



The Chamber

For a Greater Chapel Hill-Carrboro

16th Annual State of the Community Report 2023 Databook

Data Partners



2023 Community Champions

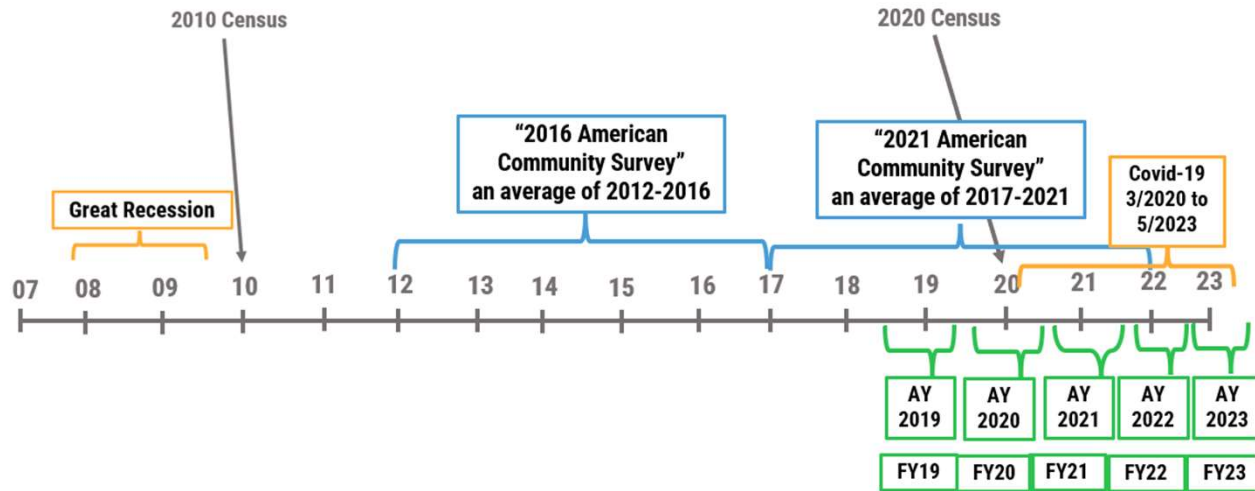


THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL

Table of Contents

2023 Context	1
Geography	2
Demographics	10
Population Growth & Change	22
Population Projections & Density	48
Migration	58
Public School Enrollment & Funding	63
Student Performance	80
High School, Graduation & Post-Secondary Intentions	97
Housing (For Sale) & Homeownership	112
Housing (For Rent)	127
Commuting/Worker Ins & Outs	142
UNC Chapel Hill	169
Durham Tech	174
Health Indicators	182
Poverty & Food Insecurity	207
Homelessness	218
Internet Access	223
Employers & Industries	226
Unemployment & Labor Force	238
Wages & Income	245
Cost of Living	260
Retail Sales, Taxes, Revenue, & Disbursements	266
Assessed Property Value	282
Property Tax & Tax Rates	291
Chamber Small Business Index	295
Tourism & Hospitality	299
Transit & Transportation	308
Environment	316
Farming	325
Downtown Chapel Hill	332
Crime	335
Voter Registration	339

2023 Context

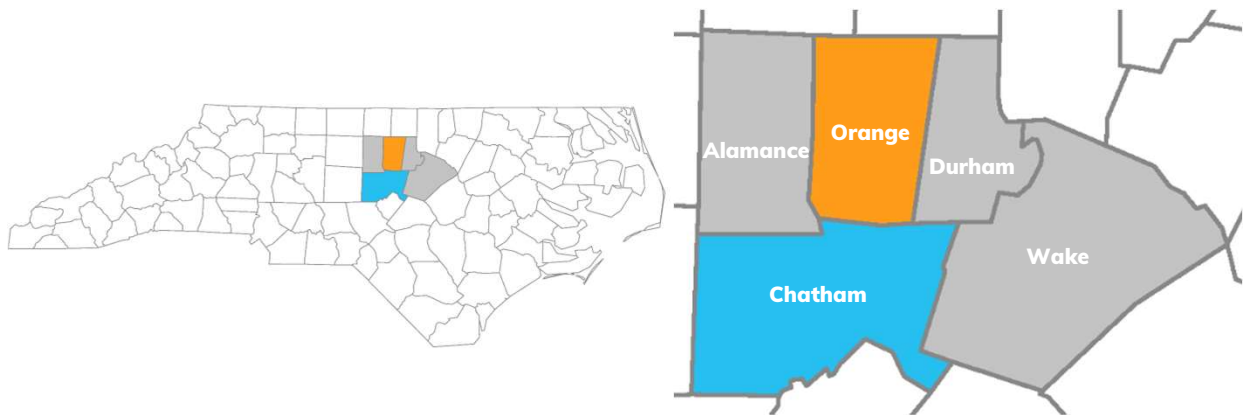


1

Geography

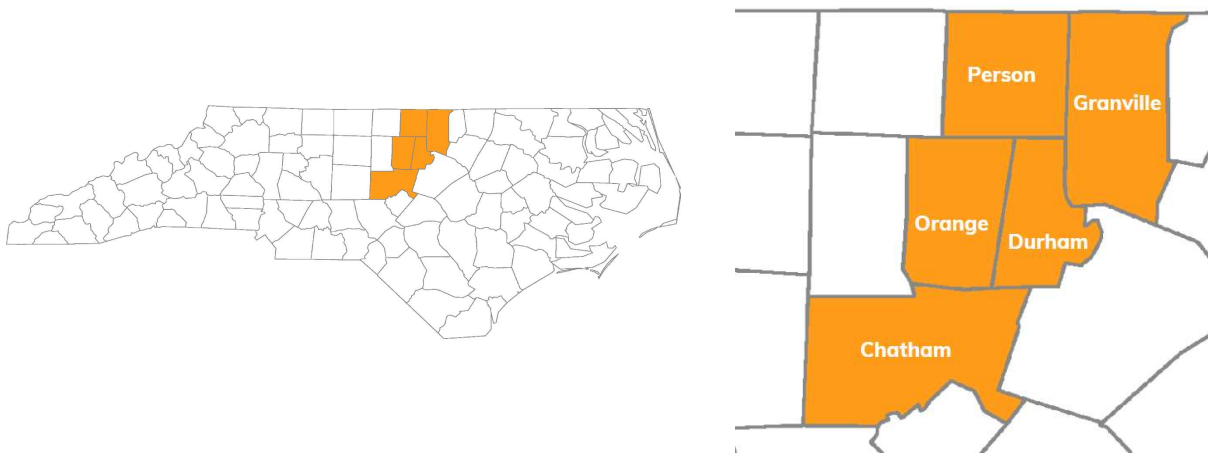
2

Orange County + Chatham County + Neighbors



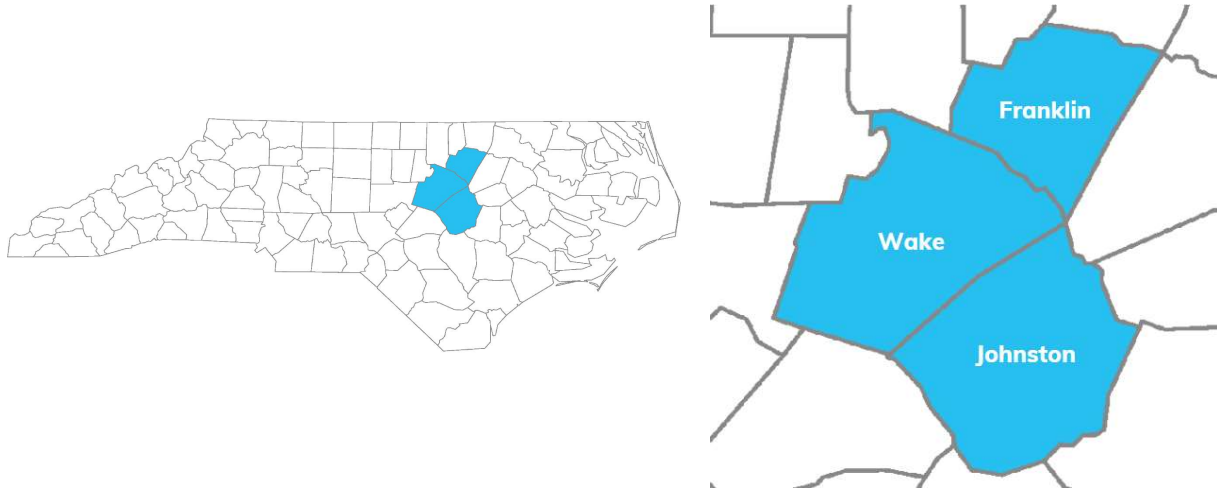
3

Durham-Chapel Hill Metropolitan Statistical Area (MSA)



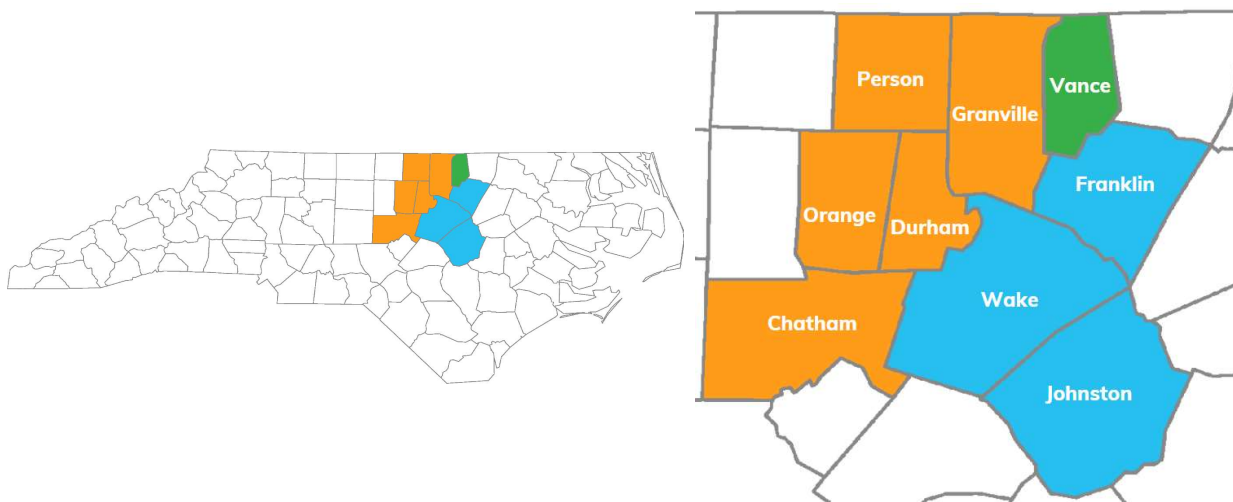
4

Raleigh-Cary Metropolitan Statistical Area (MSA)



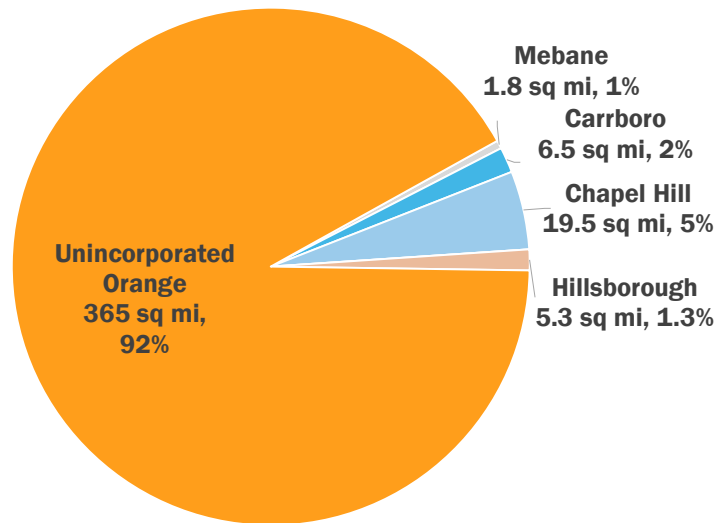
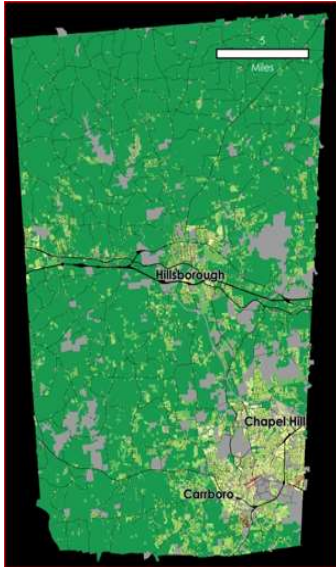
5

Raleigh-Durham-Cary Combined Statistical Area (CSA)



6

Orange County Land and Municipal Boundaries

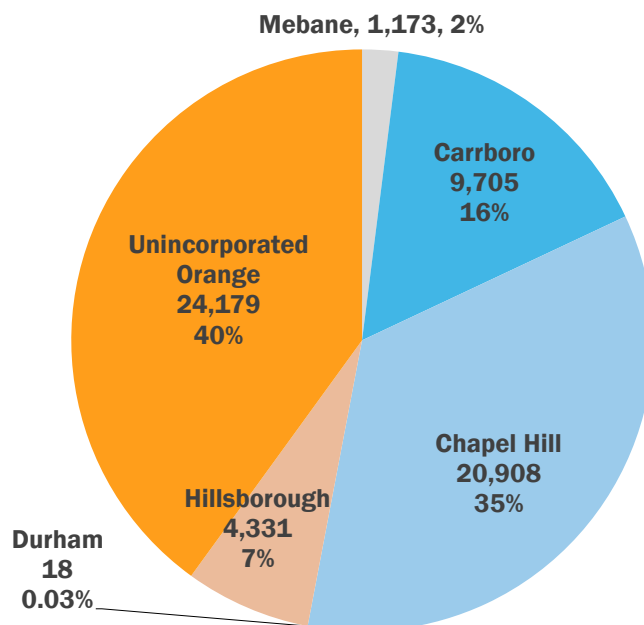


Source: American Community Survey (2017-2021 5-Year Estimates)

7

Orange County housing unit breakdown

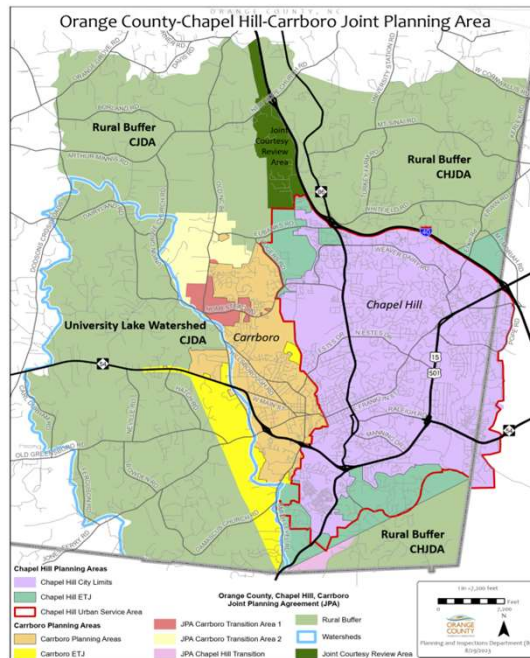
60,314 total housing units



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

8

Orange County's Rural Buffer



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

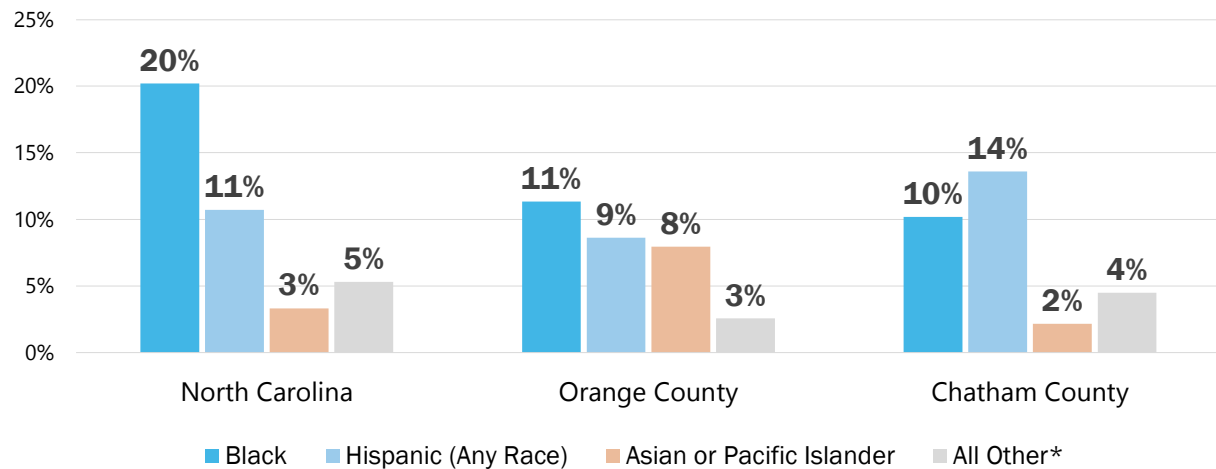
9

Demographics:

- Race/Ethnicity
- Educational Attainment

10

State and county minority makeup

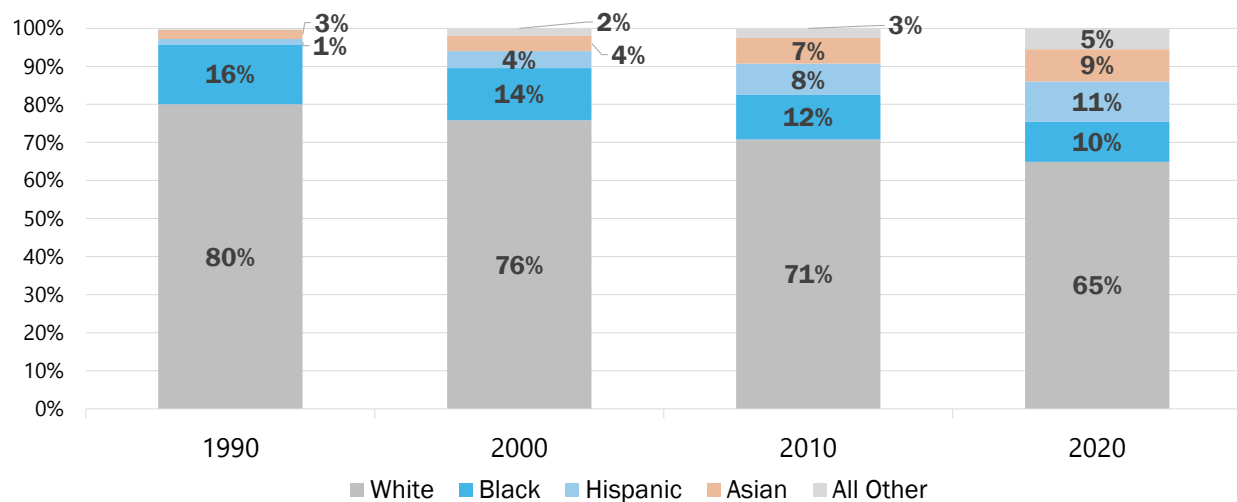


Note: "All Other" includes American Indian, other races, and multiracial. The Census changed their way of measuring race/ethnicity in the 2020 Census.

Source: US Census Bureau Decennial Census

11

Orange County population by race/ethnicity

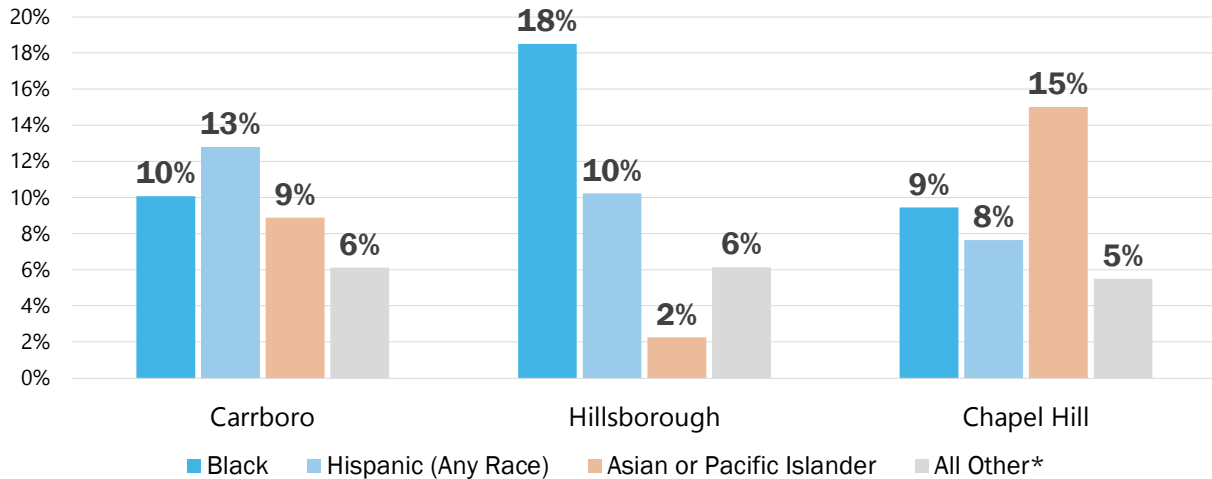


Note: "All Other" includes American Indian, other races, and multiracial. The Census changed their way of measuring race/ethnicity in the 2020 Census.

Source: US Census Bureau Decennial Census

12

Municipal minority make-up



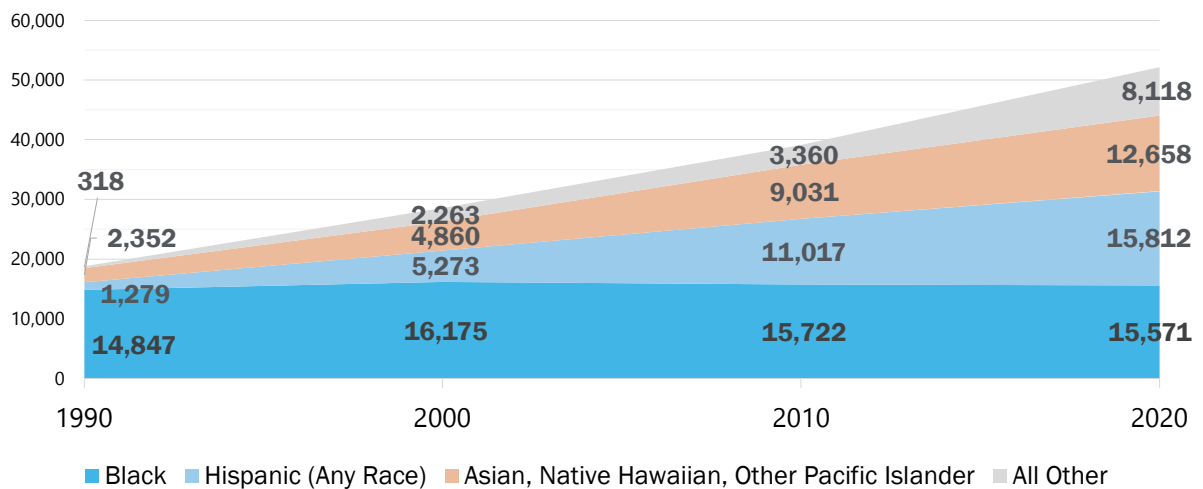
Note: "All Other" includes American Indian, other races, and multiracial. The Census changed their way of measuring race/ethnicity in the 2020 Census.

Source: US Census Bureau Decennial Census

13

Orange County minority population by race/ethnicity

Changes in racial makeup by decade



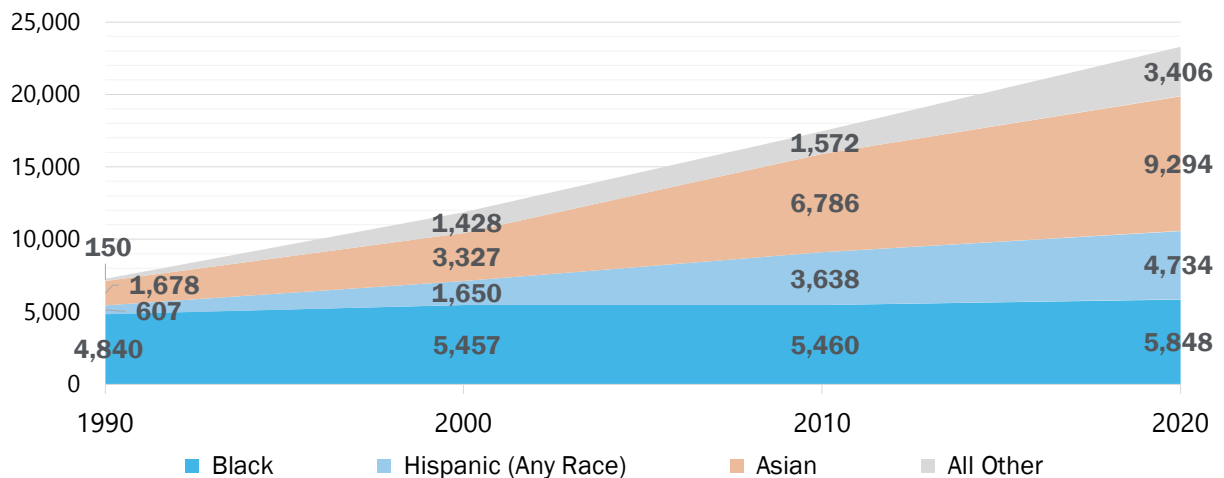
Note: "All Other" includes American Indian, other races, and multiracial. The Census changed their way of measuring race/ethnicity in the 2020 Census.

Source: US Census Bureau Decennial Census

14

Chapel Hill minority population by race/ethnicity

Changes in racial makeup by decade



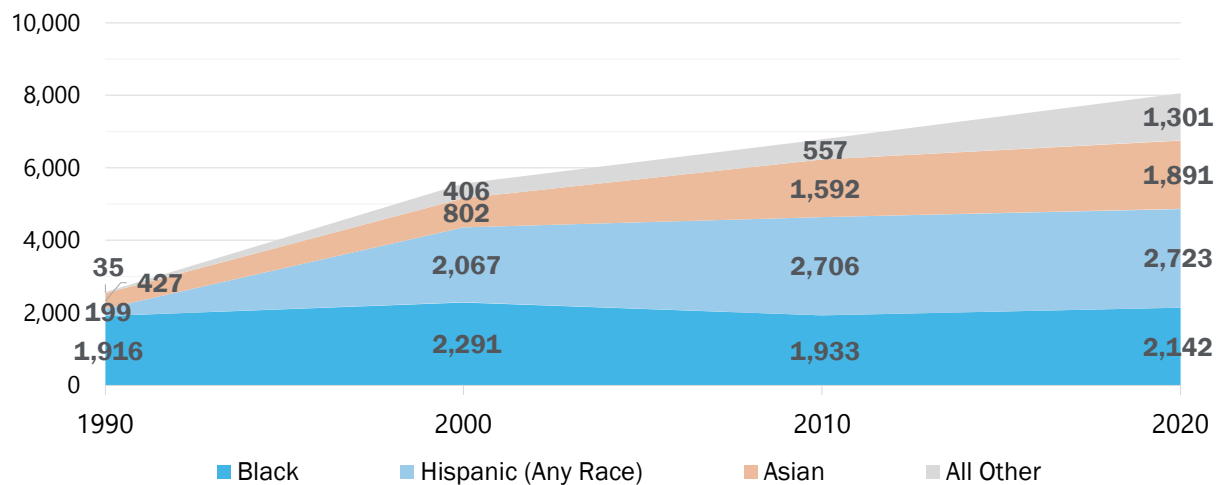
Note: "All Other" includes American Indian, other races, and multiracial. The Census changed their way of measuring race/ethnicity in the 2020 Census.

Source: US Census Bureau Decennial Census

15

Carrboro minority population by race/ethnicity

Changes in racial makeup by decade



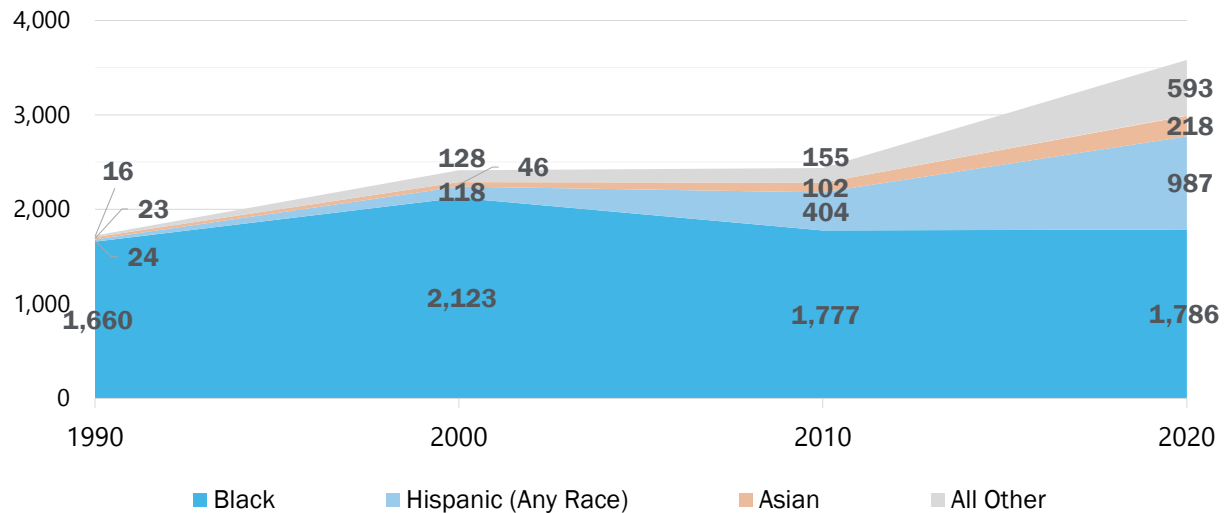
Note: "All Other" includes American Indian, other races, and multiracial. The Census changed their way of measuring race/ethnicity in the 2020 Census.

Source: US Census Bureau Decennial Census

16

Hillsborough minority population by race/ethnicity

Changes in racial makeup by decade



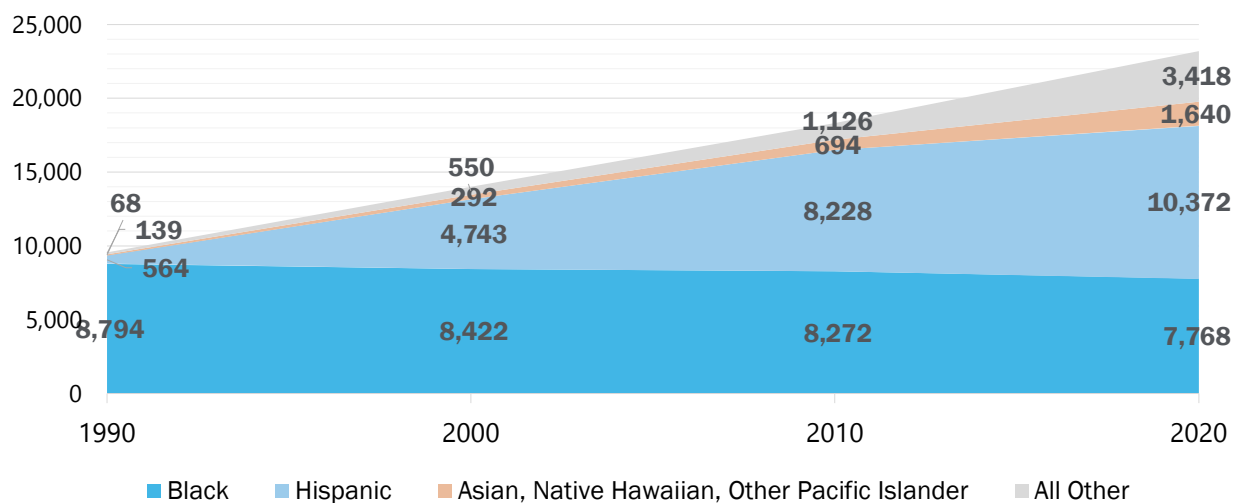
Note: "All Other" includes American Indian, other races, and multiracial. The Census changed their way of measuring race/ethnicity in the 2020 Census.

Source: US Census Bureau Decennial Census

17

Chatham County minority population by race/ethnicity

Changes in racial makeup by decade

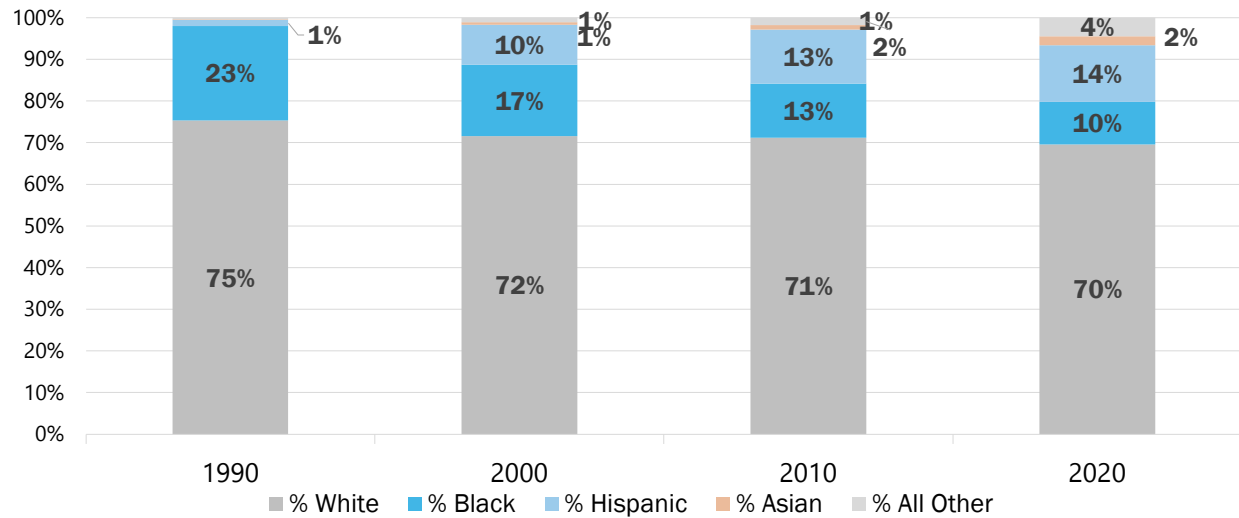


Note: "All Other" includes American Indian, other races, and multiracial. The Census changed their way of measuring race/ethnicity in the 2020 Census.

Source: US Census Bureau Decennial Census

18

Chatham County population by race/ethnicity



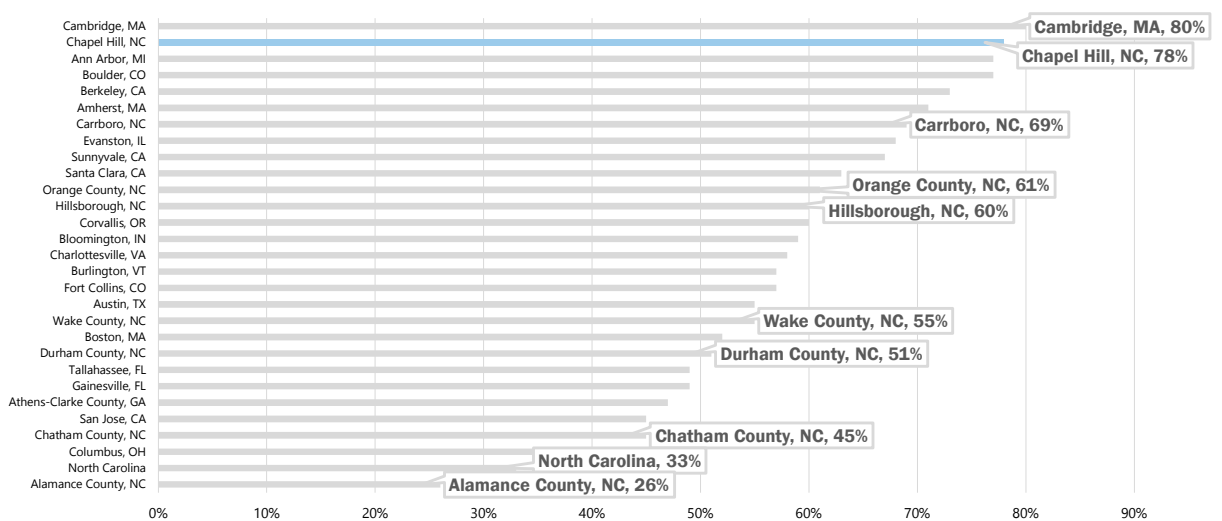
Note: "All Other" includes American Indian, other races, and multiracial. The Census changed their way of measuring race/ethnicity in the 2020 Census.

Source: US Census Bureau Decennial Census

19

Percent of residents with bachelor's degree or higher

Percent of residents 25+ with a bachelor's degree or higher, 2021

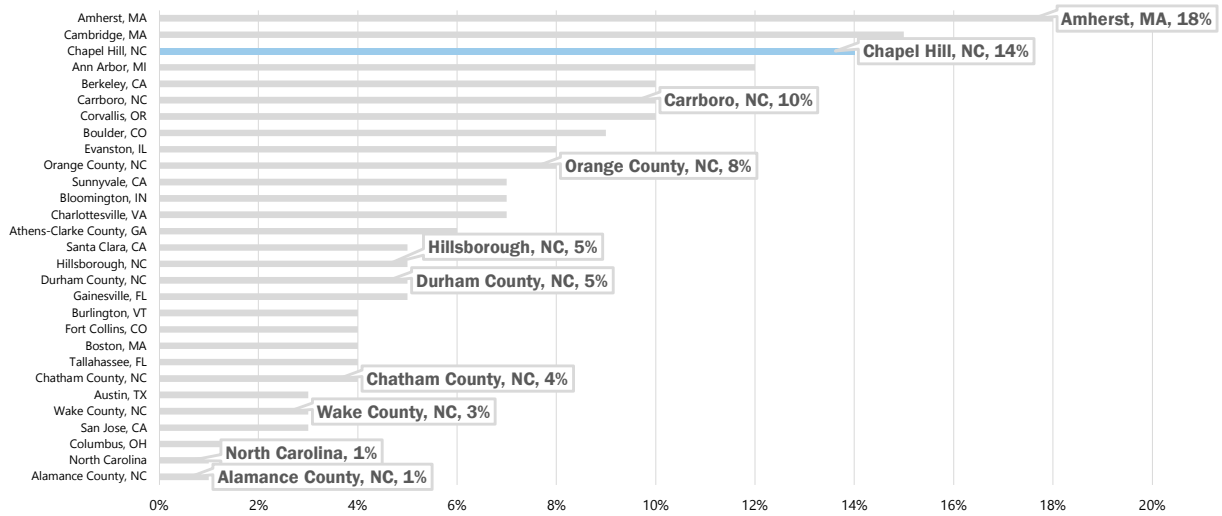


Source: American Community Survey (2017-2021 5-Year Estimates)

20

Percent of residents with a doctorate degree

Percent of residents 25+ with a doctorate degree, 2021



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

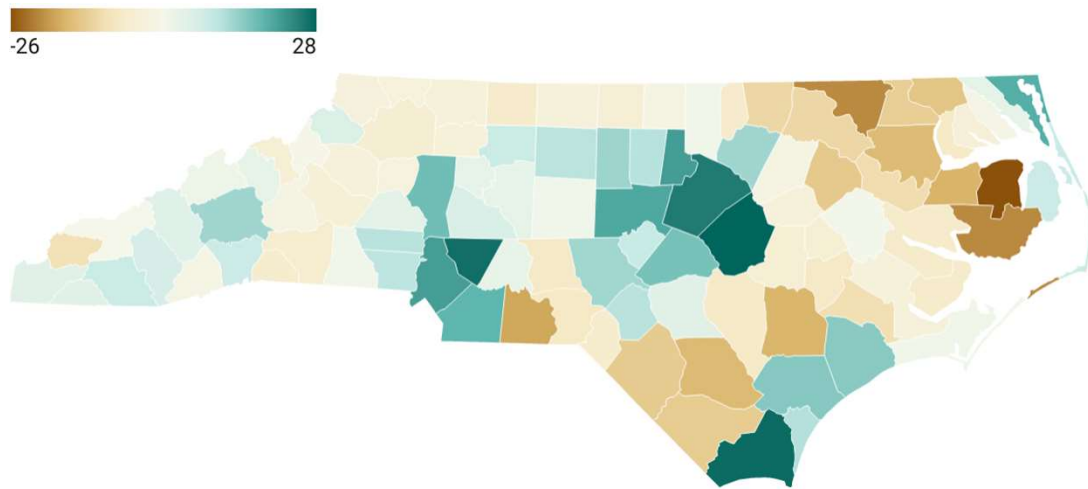
21

Population Growth & Change

22

Fastest Growth in Triangle, Charlotte, Wilmington

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



Source: US Census Bureau

23

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

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

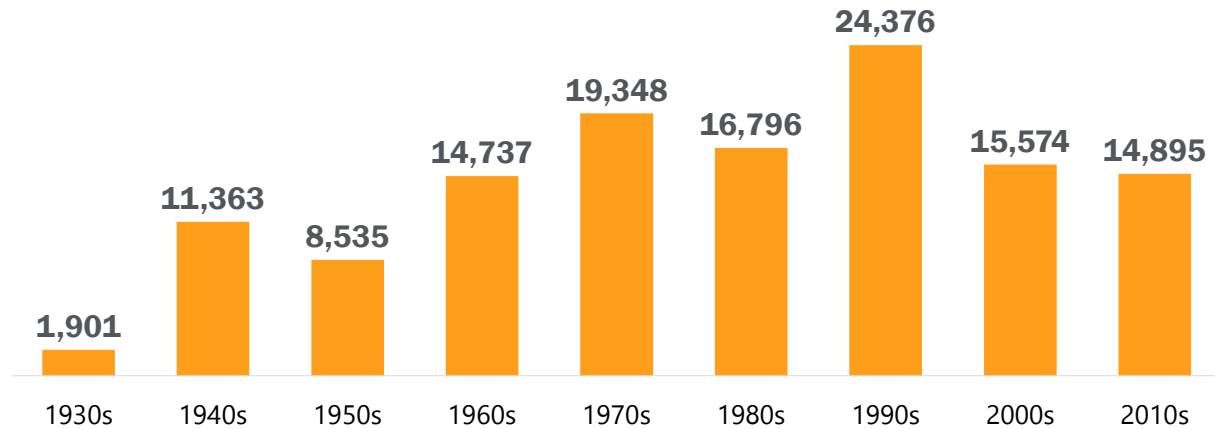
	2010	2020	Percent Growth 2010 to 2020	Annual Growth Rate
Orange County	133,801	148,696	11.1%	1.0%
Hillsborough	6,087	9,660	58.7%	4.3%
Carrboro	19,582	21,295	8.7%	0.8%
Chapel Hill	57,233	61,960	8.3%	0.7%
Chatham County	63,505	76,285	20.1%	1.7%
North Carolina	9,535,483	10,439,388	9.5%	0.8%

Source: US Census Bureau

24

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

Numeric population growth by decade, 1930-2020

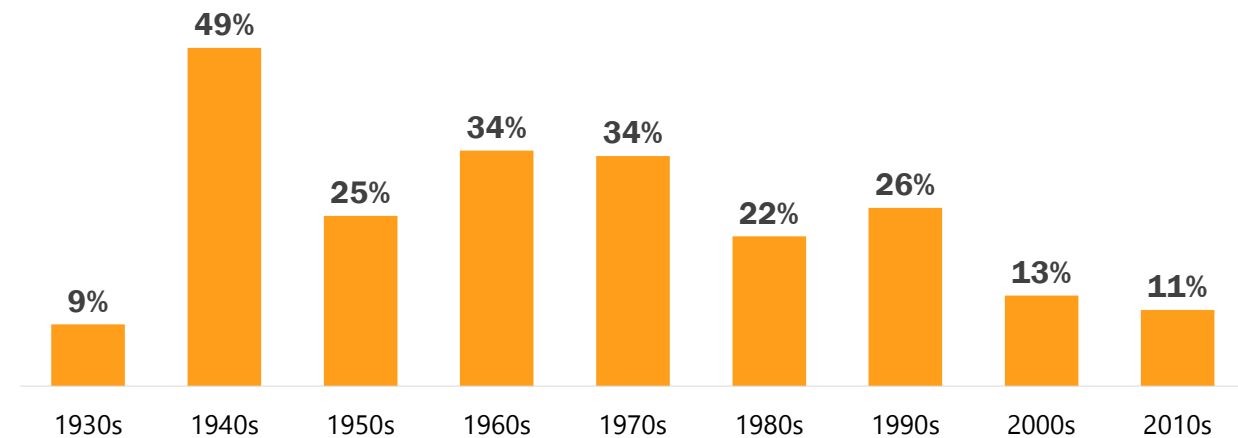


Source: US Census Bureau Decennial Census

25

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

Percent population increase by decade, 1930-2020

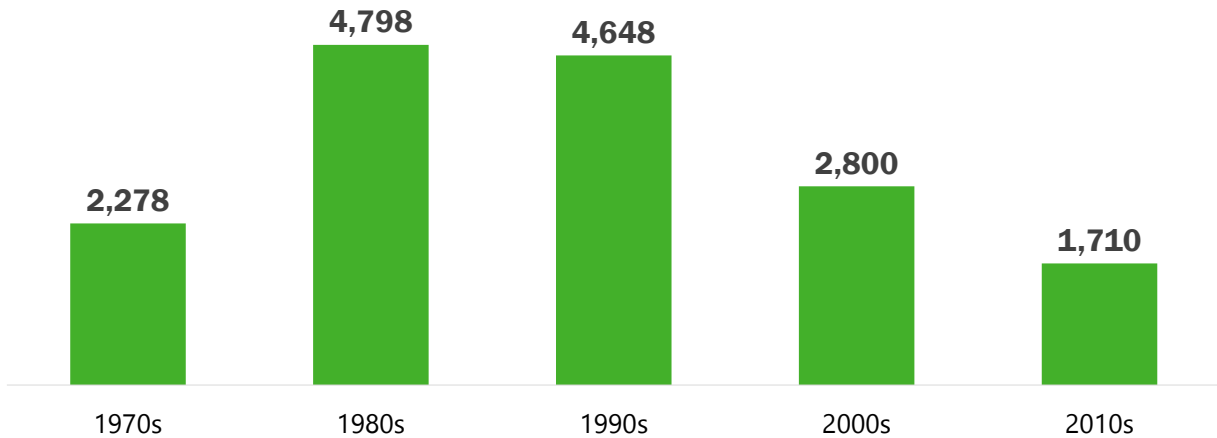


Source: US Census Bureau Decennial Census

26

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

Numeric population growth by decade, 1970-2020

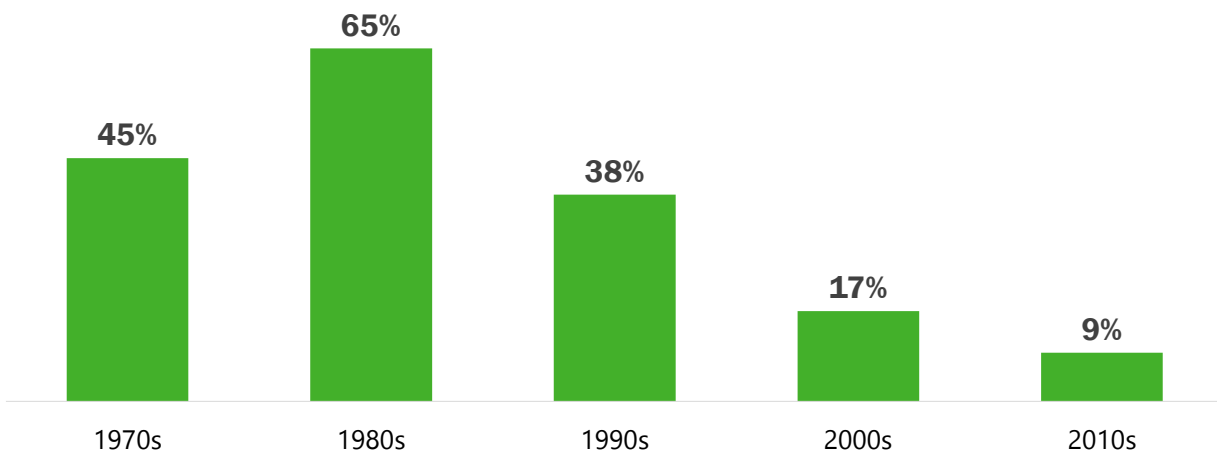


Source: US Census Bureau Decennial Census

27

2010s slowest growing decade for Carrboro since 1970s

Percent population increase by decade, 1970-2020

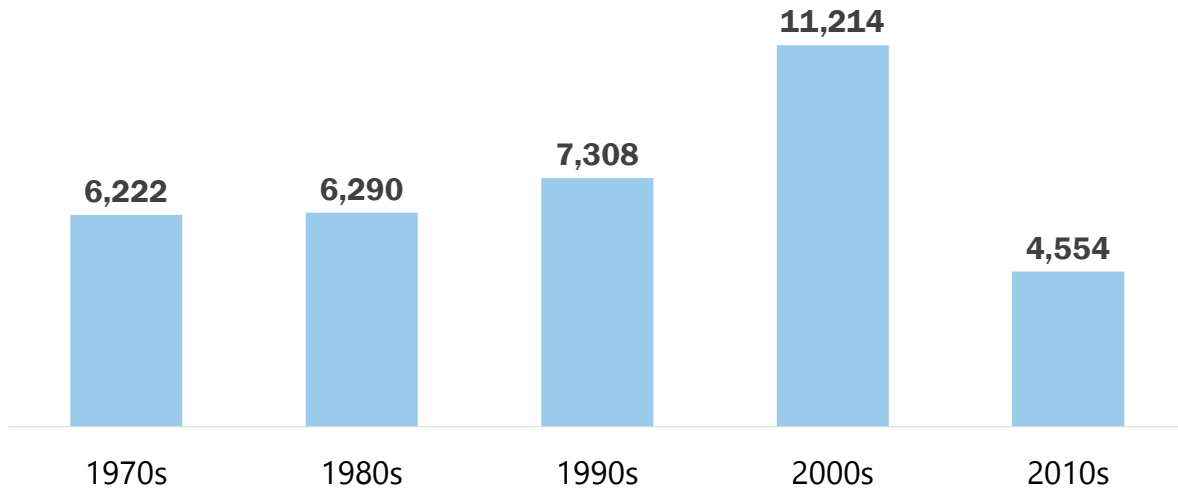


Source: US Census Bureau Decennial Census

28

2010s mark drop from Chapel Hill's 2000s peak*

Numeric population growth by decade, 1970-2020



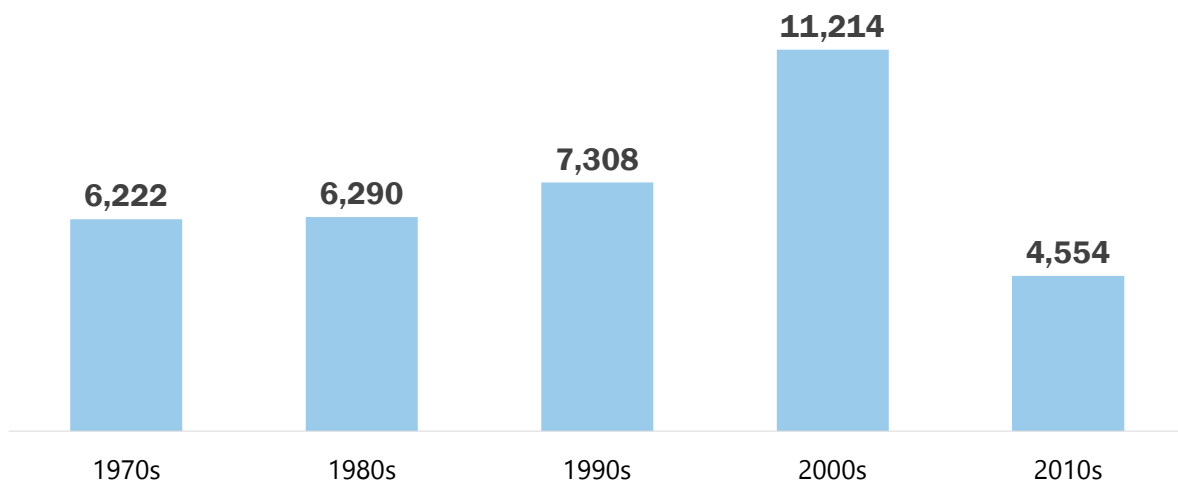
*42% of town growth in 2000s was due to annexation

Source: US Census Bureau Decennial Census

29

2010s mark drop from Chapel Hill's 2000s peak*

Numeric population growth by decade, 1970-2020



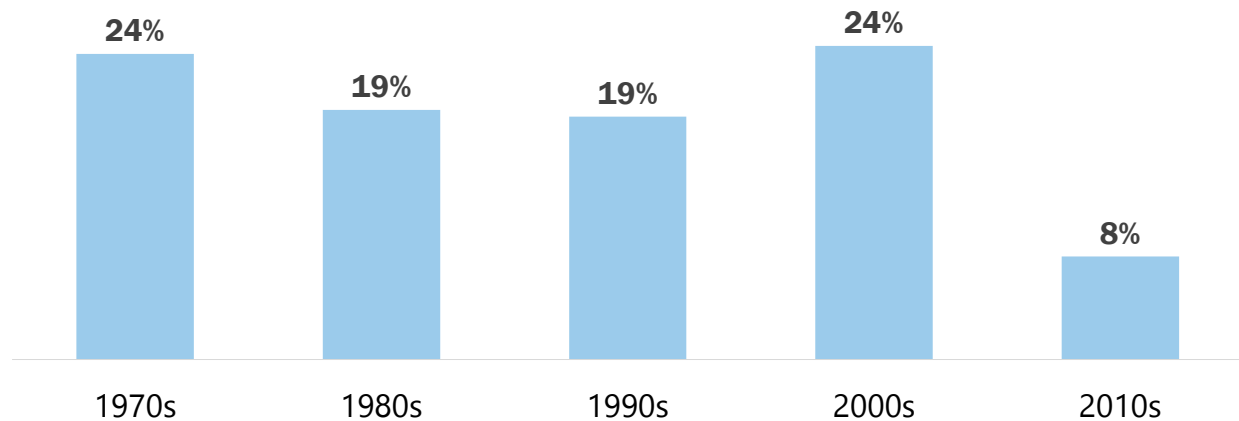
*42% of town growth in 2000s was due to annexation

Source: US Census Bureau Decennial Census

30

2010s slowest growing decade for Chapel Hill since 1970s

Percent population increase by decade, 1970-2020



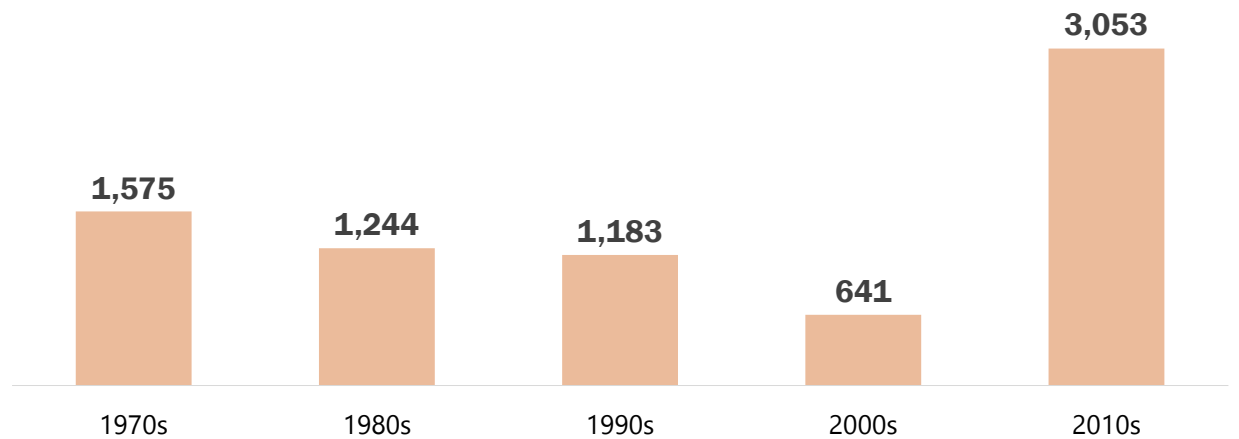
*42% of town growth in 2000s was due to annexation

Source: US Census Bureau Decennial Census

31

Hillsborough's 2010s population growth largest since 1970s

Numeric population growth by decade, 1970-2020

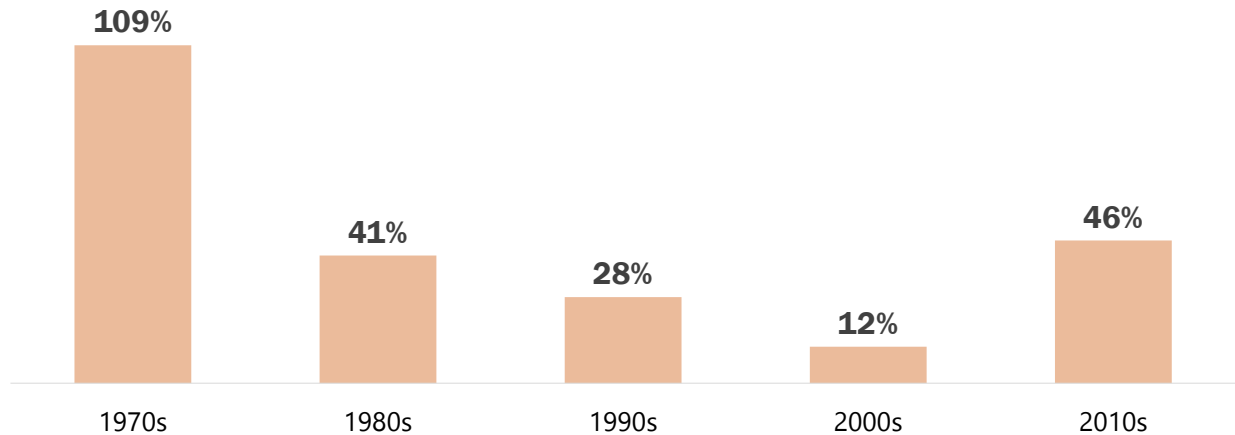


Source: US Census Bureau Decennial Census

32

2010s second fastest growing decade for Hillsborough since 1970s

Percent population increase by decade, 1970-2020

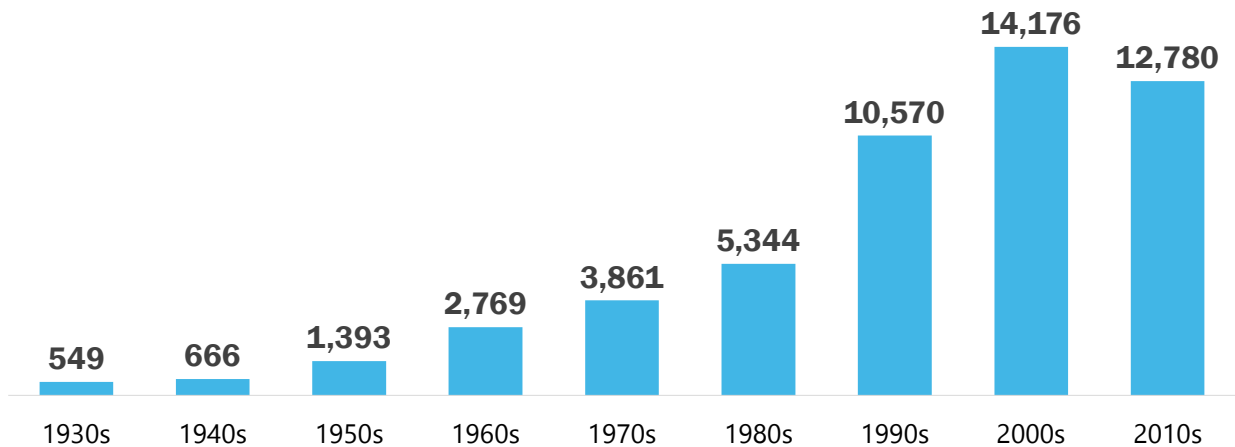


Source: US Census Bureau Decennial Census

33

Chatham County decennial population growth second largest on record

Numeric population growth by decade, 1930-2020

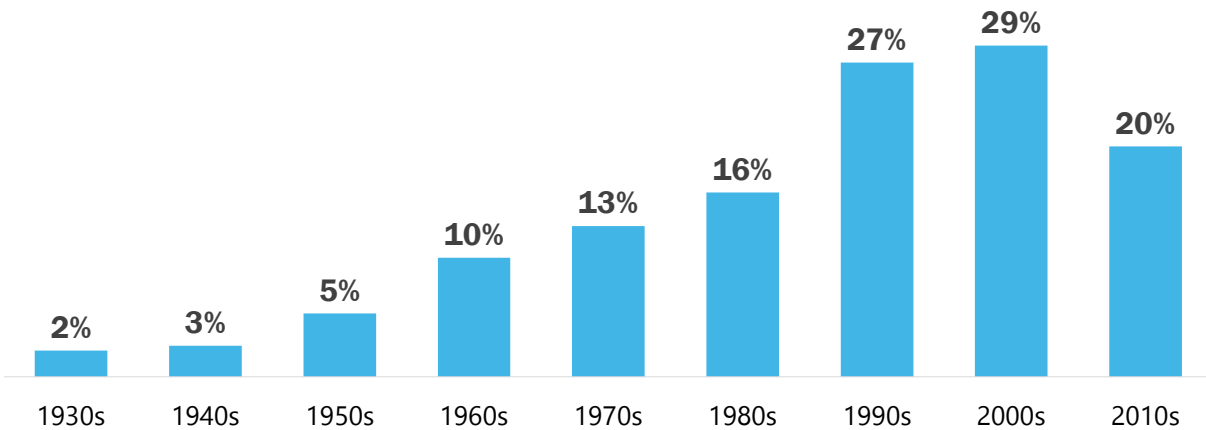


Source: US Census Bureau Decennial Census

34

2010s third fastest decade of growth for Chatham County

Percent population increase by decade, 1930-2020

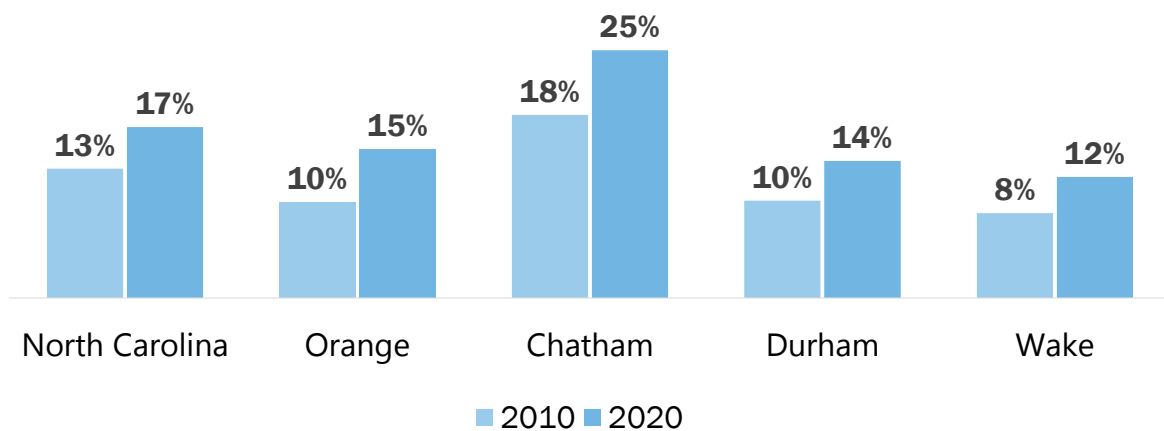


Source: US Census Bureau Decennial Census

35

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

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

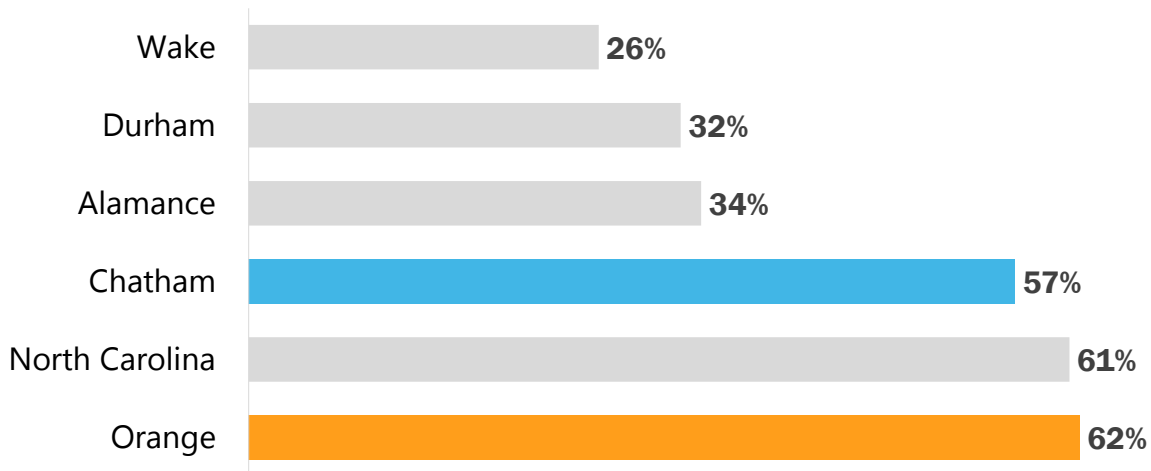


Source: US Census Bureau Population Estimates

36

Increases in 65+ population drove NC, county growth

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

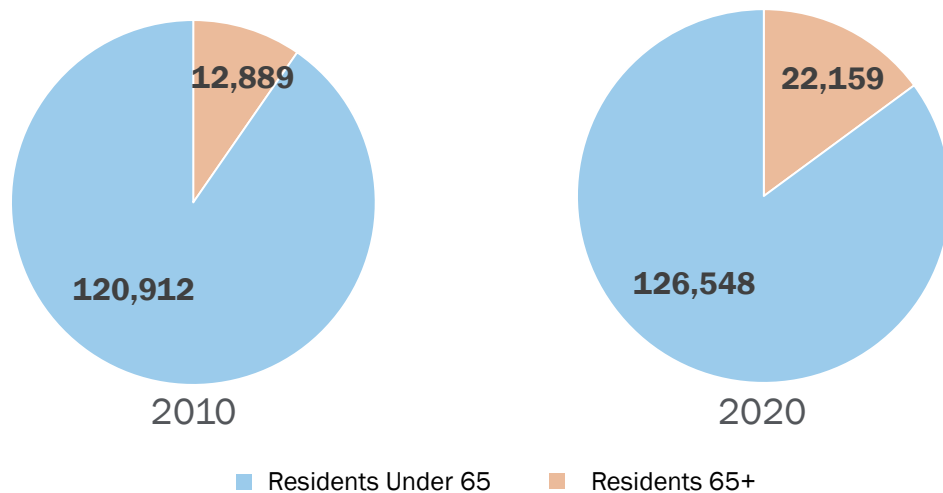


Source: US Census Bureau Population Estimates

37

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

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

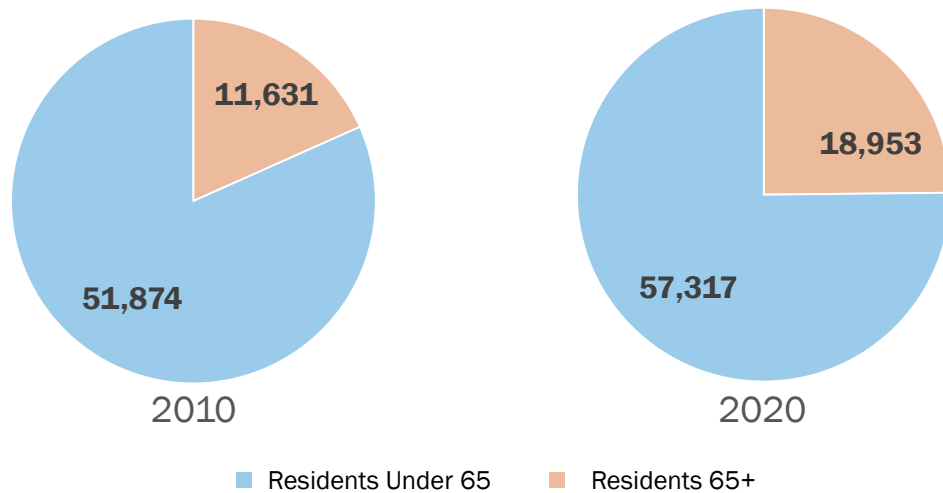


Source: US Census Bureau Population Estimates

38

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

Chatham County has 7,300 more seniors in 2020 than 2010, now 25% of the county population

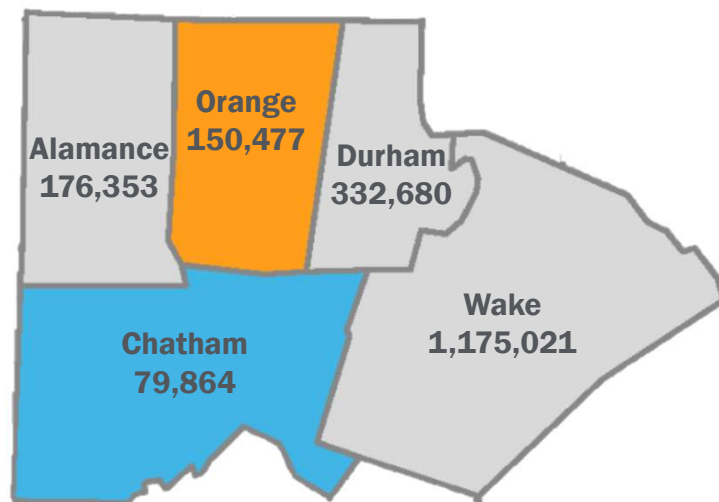


Source: US Census Bureau Population Estimates

39

2022 county population totals

North Carolina population: 10,698,973

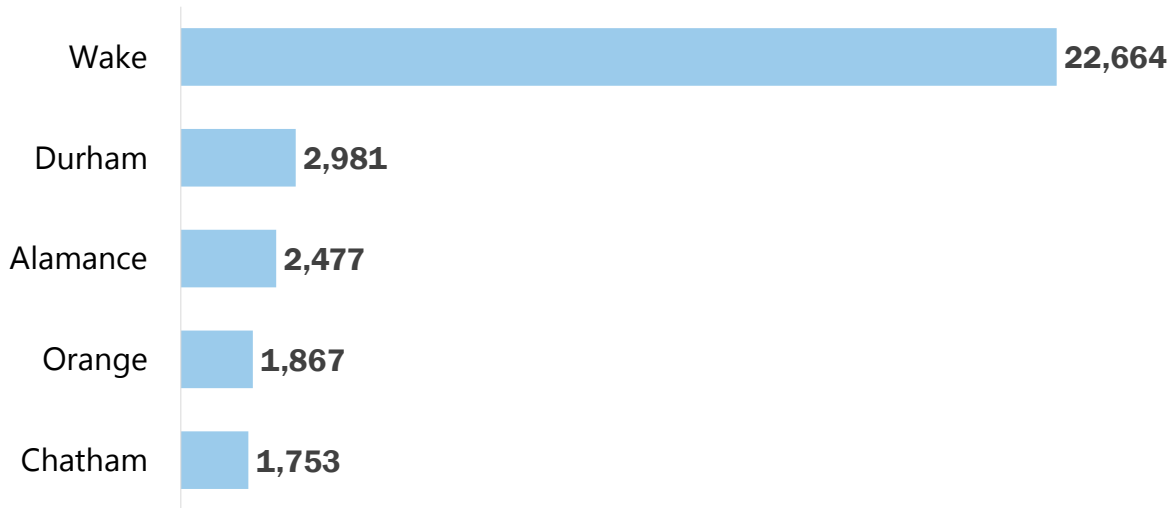


Source: US Census Bureau Decennial Census

40

County numeric population change 2021-2022

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

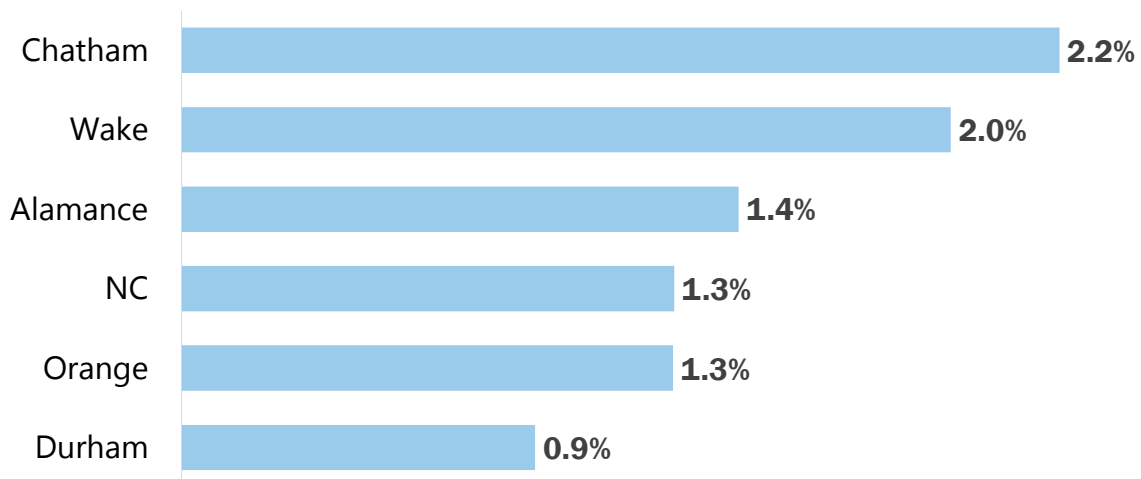


Source: US Census Bureau Decennial Census

41

Chatham grows fastest among peer counties in 2022

Percentage population growth from 2021 to 2022

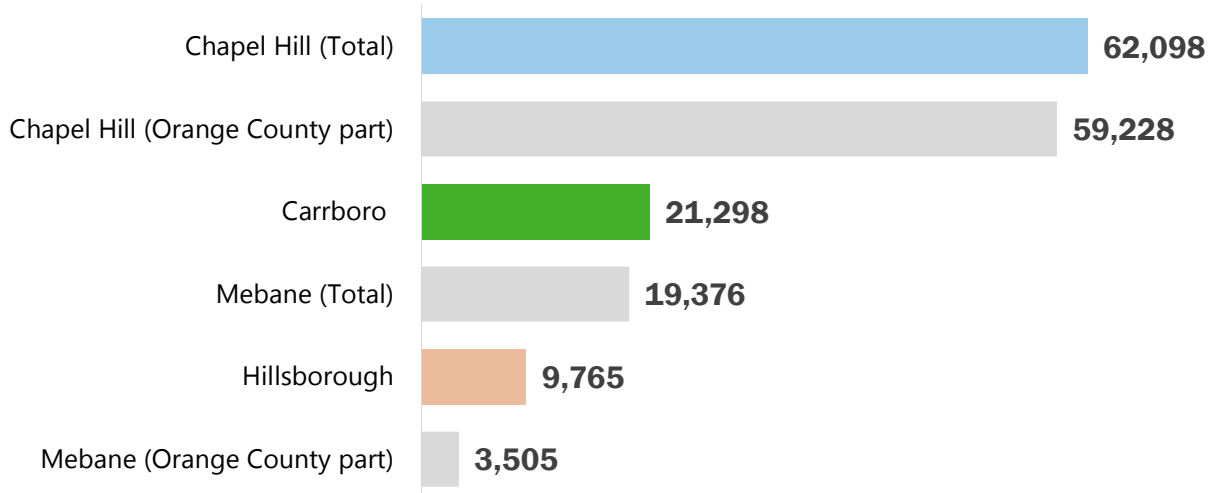


Source: US Census Bureau Decennial Census

42

2022 municipal populations

Population of Orange County municipalities, 2022

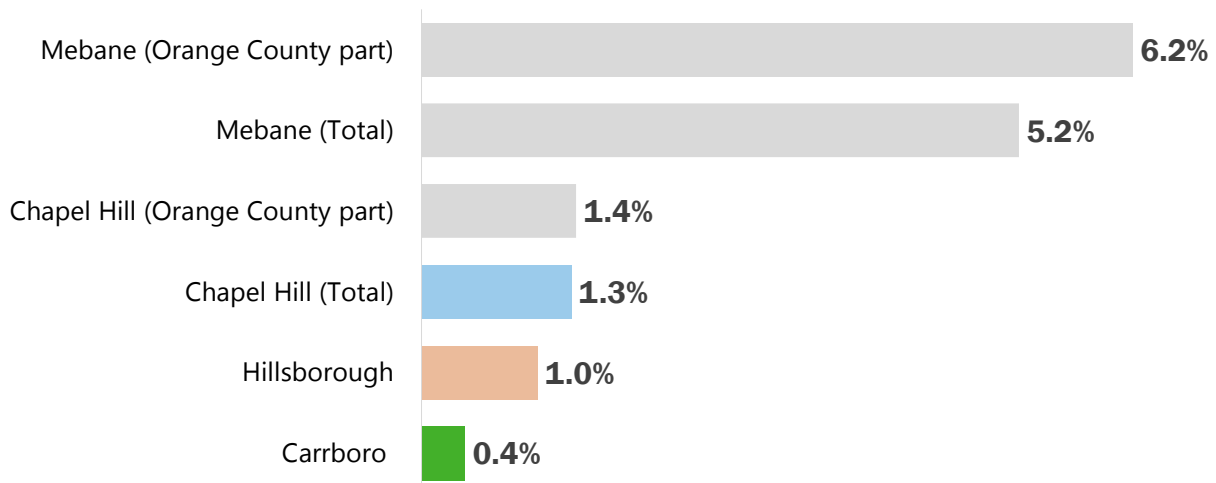


Source: Decennial Census and Census Population Estimates

43

Municipal population change

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

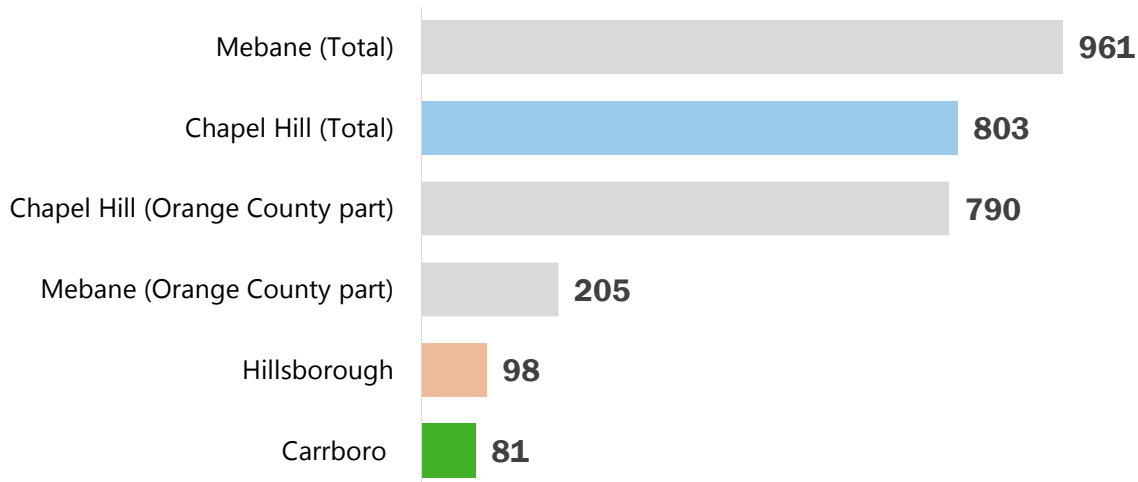


Source: Decennial Census and Census Population Estimates

44

Municipal population change

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

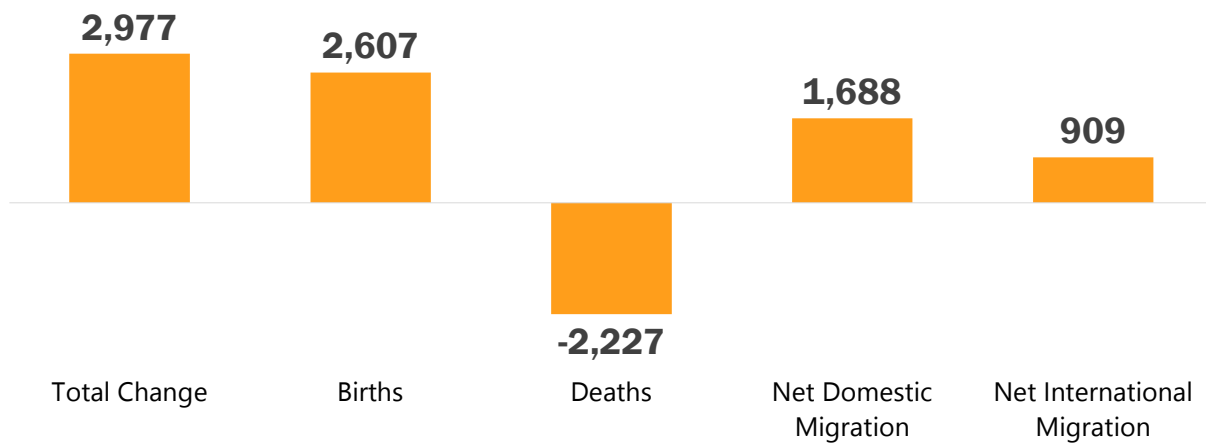


Source: Decennial Census and Census Population Estimates

45

Orange County components of population change

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

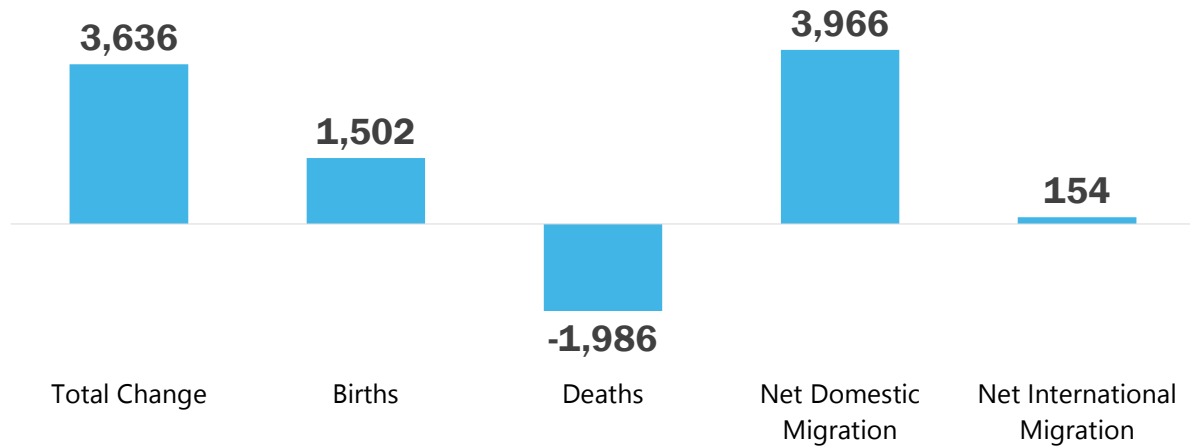


Source: US Census Bureau Population Estimates

46

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

47

Population Projections & Population Density

48

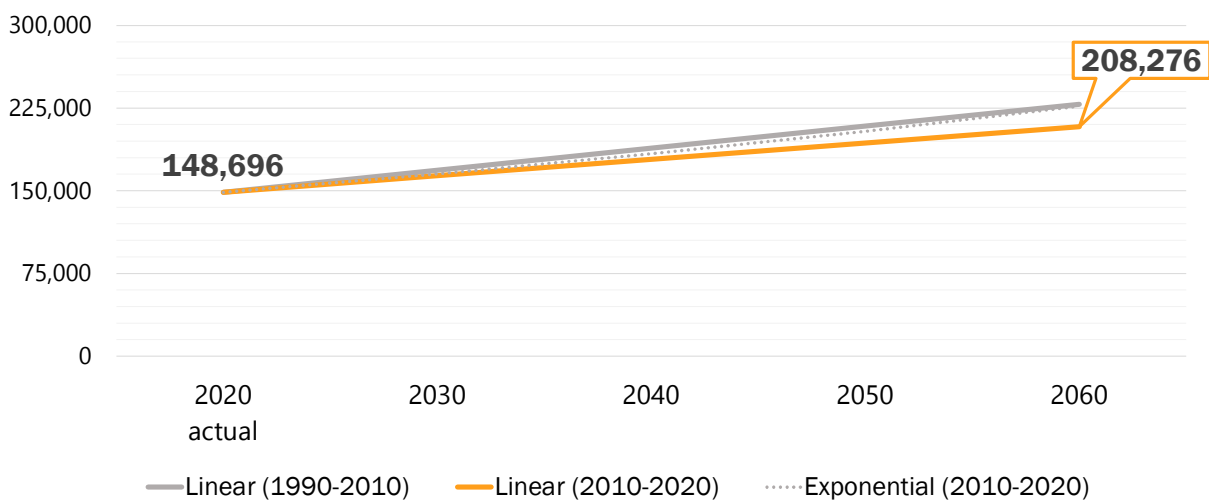
Three models for projecting growth

	Exponential (2010-2020)	Linear (1990-2010)	Linear (2010-2020)
Orange County	1.1%	1,998 people per year	1,490 people per year
Chatham County	1.8%	1,237 people per year	1,278 people per year
Carrboro	0.8%	372 people per year	171 people per year
Chapel Hill	0.8%	926 people per year	473 people per year
Hillsborough	4.6%	91 people per year	357 people per year

Source: Decennial Census

49

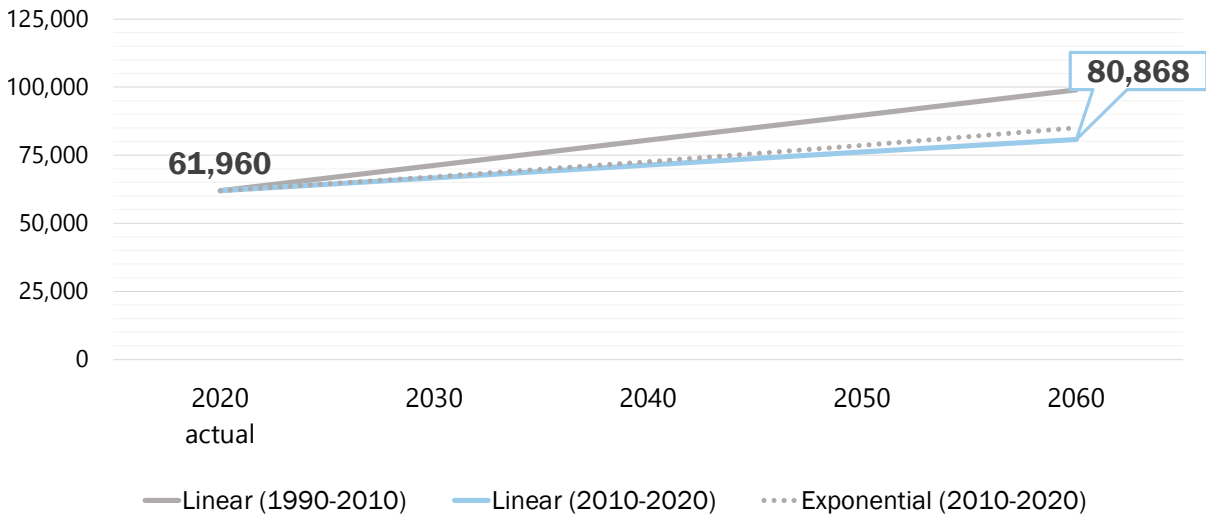
Orange County population projections



Source: Decennial Census; projections by Carolina Demography

50

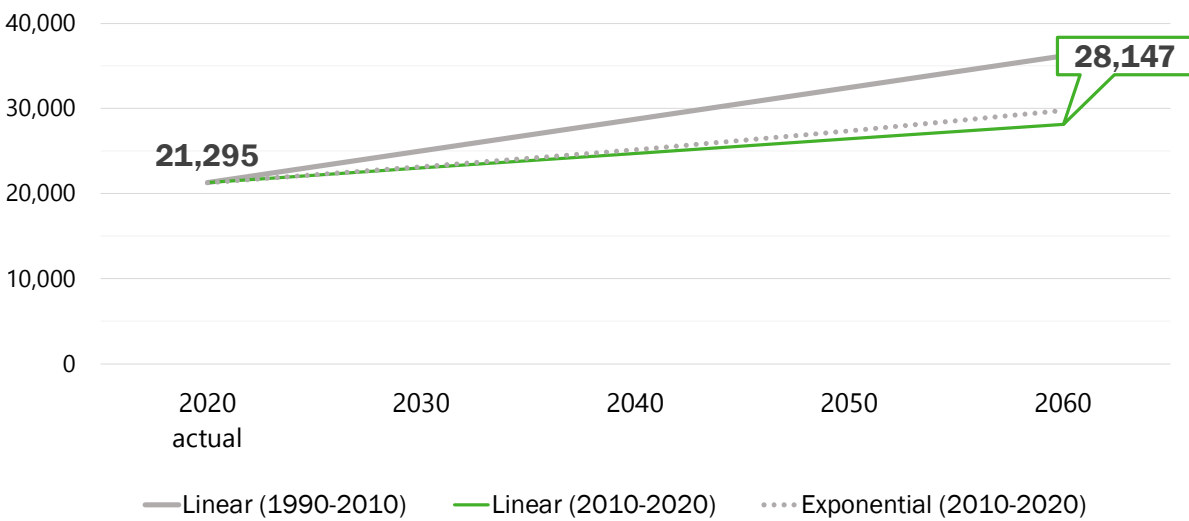
Chapel Hill population projections



Source: Decennial Census; projections by Carolina Demography

51

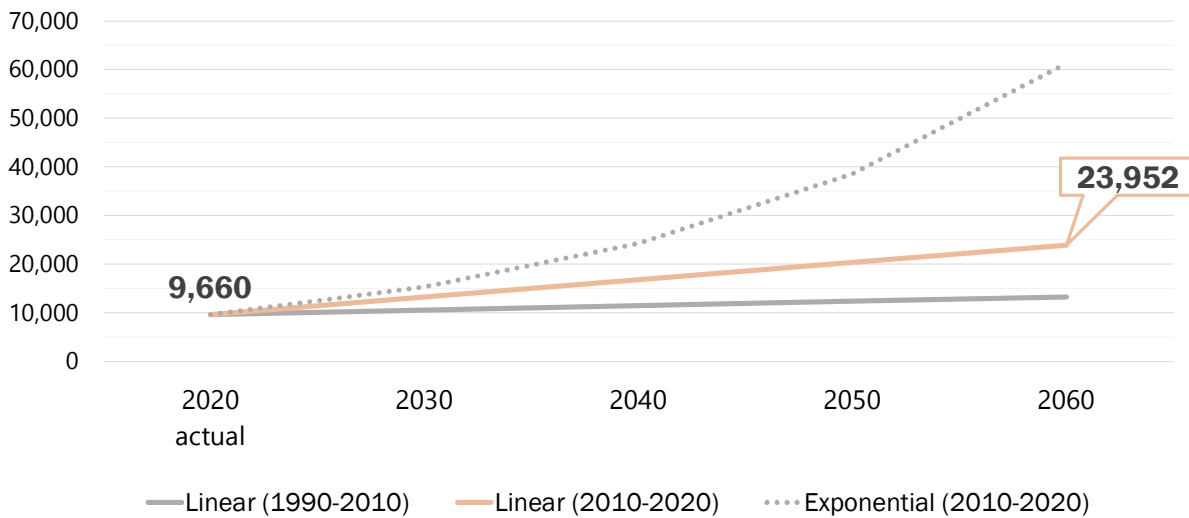
Carrboro population projections



Source: Decennial Census; projections by Carolina Demography

52

Hillsborough population projections

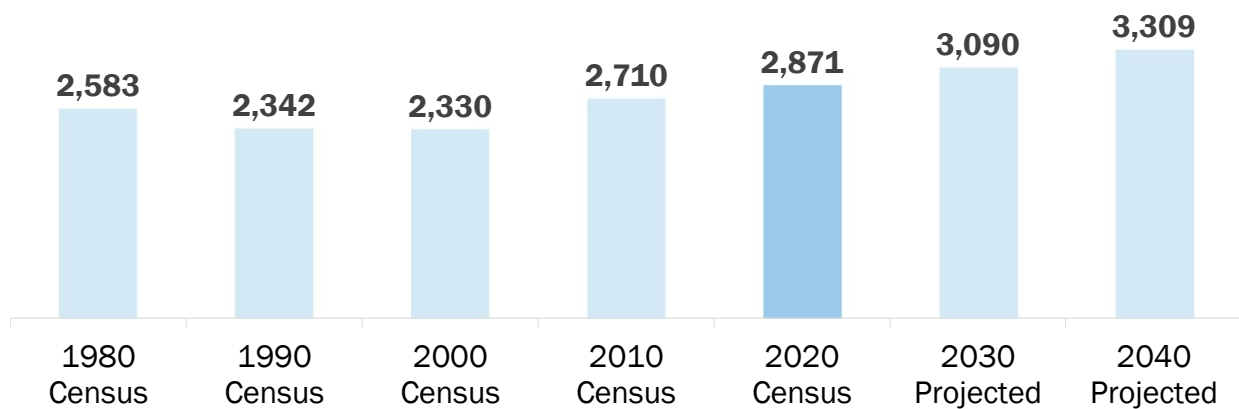


Source: Decennial Census; projections by Carolina Demography

53

Chapel Hill projected population density

Population per square mile, projecting with linear 2010-2020

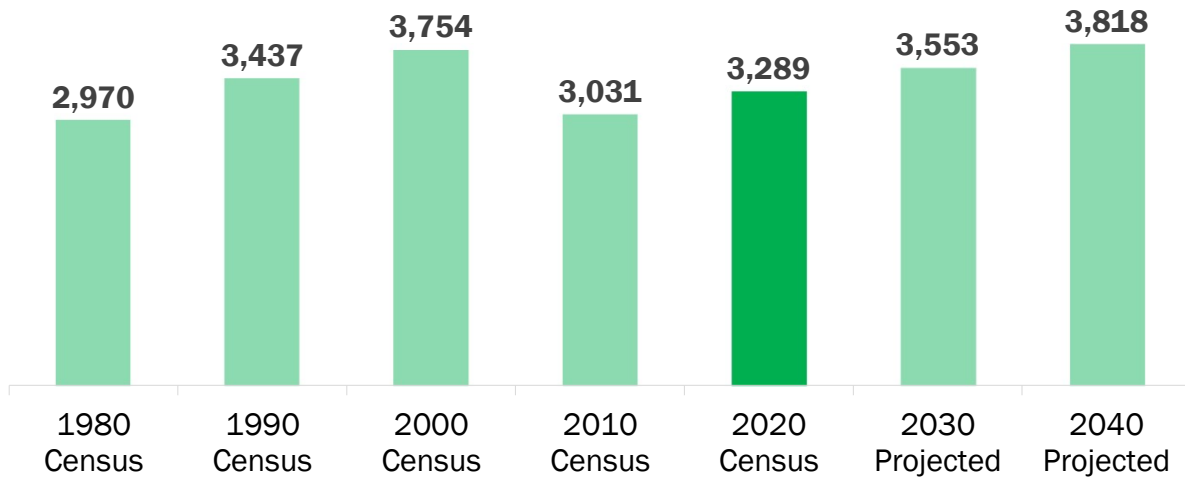


Source: Decennial Census; projections by Carolina Demography

54

Carrboro projected population density

Population per square mile, projecting with linear 2010-2020

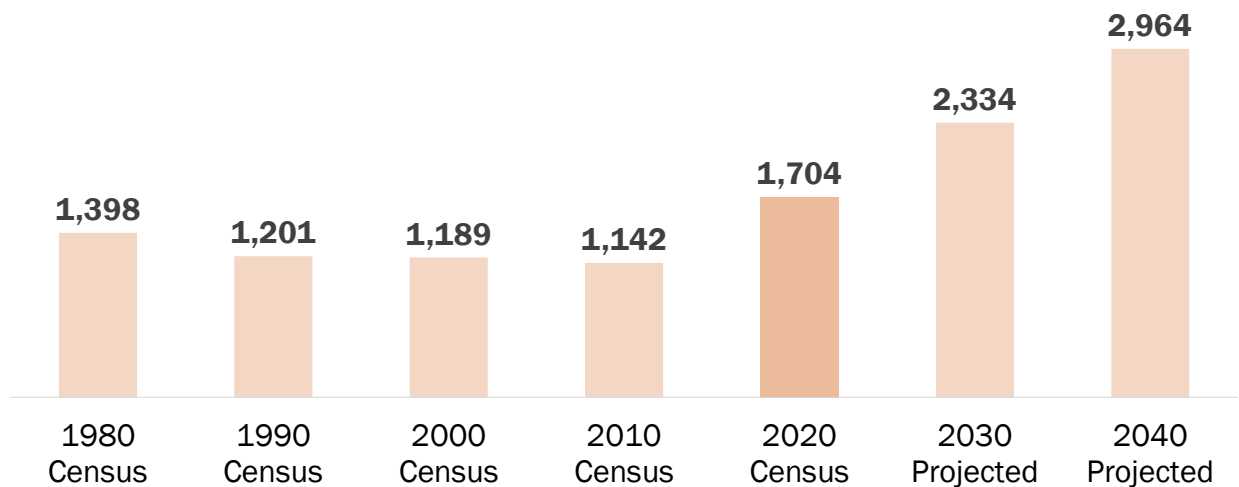


Source: Decennial Census; projections by Carolina Demography

55

Hillsborough projected population density

Population per square mile, projecting with linear 2010-2020

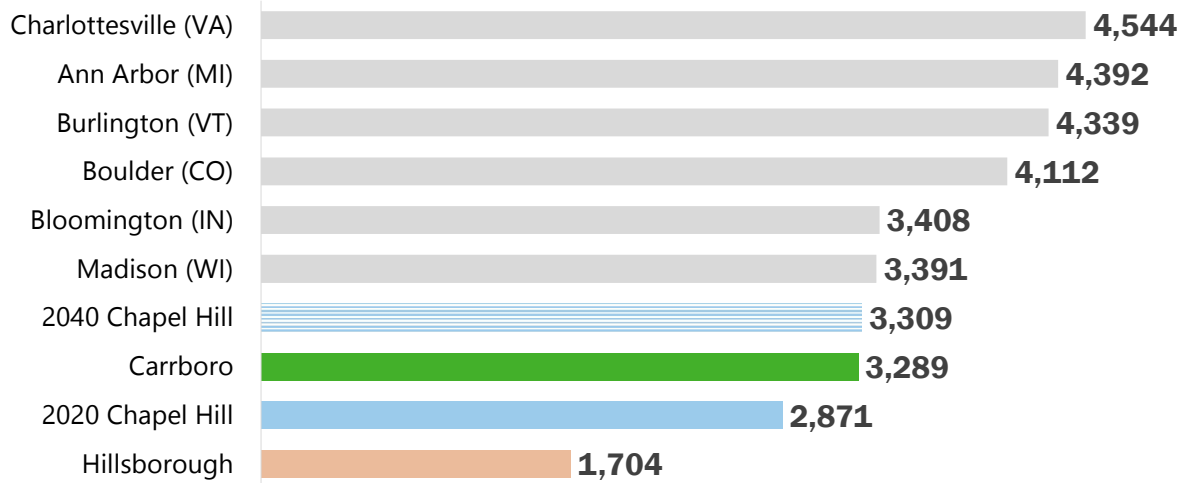


Source: Decennial Census; projections by Carolina Demography

56

Population per square mile, 2020

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



Source: Decennial Census; projections by Carolina Demography

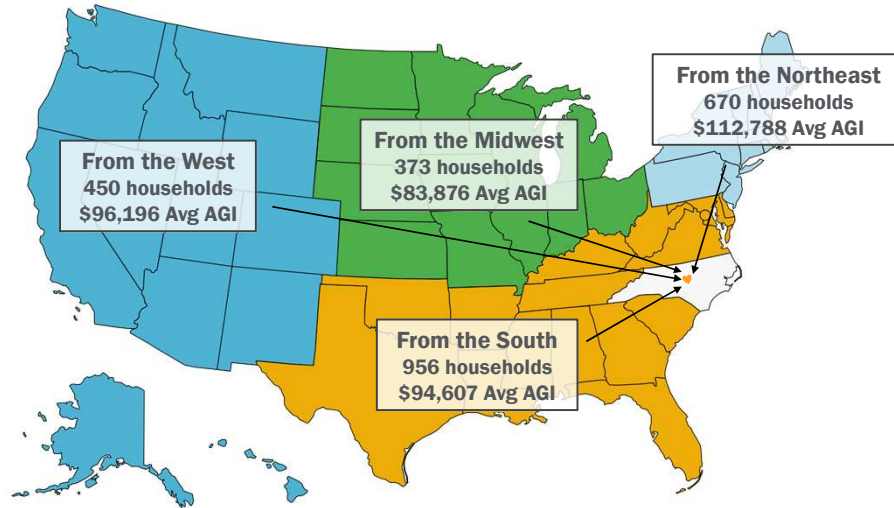
57

Migration

58

Domestic migration into Orange County

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

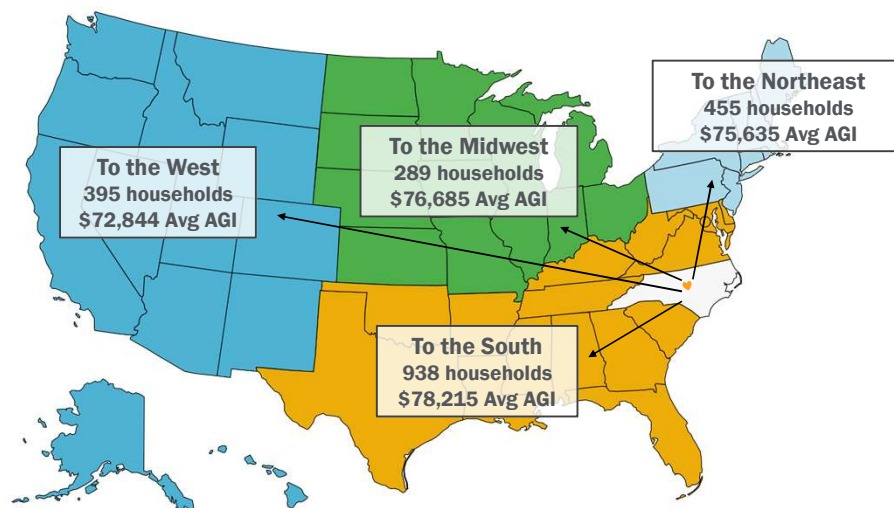


Source: IRS

59

Domestic migration out of Orange County

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

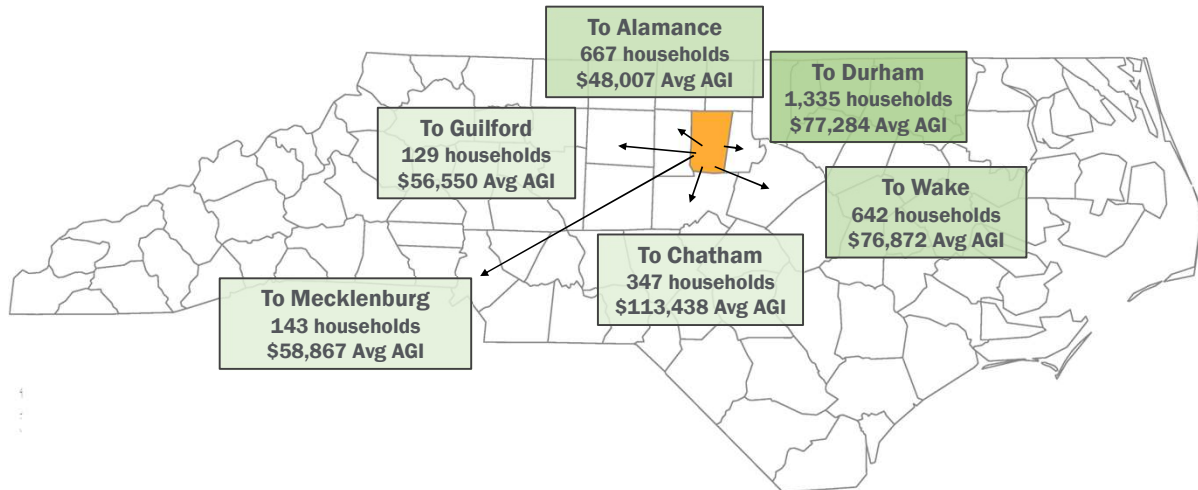


Source: IRS

60

Migration out of Orange County

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

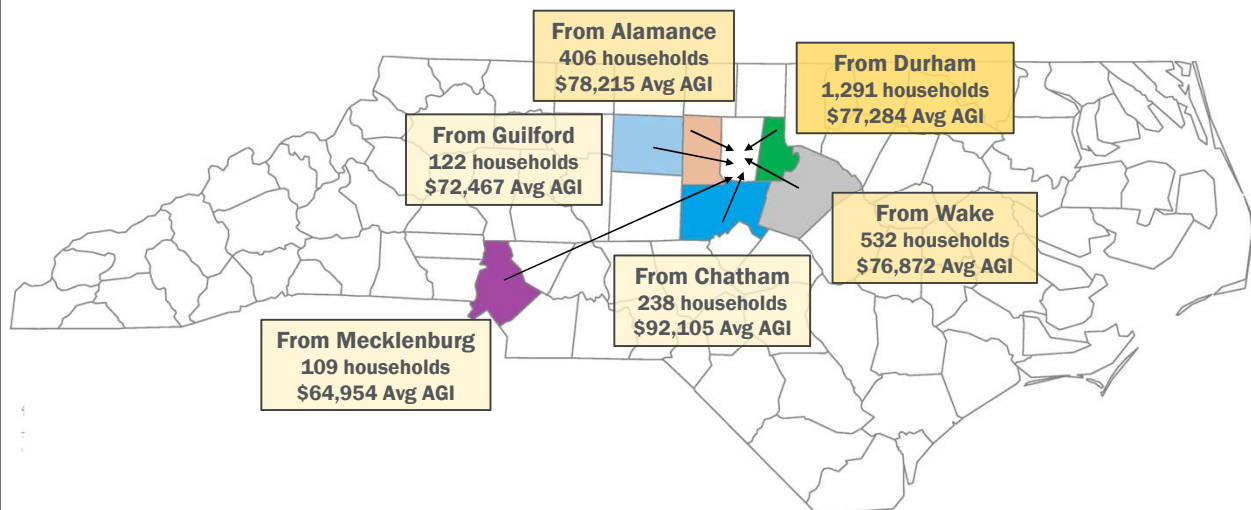


Source: IRS

61

Migration into Orange County

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



Source: IRS

62

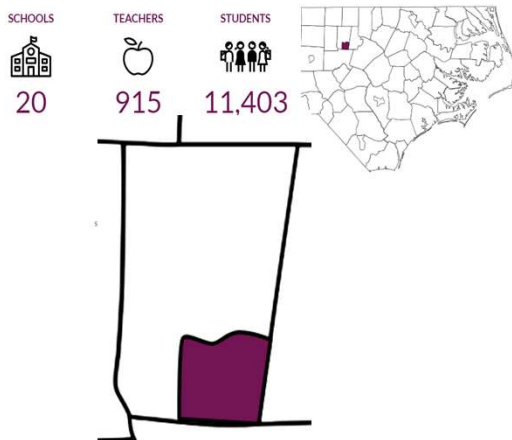
Public Education:

- Enrollment
- Home & Private Schooling
- Funding

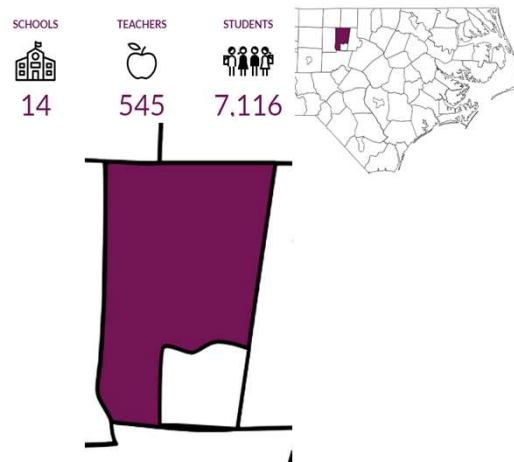
63

Two Orange County school districts

Chapel Hill-Carrboro City Schools



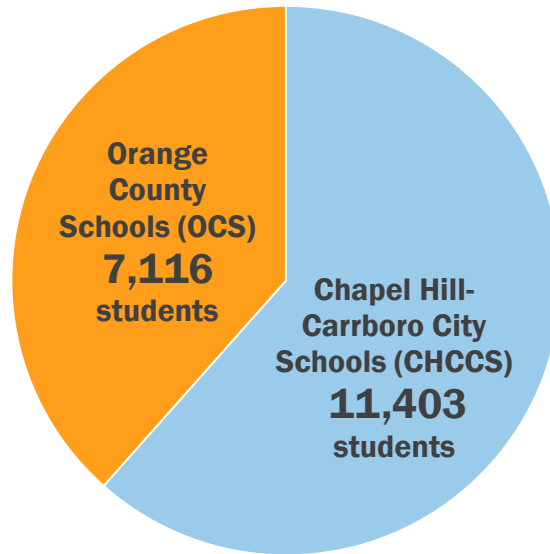
Orange County Schools



Source: EDNC.org

64

Orange County school districts' enrollment

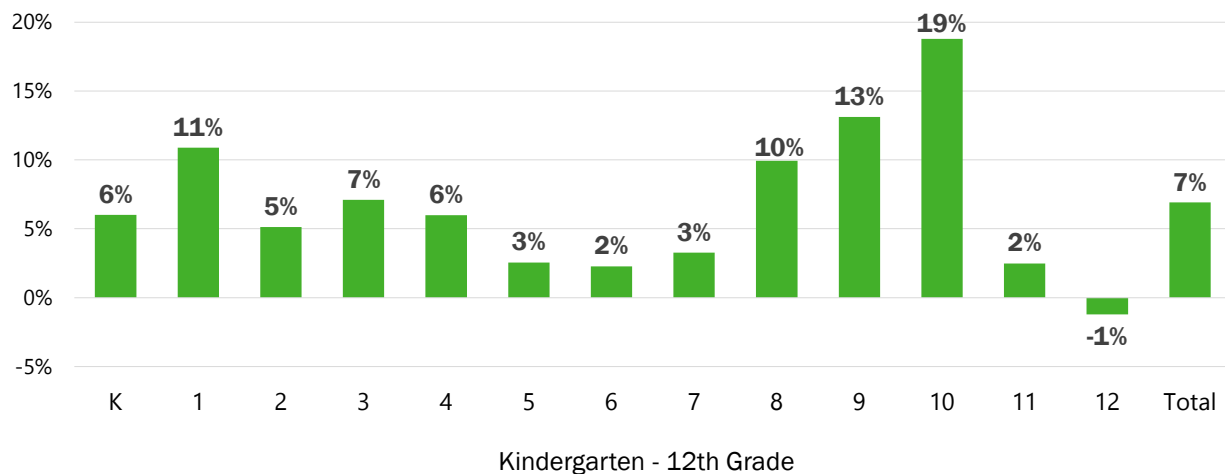


Source: NC Department of Public Instruction

65

North Carolina public school enrollment change between AY2020 and AY2023

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

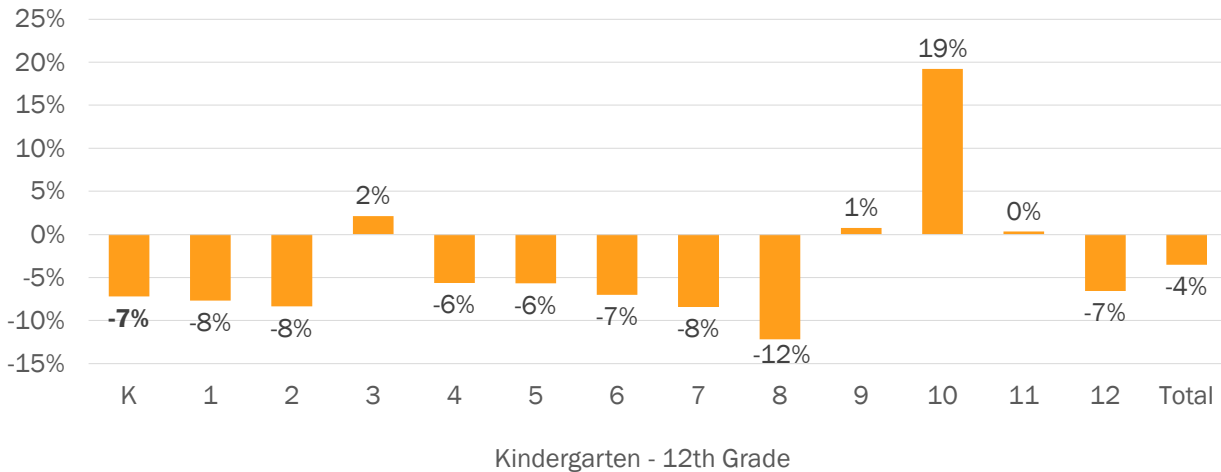


Source: NC Department of Public Instruction

66

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

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

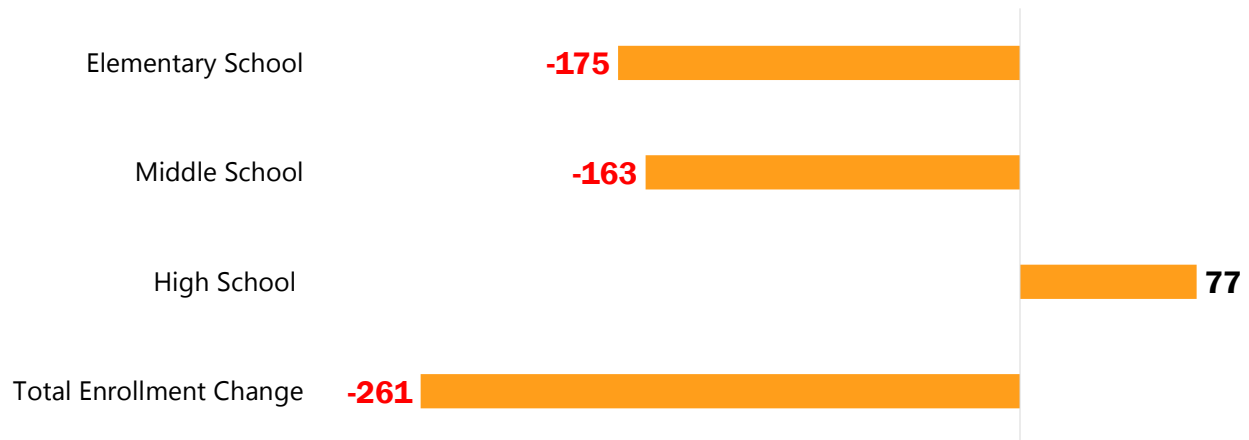


Source: NC Department of Public Instruction

67

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

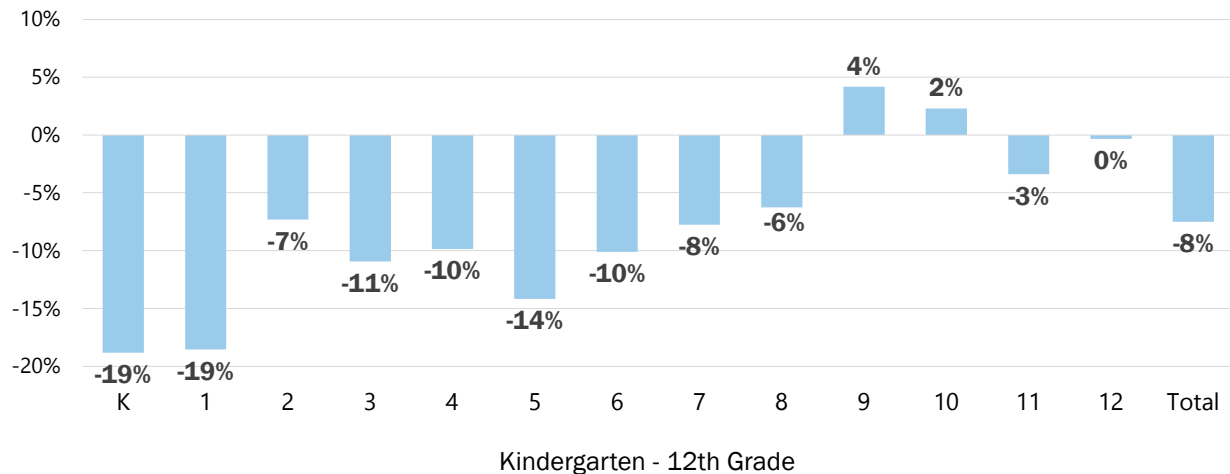


Source: NC Department of Public Instruction

68

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

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

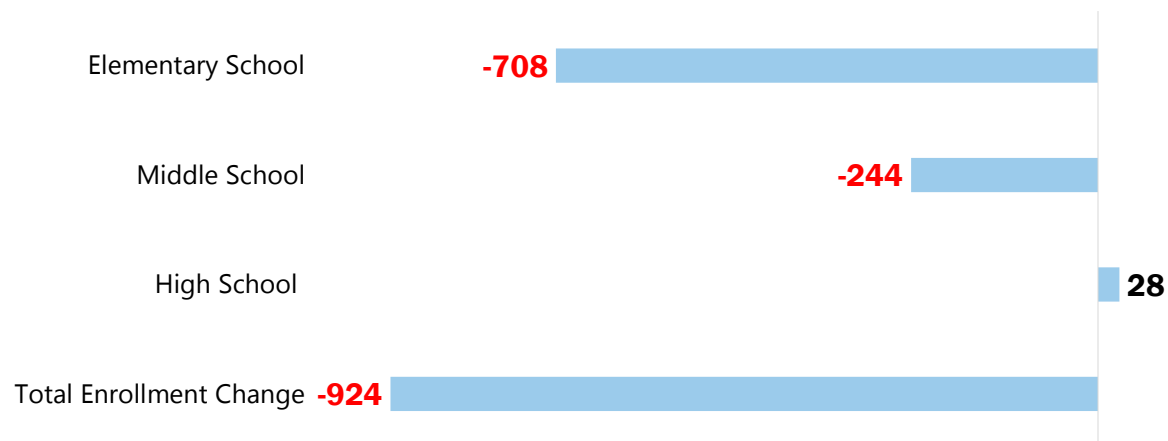


Source: NC Department of Public Instruction

69

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

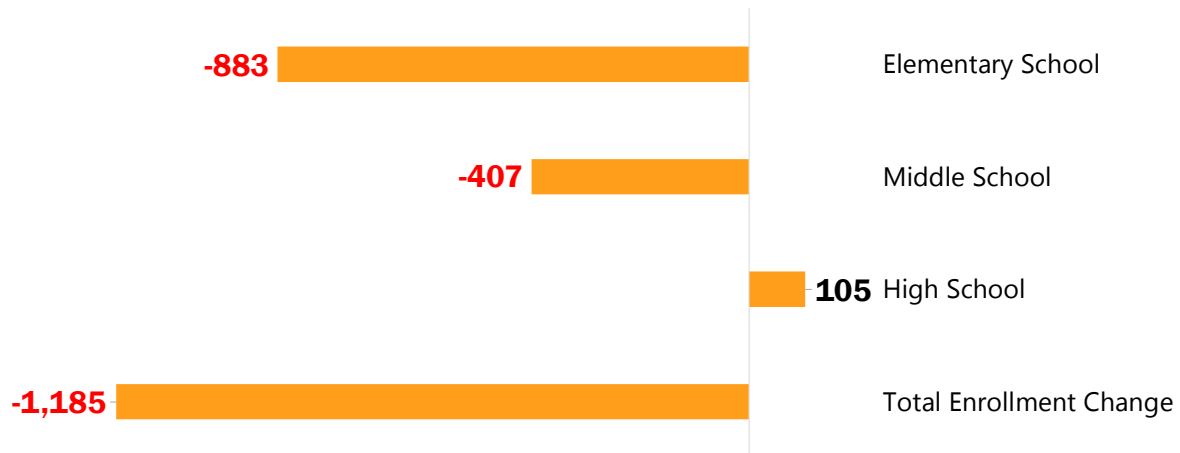


Source: NC Department of Public Instruction

70

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

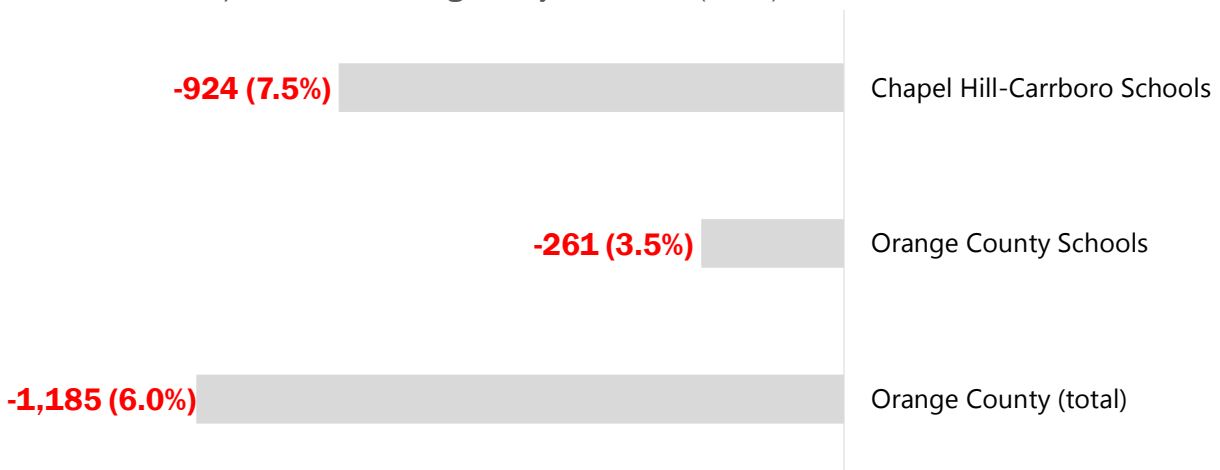


Source: NC Department of Public Instruction

71

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

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

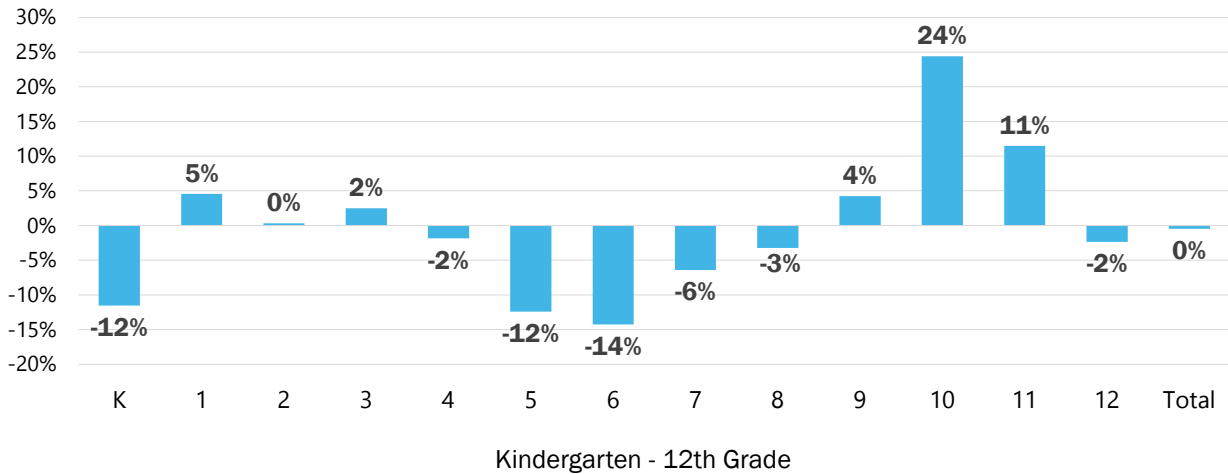


Source: NC Department of Public Instruction

72

Chatham County Schools enrollment change since 2020

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

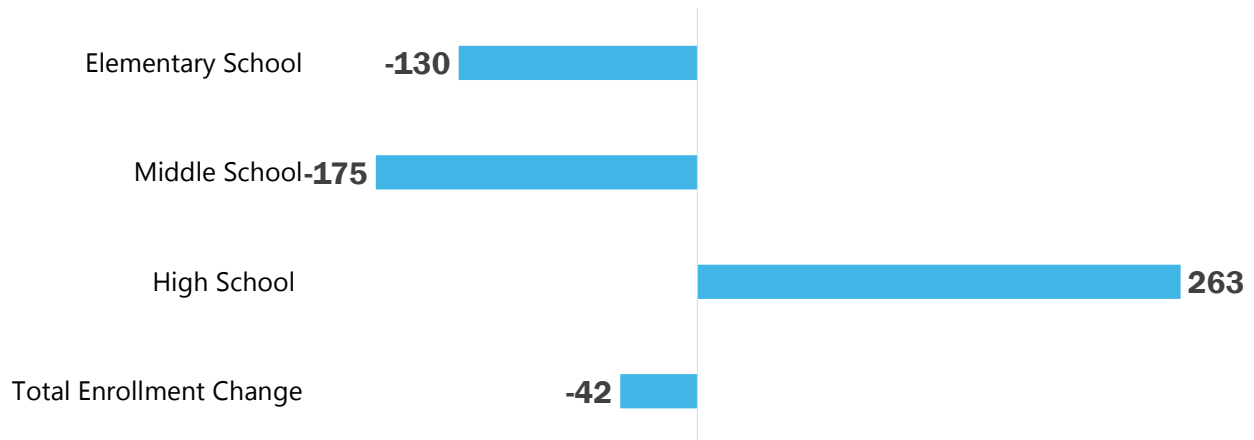


Source: NC Department of Public Instruction

73

Chatham County Schools headcount (ADM) declines by 42 Students (-0.5%) From AY2020 to AY2023

Student increase/decrease in Average Daily Members (ADM) between AY2020 and AY2023

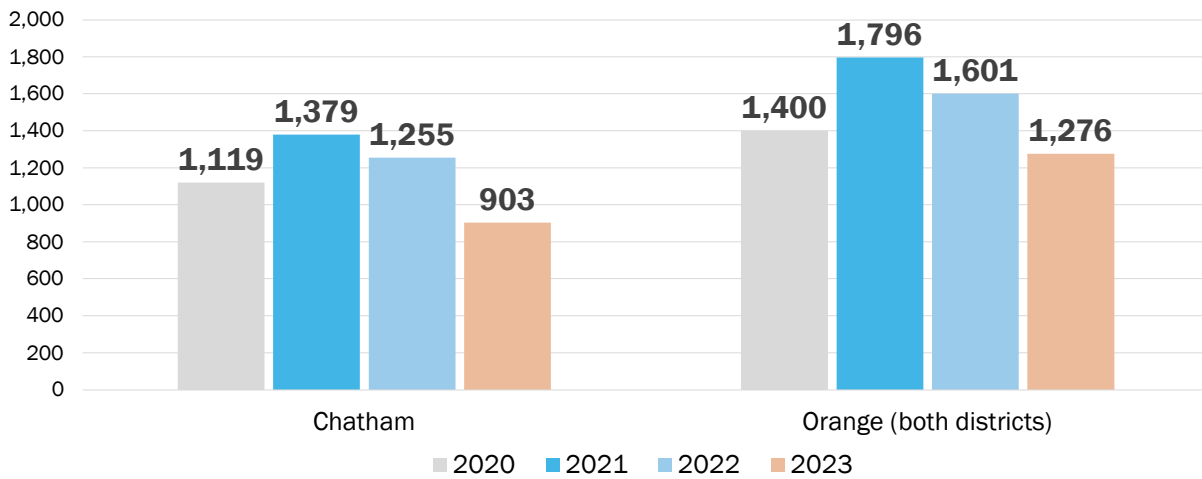


Source: NC Department of Public Instruction

74

Home School enrollments by county

Number of students enrolled in home school, AY2020 – AY2023

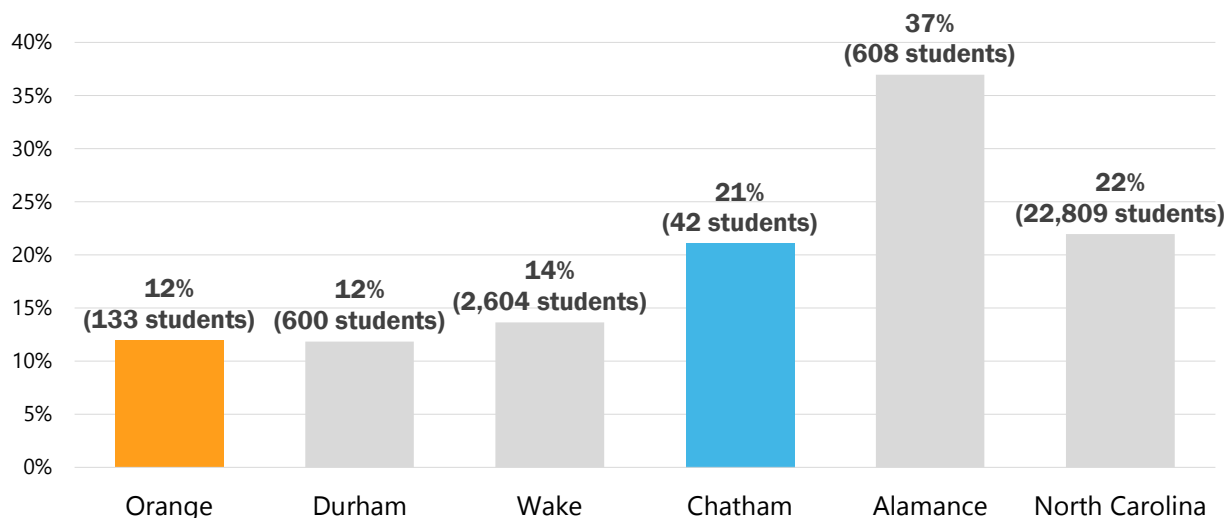


Source: NC Department of Administration

75

Change in Private School enrollment since 2020

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

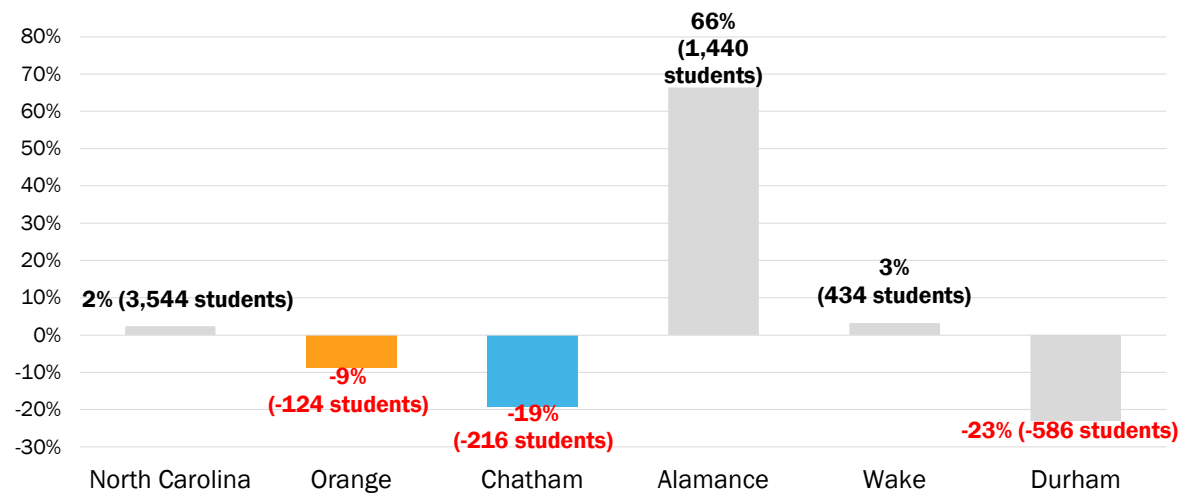


Source: NC Department of Administration

76

Change in Home School enrollment since 2020

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

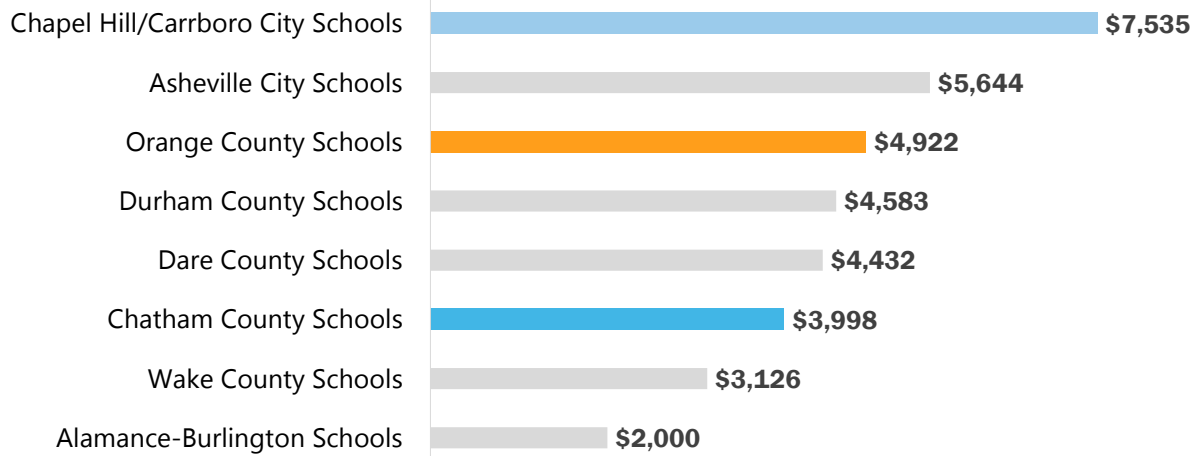


Source: NC Department of Administration

77

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

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

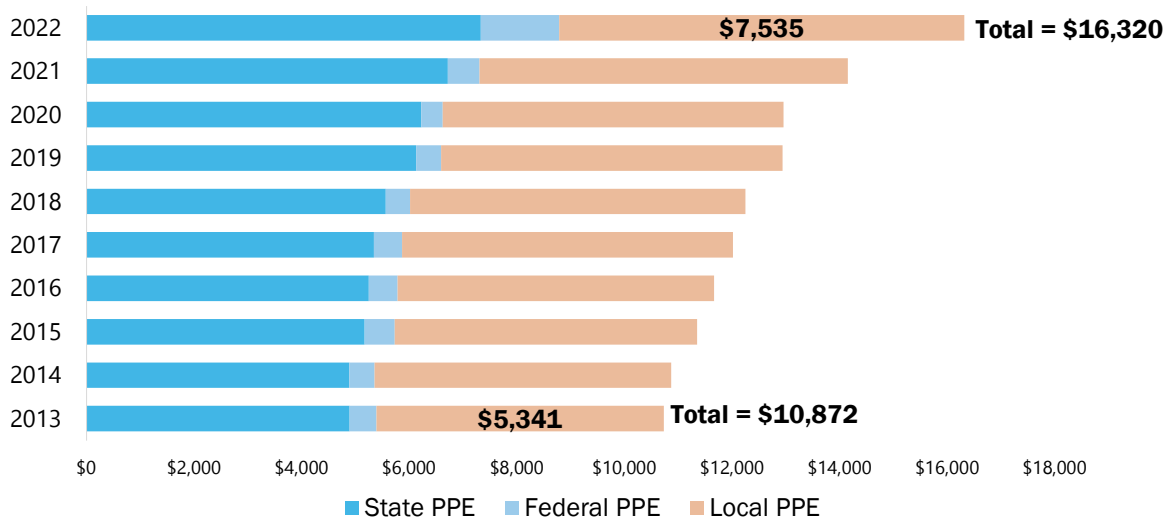


Source: NC Department of Public Instruction

78

Chapel Hill-Carrboro City Schools Per Pupil Expenditure

Trends in CHCCS Per Pupil Expenditure (PPE) by source, AY2004-AY2022



Source: NC Department of Public Instruction

79

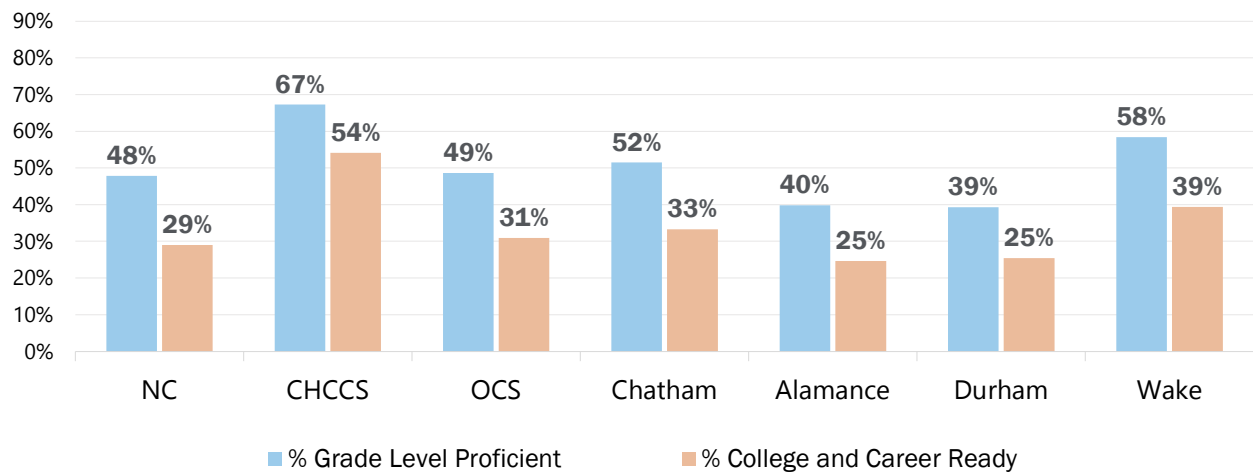
Public Education Student Performance:

- 3rd Grade Reading
- 8th Grade Science

80

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

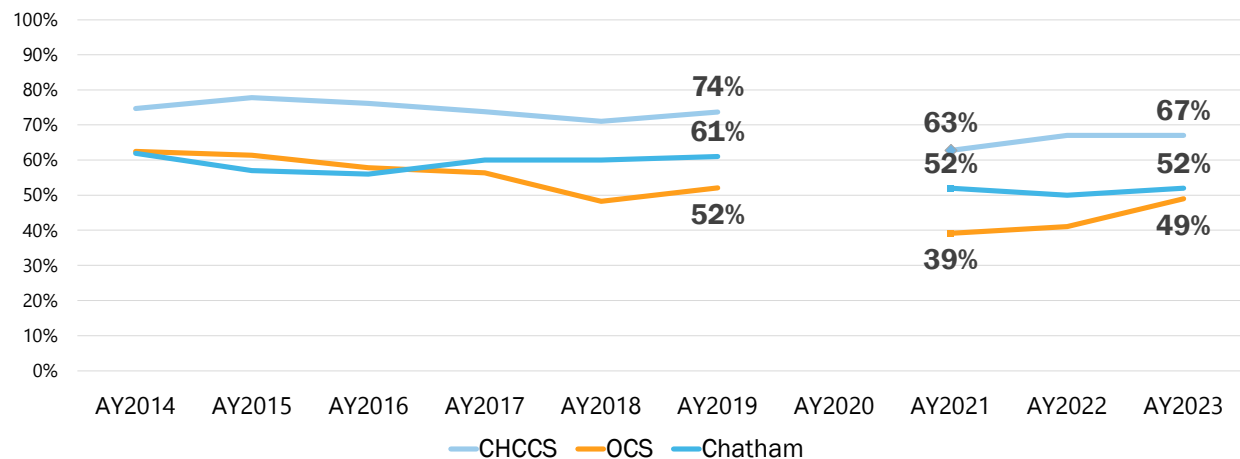


Source: NC Department of Public Instruction

81

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.

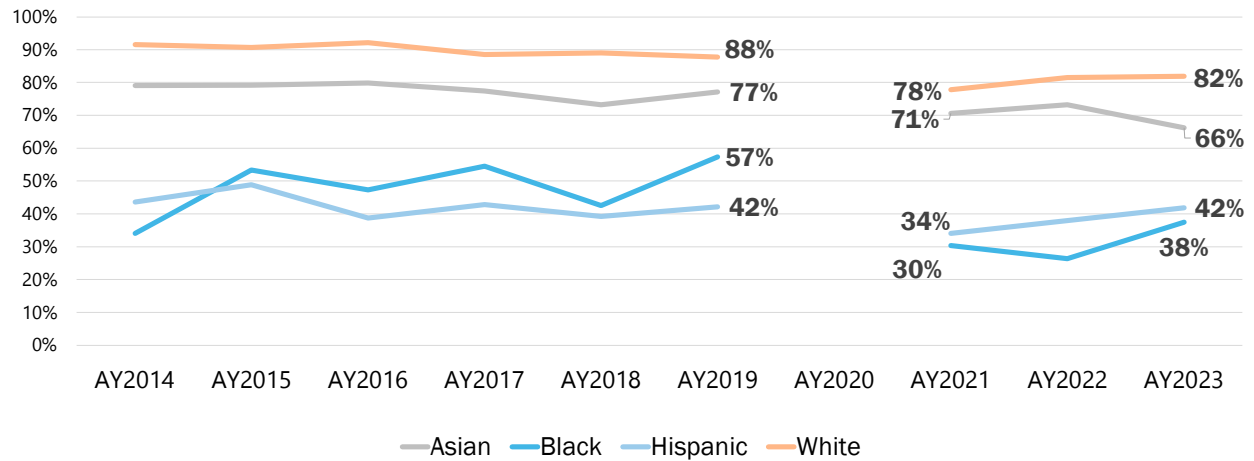


Source: NC Department of Public Instruction

82

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

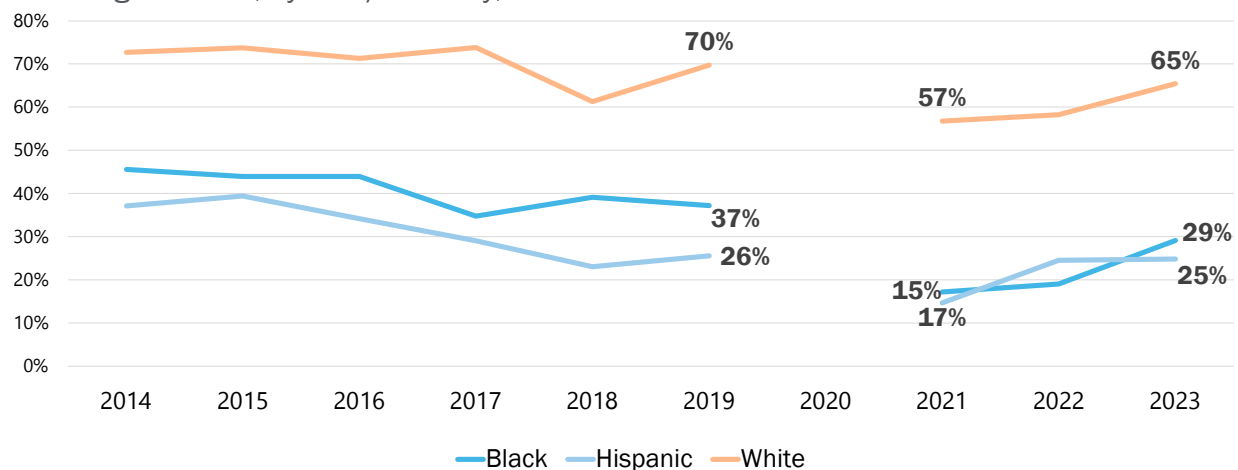


Source: NC Department of Public Instruction

83

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

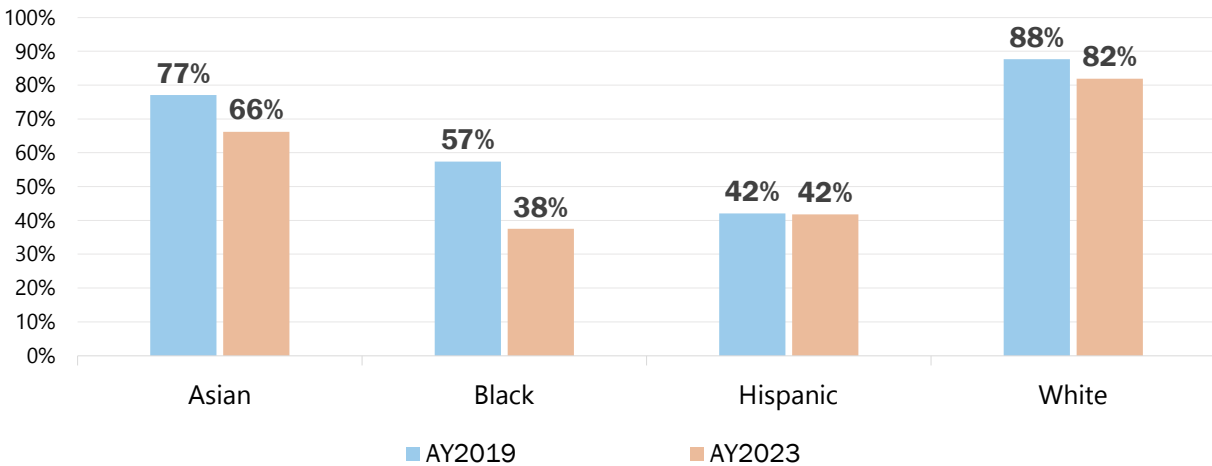


Source: NC Department of Public Instruction

84

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

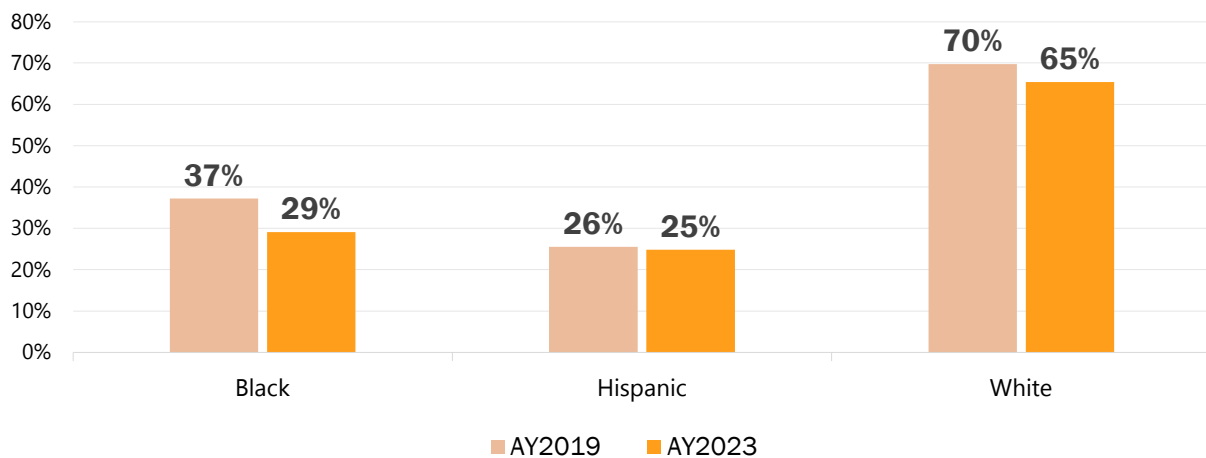


Source: NC Department of Public Instruction

85

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

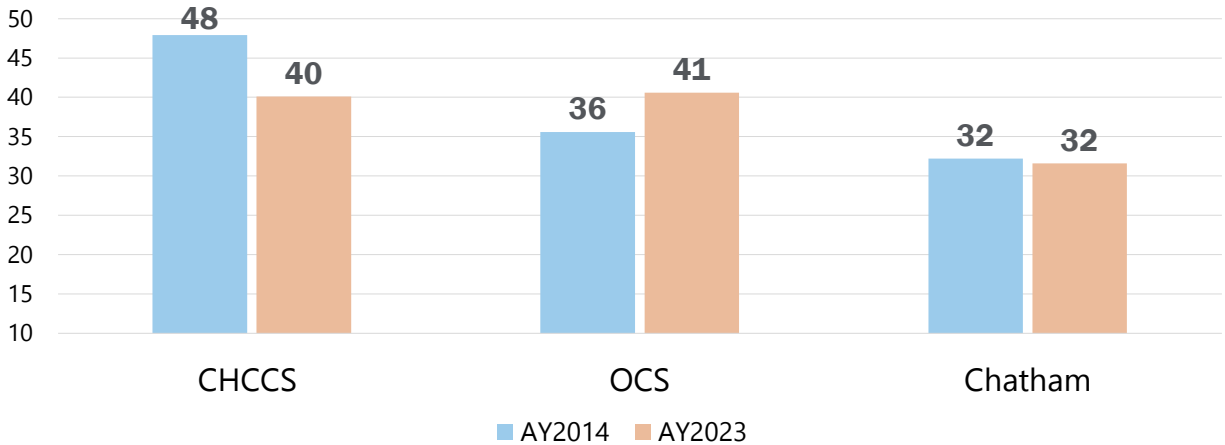


Source: NC Department of Public Instruction

86

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+).

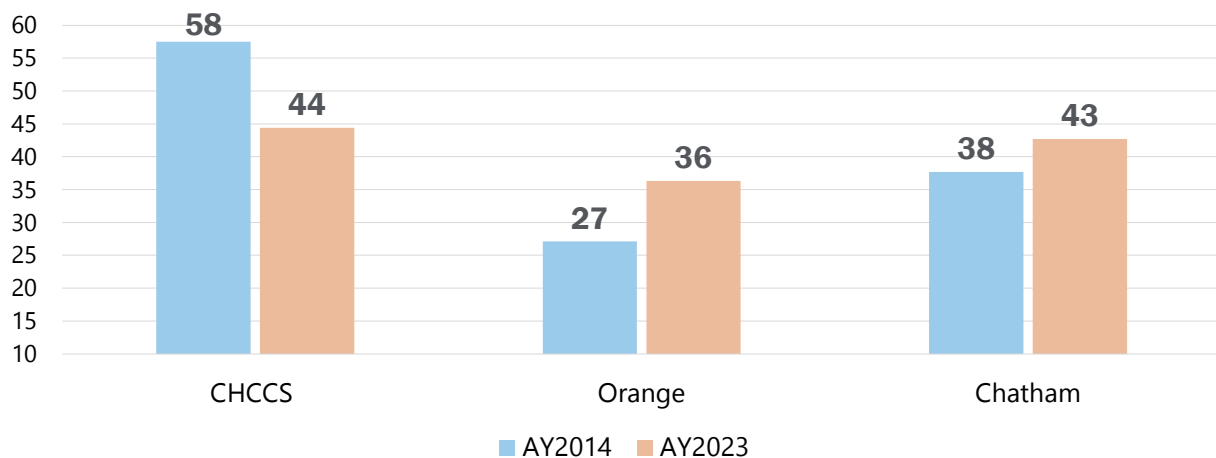


Source: NC Department of Public Instruction

87

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

88

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

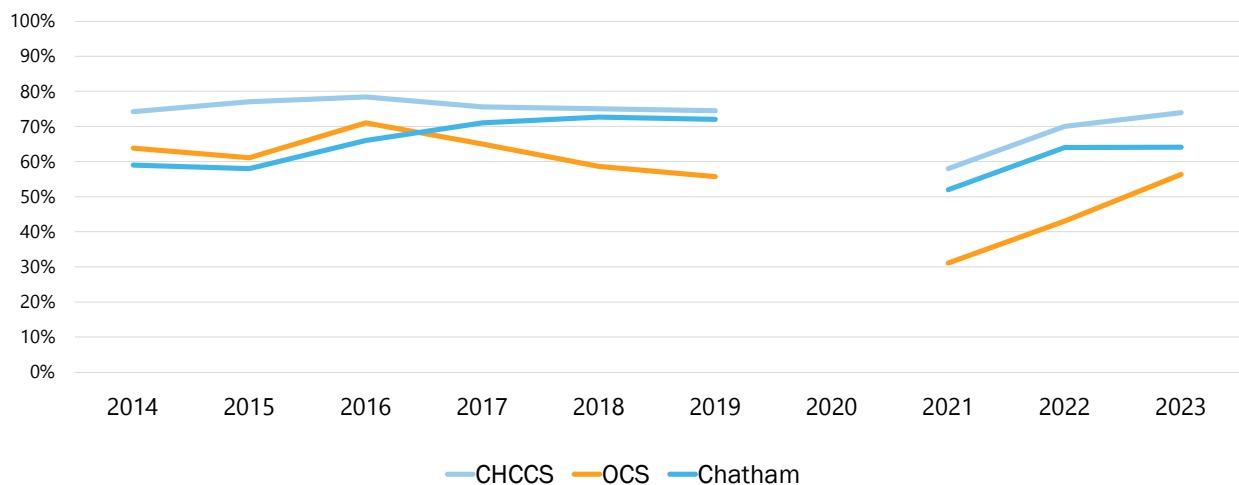
	CHCCS Grade Level Proficient	OCS Grade Level Proficient	Chatham Grade Level Proficient
Grade 3 (AY2021)	63%	39%	52%
Grade 4 (AY2022)	65%	50%	64%
Grade 5 (AY2023)	65%	51%	58%
<i>for comparison: Grade 5 (AY2019)</i>	71%	45%	60%

Source: NC Department of Public Instruction

89

3rd grade math falls sharply and then rebounds

Percent of students "Grade Level Proficient" (level 3+) on Grade 3 Math EOG test, AY2014-AY2023. No EOG tests were taken in 2020.

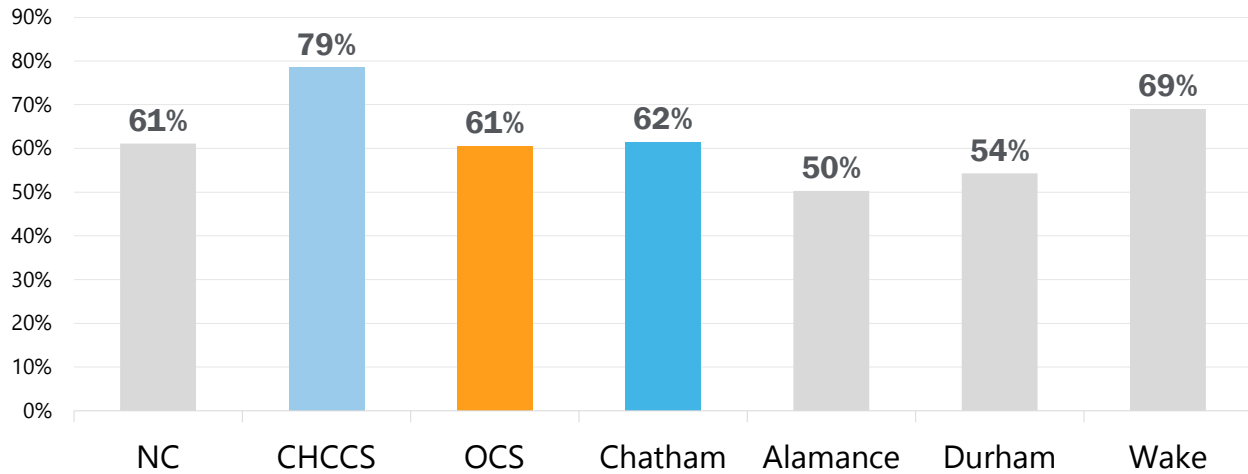


Source: NC Department of Public Instruction

90

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

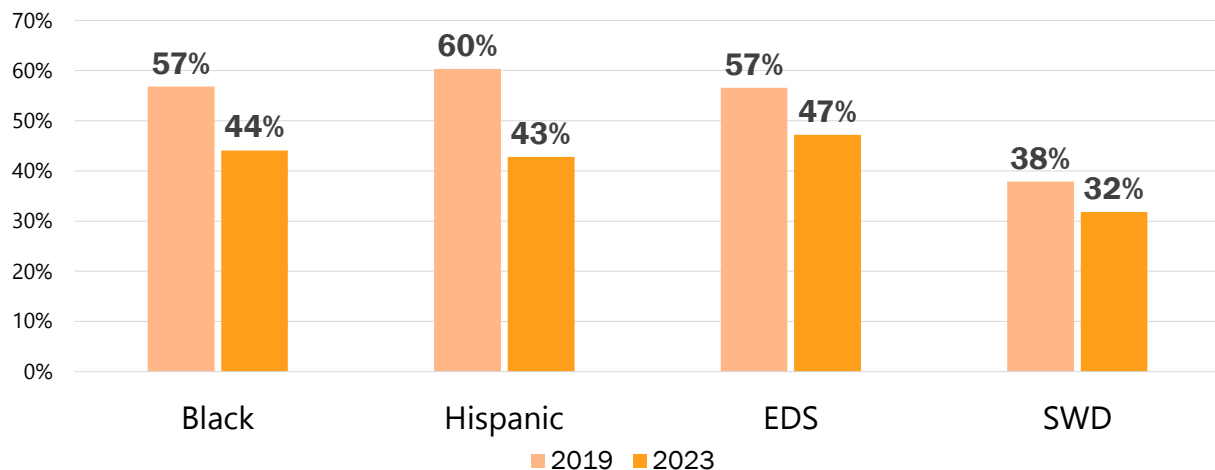


Source: NC Department of Public Instruction

91

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

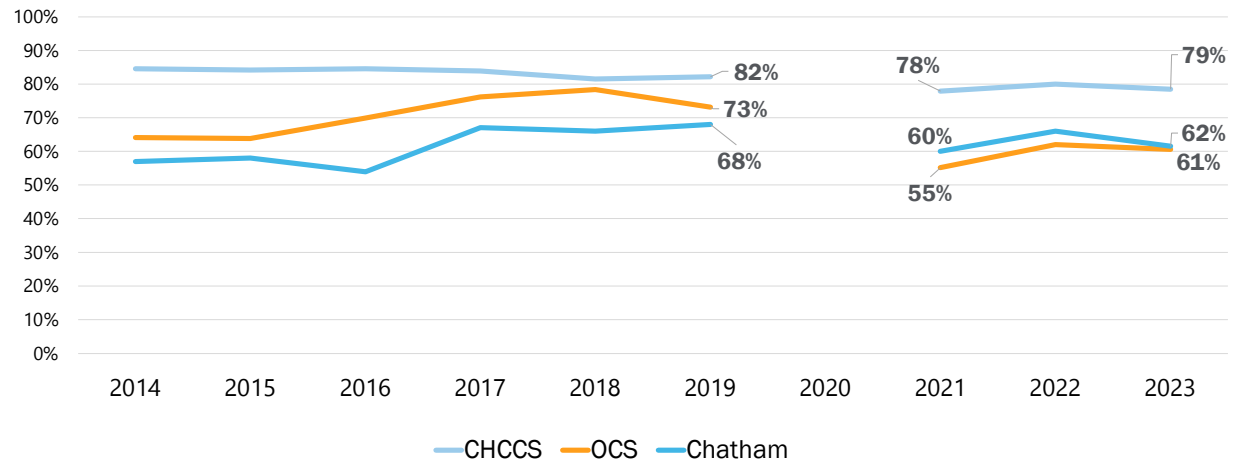


Source: NC Department of Public Instruction

92

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

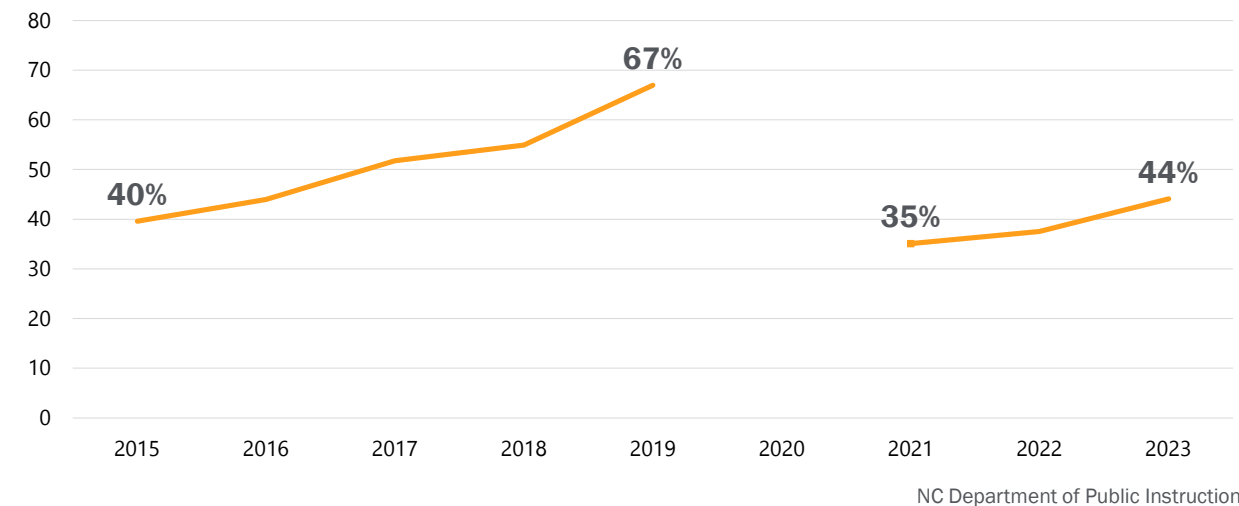
Percent of students earning “College and Career Ready” scores (level 4 or 5) on Grade 8 Science EOG test, AY2014-AY2023. No EOG tests were taken in 2020.



93

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

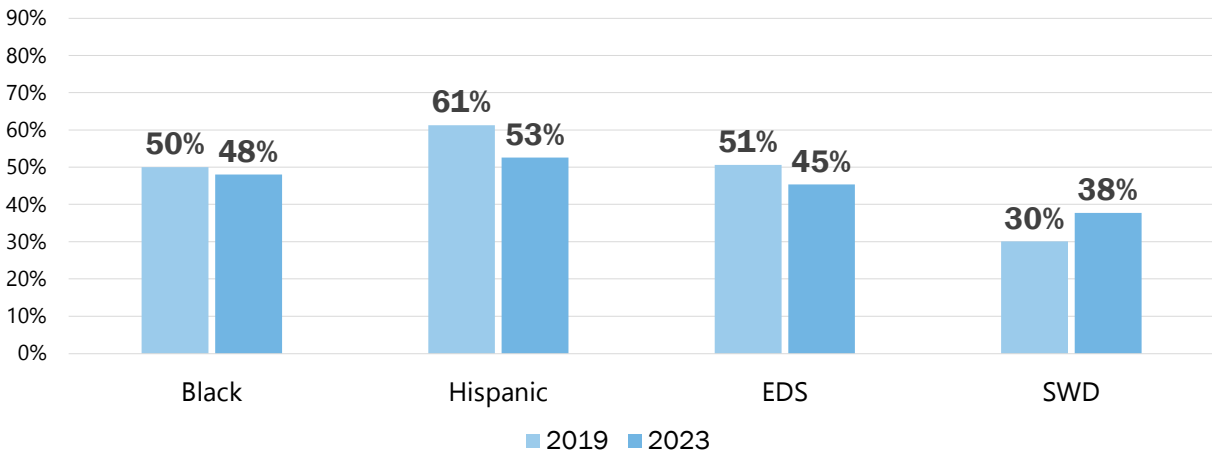
Percent of Black students earning a "College and Career Ready" score (level 4 or 5) on Grade 8 Science EOG, AY2014-AY2023



94

CHCCS percent of 8th graders “College and Career Ready” on Science EOG

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

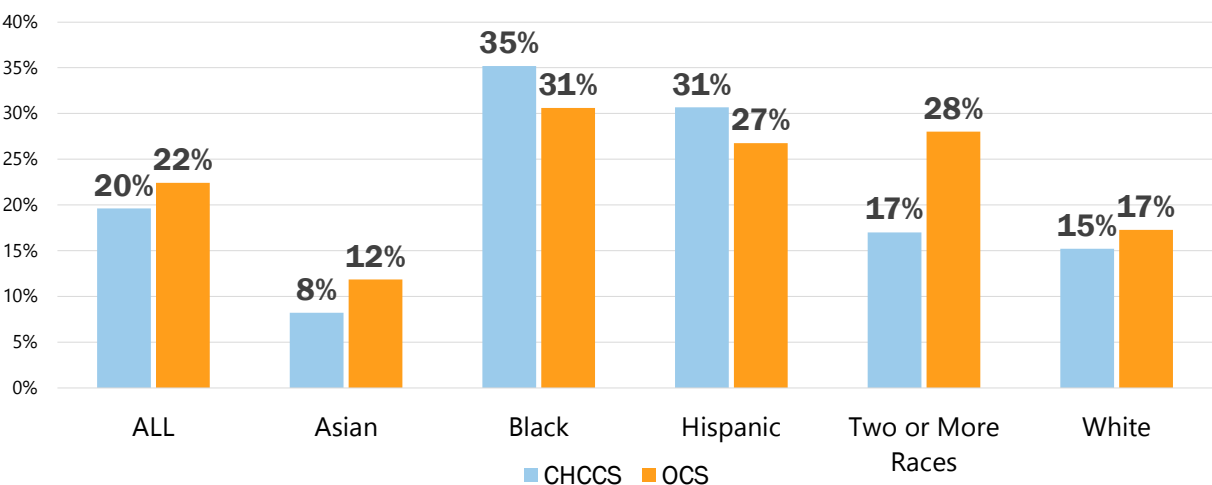


Source: NC Department of Public Instruction

95

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

96

High School, Graduation, and Post-Secondary Intentions

97

Adjusted cohort graduation rates

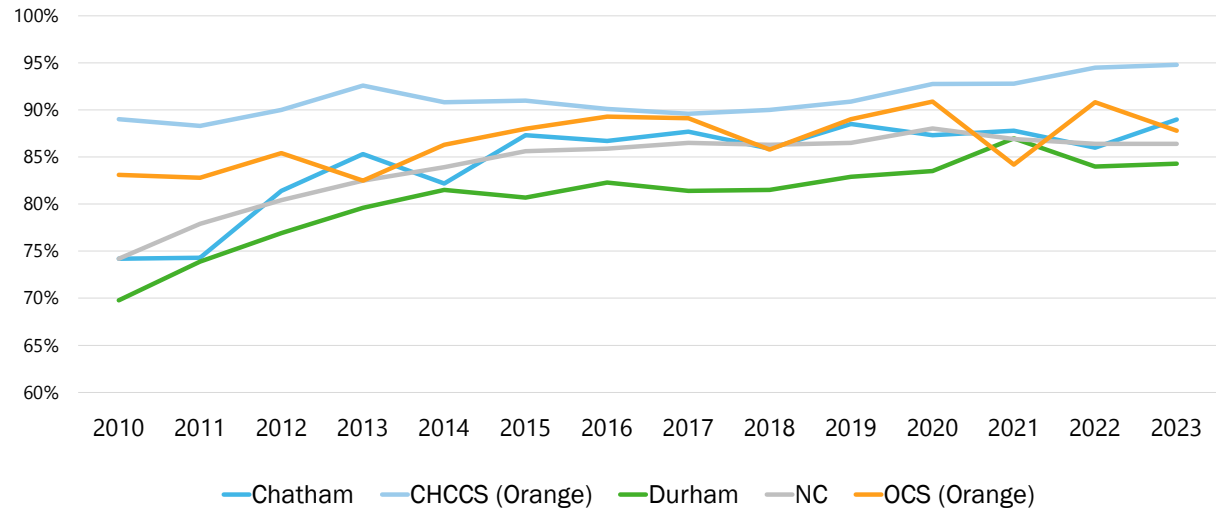
	All Students		Black Students		Hispanic Students		Economically Disadvantaged		Students with Disabilities	
	2014	2023	2014	2023	2014	2023	2014	2023	2014	2023
NC	84%	86%	80%	84%	77%	81%	78%	84%	64%	72%
CHCCS (Orange)	91%	95%	91%	91%	78%	89%	79%	90%	69%	84%
OCS (Orange)	86%	88%	84%	87%	70%	84%	74%	84%	72%	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

98

Local district 4-year graduation rates all improve

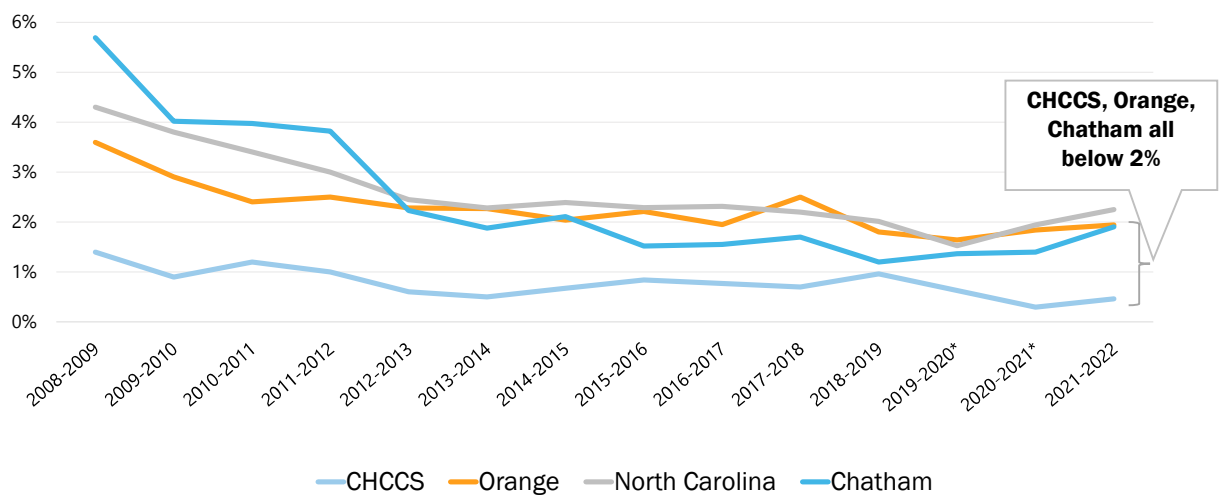
Share of 9th grade cohort that graduated in 4 years, by graduation year



Source: NC Department of Public Instruction

99

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

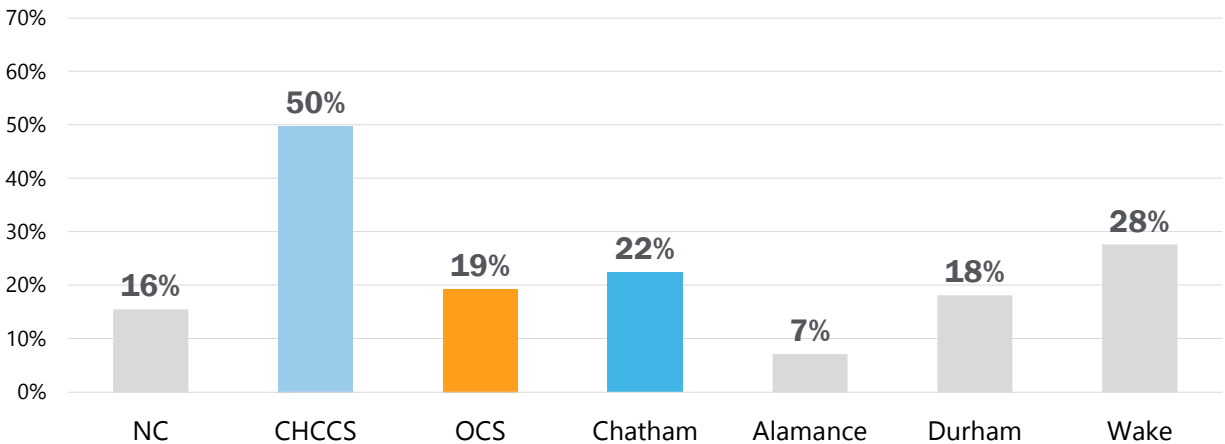


Source: NC Department of Public Instruction

100

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

AY2023

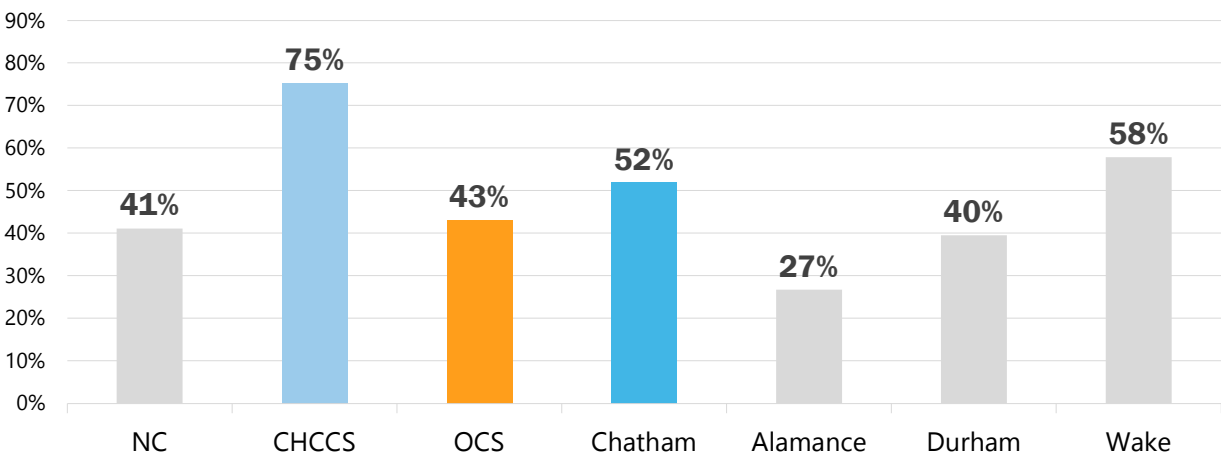


Source: NC Department of Public Instruction

101

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

AY2023

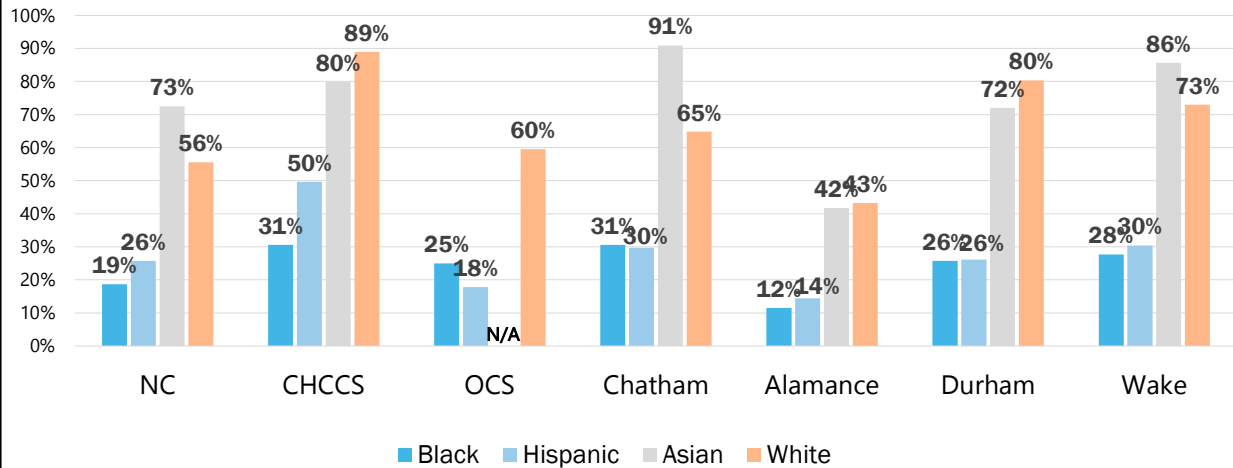


Source: NC Department of Public Instruction

102

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

AY2023

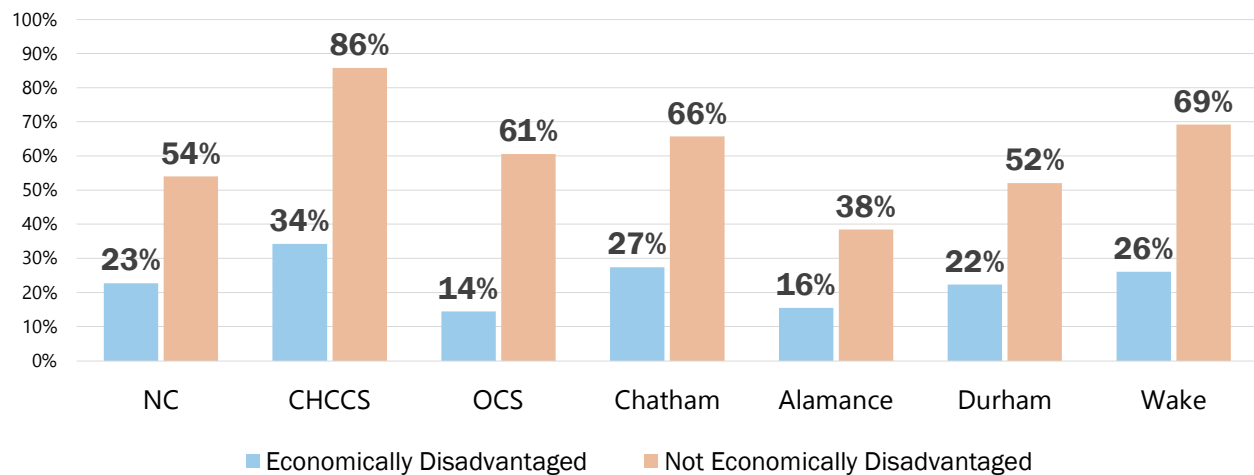


Source: NC Department of Public Instruction

103

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

AY2023

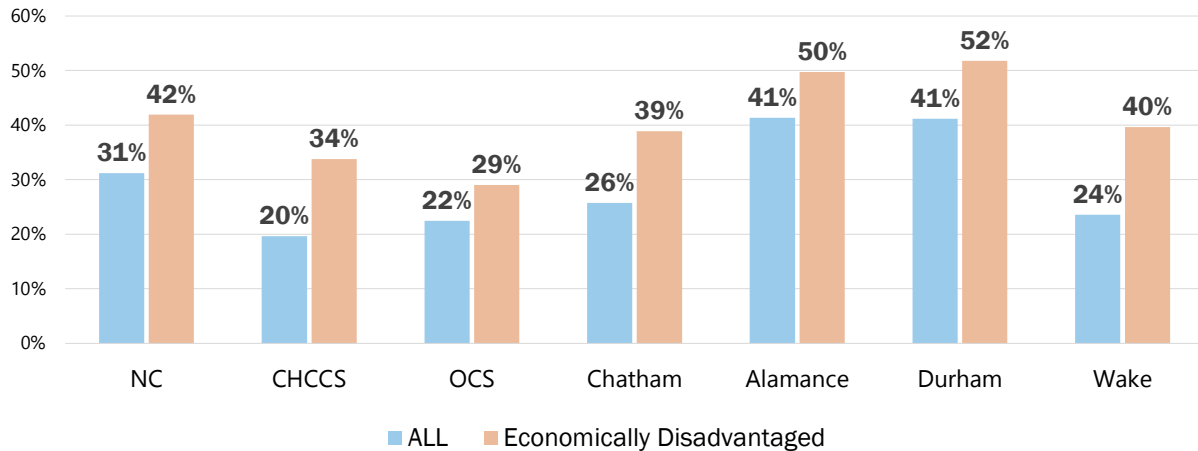


Source: NC Department of Public Instruction

104

Chronic absenteeism of all students and economically disadvantaged students, AY2022

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

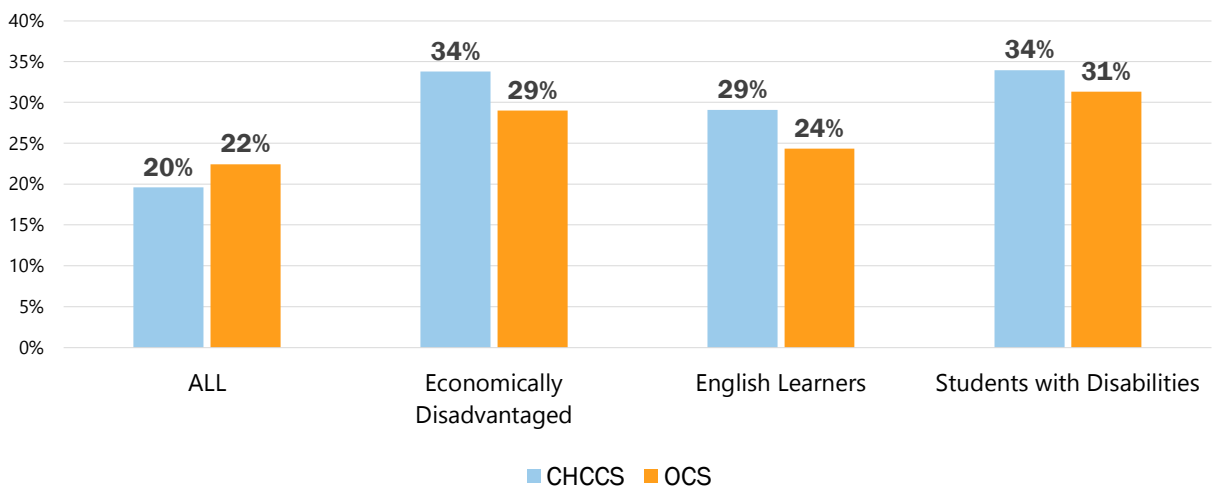


Source: NC Department of Public Instruction

105

Chronic absenteeism by subgroup, AY2022

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

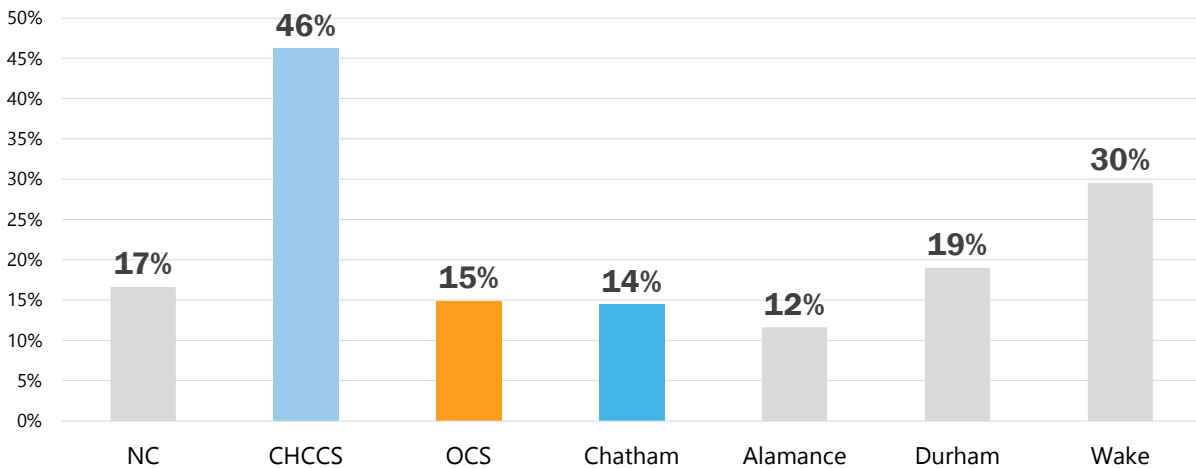


Source: NC Department of Public Instruction

106

AP participation

Percent of high school students enrolled in Advanced Placement (AP) courses, AY 2022

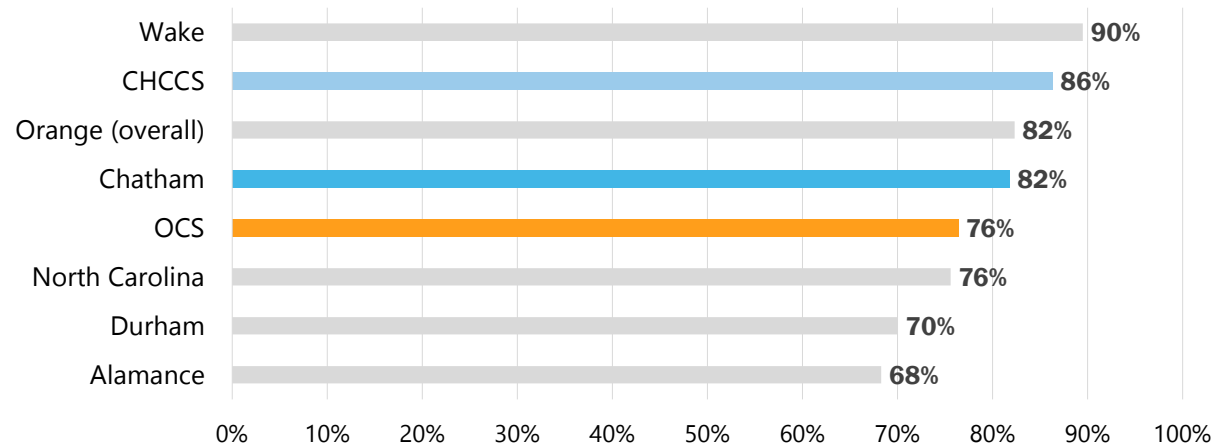


Source: NC Department of Public Instruction

107

Postsecondary intentions

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

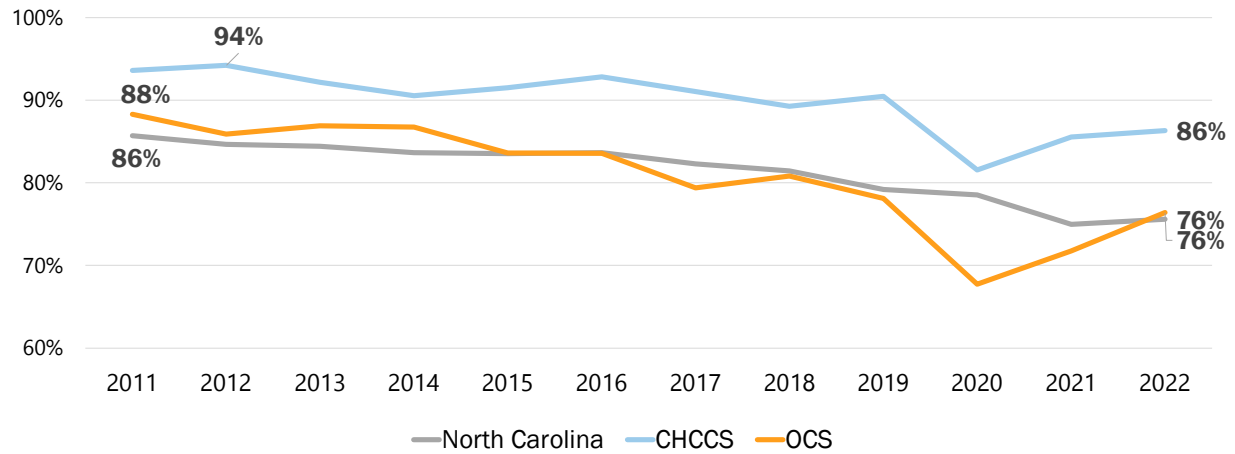


Source: NC Department of Public Instruction

108

Postsecondary intentions

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

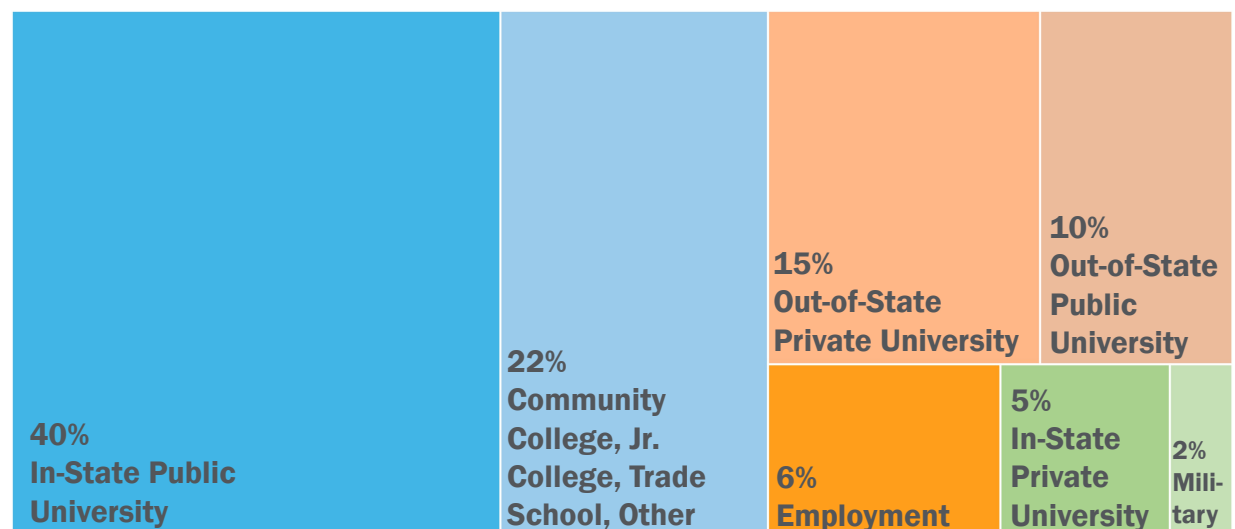


Source: NC Department of Public Instruction

109

CHCCS student postsecondary intentions

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

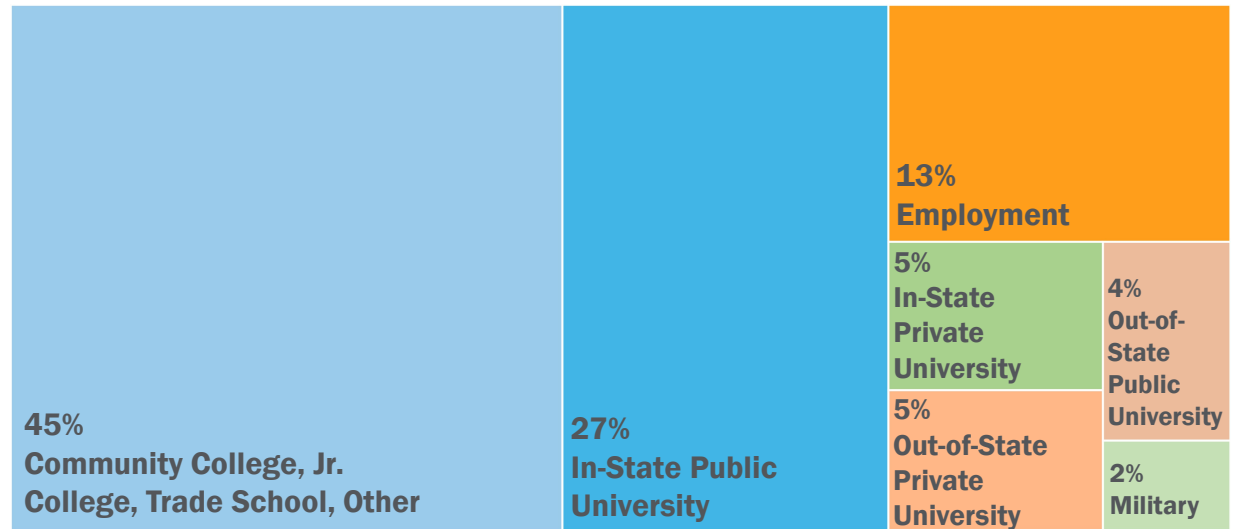


Source: NC Department of Public Instruction

110

OCS student postsecondary intentions

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



Source: NC Department of Public Instruction

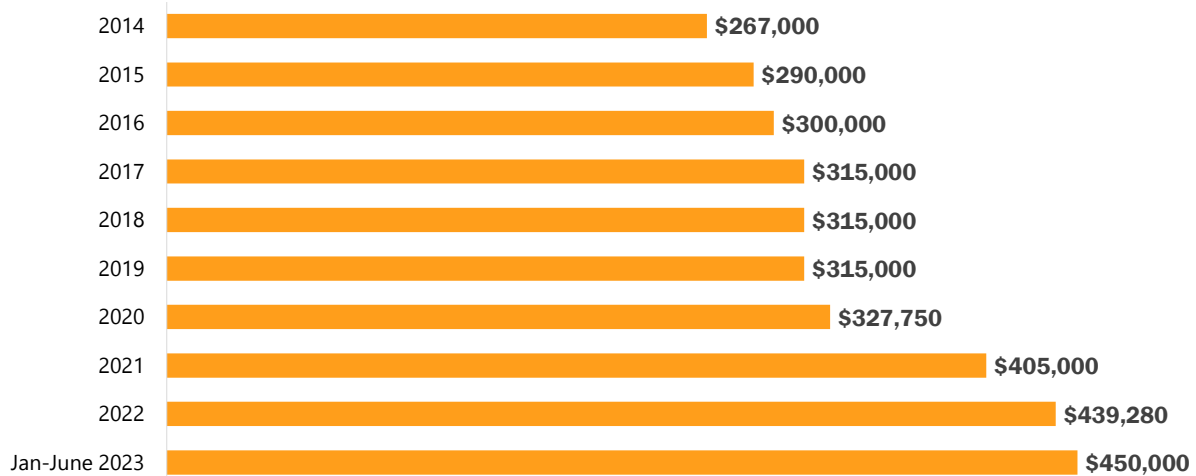
111

**For Sale Housing &
Homeownership Rates**

112

Orange County median home sales price

Orange County median home sale price, 2013 – June 2023

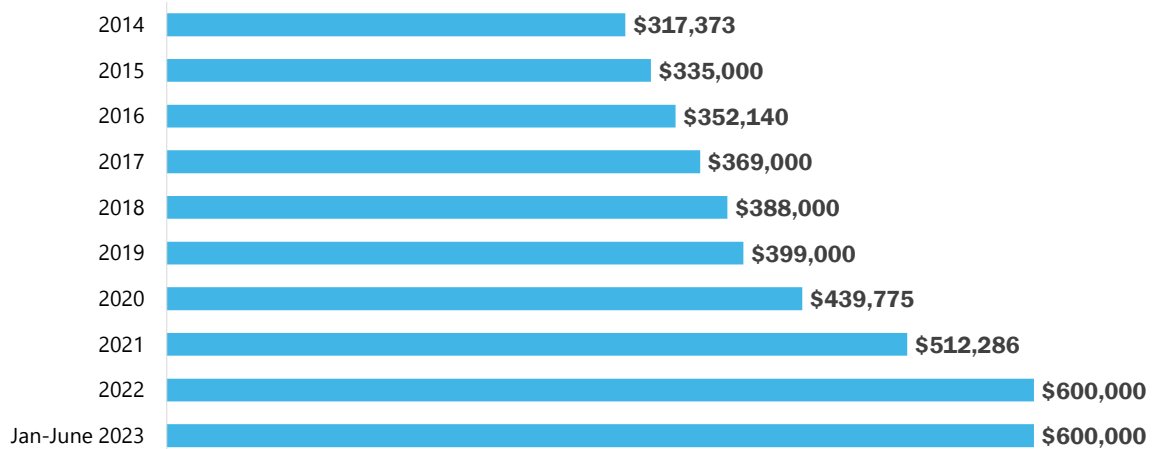


Source: Triangle MLS/Allen Tate Realtors

113

Chatham County median home sales price

Chatham County median home sale price, 2011 – June 2023

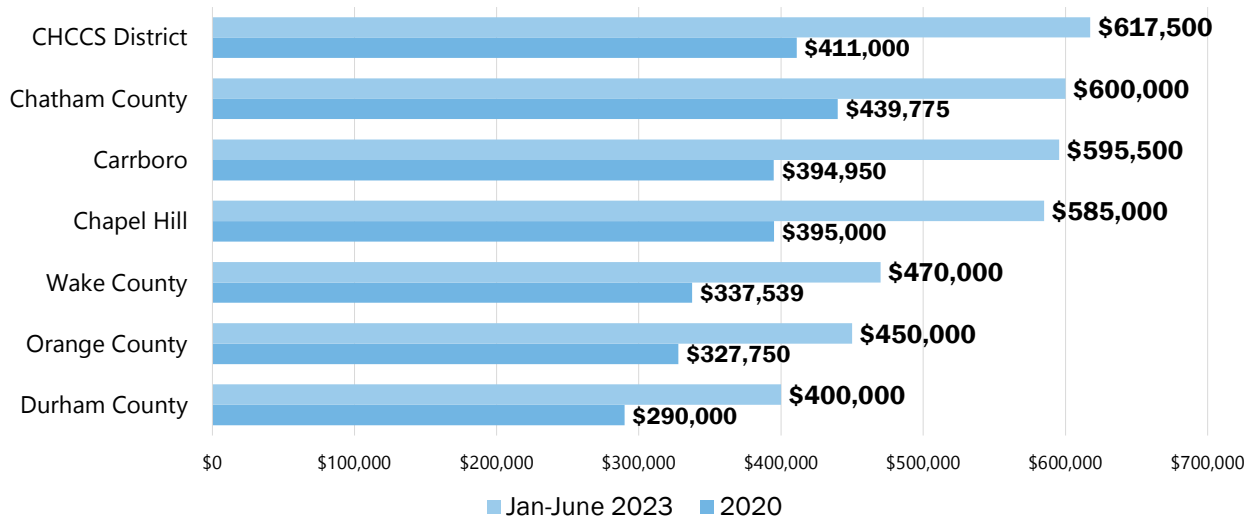


Source: Triangle MLS/Allen Tate Realtors

114

Median home sales price change 2020 - June 2023

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

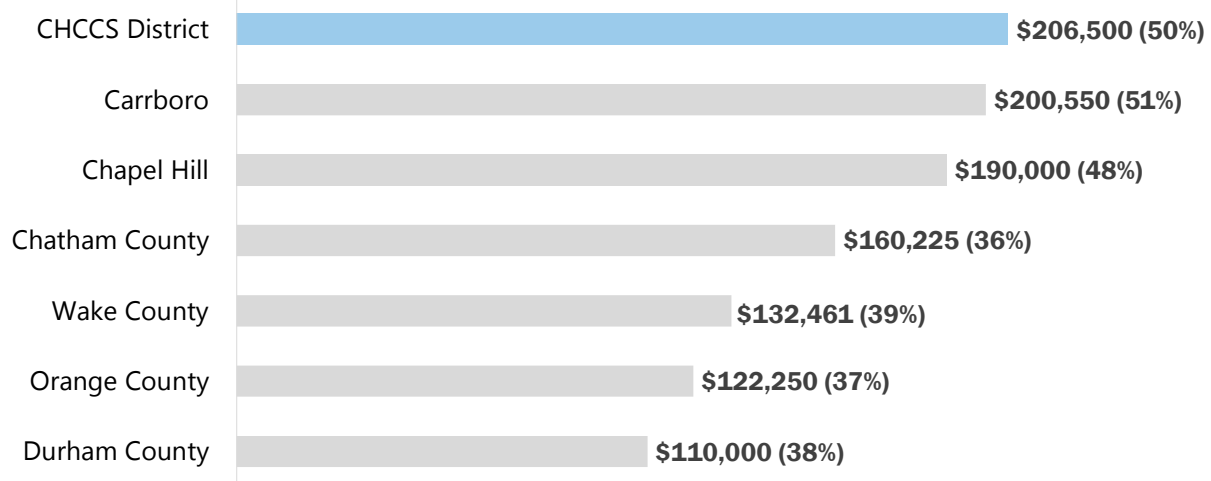


Source: Triangle MLS/Allen Tate Realtors

115

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

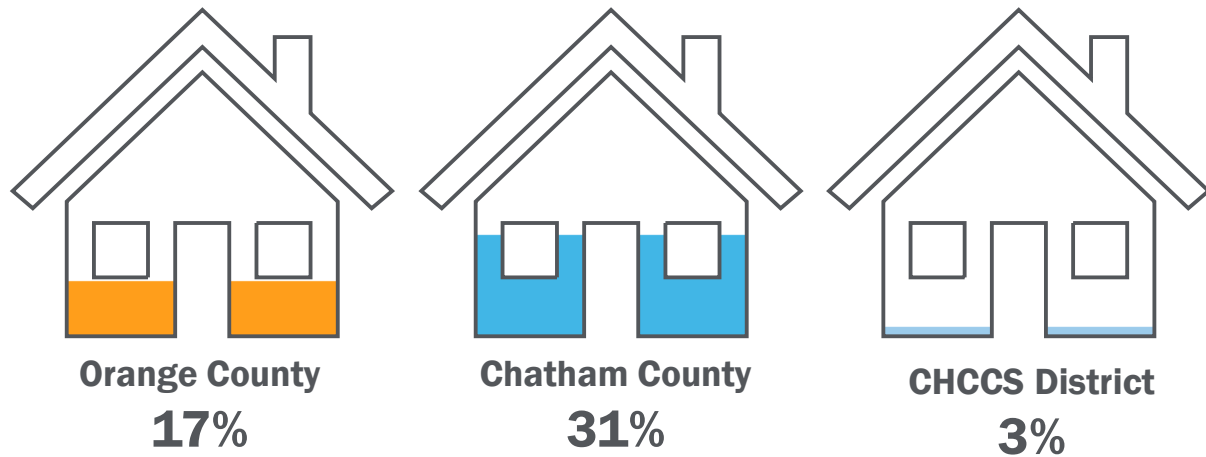


Source: Triangle MLS/Allen Tate Realtors

116

New home sales

New housing units as percent of total sales, 2022

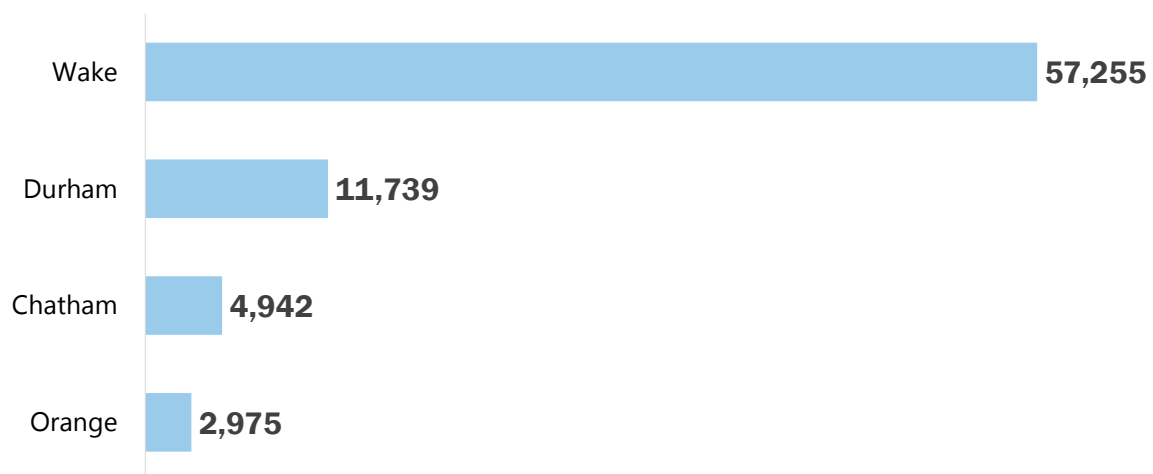


Source: Triangle MLS/Allen Tate Realtors

117

New home construction

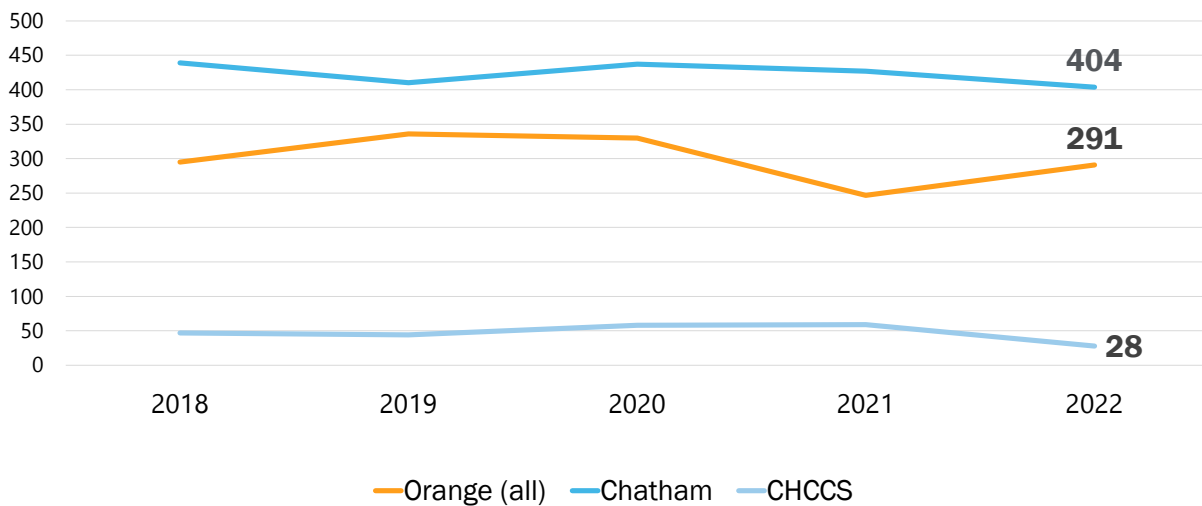
Number of new for-sale housing units built between Jan. 2010 – June 2023



Source: Triangle MLS/Allen Tate Realtors

118

Total new construction home sales per year

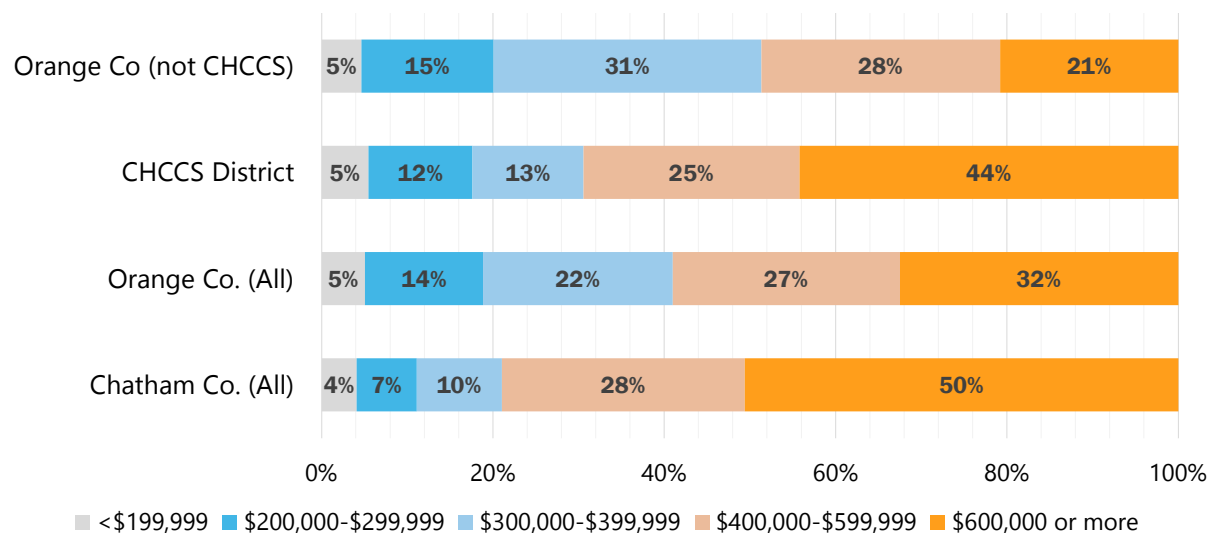


Source: Triangle MLS/Allen Tate Realtors

119

2022 home sales by price band

2022 number of home transactions by closing price

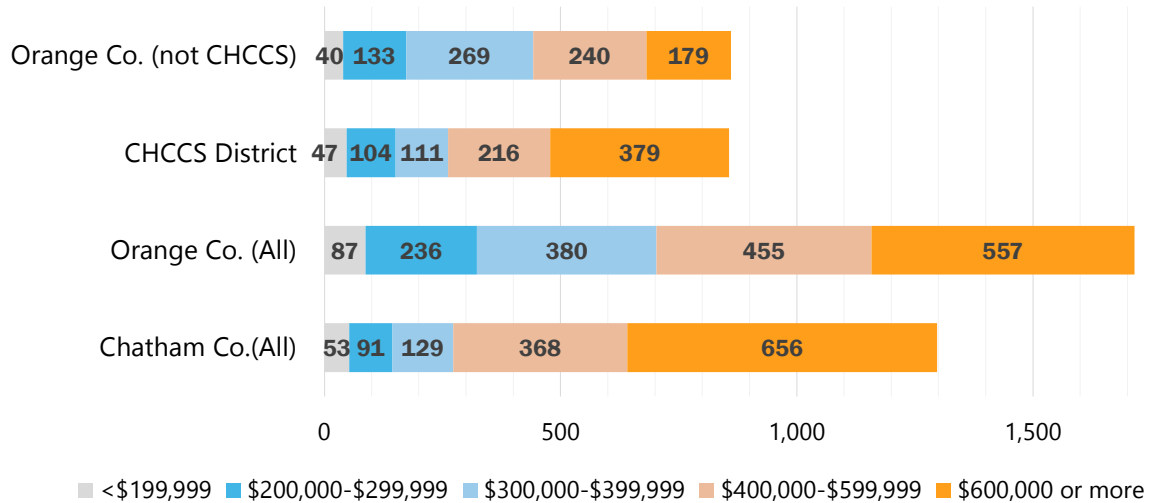


Source: Triangle MLS/Allen Tate Realtors

120

2022 home sales by price band

2022 number of home transactions by closing price

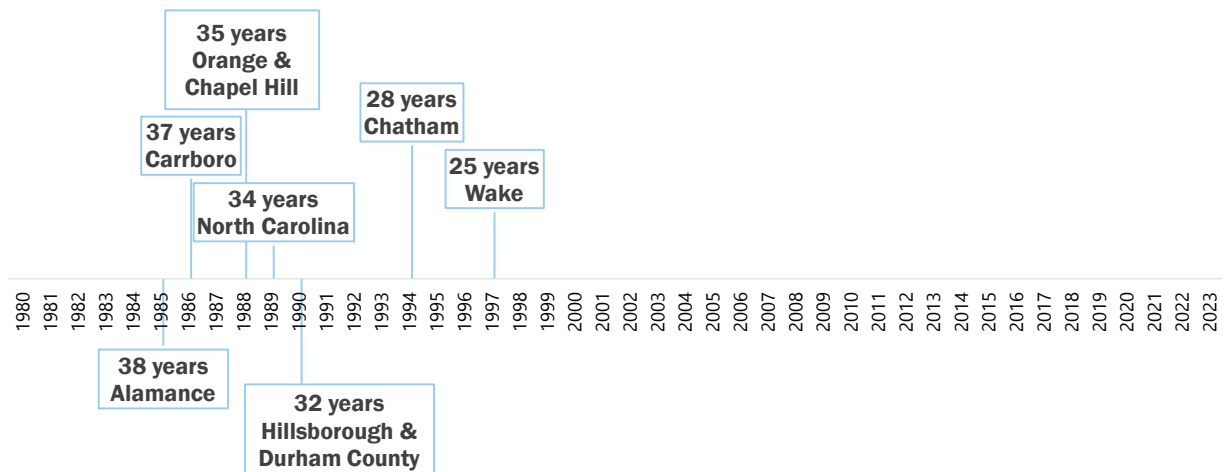


Source: Triangle MLS/Allen Tate Realtors

121

Median age of housing structures

Median age of structures built

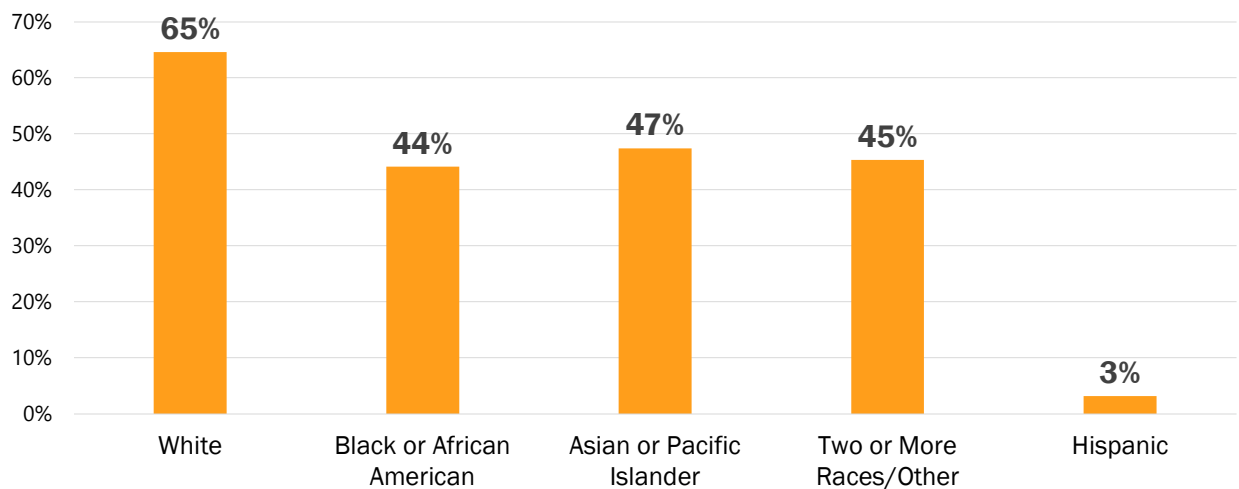


Source: American Community Survey (2017-2021 5-Year Estimates)

122

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

123

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

124

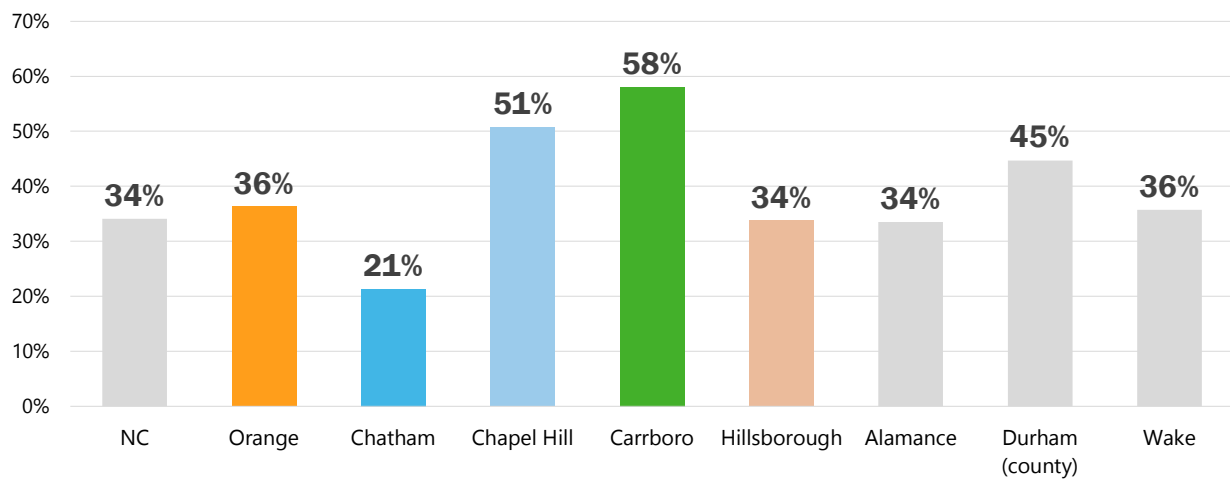
Housing (For Rent)

American Community Survey Estimates

127

Renters

Share of renter-occupied households, 2017-21

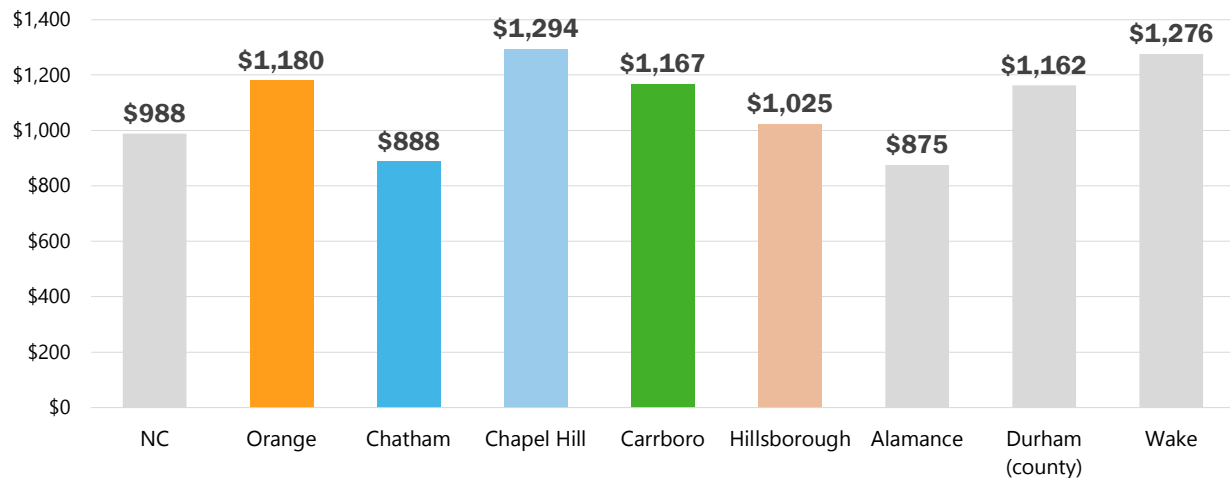


Source: American Community Survey (2017-2021 5-Year Estimates)

128

Median rent

Median rent estimated by the American Community Survey, 2017-21

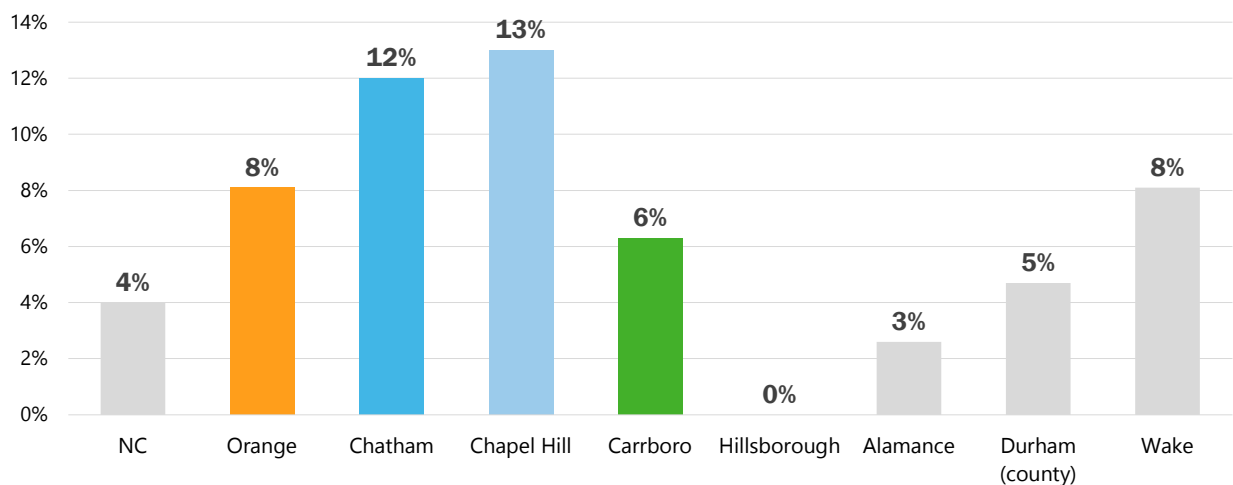


Source: American Community Survey (2017-2021 5-Year Estimates)

129

Renters paying over \$2,000/mo

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

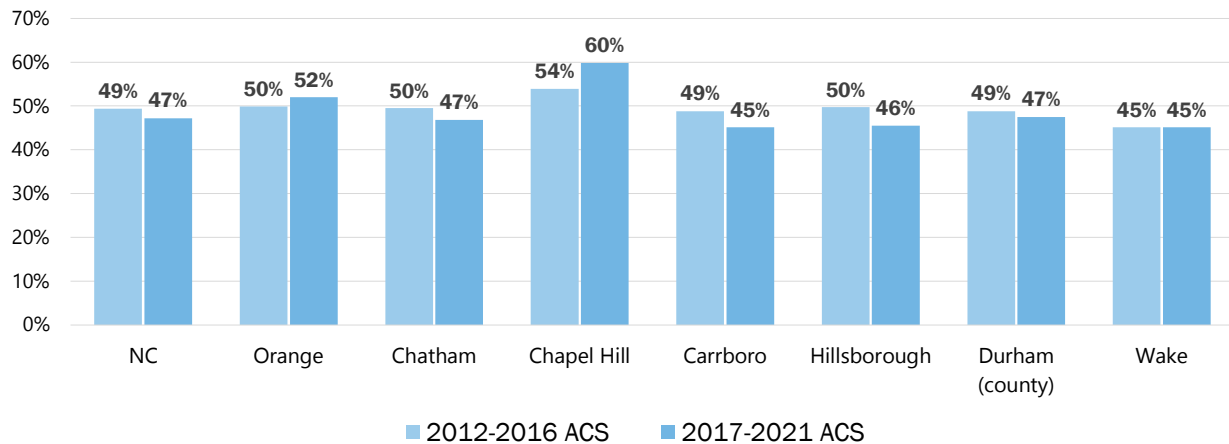


Source: American Community Survey (2017-2021 5-Year Estimates)

130

Cost-burdened renters

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



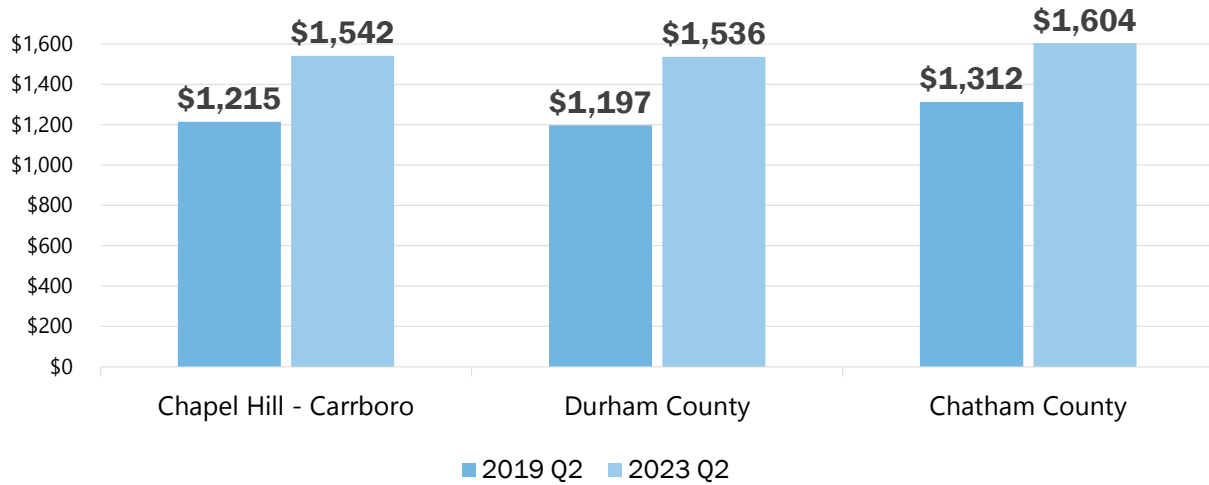
Source: American Community Survey (2017-2021 5-Year Estimates)

131

Housing (For Rent)
Community actual from Eller Capital

132

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

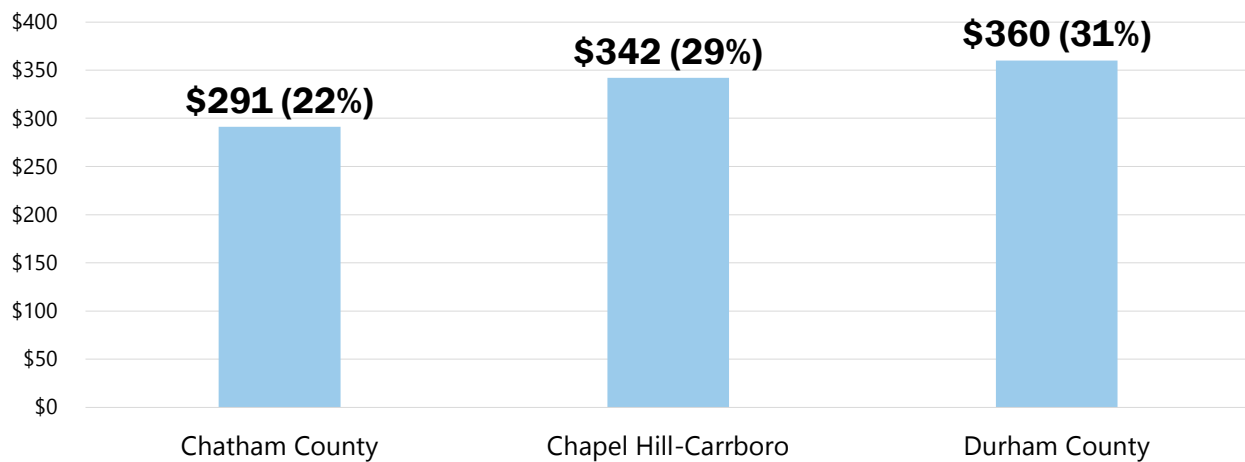


Source: Eller Capital

133

Rent increases

Growth in multifamily average annual rent from 2019 to June 2023

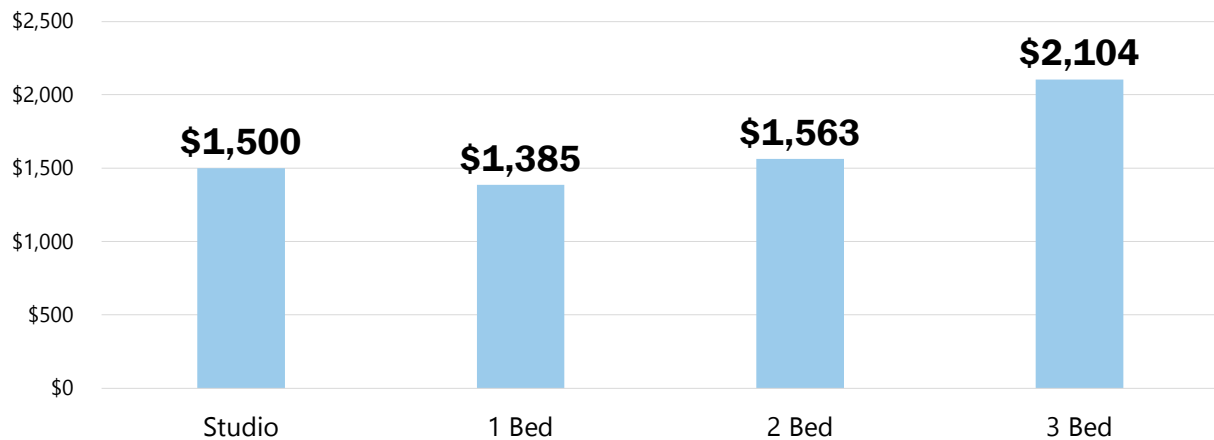


Source: Eller Capital

134

Average asking rent in Chapel Hill-Carrboro

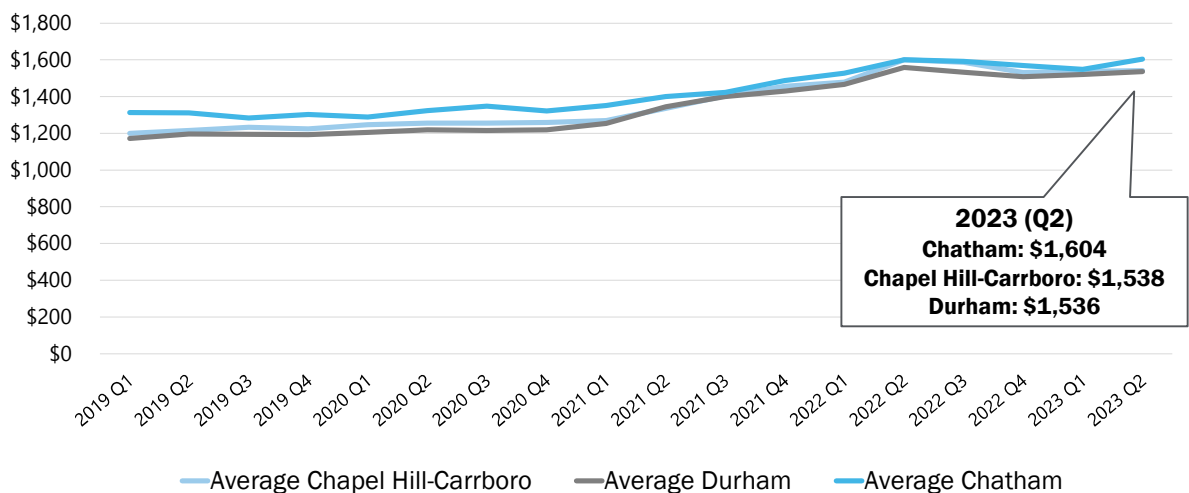
Chapel Hill-Carrboro multifamily average asking rent, 2023(Q2)



Source: Eller Capital

135

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

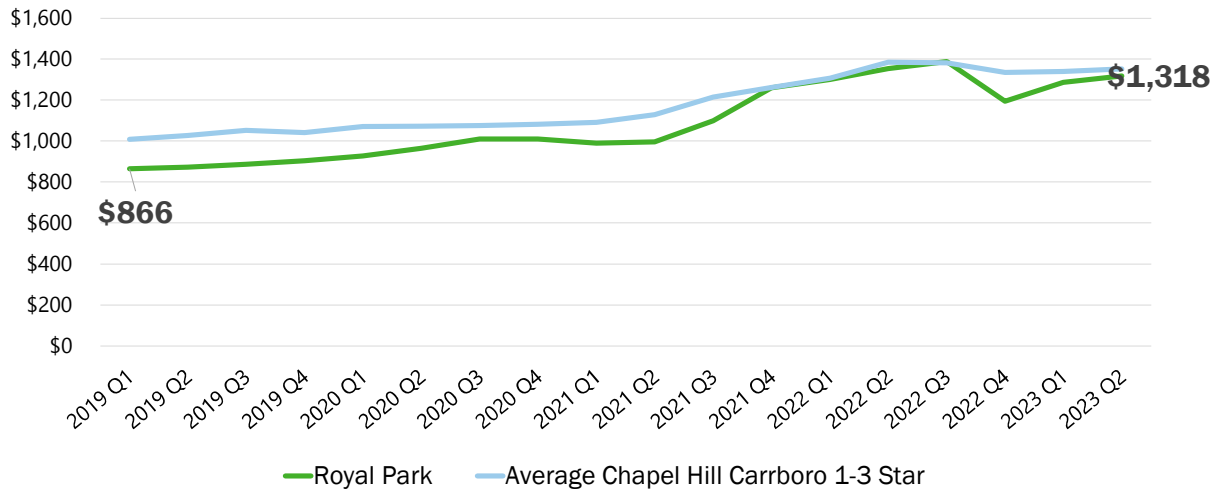


Source: Eller Capital

136

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

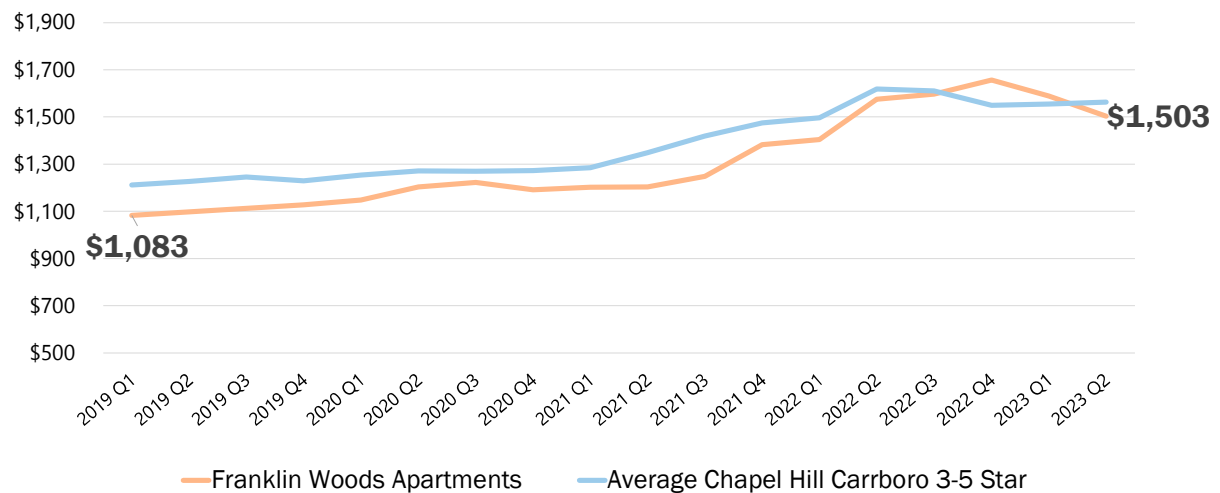
Change in average asking rent 2019Q1 through 2023Q2



Source: Eller Capital

137

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

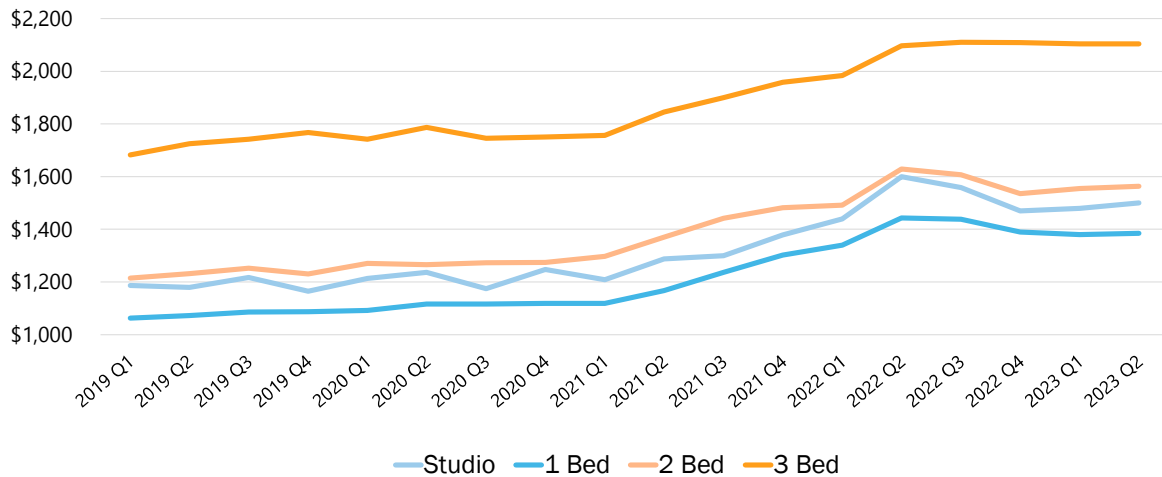


Source: Eller Capital

138

Multifamily rent prices have moderated since Q2 2020

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

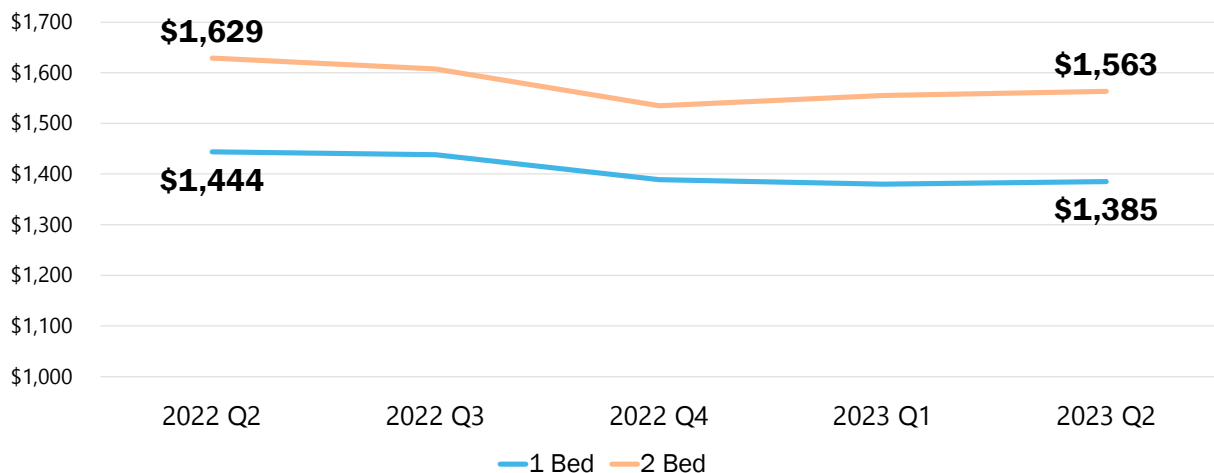


Source: Eller Capital

139

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

140

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 2023 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

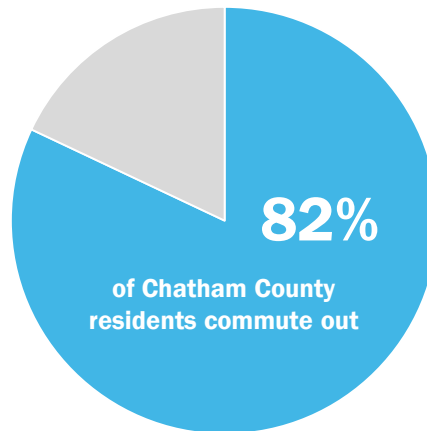
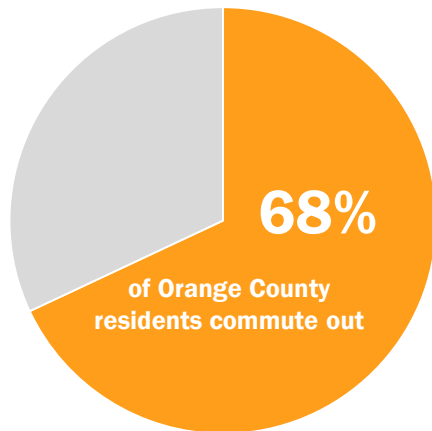
141

Commuting & Worker Ins-and-Outs

142

Out-commuting

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

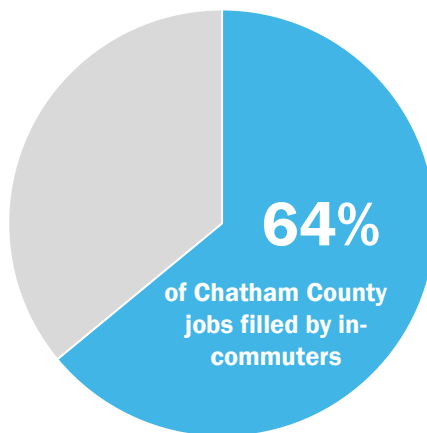
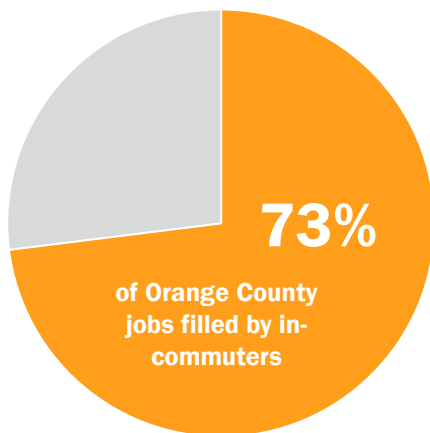


Source: US Census Bureau LODS (OnTheMap)

143

In-commuting

Percent of county jobs filled by in-commuters, 2020

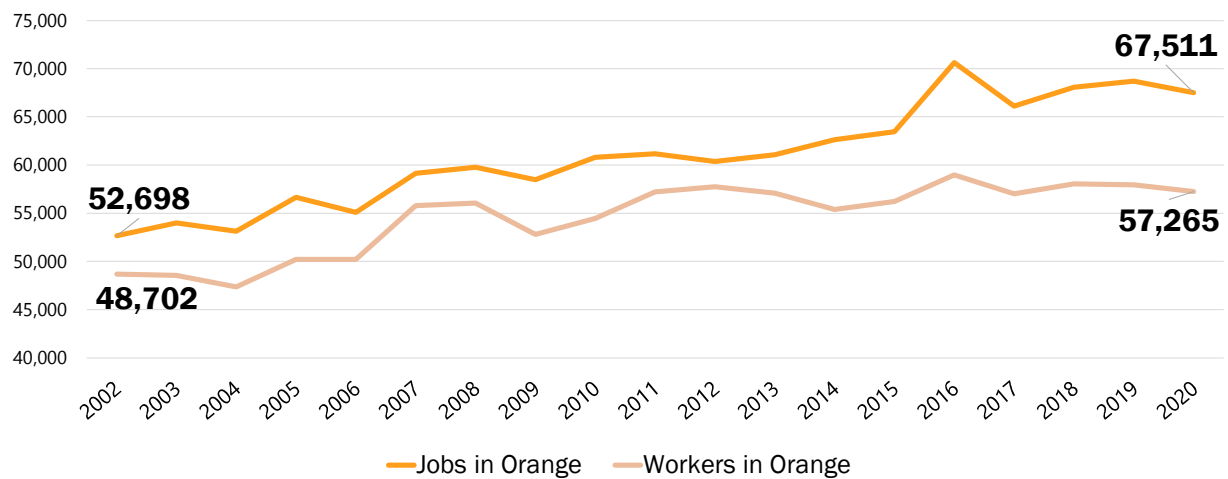


Source: US Census Bureau LODS (OnTheMap)

144

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)

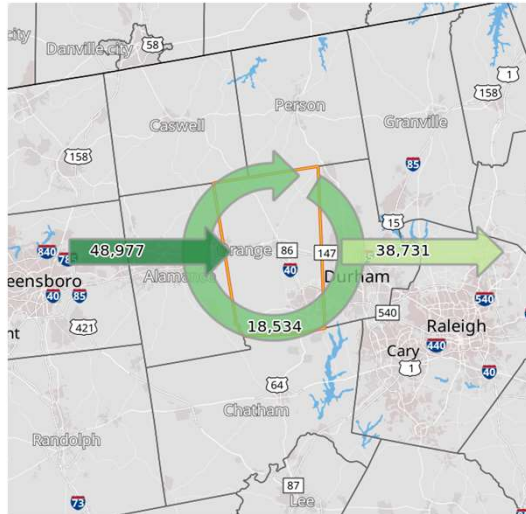
145

Worker Inflow & Outflow

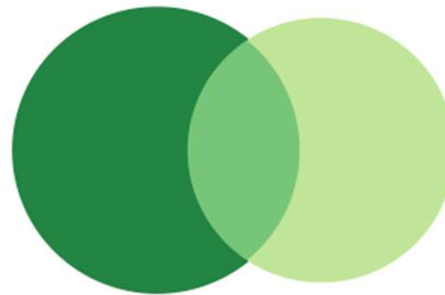
146

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



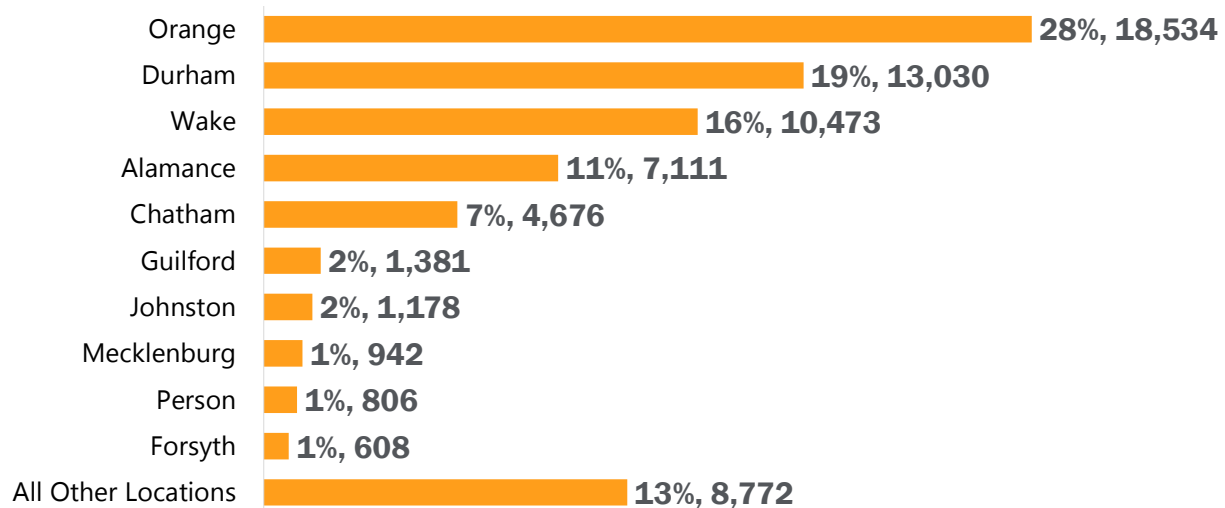
48,977 - Employed in Selection Area, Live Outside
38,731 - Live in Selection Area, Employed Outside
18,534 - Employed and Live in Selection Area

Source: US Census Bureau LODS (OnTheMap)

147

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

Orange County workers by county of residence, 2020

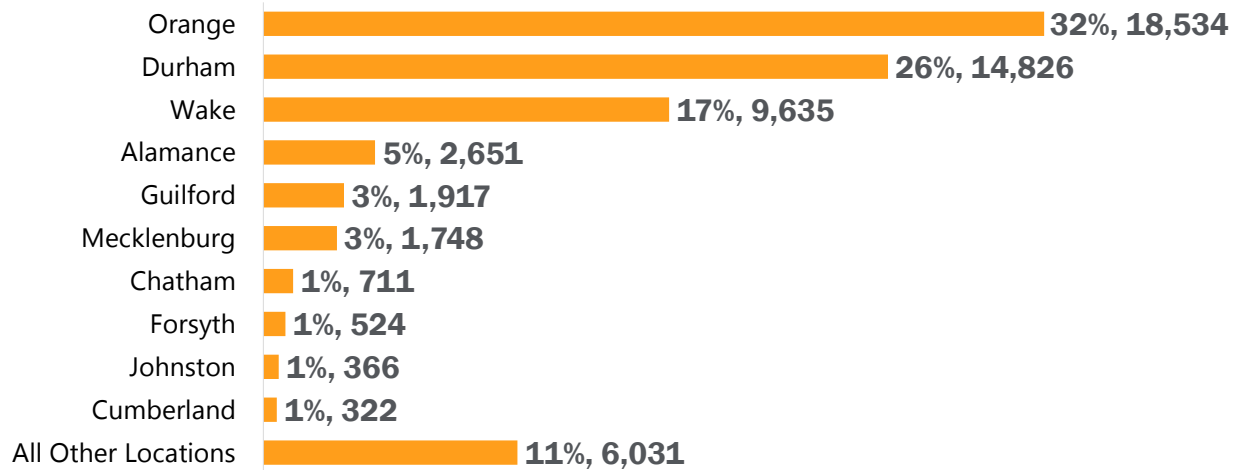


Source: US Census Bureau LODS (OnTheMap)

148

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

Location of primary job for residents of Orange County, 2020

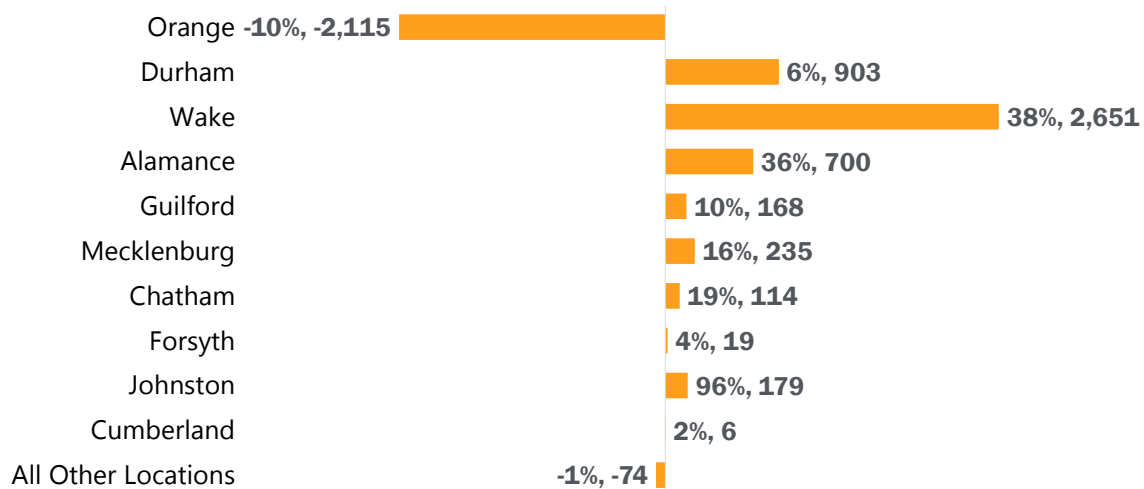


Source: US Census Bureau LODS (OnTheMap)

149

Change in where Orange County residents work

Change in location of Orange County residents' primary job from 2010-2022

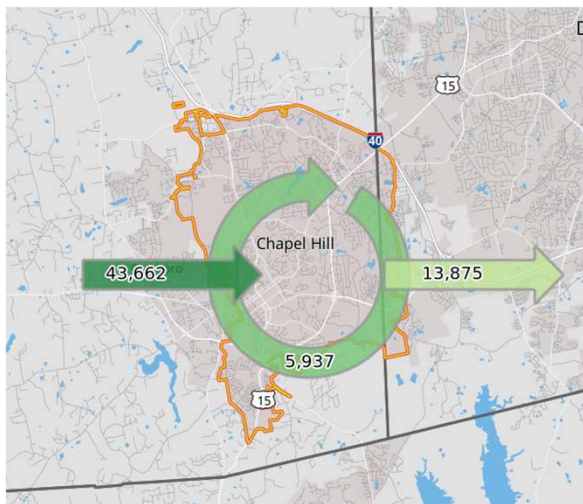


Source: US Census Bureau LODS (OnTheMap)

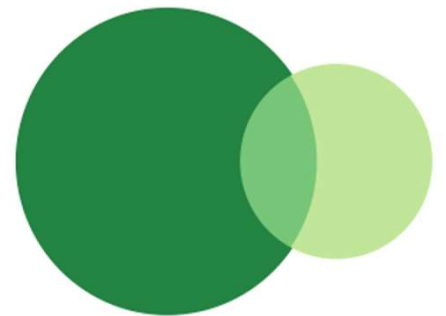
150

Chapel Hill worker inflows/outflows, 2020

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



Inflow/Outflow Job Counts in 2020



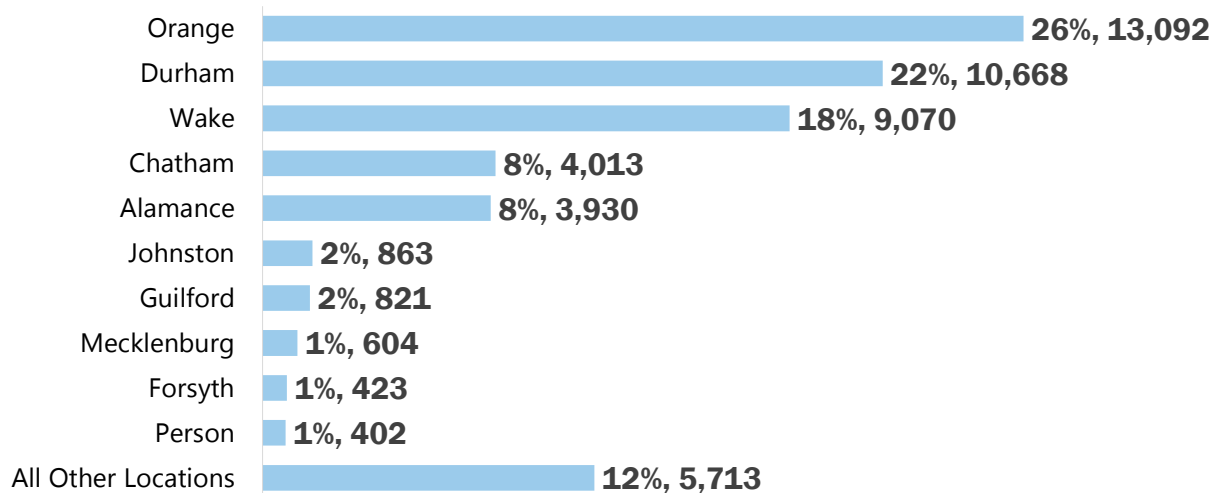
43,662 - Employed in Selection Area, Live Outside
13,875 - Live in Selection Area, Employed Outside
5,937 - Employed and Live in Selection Area

Source: US Census Bureau LODS (OnTheMap)

151

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

Chapel Hill workers by county of residence, 2020

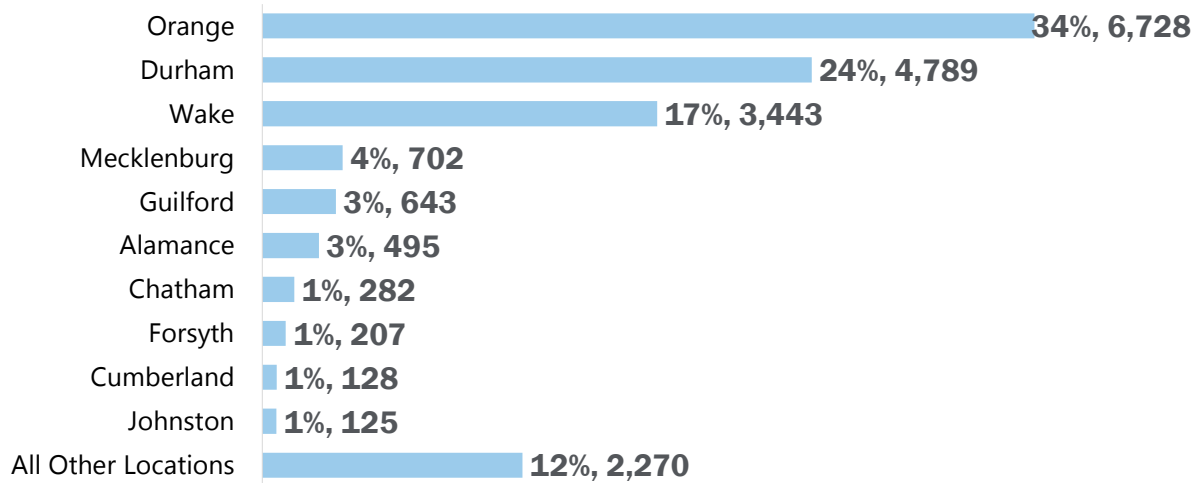


Source: American Community Survey (2017-2021 5-Year Estimates)

152

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

Location of primary job for residents of Chapel Hill, 2020

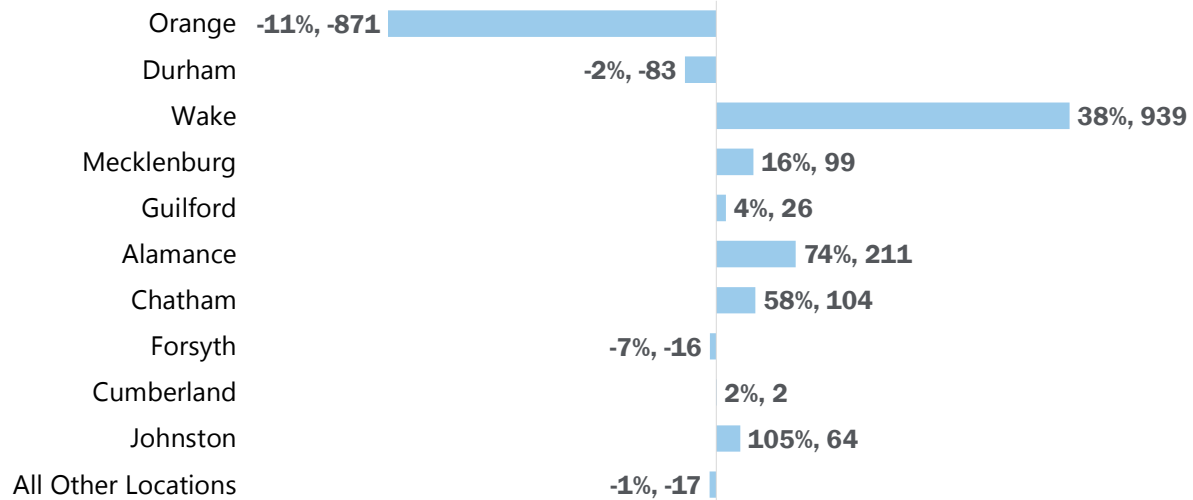


Source: US Census Bureau LODS (OnTheMap)

153

Change in where Chapel Hill residents work

Change in location of Chapel Hill residents' primary job from 2010-2020

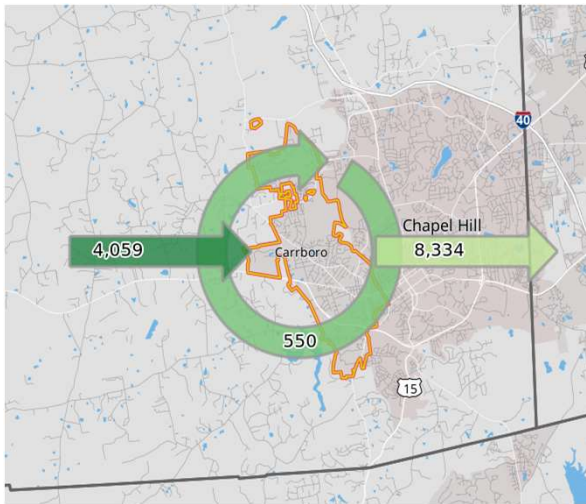


Source: US Census Bureau LODS (OnTheMap)

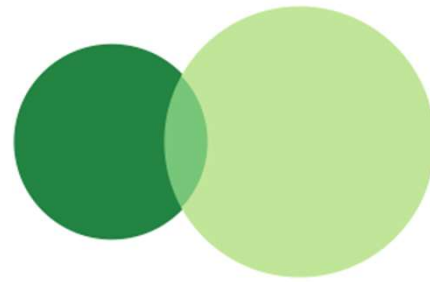
154

Carrboro worker inflows/outflows, 2020

4,059 drive in, 8,334 drive out, and 550 live and work in Carrboro



Inflow/Outflow Job Counts in 2020



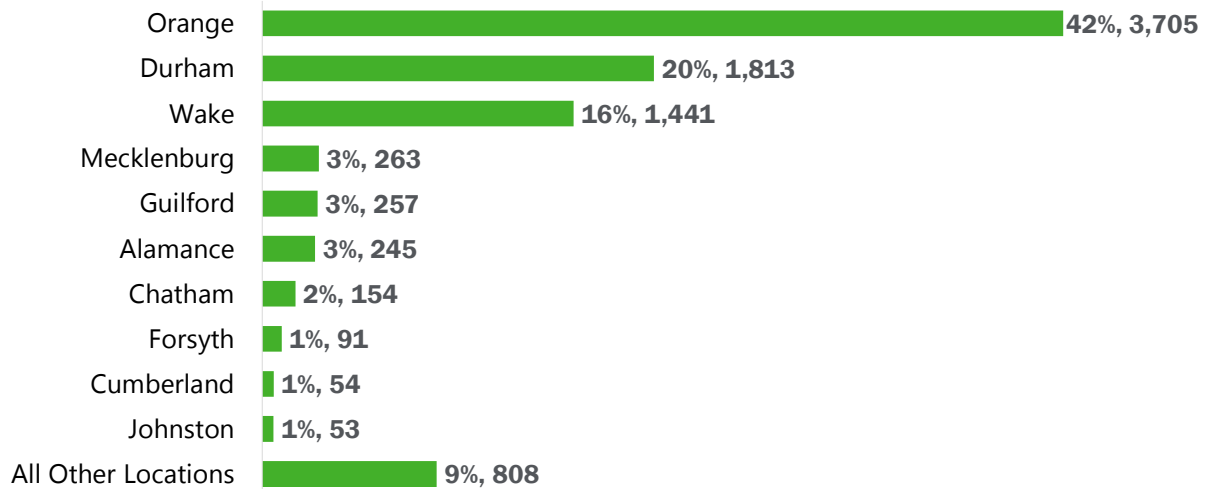
4,059 - Employed in Selection Area, Live Outside
8,334 - Live in Selection Area, Employed Outside
550 - Employed and Live in Selection Area

Source: US Census Bureau LODS (OnTheMap)

155

Where do Carrboro's 8,884 working residents work?

Location of primary job for residents of Carrboro, 2020

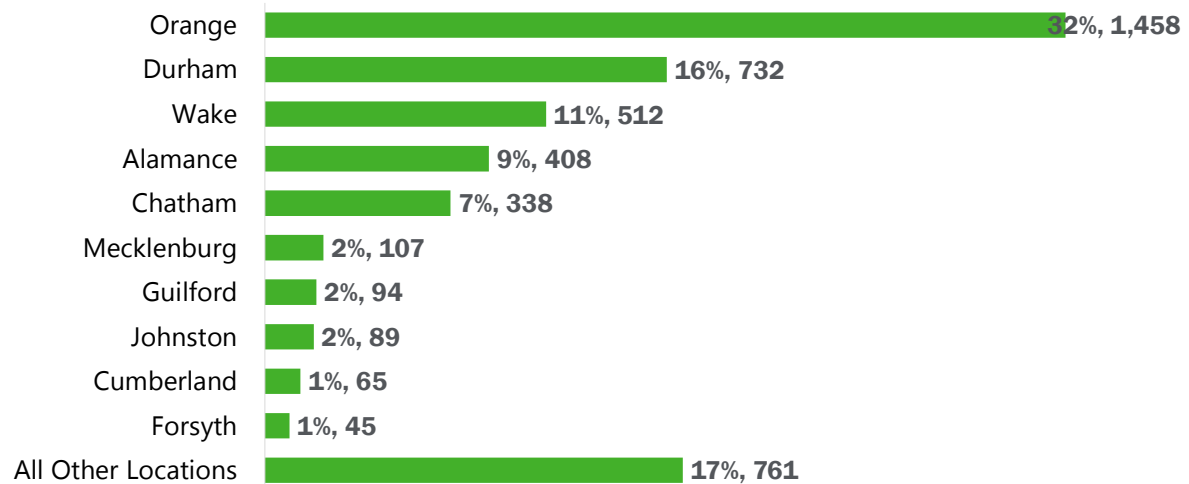


Source: US Census Bureau LODS (OnTheMap)

156

Where do Carrboro's 4,609 workers live?

Carrboro workers by county of residence, 2020

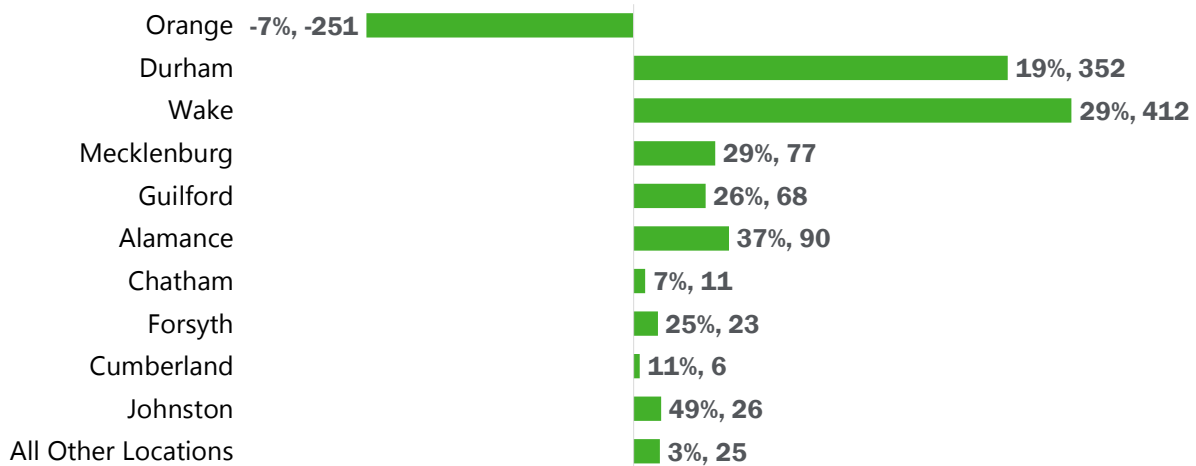


Source: US Census Bureau LODS (OnTheMap)

157

Change in where Carrboro residents work

Change in location of Carrboro residents' primary job from 2010-2020

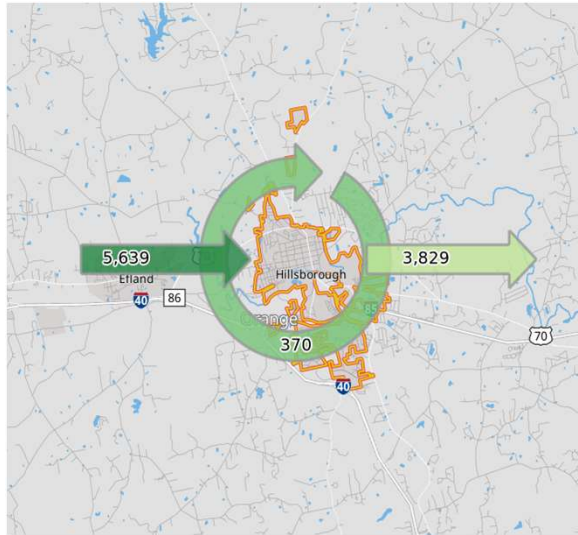


Source: US Census Bureau LODS (OnTheMap)

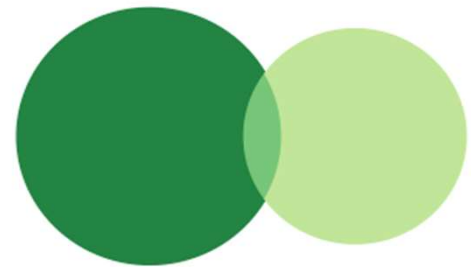
158

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



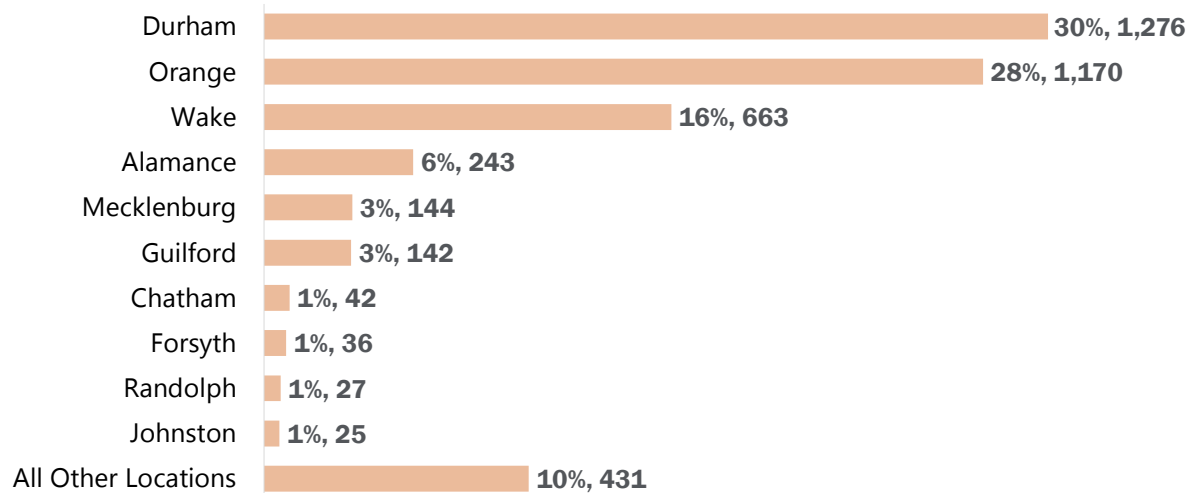
5,639 - Employed in Selection Area, Live Outside
 3,829 - Live in Selection Area, Employed Outside
 370 - Employed and Live in Selection Area

Source: US Census Bureau LODS (OnTheMap)

159

Where do Hillsborough's 4,199 working residents work?

Location of primary job for residents of Hillsborough, 2020

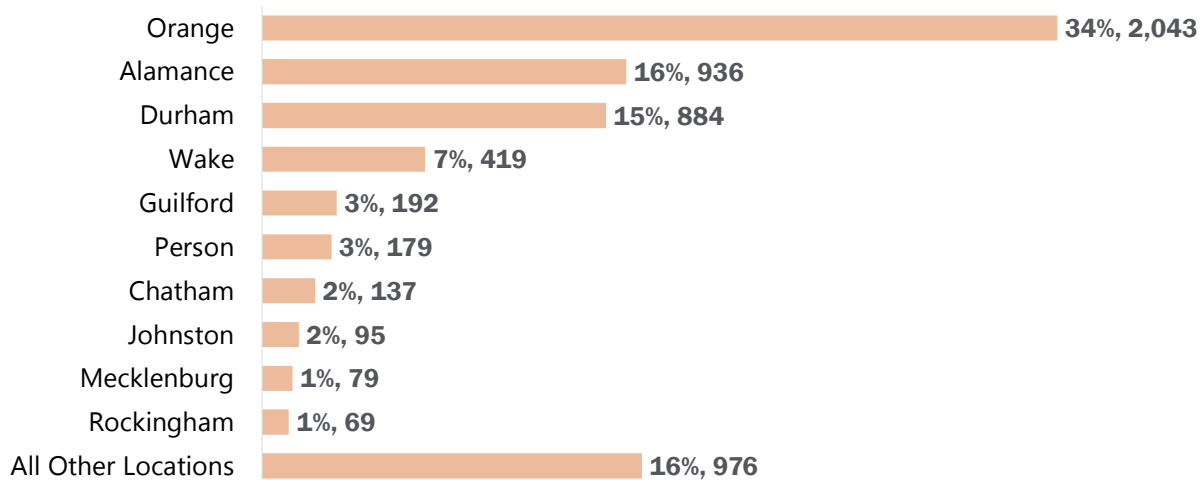


Source: US Census Bureau LODS (OnTheMap)

160

Where do Hillsborough's 6,009 workers live?

Hillsborough workers by county of residence, 2020

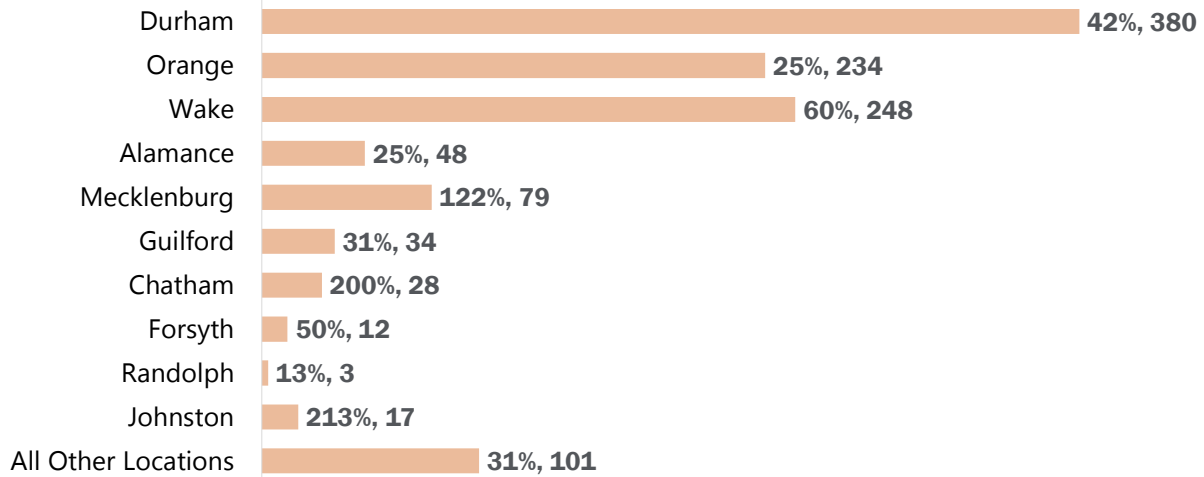


Source: US Census Bureau LODS (OnTheMap)

161

Change in where Hillsborough residents work

Change in location of Hillsborough residents' primary job from 2010 to 2020

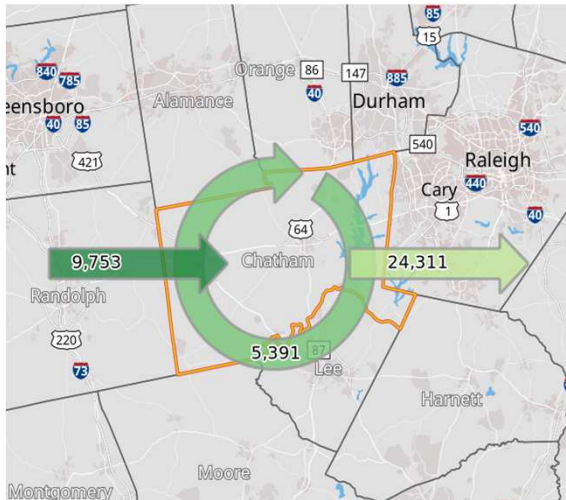


Source: US Census Bureau LODS (OnTheMap)

162

Chatham County worker inflows/outflows, 2020

9,753 drive in, 24,311 drive out, and 5,391 live and work in Chatham



Inflow/Outflow Job Counts in 2020

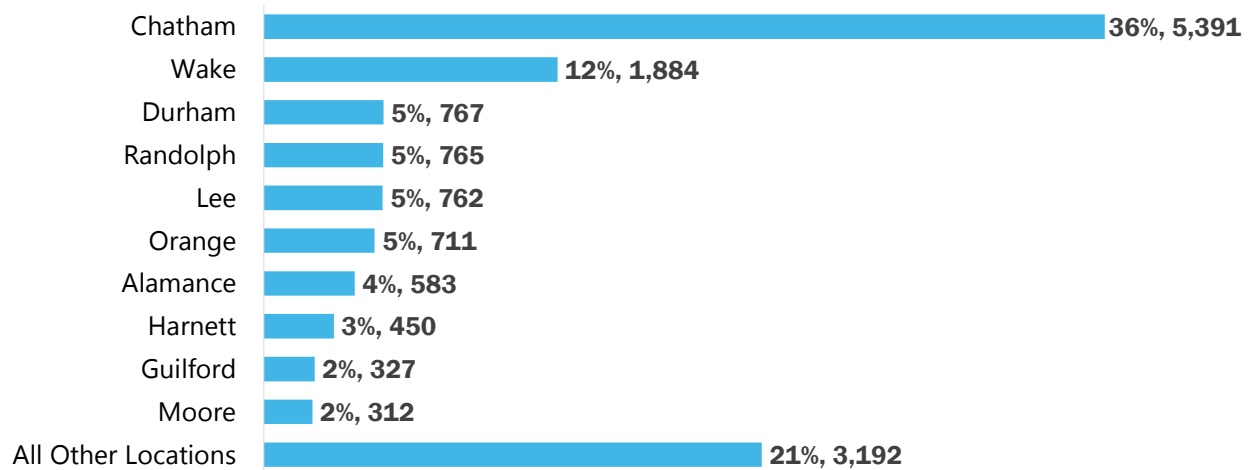


Source: US Census Bureau LODS (OnTheMap)

163

Where do Chatham County's 15,144 workers live?

Chatham County workers by county of residence, 2020

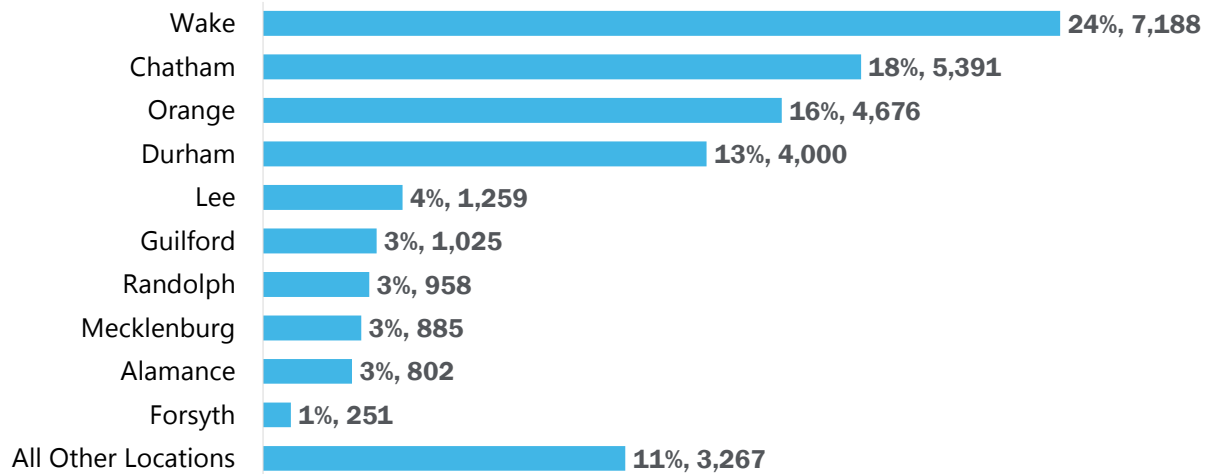


Source: US Census Bureau LODS (OnTheMap)

164

Where do Chatham County's 29,702 working residents work?

Location of primary job for residents of Chatham County, 2020

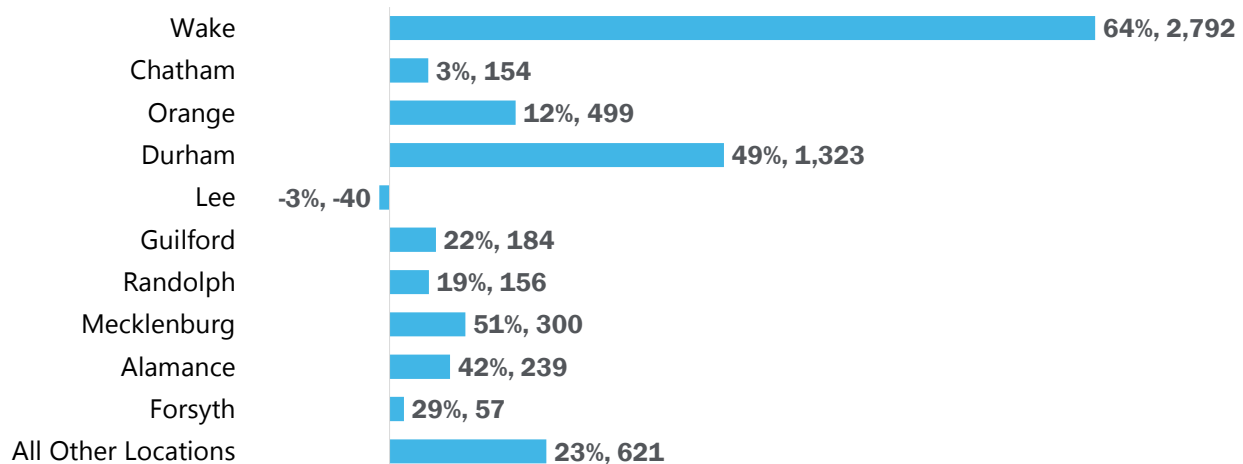


Source: US Census Bureau LODS (OnTheMap)

165

Change in where Chatham residents work

Change in location of Chatham County residents' primary job from 2010-2020

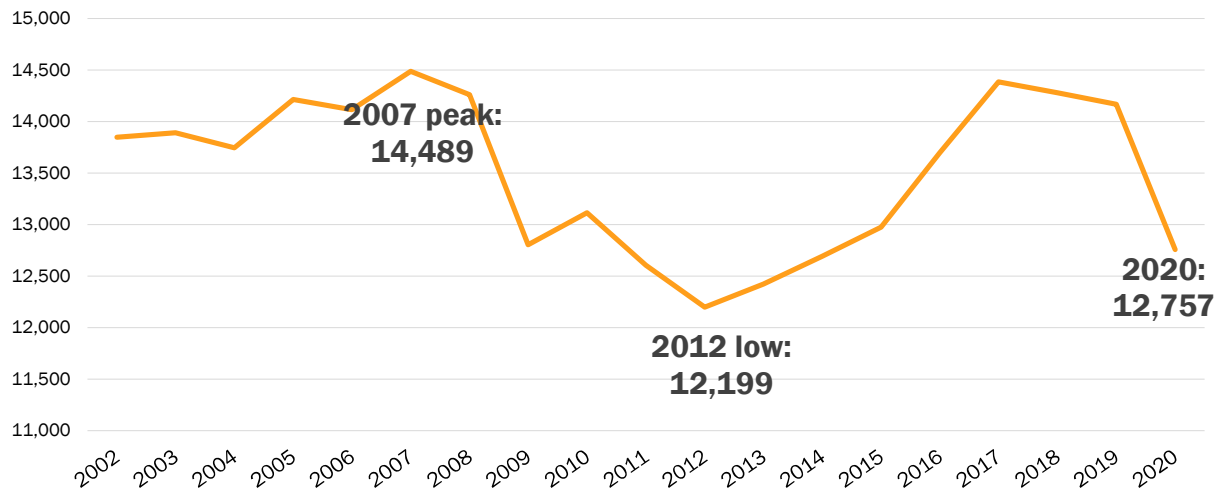


Source: US Census Bureau LODS (OnTheMap)

166

Young workers

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

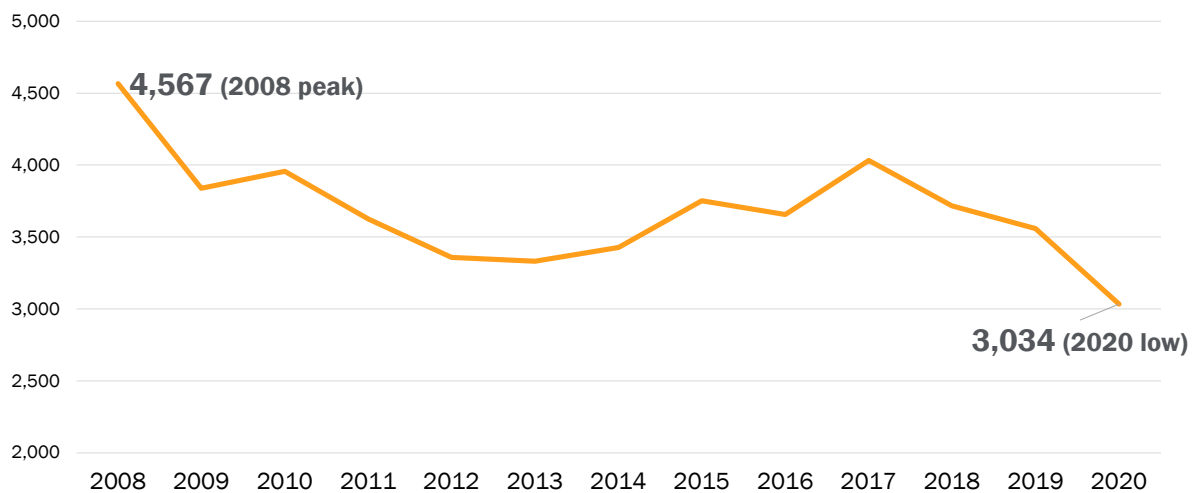


Source: US Census Bureau LODES (OnTheMap)

167

Young workers

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



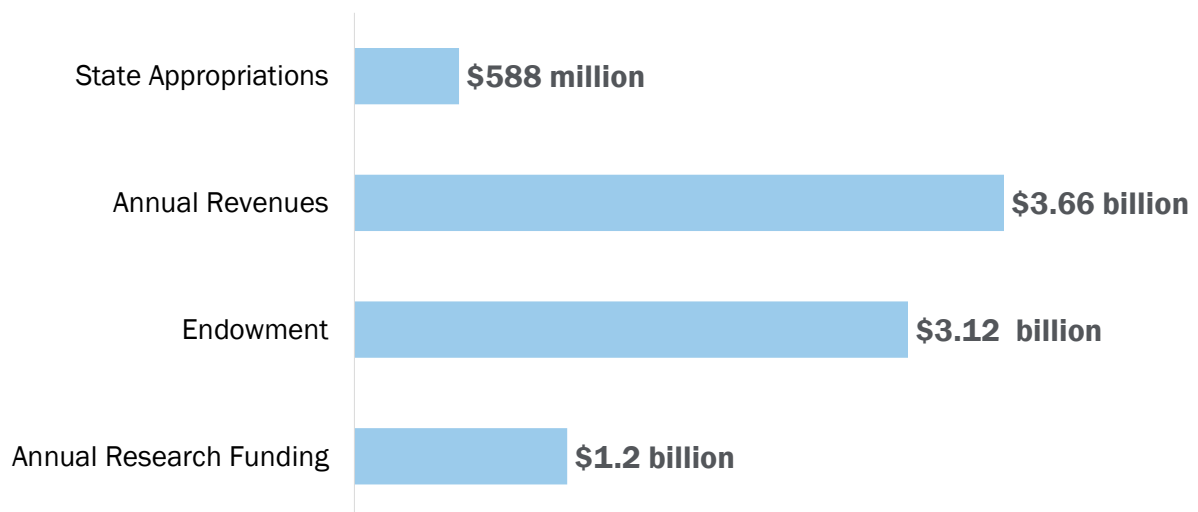
Source: US Census Bureau LODES (OnTheMap)

168

UNC Chapel Hill

169

UNC Chapel Hill by the numbers

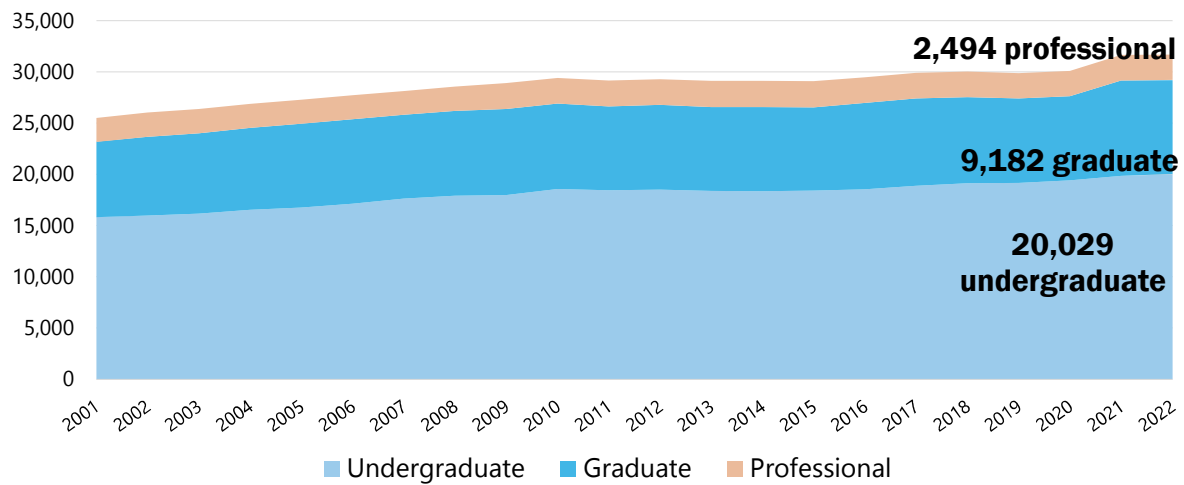


Source: UNC Office of Institutional Research and Analysis (OIRA)

170

UNC Chapel Hill's 31,705 students by type

Total student population in 2022

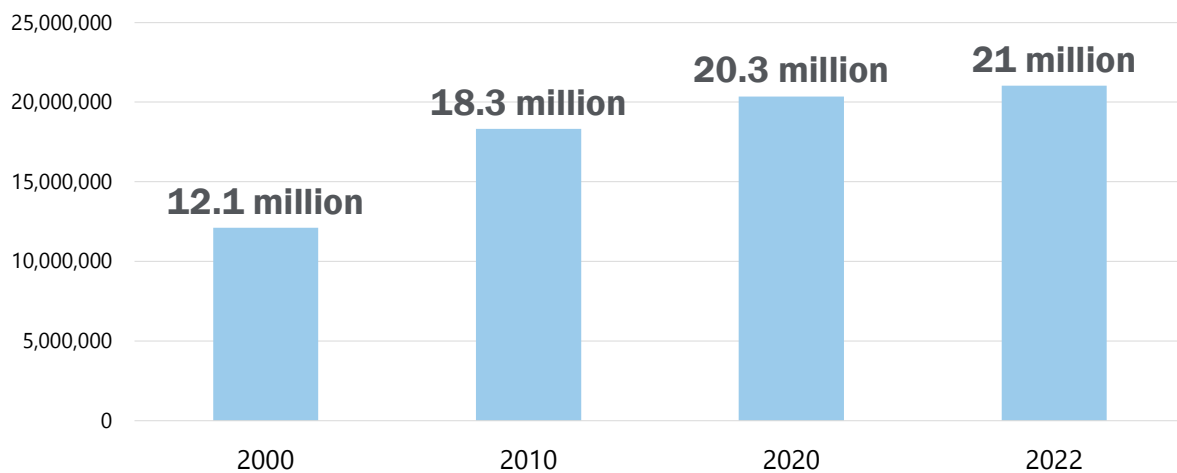


Source: UNC Office of Institutional Research and Analysis (OIRA)

171

UNC Chapel Hill Campus exceeds 21 million sq ft in 2022

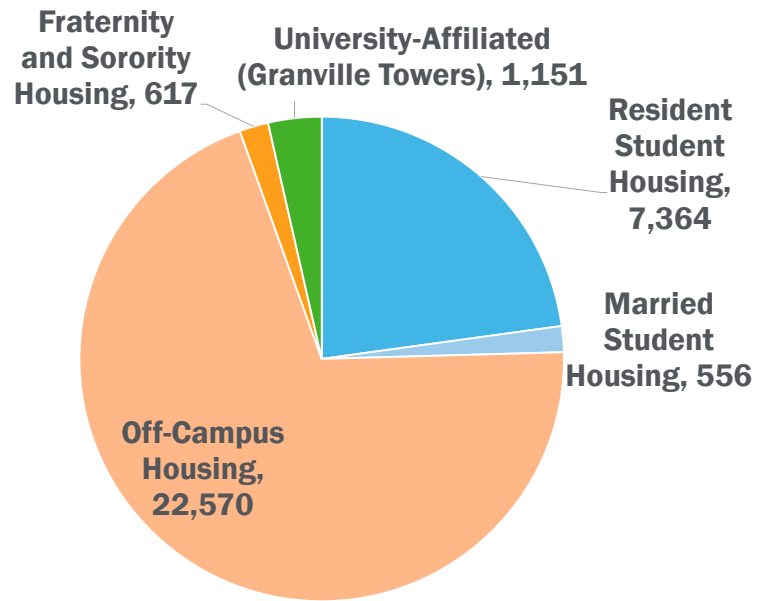
UNC Chapel Hill campus facilities 2000, 2010, 2020, 2022



Source: UNC Office of Institutional Research and Analysis (OIRA)

172

UNC Chapel Hill student enrollment by housing type



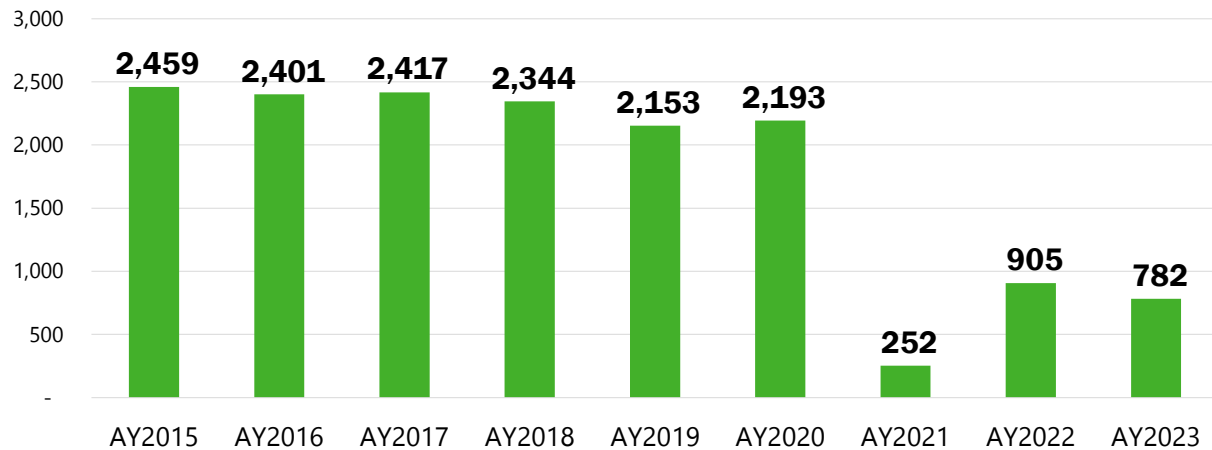
Source: UNC Office of Institutional Research and Analysis (OIRA)

173

Durham Tech

174

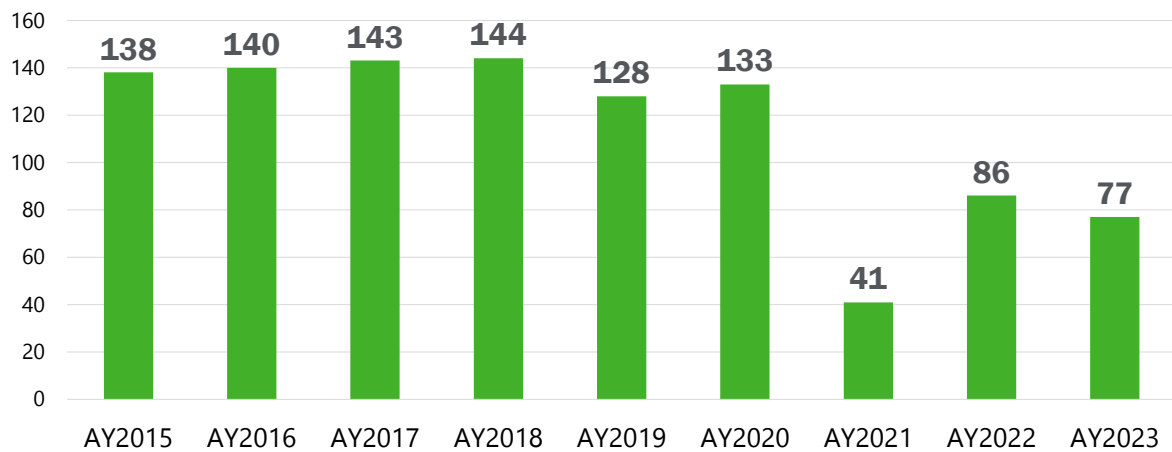
Durham Tech Orange County Campus in-person for-credit class enrollment



Source: Durham Tech

175

Durham Tech Orange County Campus in-person credit classes offered

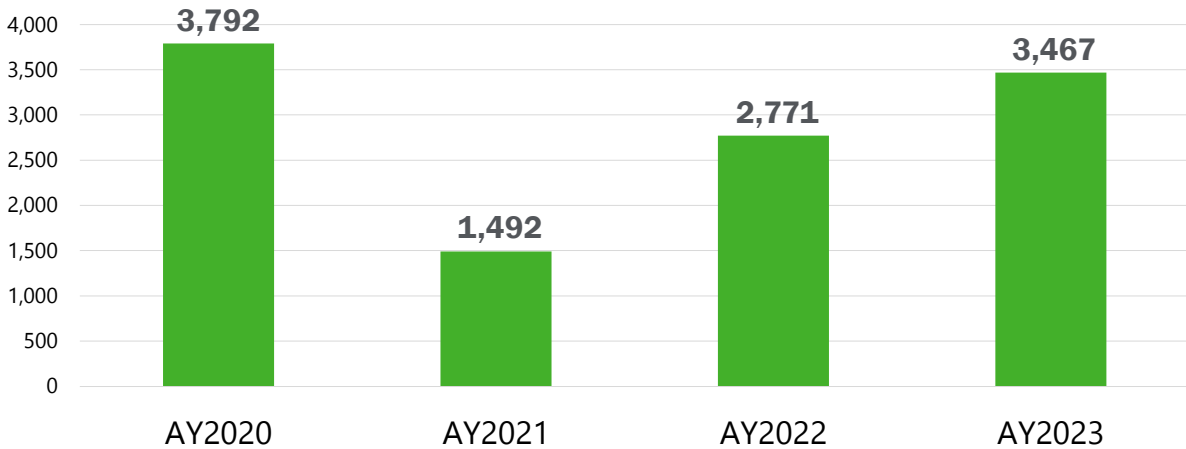


Source: Durham Tech

176

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

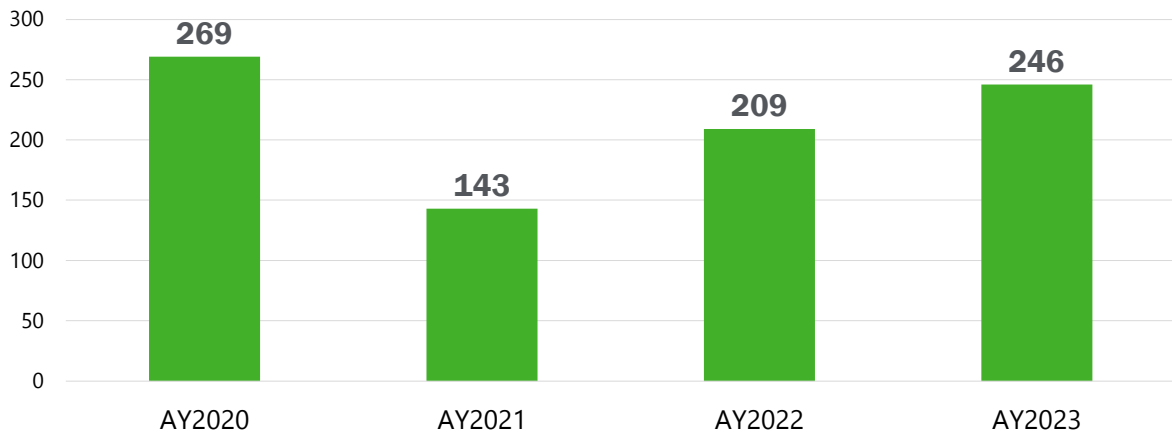
Total Durham Tech Orange County Campus in-person continuing education (noncredit) seats used



Source: Durham Tech

177

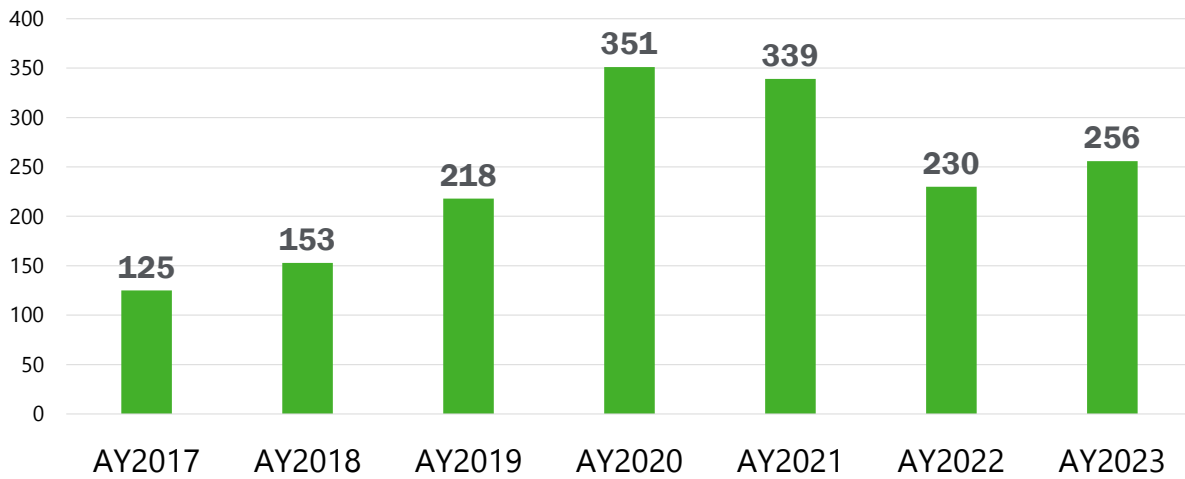
Durham Tech Orange County Campus in-person continuing education (noncredit) classes offered



Source: Durham Tech

178

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

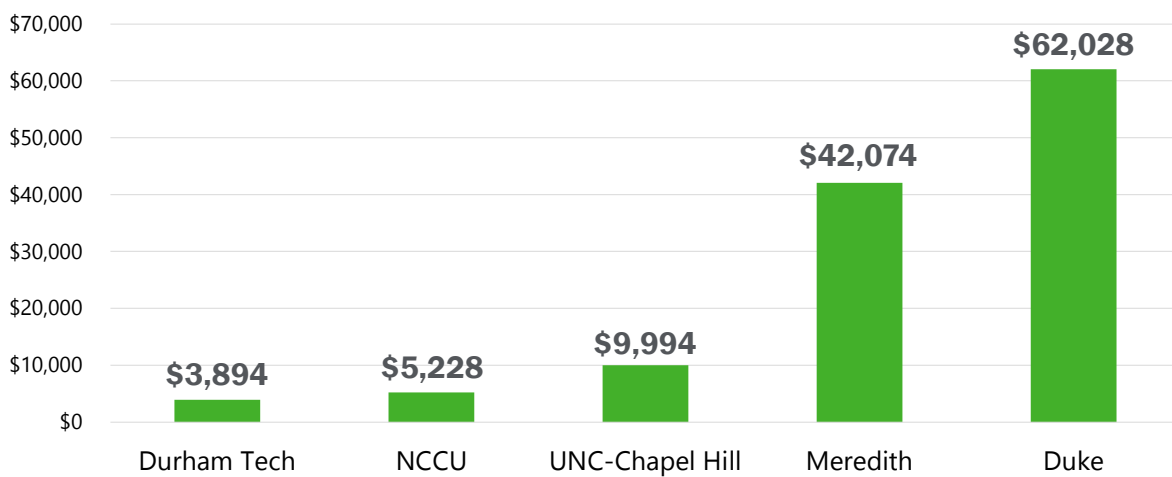


Source: Durham Tech

179

Comparing cost of local higher education options

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

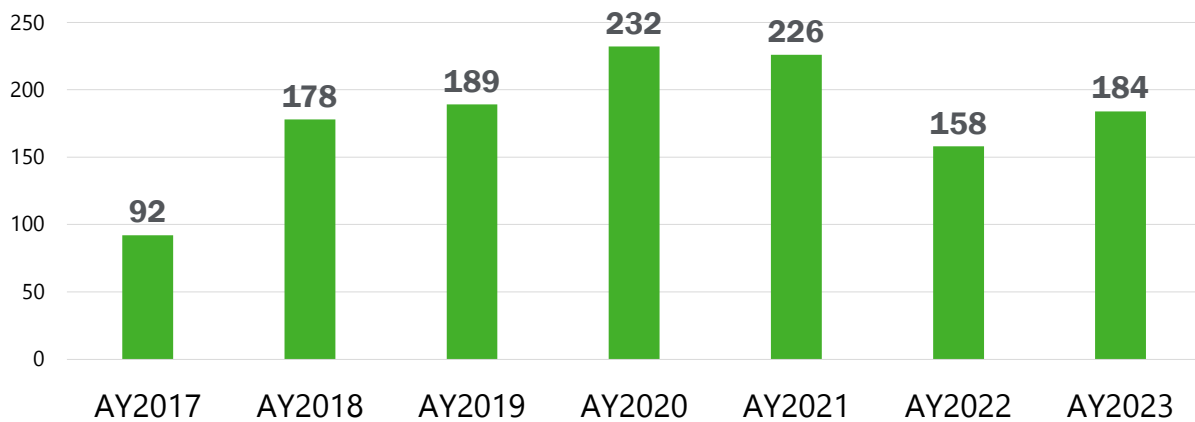


Source: Durham Tech

180

Orange Promise students taking classes at Durham Tech

Orange Promise gives eligible graduates of high schools in Orange County \$500 per semester to offset Durham Tech tuition costs.



Source: Durham Tech

181

Health Indicators

182

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

County rank out of NC's 100 counties

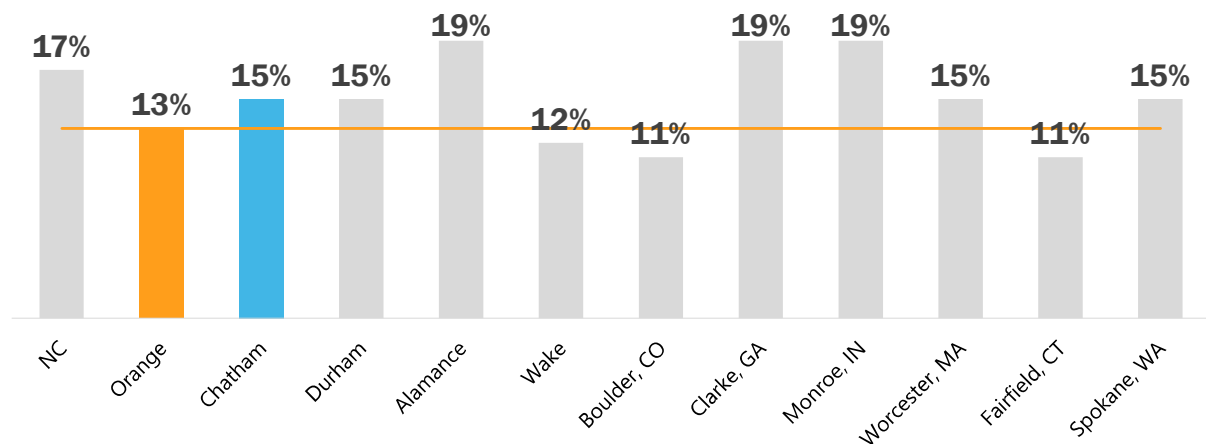
	Orange	Chatham	Durham	Who is #1
Length of Life	2	14	7	Wake
Quality of Life	3	11	19	Wake
Health Behaviors	1	4	12	Orange
Clinical Care	1	5	6	Orange
Social and Economic Factors	1	18	13	Orange
Physical Environment	7	28	20	New Hanover

Source: 2023 Robert Wood Johnson Foundation Health Rankings

183

Adult smoking

Percentage of adults who are current smokers



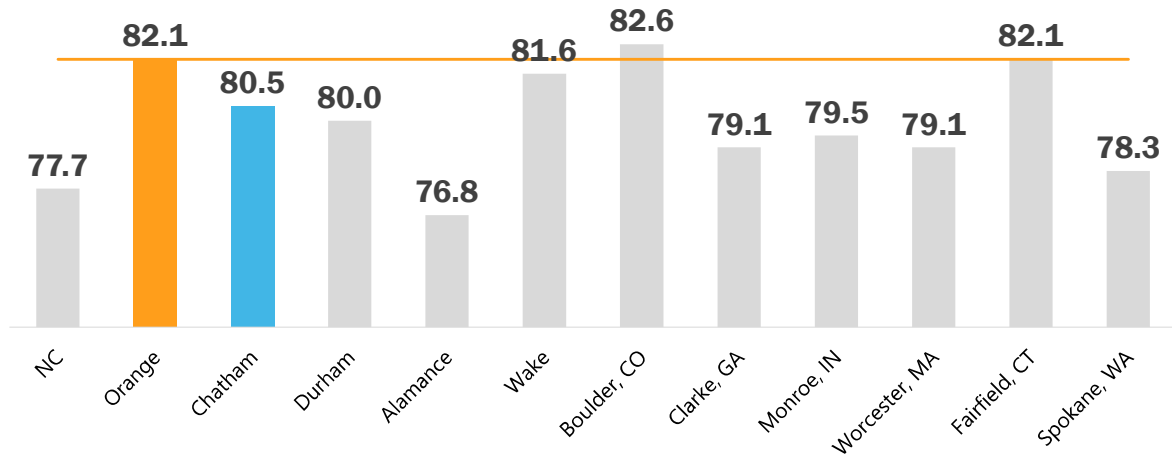
Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2023 Robert Wood Johnson Foundation Health Rankings

184

Life expectancy

Average number of years a person can expect to live



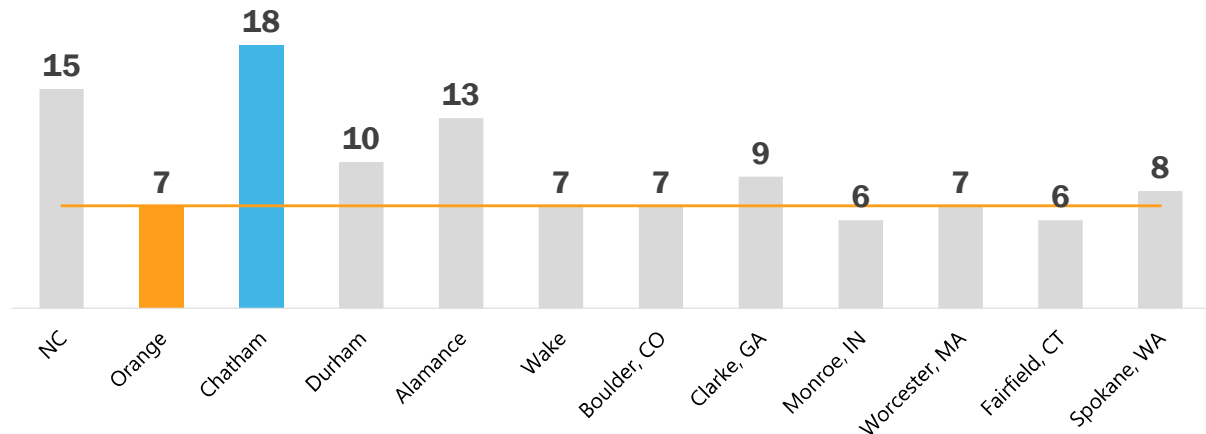
Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2023 Robert Wood Johnson Foundation Health Rankings

185

Motor vehicle crash deaths

Number of motor vehicle crash deaths per 100,000 population



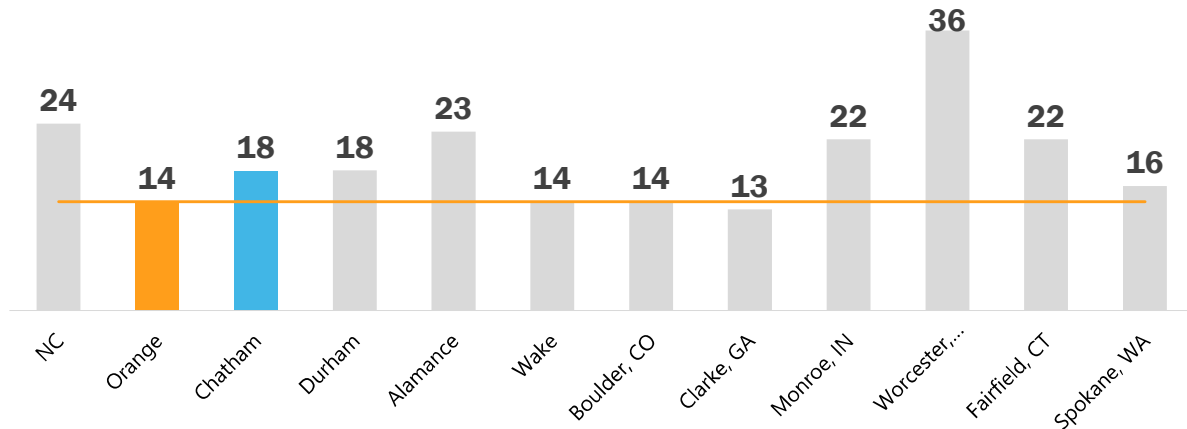
Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2023 Robert Wood Johnson Foundation Health Rankings

186

Drug overdose deaths

Number of drug poisoning deaths per 100,000 population



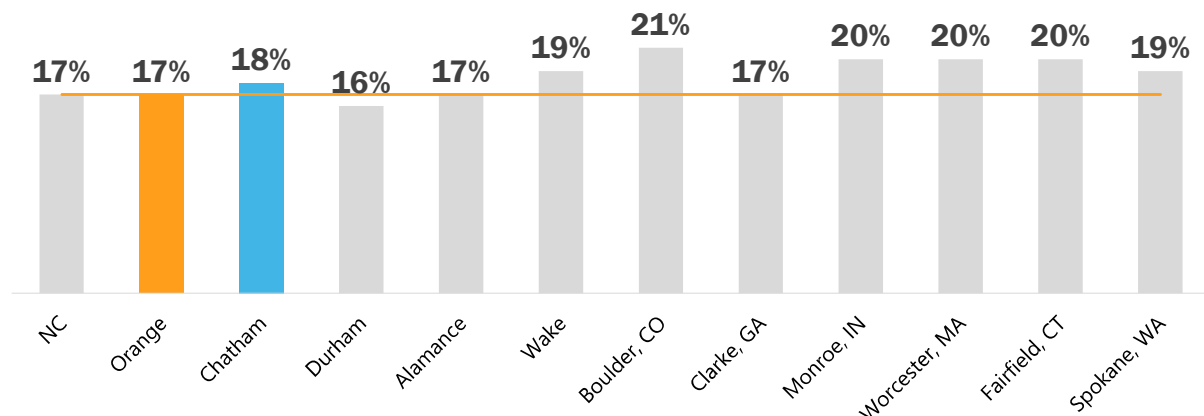
Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2023 Robert Wood Johnson Foundation Health Rankings

187

Excessive drinking

Percentage of adults who report binge or heavy drinking



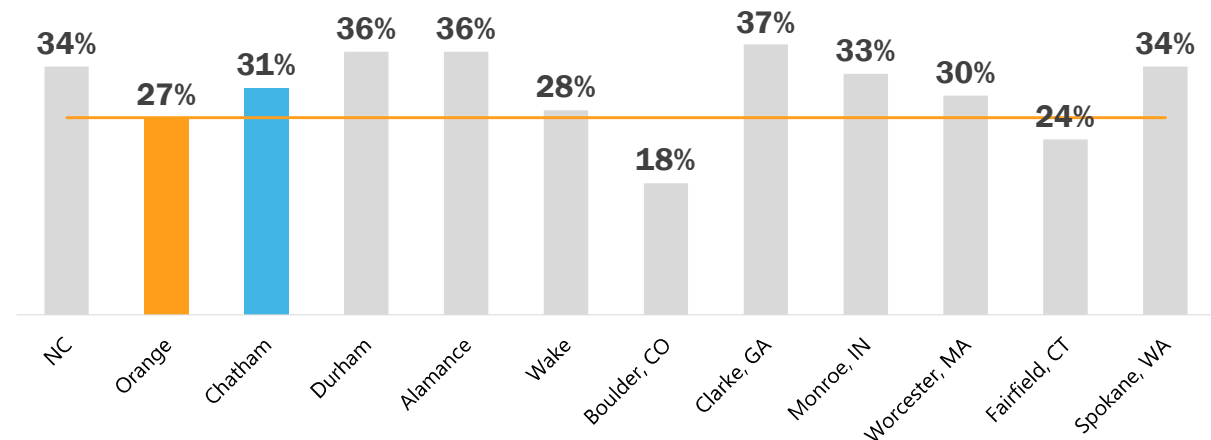
Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2023 Robert Wood Johnson Foundation Health Rankings

188

Adults with obesity

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



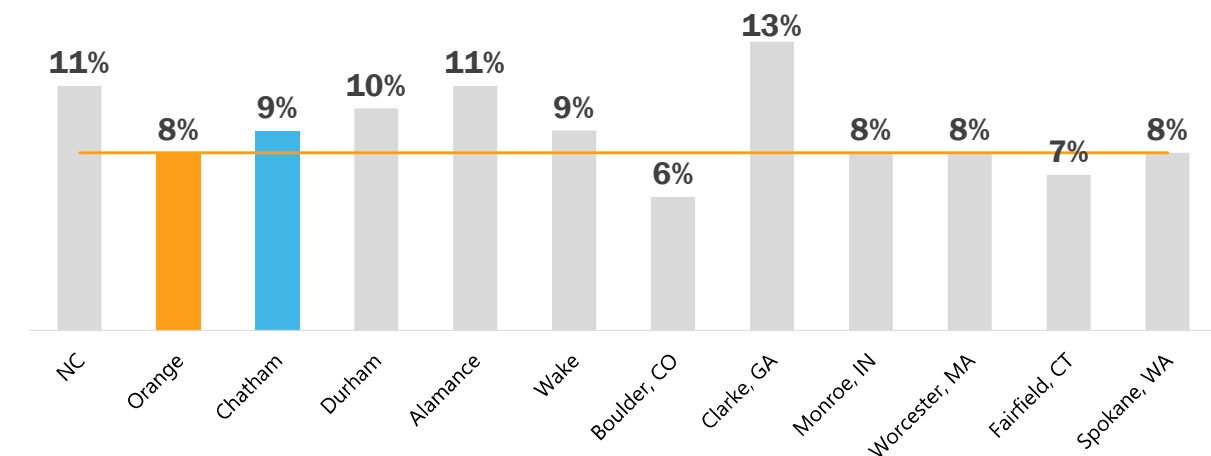
Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2023 Robert Wood Johnson Foundation Health Rankings

189

Diabetes prevalence

Percentage of adults (20+) with diagnosed diabetes



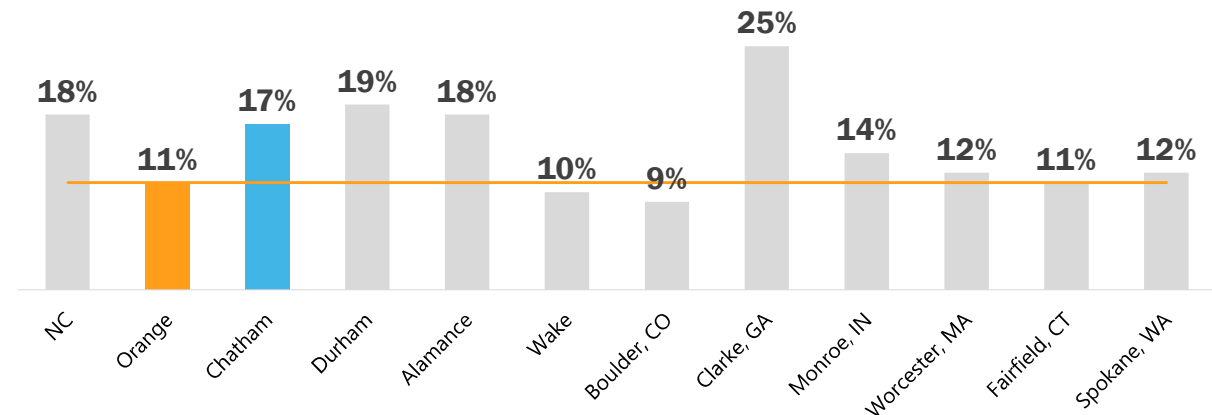
Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2023 Robert Wood Johnson Foundation Health Rankings

190

Children in poverty

Percent of people under the age of 18 living in poverty



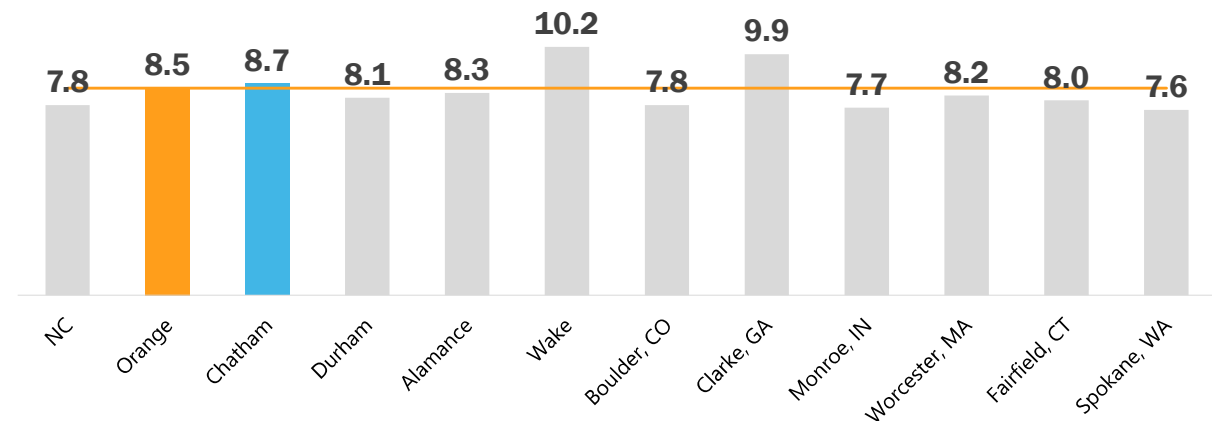
Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2023 Robert Wood Johnson Foundation Health Rankings

191

Air pollution: particulate matter

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



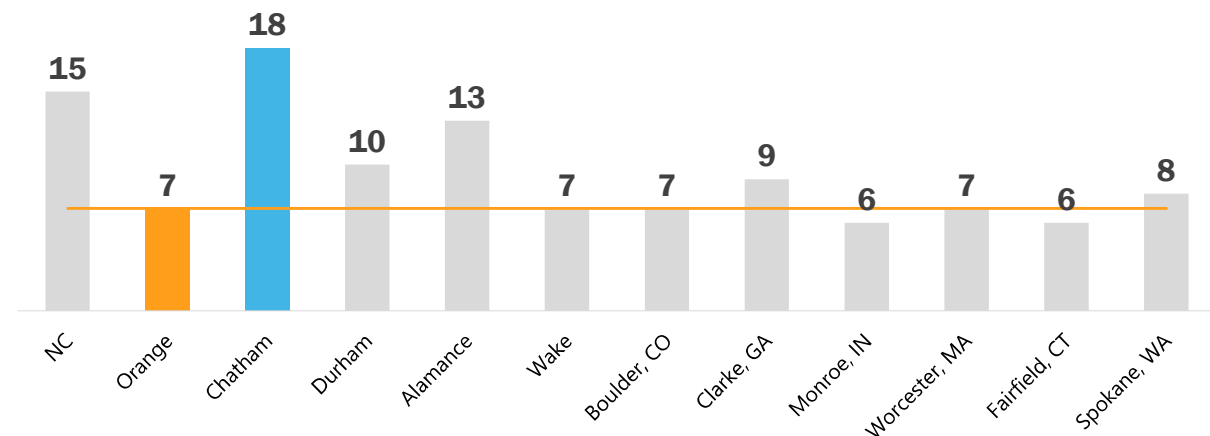
Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2023 Robert Wood Johnson Foundation Health Rankings

192

Motor vehicle crash deaths

Number of motor vehicle crash deaths per 100,000 population



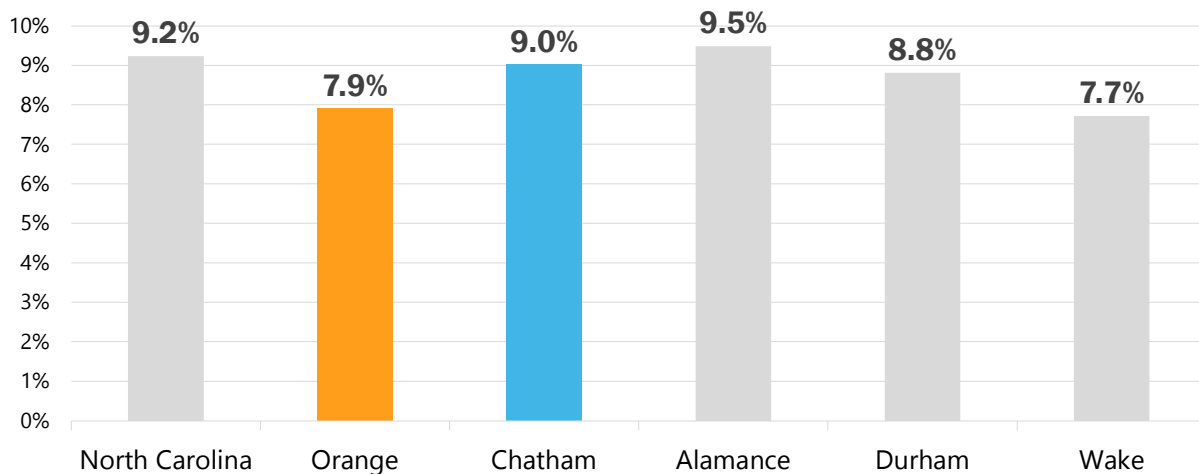
Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2023 Robert Wood Johnson Foundation Health Rankings

193

Percent of births with low birthweight

Low birthweight is considered <5.5lbs

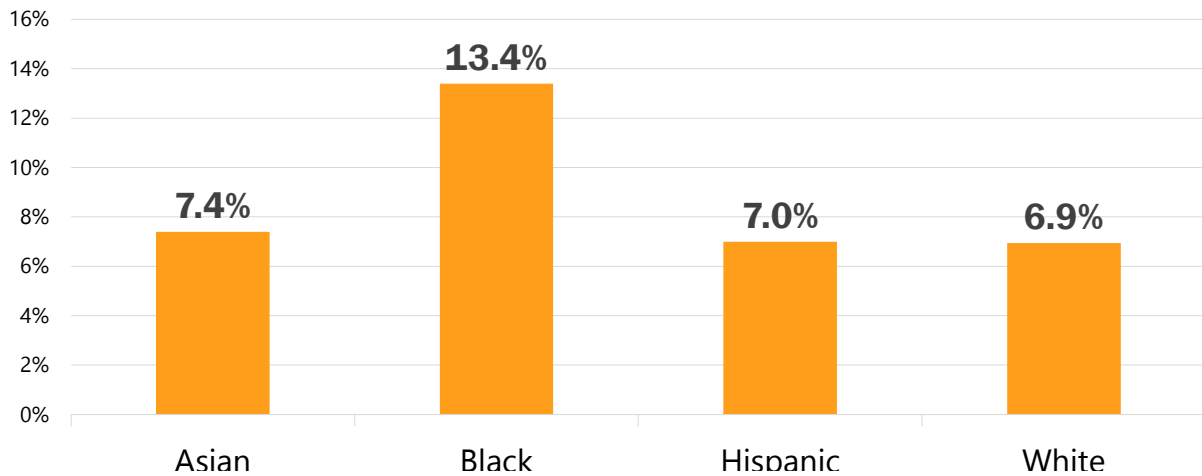


Source: 2023 Robert Wood Johnson Foundation Health Rankings

194

Percent of births with low birthweight by race/ethnicity in Orange County

Low birthweight is considered <5.5lbs

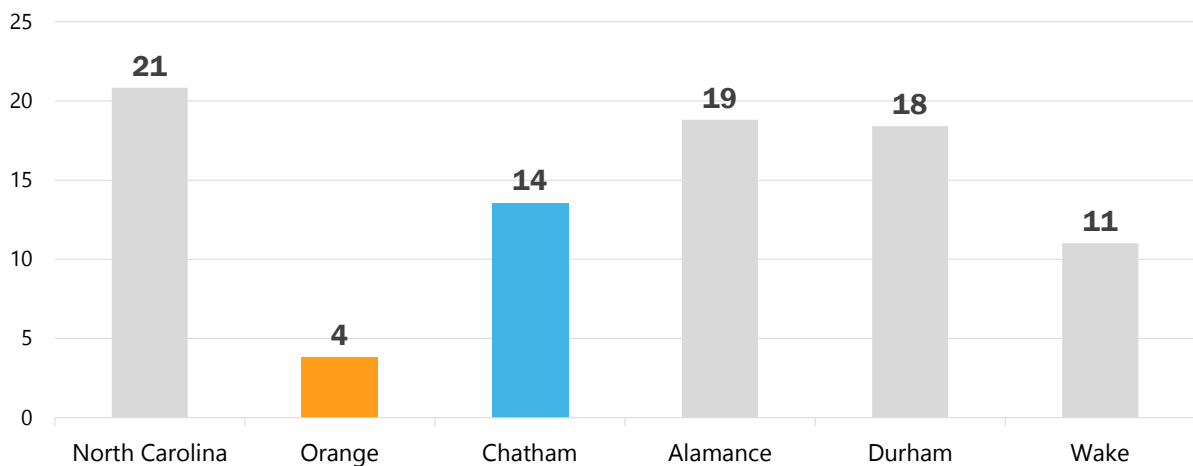


Source: 2023 Robert Wood Johnson Foundation Health Rankings

195

Teen birth rate

Births per 1,000 females ages 15-19

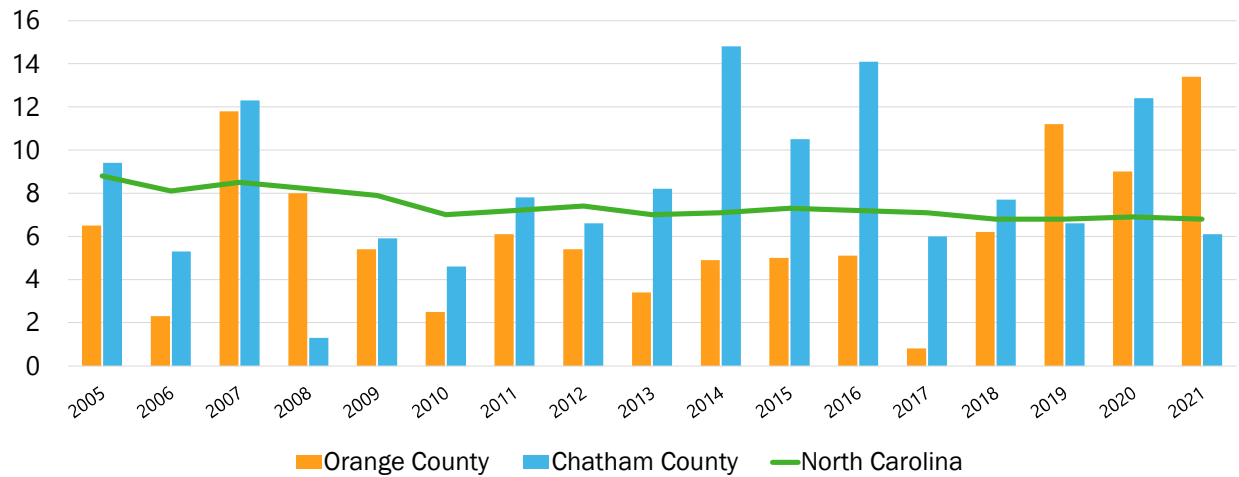


Source: 2023 Robert Wood Johnson Foundation Health Rankings

196

Infant mortality rate

Number of infant deaths (less than 1 year) per 1,000 live births

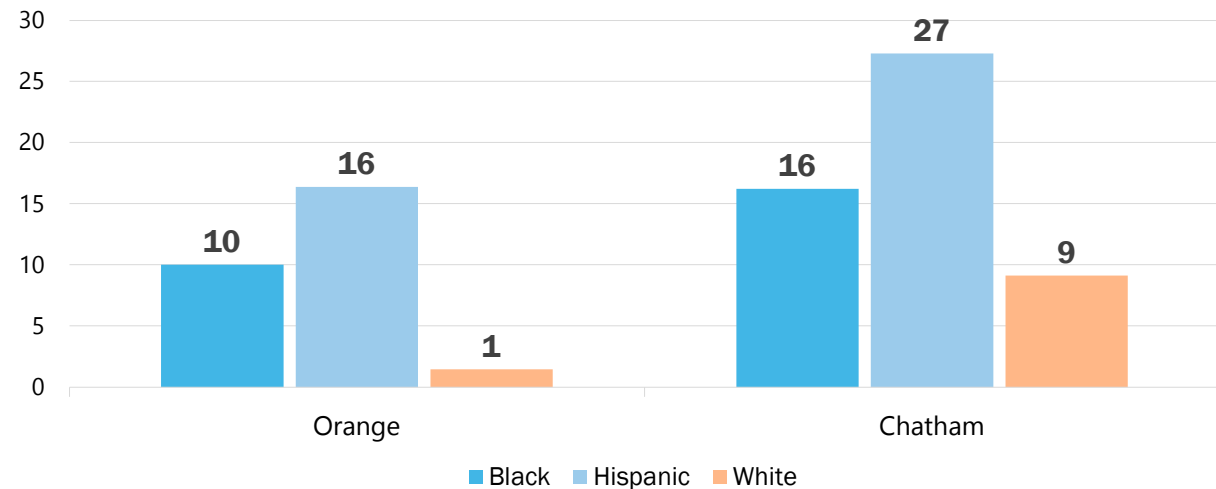


Source: NC State Center for Health Statistics

197

Teenage birth rate

Births per 1,000 females ages 15-19 by race/ethnicity

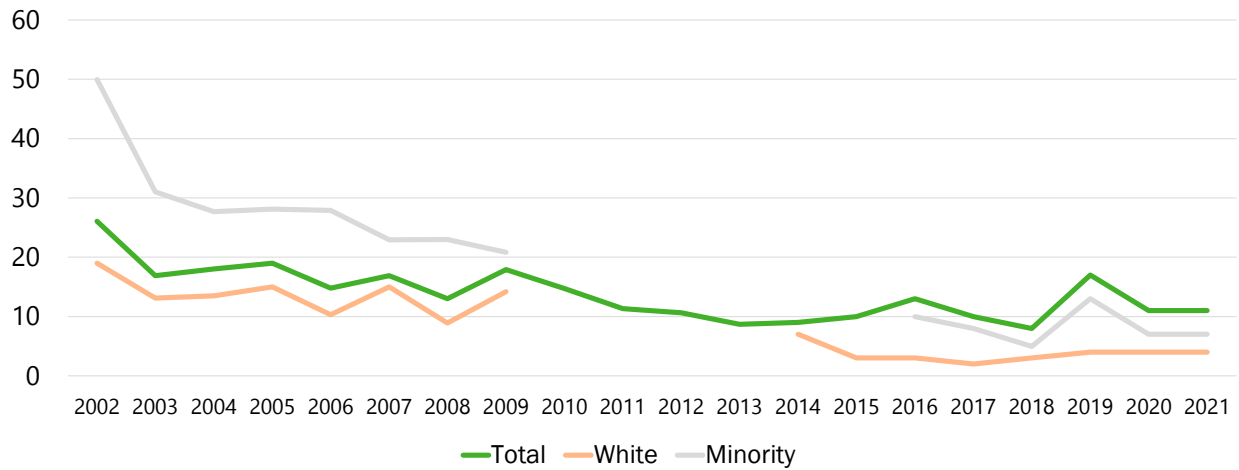


Source: 2023 Robert Wood Johnson Foundation Health Rankings

198

Orange County teenage pregnancy rate

Pregnancies per 100,00 females ages 15-17, 2002 - 2021

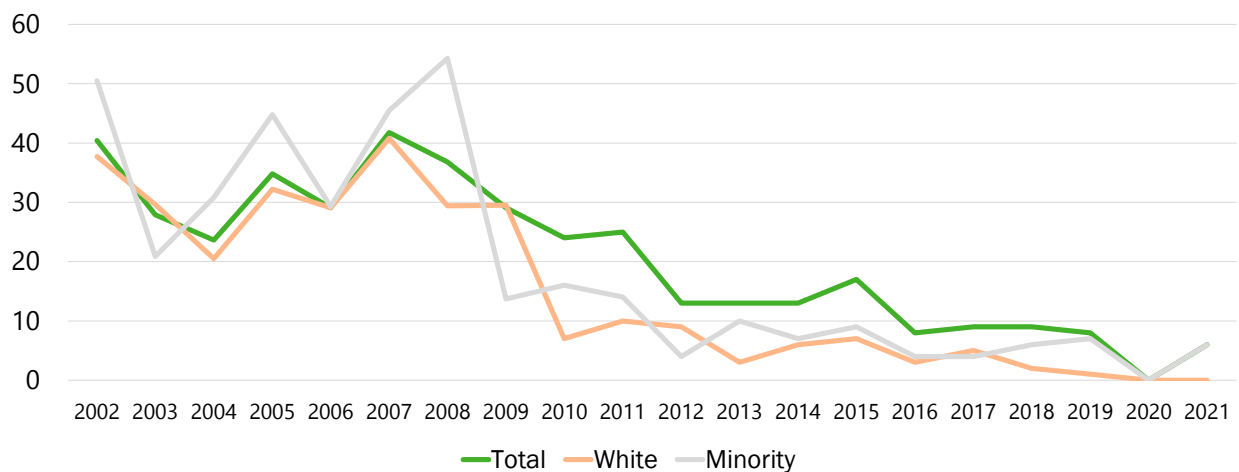


Source: NC State Center for Health Statistics

199

Chatham County teenage pregnancy rate

Pregnancies per 100,00 females ages 15-17, 2002 - 2021

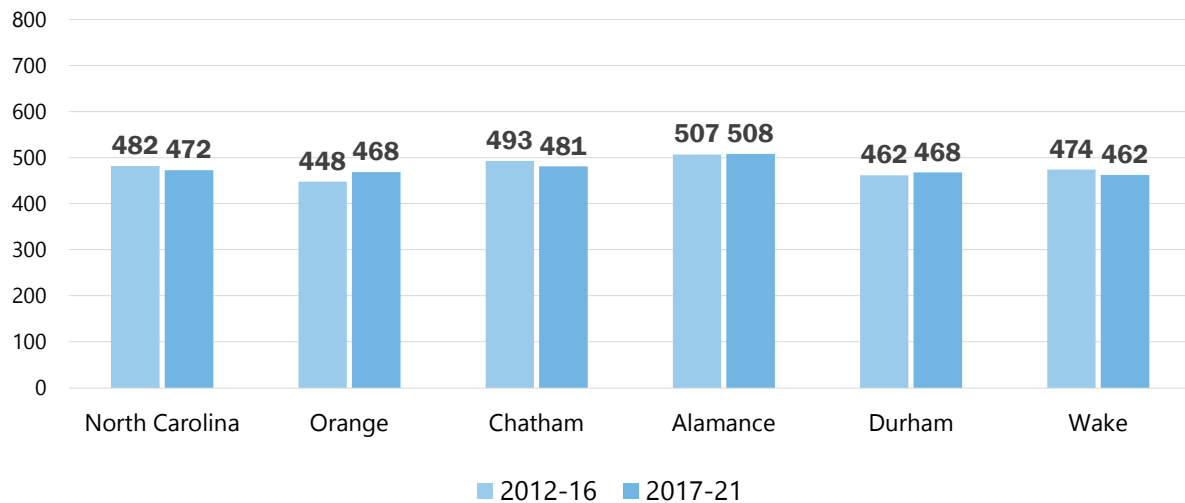


Source: NC State Center for Health Statistics

200

Total cancer rates

Cancer cases per 100,000 (2012-2016 vs. 2017-2021)

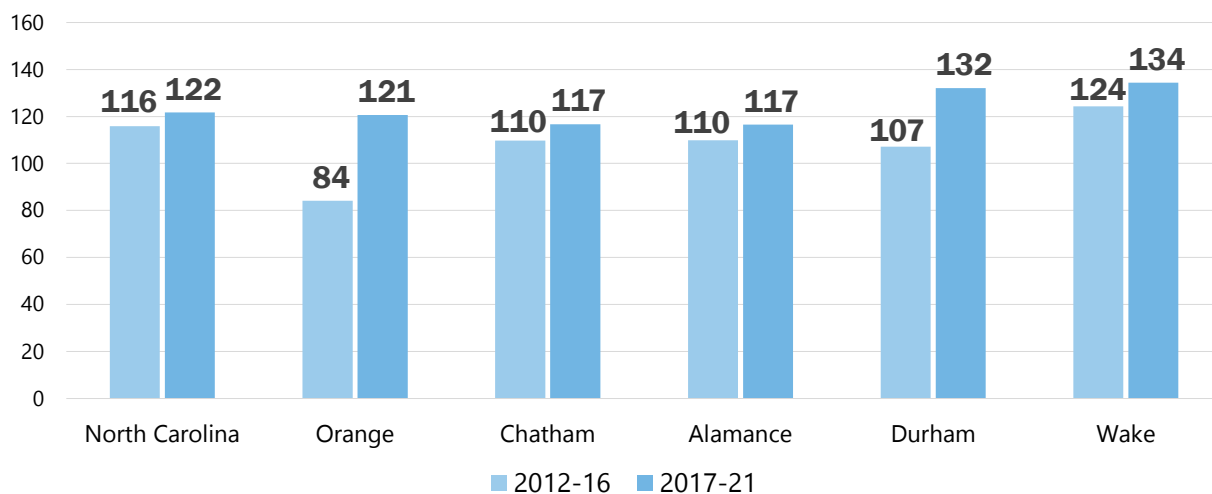


Source: NC State Center for Health Statistics

201

Prostate cancer

Prostate cancer cases per 100,000 (2012-2016 vs. 2017-2021)

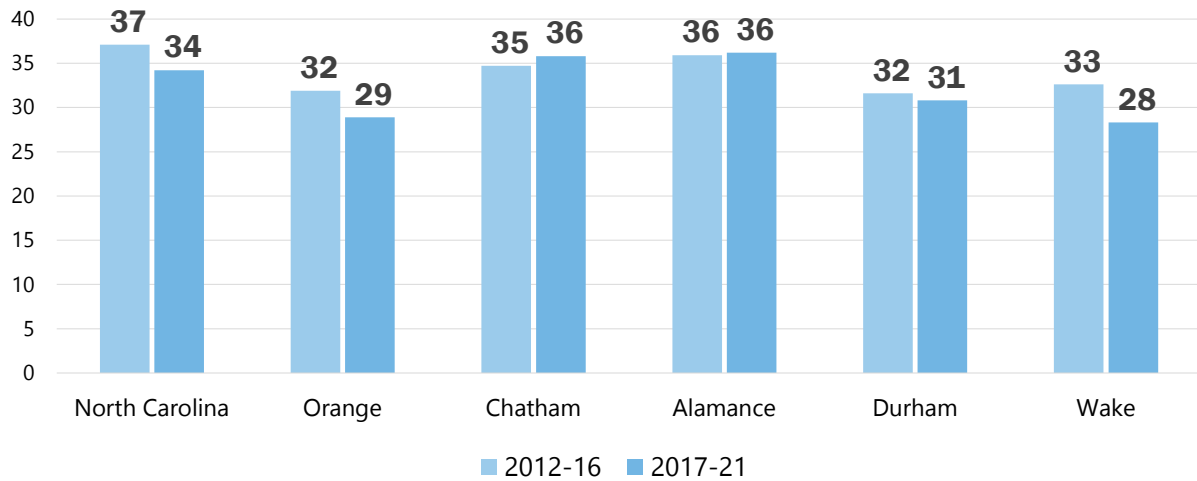


Source: NC State Center for Health Statistics

202

Colon/rectum cancer

Colon/rectum cancer cases per 100,000 (2012-2016 vs. 2017-2021)

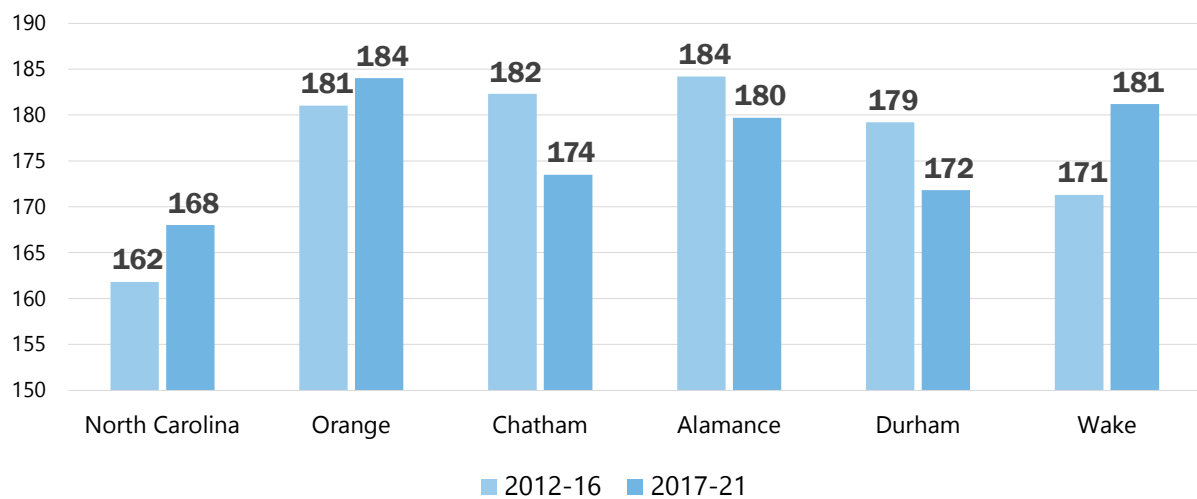


Source: NC State Center for Health Statistics

203

Female breast cancer

Female breast cancer cases per 100,000 (2012-2016 vs. 2017-2021)

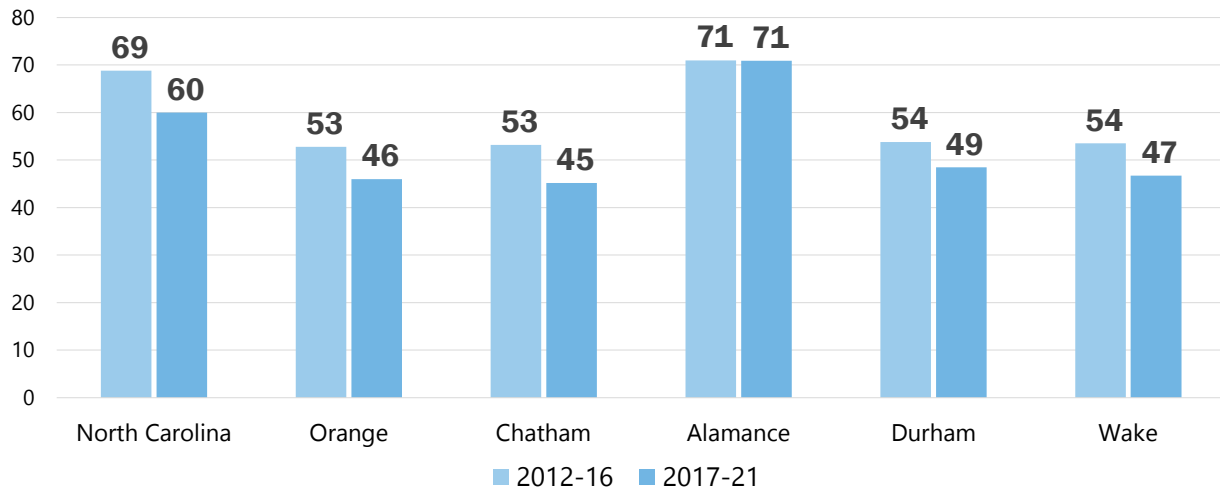


Source: NC State Center for Health Statistics

204

Lung/bronchus cancer

Lung/bronchus cancer cases per 100,000 (2012-2016 vs. 2017-2021)

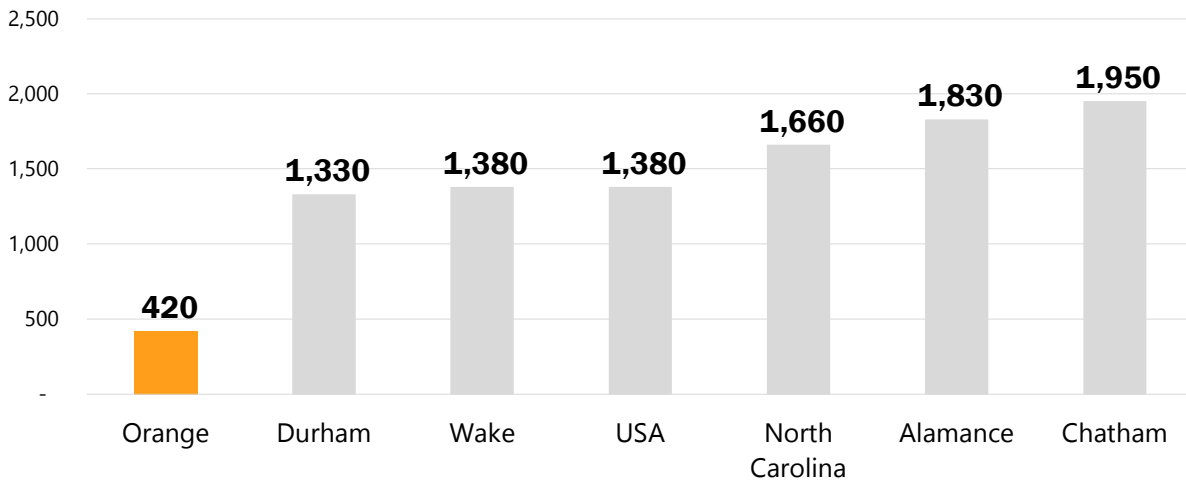


Source: NC State Center for Health Statistics

205

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

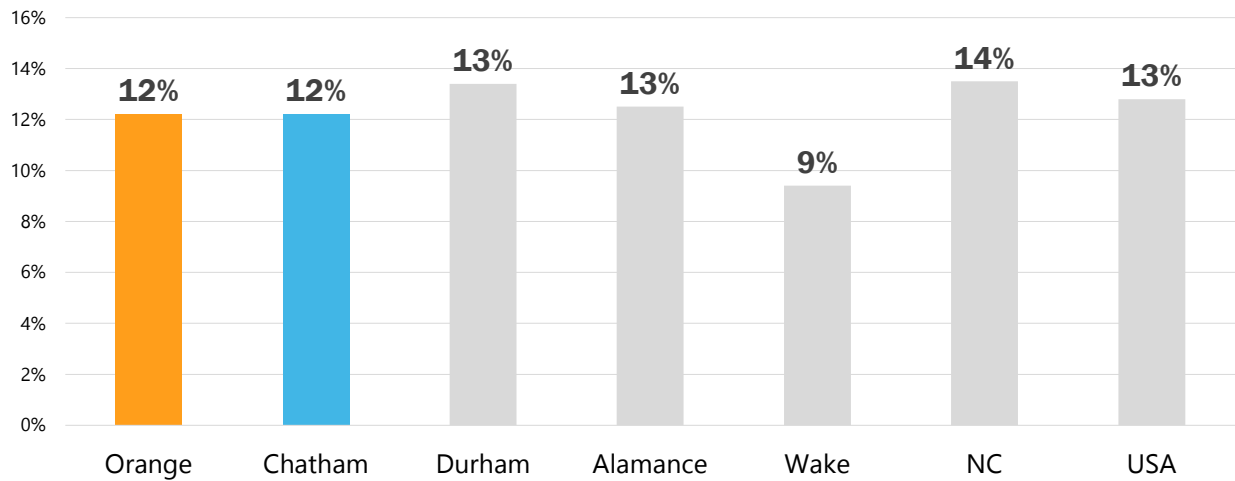
206

Poverty & Food Insecurity

207

Poverty rate

Percent of people (all ages) in poverty, 2021

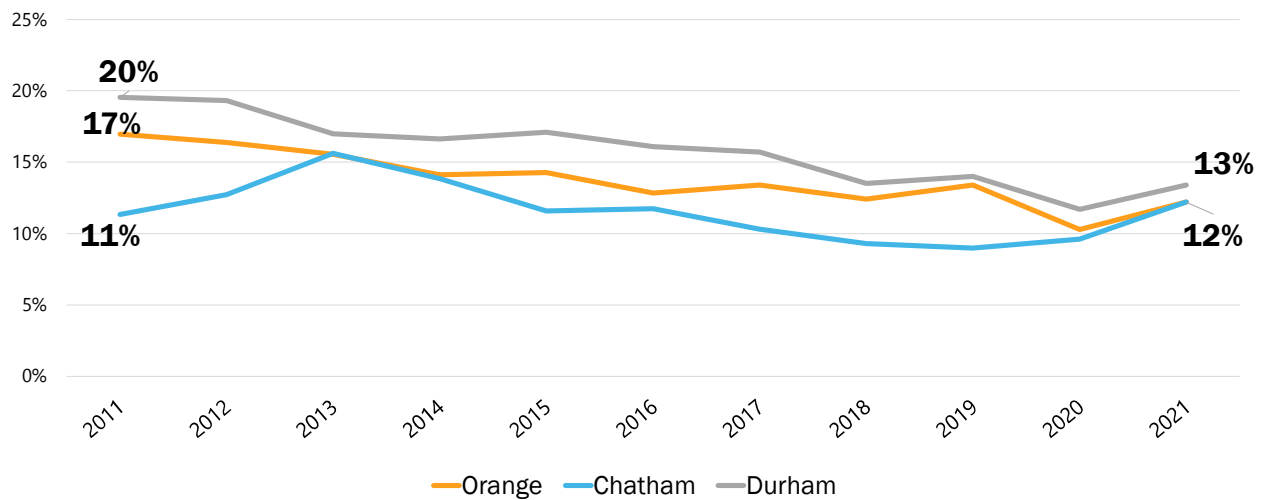


Source: US Census Bureau Small Area Income and Poverty Estimates (SAIPE)

208

Local poverty rates are declining over the decade

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

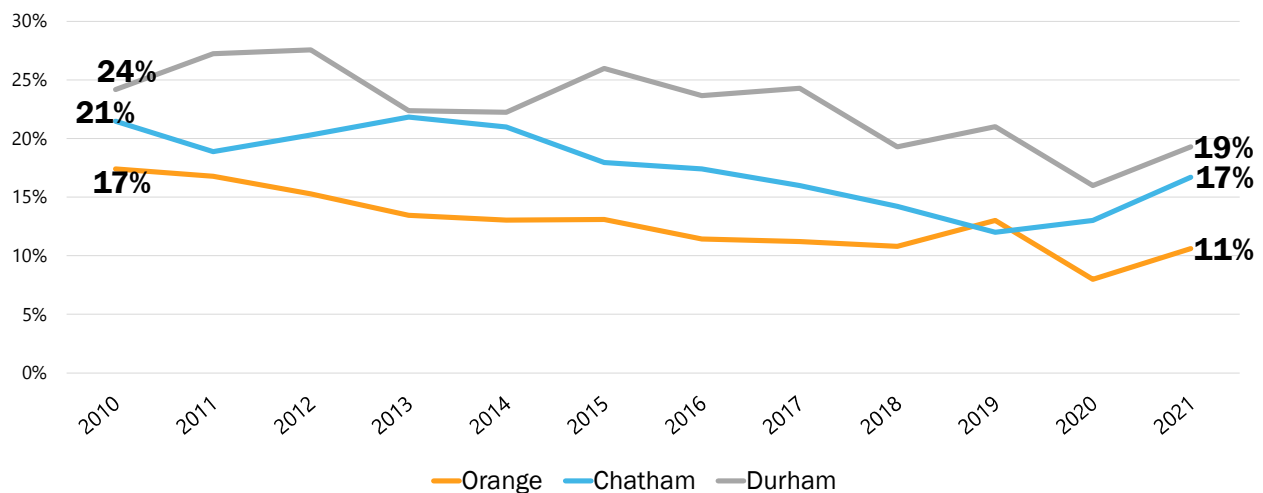


Source: US Census Bureau Small Area Income and Poverty Estimates (SAIPE)

209

Children in poverty rate declining with slight uptick in 2021

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

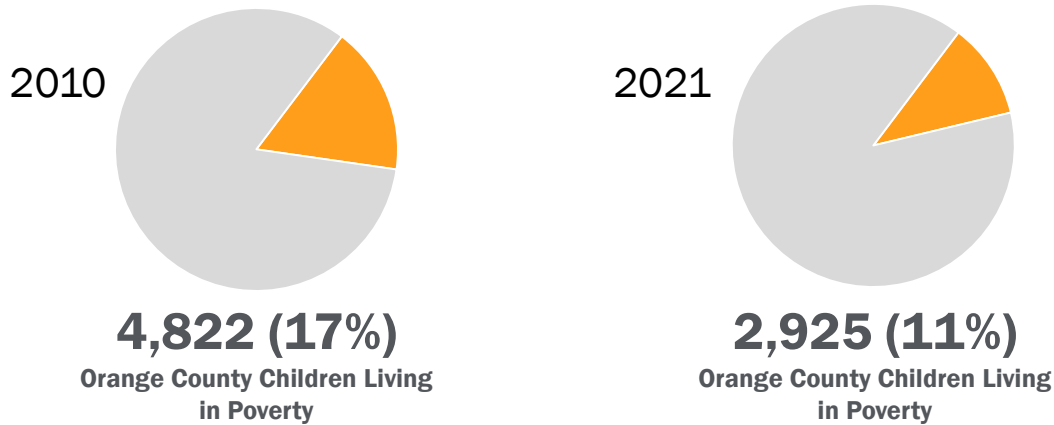


Source: US Census Bureau Small Area Income and Poverty Estimates (SAIPE)

210

Orange County children in poverty

Percentage of children living in poverty, 2010 and 2021

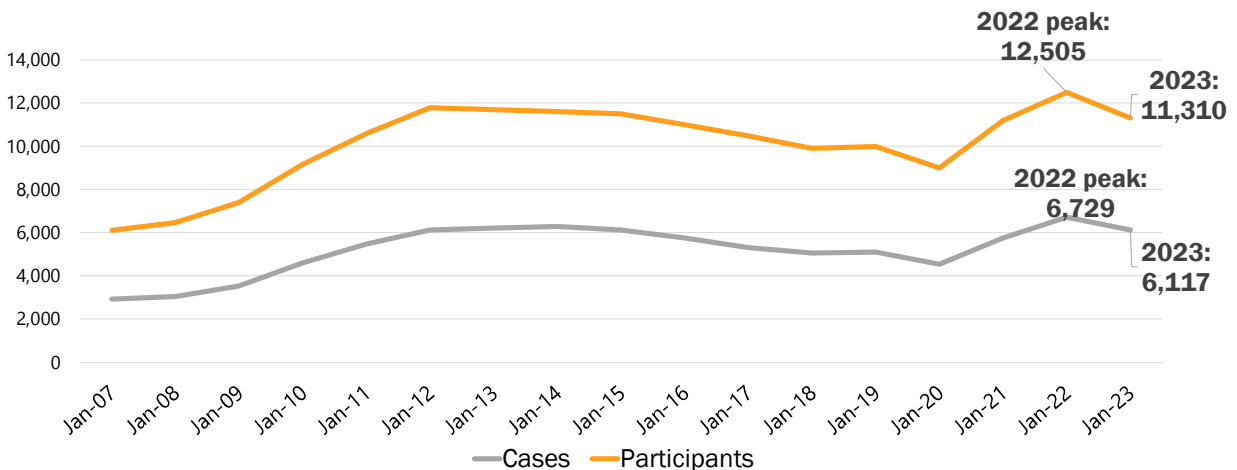


Source: US Census Bureau Small Area Income and Poverty Estimates (SAIPE)

211

Orange County FNS cases + participants, 2007-2023

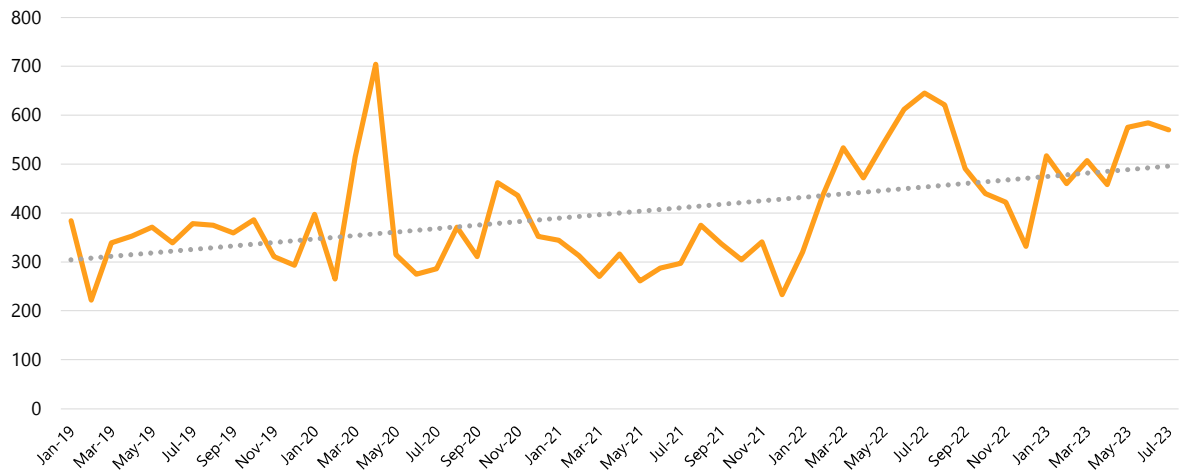
Number of cases (families) and participants (individuals) receiving Orange County Food and Nutrition Services (FNS, formerly Food Stamps) in January each year 2007 through 2023



Source: NC Department of Health and Human Services

212

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



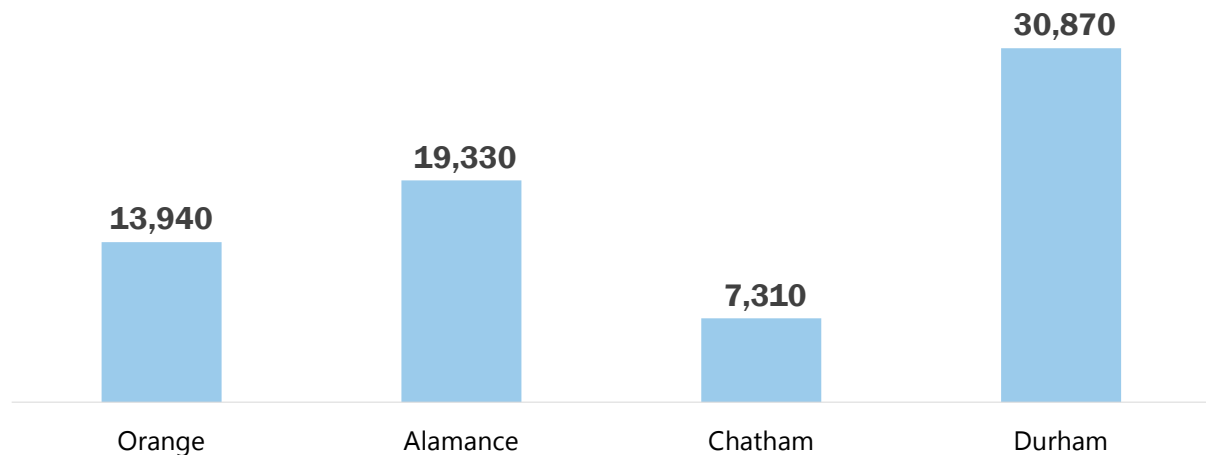
*Nov-21 is an average of Oct-21 & Dec-21

Source: NC Department of Health and Human Services

213

Food insecure people (2021)

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

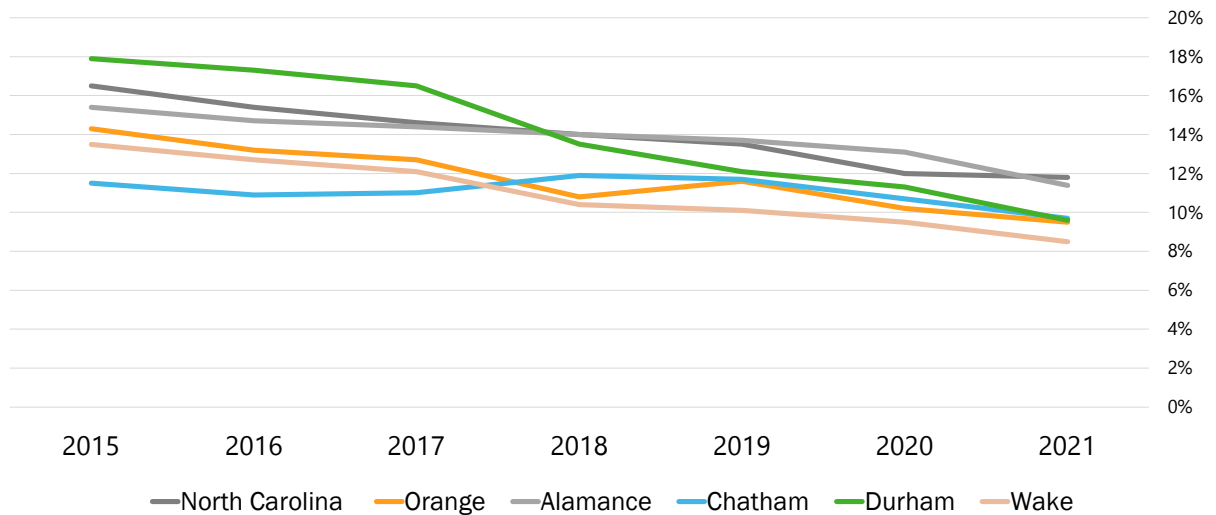


Source: Feeding America

214

Food insecurity declines across the region

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

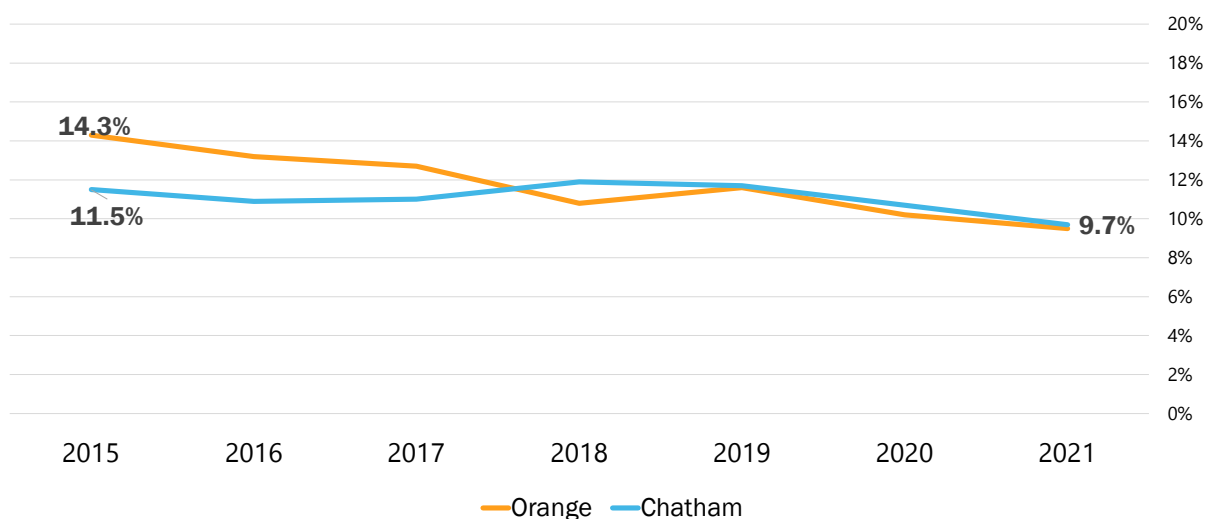


Source: Feeding America

215

Food insecurity declines across the region

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

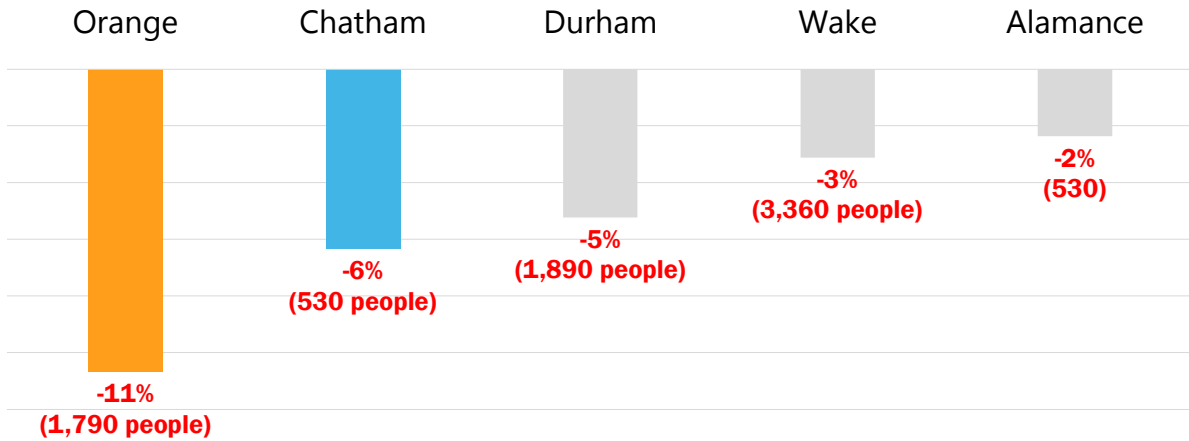


Source: Feeding America

216

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



Source: Feeding America

217

Homelessness

218

Homelessness in Orange County

Orange County 2023 point in time count

126

people experiencing
homelessness

36

people living
unsheltered

33

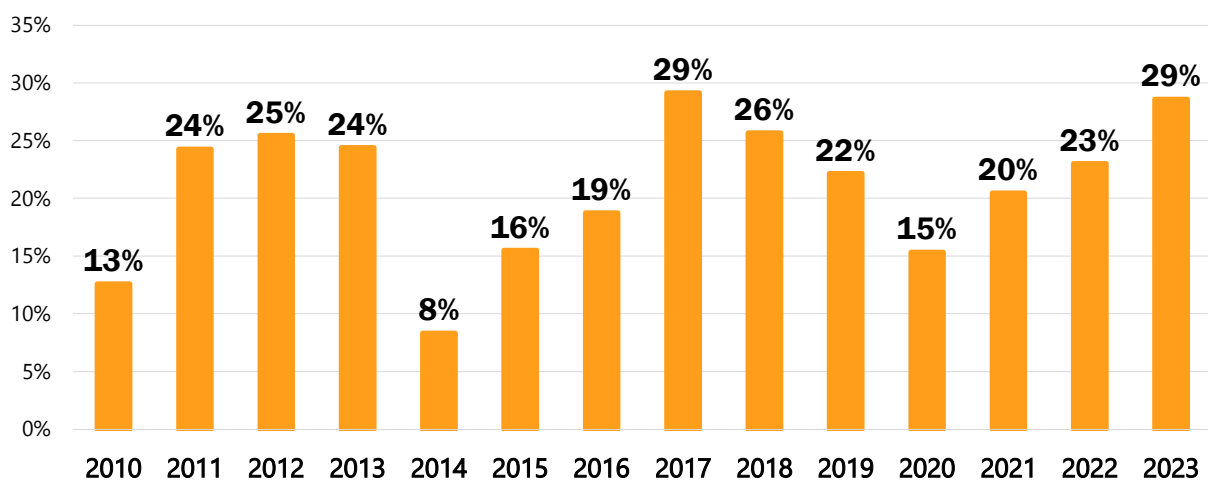
people considered
chronically homeless

Source: Orange County Partnership to End Homelessness

219

Percent of Orange County homeless living unsheltered

Orange County annual point in time count, 2010-2023

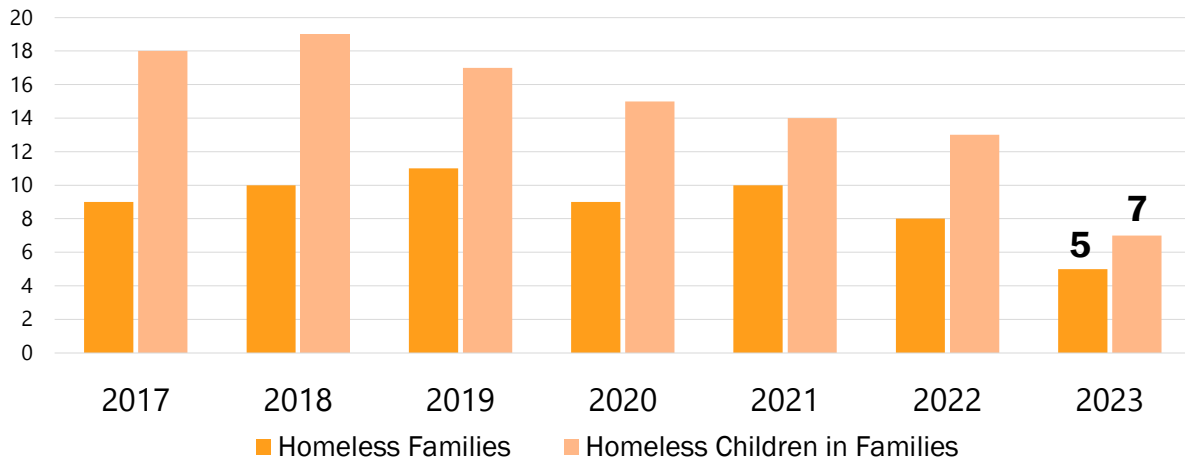


Source: Orange County Partnership to End Homelessness

220

Orange County homeless children and families

Orange County annual point in time count, 2010-2023

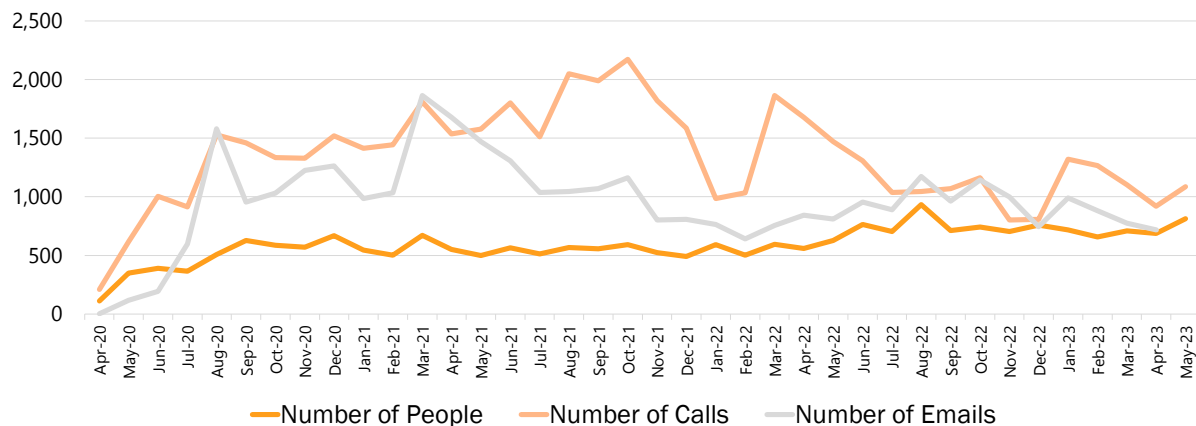


Source: Orange County Partnership to End Homelessness

221

Orange County Housing Helpline

Calls, emails, and individuals served by the Orange County Housing Helpline April 2020 to May 2023



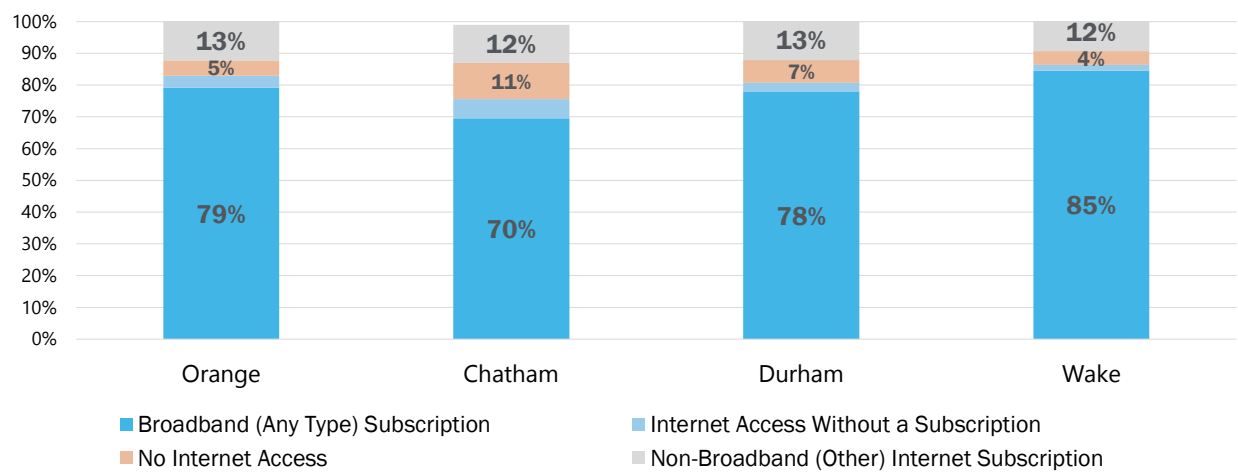
Source: Orange County Partnership to End Homelessness

222

Internet Access

223

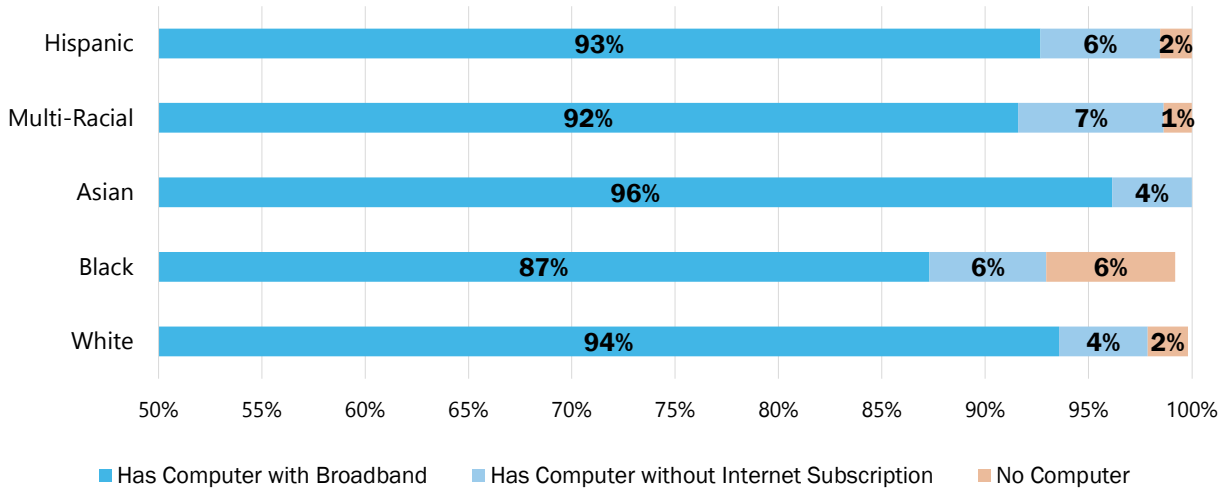
Internet subscriptions by type, by county



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

224

Orange County PC access and internet subscription by race/ ethnicity



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

225

Orange County Employers & Industries

226

Orange County's top 25 employers, 2022

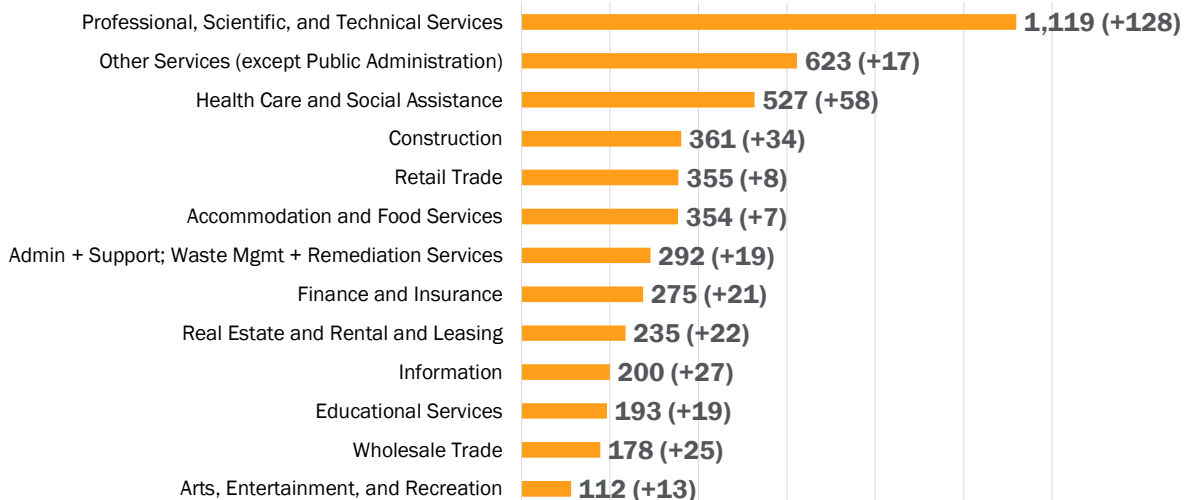
- | | |
|---|--------------------------------------|
| 1. UNC Chapel Hill | 14. Aramark |
| 2. UNC Health | 15. Wegmans |
| 3. Chapel Hill-Carrboro City Schools | 16. Carol Woods Retirement Community |
| 4. Orange County Schools | 17. Food Lion |
| 5. Orange County Government | 18. PHE, Inc. |
| 6. ABB/Industrial 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

227

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)

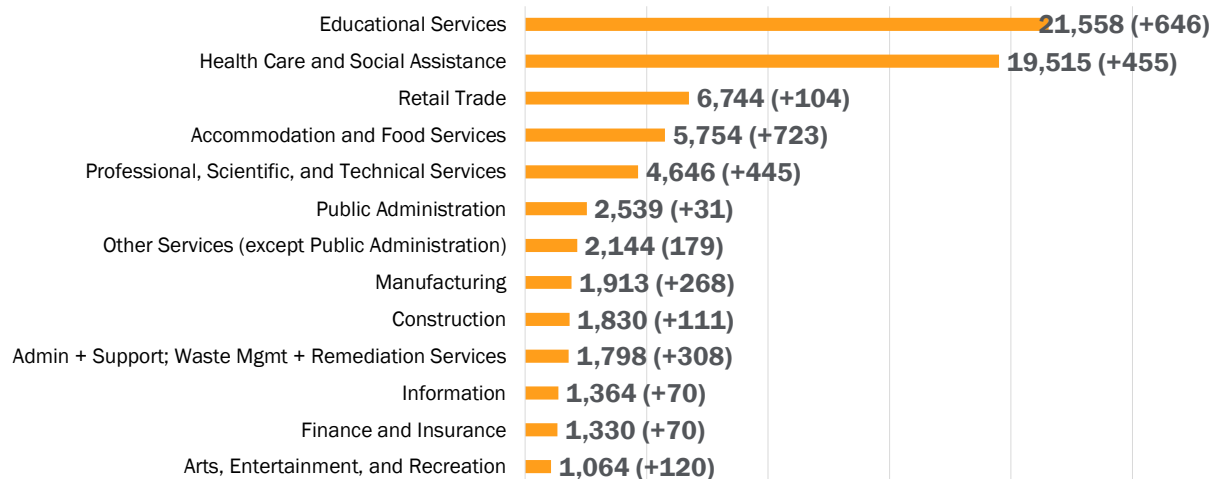


Source: Quarterly Census of Wages via NC Department of Commerce

228

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)

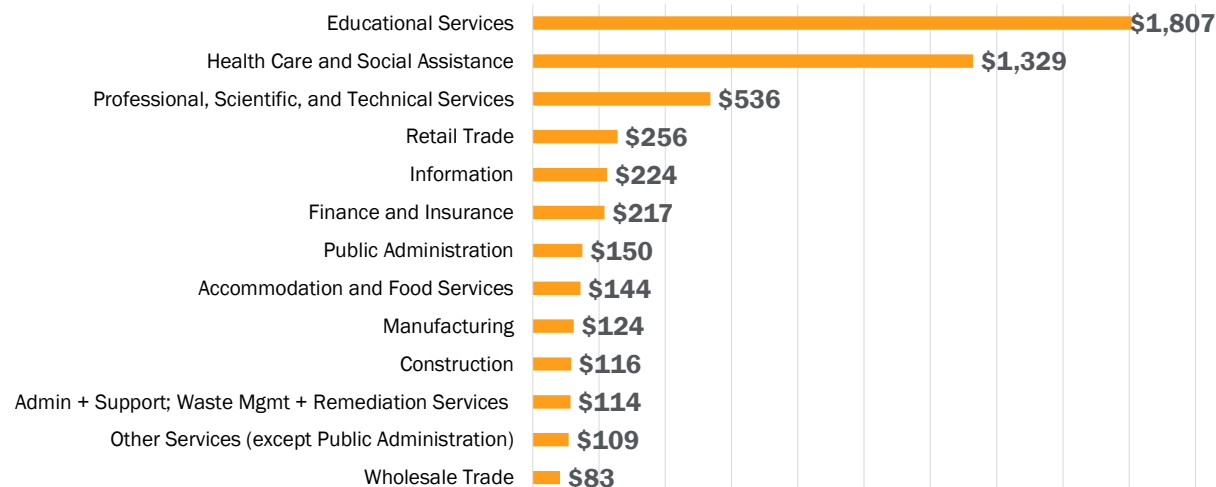


Source: Quarterly Census of Wages via NC Department of Commerce

229

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

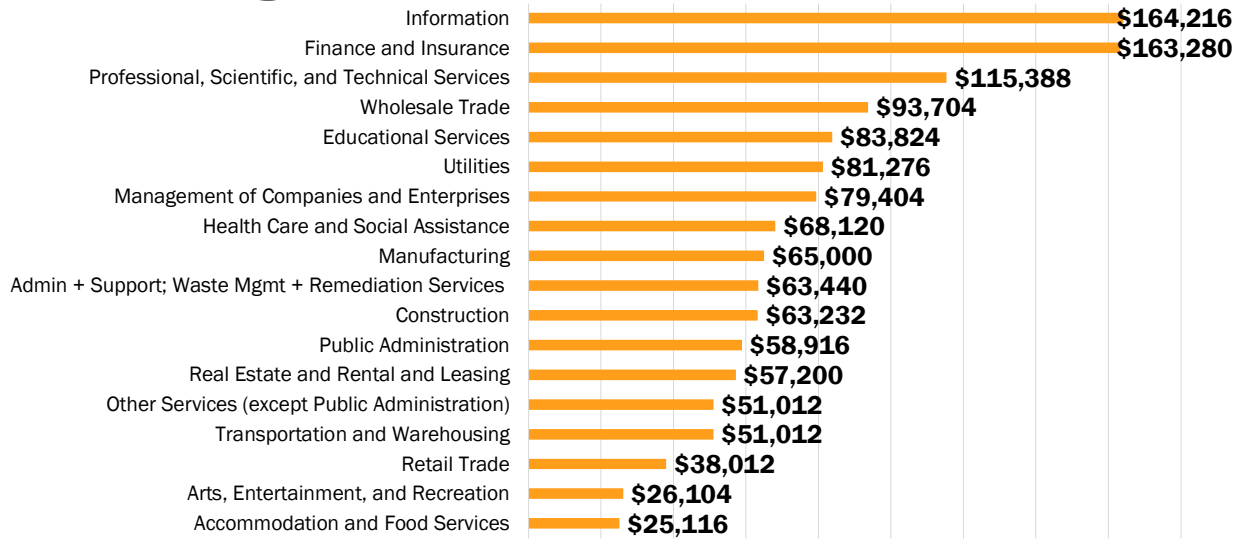
Total wages: \$5.37 billion (by NAICS code)



Source: Quarterly Census of Wages via NC Department of Commerce

230

Top Orange County industries by 2022 total average annual wages



Source: Quarterly Census of Wages via NC Department of Commerce

231

Chatham County Employers & Industries

232

Chatham County's top 25 employers, 2022

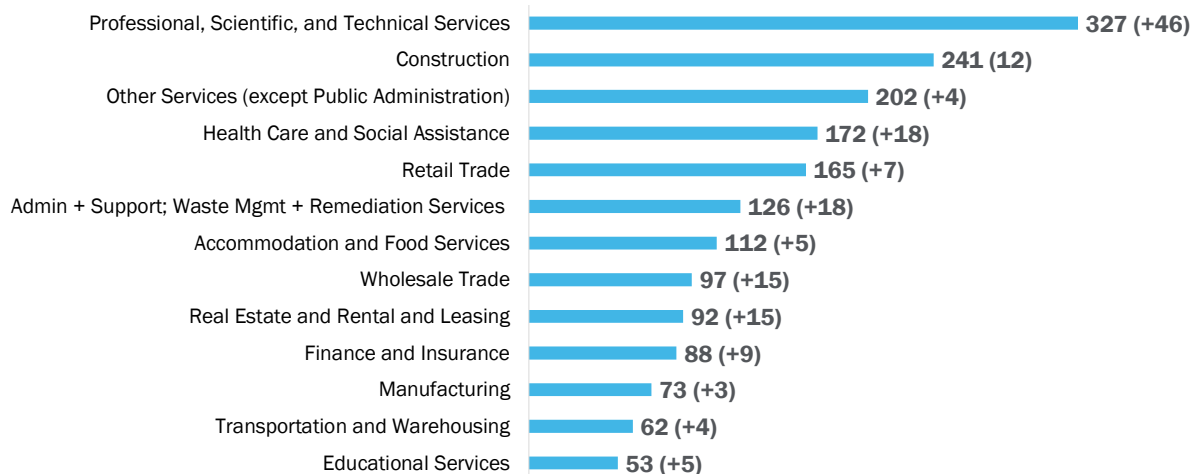
- | | |
|-------------------------------|--|
| 1. Chatham County Schools | 14. Lowes Home Centers |
| 2. Chatham County Government | 15. MJ's Staffing |
| 3. Carolina Meadows | 16. Old Dominion Insulation |
| 4. Mountaire Farms of NC | 17. Governors Club |
| 5. Galloway Ridge | 18. Harris Teeter |
| 6. UNC Health | 19. Aegis Home Care |
| 7. Wal-Mart Associates | 20. MAS Acme USA |
| 8. NFI Interactive Logistics | 21. Southern Veneer Specialty Products |
| 9. Flakeboard America Limited | 22. Food Lion |
| 10. Charter Furniture | 23. Town & Country Hardware Stores |
| 11. Piedmont Health Services | 24. Brookwood Farms |
| 12. Fearrington | 25. Packers Sanitation Services |
| 13. The Laurels of Chatham | |

Source: NC Department of Commerce

233

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

Total establishments: 1,912; 178 new since 2021 (by NAICS code)

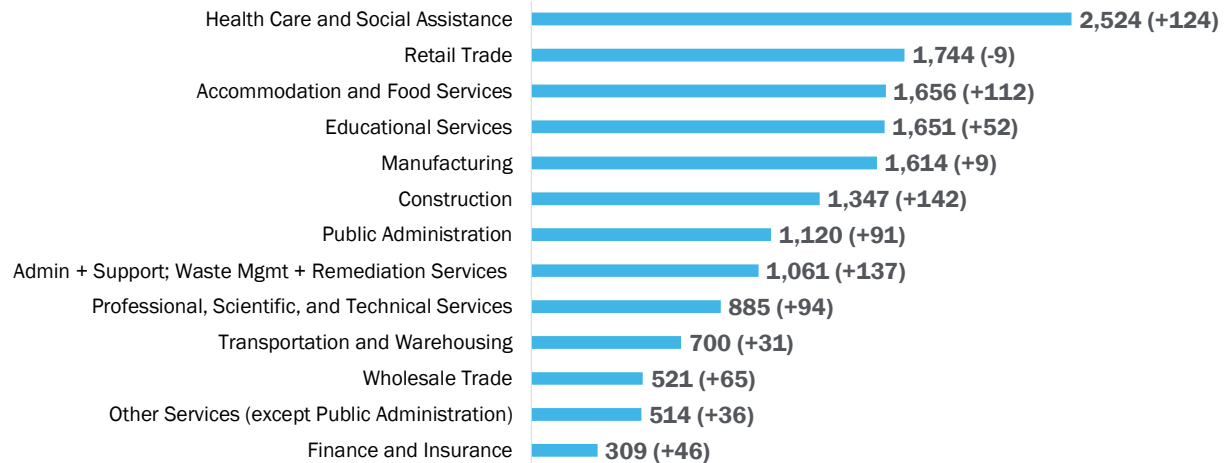


Source: Quarterly Census of Wages via NC Department of Commerce

234

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

Total employment: 16,283; 991 net new jobs since 2021 (by NAICS code)

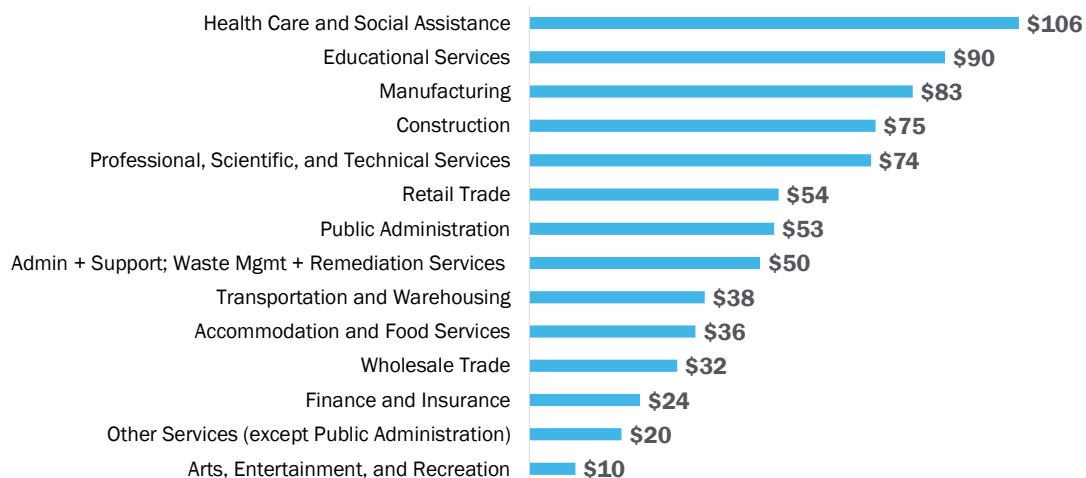


Source: Quarterly Census of Wages via NC Department of Commerce

235

Top Chatham County industries by 2022 total wages in millions

Total wages: \$767 million (by NAICS code)

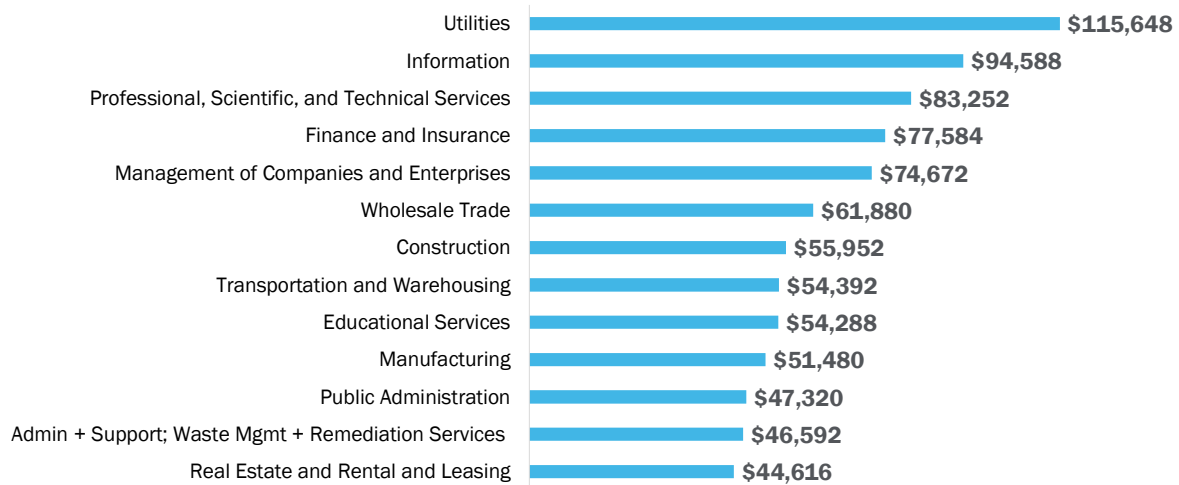


Source: Quarterly Census of Wages via NC Department of Commerce

236

Top Chatham County industries in 2022 by average annual wages

(by NAICS code)



Source: Quarterly Census of Wages via NC Department of Commerce

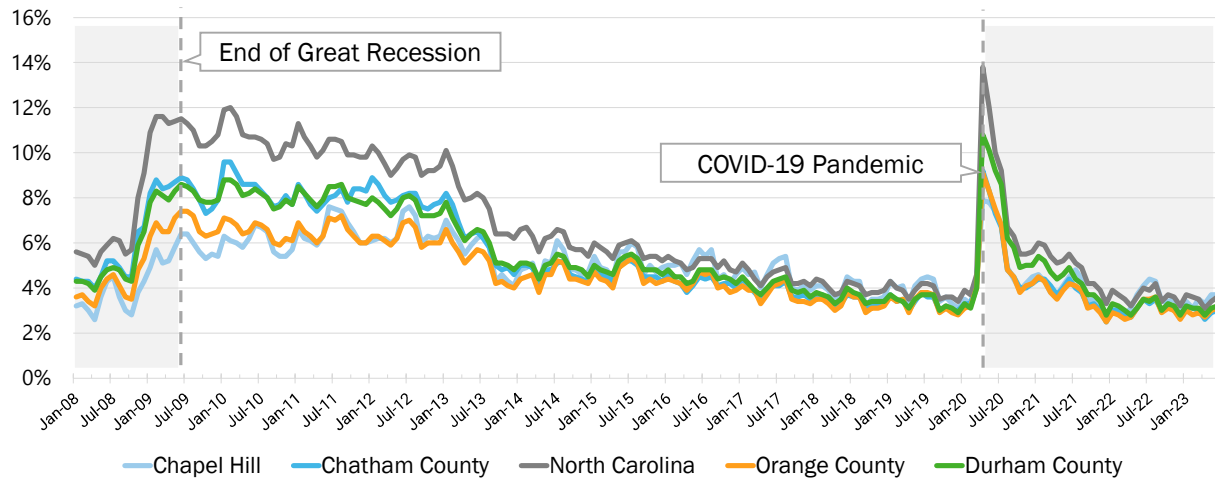
237

Unemployment & Labor Force

238

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

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

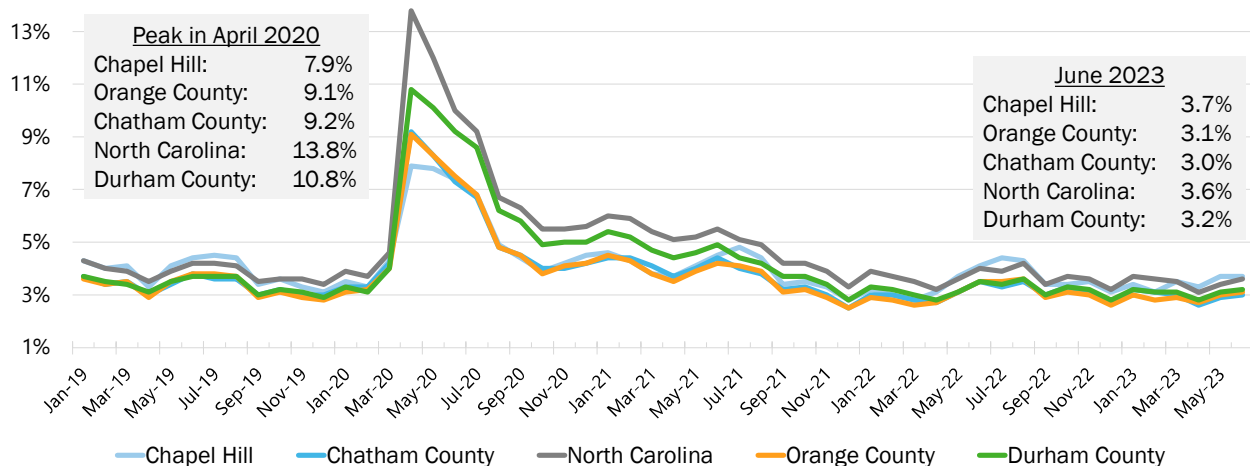


Source: Local Area Unemployment Statistics (LAUS) via NC Department of Commerce

239

Monthly unemployment rate

(unadjusted), 1/2019 to 6/2023

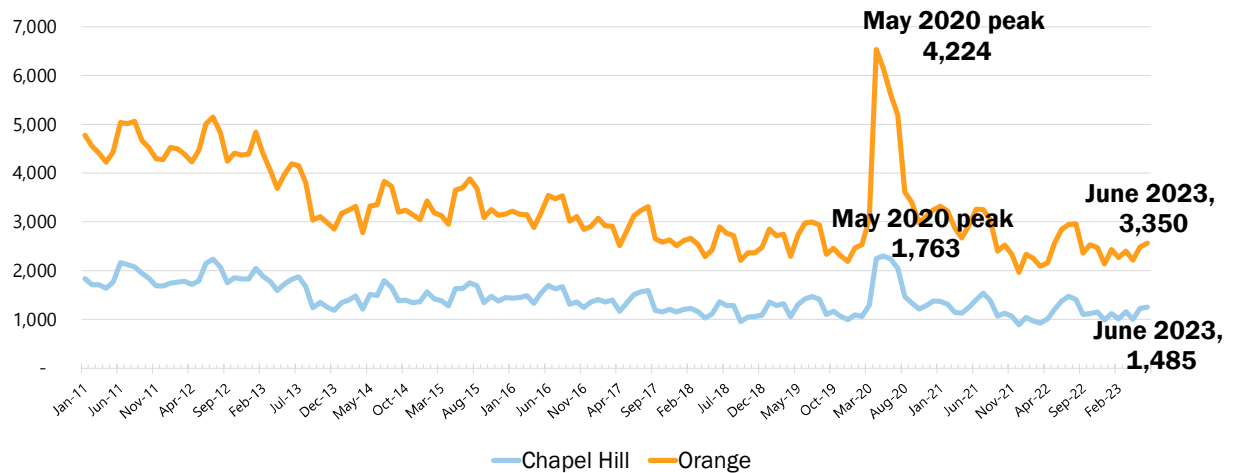


Source: Local Area Unemployment Statistics (LAUS) via NC Department of Commerce

240

Orange County + Chapel Hill monthly unemployment

Monthly unemployed individuals, 01/2011 - 06/2023



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

241

North Carolina workforce participation rate

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

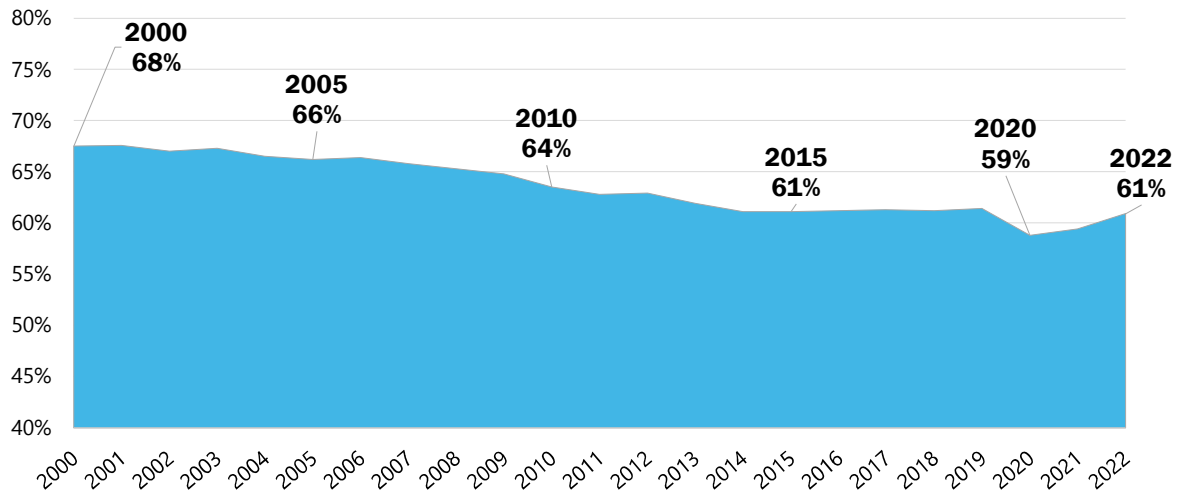


Source: Local Area Unemployment Statistics (LAUS) via NC Department of Commerce

242

North Carolina workforce participation rate

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

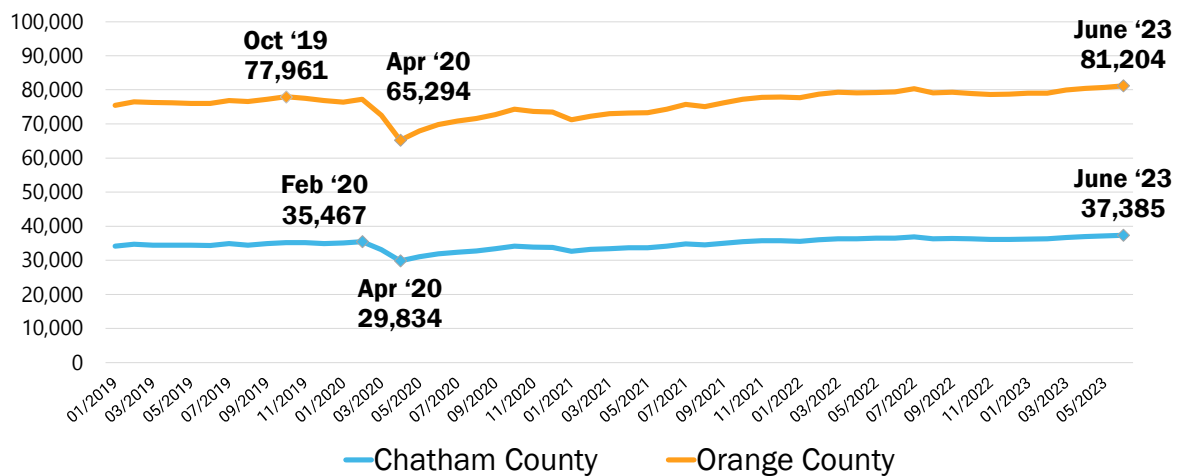


Source: Local Area Unemployment Statistics (LAUS) via NC Department of Commerce

243

Monthly employment – Orange + Chatham

Monthly employed individuals, 05/2013 – 06/2023



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

244

Wages & Income

245

Average AGI

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

246

Average itemized charitable contributions

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

247

Percentage of AGI given to charity

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

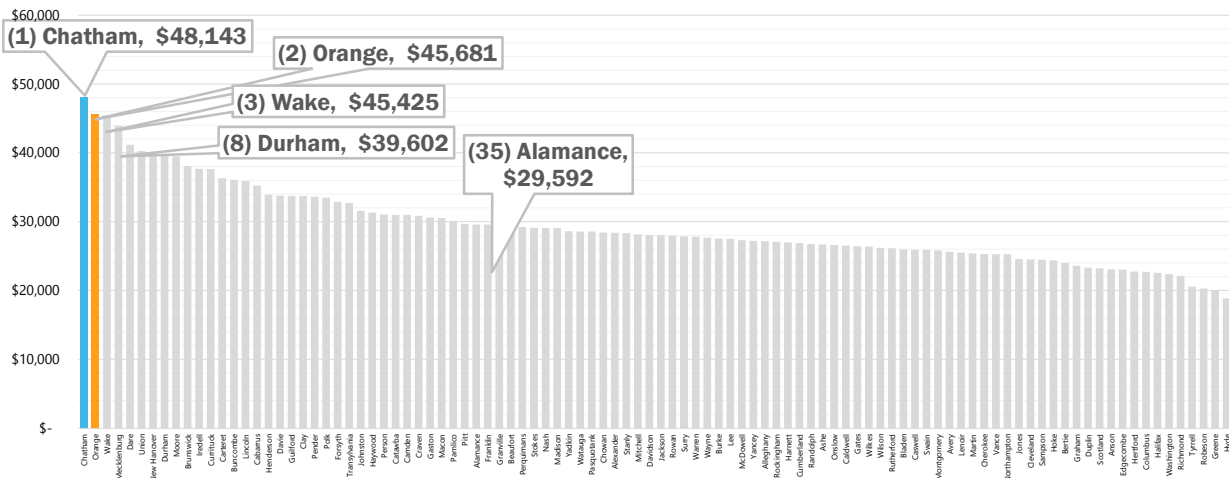
	Percent of AGI Contributed	Rank (of 100 Counties)
Durham County	7%	58
Alamance County	7%	64
Wake County	5%	89
Chatham County	5%	90
Orange County	5%	94

Source: IRS

248

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

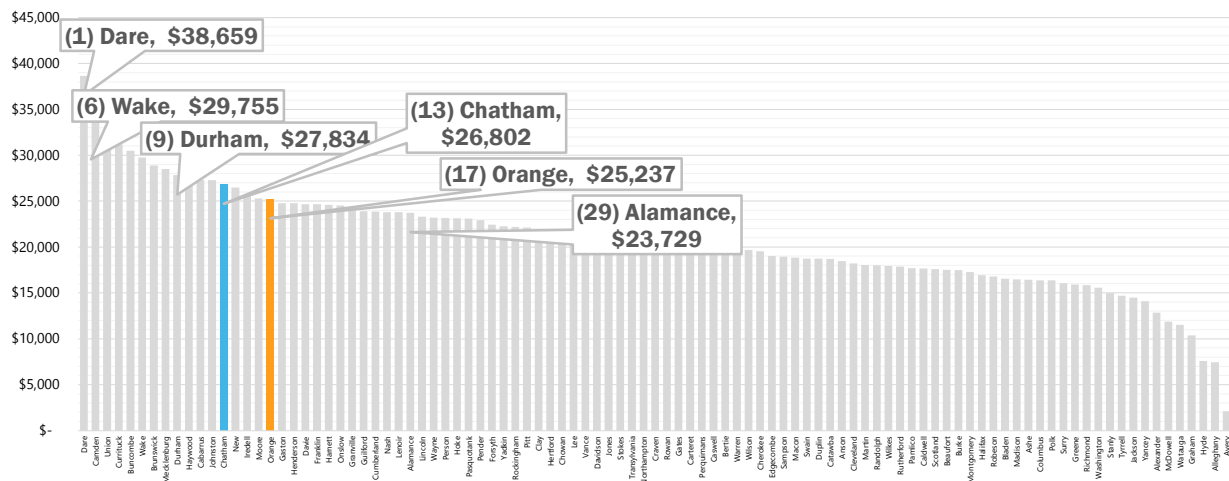


Source: American Community Survey (2017-2021 5-Year Estimates)

249

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

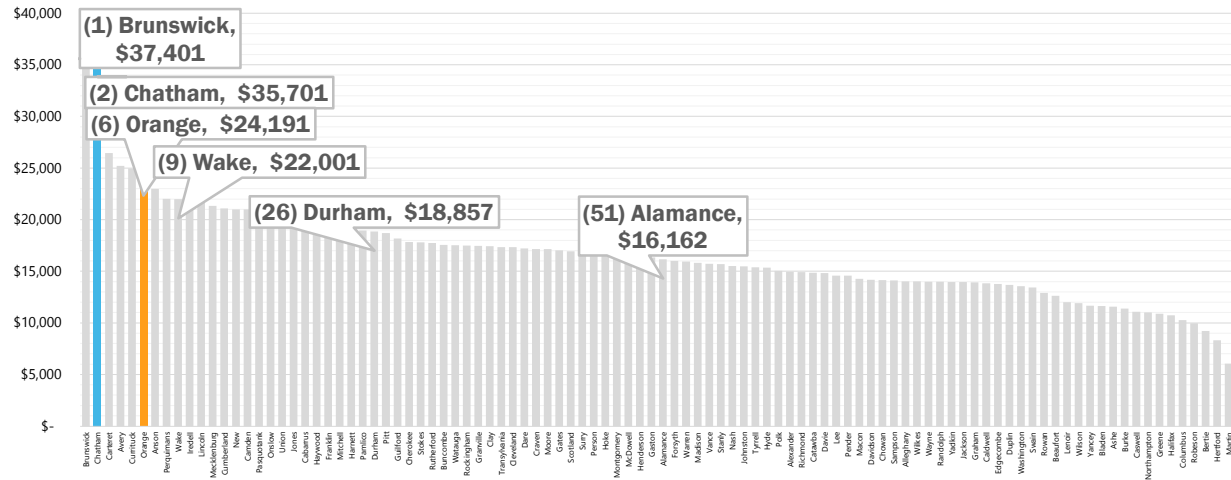


Source: American Community Survey (2017-2021 5-Year Estimates)

250

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

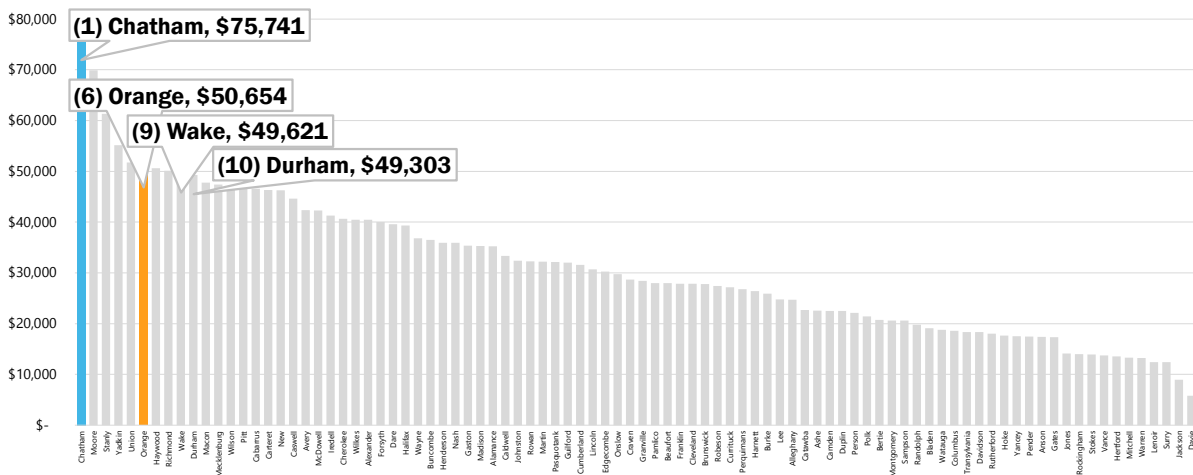


Source: American Community Survey (2017-2021 5-Year Estimates)

251

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

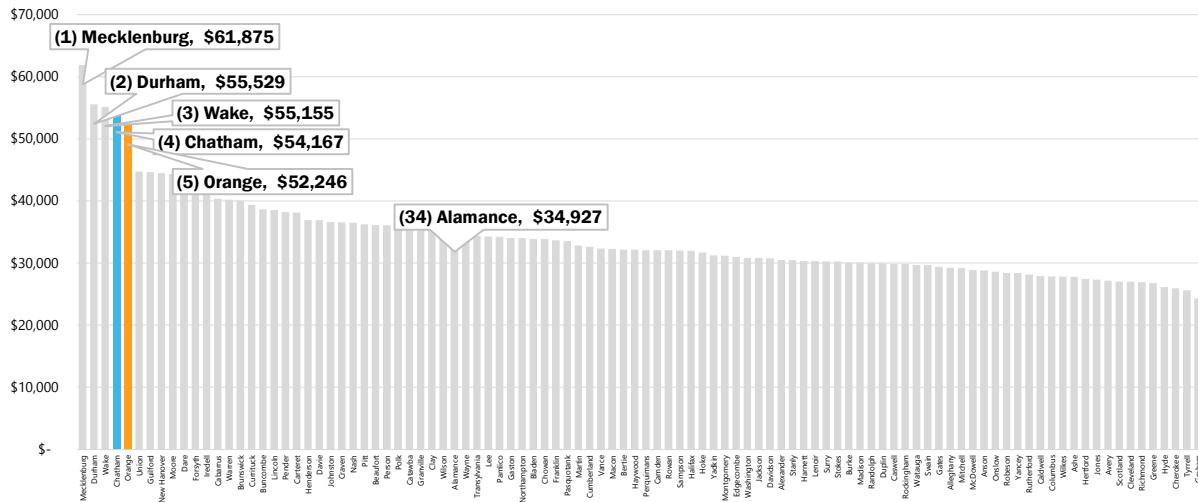


Source: American Community Survey (2017-2021 5-Year Estimates)

252

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

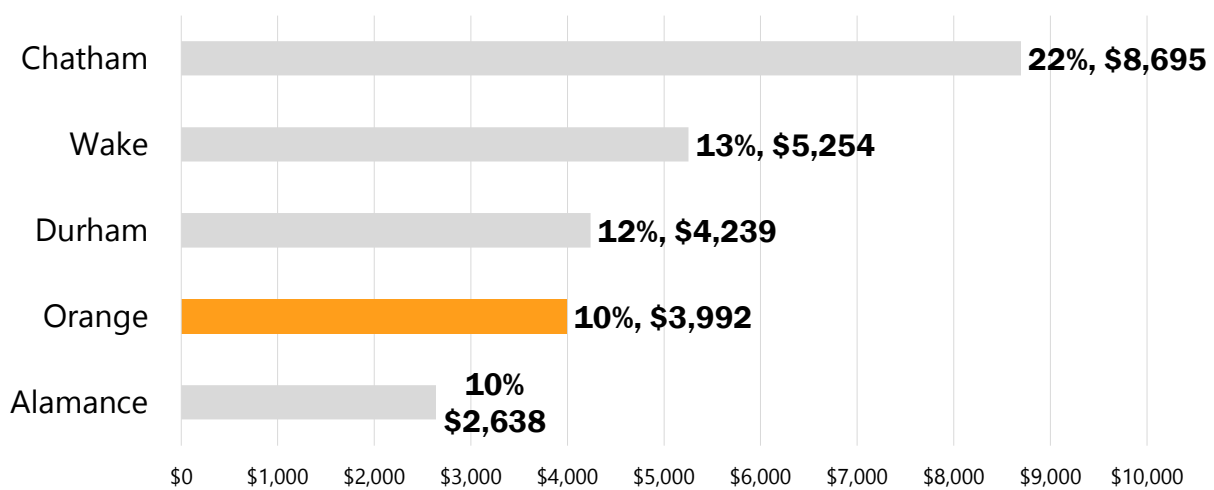


Source: American Community Survey (2017-2021 5-Year Estimates)

253

Growth in county per capita income, 2016 to 2021

Inflation adjusted \$2021

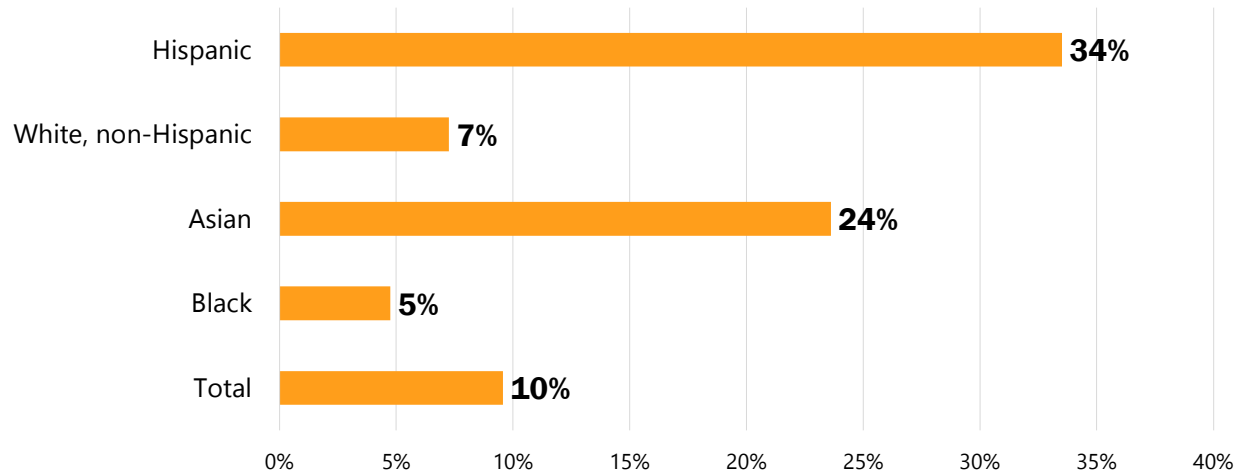


Source: American Community Survey (2017-2021 5-Year Estimates)

254

Orange County per capita income growth

Growth from 2016 to 2021 by race/ethnicity. Inflation adjusted \$2021.

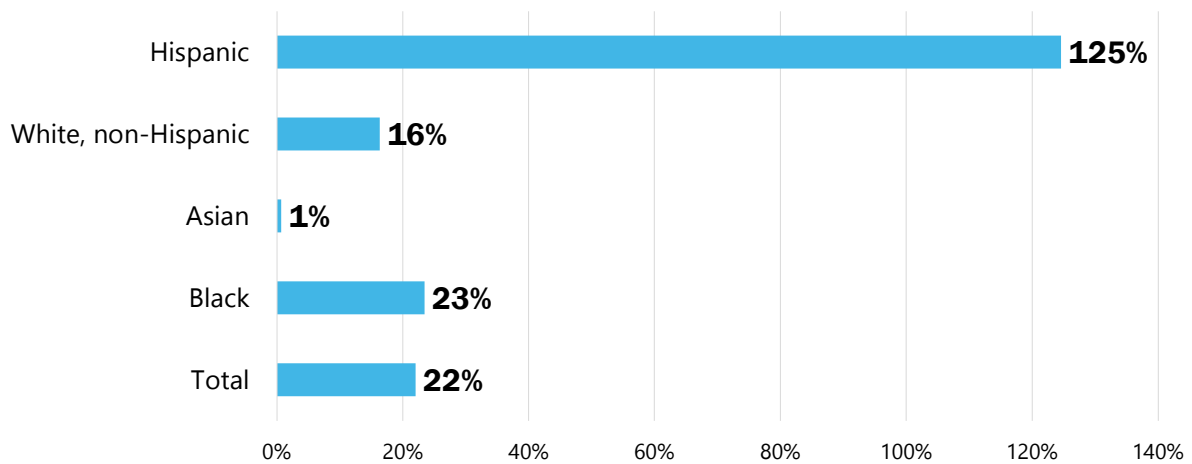


Source: American Community Survey (2017-2021 5-Year Estimates)

255

Chatham County per capita income growth

Growth from 2016 to 2021 by race/ethnicity. Inflation adjusted \$2021.

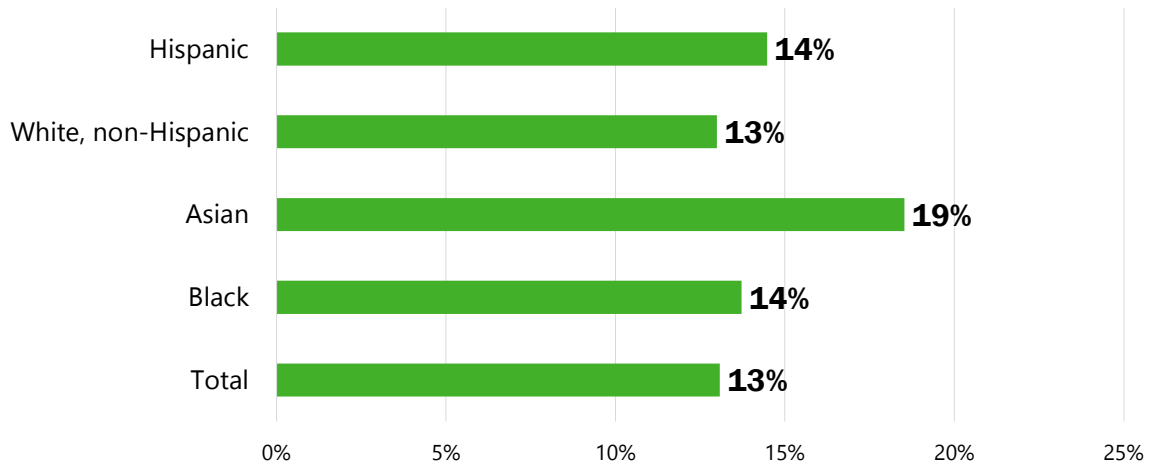


Source: American Community Survey (2017-2021 5-Year Estimates)

256

Wake County per capita income growth

Growth from 2016 to 2021 by race/ethnicity. Inflation adjusted \$2021.

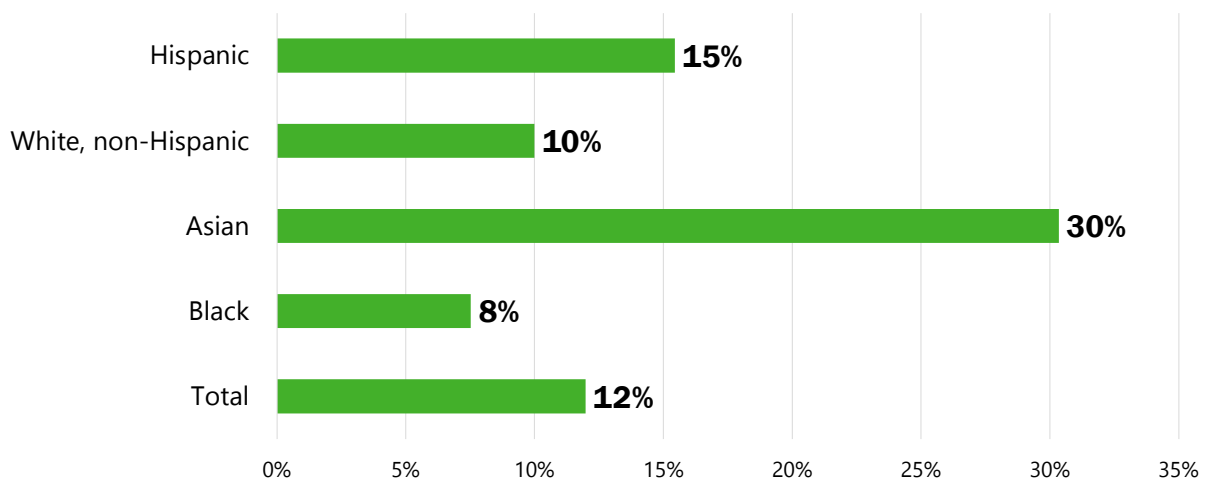


Source: American Community Survey (2017-2021 5-Year Estimates)

257

Durham County per capita income growth

Growth from 2016 to 2021 by race/ethnicity. Inflation adjusted \$2021.

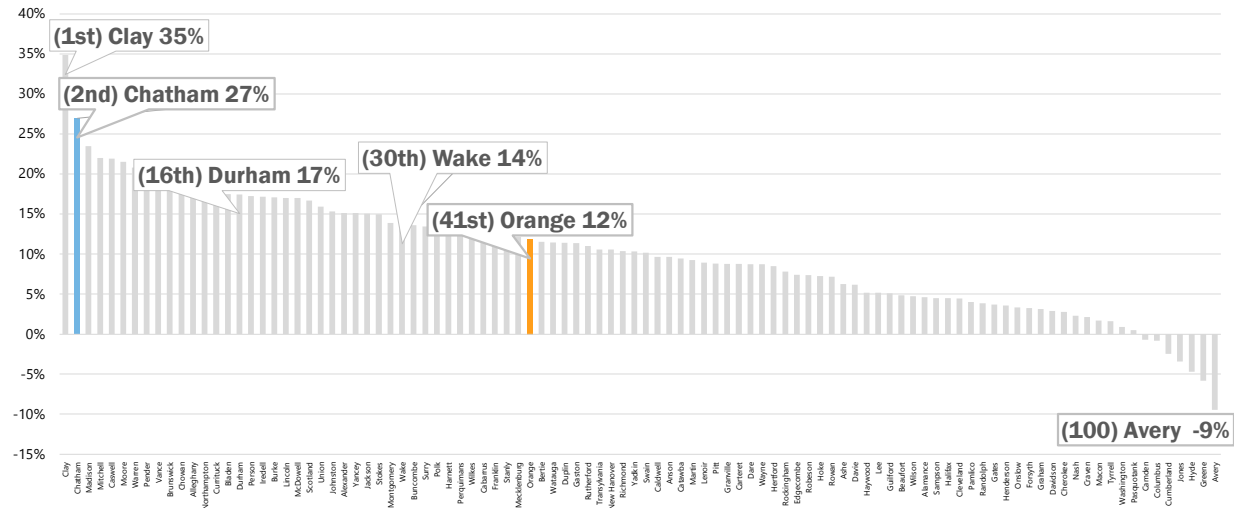


Source: American Community Survey (2017-2021 5-Year Estimates)

258

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)

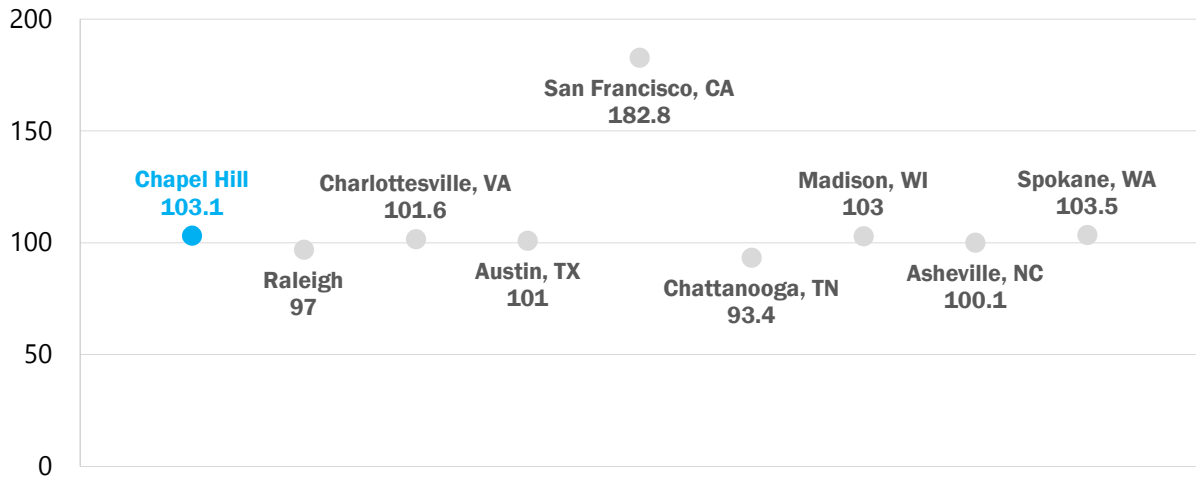
259

Cost of Living

260

2022 Q3 Cost of Living: Composite Index

(100 = national average)

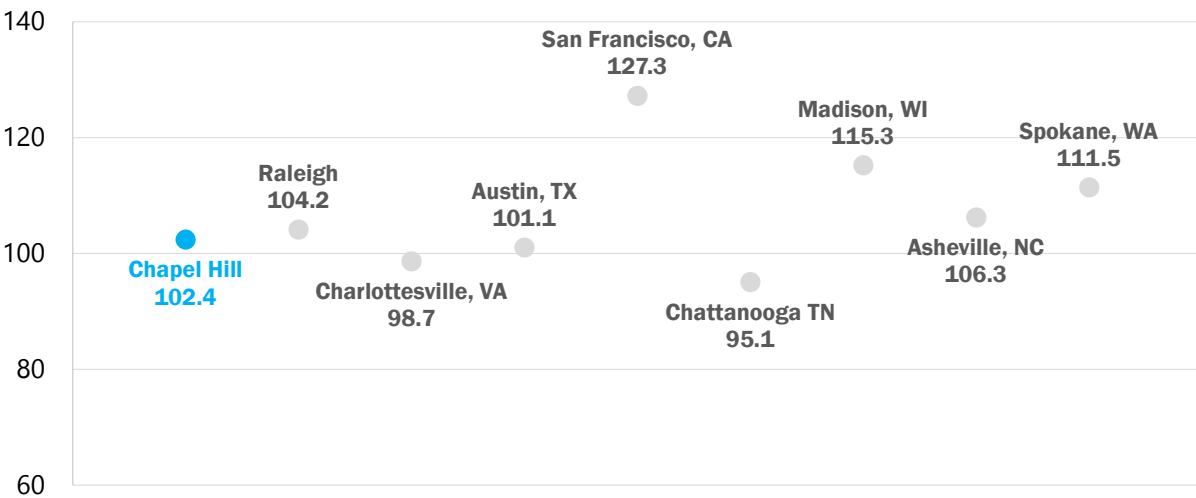


Source: C2ER (Council for Community and Economic Research)

261

2022 Q3 Cost of Living: Healthcare Index

(100 = national average)

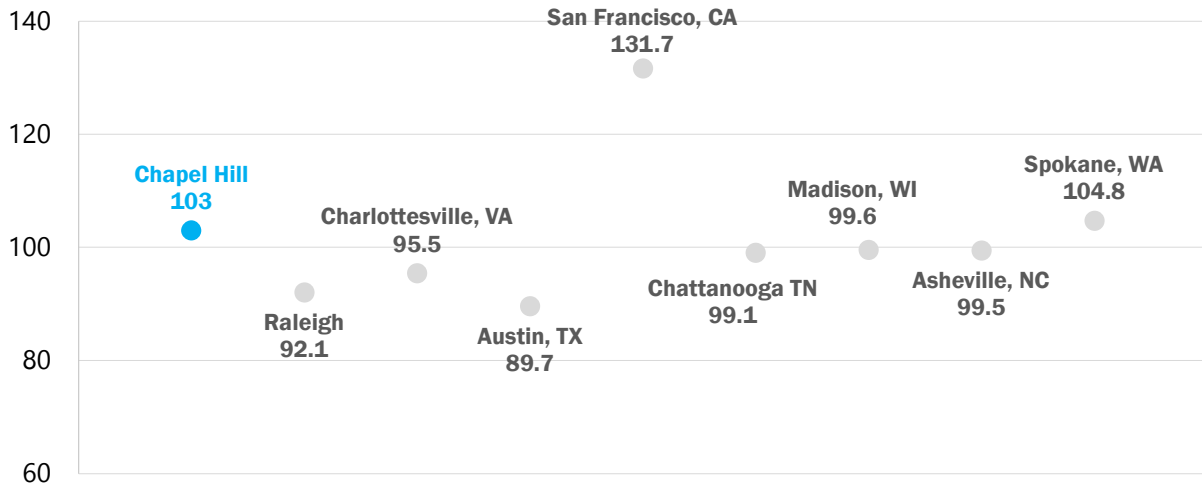


Source: C2ER (Council for Community and Economic Research)

262

2022 Q3 Cost of Living: Grocery Index

(100 = national average)

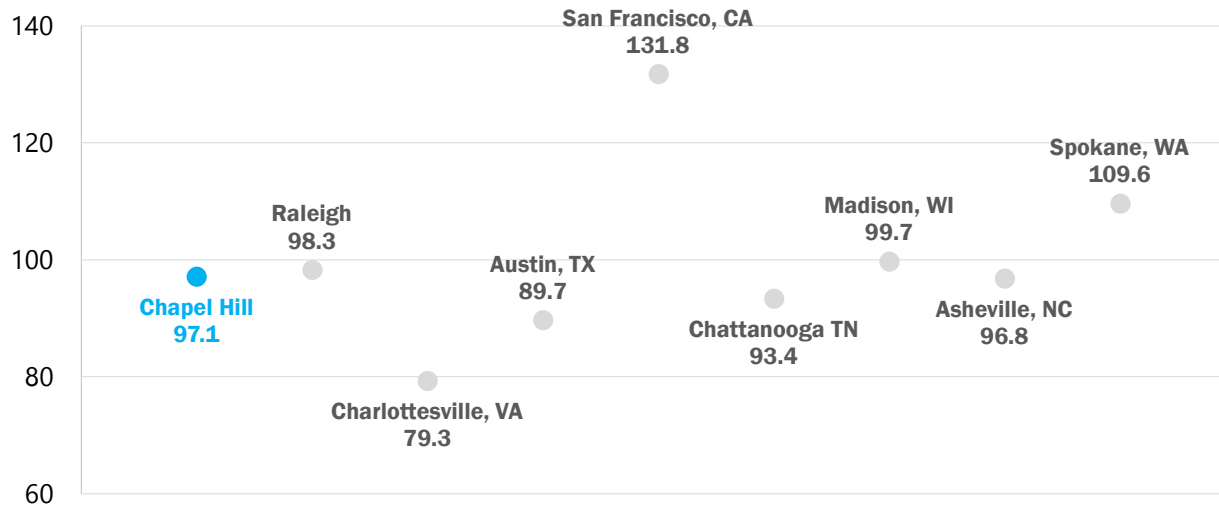


Source: C2ER (Council for Community and Economic Research)

263

2022 Q3 Cost of Living: Transportation Index

(100 = national average)



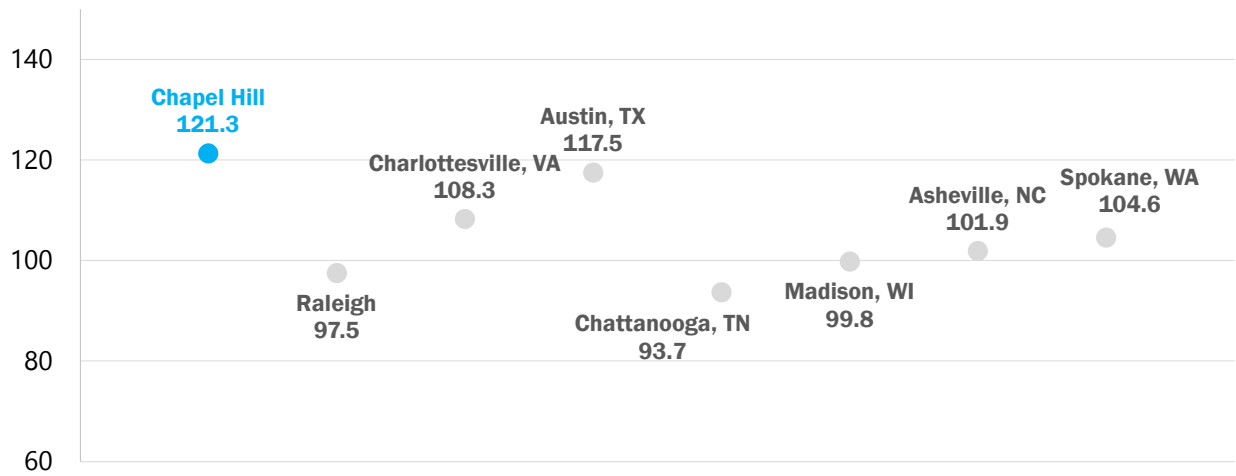
Source: C2ER (Council for Community and Economic Research)

264

2022 Q3 Cost of Living: Housing Index

(100 = national average)

*San Francisco, CA: 307.9



Source: C2ER (Council for Community and Economic Research)

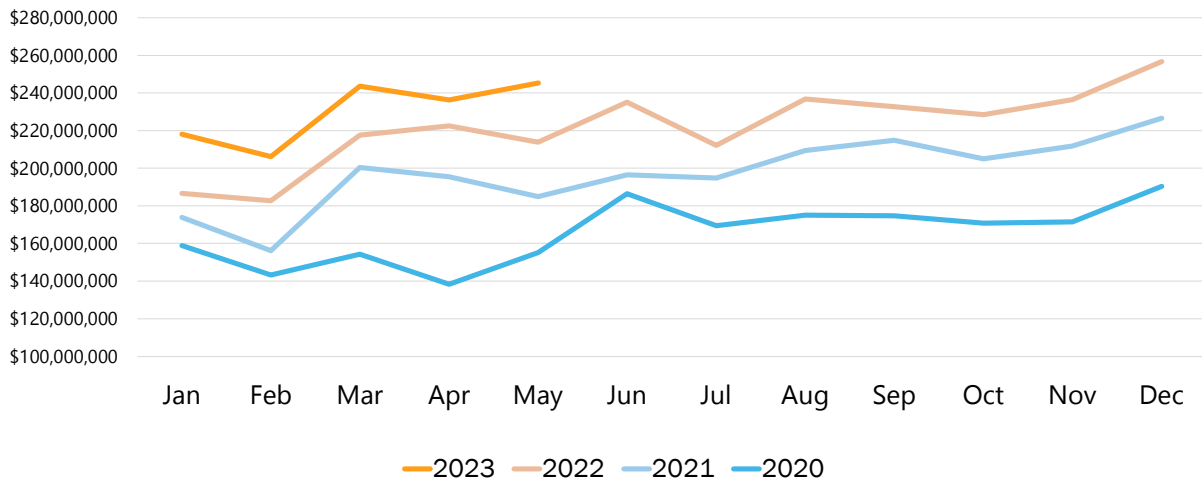
265

Retail Sales, Taxes, Revenue, & Disbursements

266

Orange County retail sales rise year over year

Taxable retail sales by month, 2020 through May 2023

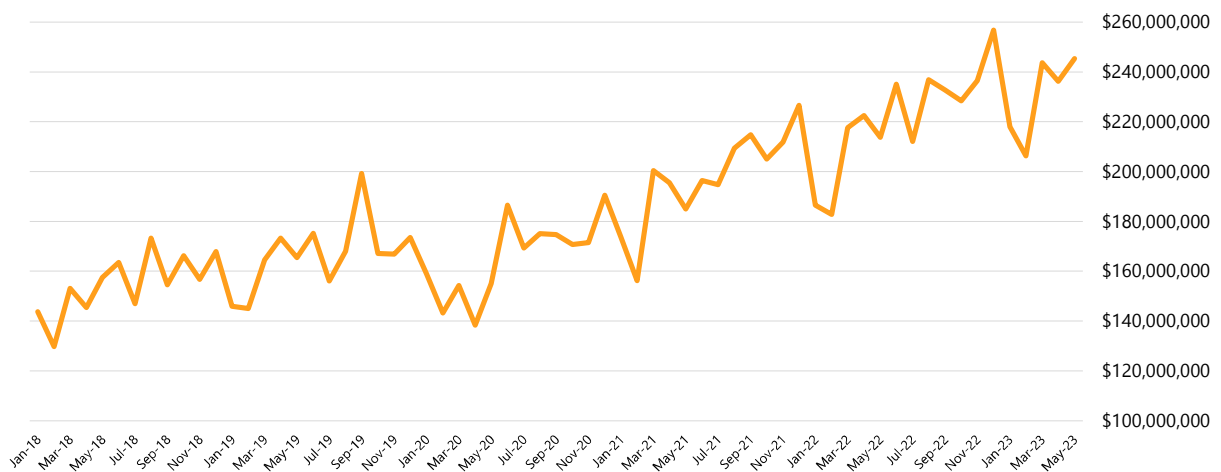


Source: NC Department of Revenue

267

Orange County monthly retail sales

Taxable retail sales by month, 2018 through May 2023

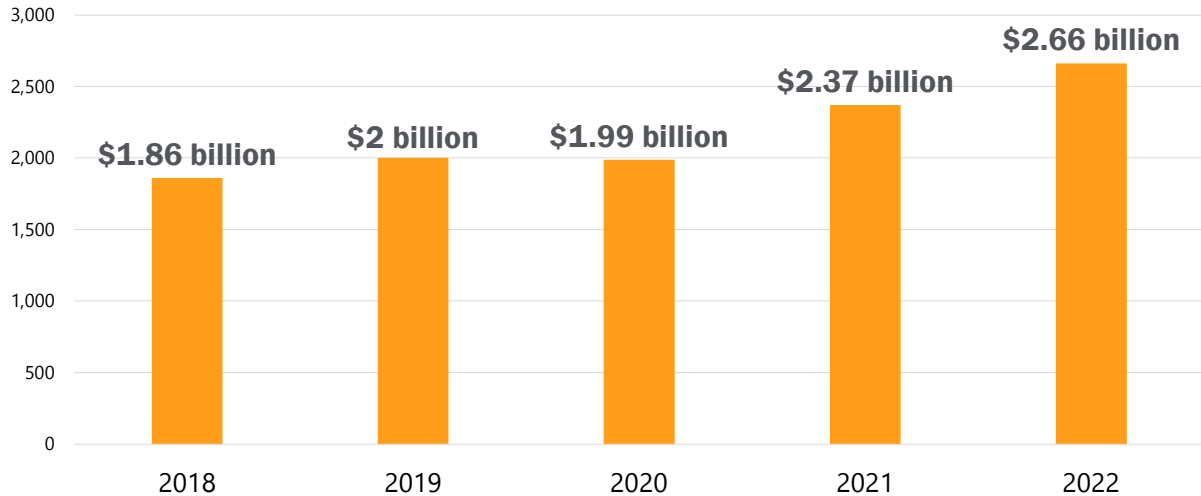


Source: NC Department of Revenue

268

Orange County annual retail sales

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

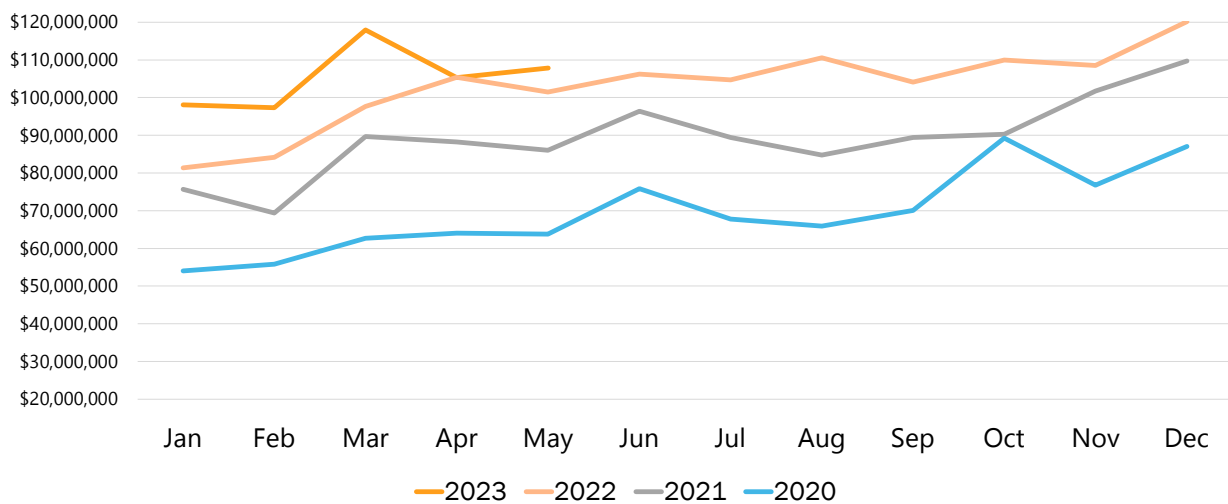


Source: NC Department of Revenue

269

Chatham County retail sales

Taxable retail sales by month, 2020 through May 2023

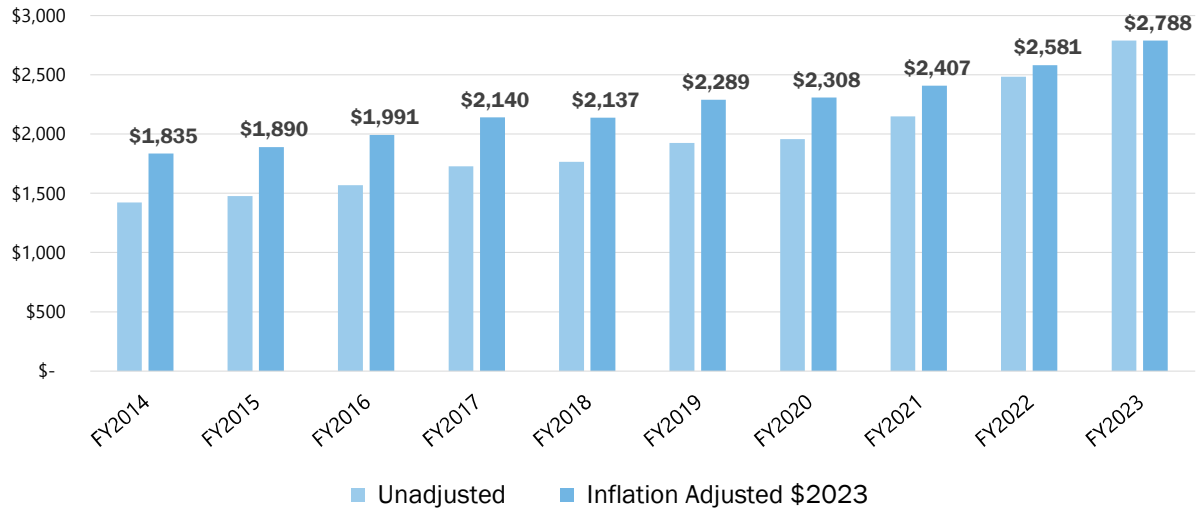


Source: NC Department of Revenue

270

Orange County taxable sales (in millions)

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

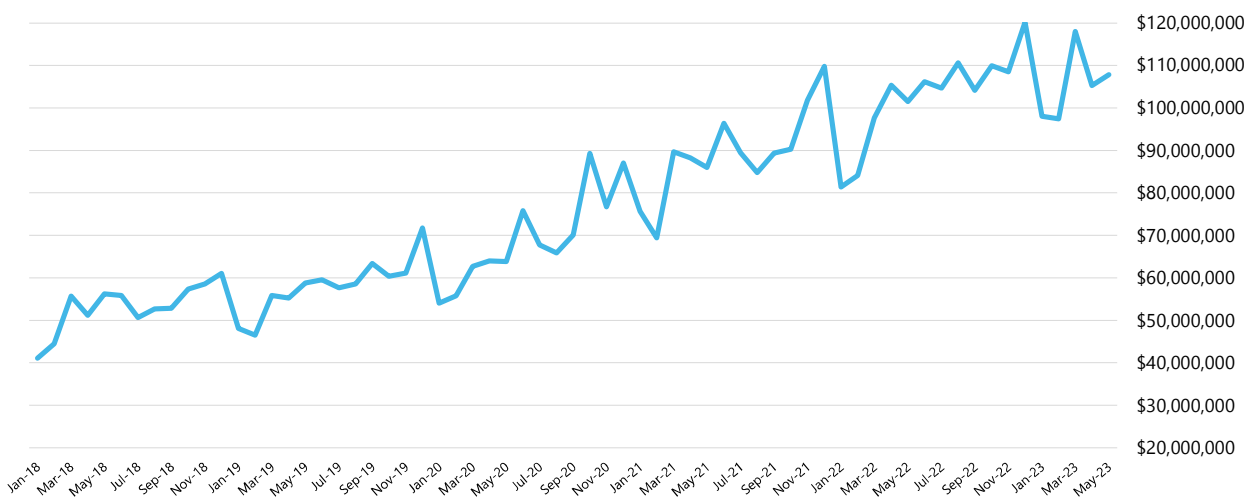


Source: NC Department of Revenue

271

Chatham County monthly retail sales

Taxable retail sales by month, 2018 through May 2023

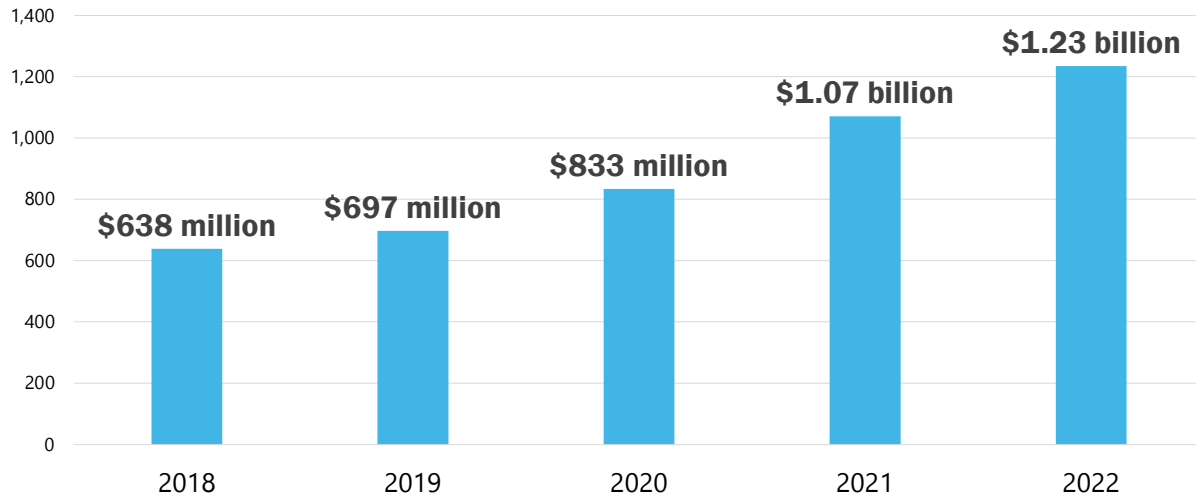


Source: NC Department of Revenue

272

Chatham County annual retail sales

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

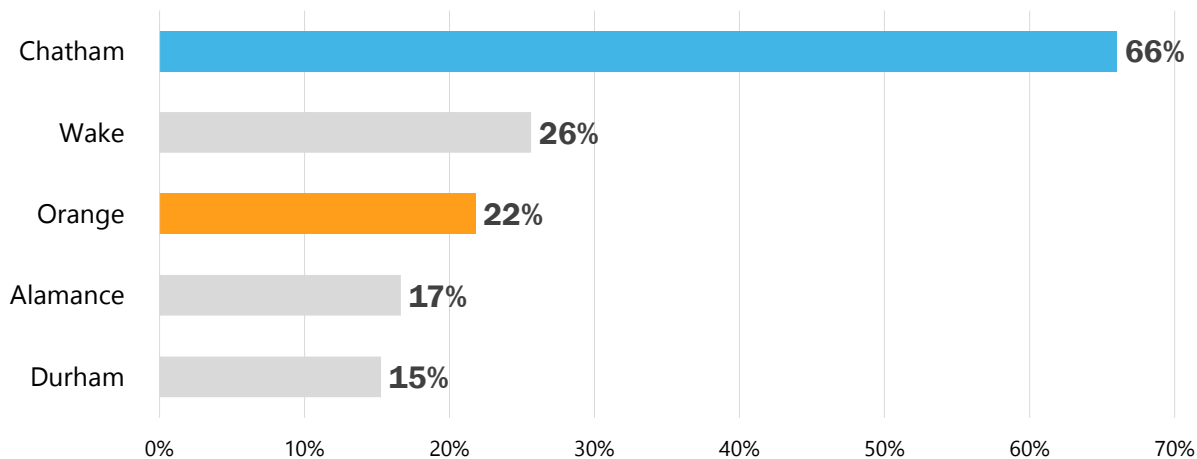


Source: NC Department of Revenue

273

Taxable sales growth from FY2019 to FY2023

(inflation adjusted \$2023)

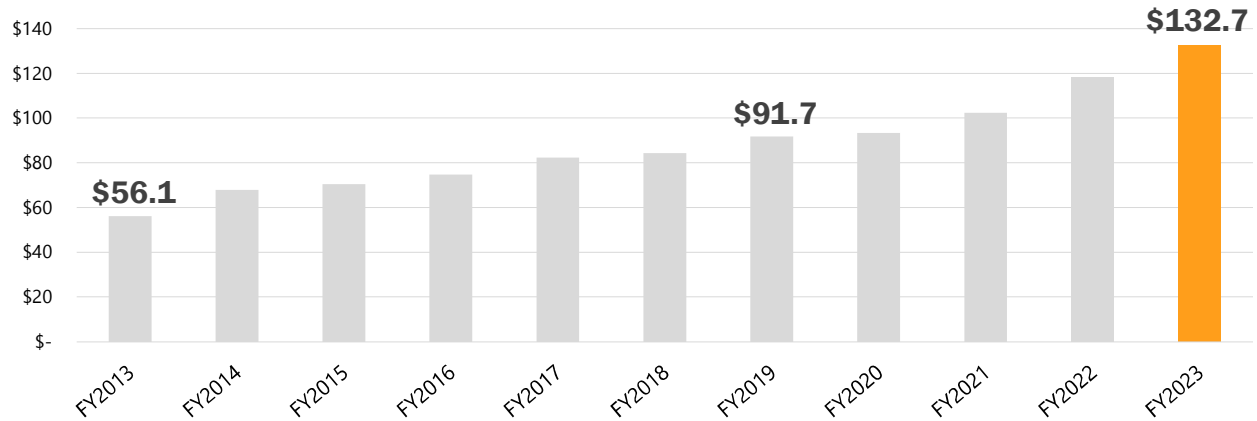


Source: NC Department of Revenue

274

Orange County sales tax collections

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

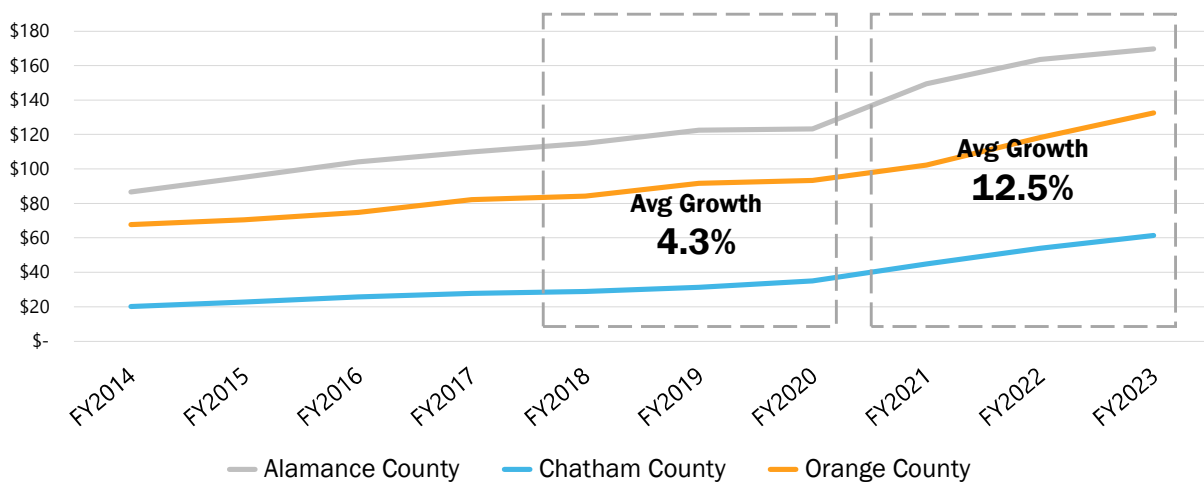


Source: NC Department of Revenue

275

Sales tax collections rising faster post-pandemic

Sales tax collections (in millions), FY2014 – FY2023

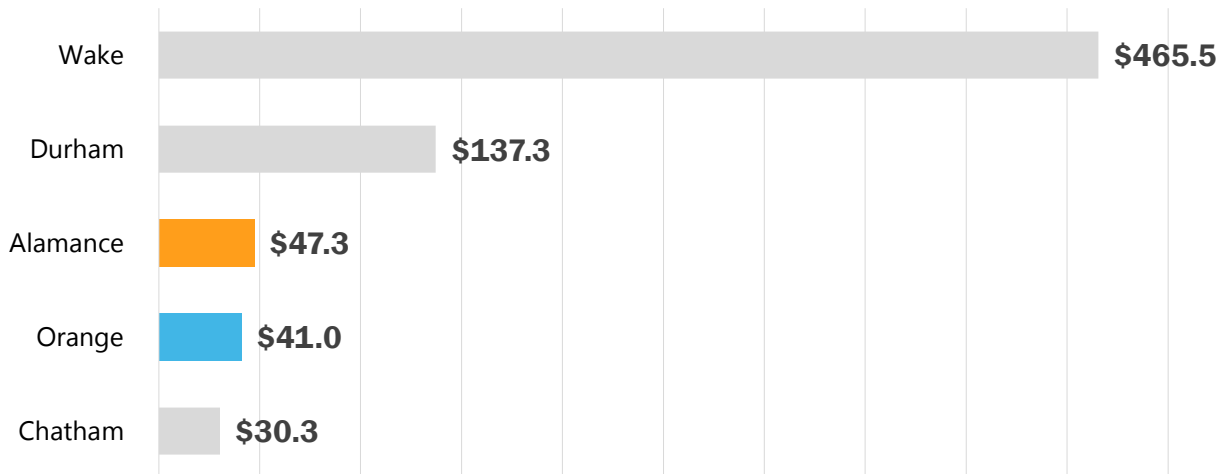


Source: NC Department of Revenue

276

Increase in gross sales tax collections

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

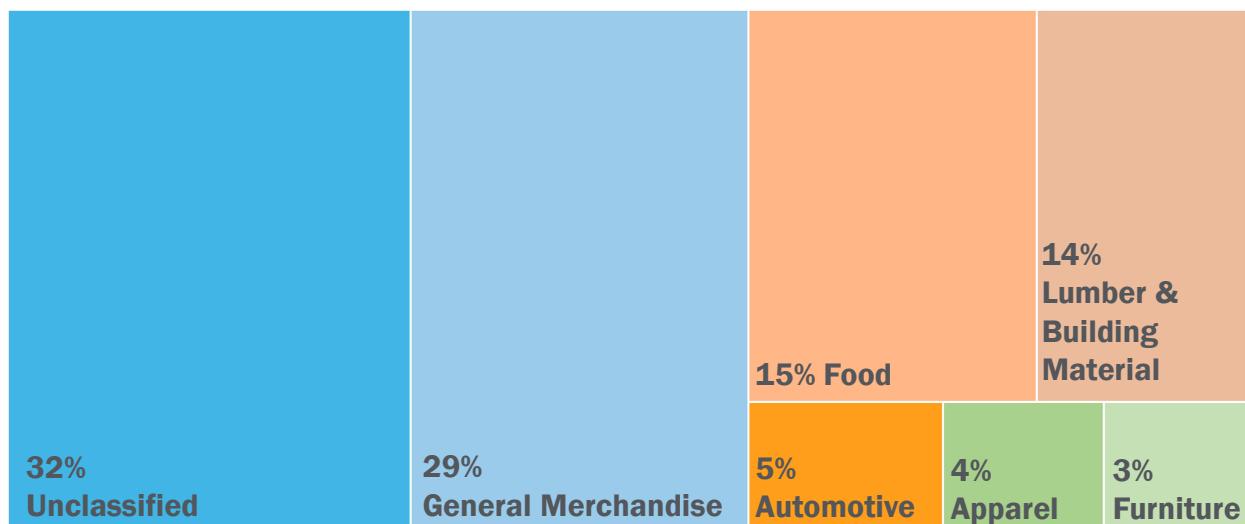


Source: NC Department of Revenue

277

Orange County taxable sales & purchases makeup

Percentage of total taxable sales by type, FY2023

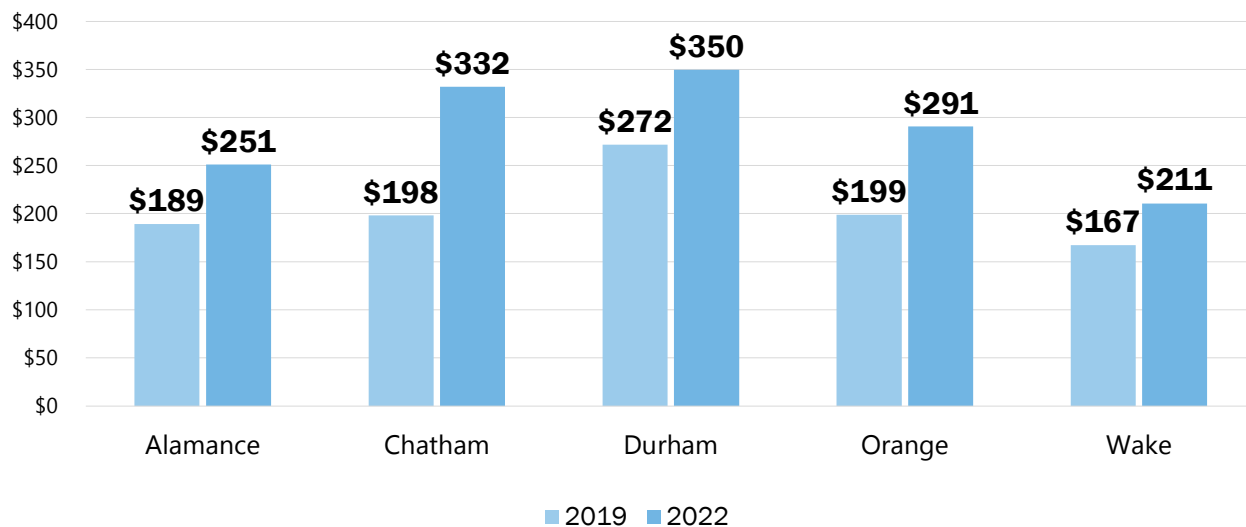


Source: NC Department of Revenue

278

Sales tax per capita, FY2019 vs. FY2022

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

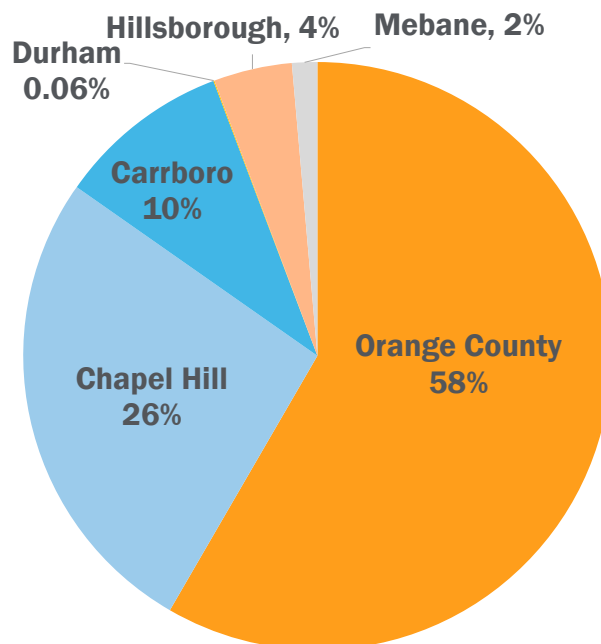


Source: NC Department of Revenue

279

Orange County Sales and Use Tax disbursements

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

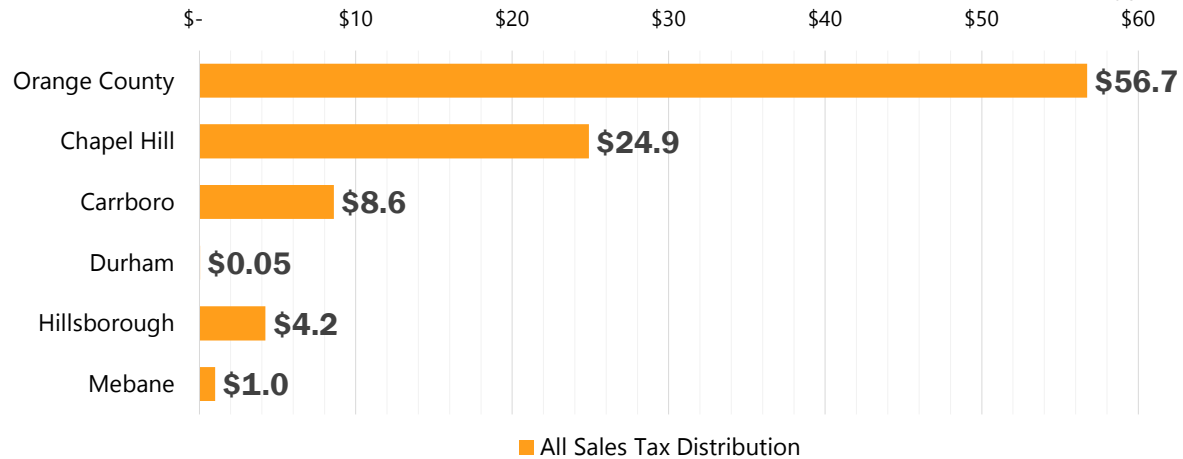


Source: NC Department of Revenue

280

Annual Orange County Sales Tax disbursements (millions)

Orange County Sales Tax disbursements to county and its municipalities – FY2023



“Local Sales and Use Tax” includes Articles 39, 40, 42, 43, 44, 45 and 46 sales taxes.

“All Sales Tax” includes Local Sales and Use tax plus sales tax on tire disposal, white good disposal, electricity, piped natural gas, telecommunications, beer and wine excise, video programming, and solid waste disposal

Source: NC Department of Revenue

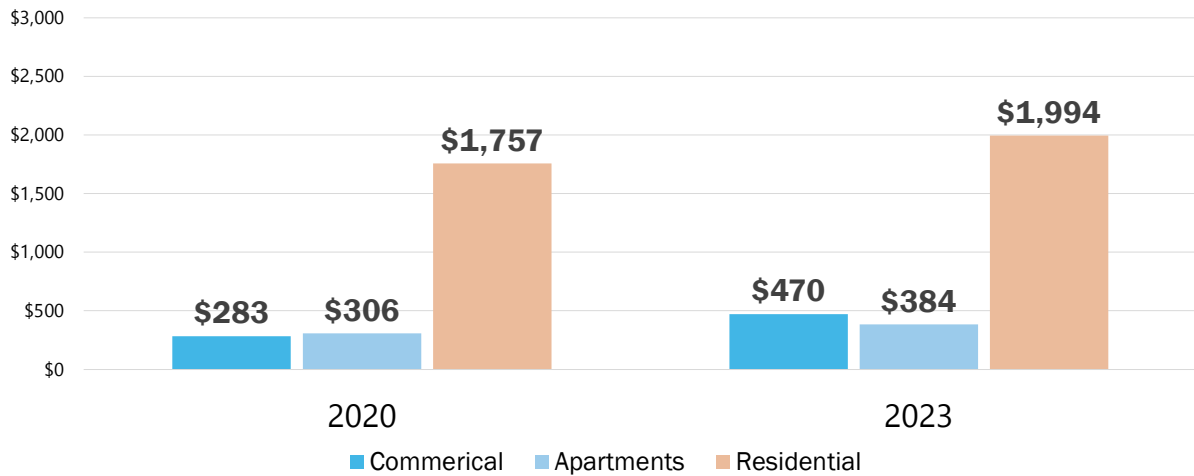
281

Assessed Property Value

282

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

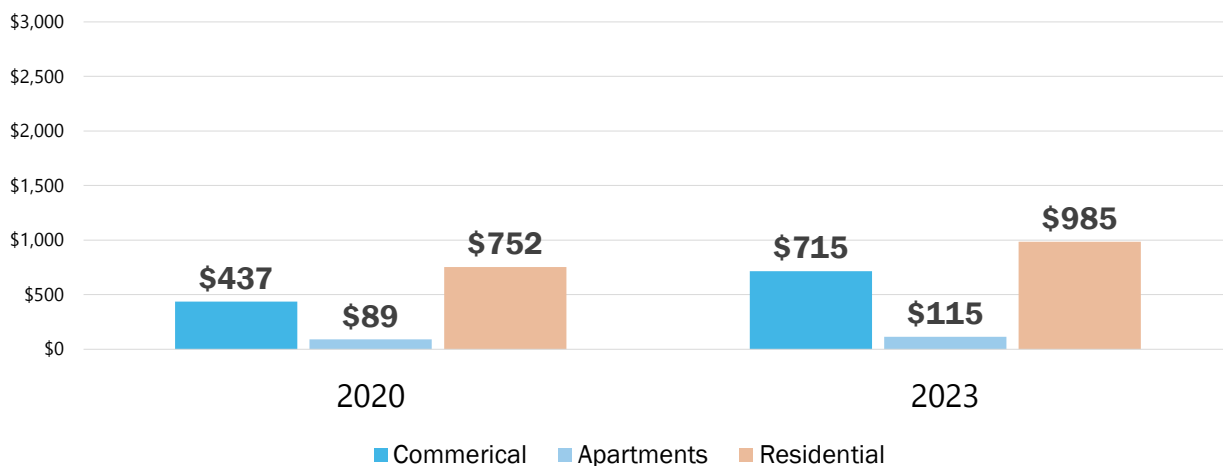


Source: Orange County Tax Assessor

283

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

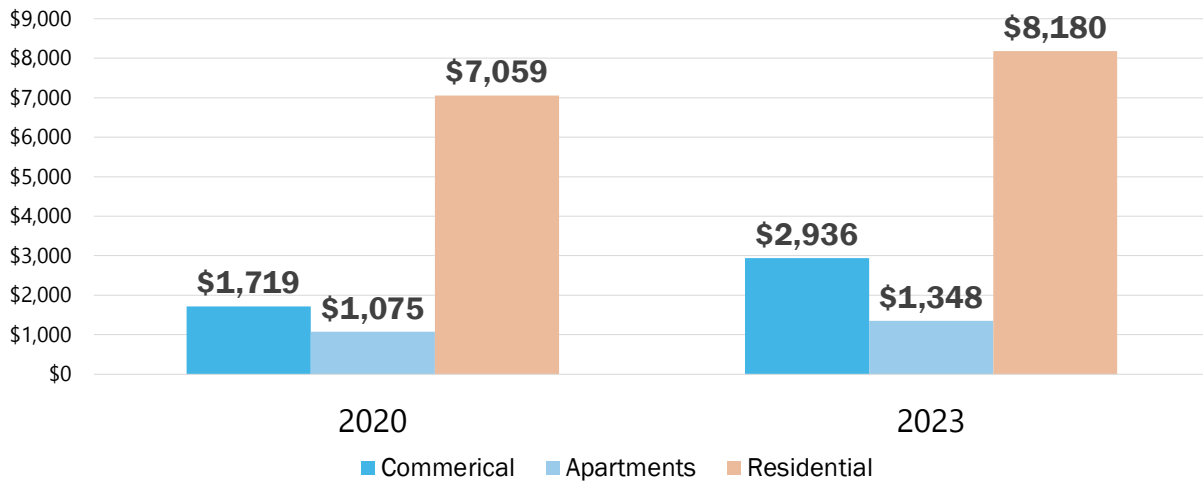
Assessed property value by sector (in millions), 2020 and 2023



Source: Orange County Tax Assessor

284

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

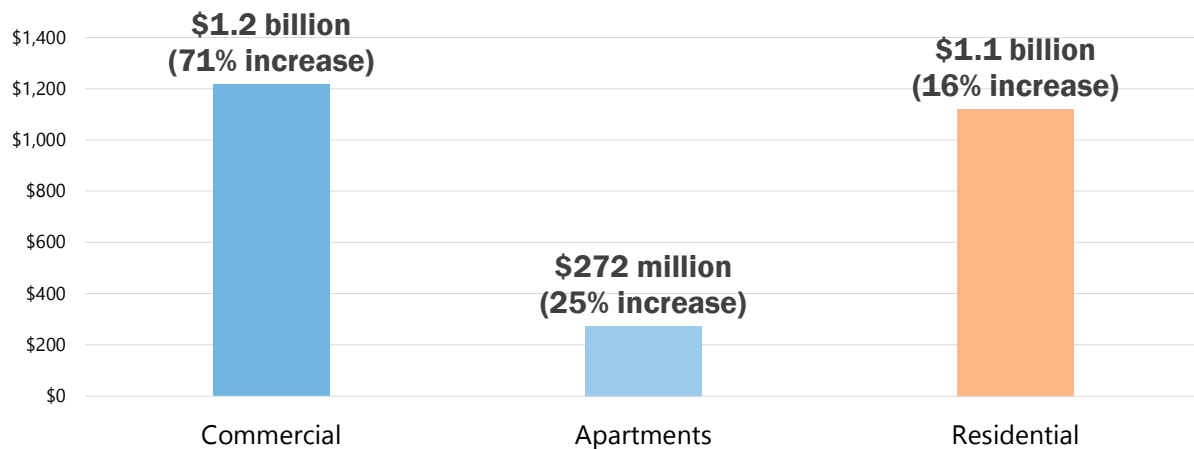


Source: Orange County Tax Assessor

285

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

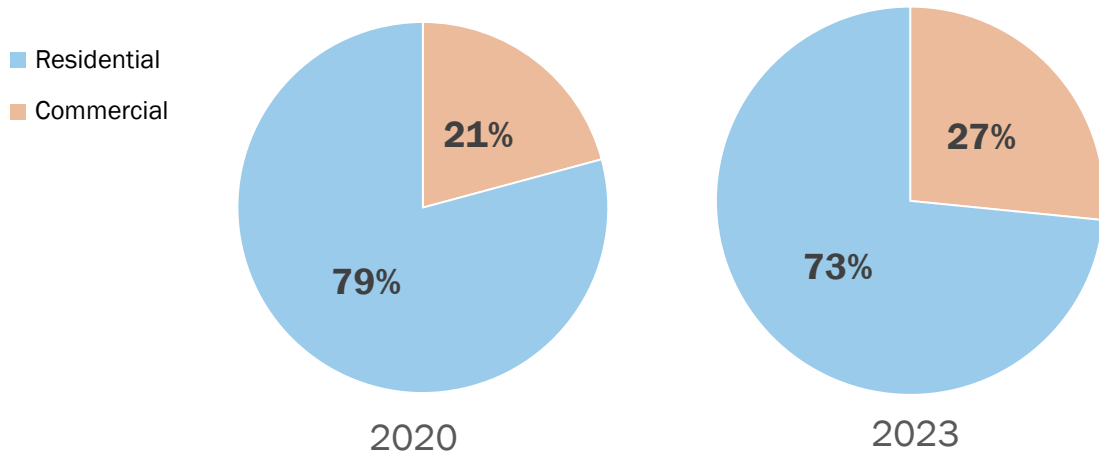
Increase in Chapel Hill assessed value by sector from 2020 to 2023 (in millions)



Source: Orange County Tax Assessor

286

Orange County residential/commercial property value percentages 2020 and 2023

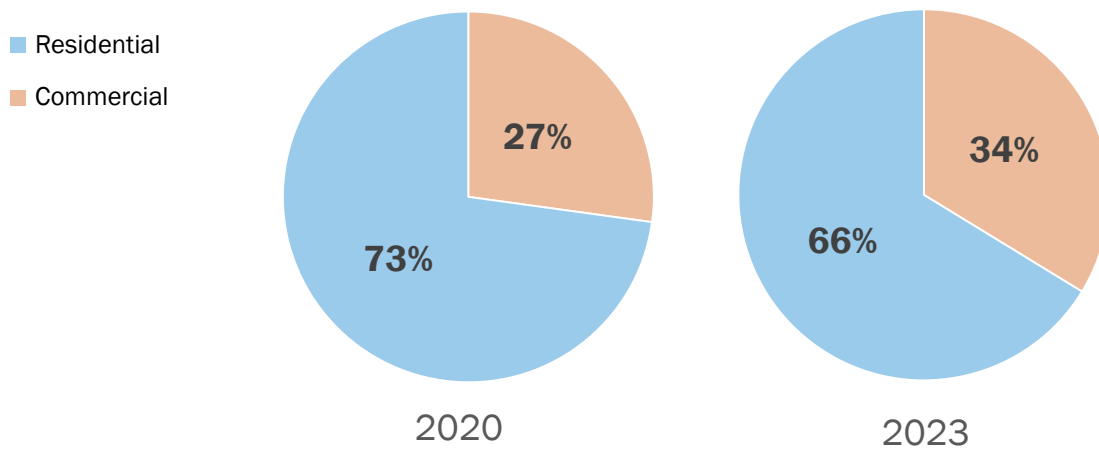


The Orange County Tax Assessor categorizes all assessed property as either commercial or residential. Apartments are divided as well with most categorized as commercial and some as residential.

Source: Orange County Tax Assessor

287

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



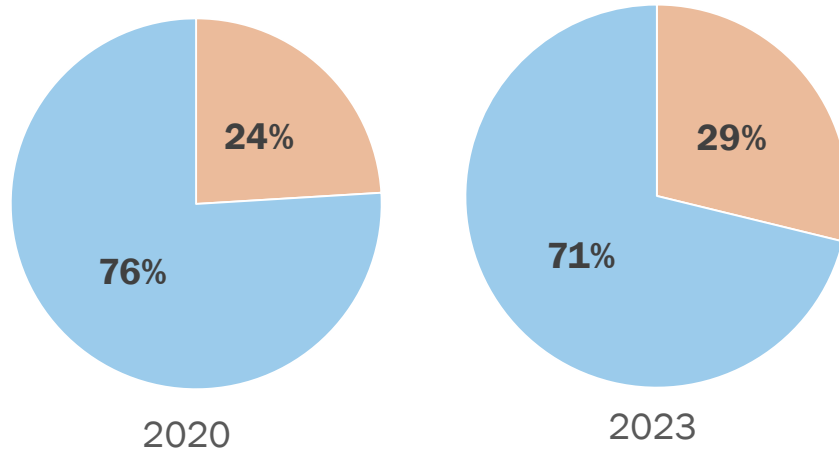
The Orange County Tax Assessor categorizes all assessed property as either commercial or residential. Apartments are divided as well with most categorized as commercial and some as residential.

Source: Orange County Tax Assessor

288

Carrboro residential/commercial property value percentages in 2020 and 2023

■ Residential
■ Commercial



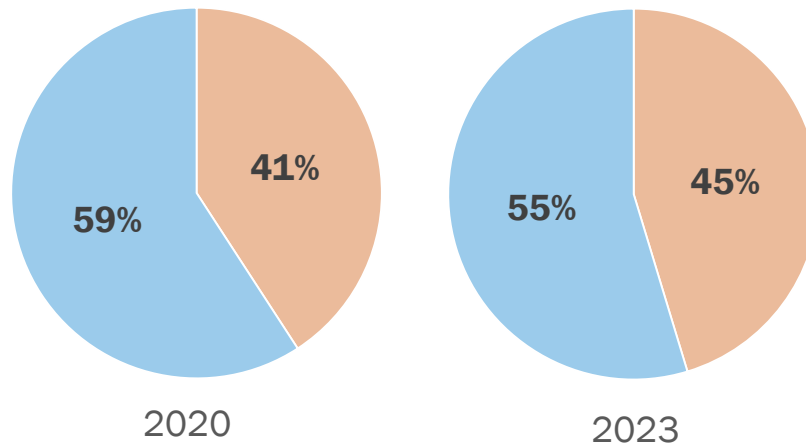
The Orange County Tax Assessor categorizes all assessed property as either commercial or residential. Apartments are divided as well with most categorized as commercial and some as residential.

Source: Orange County Tax Assessor

289

Hillsborough residential/commercial property value percentages in 2020 and 2023

■ Residential
■ Commercial



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

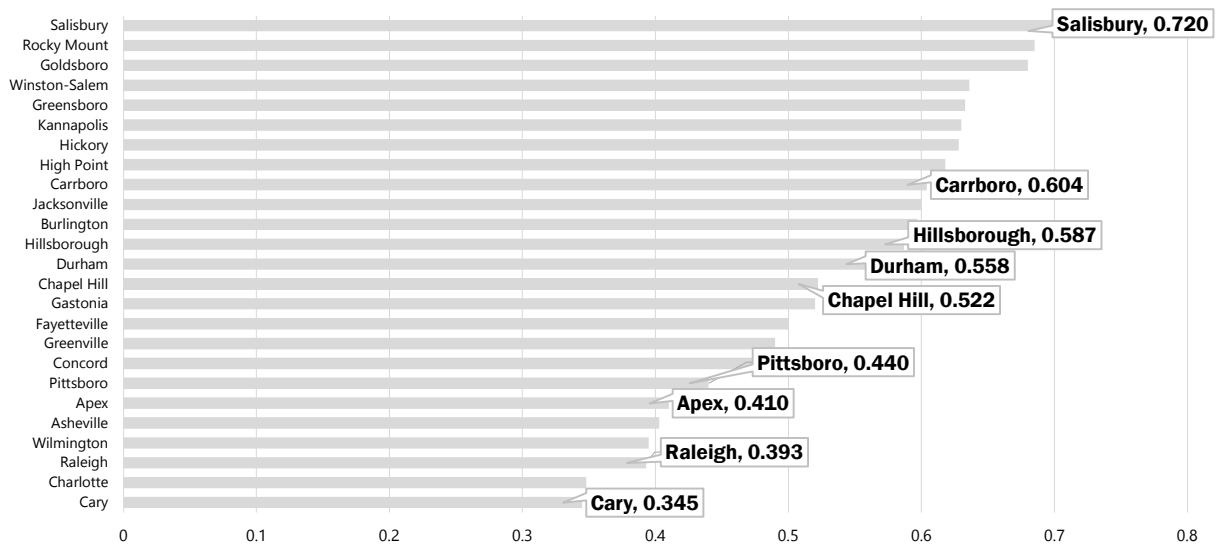
290

Property Tax & Tax Rates

291

North Carolina municipal tax rates vary widely

Municipal property tax rates, FY2022-23

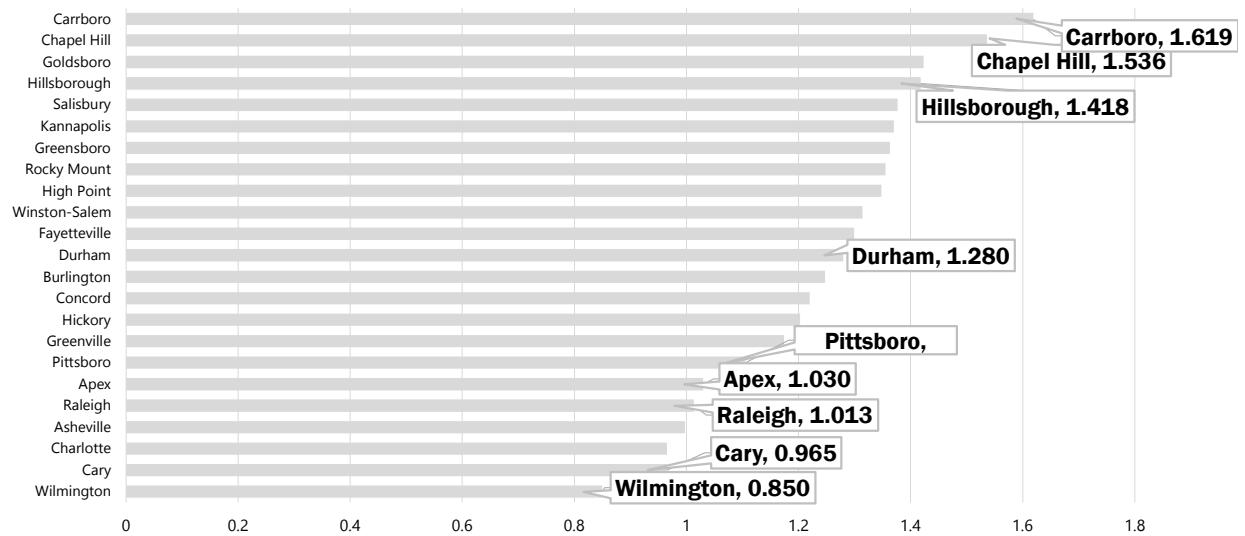


Source: NC Department of Revenue; Zillow

292

Local jurisdictions have highest combined property tax rate

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

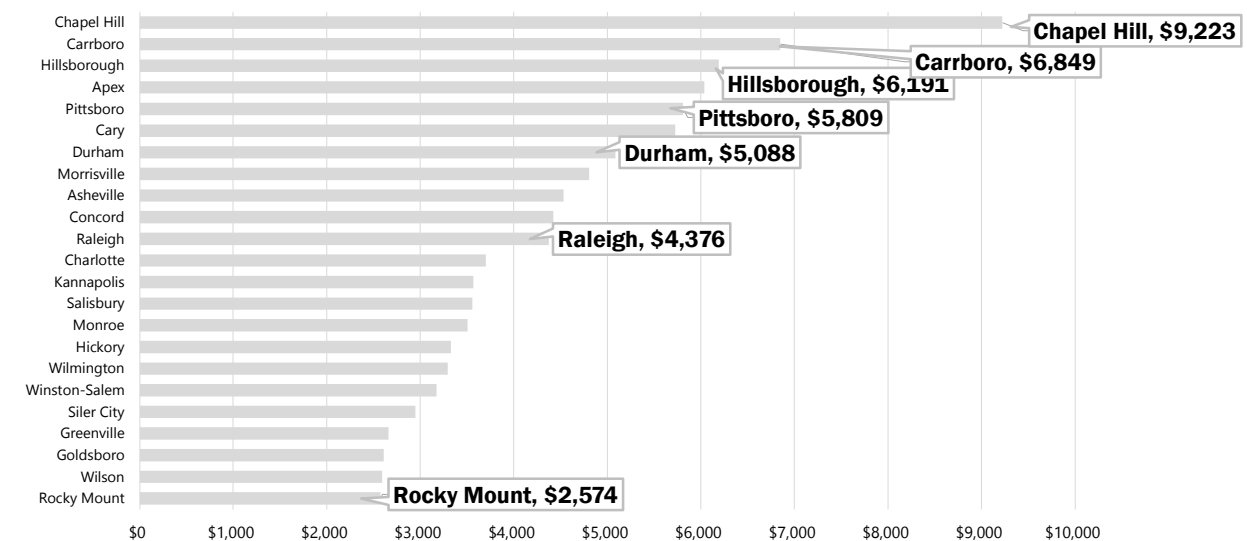


Source: NC Department of Revenue; Zillow

293

Average Median property tax bill

Combined local property tax rates (FY2022-23) assessed on local median home value, June 2023



Source: NC Department of Revenue; Zillow

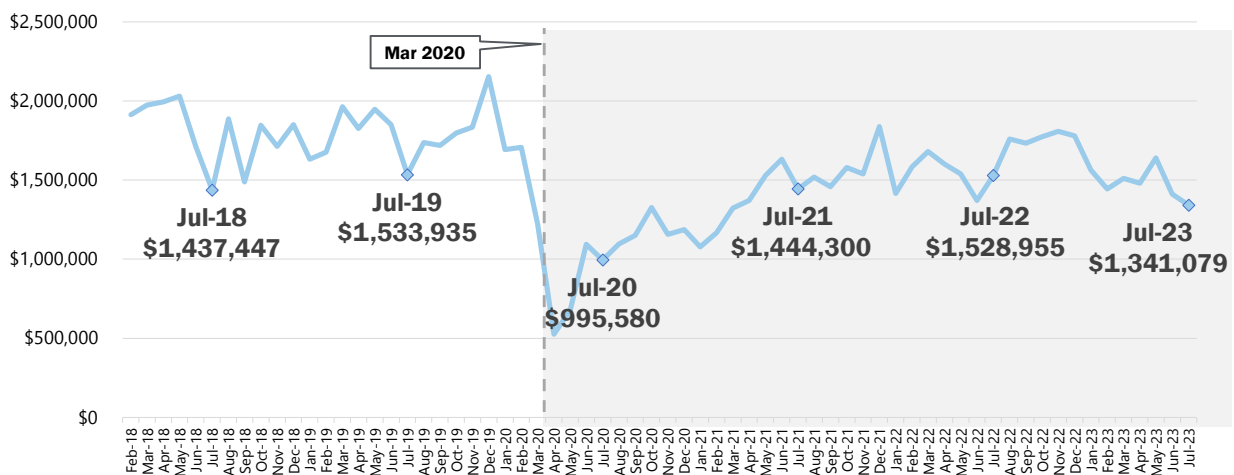
294

Chamber Small Business Index

295

Chamber Small Business Index: monthly credit card transactions

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

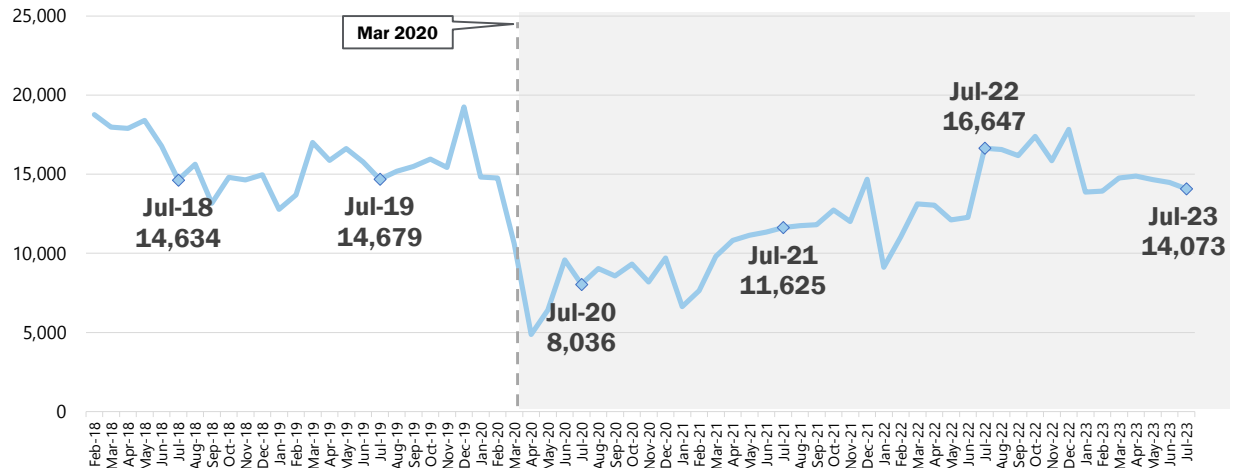


Source: The Chamber's 40-Business Index

296

Chamber Small Business Index: monthly credit card transactions

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

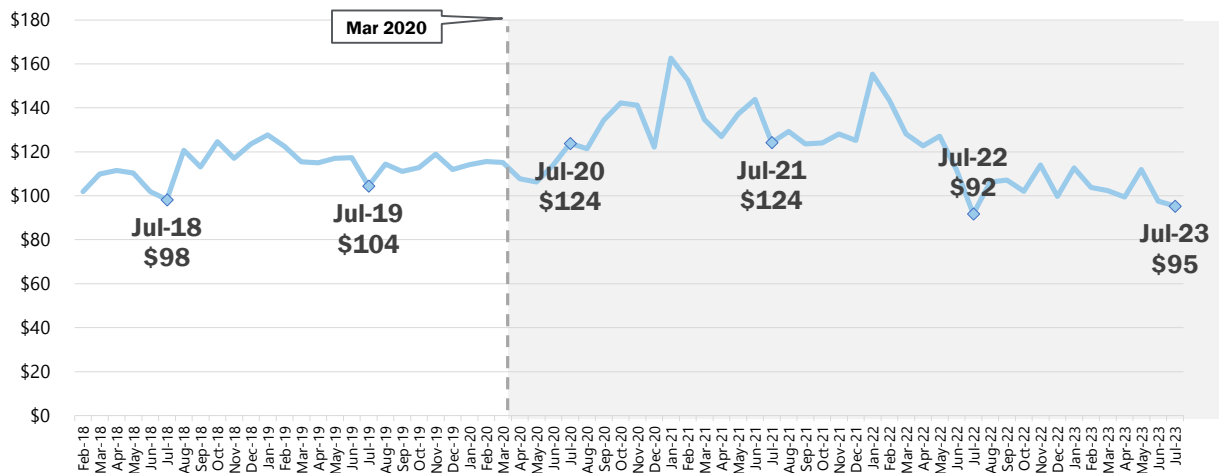


Source: The Chamber's 40-Business Index

297

Chamber Small Business Index: Average value per credit card transaction

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



Source: The Chamber's 40-Business Index

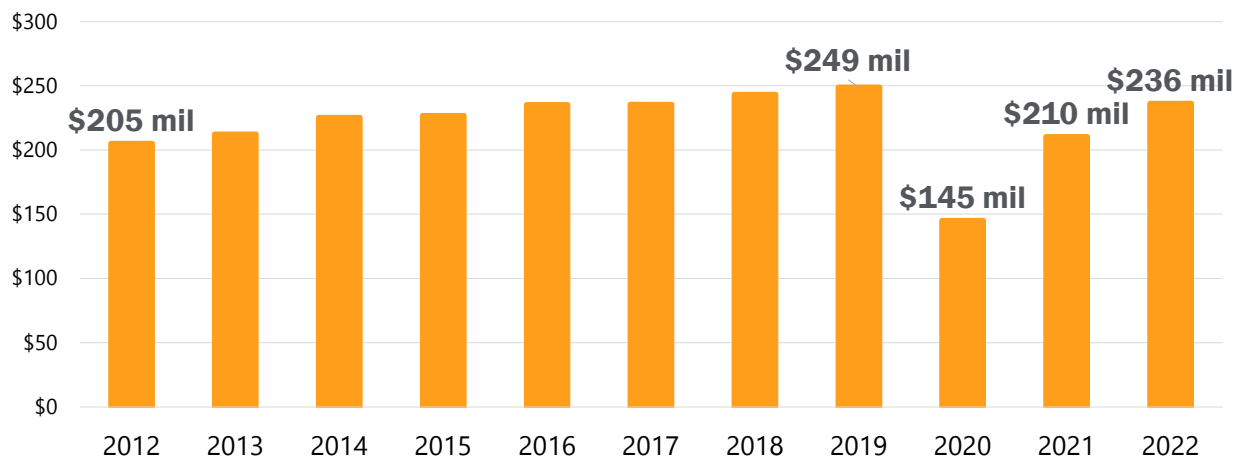
298

Tourism & Hospitality

299

Orange County domestic visitor expenditures

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

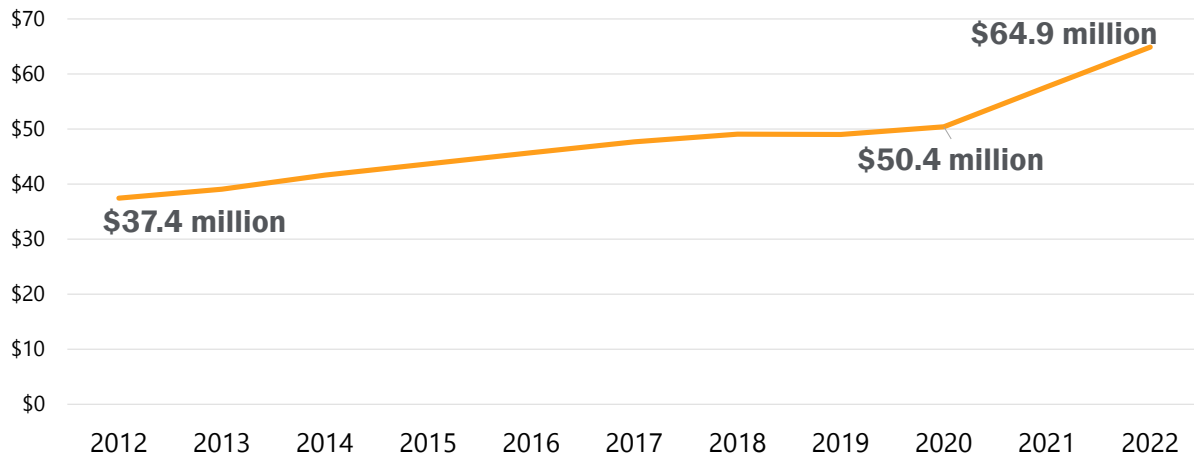


Source: Visit North Carolina

300

Orange County tourism labor payroll

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

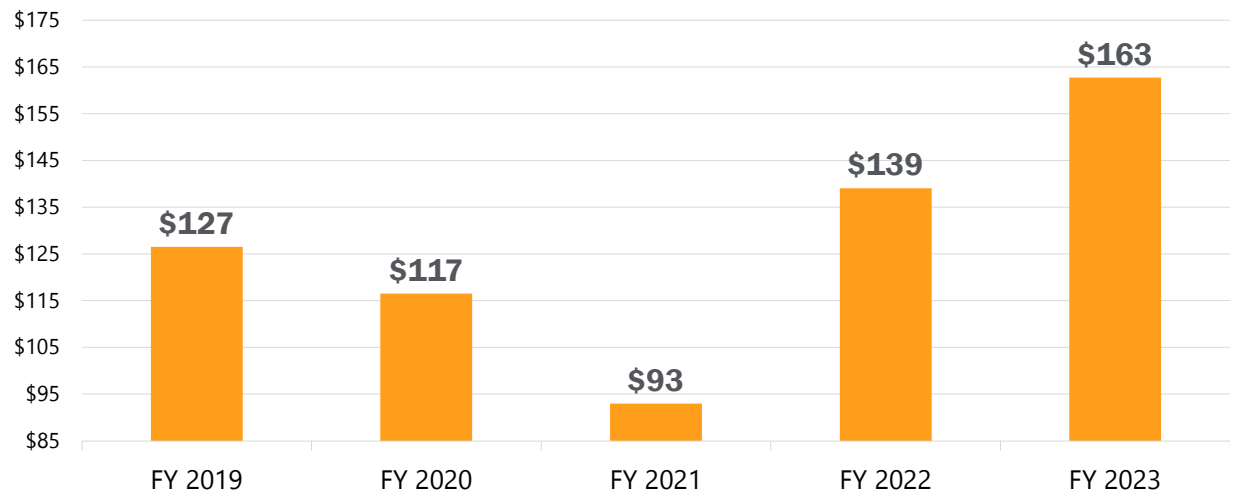


Source: Visit North Carolina

301

Orange County hotels average daily rate

County average daily hotel room rate, FY2019-FY2023

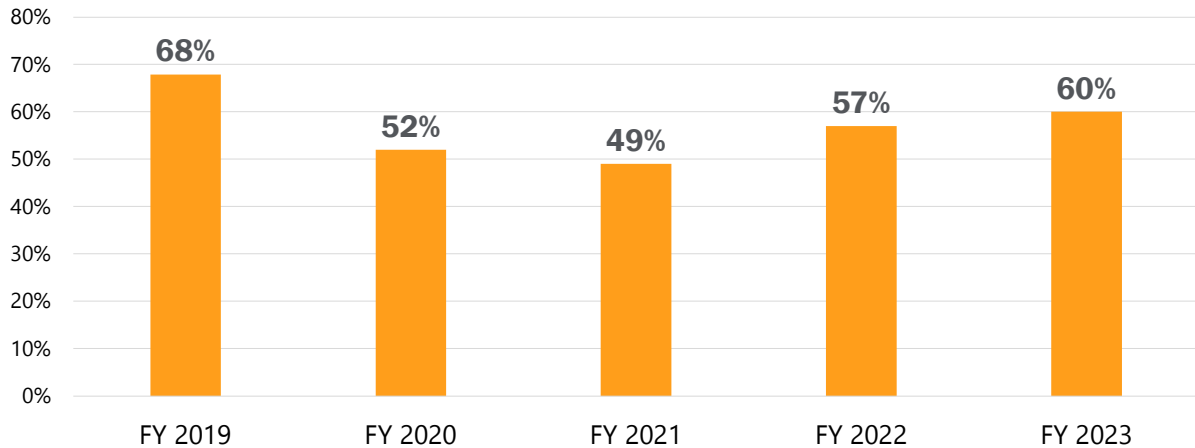


Source: Chapel Hill/Orange County Visitors Bureau

302

Orange County hotels average daily occupancy

County average daily hotel occupancy rate, FY2019-FY2023

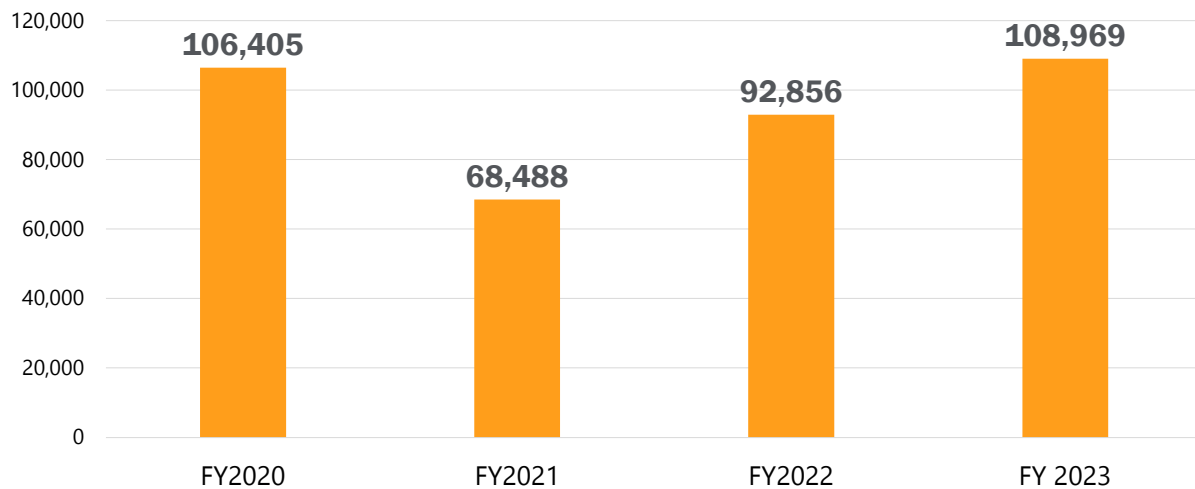


Source: Chapel Hill/Orange County Visitors Bureau

303

Annual Orange County STRs room supply

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

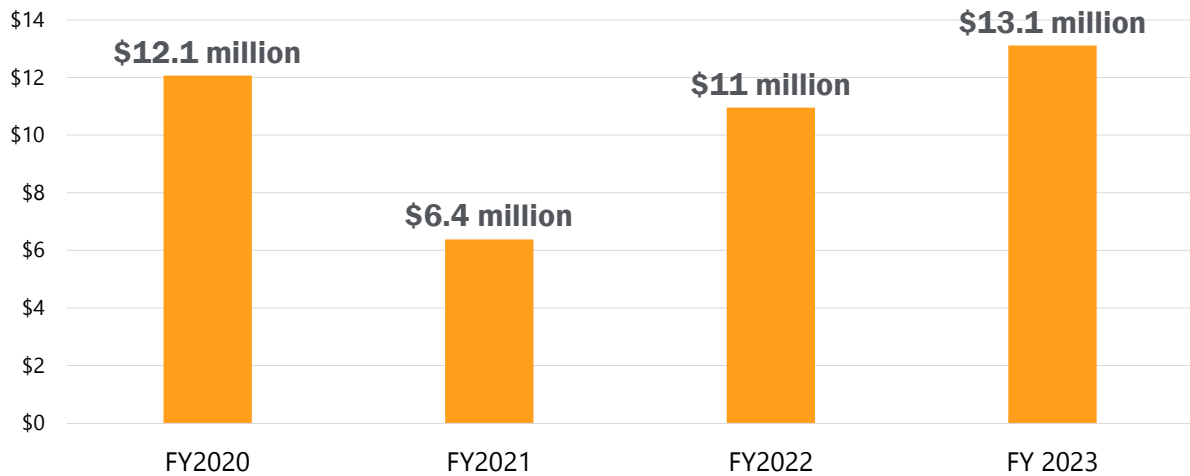


Source: Orange County Visitors Bureau

304

Orange County STR annual revenue

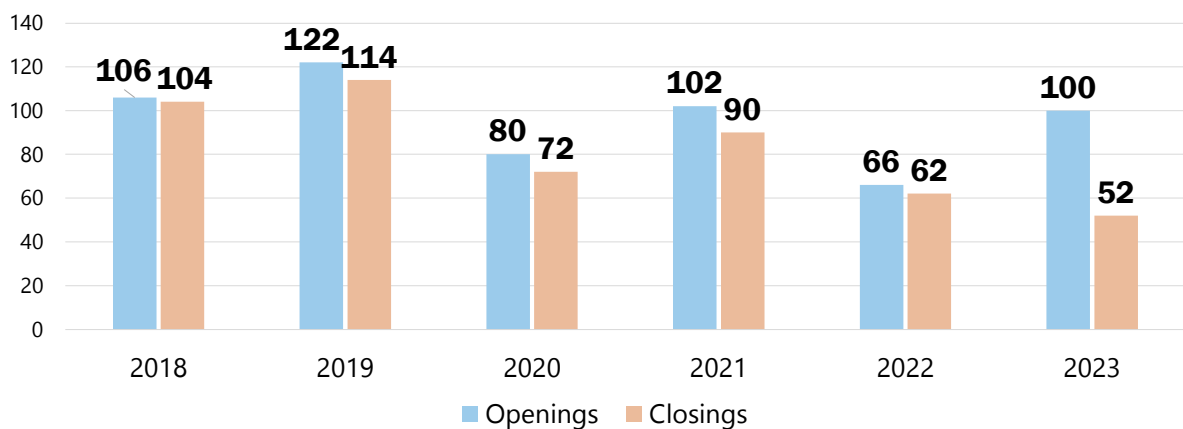
Annual rental revenue from Short-Term Rental (STR) properties (i.e., AirBnB, VRBO)



Source: Orange County Visitors Bureau

305

Orange County restaurant and food service establishments openings and closings

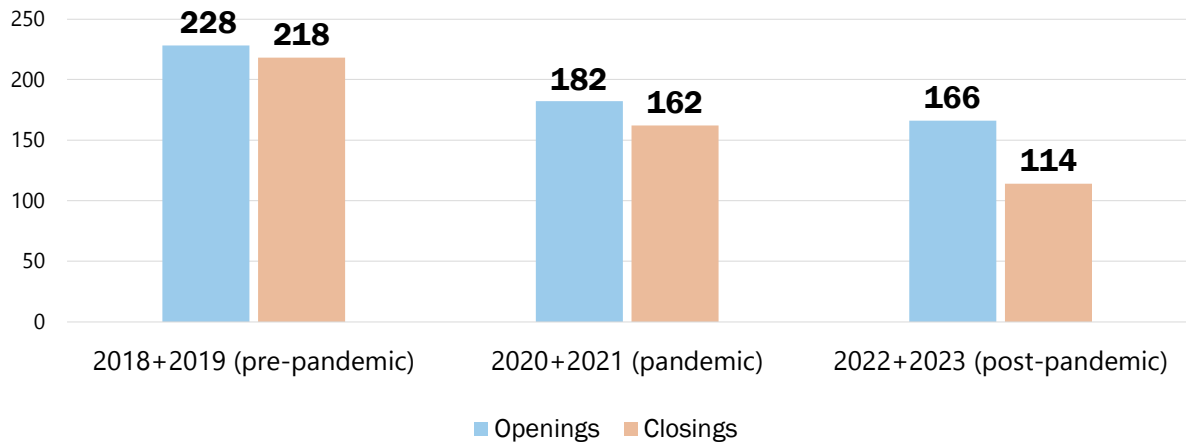


Source: Orange County Health Department

306

Orange County restaurant and food service establishments openings and closings

Combined openings and closings for the two-year periods as provided by the Orange County Health Department



Source: Orange County Health Department

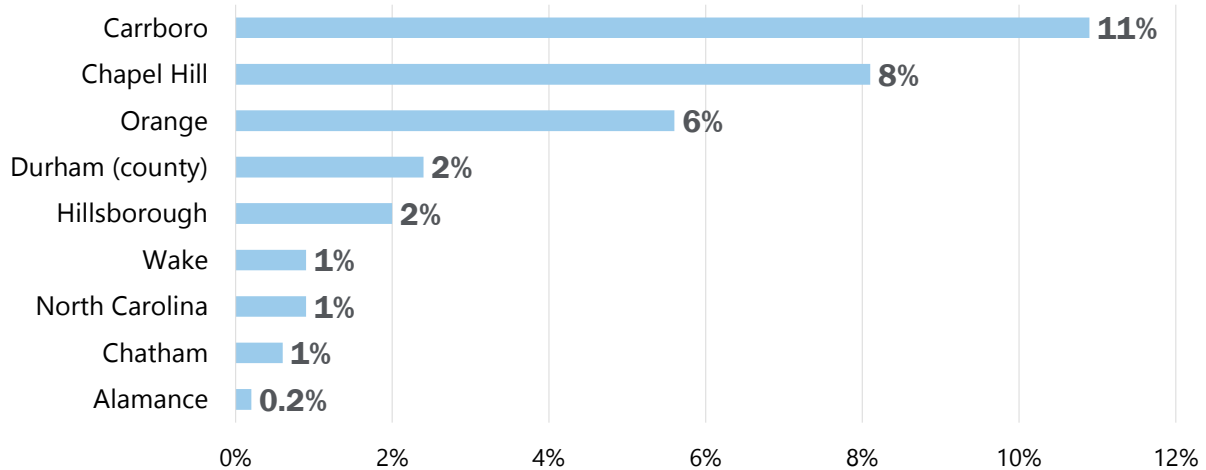
307

Transit and Transportation

308

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

Percent of working residents who report taking public transportation to work

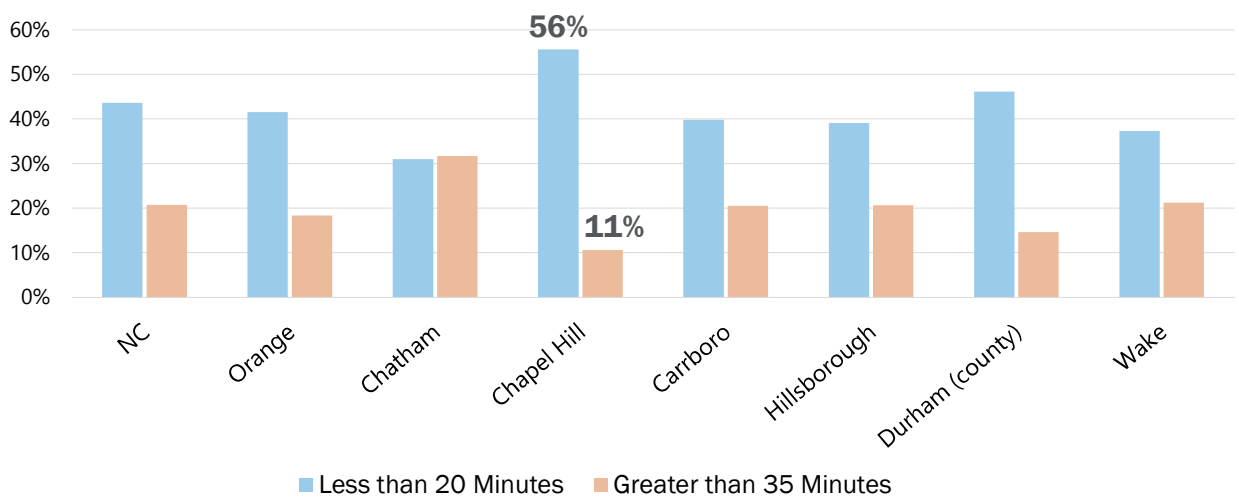


Source: American Community Survey (2017-2021 5-Year Estimates)

309

Chapel Hill workers have shorter commutes

Average commute length in minutes

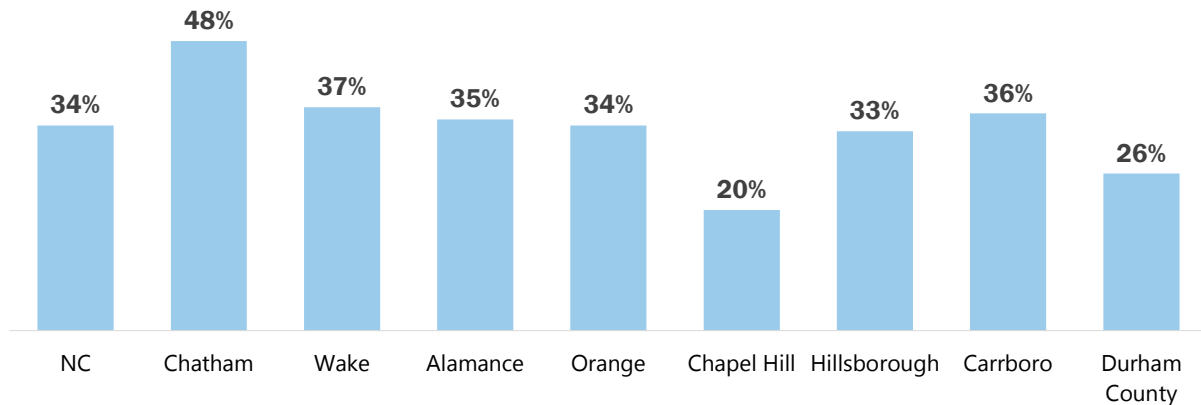


Source: American Community Survey (2017-2021 5-Year Estimates)

310

48% of Chatham workers driving alone commute more than 30+ minutes

Percent of workers who drive alone and have a 30+ minute commute

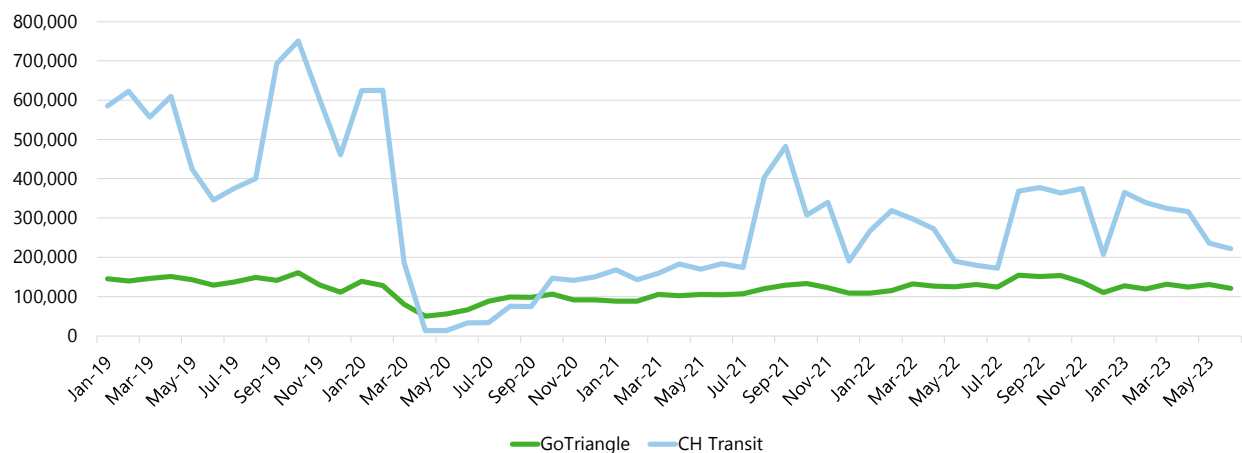


Source: American Community Survey (2017-2021 5-Year Estimates)

311

Pandemic impact on Chapel Hill Transit and Go-Triangle Ridership

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

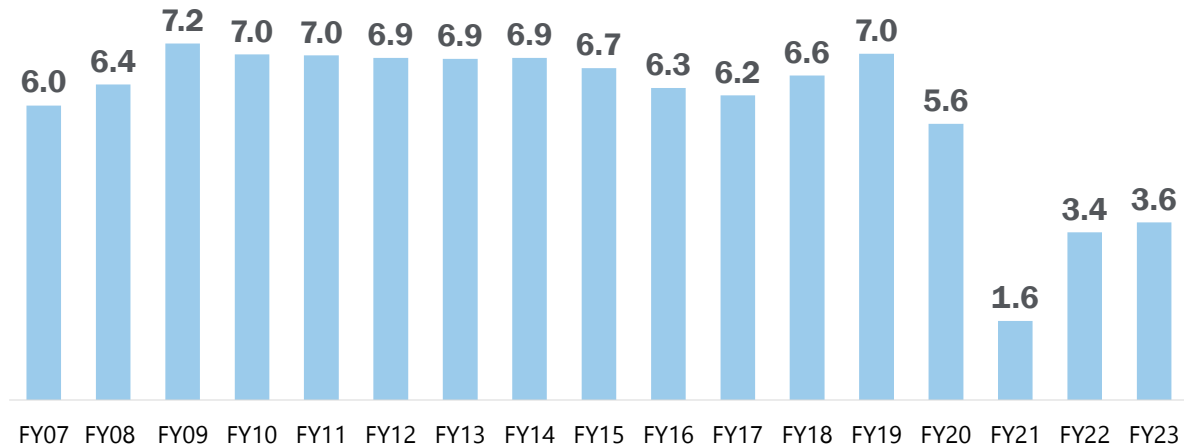


Source: CH Transit, GoTriangle

312

Chapel Hill Transit ridership rebounding; still below 2019 peak

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

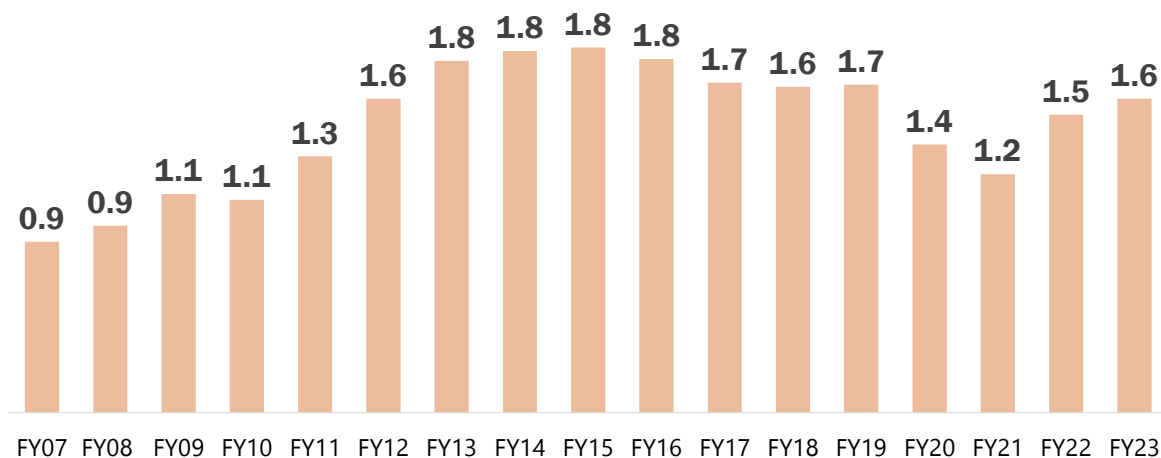


Source: Chapel Hill Transit

313

2023 GoTriangle ridership approaches pre-pandemic levels

Annual GoTriangle ridership from FY2007 – FY2023 (in millions)

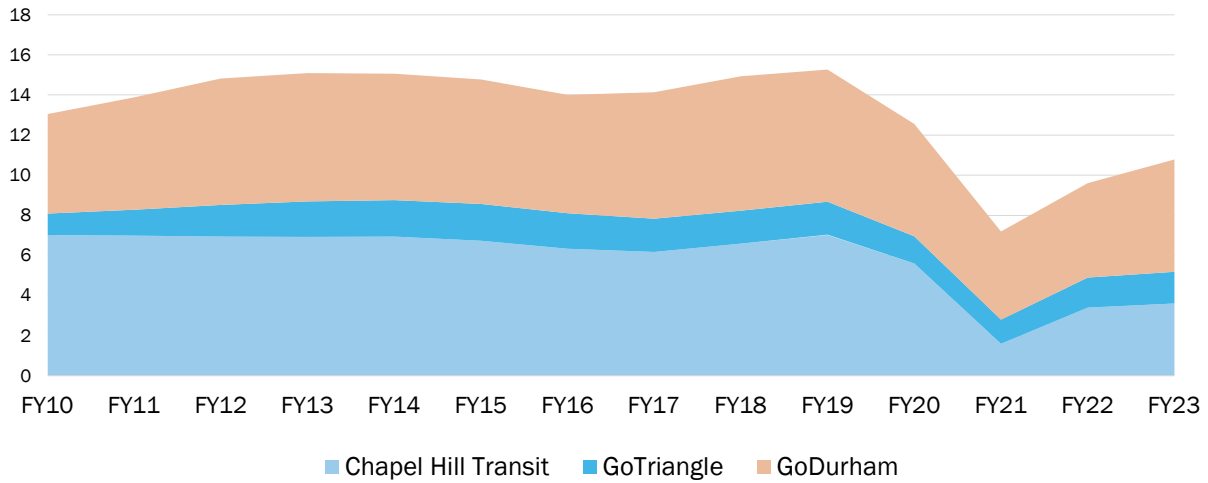


Source: GoTriangle

314

Combined CHT, GoTriangle, and Go Durham ridership

Annual transit ridership (in millions), FY2007-FY2023



Source: Chapel Hill Transit, GoTriangle, GoDurham

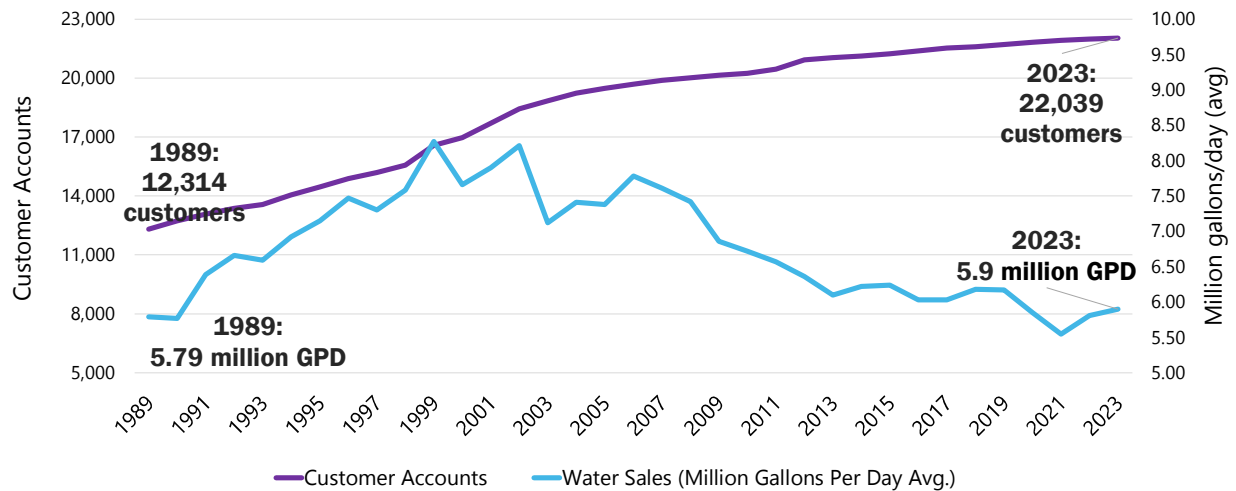
315

Environment:

- Water
- Recycling
- Solar
- Protected Land

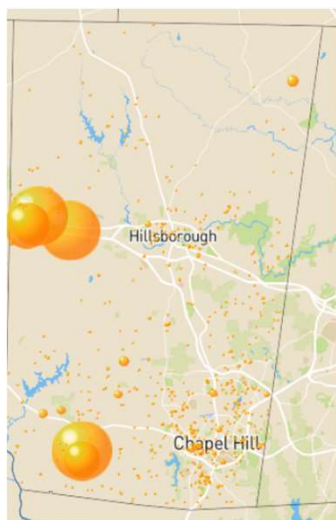
316

OWASA total customer accounts & daily water sales

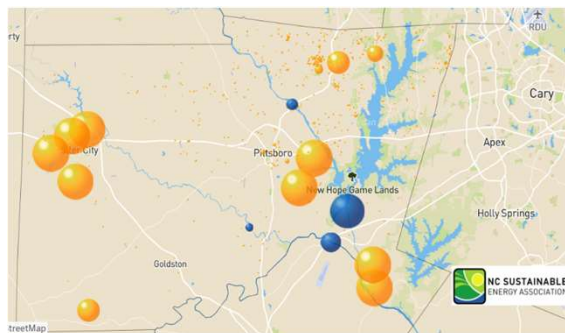


317

Solar installations



Orange



Chatham

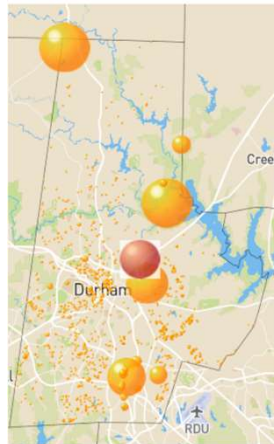
Source: NC Sustainable Energy Association, 2023

318

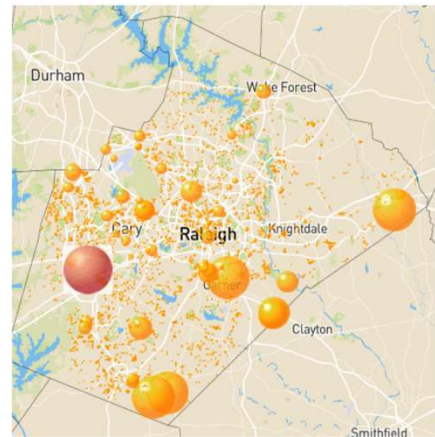
Solar installations



Alamance



Durham

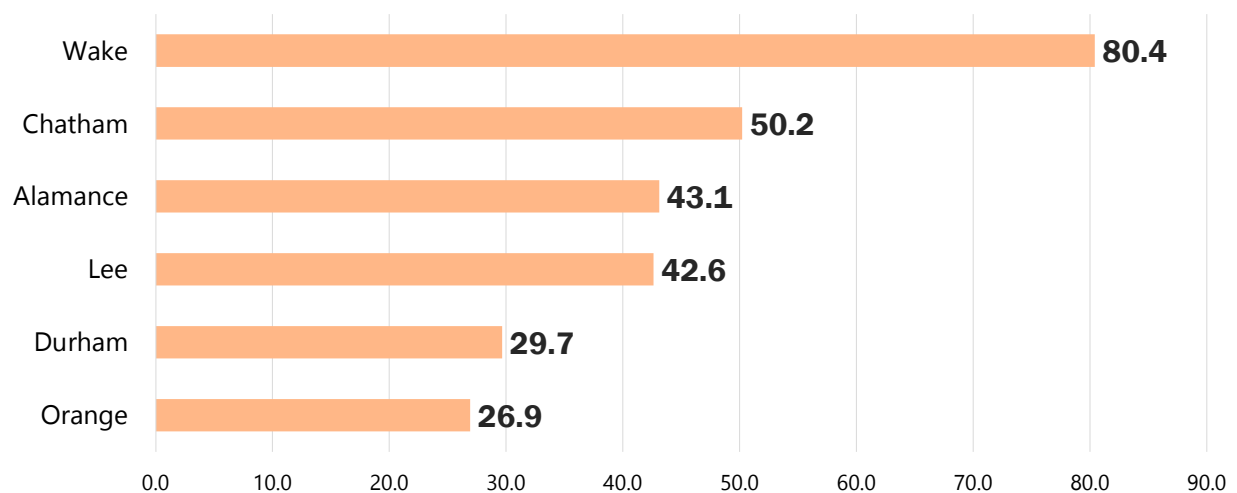


Wake

Source: NC Sustainable Energy Association, 2023

319

County solar energy capacity (megawatts)



Source: NC Sustainable Energy Association, 2023

320

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)

321

Common household recyclables per capita recovery

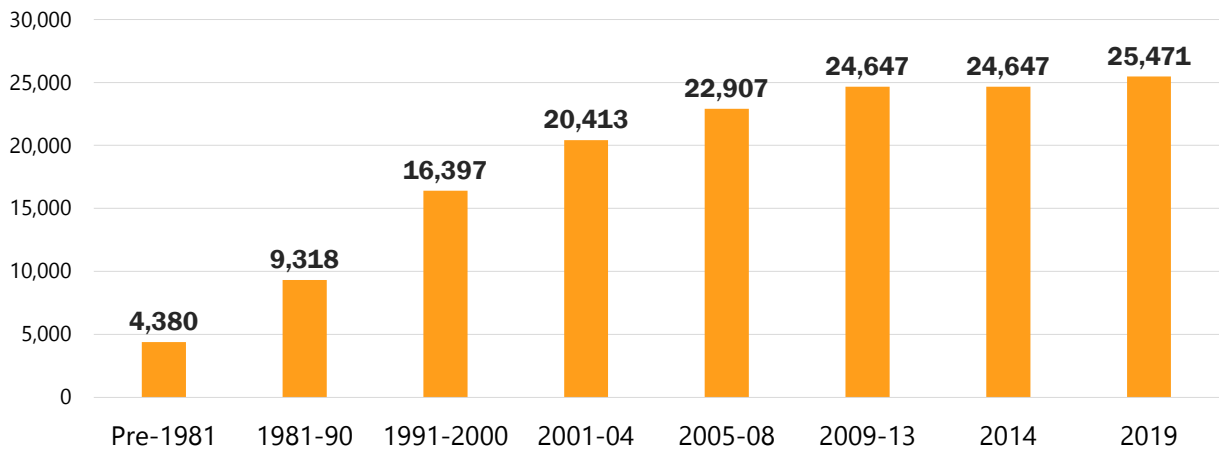
2022

NC Rank	County	lbs/Person
1	Wilson	285
4	Orange	184
12	Durham	141
26	Lee	100
28	Wake	98
37	Alamance	78
46	Chatham	67

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

322

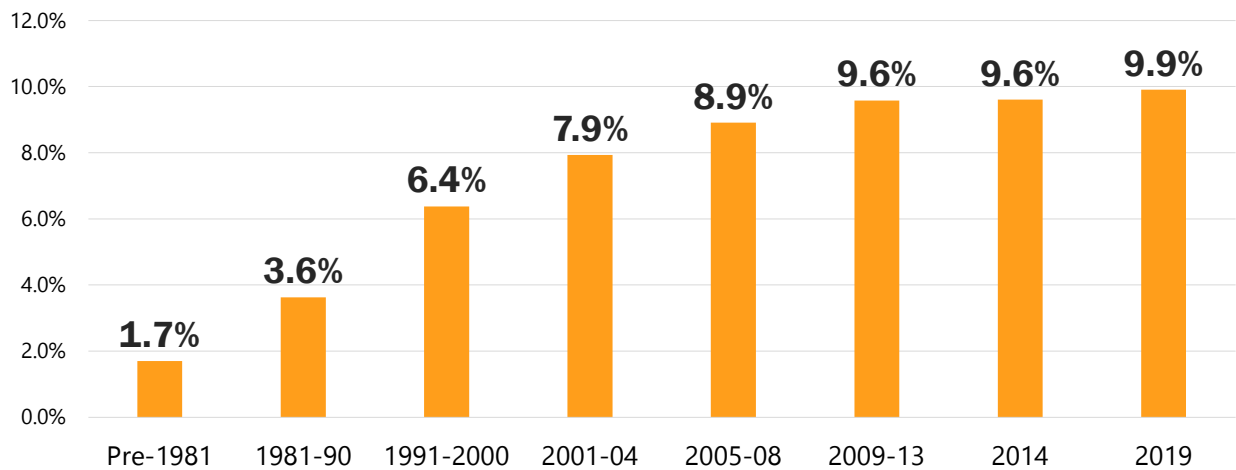
Orange County protected land acreage



Source: Orange County Government, 2019 State of the Environment Report

323

Percent of Orange County land protected



Source: Orange County Government, 2019 State of the Environment Report

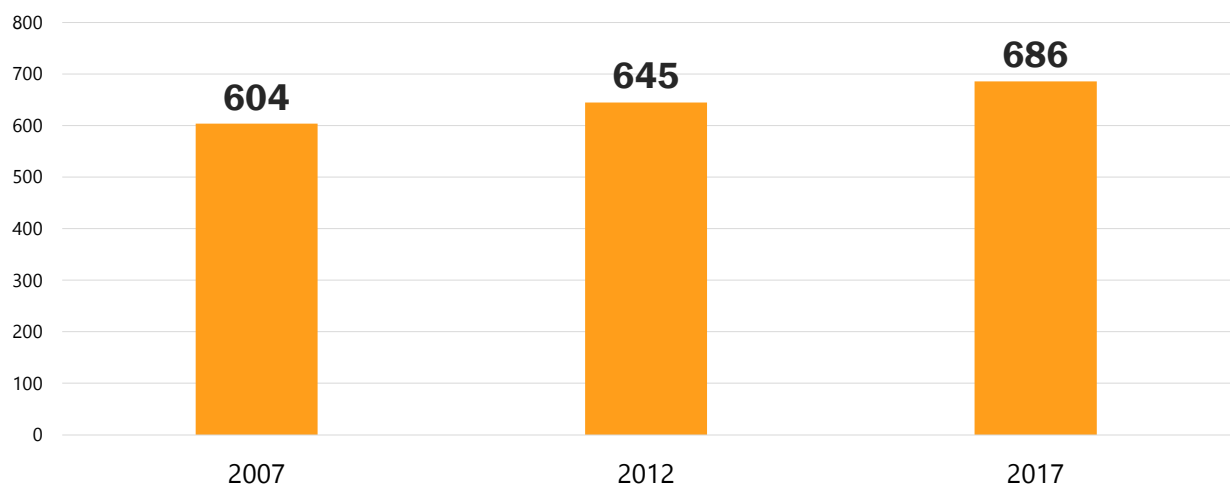
324

Farming

325

Number of Orange County farms increasing

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

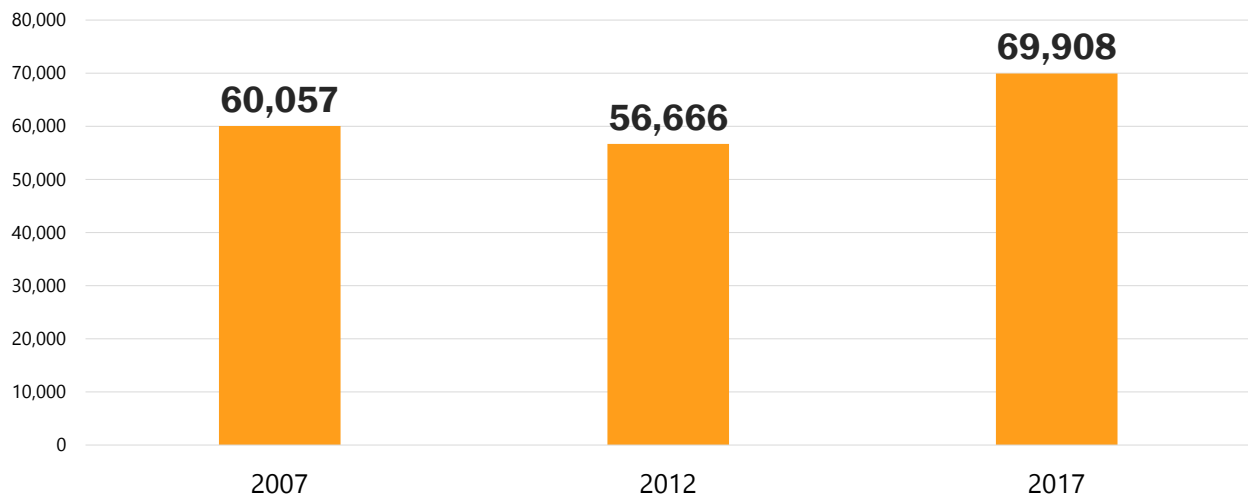


Source: US Department of Agriculture

326

Orange County farmland

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



Source: US Department of Agriculture

327

Orange County Black & African American farm operations and acres farmed

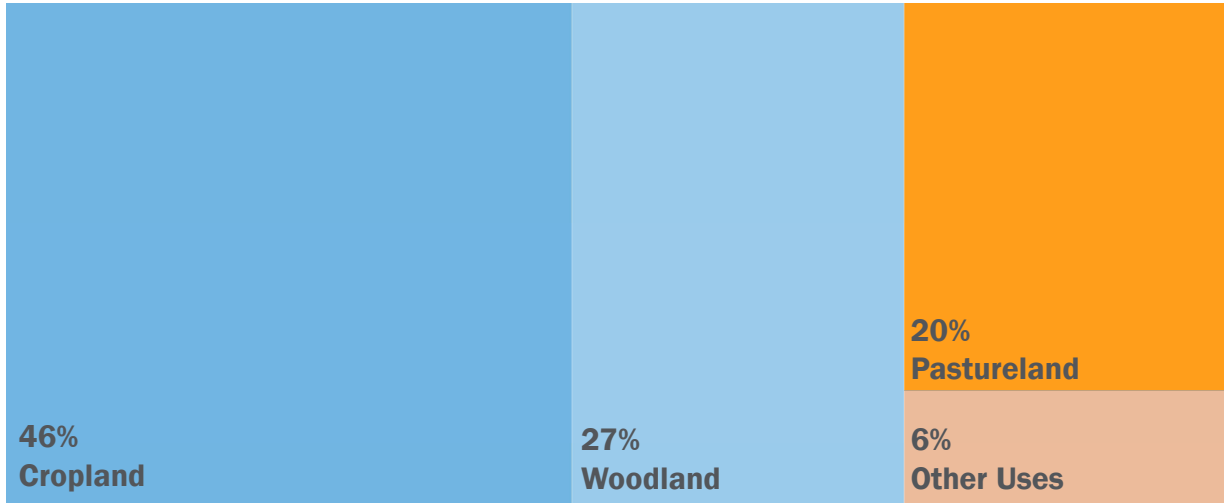
USDA's Census of Agriculture: total number of farms in Orange County, 2002, 2007, 2012, 2017



Source: US Department of Agriculture

328

Orange County land in farms by use (2017)



Source: US Department of Agriculture

329

Orange County hired farm labor

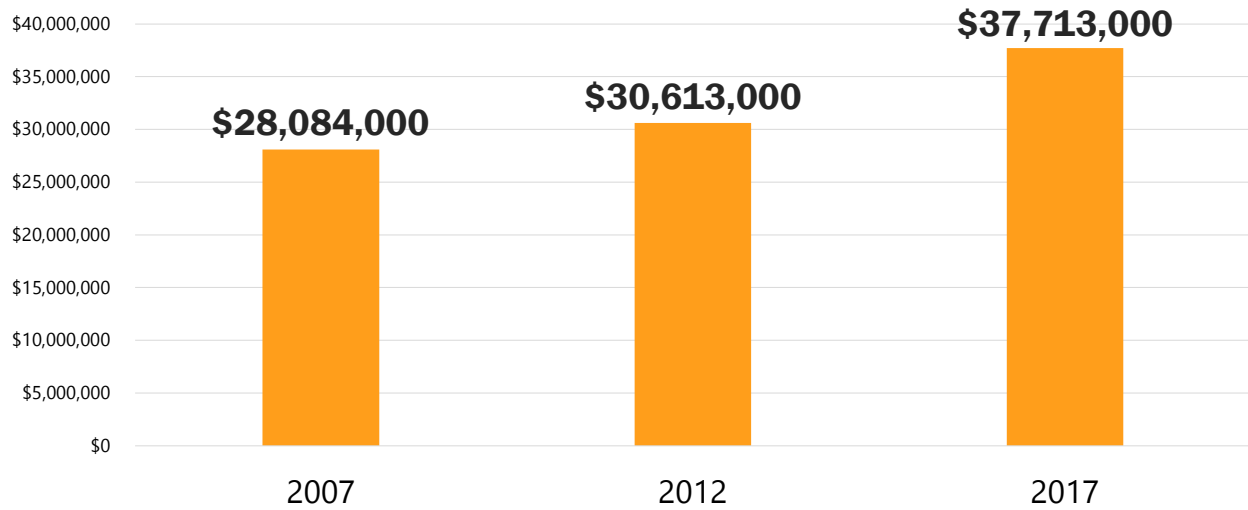
	Farms with Workers	Workers	Annual Wages
2002	232	774	\$3,383,000
2007	153	700	\$4,460,000
2012	203	656	\$6,059,000
2017	206	824	\$7,358,000

Source: US Department of Agriculture

330

Market value of Orange County products sold

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



Source: US Department of Agriculture

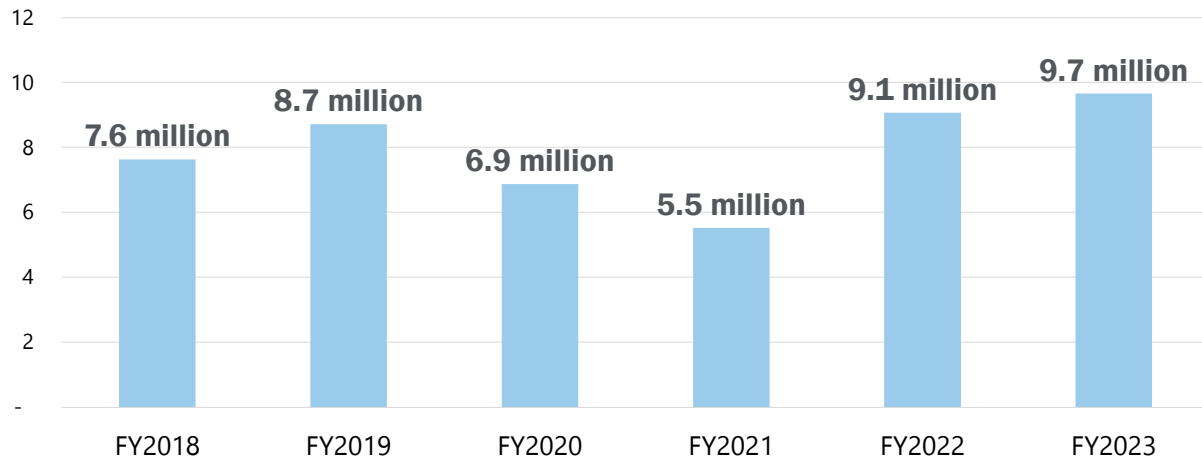
331

Downtown Chapel Hill

332

Downtown Chapel Hill pedestrian activity sets a new annual record with 9.7 million downtown in FY2023

Annual pedestrian counts, FY2018 – FY2023

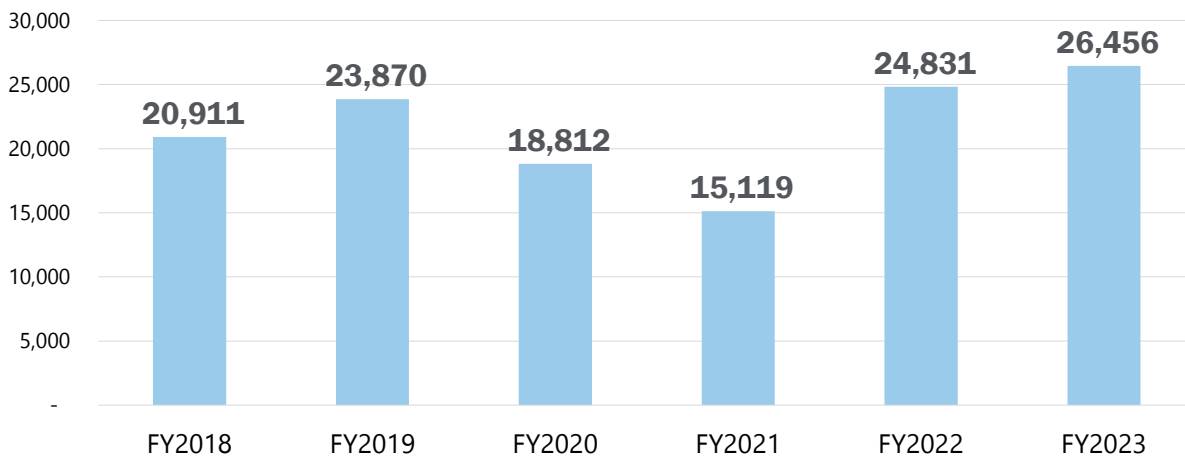


Source: placer.ai via Chapel Hill Downtown Partnership

333

Downtown Chapel Hill averaged more than 26,000 people a day in downtown in FY2023

Average number of pedestrians per day, FY2018 – FY2023



Source: placer.ai via Chapel Hill Downtown Partnership

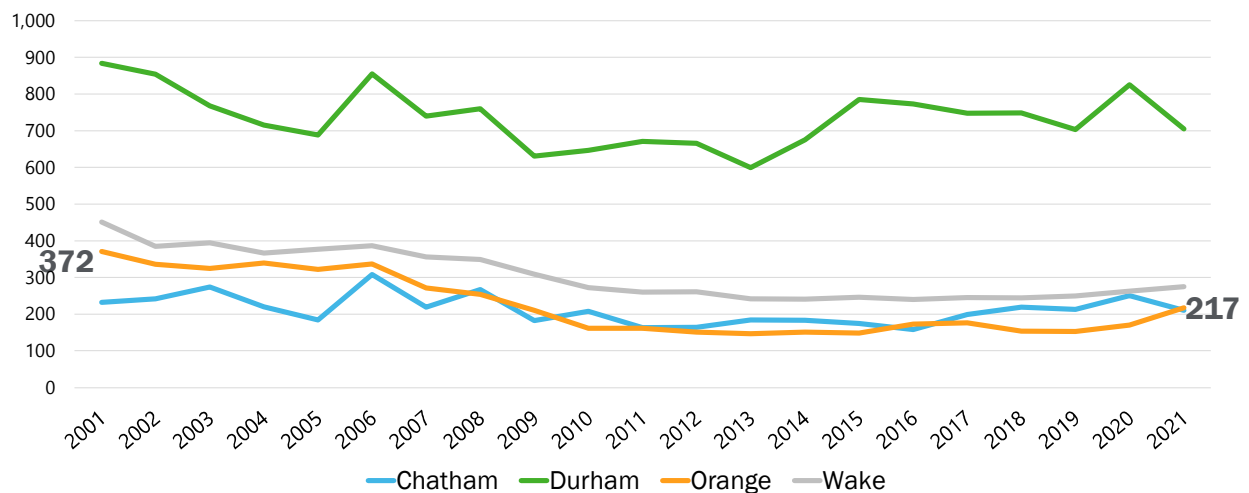
334

Crime

335

Violent crime down since 2001, but up from 2016

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

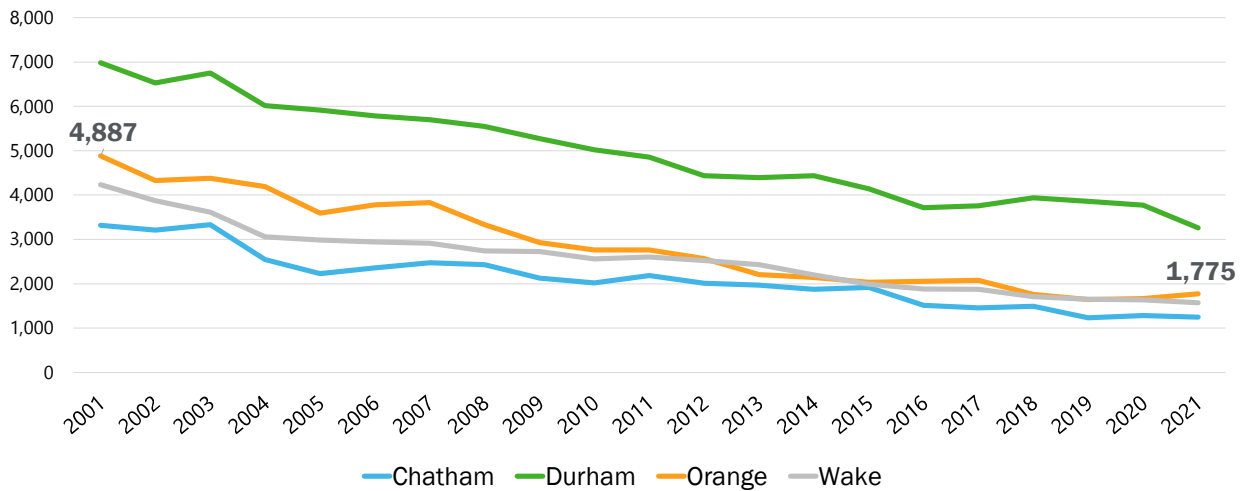


Source: NC State Bureau of Investigation

336

Property crime falls consistently with slight uptick in 2021

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

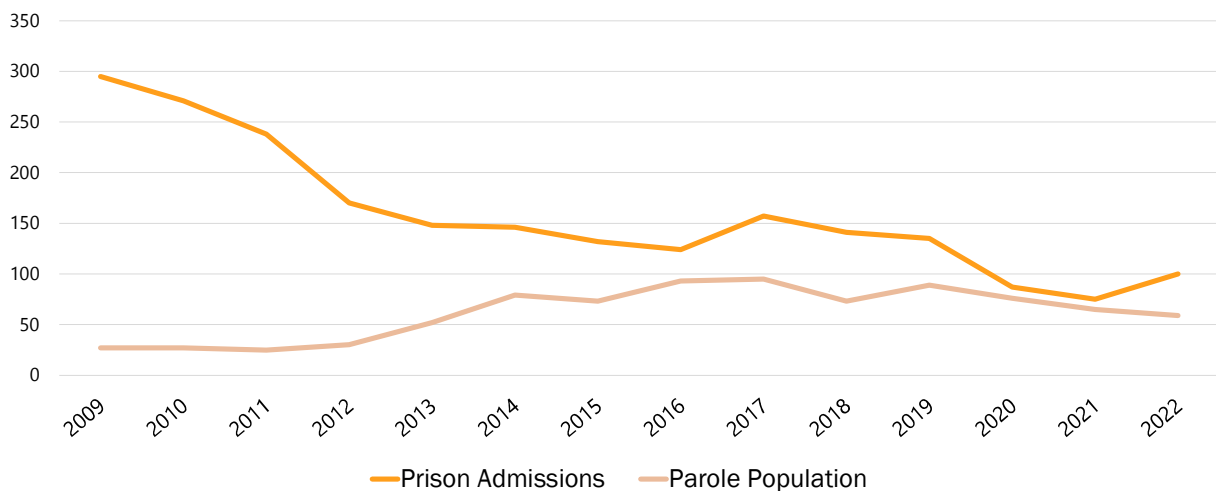


Source: NC State Bureau of Investigation

337

Prison admissions and parole population

Orange County prison admissions and parole populations, 2009-2022



Source: NC Department of Public Safety

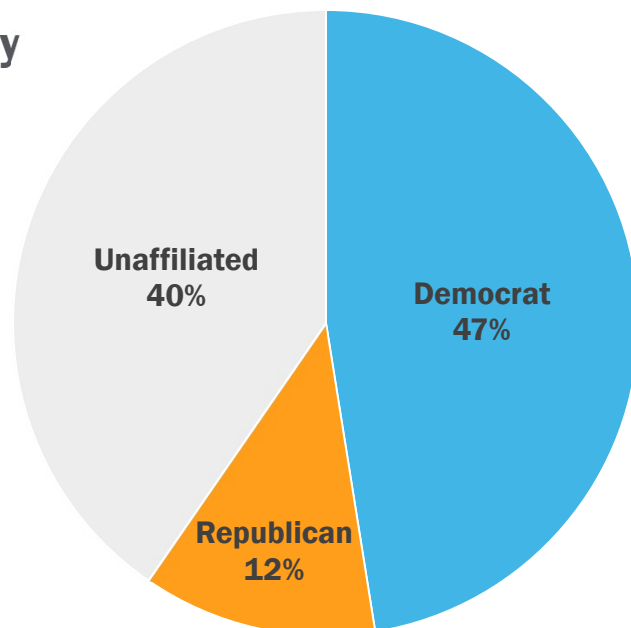
338

Voter Registration

339

Majority of Orange County voters are registered Democrat or Unaffiliated

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

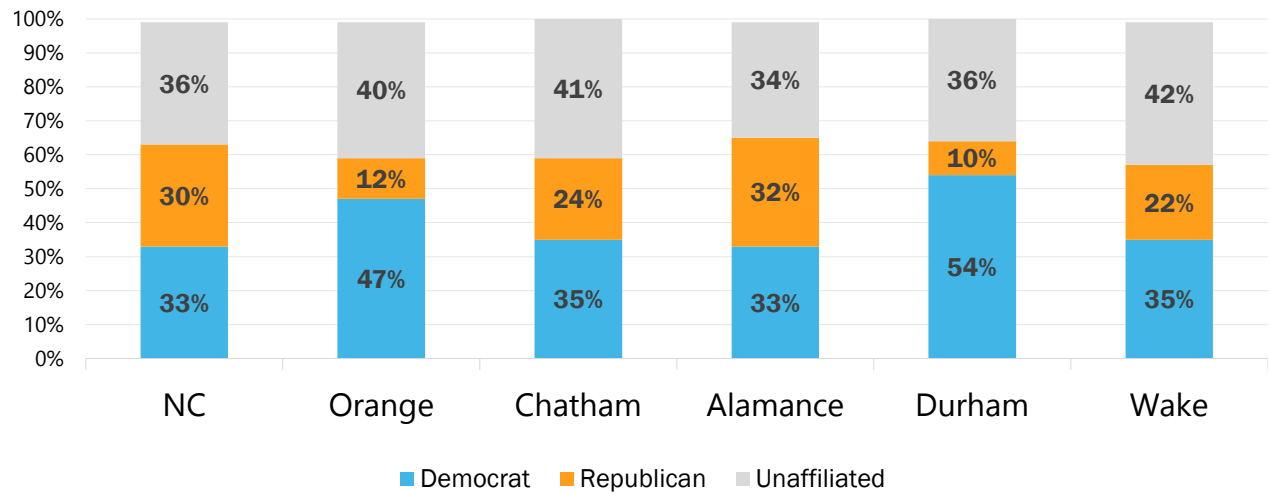


Source: NC State Board of Elections

340

Voter registration by party

Voter registration by party as of July 11, 2023

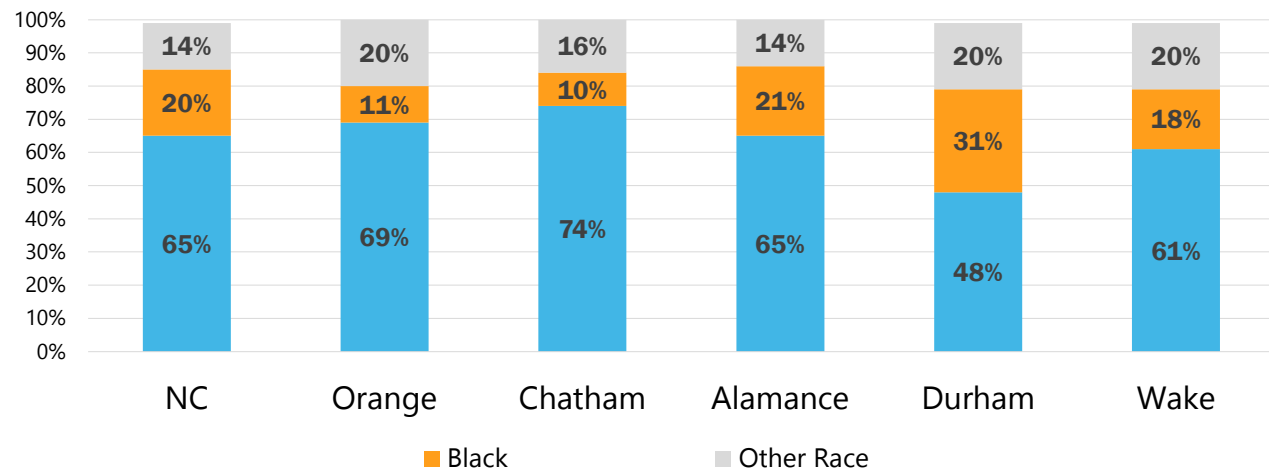


Source: NC State Board of Elections

341

Orange & Chatham Counties have the smallest share of Black voters compared to neighbors and the state

Voter registration by race, 07/2023



Source: NC State Board of Elections

342