers live?

Orange County workers by county of residence, 2020

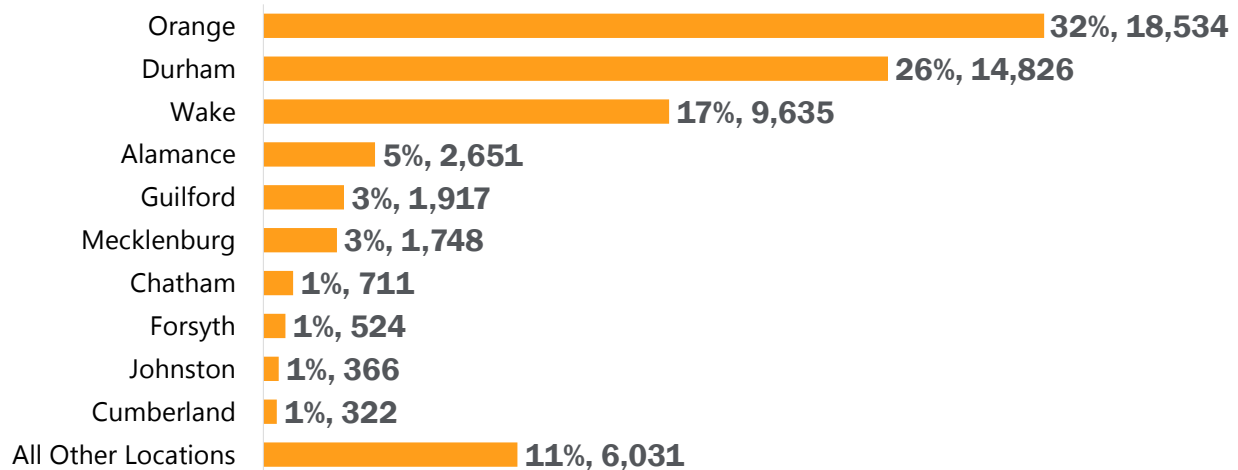


Source: US Census Bureau LODS (OnTheMap)

154

Where do Orange County's 57,265 working residents work?

Location of primary job for residents of Orange County, 2020

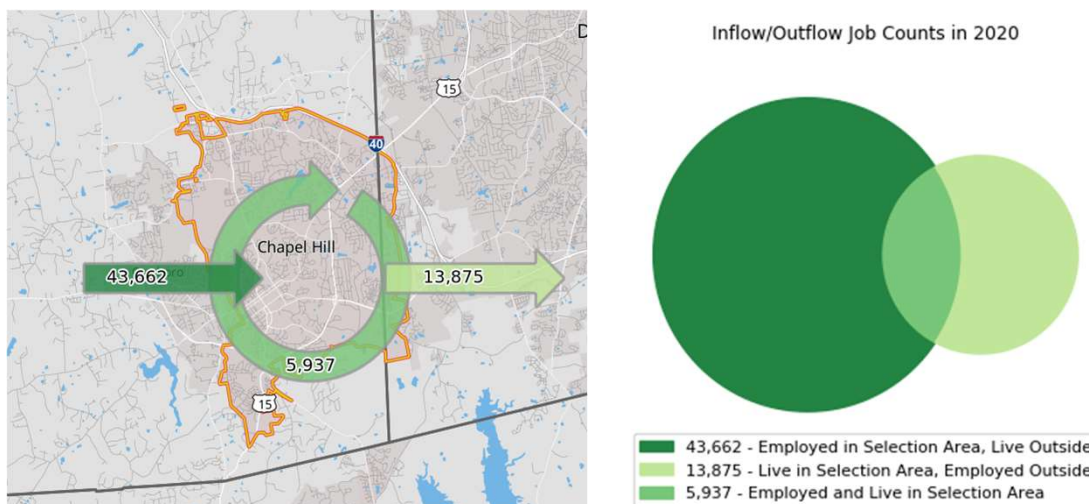


Source: US Census Bureau LODS (OnTheMap)

155

Chapel Hill worker inflows/outflows, 2020

43,662 drive in, 13,875 drive out, and 5,937 live and work in Chapel Hill

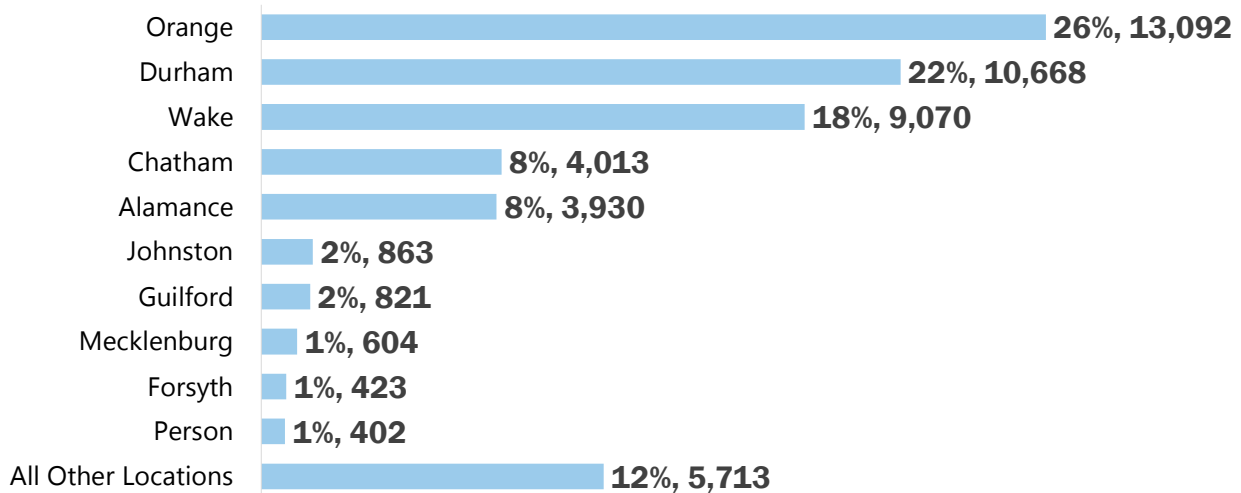


Source: US Census Bureau LODS (OnTheMap)

156

Where do Chapel Hill's 49,599 workers live?

Chapel Hill workers by county of residence, 2020

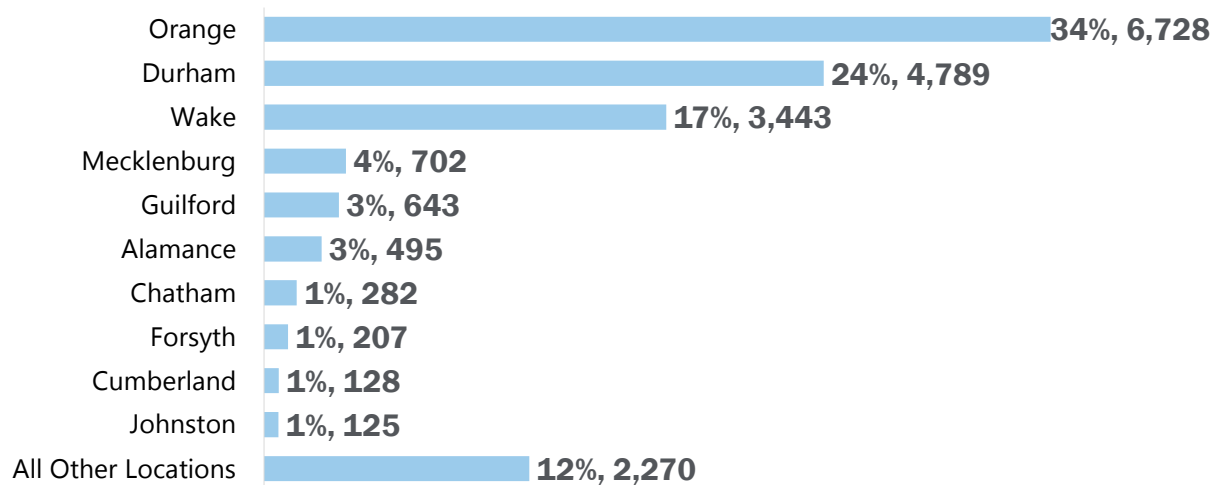


Source: American Community Survey (2017-2021 5-Year Estimates)

157

Where do Chapel Hill's 19,812 working residents work?

Location of primary job for residents of Chapel Hill, 2020

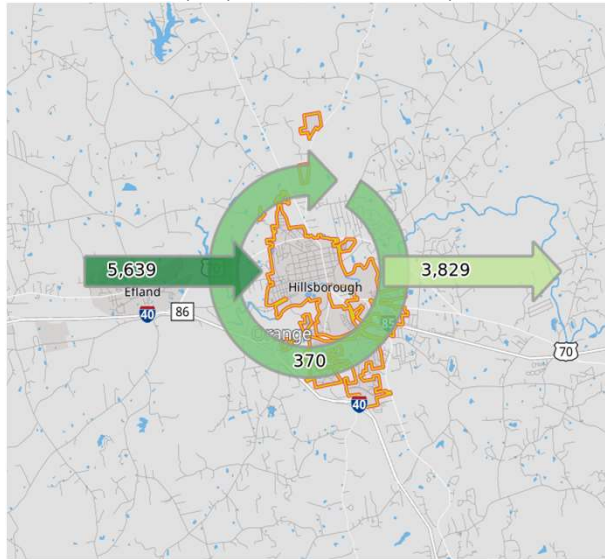


Source: US Census Bureau LODES (OnTheMap)

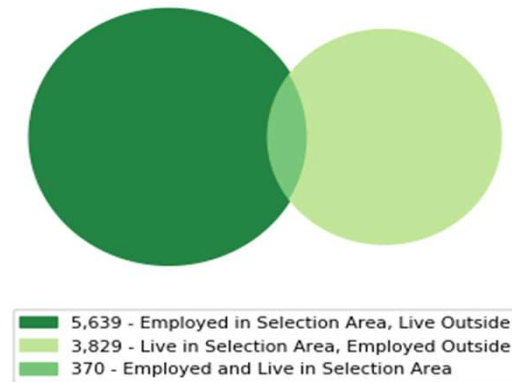
158

Hillsborough worker inflows/outflows, 2020

5,639 drive in, 3,829 drive out, and 370 live and work in Hillsborough



Inflow/Outflow Job Counts in 2020



Source: US Census Bureau LODS (OnTheMap)

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A conversation with Mayor Hemminger

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Mayor Pam Hemminger
Town of Chapel Hill



#DataDive2023

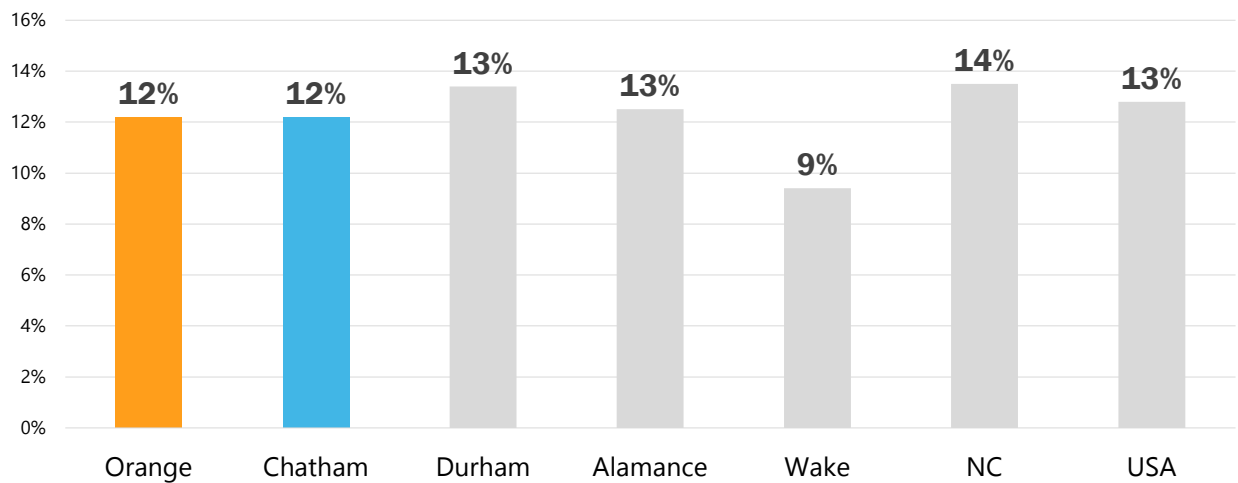
161

Poverty & Food Insecurity

162

Wake County has the lowest local poverty rate

Percent of people (all ages) in poverty, 2021

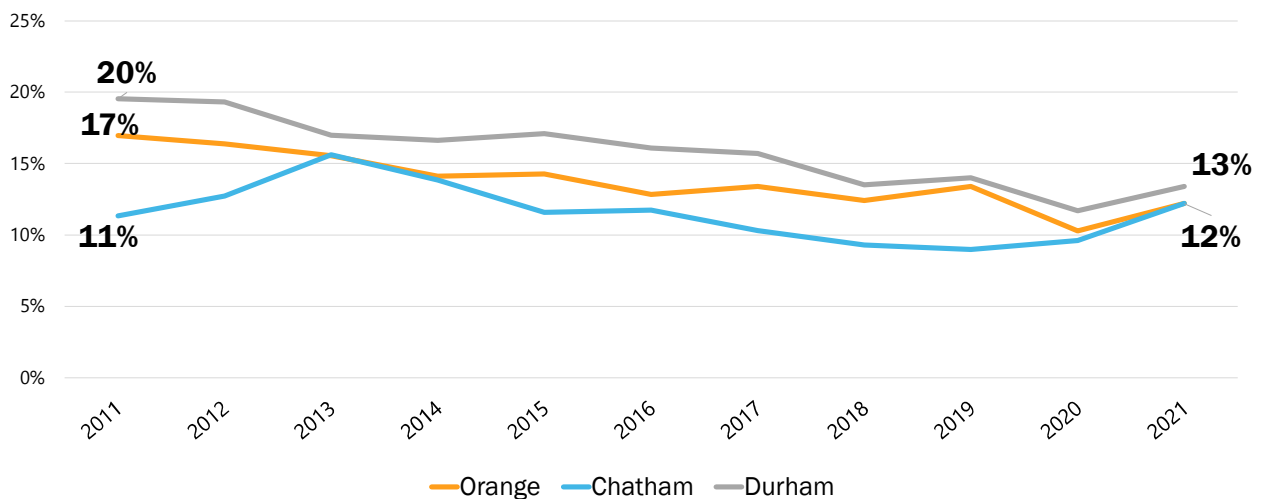


Source: US Census Bureau Small Area Income and Poverty Estimates (SAIPE)

163

Local poverty rates are declining over the decade

Percent of people (all ages) in poverty, 2001-2021

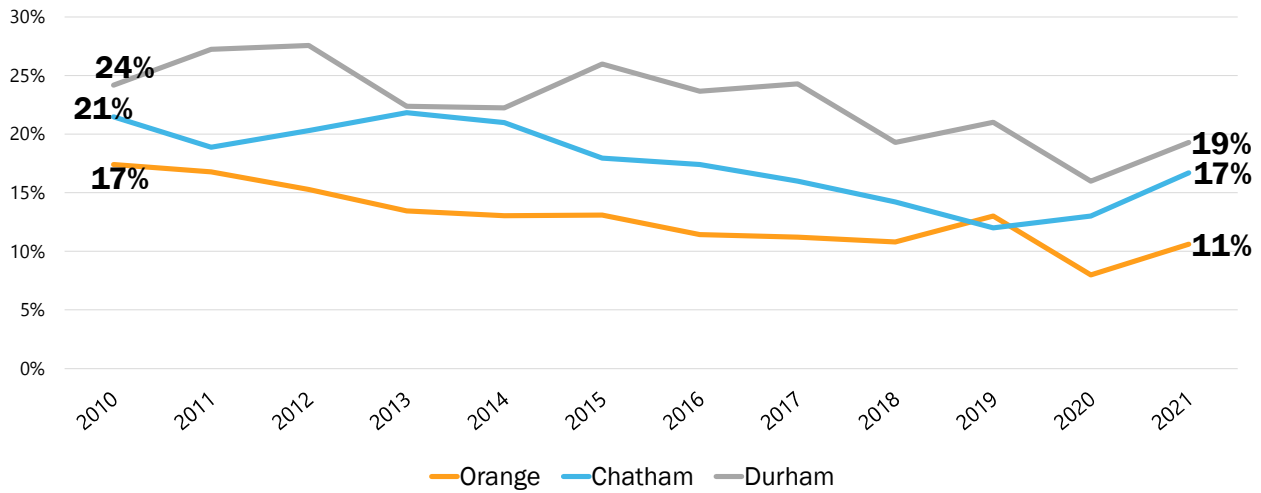


Source: US Census Bureau Small Area Income and Poverty Estimates (SAIPE)

164

Children in poverty rate declining with slight uptick in 2021

Percent of children (under 18) in poverty, 2001-2021

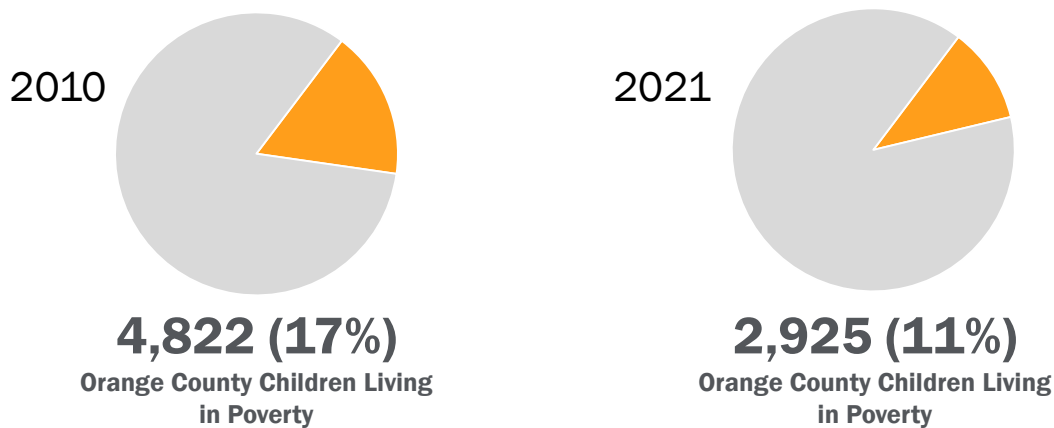


Source: US Census Bureau Small Area Income and Poverty Estimates (SAIPE)

165

Orange County Children in poverty

Percentage of children living in poverty, 2010 and 2021

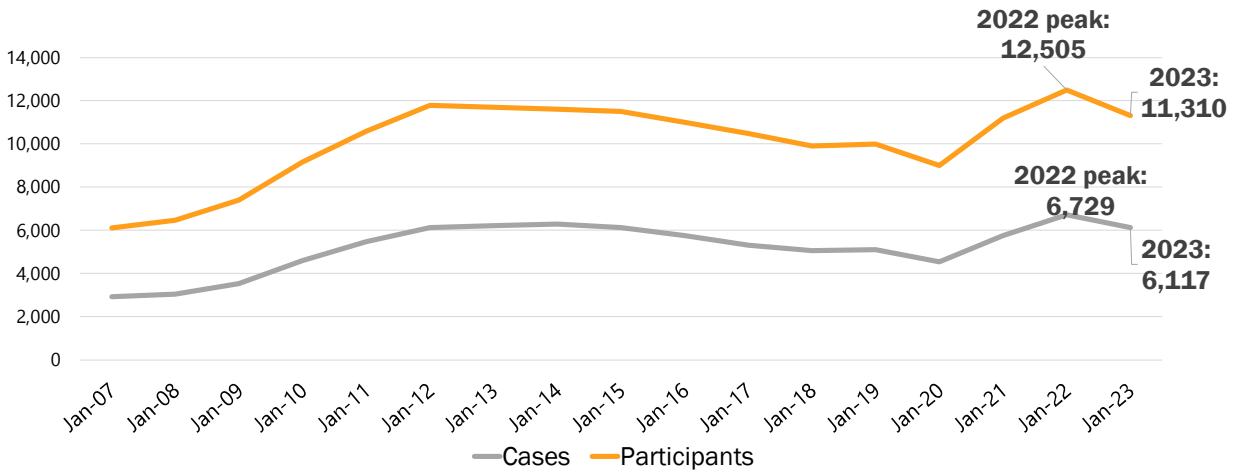


Source: US Census Bureau Small Area Income and Poverty Estimates (SAIPE)

166

Orange County FNS cases + participants, 2007-2023

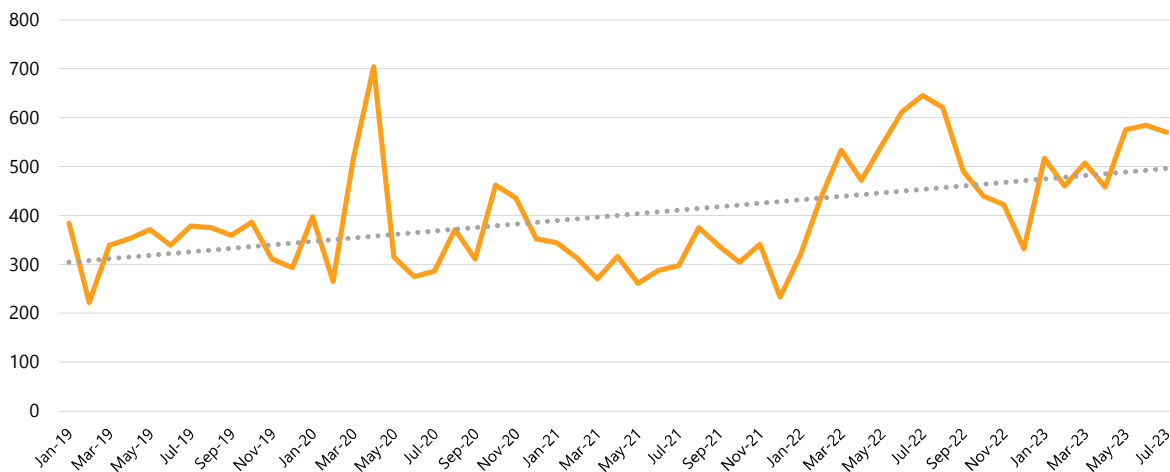
Number of cases (families) and participants (individuals) receiving Orange County Food and Nutrition Services (FNS, formerly Food Stamps) in January each year 2007 through 2023



Source: NC Department of Health and Human Services

167

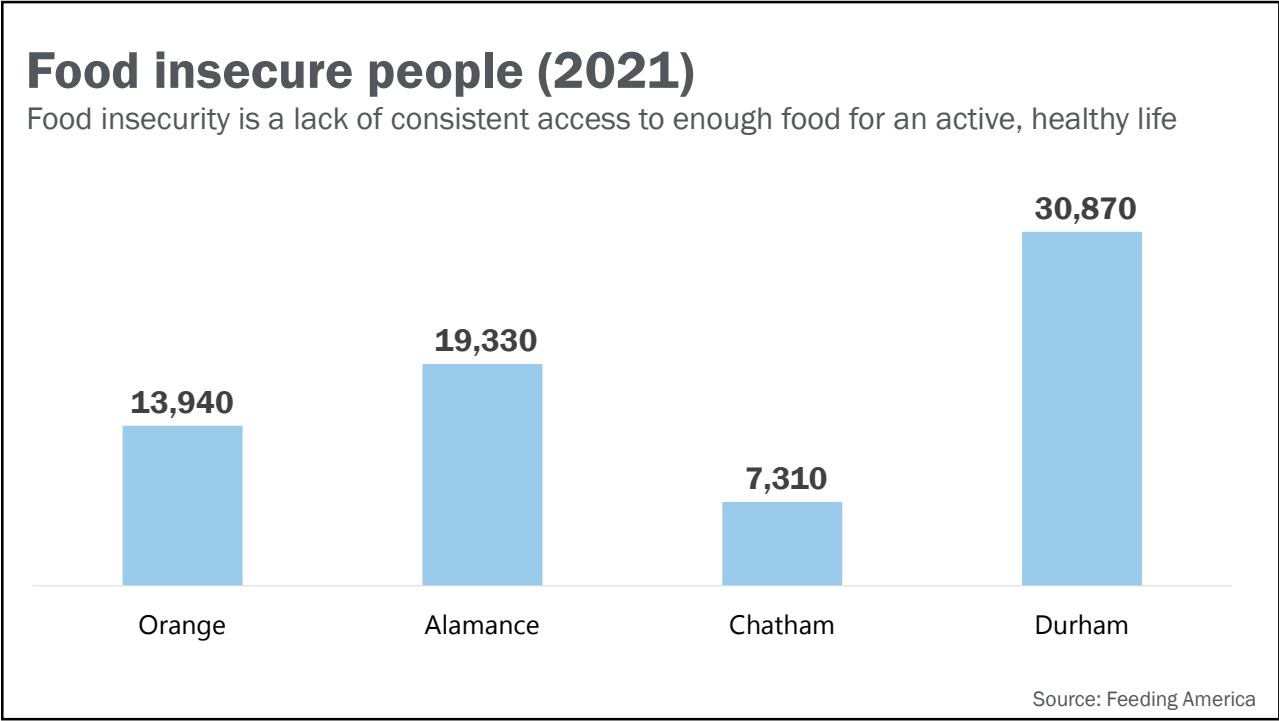
Orange County Food and Nutrition Services monthly applications Jan 2019 to July 2023



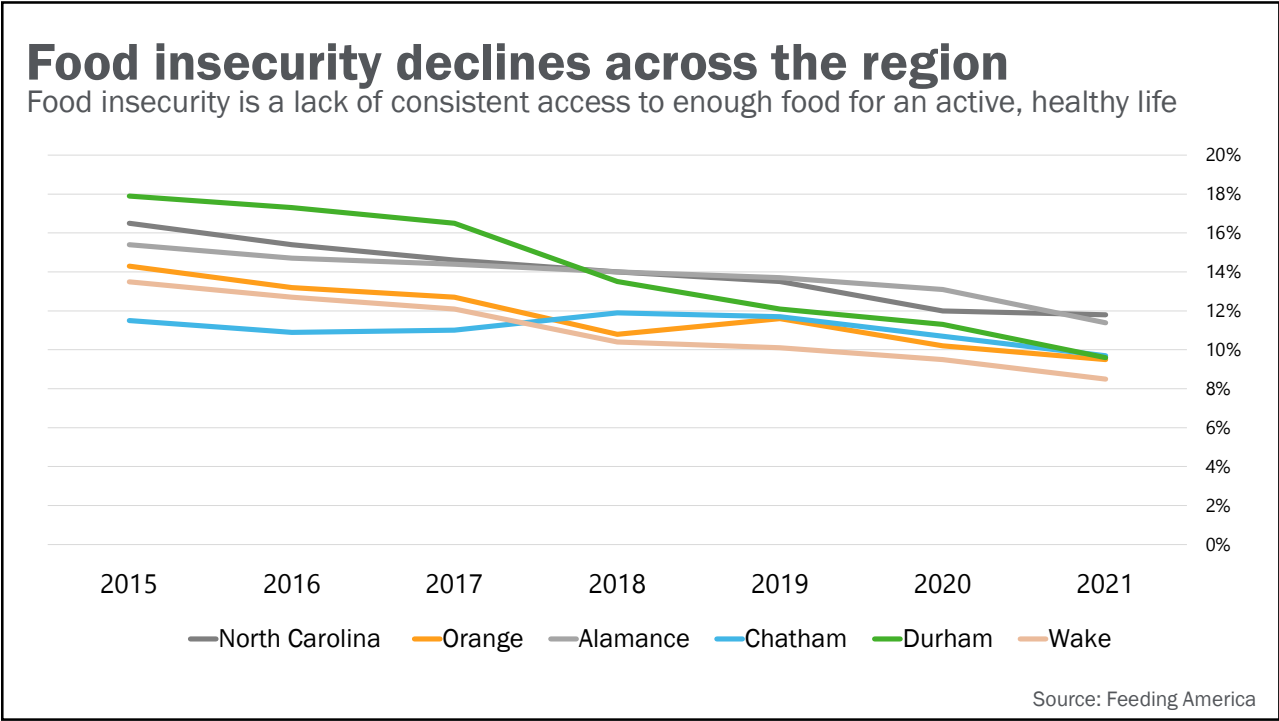
*Nov-21 is an average of Oct-21 & Dec-21

Source: NC Department of Health and Human Services

168



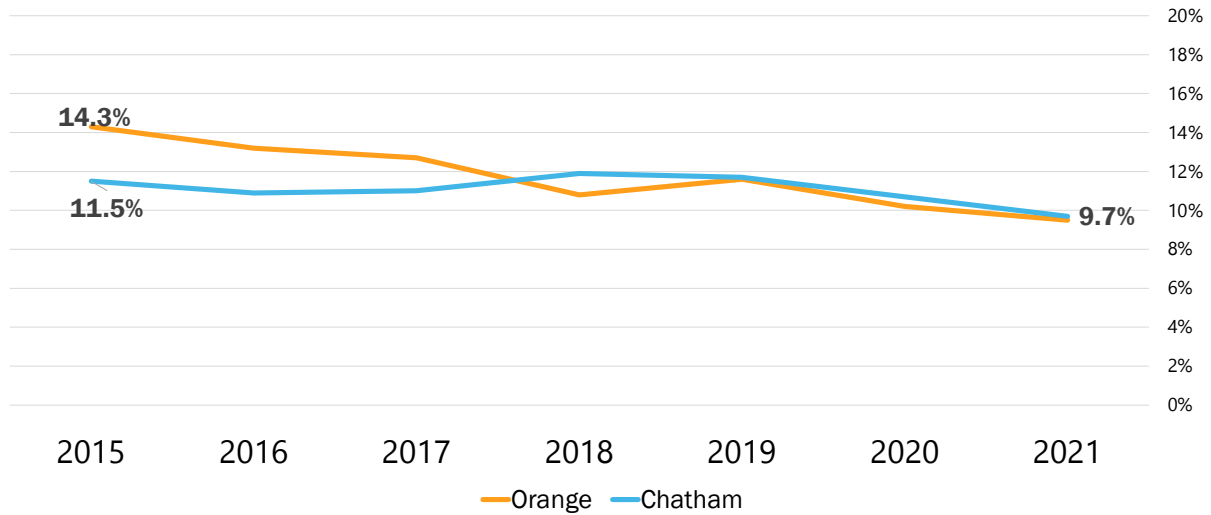
169



170

Food insecurity declines across the region

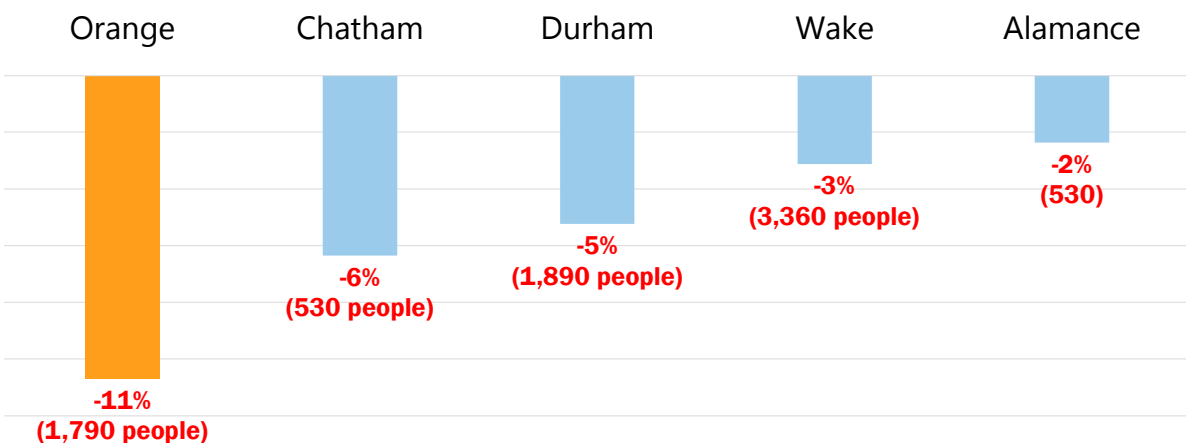
Food insecurity is a lack of consistent access to enough food for an active, healthy life



171

Number of food insecure people declines by 11% (1,790 people) in Orange County between 2019-2021

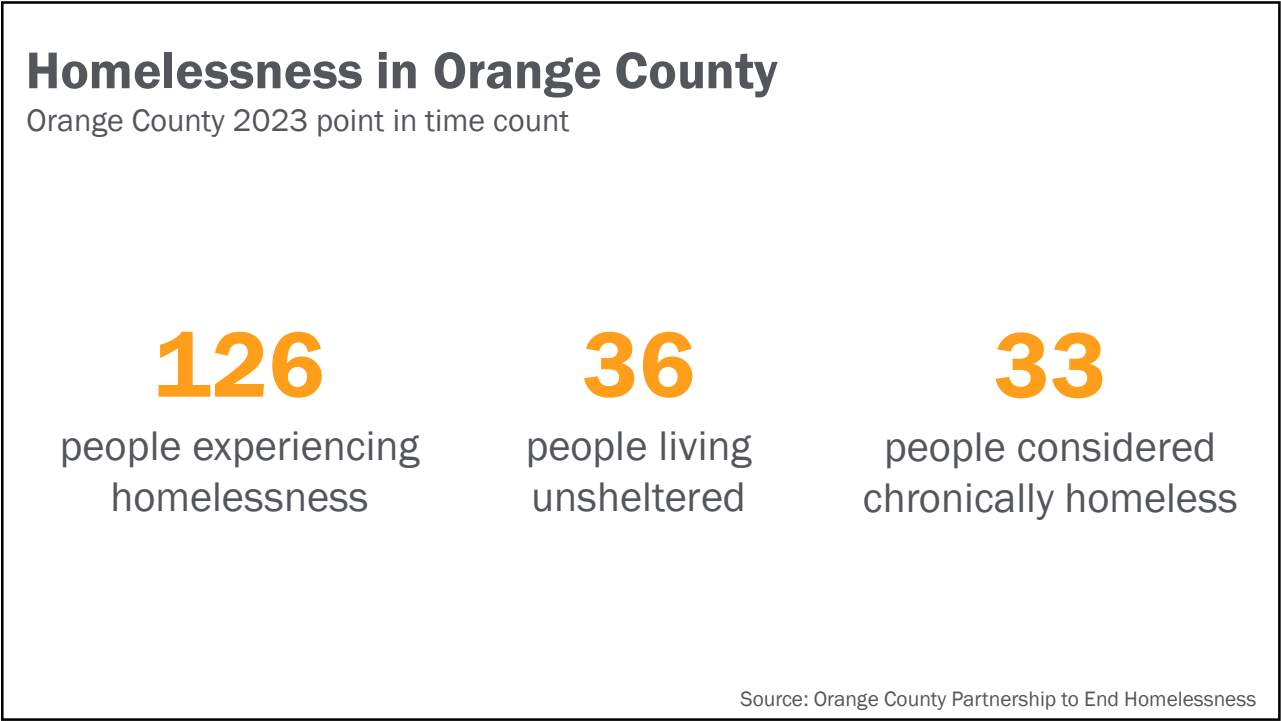
Percentage decline in number of food insecure people, 2019 vs 2021. Food insecurity is a lack of consistent access to enough food for an active, healthy life



172



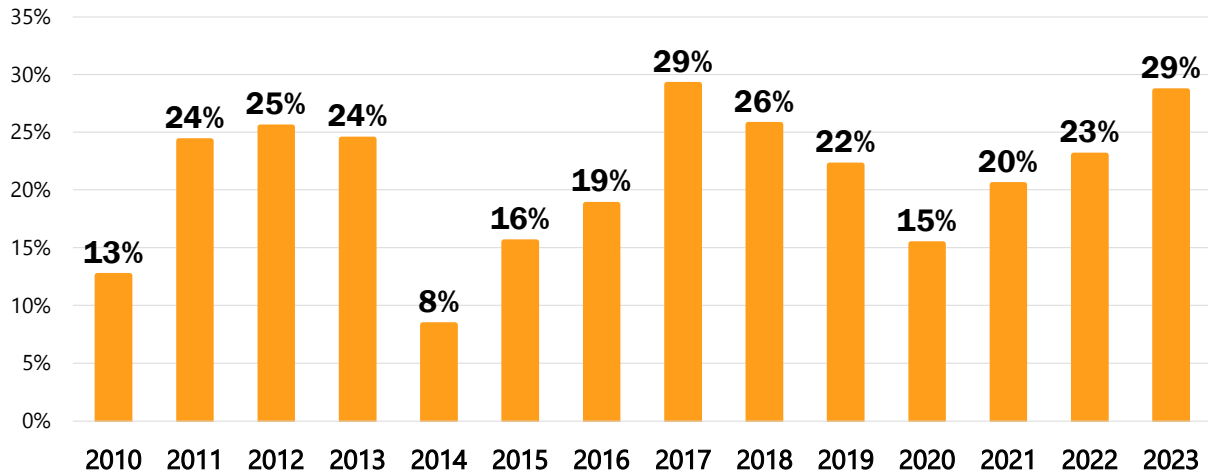
173



174

Percent of Orange County homeless living unsheltered

Orange County annual point in time count, 2010-2023

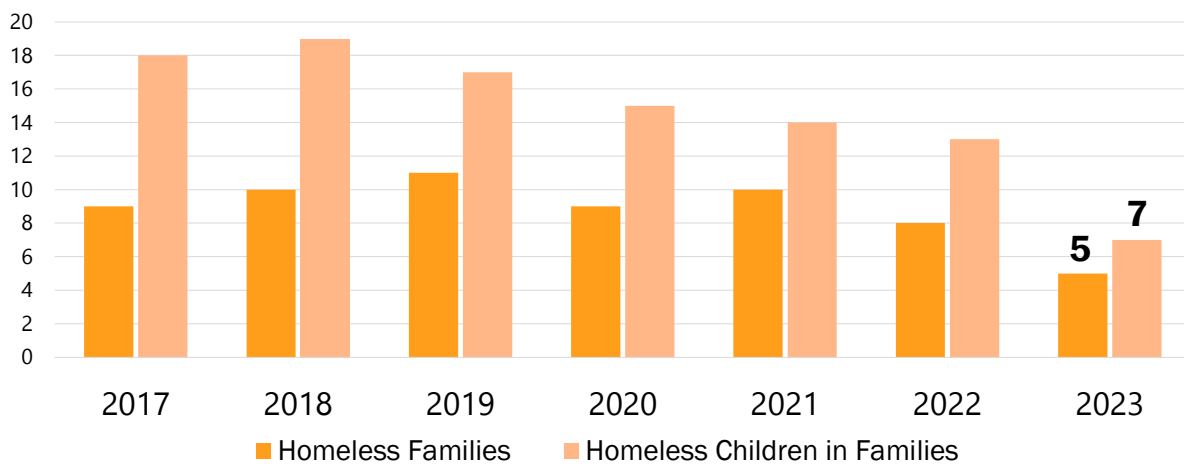


Source: Orange County Partnership to End Homelessness

175

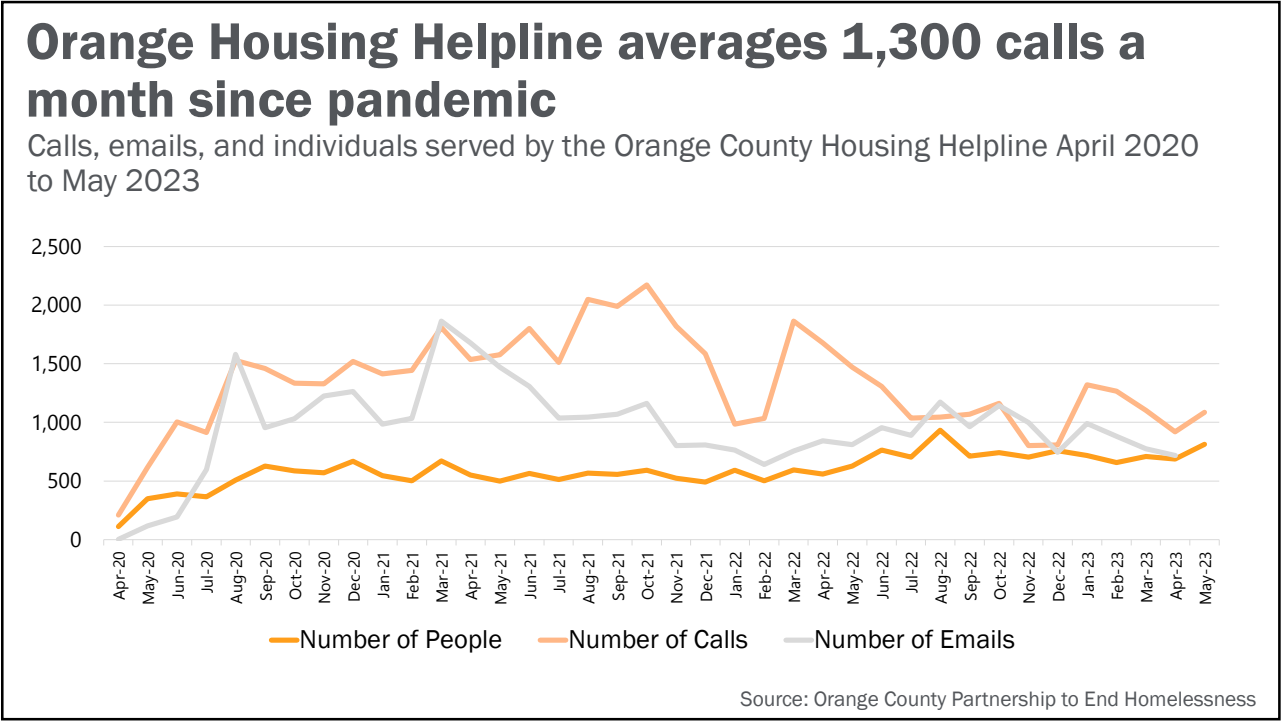
Orange County homeless children and families

Orange County annual point in time count, 2010-2023



Source: Orange County Partnership to End Homelessness

176



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Health Indicators

178

Orange ranks 1st in health behaviors, clinical care, + social/economic factors

County rank out of NC's 100 counties

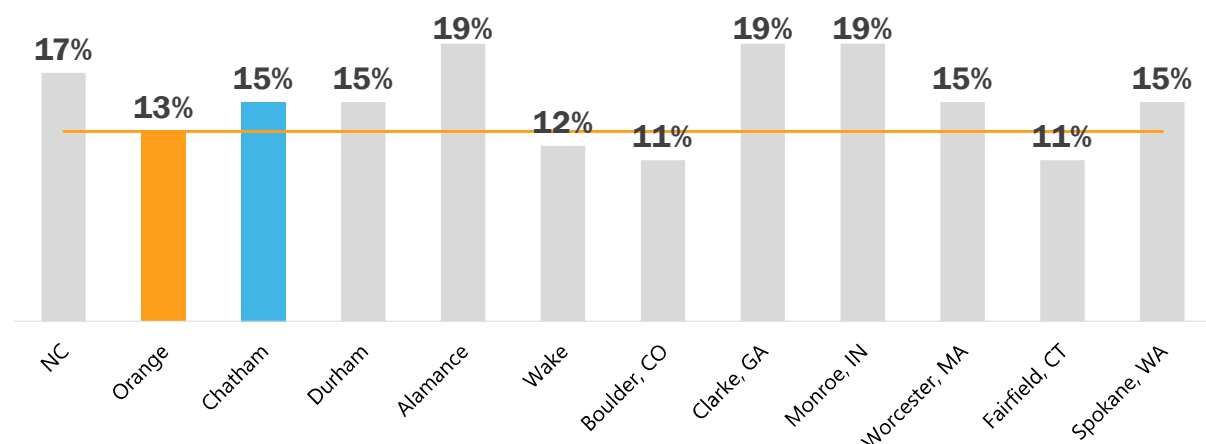
	Orange	Chatham	Durham	Who is #1
Length of Life	2	14	7	Wake
Quality of Life	3	11	19	Wake
Health Behaviors	1	4	12	Orange
Clinical Care	1	5	6	Orange
Social and Economic Factors	1	18	13	Orange
Physical Environment	7	28	20	New Hanover

Source: 2023 Robert Wood Johnson Foundation Health Rankings

179

Adult smoking

Percentage of adults who are current smokers



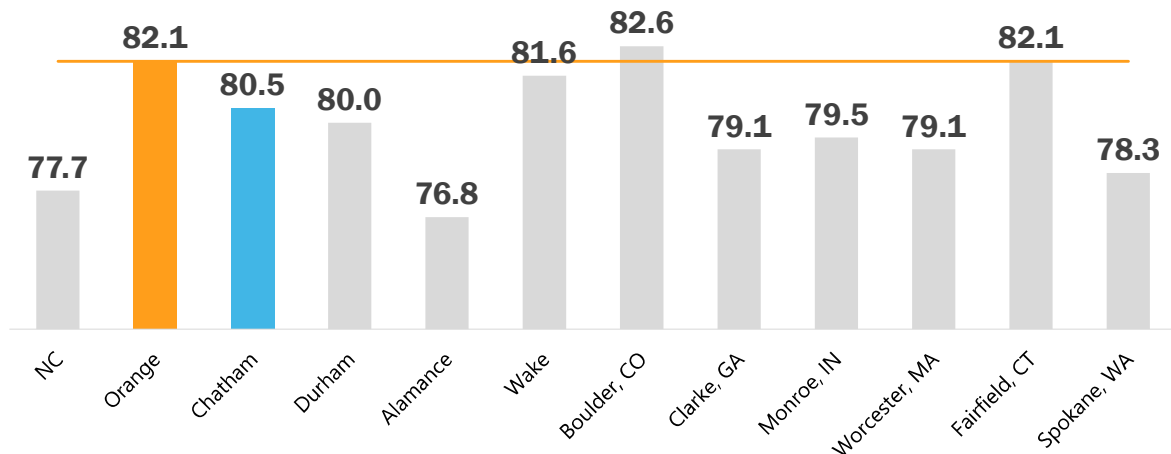
Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2023 Robert Wood Johnson Foundation Health Rankings

180

Life expectancy

Average number of years a person can expect to live



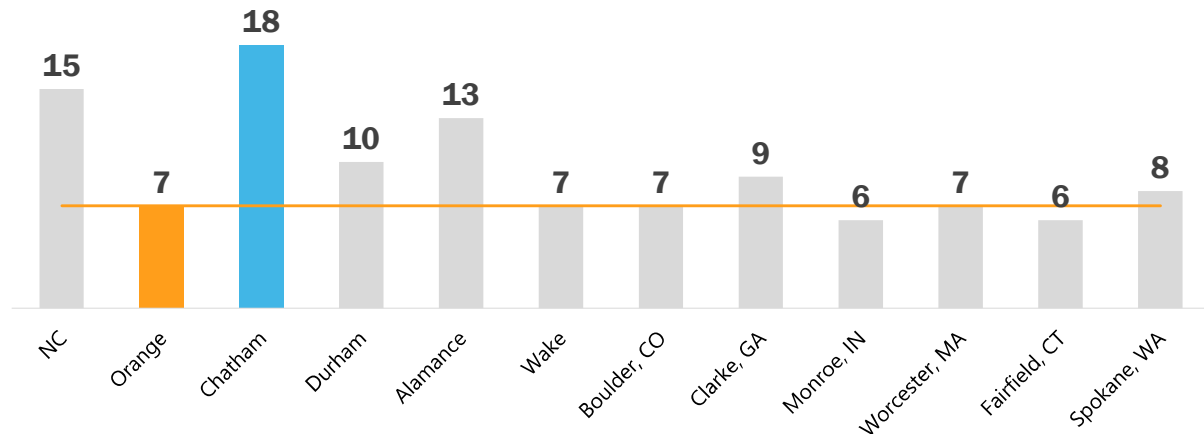
Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2023 Robert Wood Johnson Foundation Health Rankings

181

Motor vehicle crash deaths

Number of motor vehicle crash deaths per 100,000 population



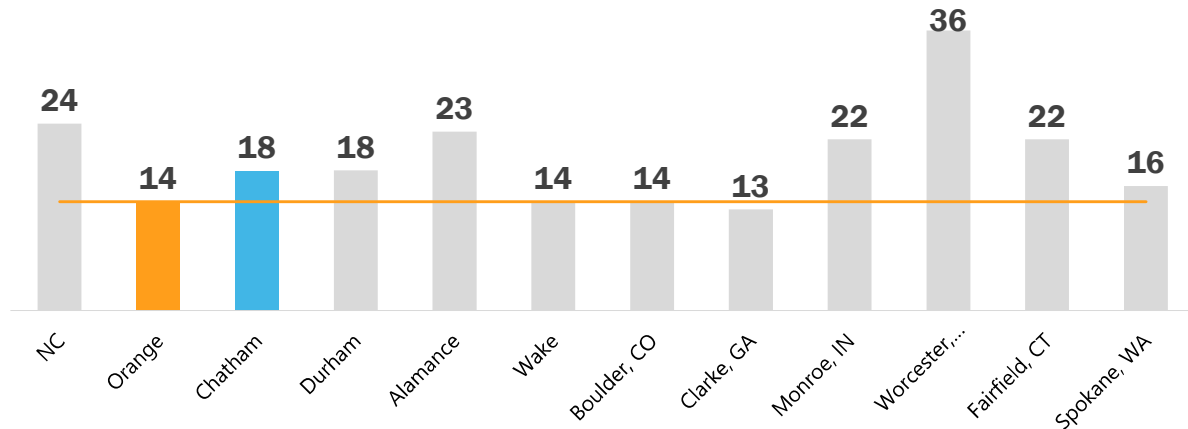
Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2023 Robert Wood Johnson Foundation Health Rankings

182

Drug overdose deaths

Number of drug poisoning deaths per 100,000 population



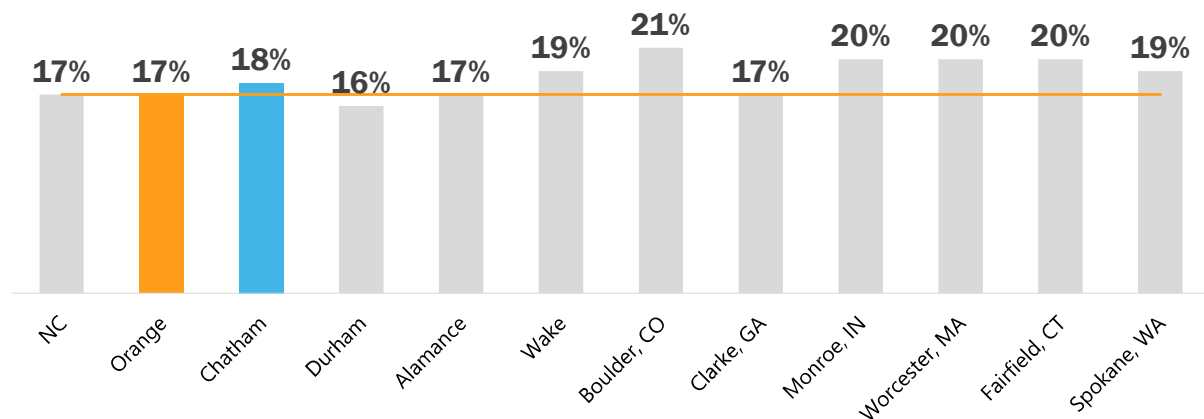
Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2023 Robert Wood Johnson Foundation Health Rankings

183

Excessive drinking

Percentage of adults who report binge or heavy drinking



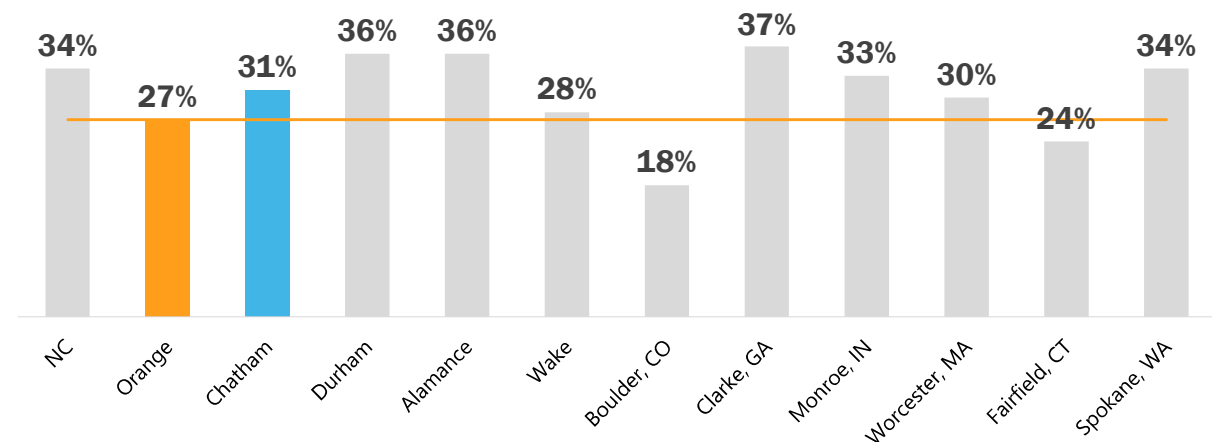
Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2023 Robert Wood Johnson Foundation Health Rankings

184

Adults with obesity

Percentage of the adult population (age 20+) that reports a body mass index (BMI) > 30



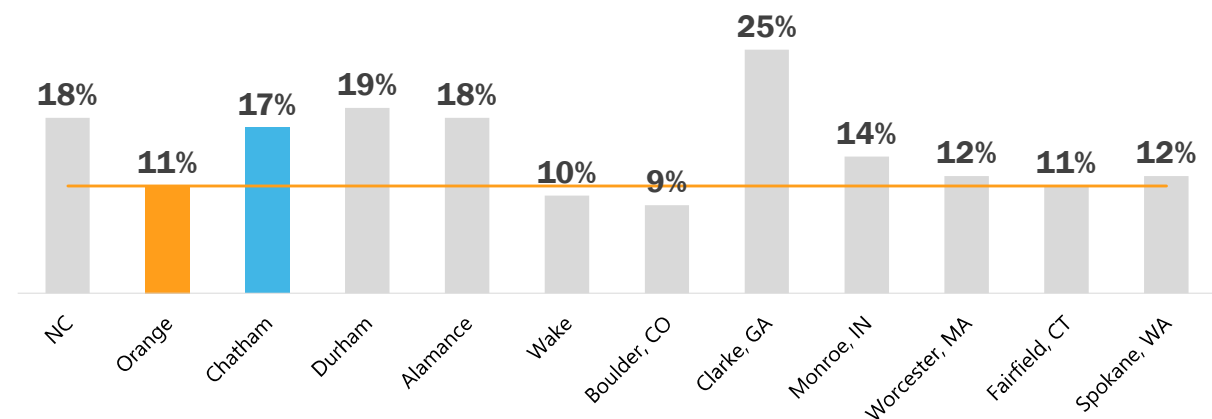
Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2023 Robert Wood Johnson Foundation Health Rankings

185

Children in poverty

Percent of people under the age of 18 living in poverty



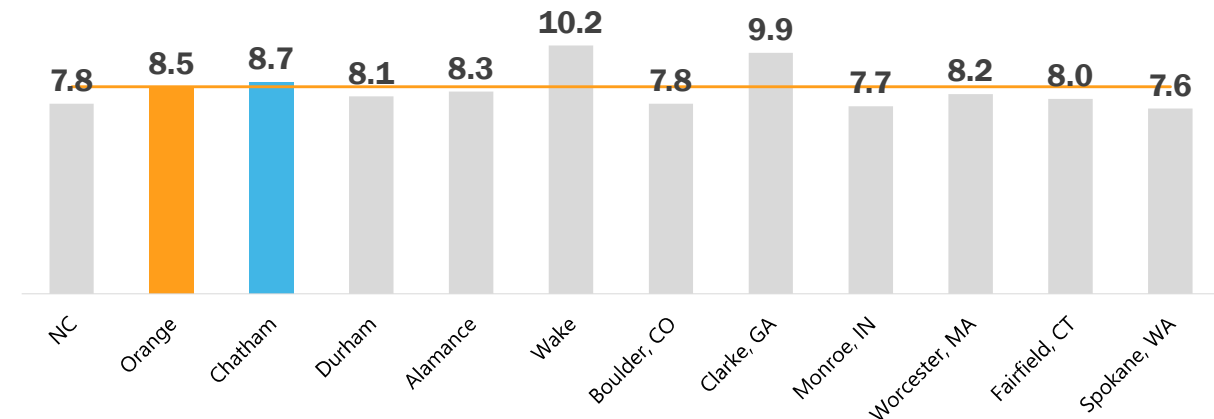
Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2023 Robert Wood Johnson Foundation Health Rankings

186

Air pollution: particulate matter

Average daily density of fine particulate matter in micrograms per cubic meter (PM2.5)



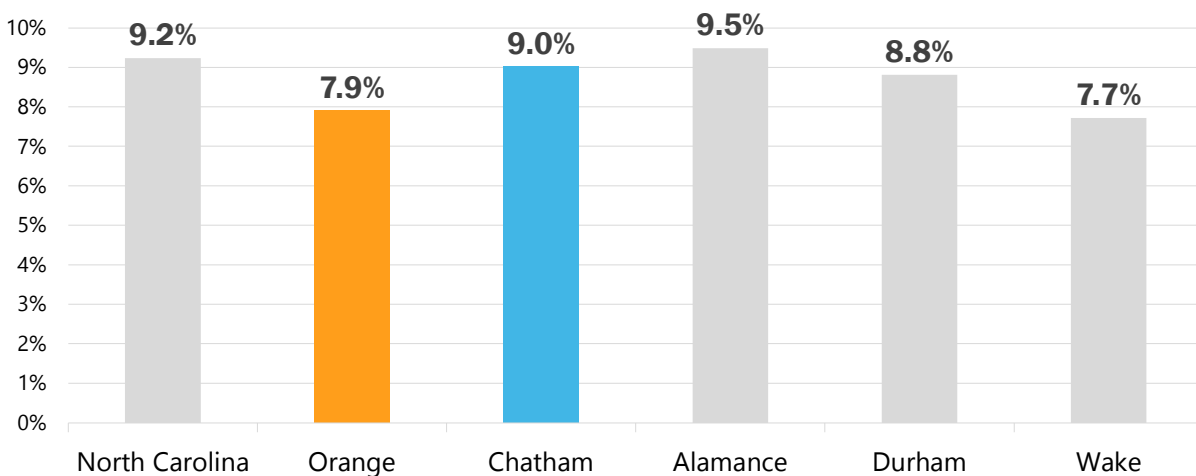
Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2023 Robert Wood Johnson Foundation Health Rankings

187

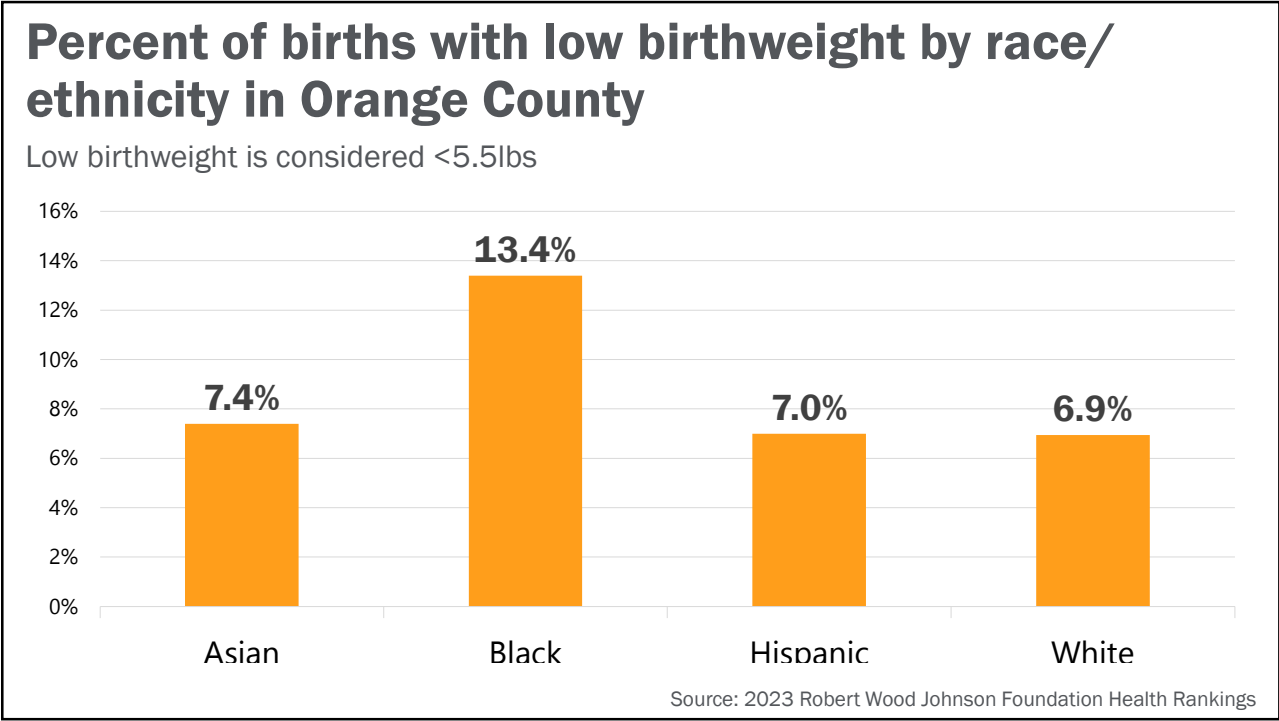
Percent of births with low birthweight

Low birthweight is considered <5.5lbs

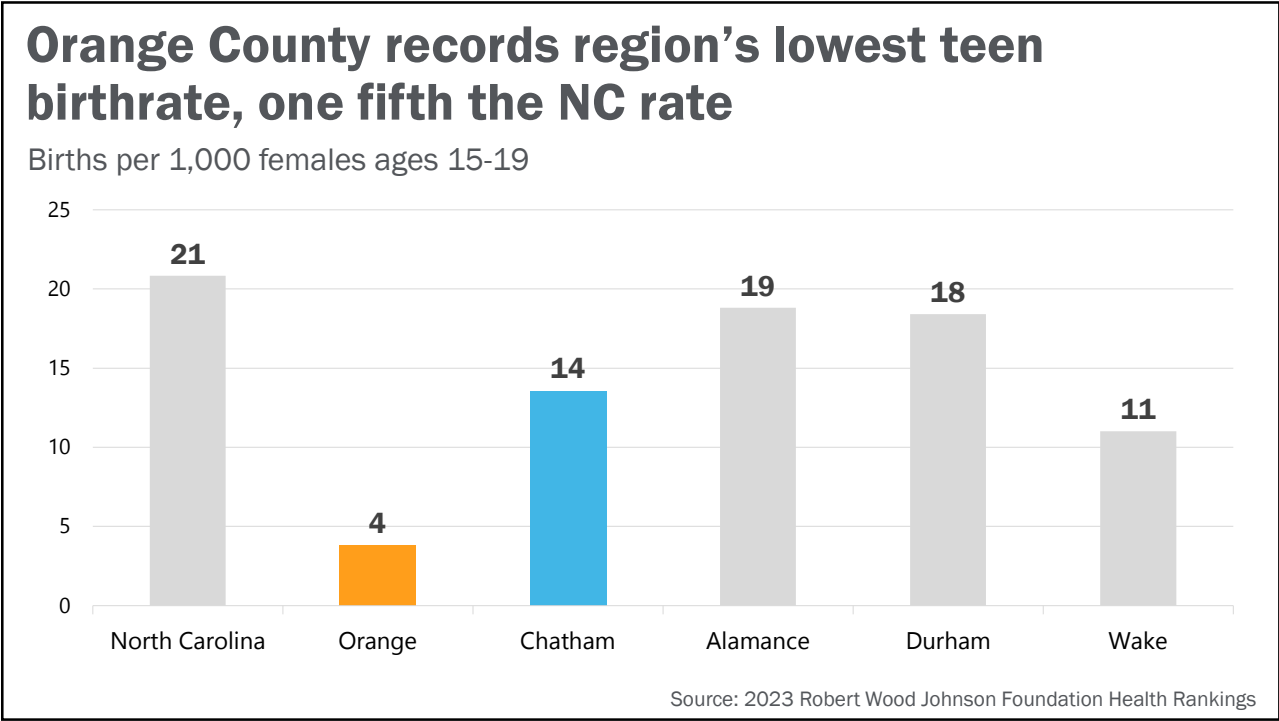


Source: 2023 Robert Wood Johnson Foundation Health Rankings

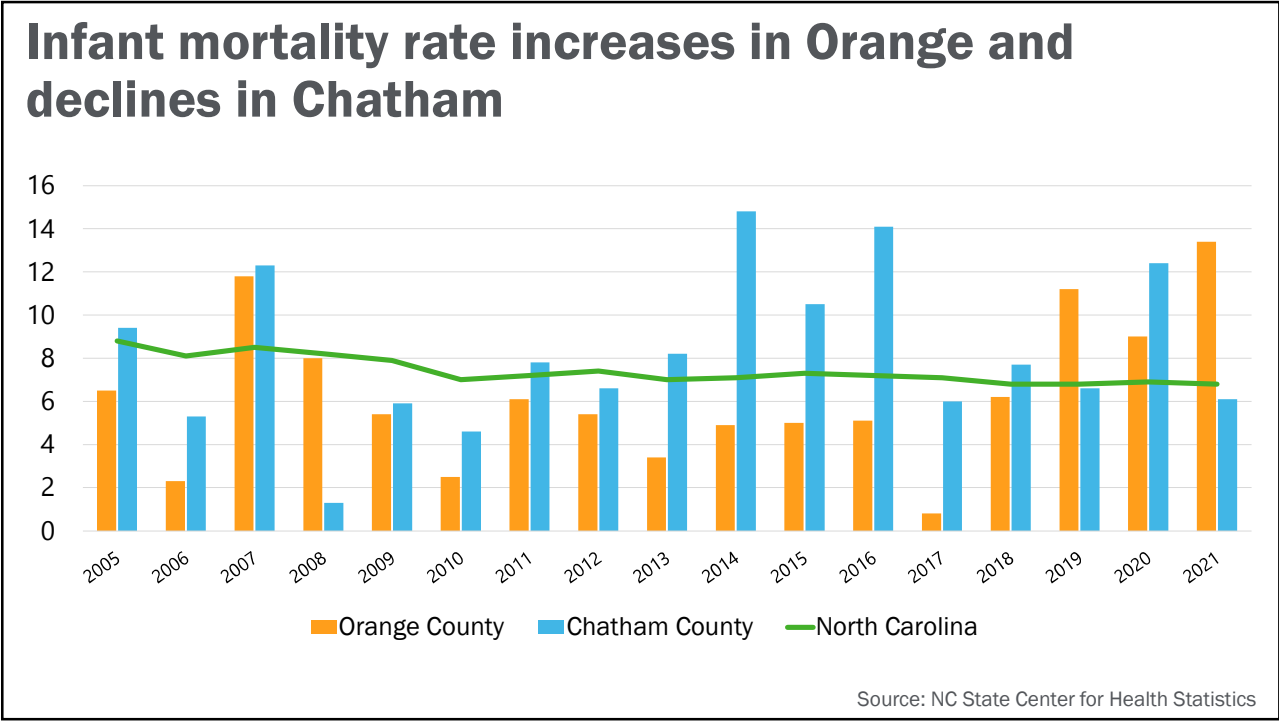
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President JB Buxton
Durham Tech

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JB Buxton
President



**DURHAM
TECH**

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**Orange County
Employers & Industries**

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Orange County's top 25 employers, 2022

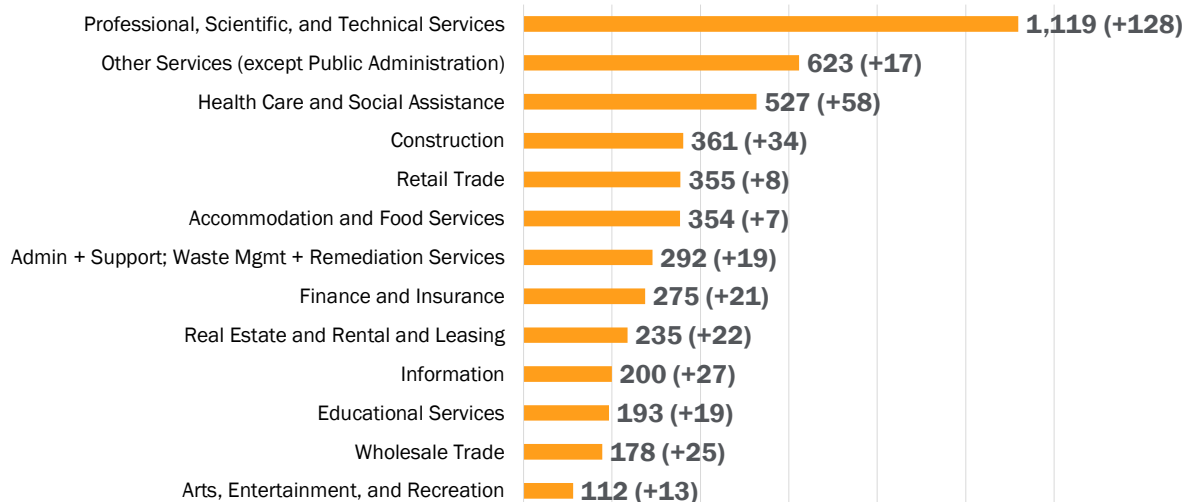
- | | |
|---|--------------------------------------|
| 1. UNC Chapel Hill | 14. Aramark |
| 2. UNC Health | 15. Wegmans |
| 3. Chapel Hill-Carrboro City Schools | 16. Carol Woods Retirement Community |
| 4. Orange County Schools | 17. Food Lion |
| 5. Orange County Government | 18. PHE, Inc. |
| 6. ABB/Industrial Connections & Solutions | 19. The Carolina Inn (Hyatt Hotels) |
| 7. Sports Endeavors | 20. Whole Foods |
| 8. Town Of Chapel Hill | 21. Weaver Street Market |
| 9. Wal-Mart Associates | 22. U.S. Postal Service |
| 10. Armacell | 23. UPS |
| 11. AKG Of America | 24. Morinaga America Foods |
| 12. Harris Teeter | 25. Residential Services, Inc. |
| 13. Summit Design & Engineering Service | |

Source: NC Department of Commerce + Orange County Economic Development

195

Top Orange County industries in 2022 by number of establishments (and growth in number of establishments)

Total establishments: 5,039; 424 new since 2021 (by NAICS code)

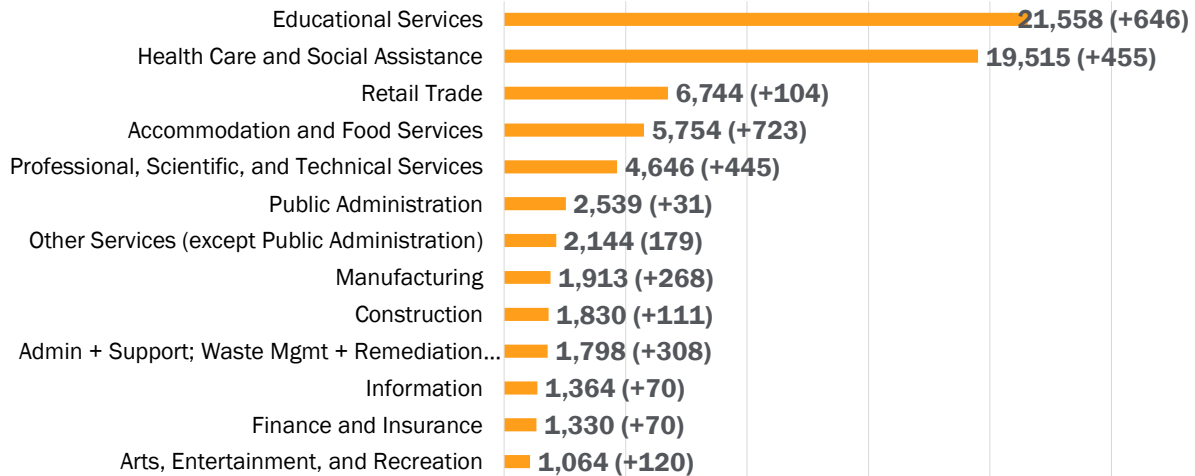


Source: Quarterly Census of Wages via NC Department of Commerce

196

Top Orange County industries in 2022 by average employment (and employment growth) since 2021

Total employment: 75,328; net new jobs since 2021: 3,501 (by NAICS code)

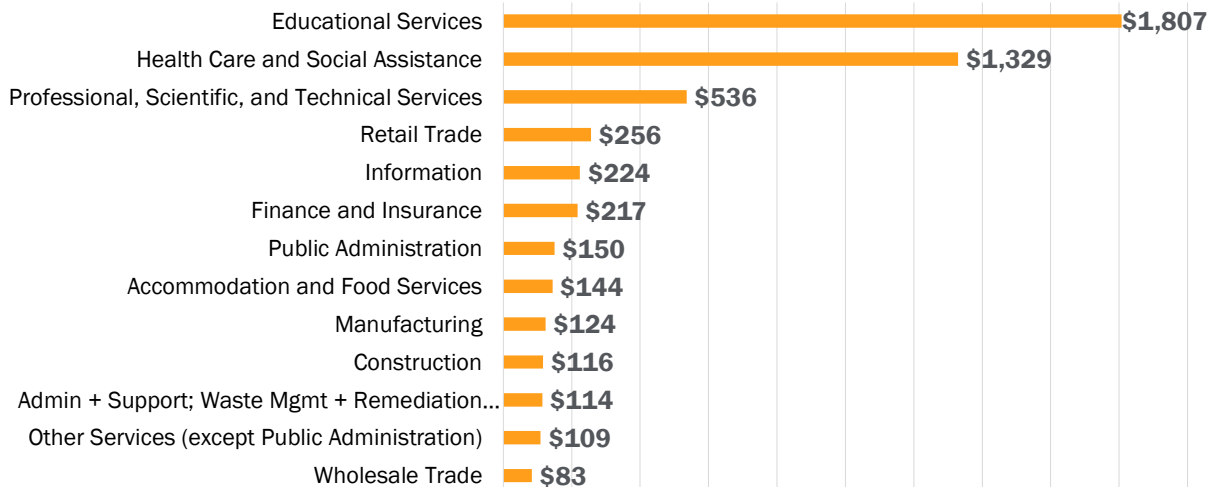


Source: Quarterly Census of Wages via NC Department of Commerce

197

Top Orange County industries in 2022 by total wages (in millions)

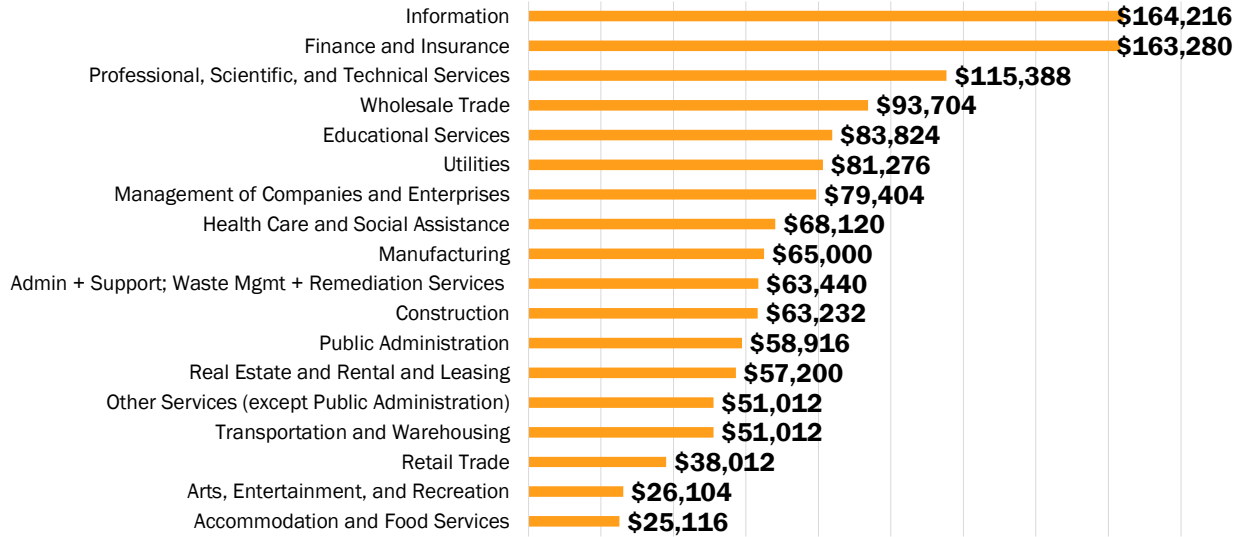
Total wages: \$5.37 billion (by NAICS code)



Source: Quarterly Census of Wages via NC Department of Commerce

198

Top Orange County industries by 2022 total average annual wages



Source: Quarterly Census of Wages via NC Department of Commerce

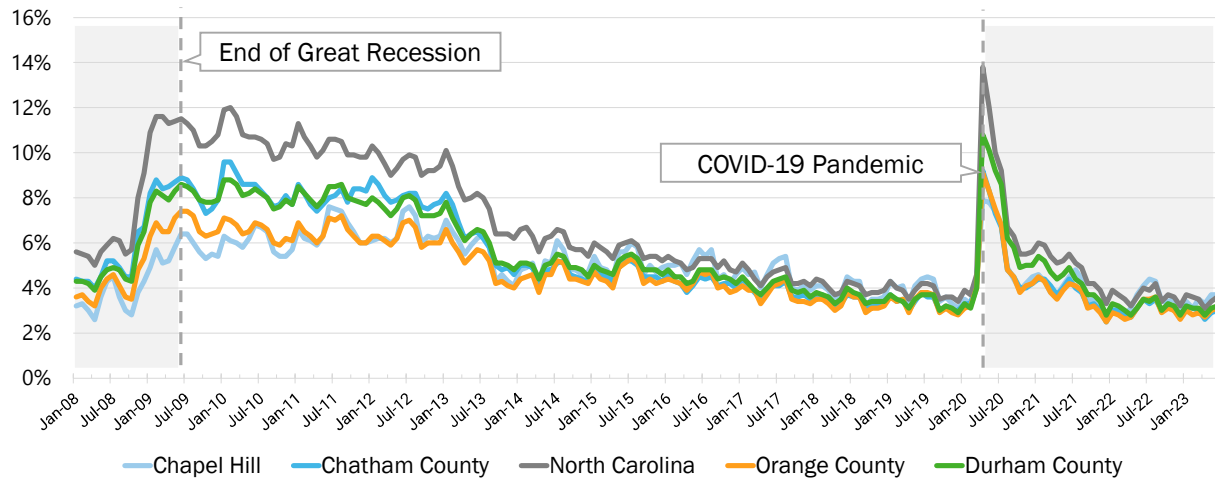
199

Unemployment & Labor Force

200

Pandemic leads to larger spike in unemployment, with faster recovery than Great Recession

Monthly unemployment rate (unadjusted), 1/2008 to 6/2023

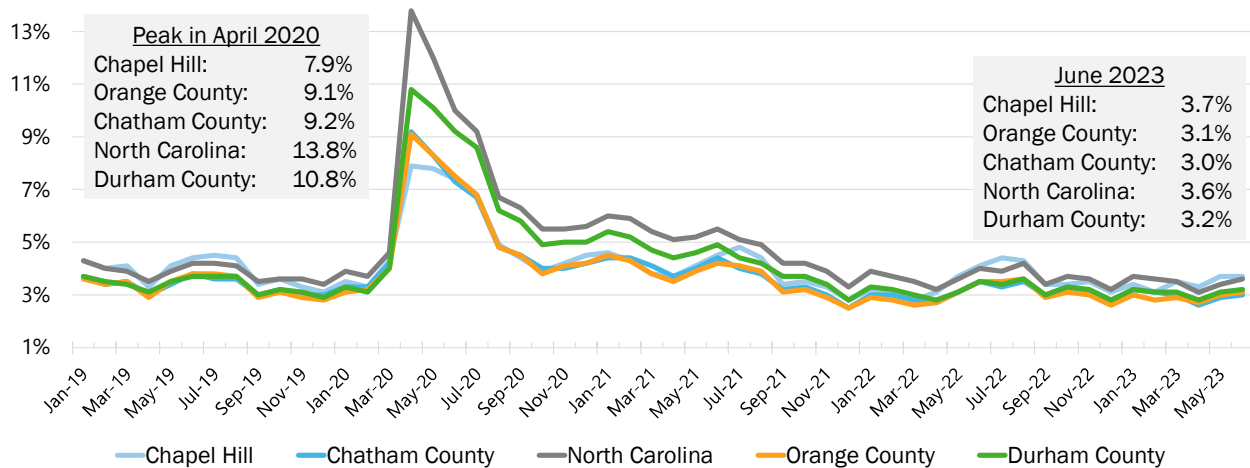


Source: Local Area Unemployment Statistics (LAUS) via NC Department of Commerce

201

Local unemployment ranges from 3% to 3.7% in June 2023

Monthly unemployment rate (unadjusted), 1/2019 to 6/2023

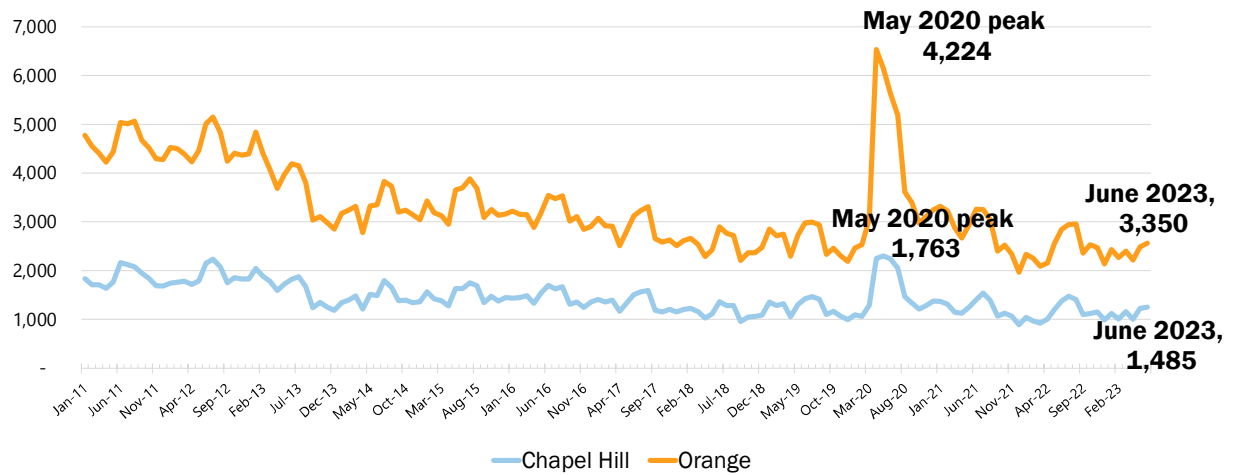


Source: Local Area Unemployment Statistics (LAUS) via NC Department of Commerce

202

Monthly unemployed individuals in Orange County and Chapel Hill

Monthly unemployed individuals, 01/2011 - 06/2023



Source: Local Area Unemployment Statistics (LAUS) via NC Department of Commerce

203

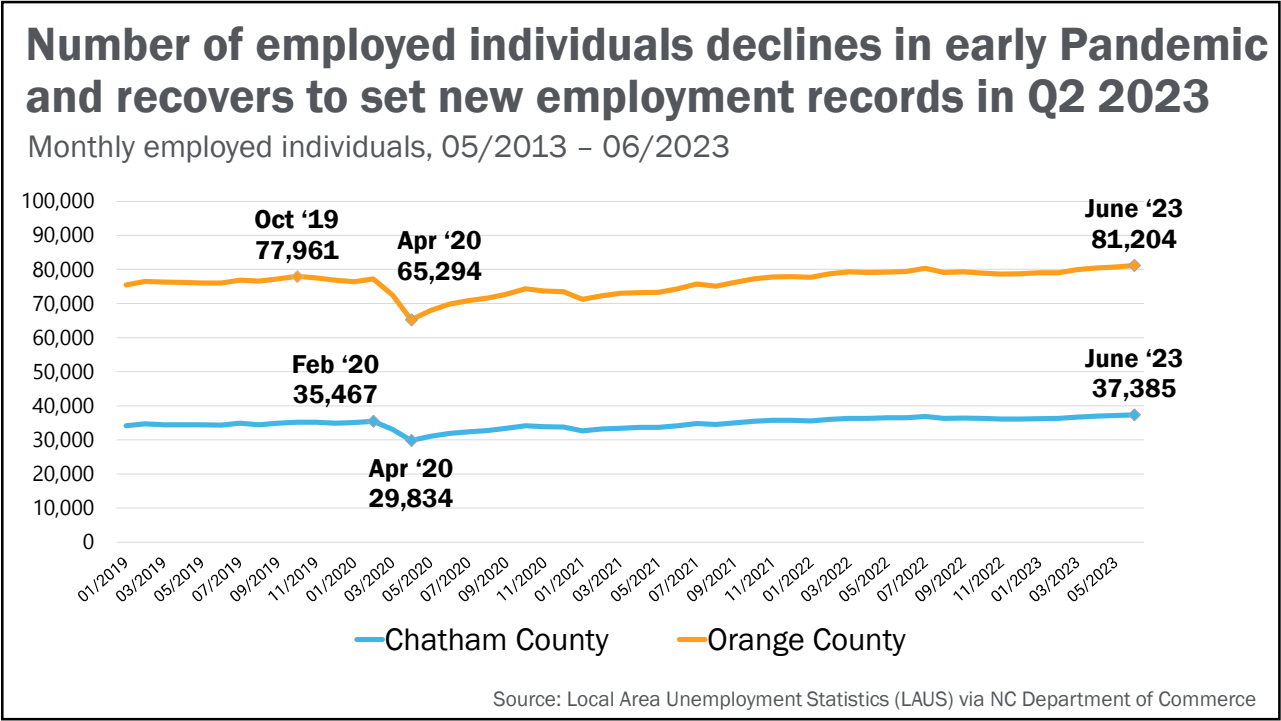
North Carolina workforce participation rate

Percentage of adults (ages 18-65) who are either working or actively seeking a job, 2000-2022

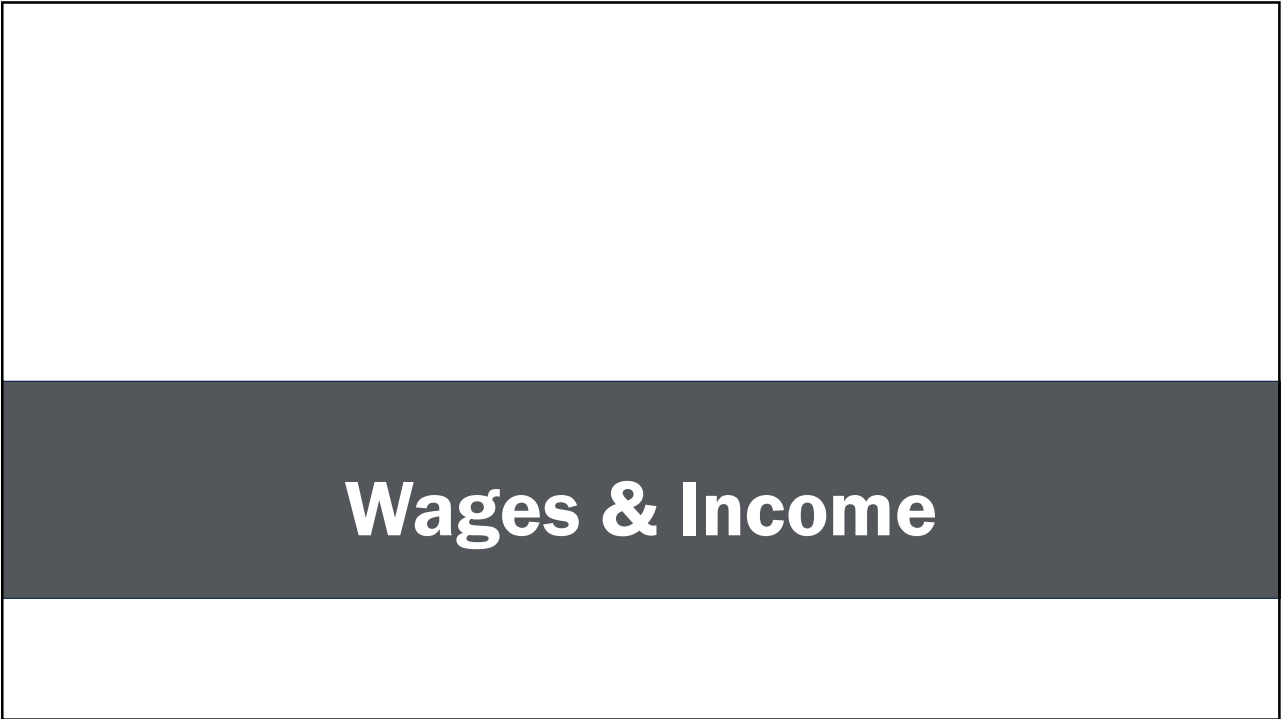


Source: Local Area Unemployment Statistics (LAUS) via NC Department of Commerce

204



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Average AGI: Orange ranks 1st; Chatham 2nd

Average adjusted gross income (AGI) on all tax returns, by county, 2020

	Average AGI on All Returns	Rank (of 100 Counties)
Orange County	\$120,351	1
Chatham County	\$102,298	2
Wake County	\$94,309	3
Durham County	\$72,640	9
Alamance County	\$55,026	38

Source: IRS

207

Orange County gives highest dollar amount to charities

Average itemized contribution to charitable causes on itemized tax returns, by county, 2020

	Average Itemized Contributions Reported	Rank (of 100 Counties)
Orange County	\$20,371	1
Chatham County	\$13,928	28
Durham County	\$13,666	33
Wake County	\$13,168	42
Alamance County	\$11,887	60

Source: IRS

208

Orange ranks near bottom in percentage of AGI given to charity

Average percent of adjusted gross income (AGI) contributed to charitable causes on itemized tax returns, by county, 2020

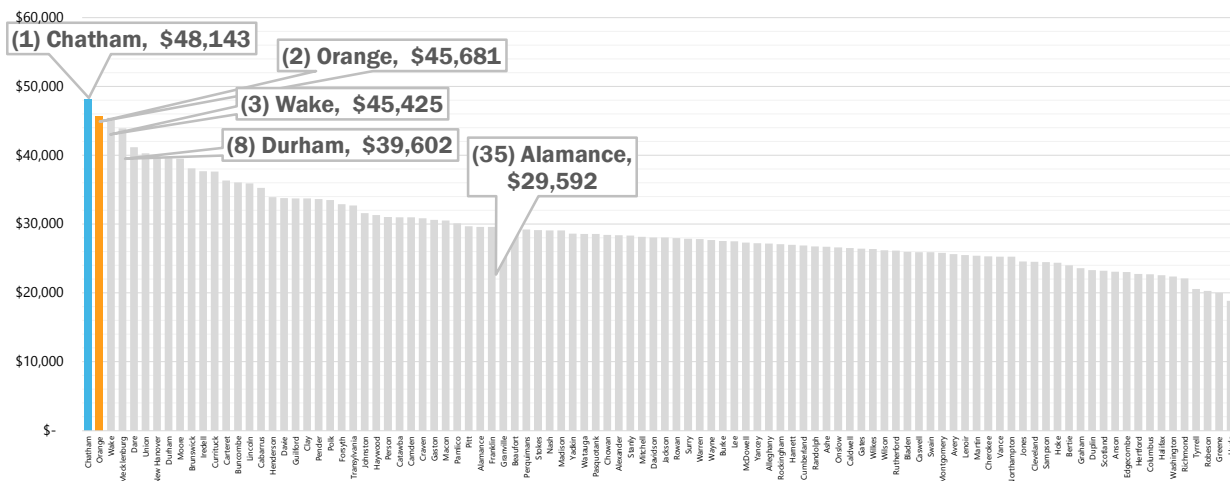
	Percent of AGI Contributed	Rank (of 100 Counties)
Durham County	7%	58
Alamance County	7%	64
Wake County	5%	89
Chatham County	5%	90
Orange County	5%	94

Source: IRS

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Per capita income | Orange = \$45,681 (2nd)

Per capita income is the total income earned in an area divided by the total number of the residents in that area

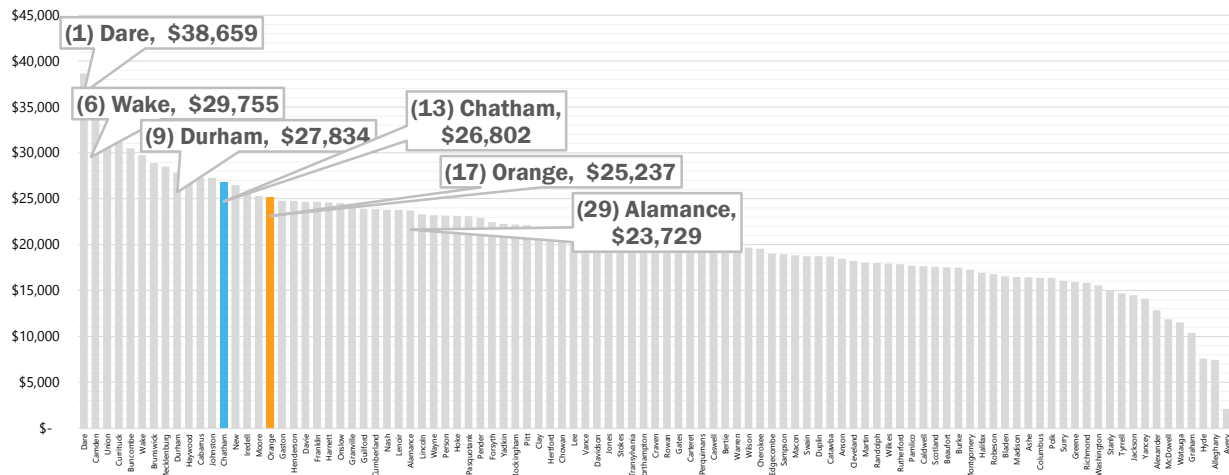


Source: American Community Survey (2017-2021 5-Year Estimates)

210

Black per capita income | Orange = \$25,237 (17th)

Black per capita income is the total income earned by Black residents in an area divided by the total number of Black residents in that area

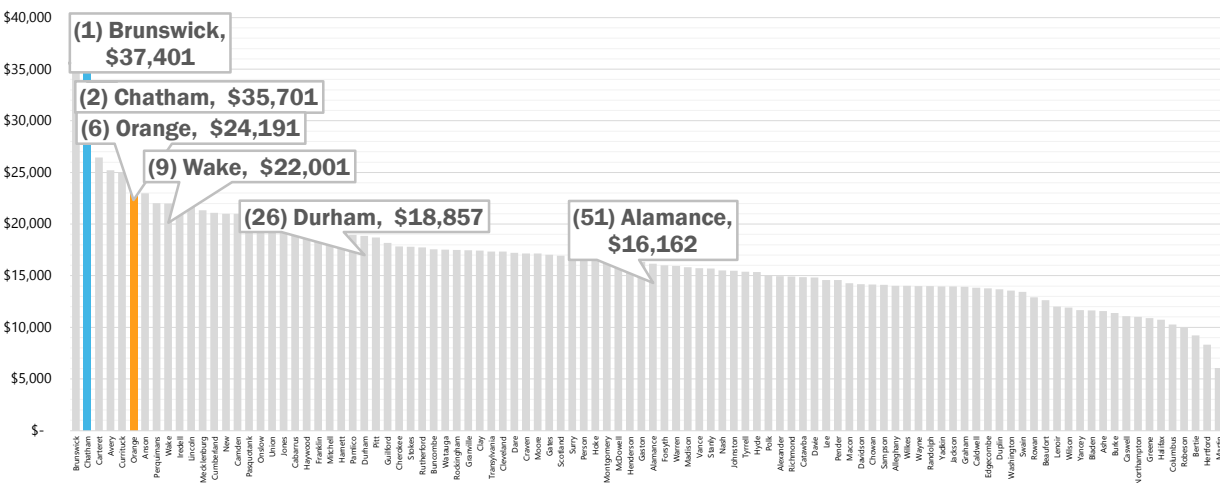


Source: American Community Survey (2017-2021 5-Year Estimates)

211

Hispanic per capita income | Orange = 24,191 (6th)

Hispanic per capita income is the total income earned by Hispanic residents in an area divided by the total number of Hispanic residents in that area

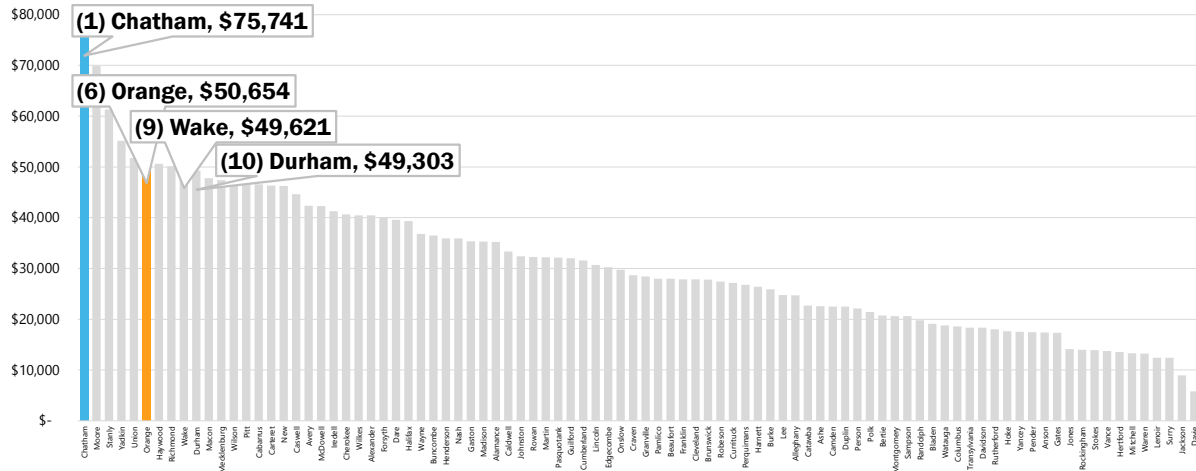


Source: American Community Survey (2017-2021 5-Year Estimates)

212

Asian per capita income | Orange = \$50,564 (6th)

Asian per capita income is the total income earned by Asian residents in an area divided by the total number of Asian residents in that area

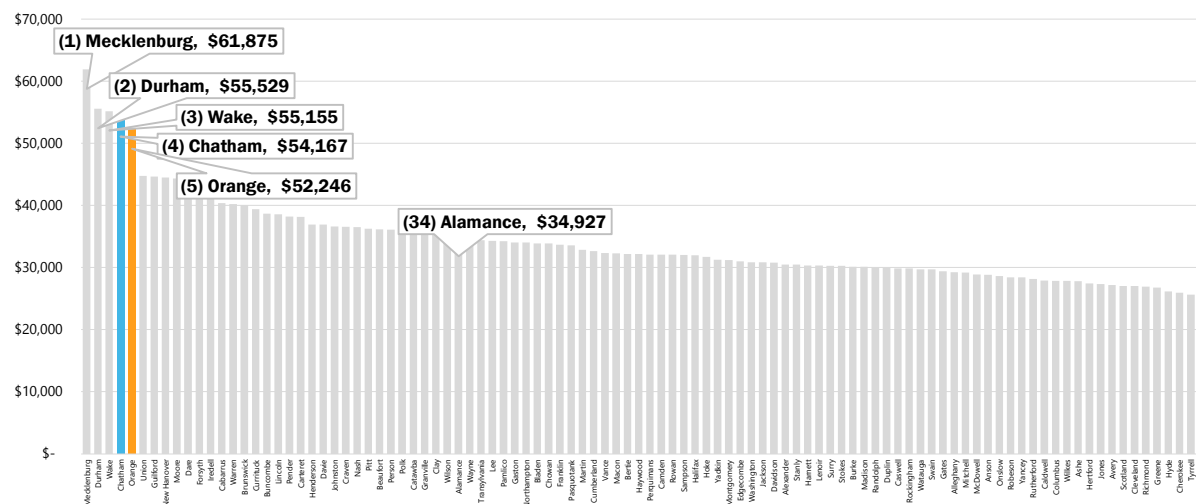


Source: American Community Survey (2017-2021 5-Year Estimates)

213

White (non-Hispanic) per capita income

White per capita income is the total income earned by White residents in an area divided by the total number of White residents in that area

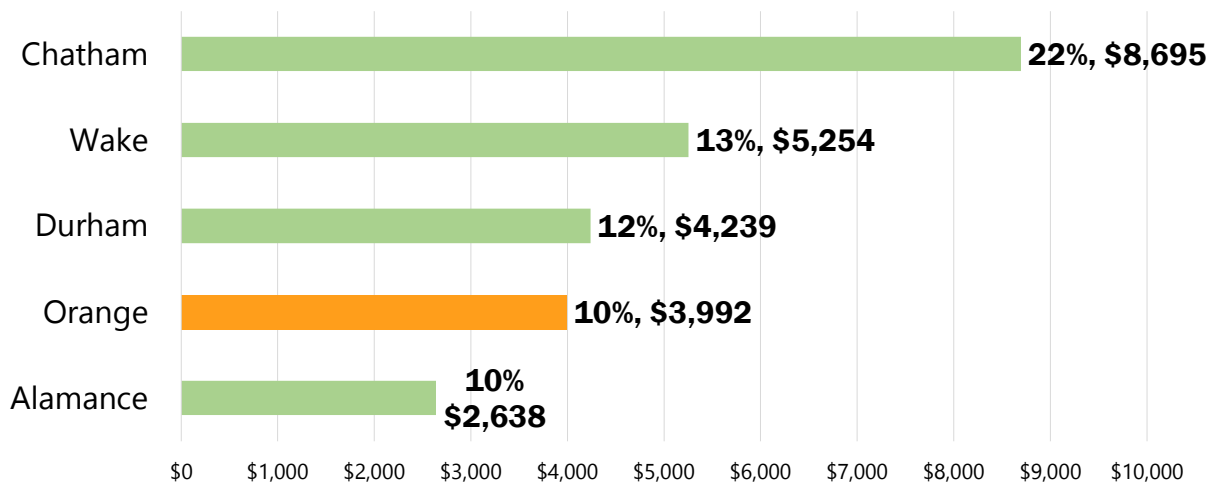


Source: American Community Survey (2017-2021 5-Year Estimates)

214

Growth in county per capita income, 2011-2021

Inflation adjusted \$2021

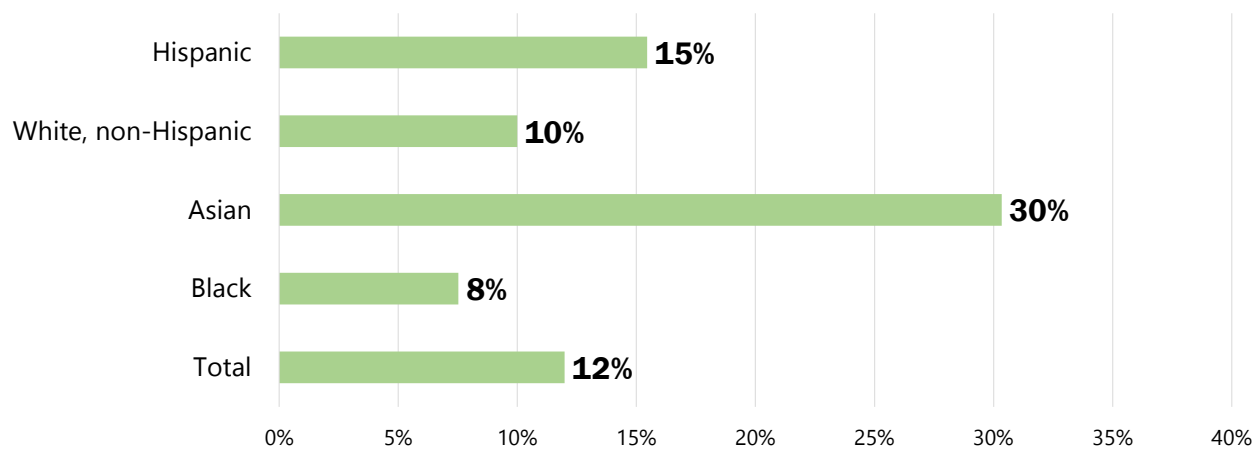


Source: American Community Survey (2017-2021 5-Year Estimates)

215

Durham County per capita income growth by race/ethnicity: 2016 to 2021

Inflation adjusted \$2021

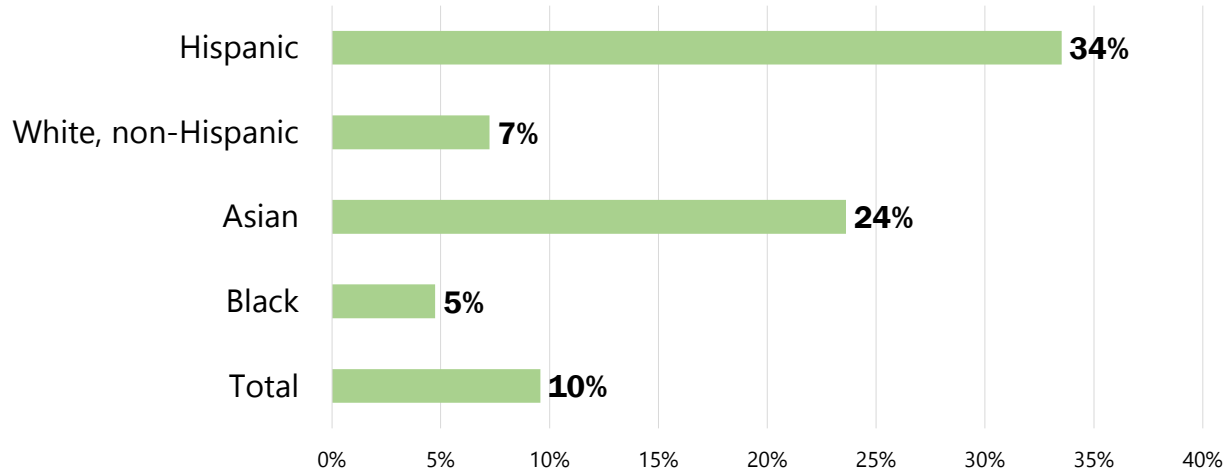


Source: American Community Survey (2017-2021 5-Year Estimates)

216

Orange County per capita income growth by race/ethnicity 2016 to 2021

Inflation adjusted \$2021

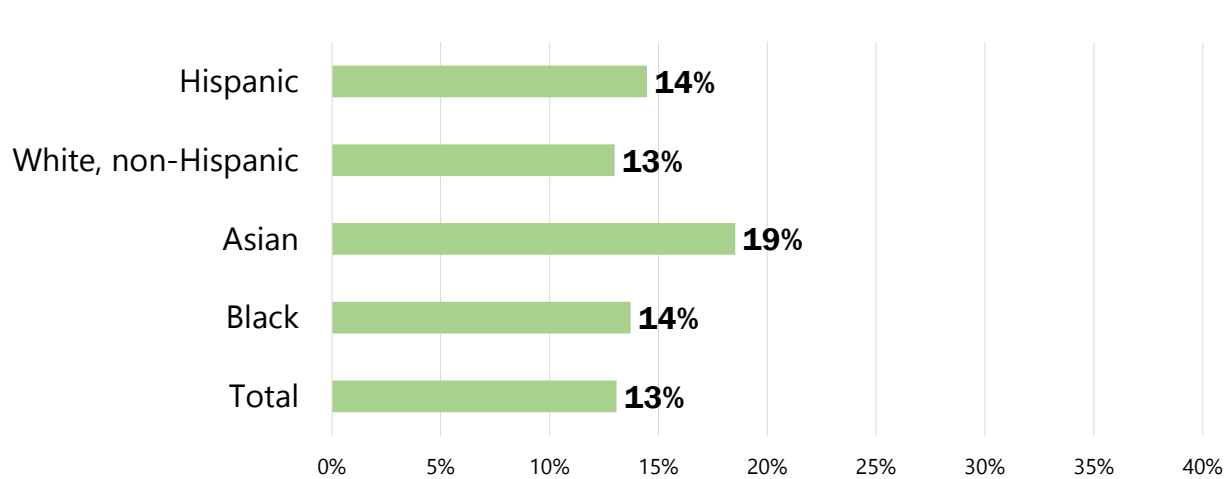


Source: American Community Survey (2017-2021 5-Year Estimates)

217

Wake County per capita income growth by race/ethnicity 2016-2021

Inflation adjusted \$2021

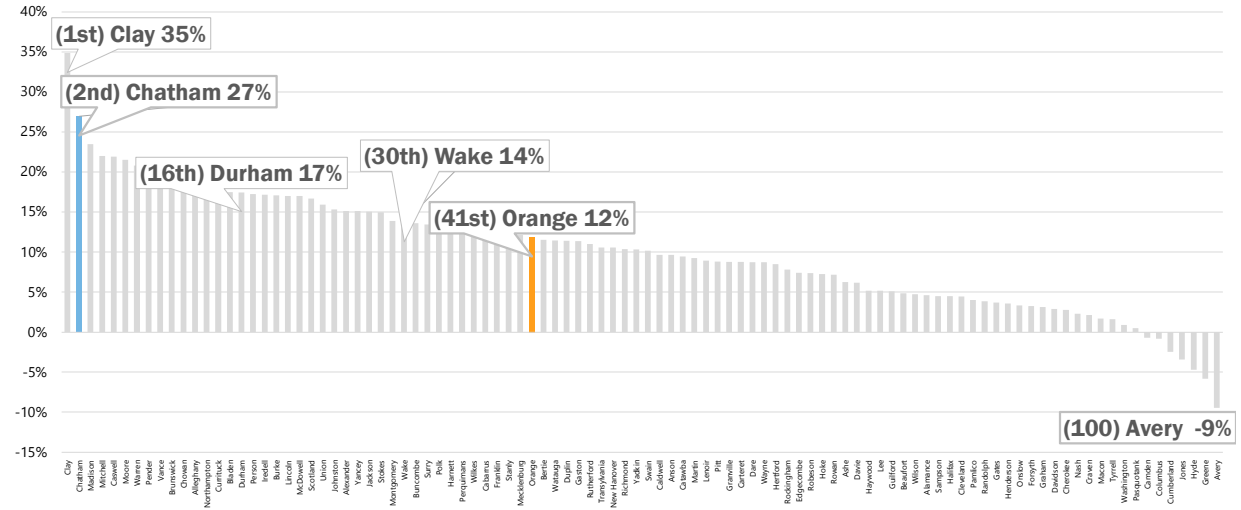


Source: American Community Survey (2017-2021 5-Year Estimates)

218

Change in total income per capita, 2011 - 2021

Total per capita income growth/loss among NC's 100 counties (inflation adjusted \$2021)

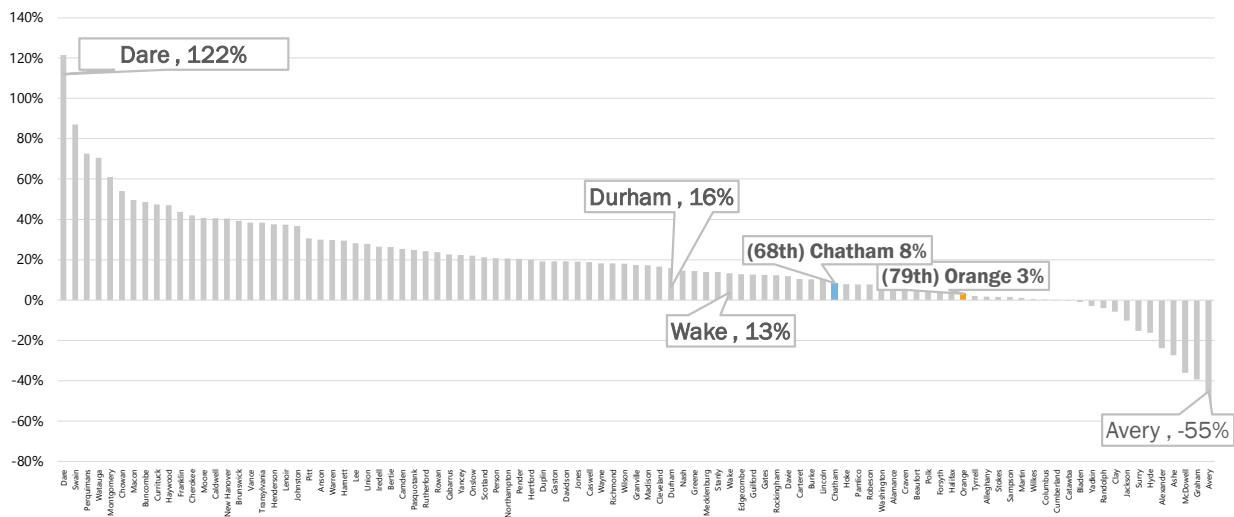


Source: American Community Survey (2017-2021 5-Year Estimates)

219

Change in Black per capita income, 2011-2021

Total per capita income growth/loss among NC's 100 counties (inflation adjusted \$2021)



Source: American Community Survey (2017-2021 5-Year Estimates)

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Sponsor Break

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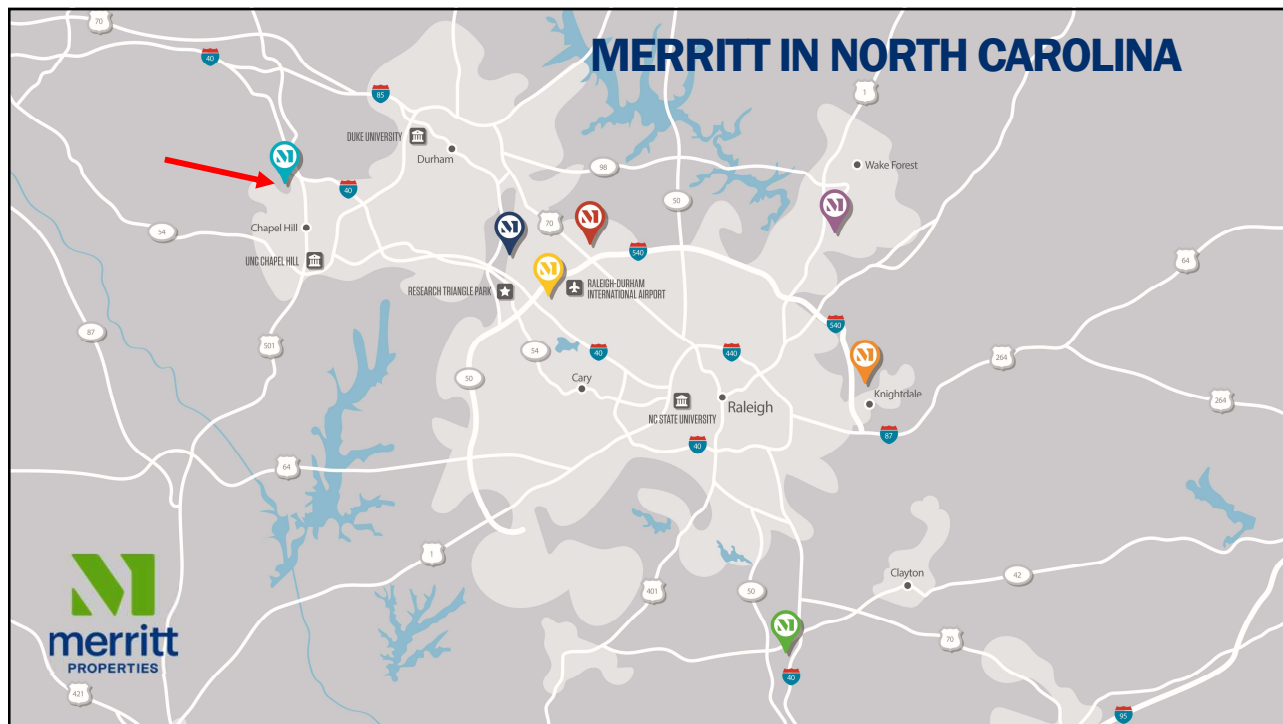


Keith Wallace
Regional Director, North Carolina



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North Chapel Business Center

- 7300 and 7310 Millhouse Road in Chapel Hill
- Just west of I-40 and NC-86
- Two flex light/industrial buildings
 - Building 1: 61,710 SF
 - Building 2: 54,600 SF
- 18' clear heights
- Rear-loaded docks and drive-in capabilities
- Leasable bays 3,600 SF +/-



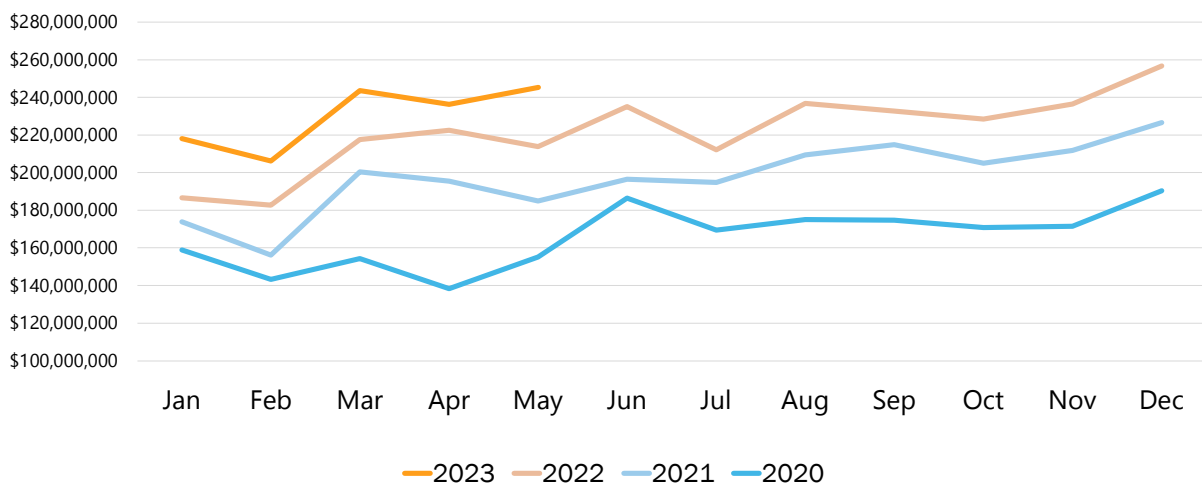
224

Sales, Tax & Revenue

225

Orange County retail sales rise year over year

Taxable retail sales by month, 2020 through May 2023

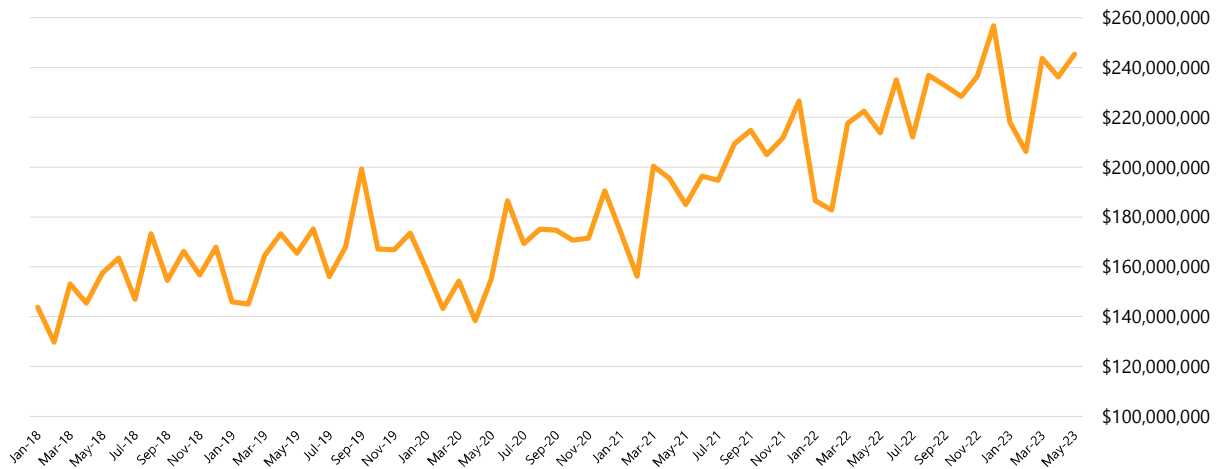


Source: NC Department of Revenue

226

Orange County monthly retail sales

Taxable retail sales by month, 2018 through May 2023

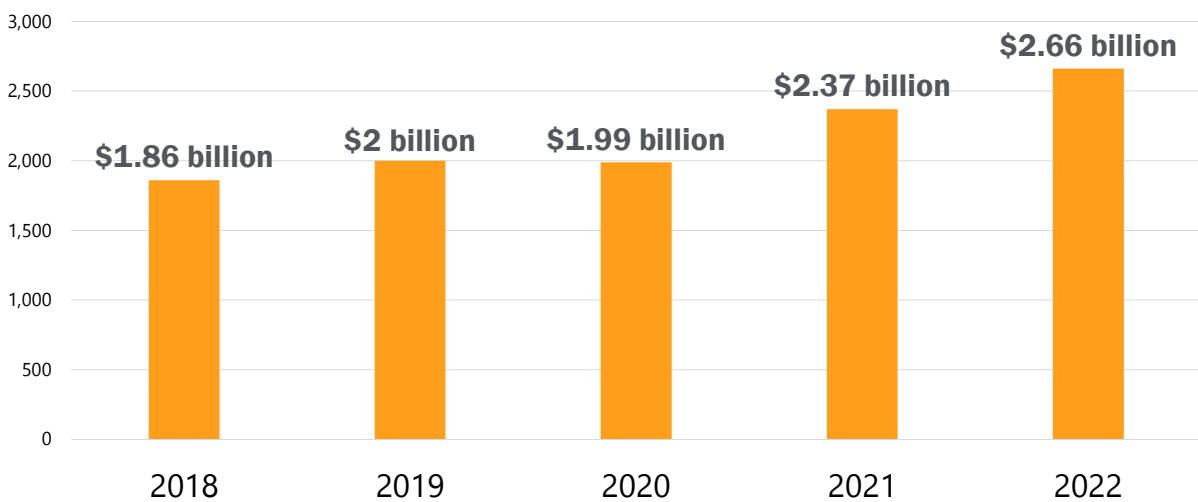


Source: NC Department of Revenue

227

Orange County annual retail sales

Annual retail sales in Orange County, calendar years 2018-2022

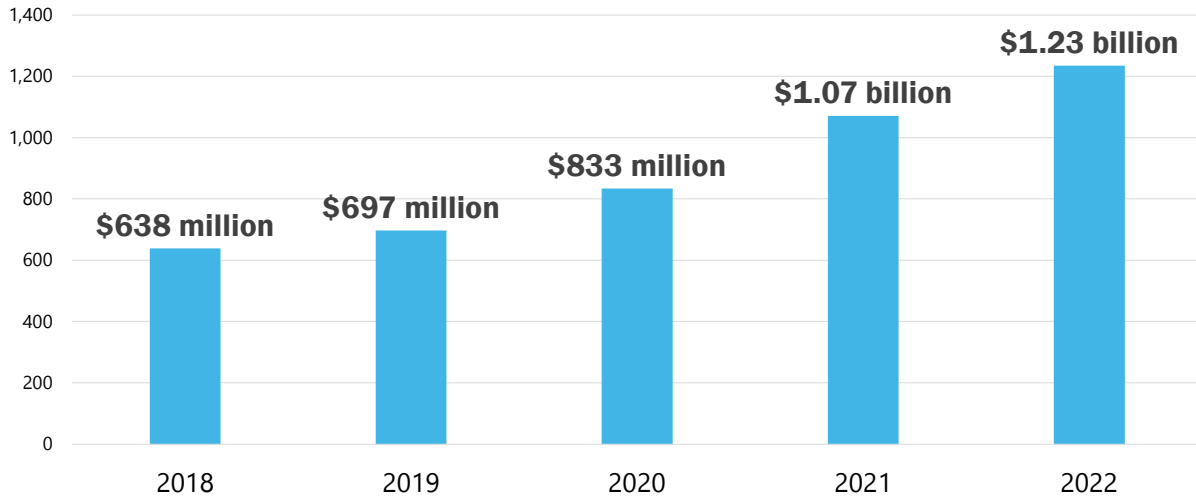


Source: NC Department of Revenue

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Chatham County annual retail sales

Annual retail sales in Chatham County, calendar years 2018-2022

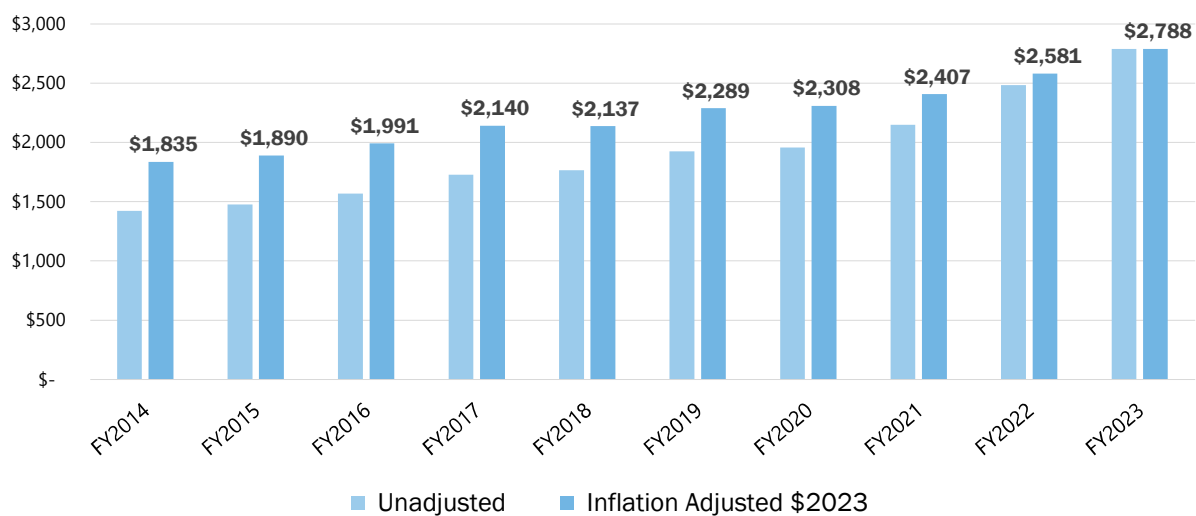


Source: NC Department of Revenue

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Orange County taxable sales (in millions)

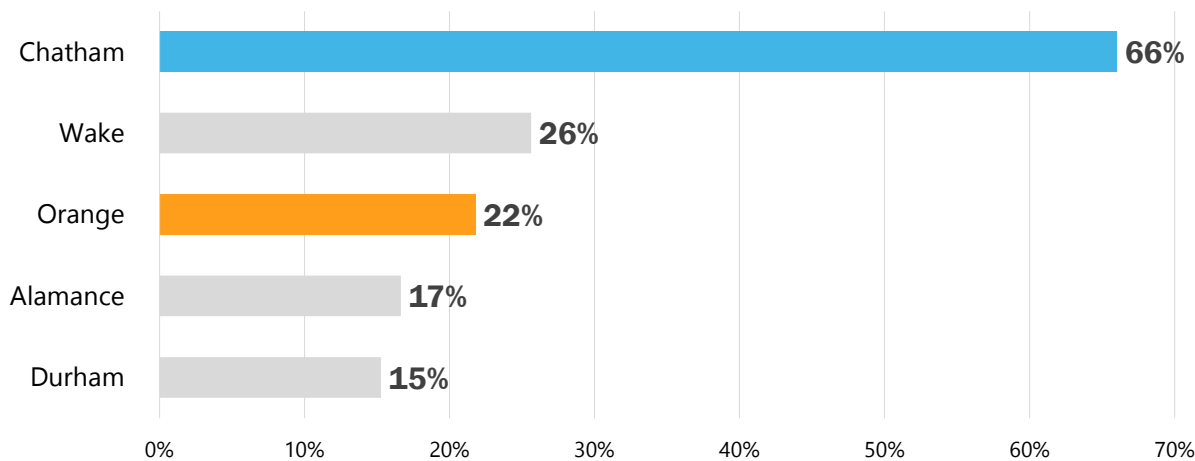
Unadjusted and Inflation adjusted (\$2023) Orange County taxable sales for fiscal years 2014-2023



Source: NC Department of Revenue

230

Taxable sales growth from FY2019 to FY2023 (inflation adjusted \$2023)

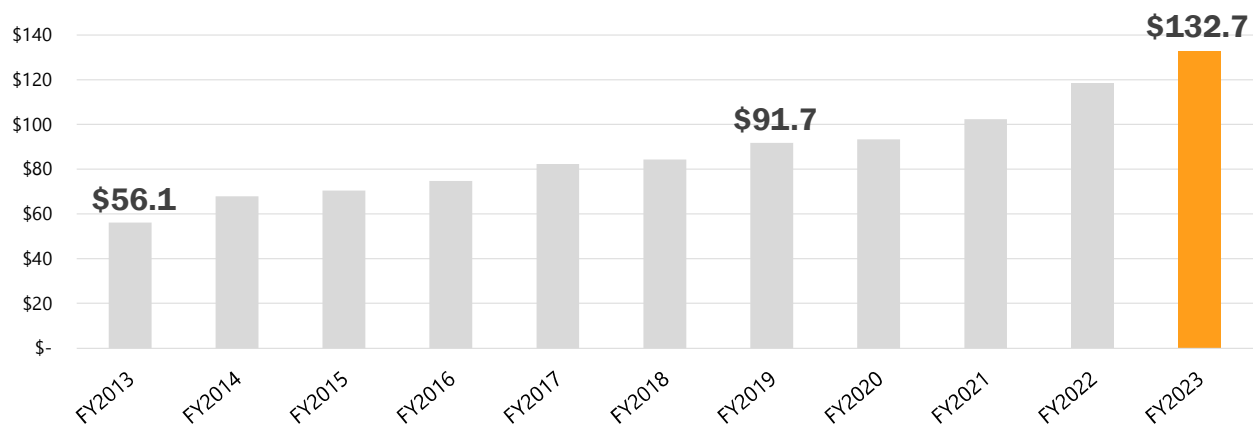


Source: NC Department of Revenue

231

Orange County sales tax collections approaching \$133 million in 2023

Orange county sales tax collections (in millions), FY2013-FY2023

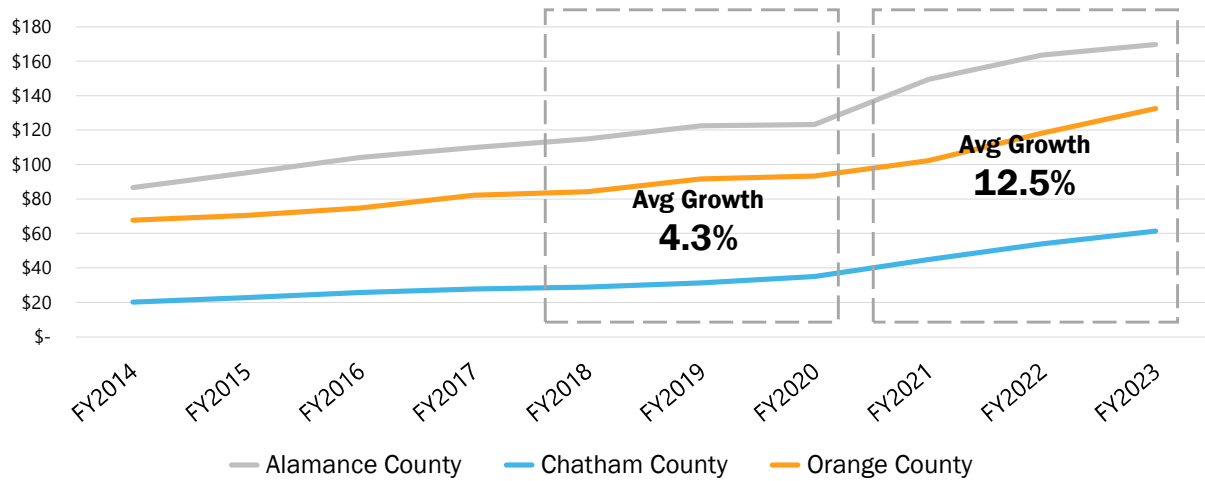


Source: NC Department of Revenue

232

Sales tax collections rising faster post-pandemic

Sales tax collections (in millions), FY2014 – FY2023

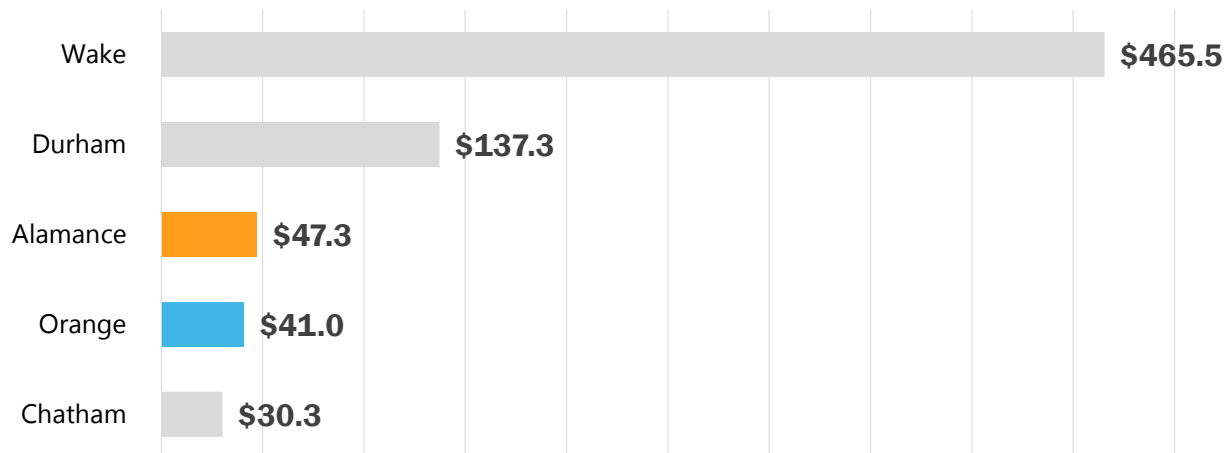


Source: NC Department of Revenue

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Orange County collects an additional \$41 million in sales tax between FY2019 and FY2023

Increase in gross sales tax collections, in millions, FY2019 to FY2023

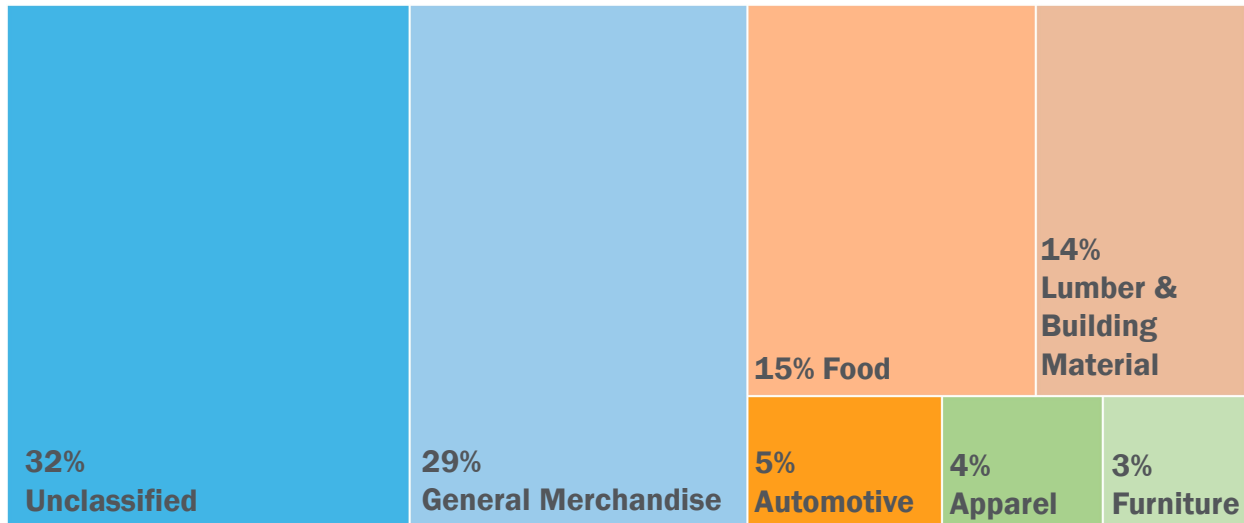


Source: NC Department of Revenue

234

Orange County taxable sales & purchases makeup

Percentage of total taxable sales by type, FY2023

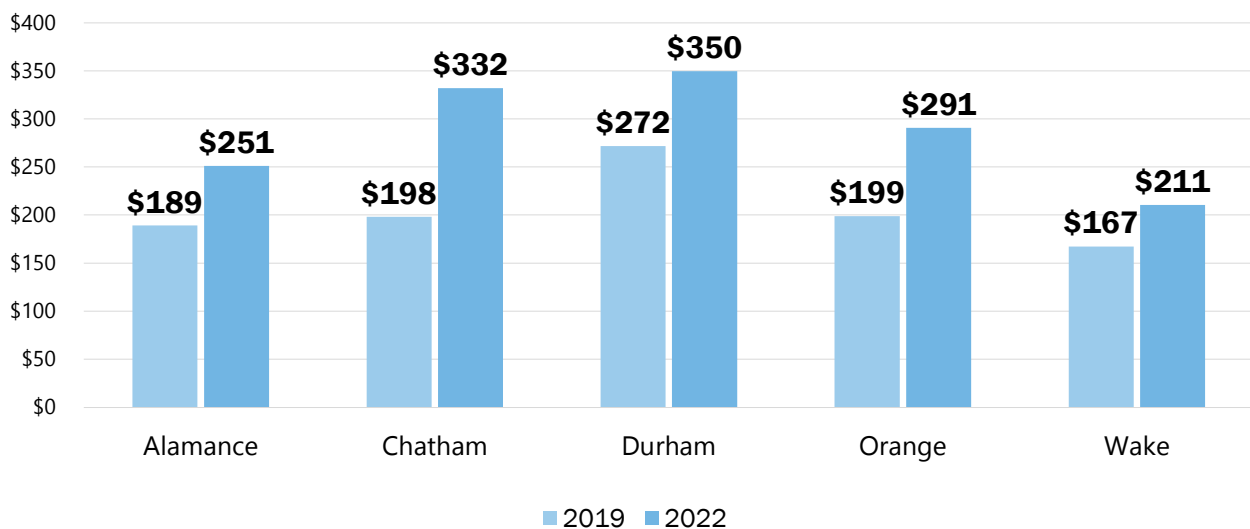


Source: NC Department of Revenue

235

Sales tax per capita, FY2019 vs. FY2022

Total sales tax collected in the county divided by the number of residents of the county



Source: NC Department of State Treasurer

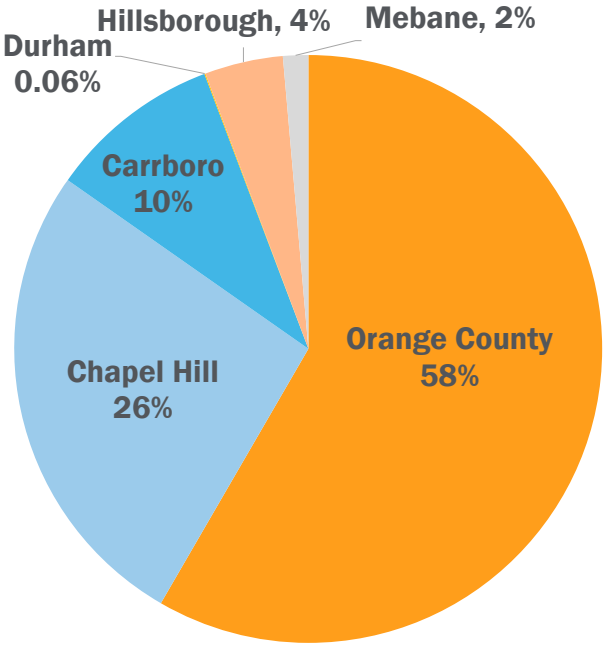
236

Sales Tax Disbursements

237

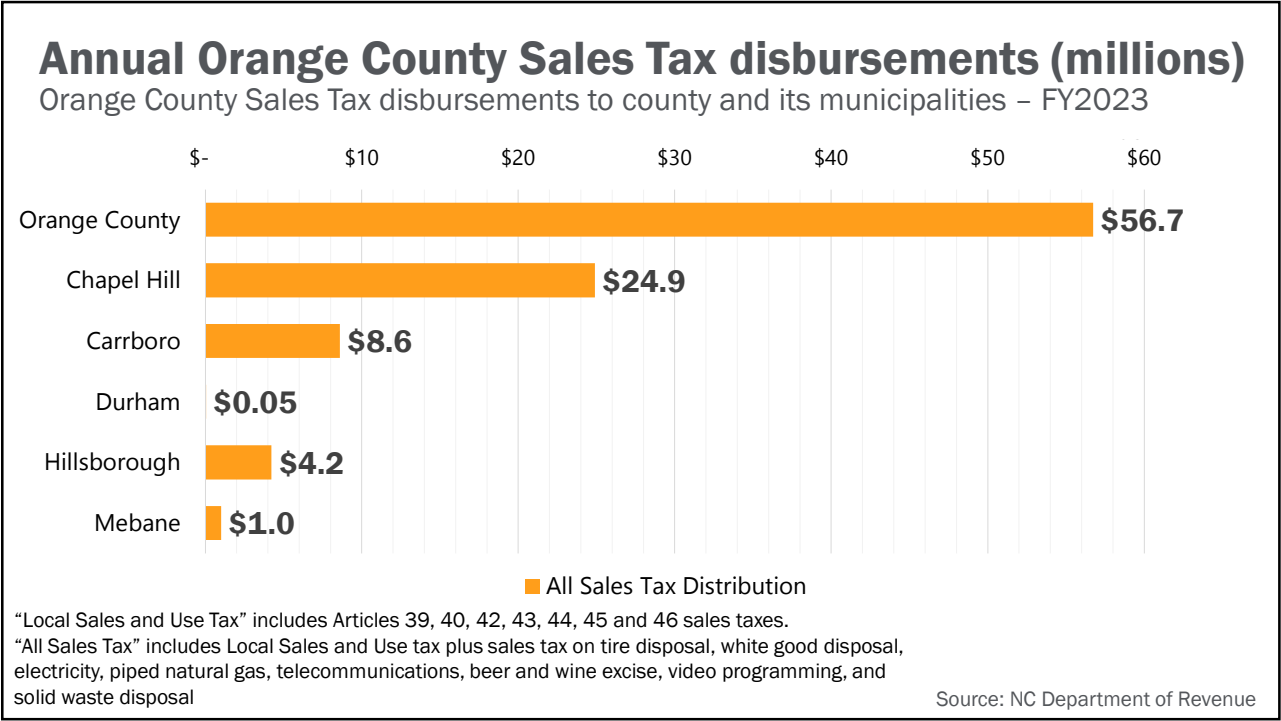
Orange County Sales and Use Tax disbursements

How Orange County’s Sales and Use Tax is distributed to the county & among its municipalities, FY2023



Source: NC Department of Revenue

238



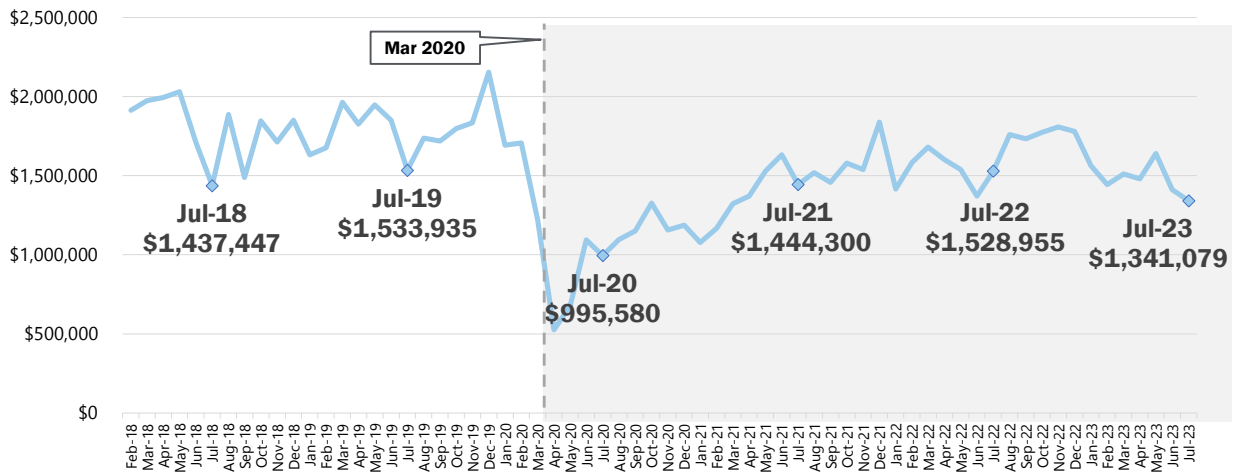
239

Chamber Small Business Index

240

Chamber Small Business Index: monthly credit card transactions

Cohort of 45 diverse local businesses' combined monthly credit card transaction values, 02/2018 – 07/2023

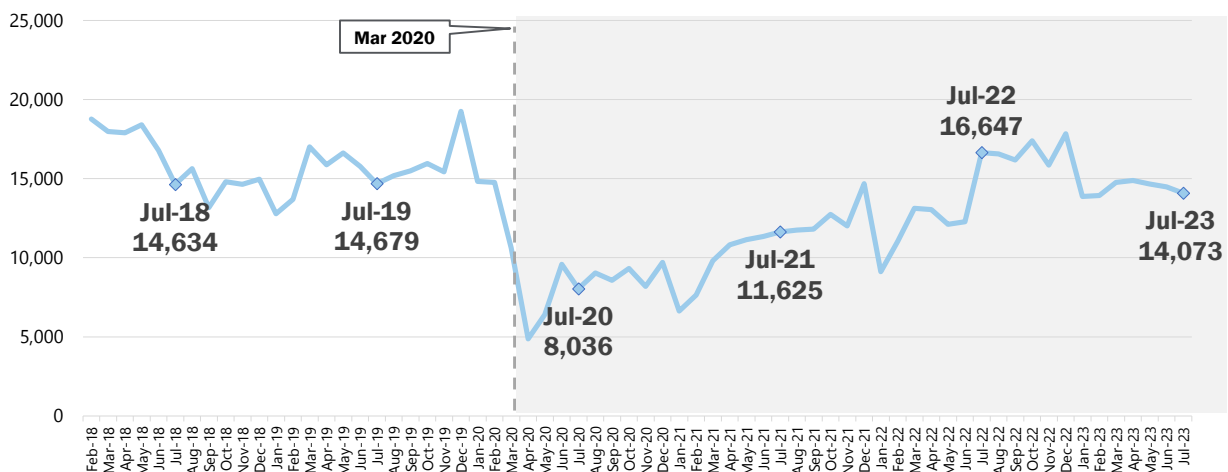


Source: The Chamber's 40-Business Index

241

Chamber Small Business Index: monthly credit card transactions

Cohort of 45 diverse local businesses' monthly credit card transactions, 02/2018 – 07/2023



Source: The Chamber's 40-Business Index

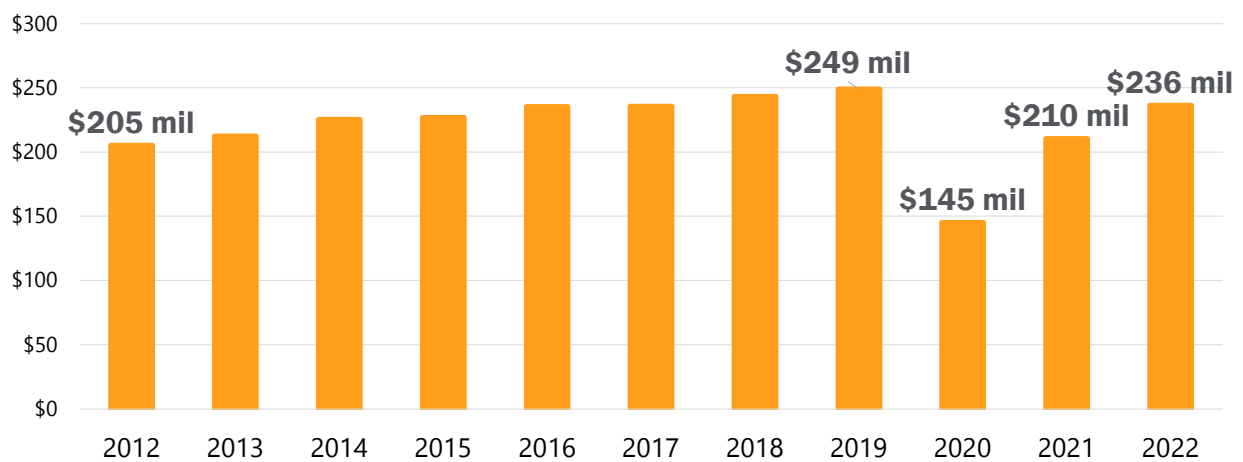
242

Tourism & Hospitality

243

Orange County domestic visitor expenditures rise, down \$12.7 million from 2019 peak

Domestic visitor expenditures (in millions), FY2012 – FY2022, (inflation adjusted \$2022)

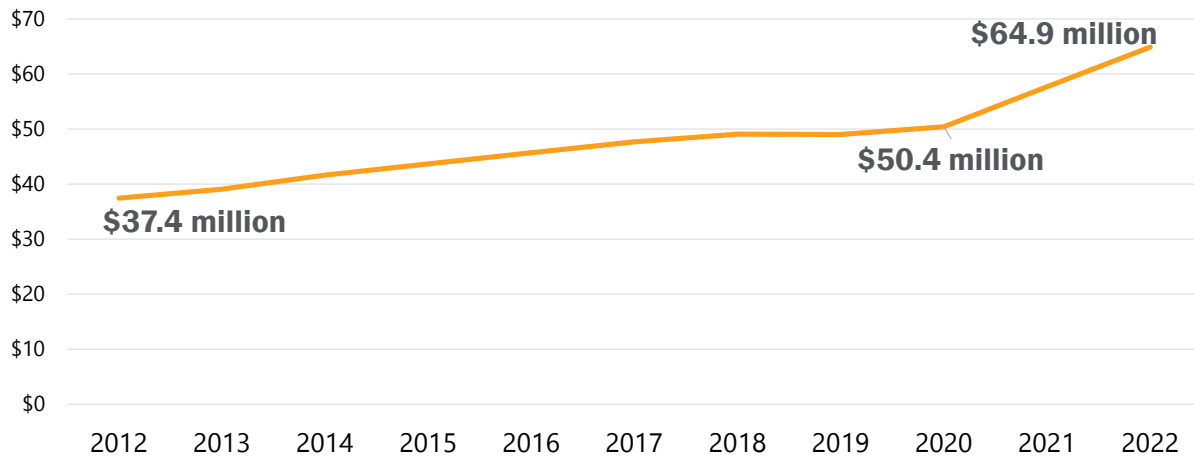


Source: Visit North Carolina

244

Orange County tourism labor payroll continues to grow

Tourism labor payroll is income supported by tourism spending (in millions), FY2012 – FY2022, Inflation adjusted \$2022

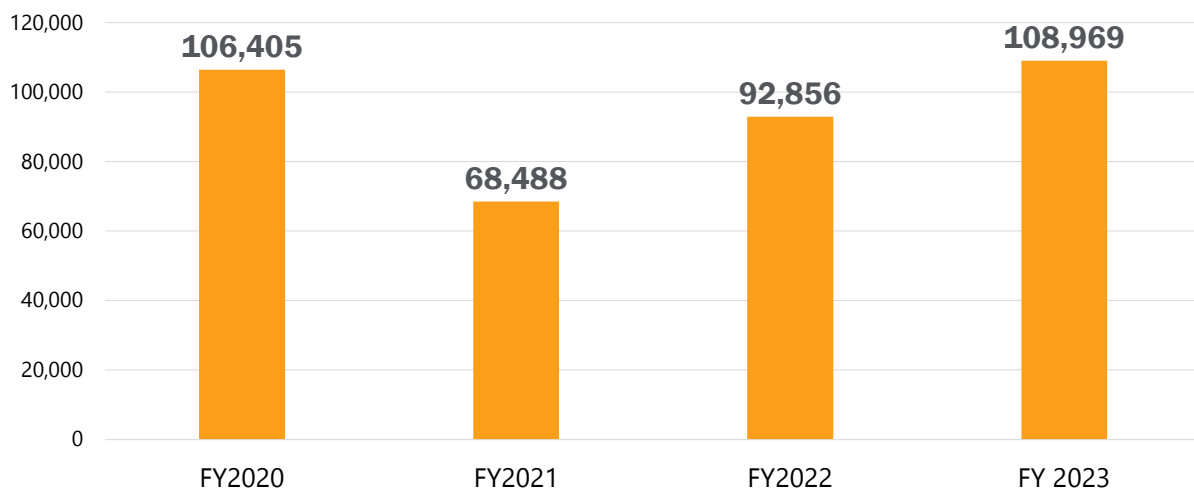


Source: Visit North Carolina

245

Annual Orange County STRs room supply

Number of Short-Term Rental (STR) room nights available per year (i.e., AirBnB, VRBO)

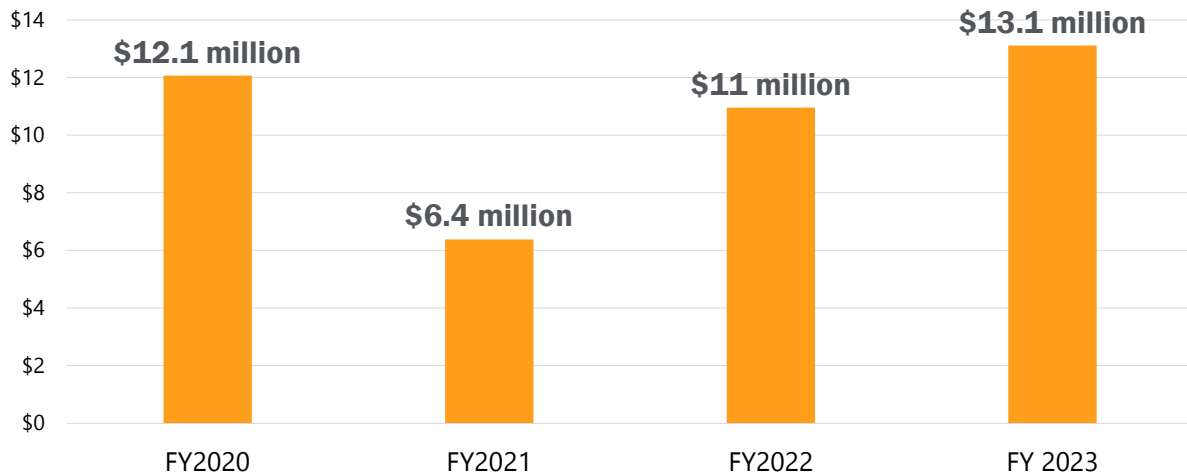


Source: Orange County Visitors Bureau

246

Orange County STR annual revenue hits new high of \$13 million in 2023

Annual rental revenue from Short-Term Rental (STR) properties (i.e., AirBnB, VRBO)



Source: Orange County Visitors Bureau

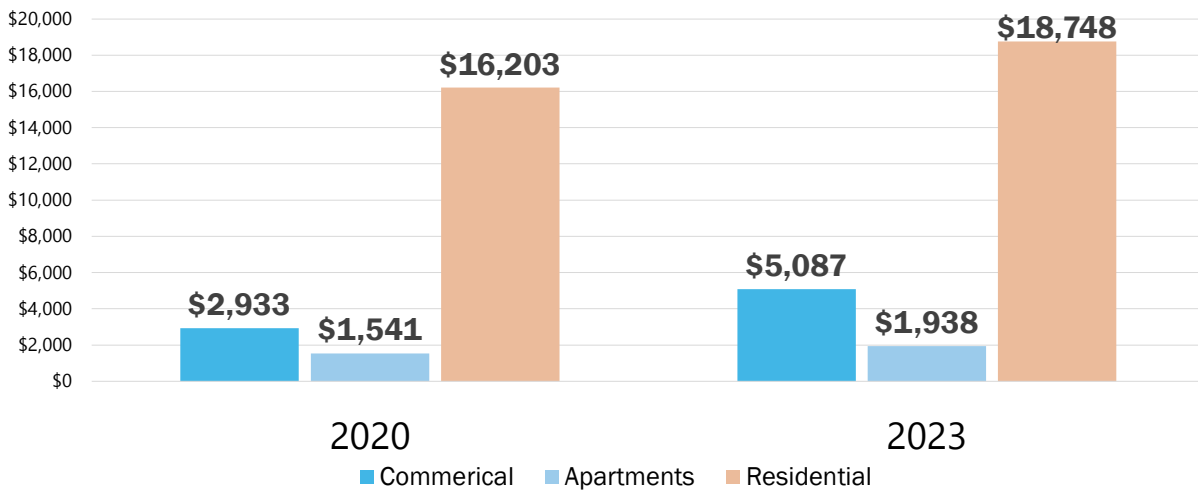
247

A growing commercial tax base

248

Orange County total assessed value grows by \$5.1 billion to \$25.8 billion, led by commercial sector growth

Assessed property value by sector (in millions), 2020 and 2023

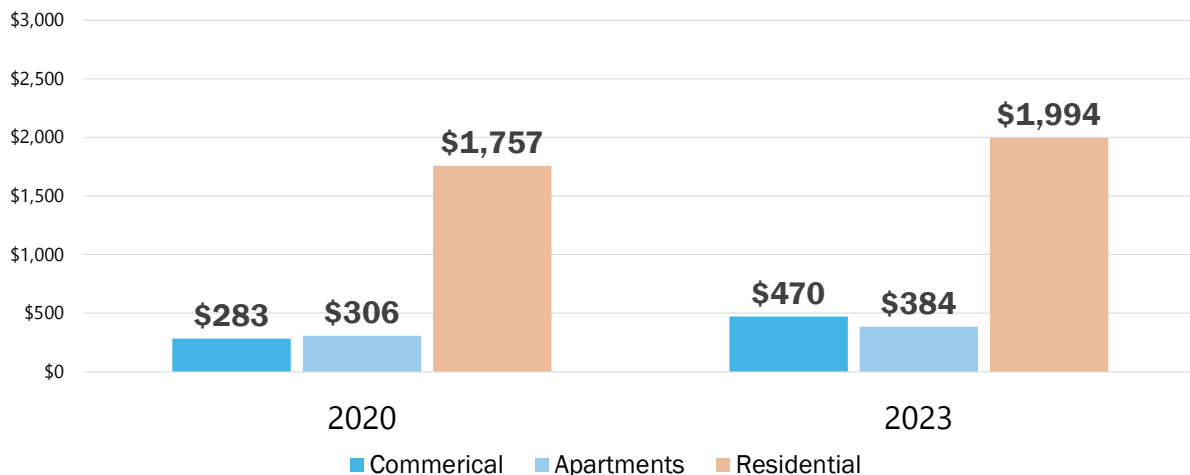


Source: Orange County Tax Assessor

249

Carrboro total assessed value grows by \$501 million to \$2.8 billion, commercial by \$187 million (66%)

Assessed property value by sector (in millions), 2020 and 2023

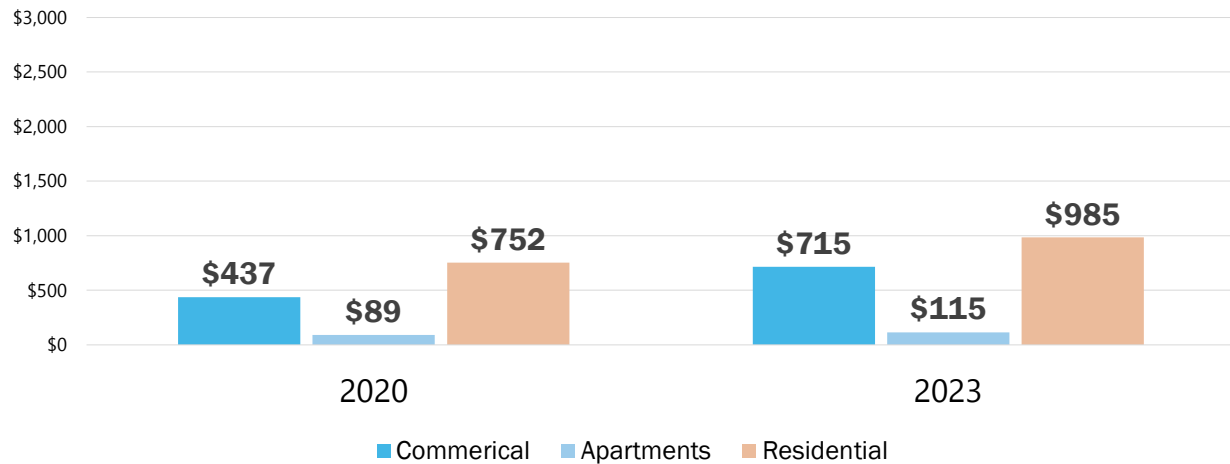


Source: Orange County Tax Assessor

250

Hillsborough total assessed value grows by \$537 million to \$1.8 billion, commercial by \$279 million (64%)

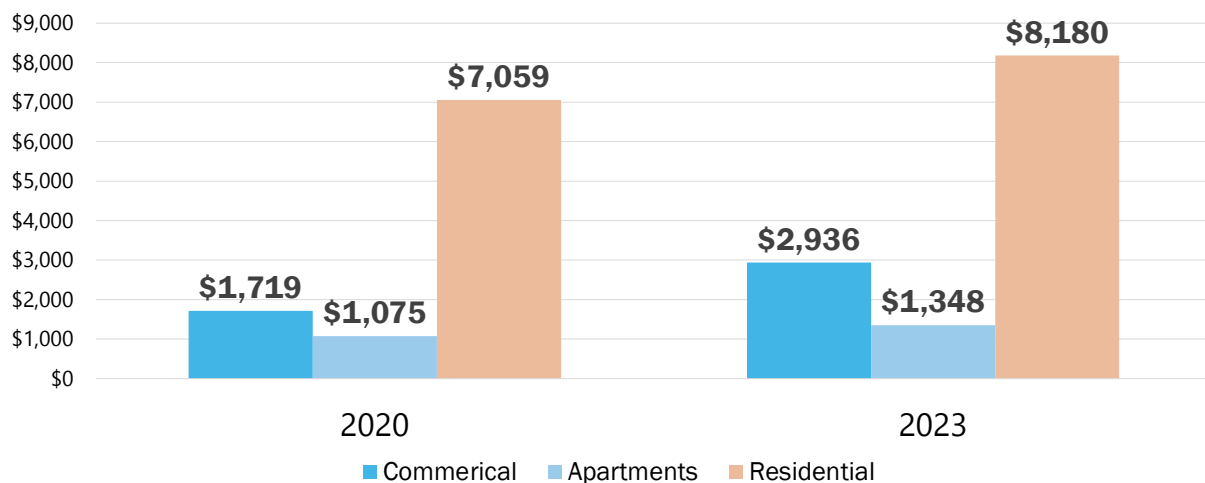
Assessed property value by sector (in millions), 2020 and 2023



Source: Orange County Tax Assessor

251

Chapel Hill total assessed value grows by \$2.6 billion to \$12.5 billion, commercial by \$1.2 billion (71%)

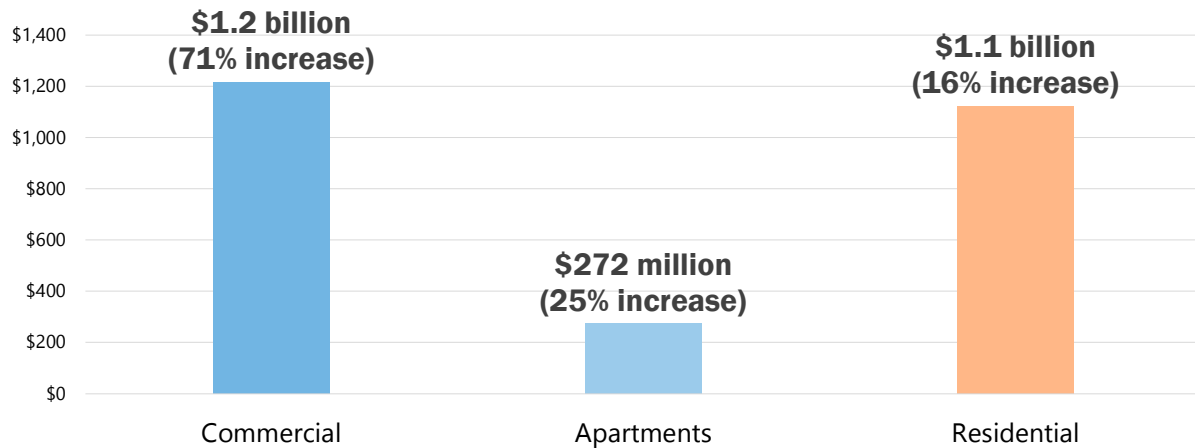


Source: Orange County Tax Assessor

252

Chapel Hill commercial value grows by \$1.2 billion, residential by \$1.1 billion

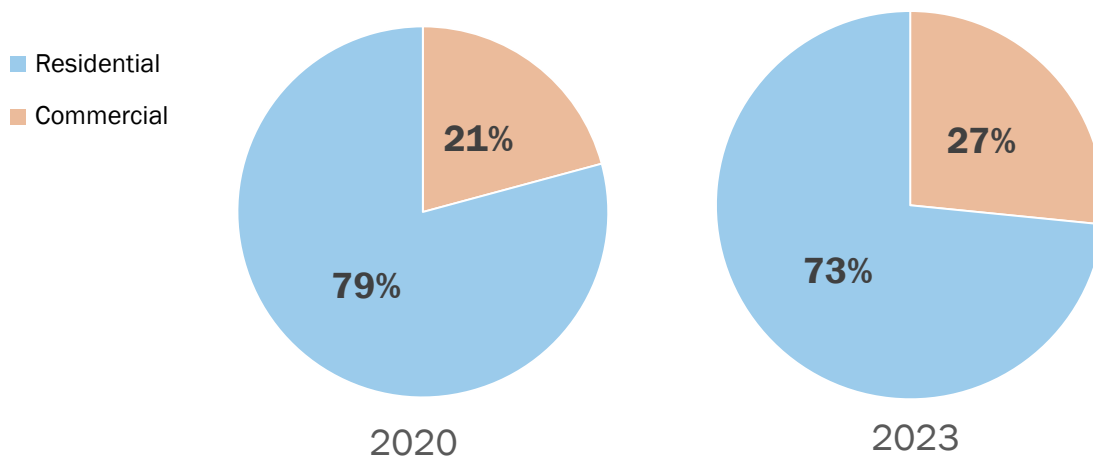
Increase in Chapel Hill assessed value by sector from 2020 to 2023 (in millions)



Source: Orange County Tax Assessor

253

Orange County residential/commercial property value percentages 2020 and 2023

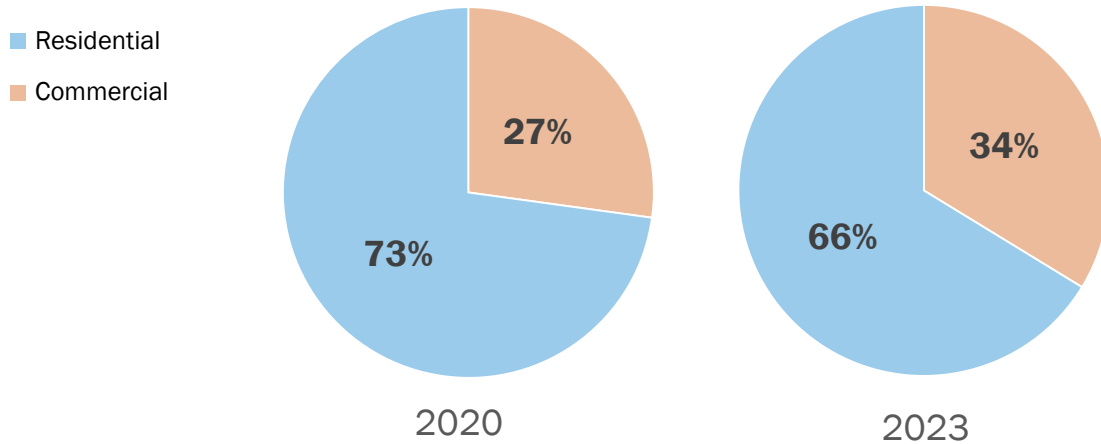


The Orange County Tax Assessor categorizes all assessed property as either commercial or residential. Apartments are divided as well with most categorized as commercial and some as residential.

Source: Orange County Tax Assessor

254

Chapel Hill residential/commercial property value percentages in 2020 and 2023

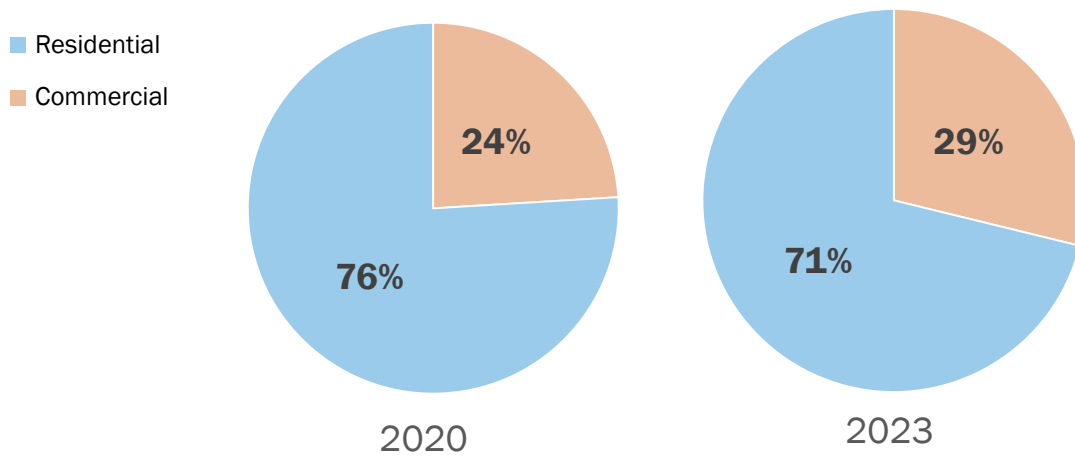


The Orange County Tax Assessor categorizes all assessed property as either commercial or residential. Apartments are divided as well with most categorized as commercial and some as residential.

Source: Orange County Tax Assessor

255

Carrboro residential/commercial property value percentages in 2020 and 2023

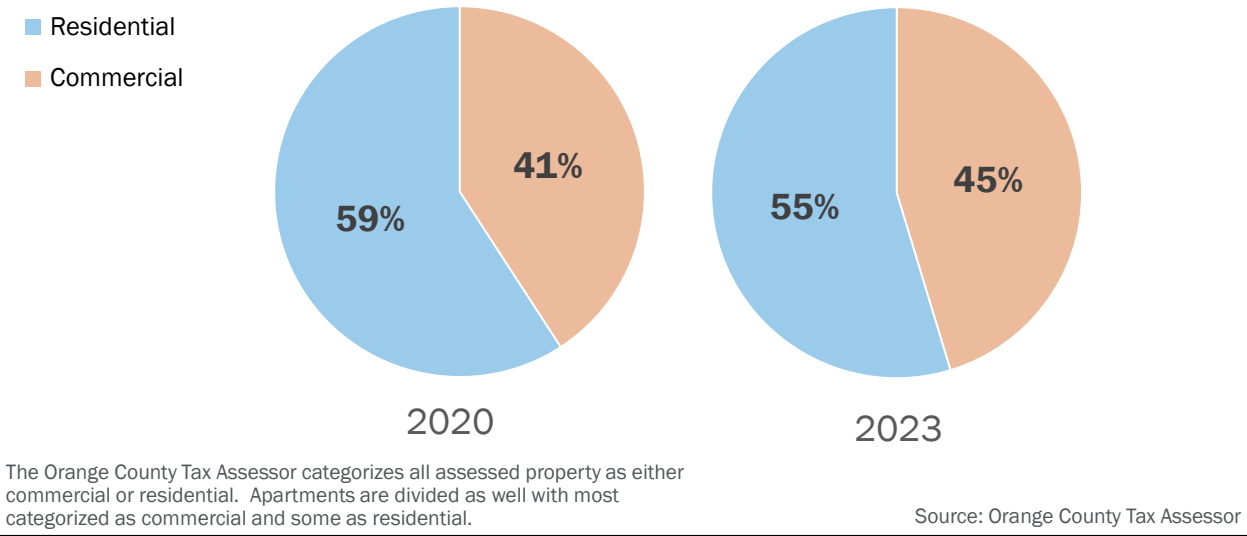


The Orange County Tax Assessor categorizes all assessed property as either commercial or residential. Apartments are divided as well with most categorized as commercial and some as residential.

Source: Orange County Tax Assessor

256

Hillsborough residential/commercial property value percentages in 2020 and 2023



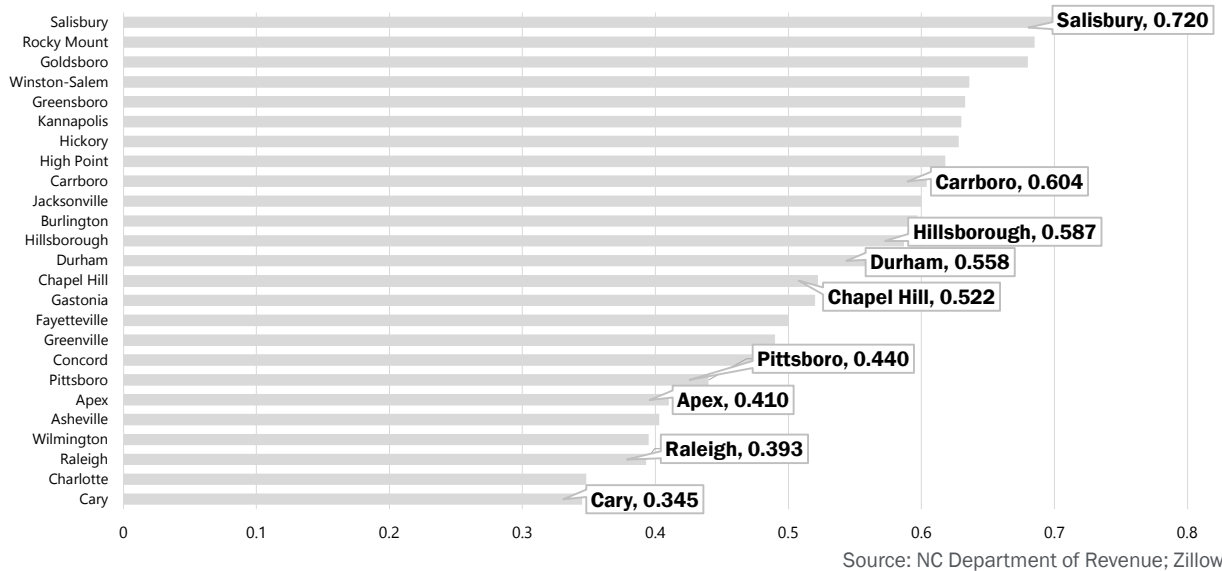
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Property Tax & Tax Rates

258

North Carolina municipal tax rates vary widely

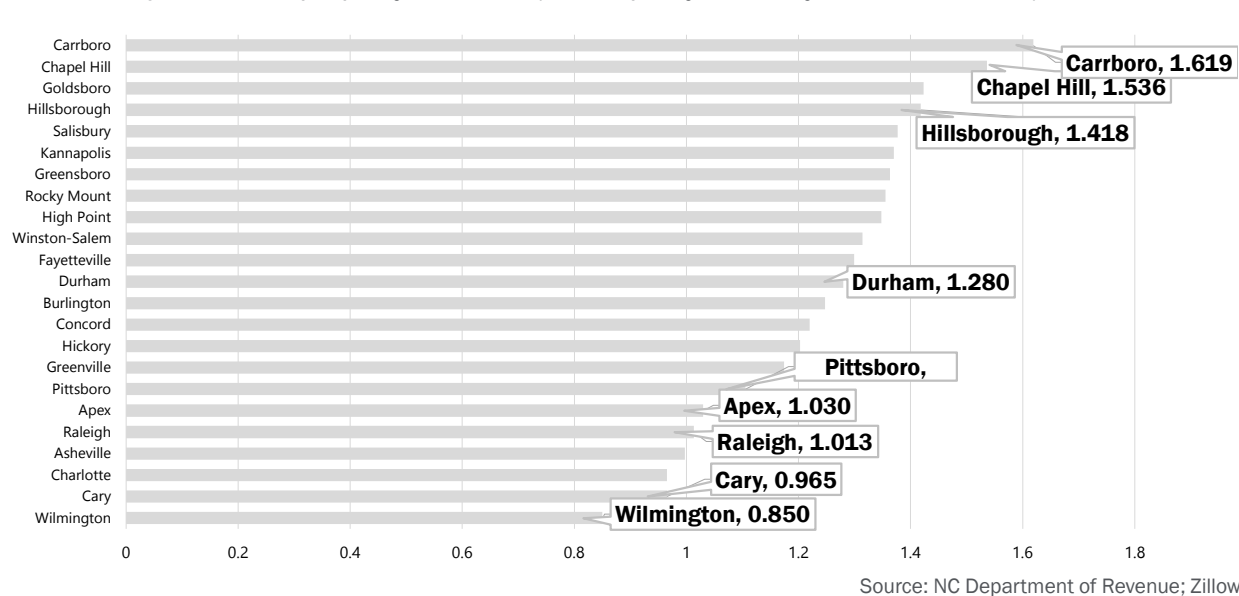
Municipal property tax rates, FY2022-23



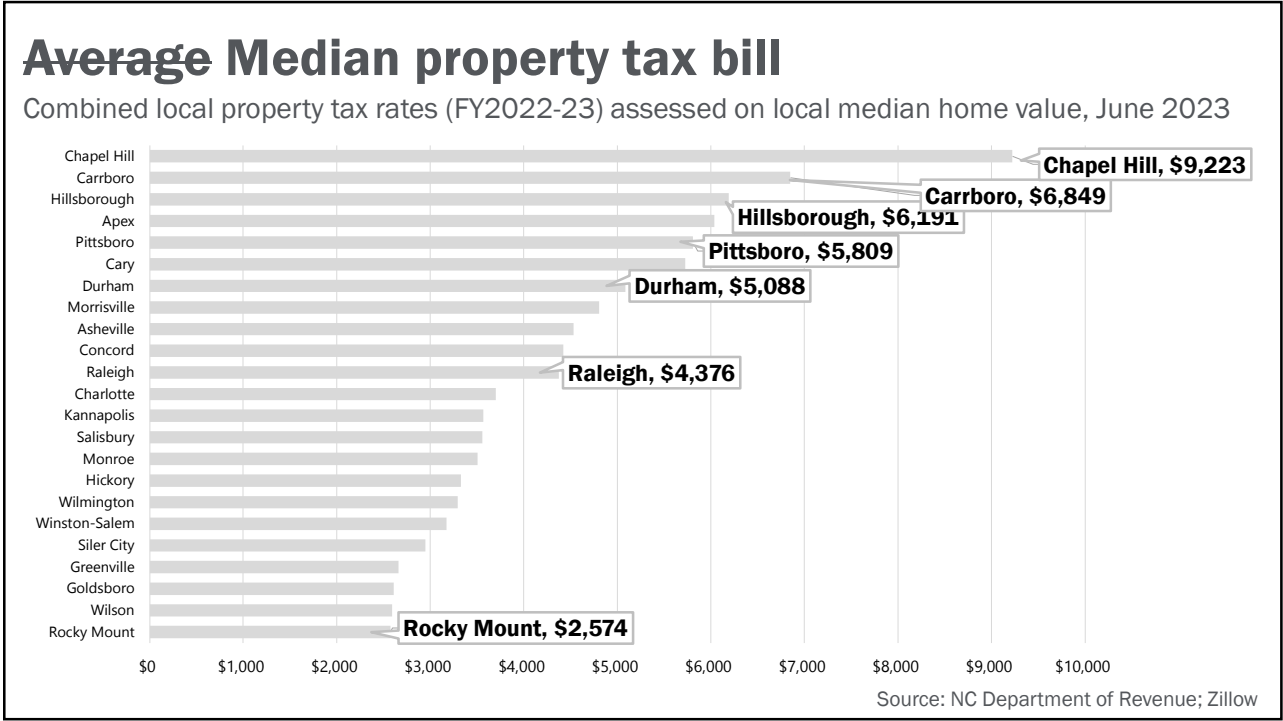
259

Local jurisdictions have highest combined property tax rate

Combined jurisdiction property tax rates (municipality + county + school district), FY2022-23



260



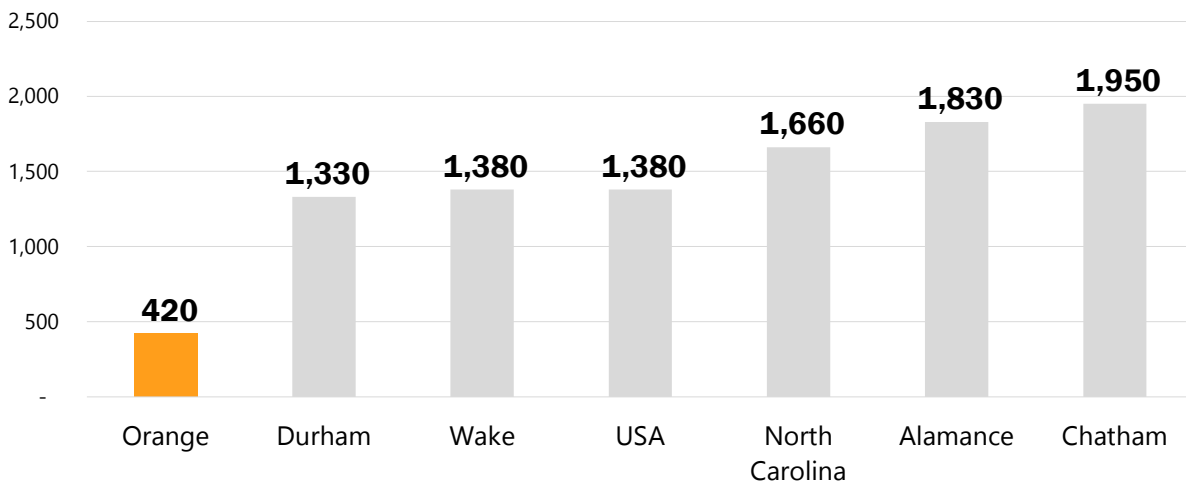
261

Some Other Interesting Information

262

Orange County has a lot of dentists

Number of people in a county for every 1 dentist in the county

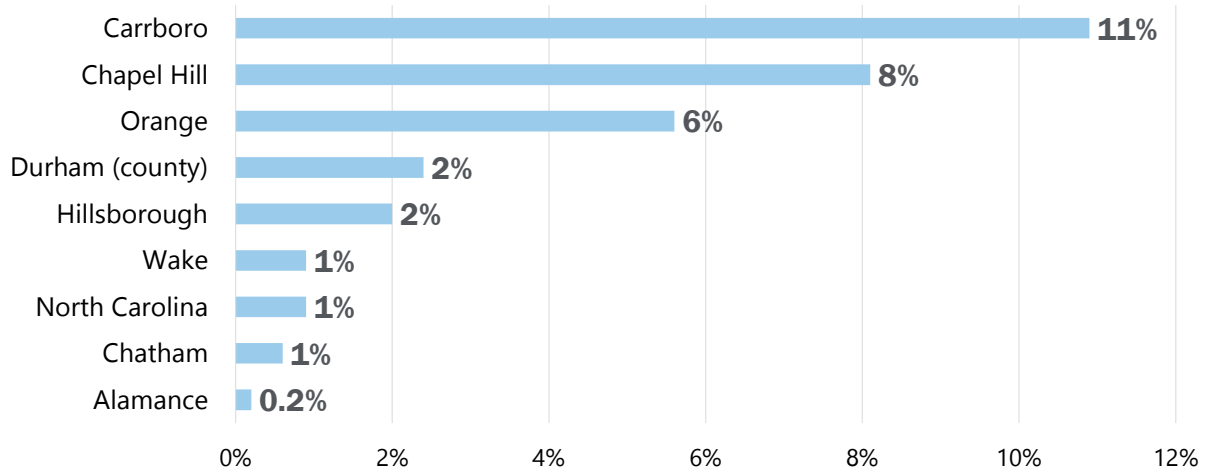


Source: 2023 Robert Wood Johnson Foundation Health Rankings

263

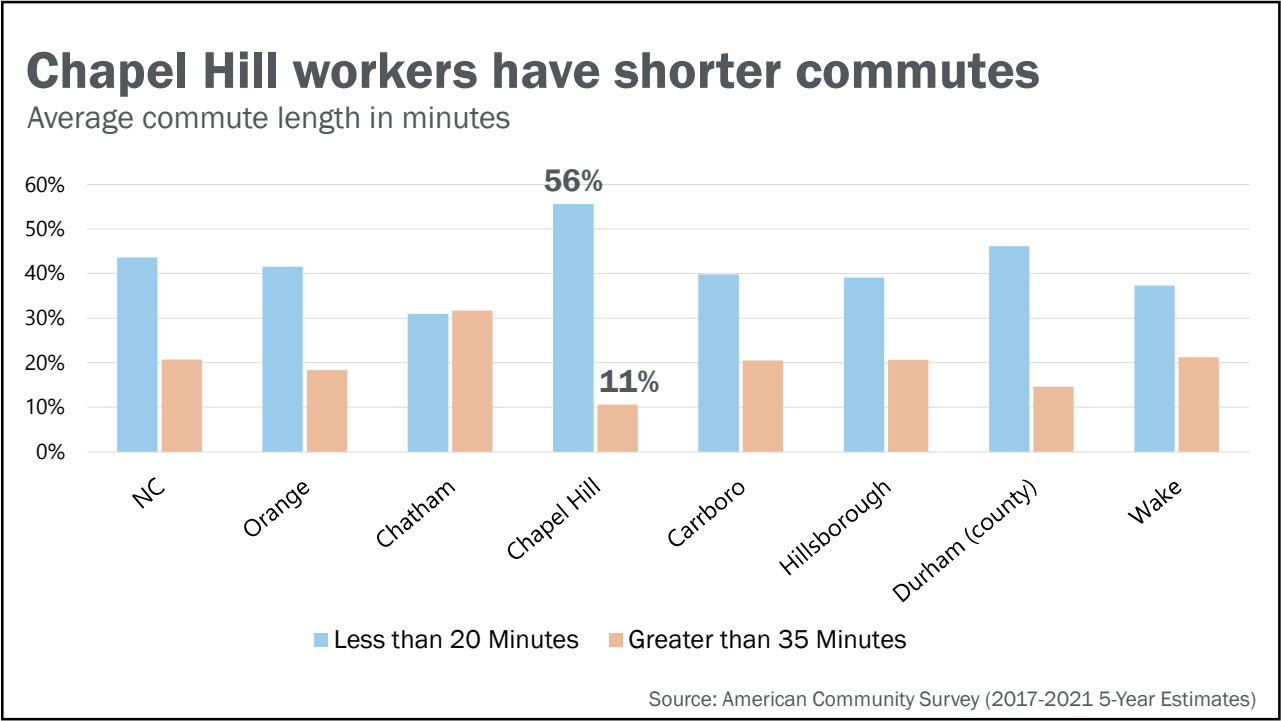
Carrboro and Chapel Hill residents most likely to take public transportation to work

Percent of working residents who report taking public transportation to work

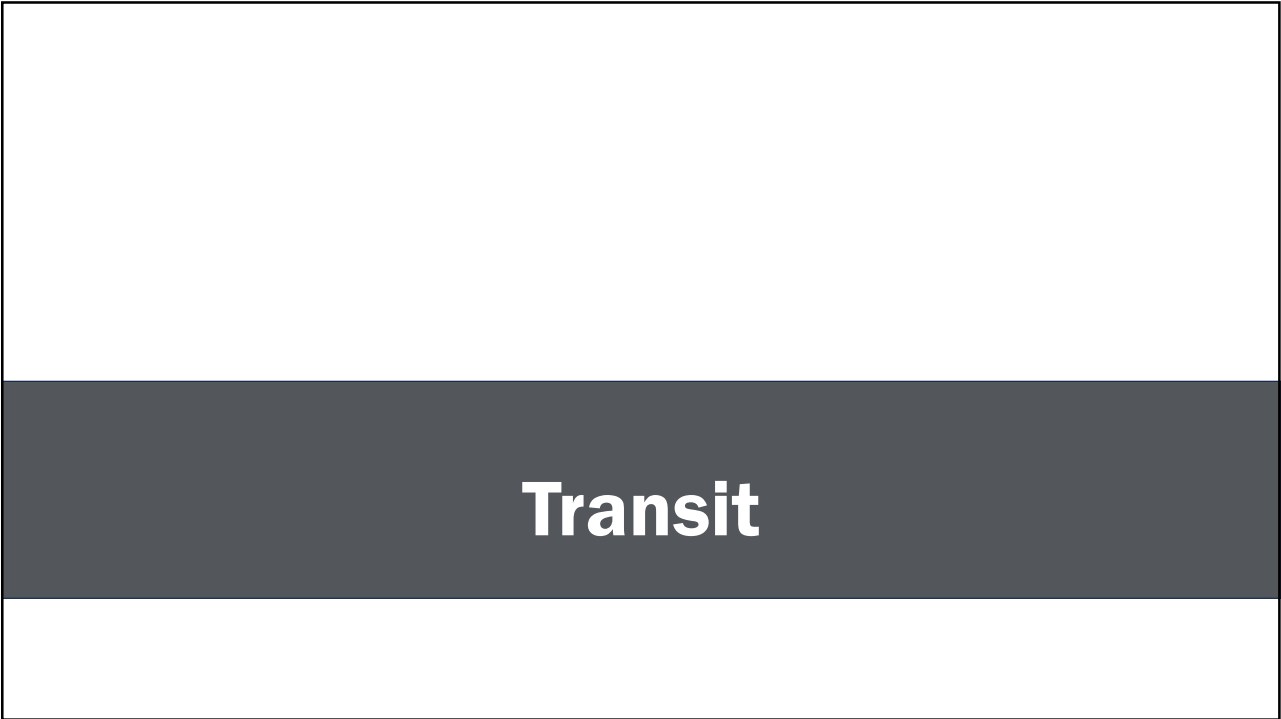


Source: American Community Survey (2017-2021 5-Year Estimates)

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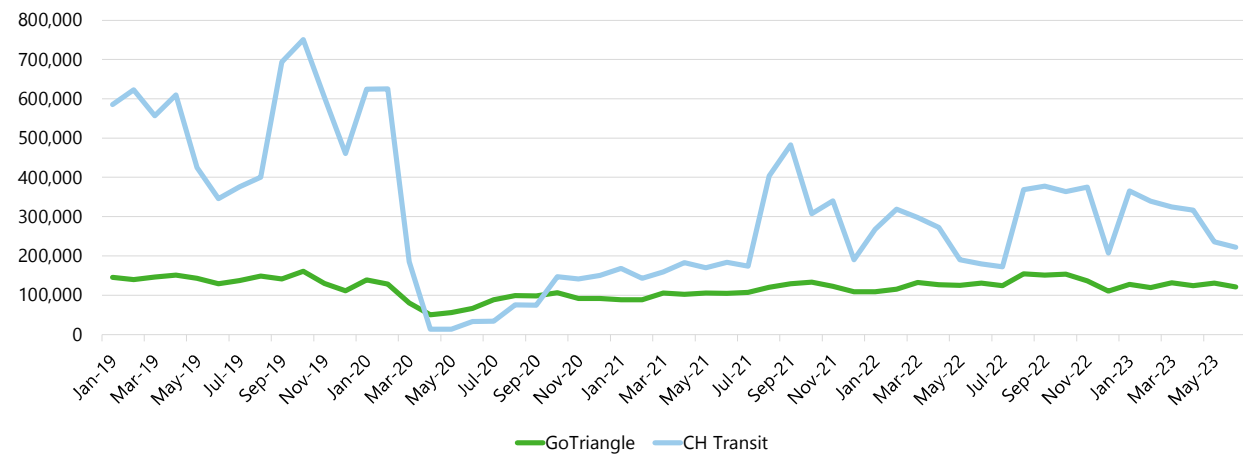
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Pandemic impact on Chapel Hill Transit and Go-Triangle Ridership

Monthly Chapel Hill Transit compared to Go Triangle Ridership Jan 2019 – June 2023

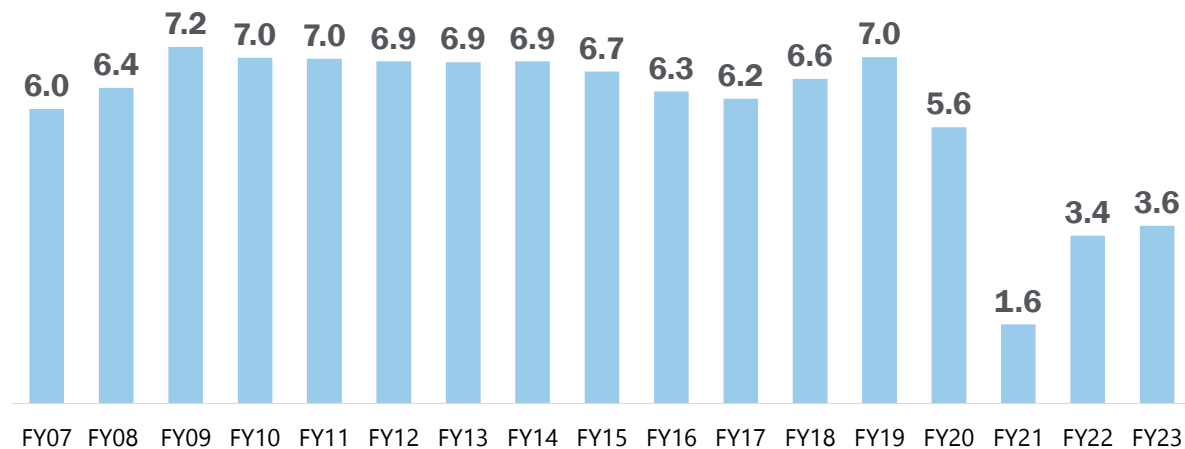


Source: CH Transit, GoTriangle

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Chapel Hill Transit ridership rebounding; still below 2019 peak

Annual Chapel Hill Transit ridership from FY2007 – FY2023 (in millions)



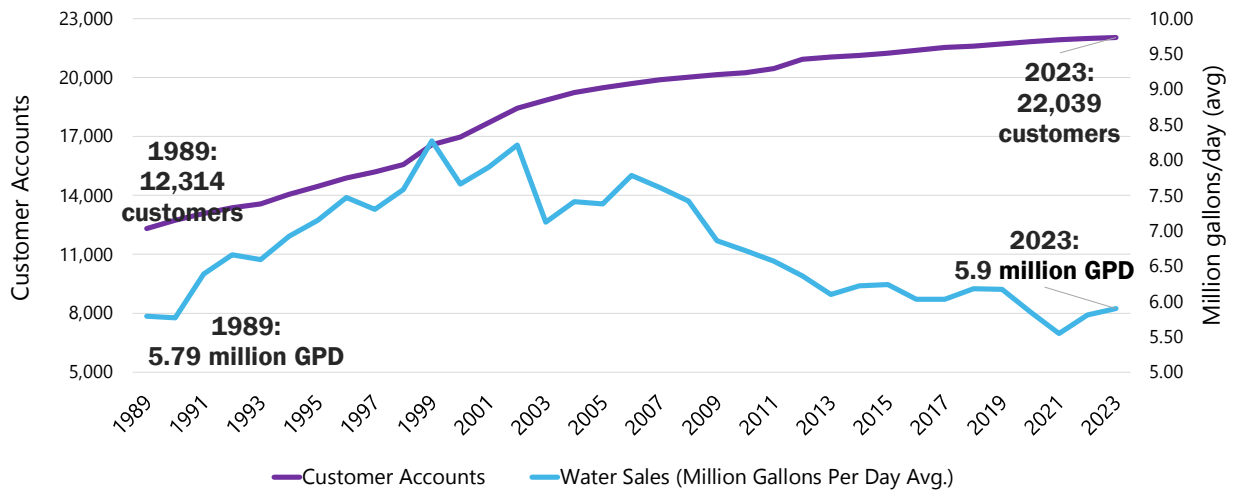
Source: Chapel Hill Transit

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Water

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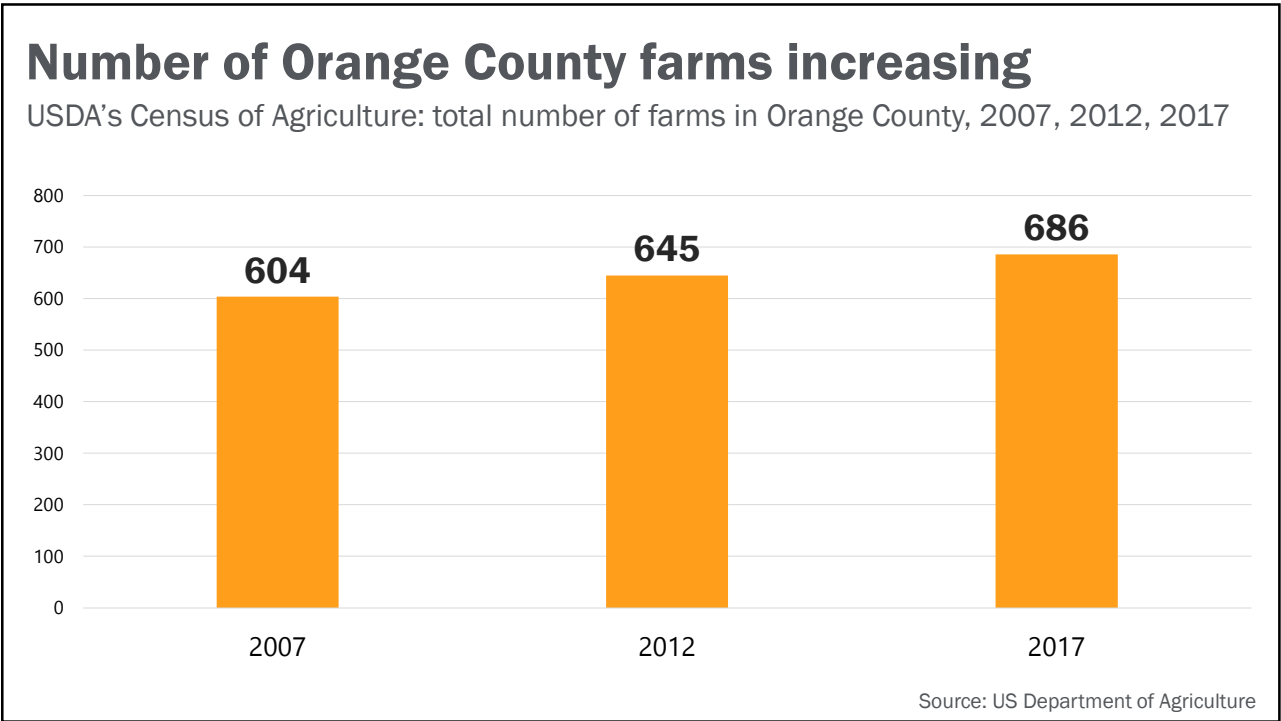
OWASA total customer accounts & daily water sales



270



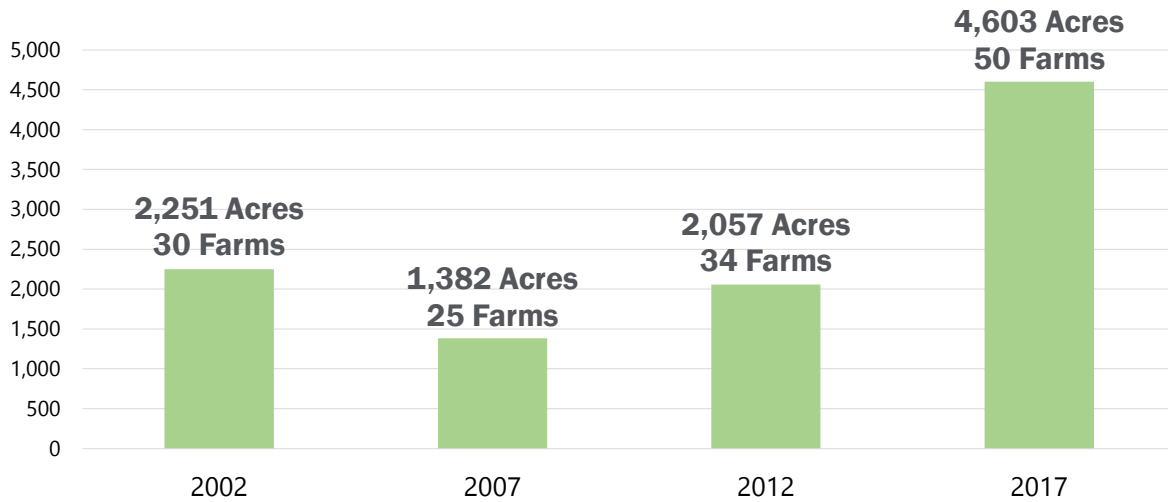
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Orange County Black & African American farm operations and acres farmed

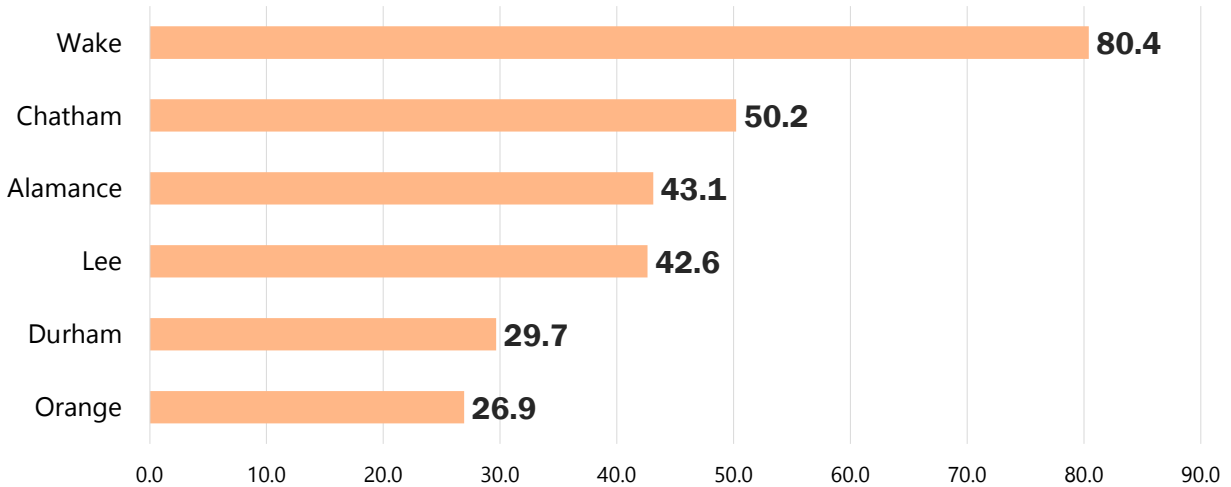
USDA's Census of Agriculture: total number of farms in Orange County, 2002, 2007, 2012, 2017



Source: US Department of Agriculture

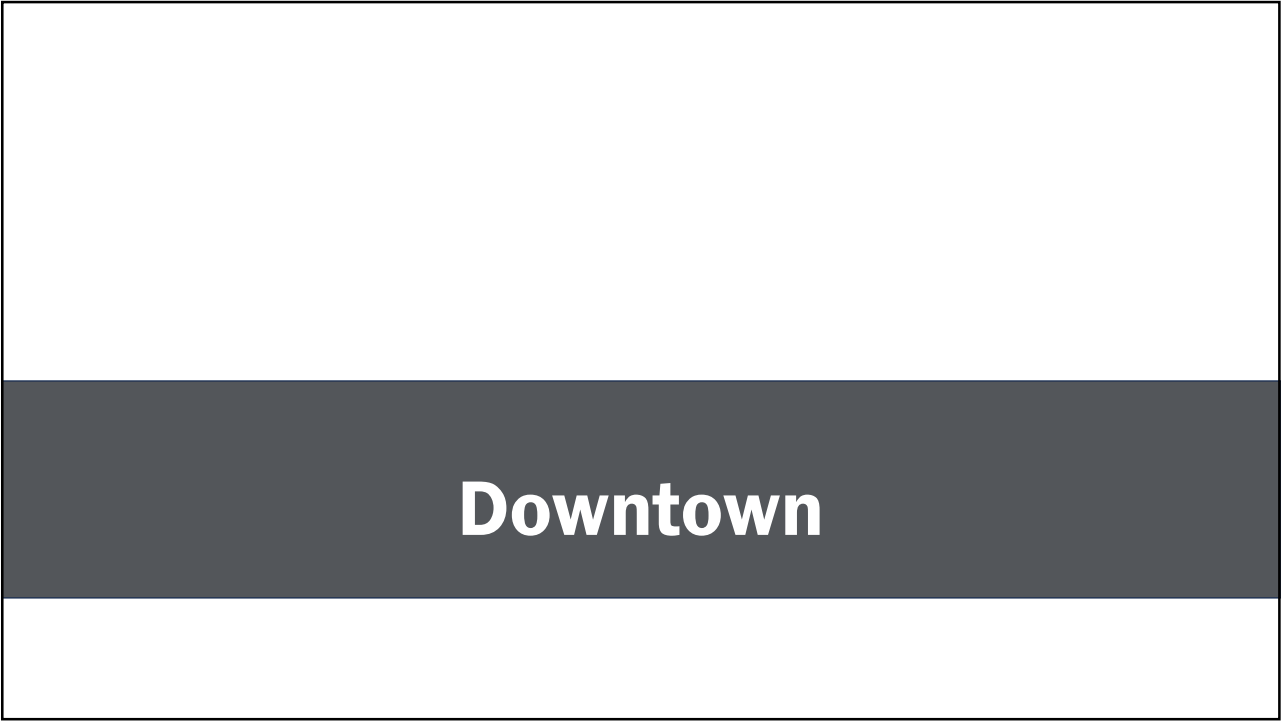
273

County solar energy capacity (megawatts)

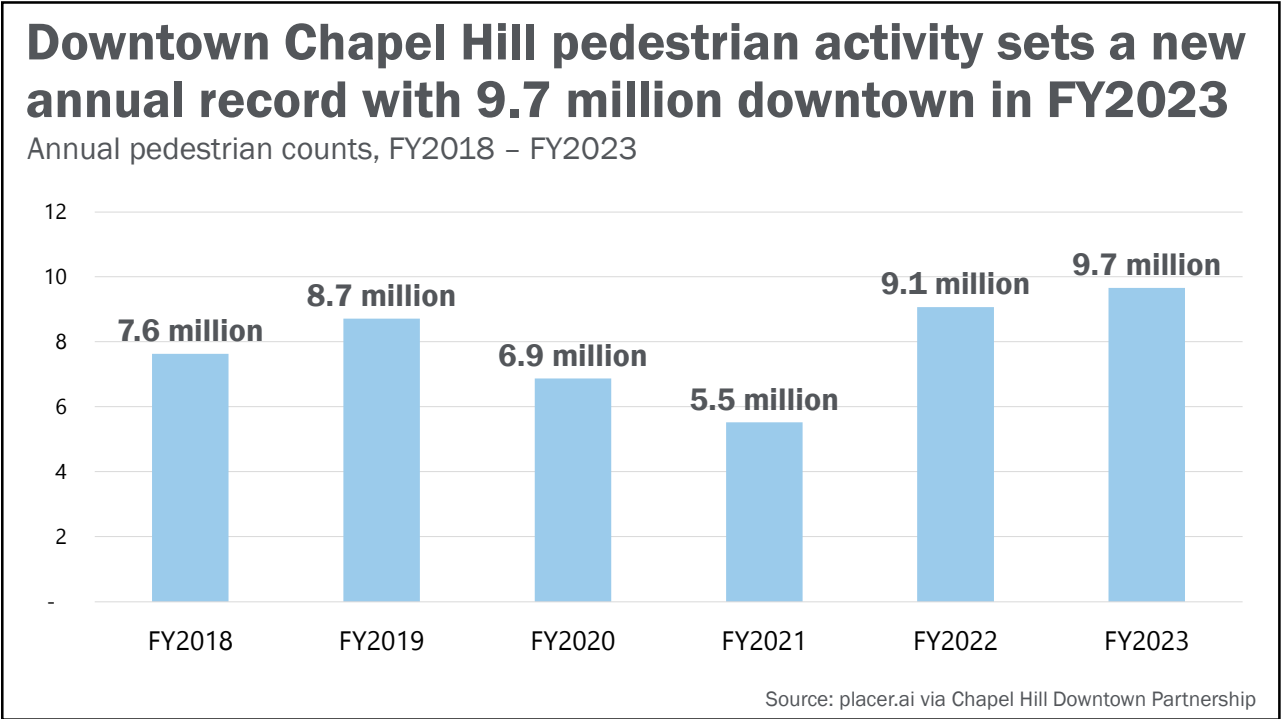


Source: NC Sustainable Energy Association, 2023

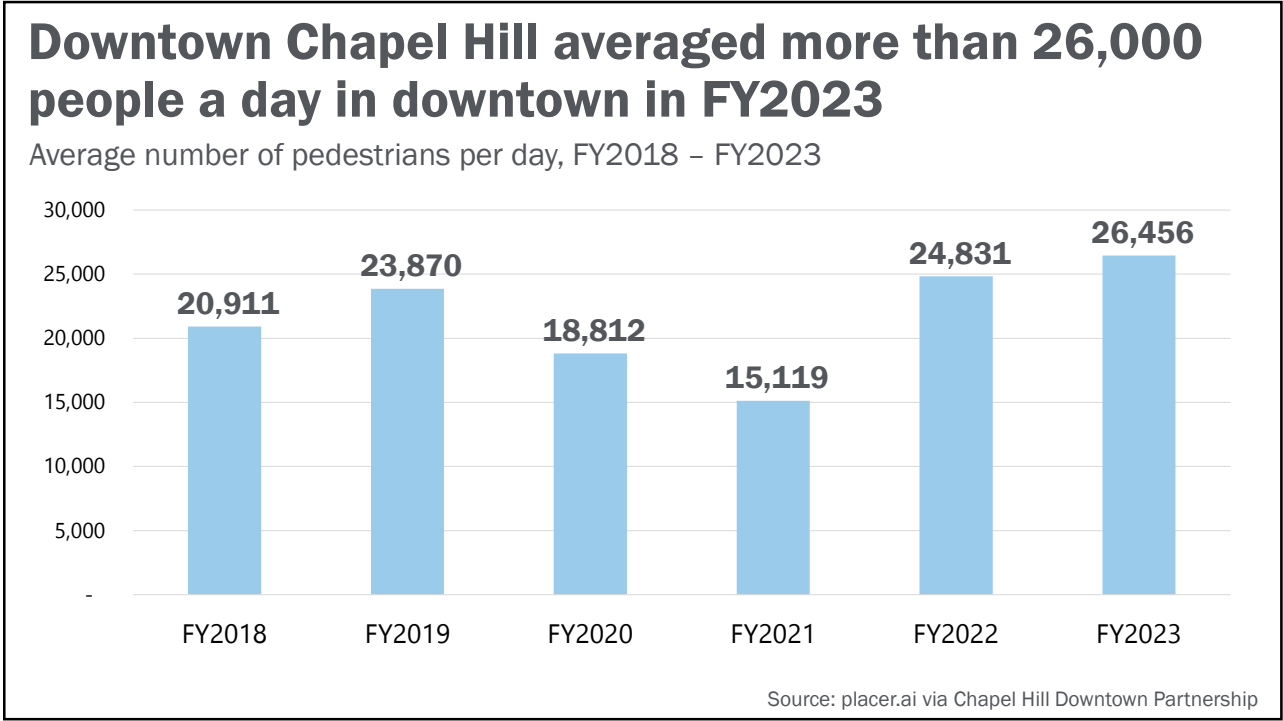
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Orange County ranks 8th in NC public recycling per capita

FY 2022

NC Rank	County	lbs/Person
1	Wilson	334
8	Orange	216
22	Durham	151
37	Lee	123
40	Wake	120
45	Chatham	106
53	Alamance	90

Source: NC Division of Environmental Assistance and Customer Service (DEACS)

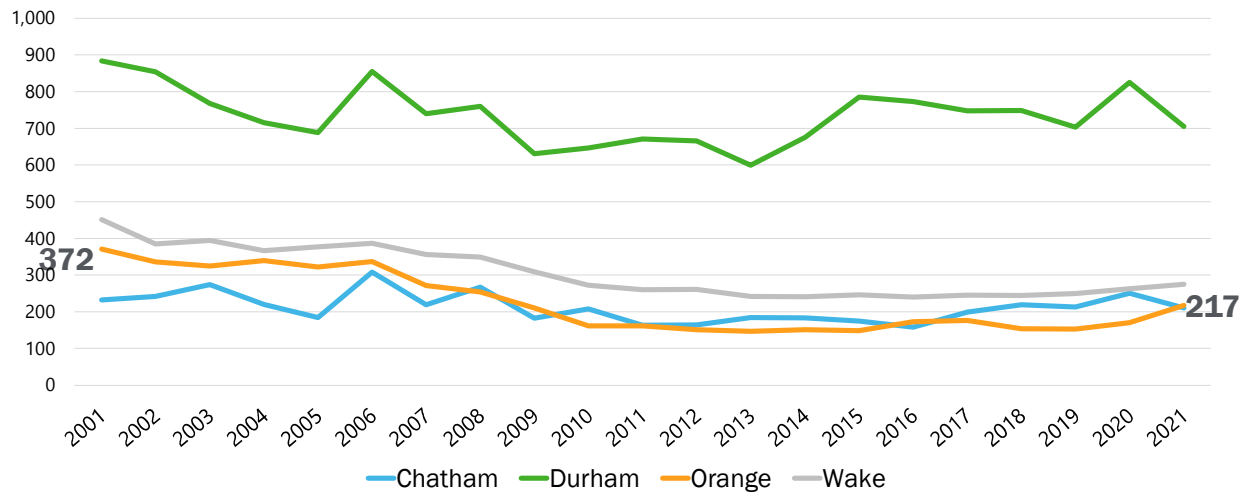
279

Crime

280

Violent crime down since 2001, but up from 2016

Violent crimes per 100,000 residents (2001 – 2021)

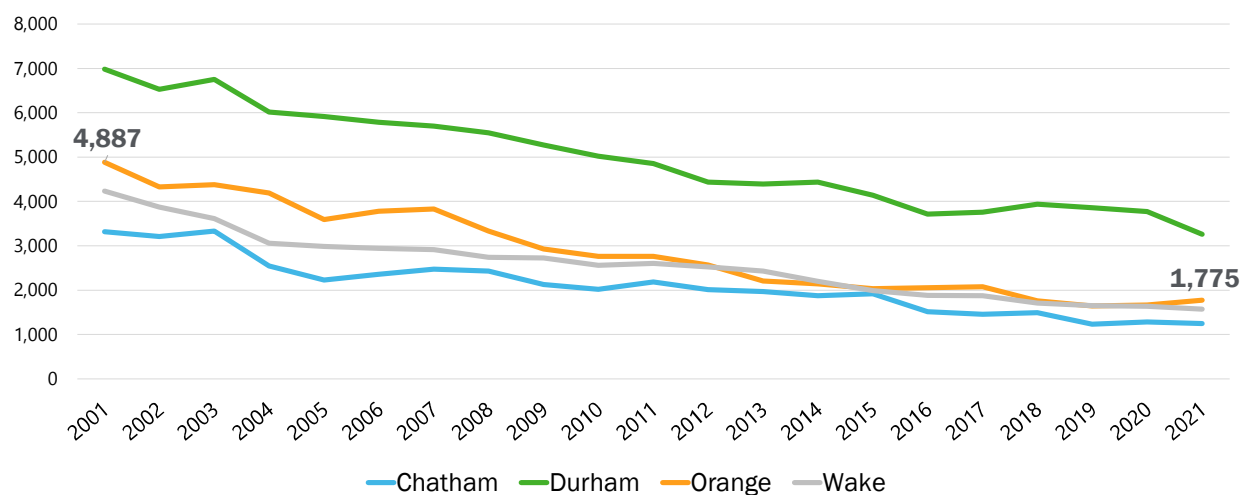


Source: NC State Bureau of Investigation

281

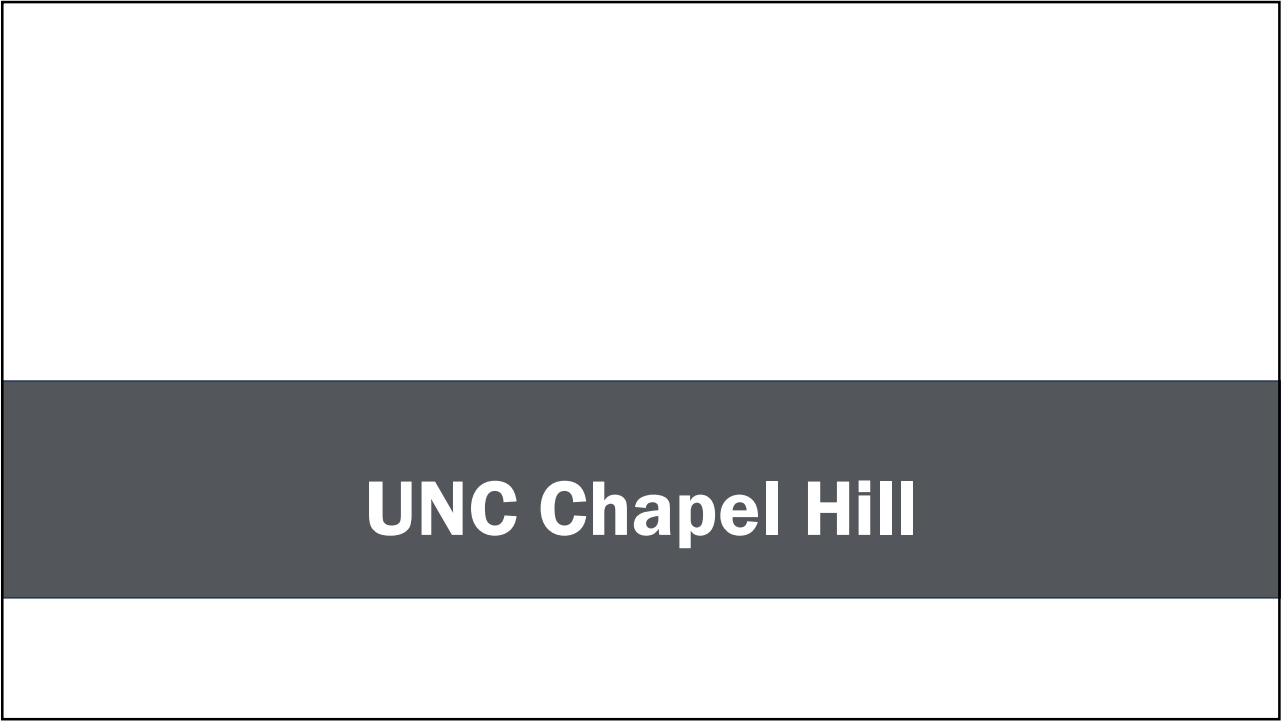
Property crime falls consistently with slight uptick in 2021

Property crimes per 100,000 residents (2001 – 2021)

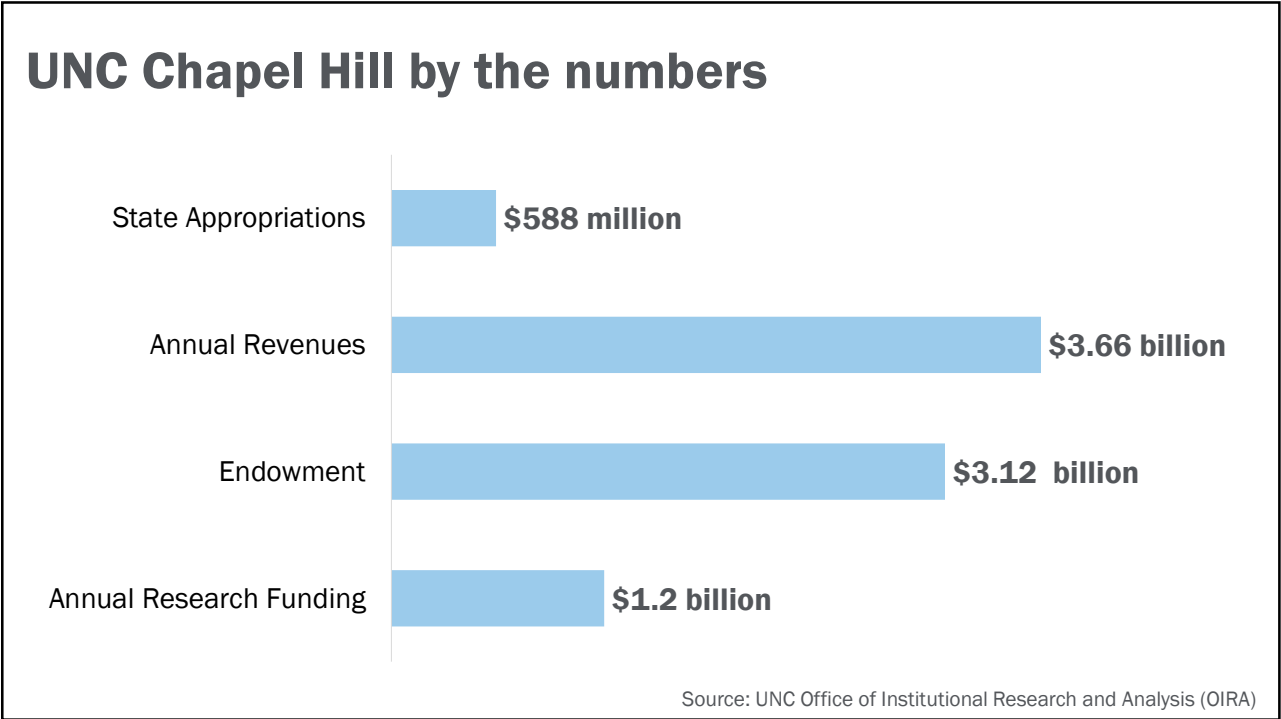


Source: NC State Bureau of Investigation

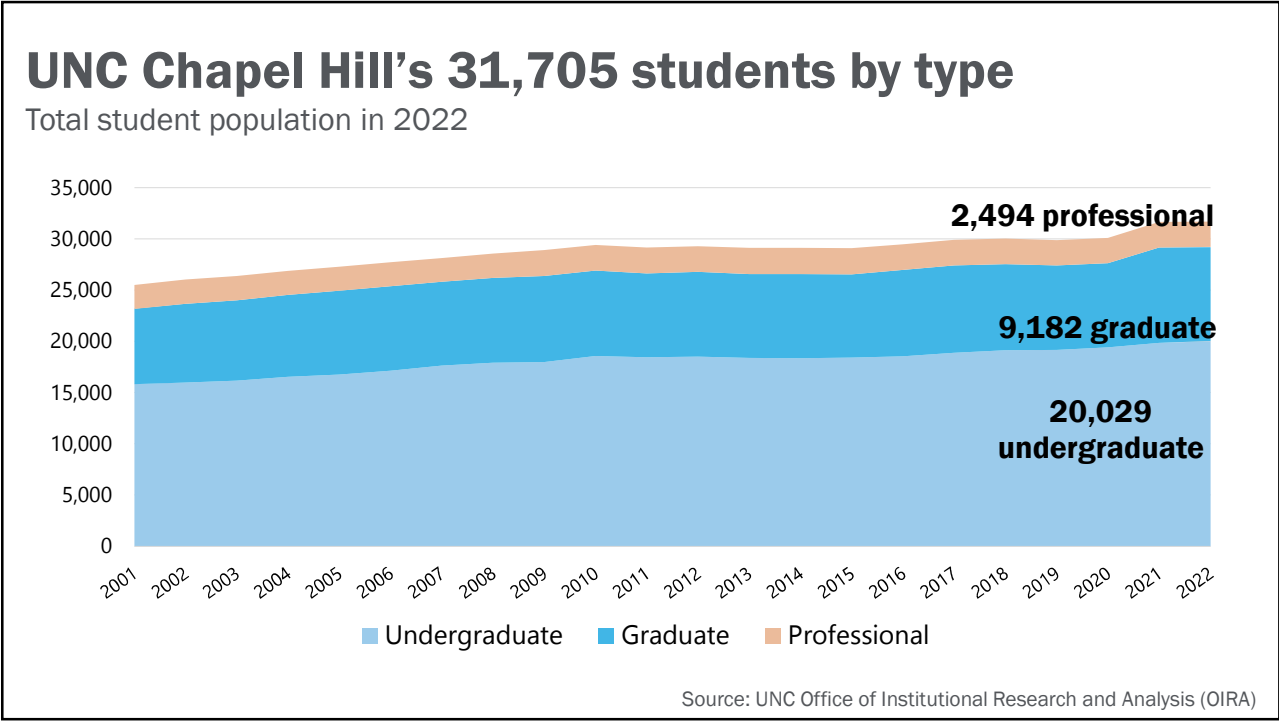
282



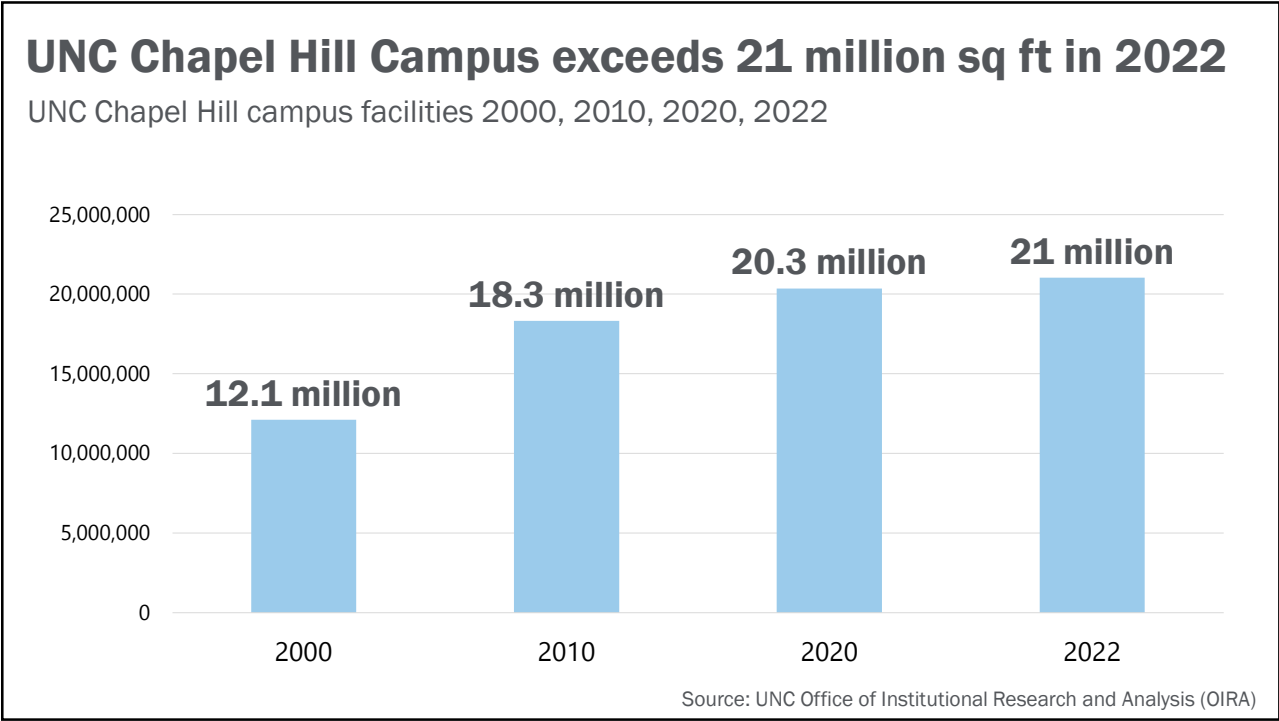
283



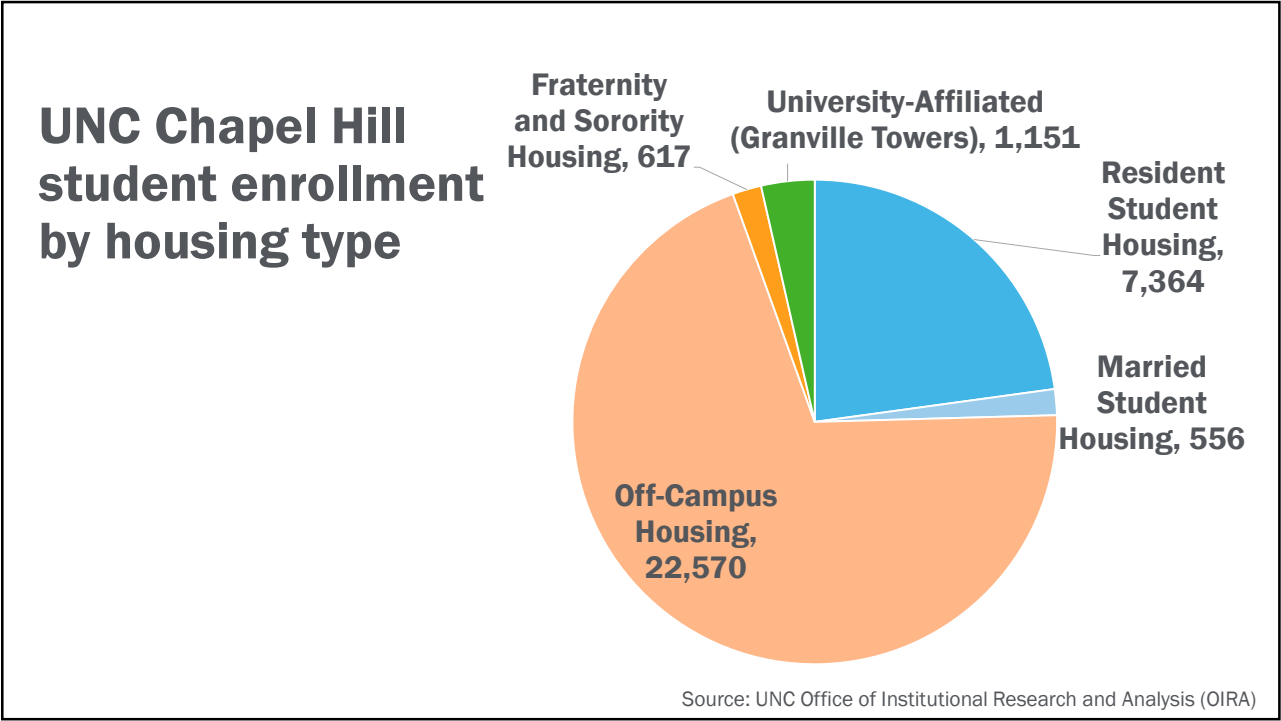
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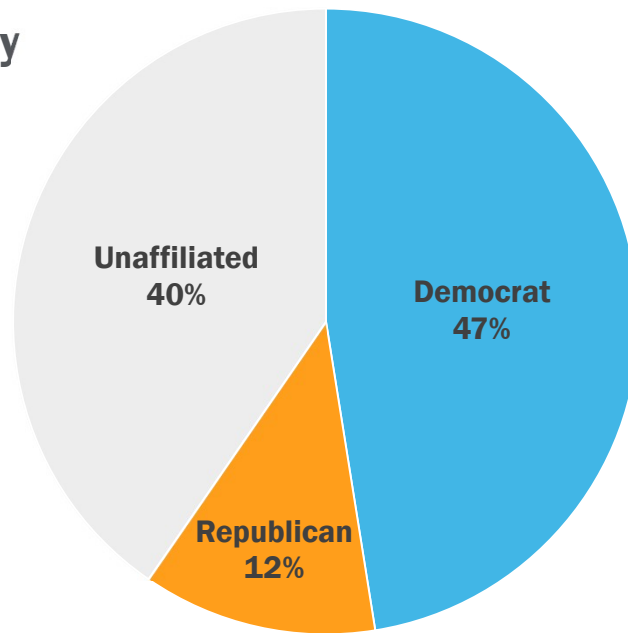
287

Voter Registration

288

Majority of Orange County voters are registered Democrat or Unaffiliated

Voter registration by party as of July 11, 2023 (50,009 total voters)

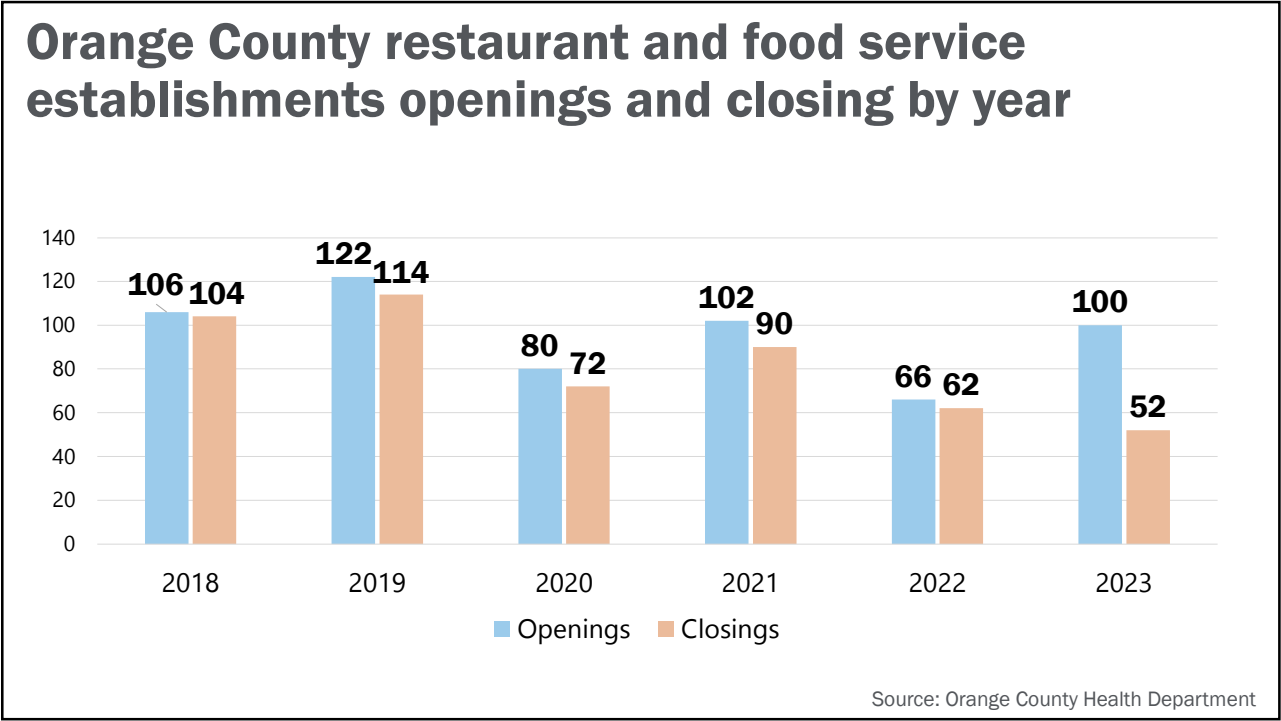


Source: NC State Board of Elections

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Restaurants Open and Close

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Thank you | DataBook | Survey

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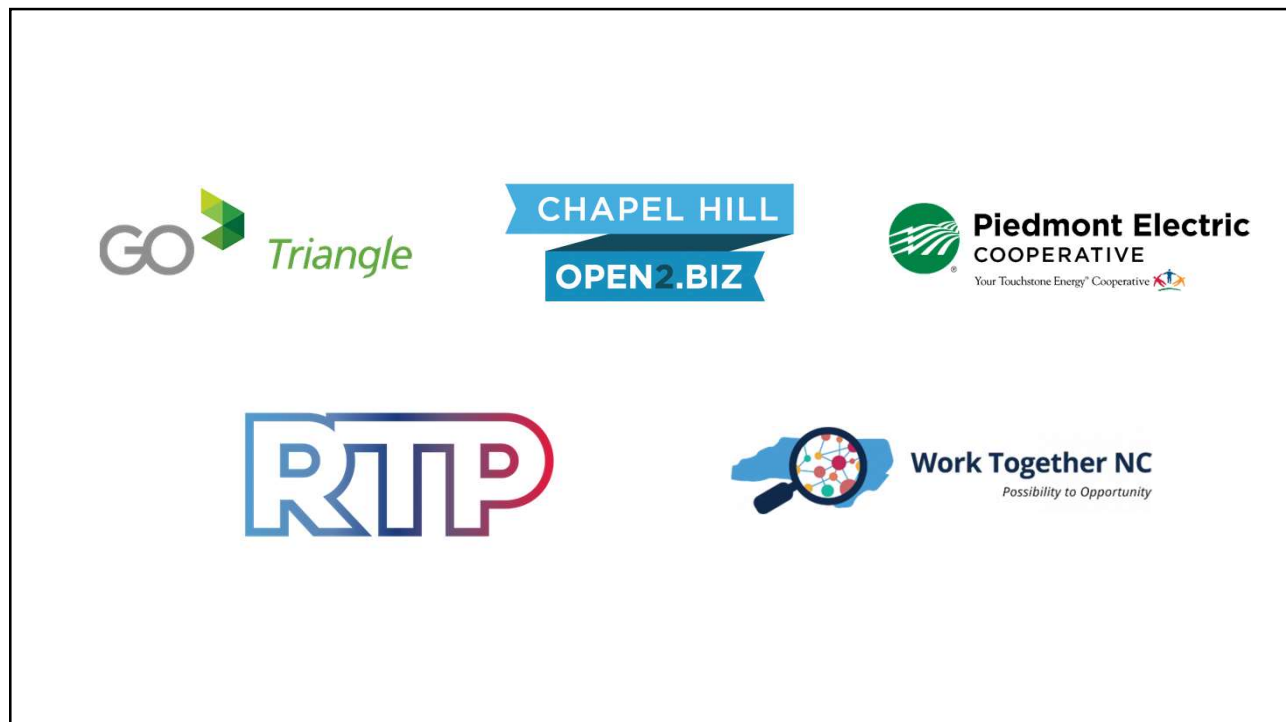
Presenting Sponsors



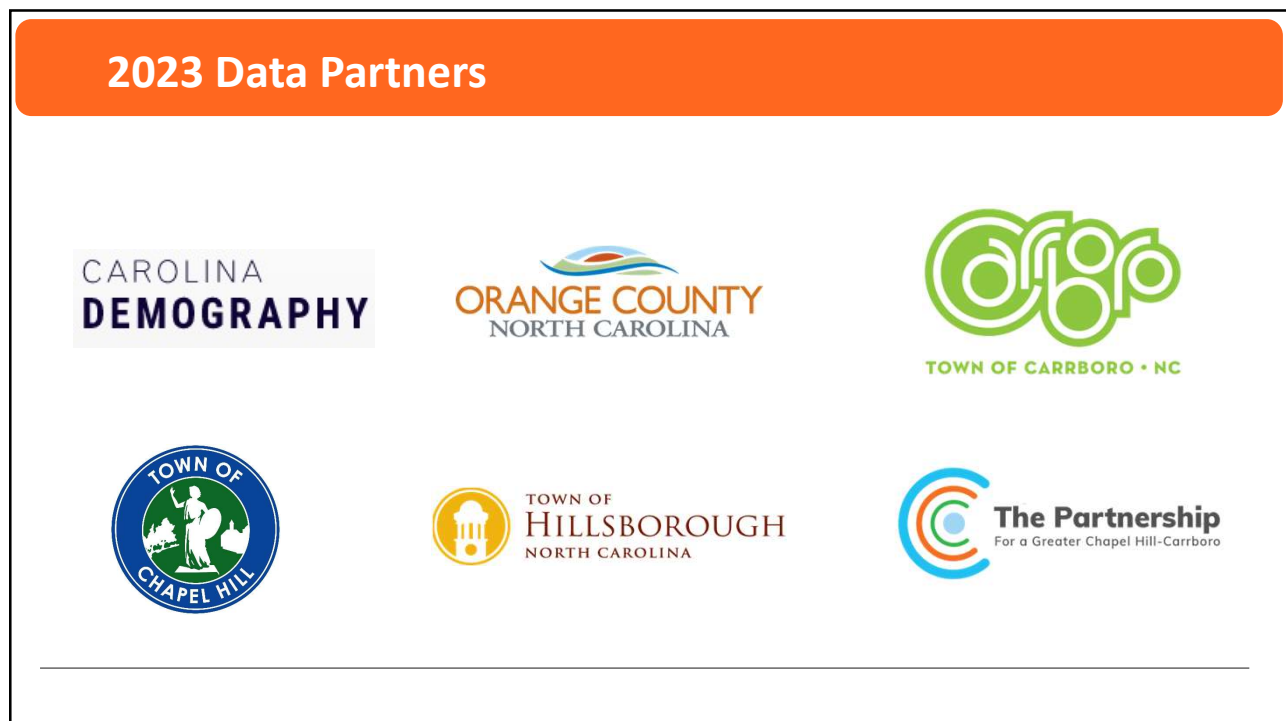
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