



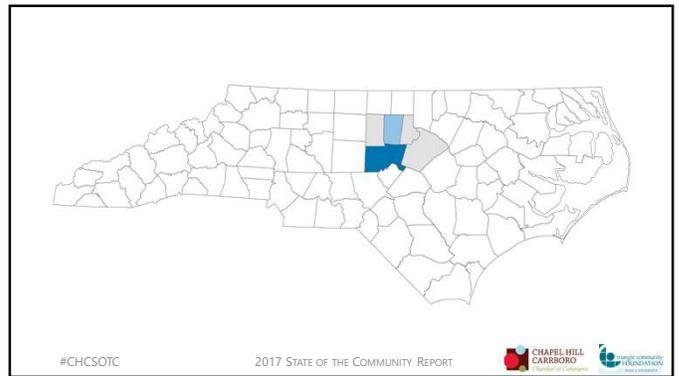
**A special thanks to  
Carolina Demography  
and the  
Carolina Population Center**

**Special Thanks To...**

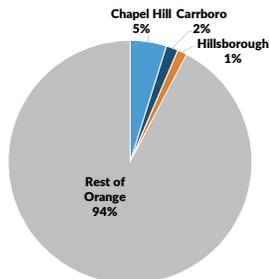
- Town of Chapel Hill
- Carolina Population Center
- Carolina Demography
- Chapel Hill-Orange County Visitors Bureau
- Orange Water & Sewer Authority (OWASA)
- Mark Zimmerman, Re/Max Winning Edge
- University of North Carolina at Chapel Hill
- Durham Tech
- GoTriangle
- Chapel Hill Transit

**Preview**

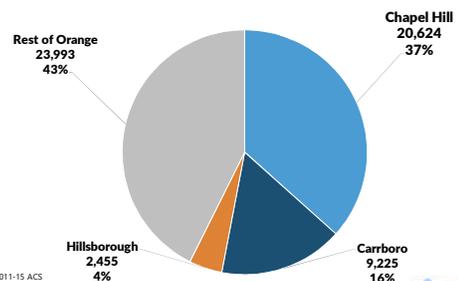
- Changing Demography
- Commuting
- Housing
- Wages
- Health
- Poverty
- Education



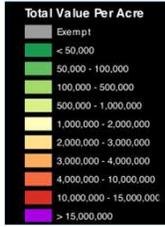
**Orange County Land Distribution**



**Location of Orange County Housing Units**



## Orange County Total Value Per Acre



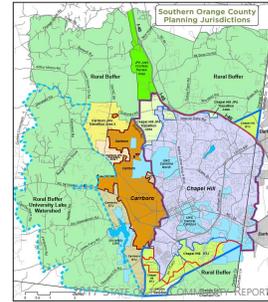
Source: Urban3  
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## Southern Orange County Planning Jurisdictions

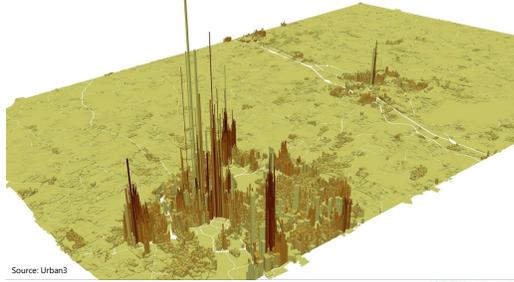
Town of Chapel Hill



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## Assessed Value Per Acre



Source: Urban3

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## Demographics:

Who We Are

## Population Growth 2016

Jurisdiction	2010	2016	Pop Growth	Growth Rate
Orange County	133,801	141,796	+7,995	6.0% (0.9% PY)
Hillsborough	6,087	6,568	+481	7.9% (1.2% PY)
Carrboro	19,582	21,265	+1,683	8.6% (1.3% PY)
Chapel Hill	57,233	59,246	+2,013	3.5% (0.6% PY)
North Carolina	9,535,483	10,146,788	+611,305	6.4% (1.0% PY)

Source U.S. Census Bureau

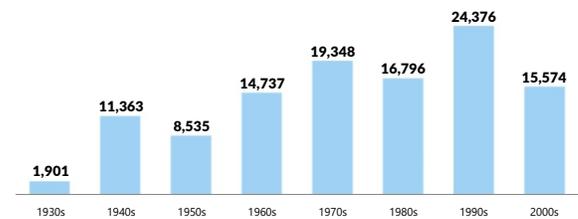
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## Orange County Population Growth Slowest Since 1960s

Numeric Growth By Decade, 1930-2010

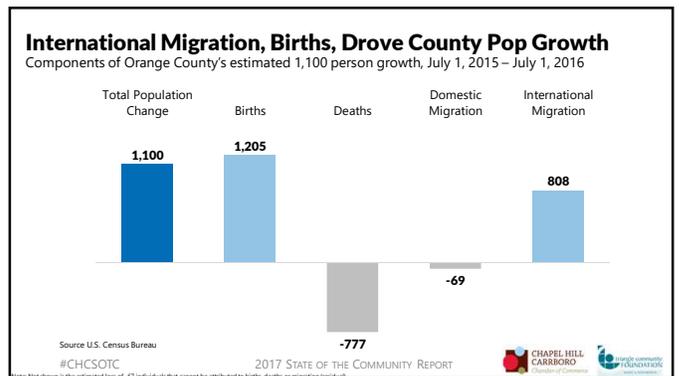
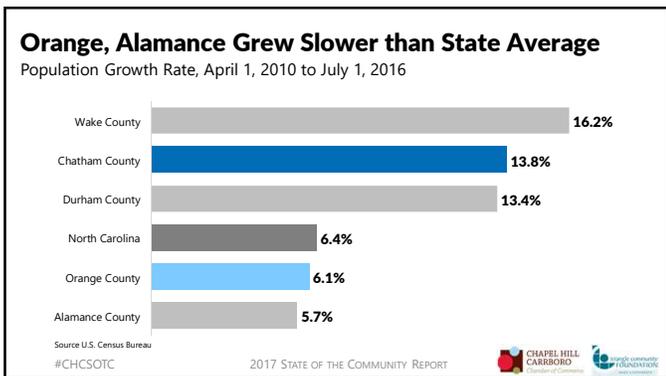
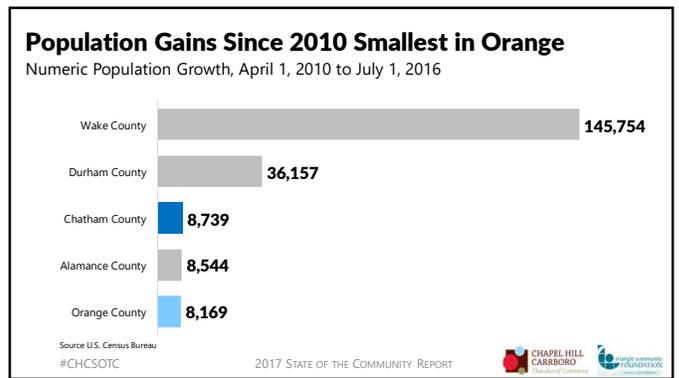
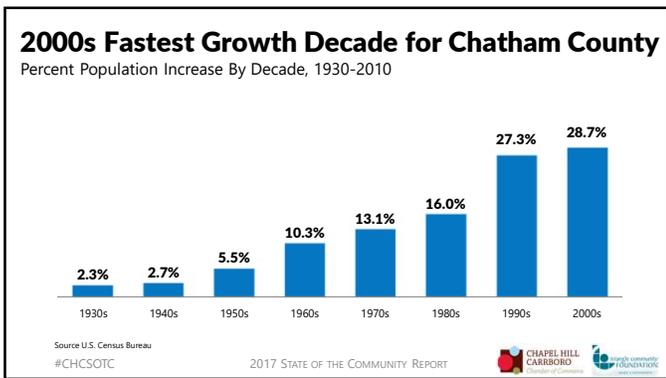
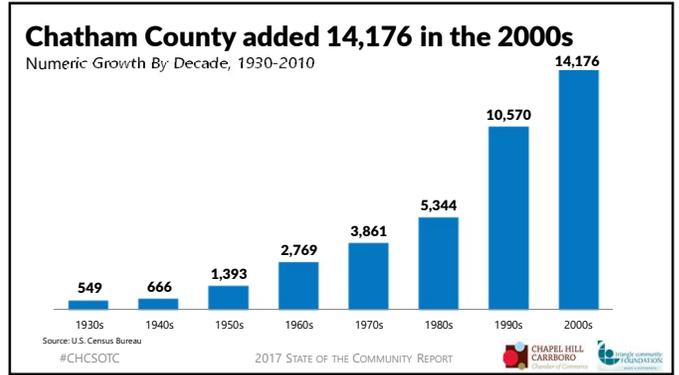
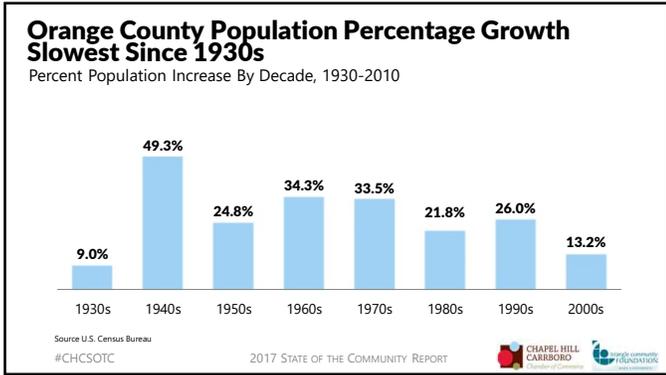


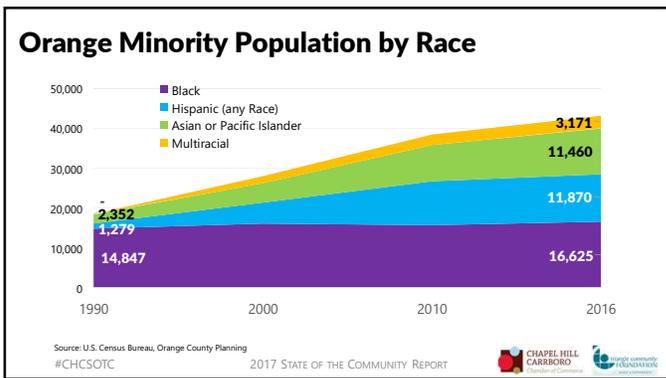
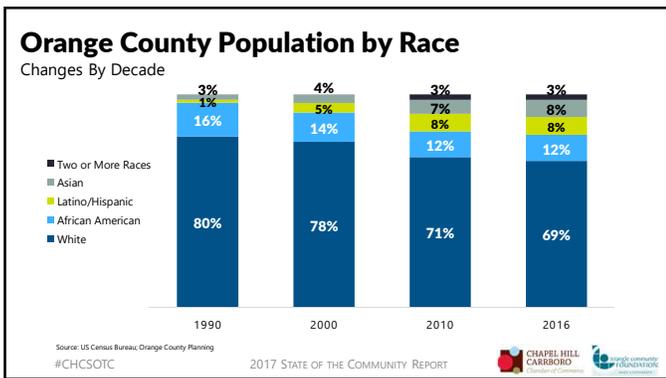
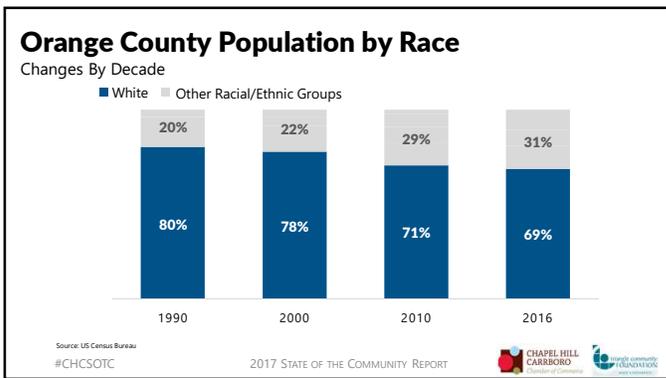
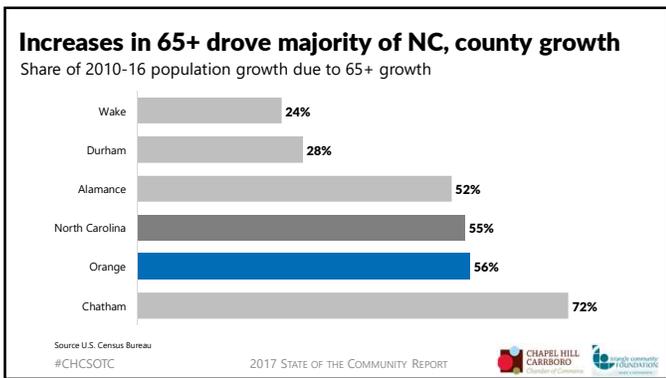
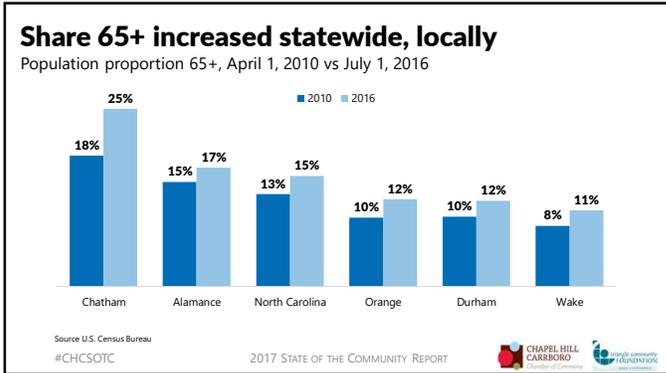
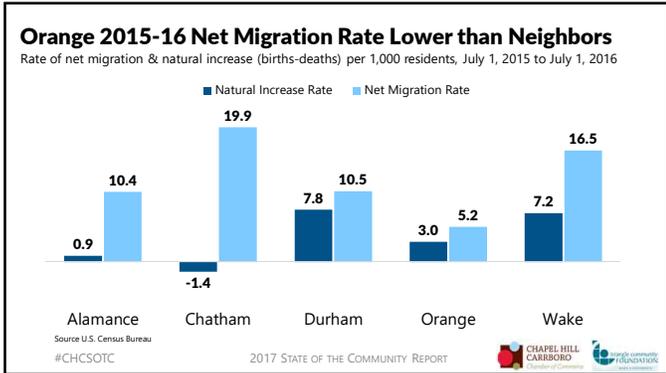
Source U.S. Census Bureau

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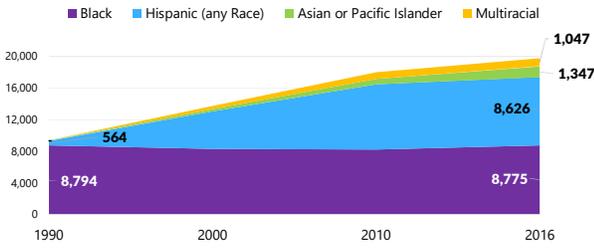
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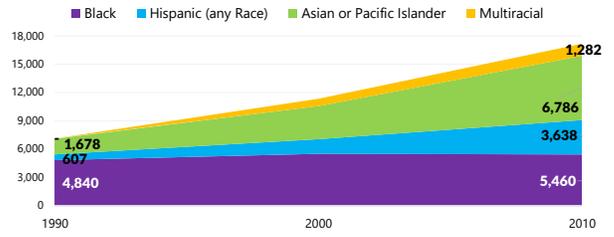


### Chatham Minority Population by Race



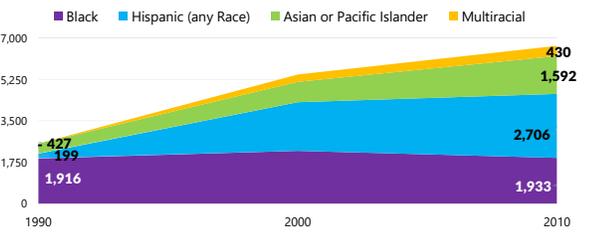
Source: U.S. Census Bureau, Orange County Planning  
 #CHCSOTC 2017 STATE OF THE COMMUNITY REPORT CHAPEL HILL CARRBORO ORANGE COUNTY FOUNDATION

### Chapel Hill Minority Population by Race



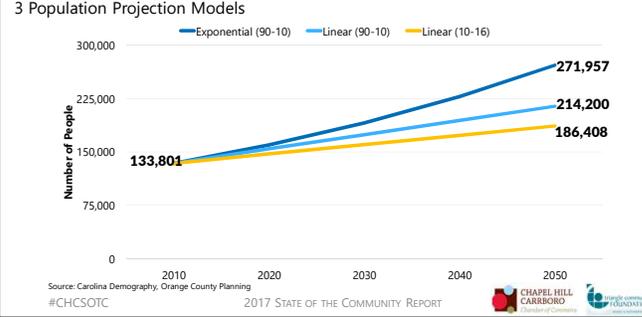
Source: U.S. Census Bureau, Orange County Planning  
 #CHCSOTC 2017 STATE OF THE COMMUNITY REPORT CHAPEL HILL CARRBORO ORANGE COUNTY FOUNDATION

### Carrboro Minority Population by Race



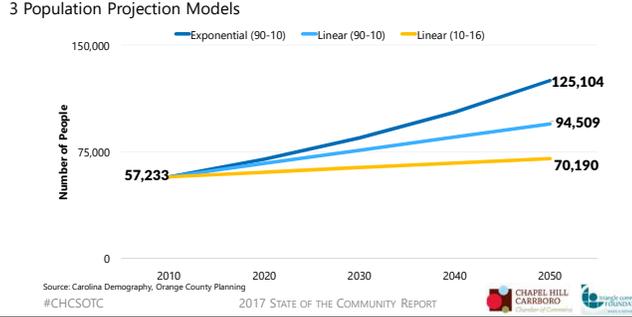
Source: U.S. Census Bureau, Orange County Planning  
 #CHCSOTC 2017 STATE OF THE COMMUNITY REPORT CHAPEL HILL CARRBORO ORANGE COUNTY FOUNDATION

### How many people in 2050? Orange County



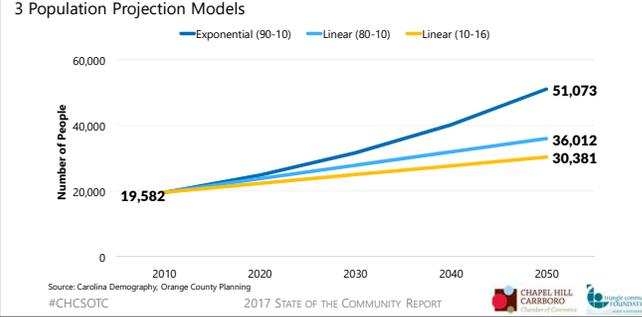
Source: Carolina Demography, Orange County Planning  
 #CHCSOTC 2017 STATE OF THE COMMUNITY REPORT CHAPEL HILL CARRBORO ORANGE COUNTY FOUNDATION

### How many people in 2050? Chapel Hill

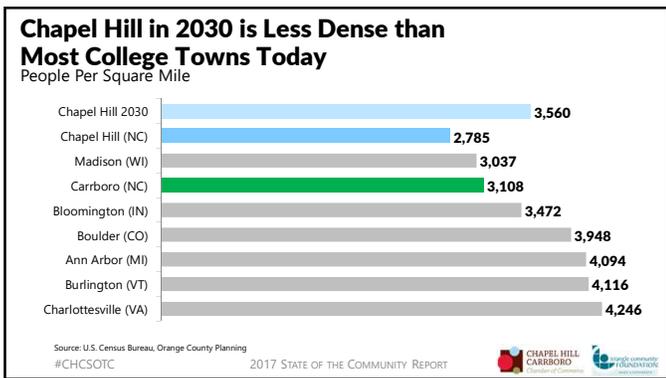
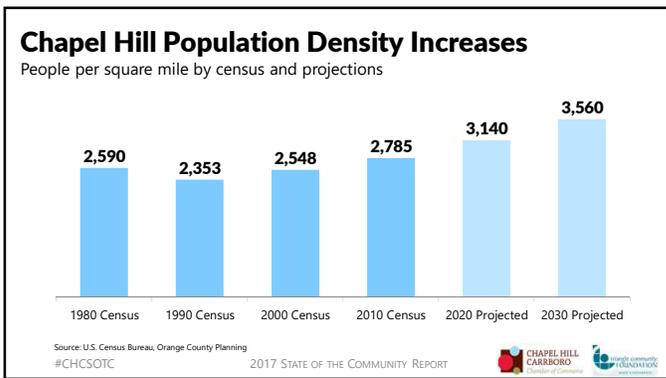
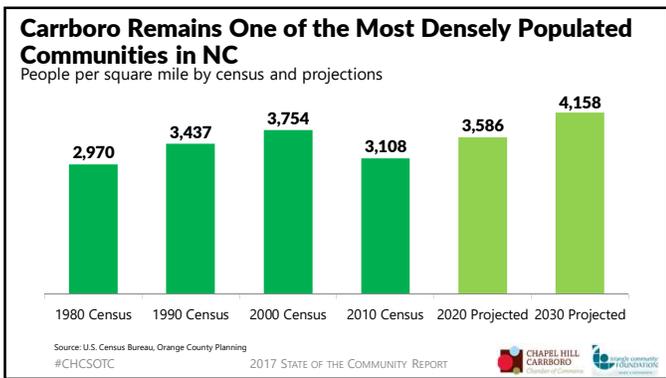
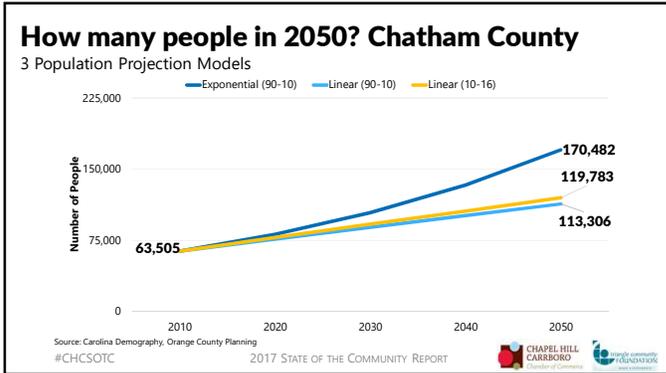
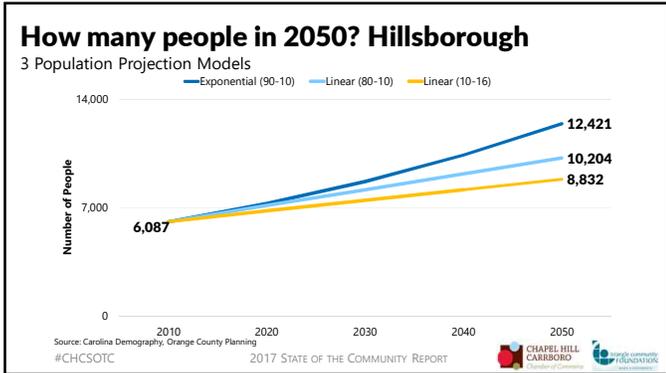


Source: Carolina Demography, Orange County Planning  
 #CHCSOTC 2017 STATE OF THE COMMUNITY REPORT CHAPEL HILL CARRBORO ORANGE COUNTY FOUNDATION

### How many people in 2050? Carrboro



Source: Carolina Demography, Orange County Planning  
 #CHCSOTC 2017 STATE OF THE COMMUNITY REPORT CHAPEL HILL CARRBORO ORANGE COUNTY FOUNDATION

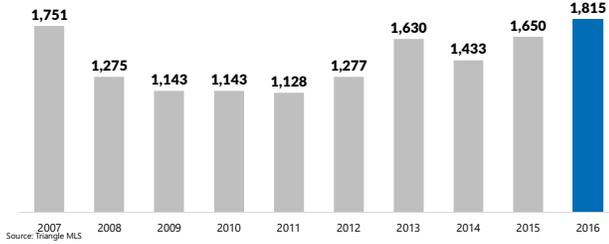


# Housing:

Where We Live

### Homes Sold in 2016 Exceeded Pre-Recession Sales

Number of single and multifamily home sales in Orange County, 2007-16



Source: Triangle MLS

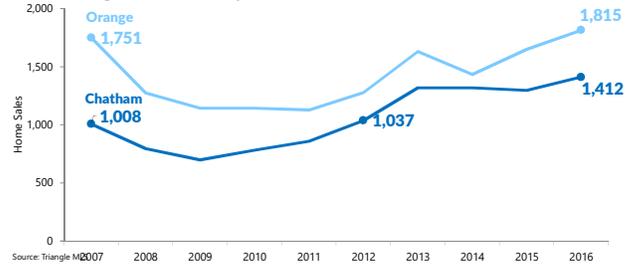
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### Chatham Home Sales Rebounded in 2012

Number of single and multifamily home sales, 2007-2016



Source: Triangle MLS

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### New construction activity concentrated in Wake

Number of single and multi-family homes built and sold, 2010-2016



Source: Triangle MLS

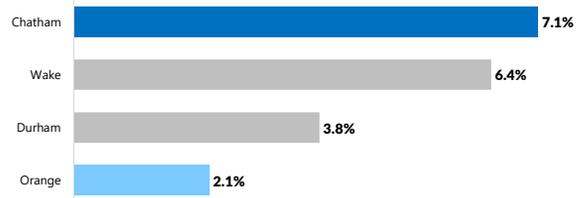
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### Chatham had largest growth of housing stock since 2010

New construction (2010-2016) as share of 2010 housing stock



Source: Triangle MLS

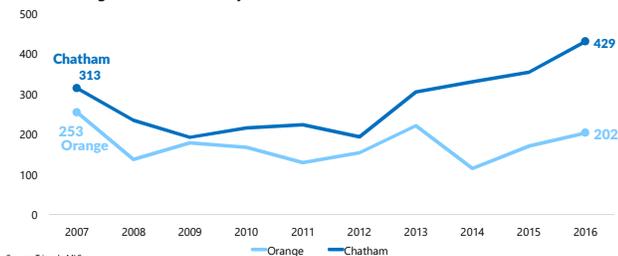
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### Chatham New Construction Sales Outpace Orange

Number of single and multi-family homes built and sold, 2007-2016



Source: Triangle MLS

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# 1984

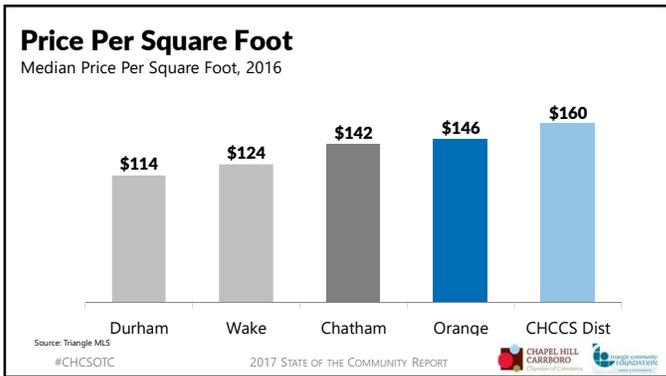
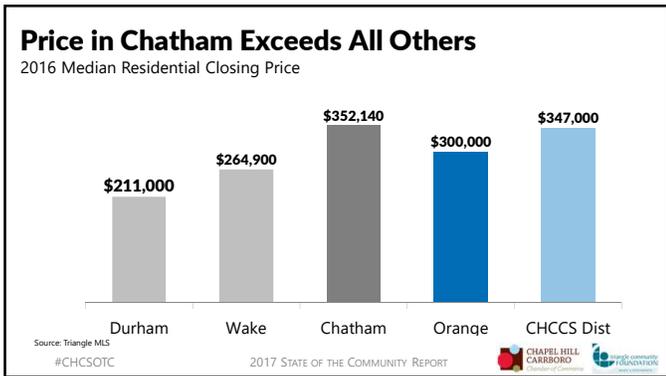
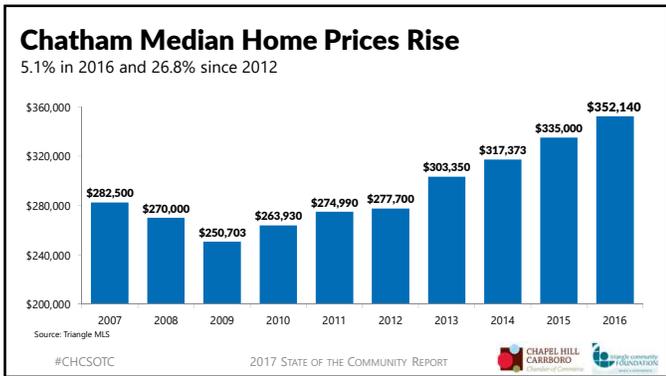
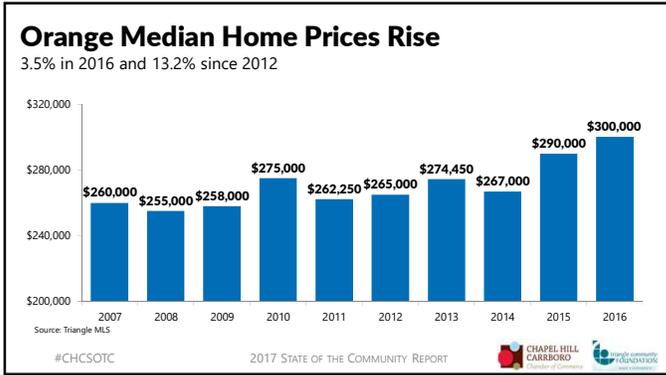
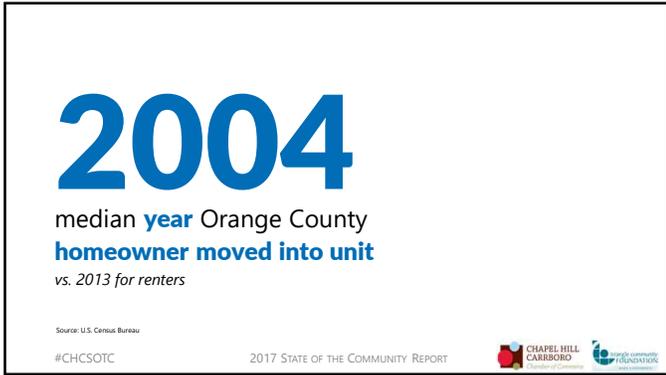
median year house built in Orange County

Source: U.S. Census Bureau

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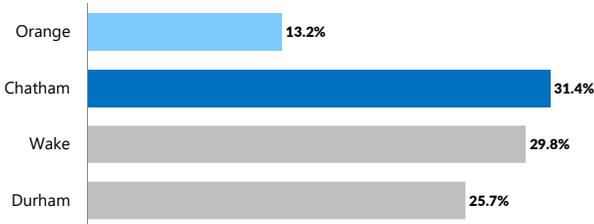
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## Home prices have risen across the region

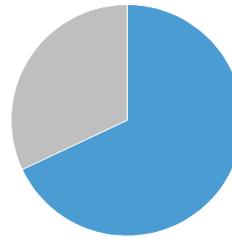
Change in median residential sales price, 2012 vs 2016



Source: Triangle MLS

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**68%**

of Orange 2016 home sales were in **CHCCS District**

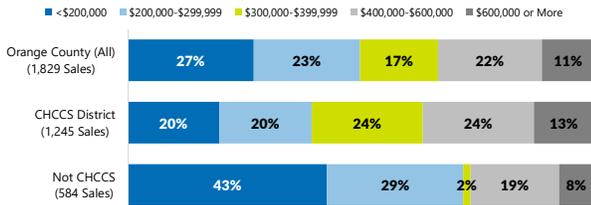
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## 40% of Homes in CHCCS District and 50% of All Orange County Homes Sold for <\$300K

2016 Orange County home sales by price



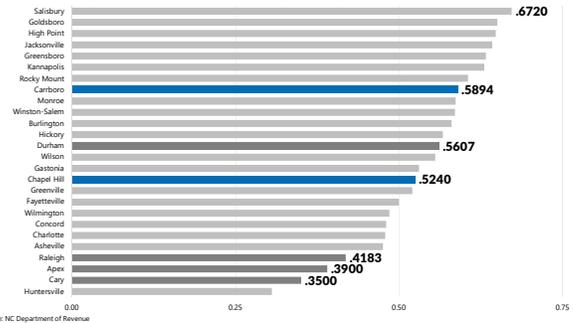
Source: Triangle MLS

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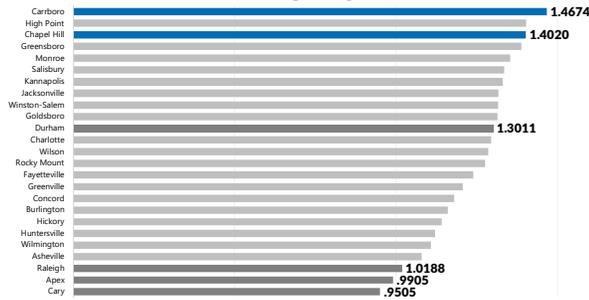


## 2016 City and Town Property Tax Rates



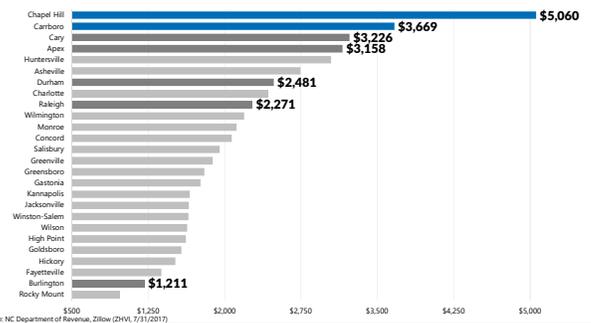
Source: NC Department of Revenue

## 2016 All Jurisdictions Property Tax Rates



Source: NC Department of Revenue

## 2016 Tax Rates Assessed on Median Home Value



Source: NC Department of Revenue, Zillow (ZHVI, 7/31/2017)

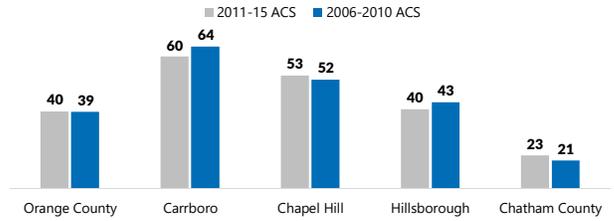
However ...

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### Most people are renting



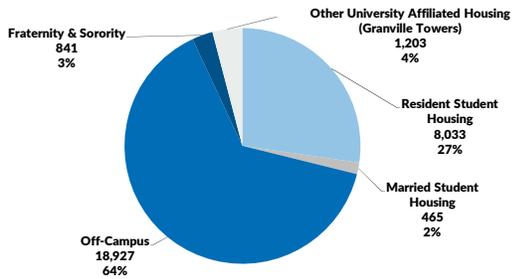
Source: U.S. Census Bureau

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### 2016 UNC Student Enrollment by Housing Type



Source: UNC Fact Book, OIRA

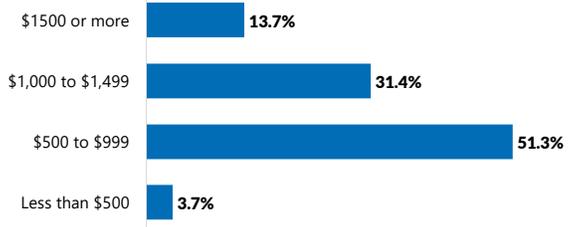
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### What people are paying for rent

Orange County Gross Rent Paid in 2015



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45%

of county renters spent **\$1,000 or more** on rent in 2015

Source: U.S. Census Bureau

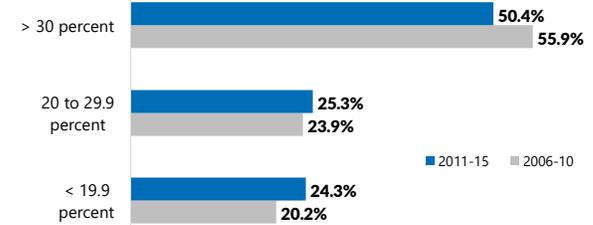
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### Households Paying More Than 30% of Gross Income on Rent Declines

Gross Rent as a Percentage of Household Income



Source: U.S. Census Bureau

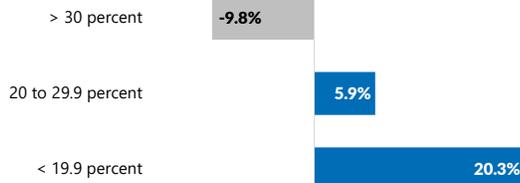
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### Households Paying More Than 30% of Gross Income on Rent Declines

Percent Change 2006-2010 to 2011-2015



Source: U.S. Census Bureau

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### 2017 Fair Market Rent

	North Carolina	Durham-Chapel Hill HMFA	Alamance County	Raleigh MSA
Zero Bedroom	\$629	<b>\$710</b>	\$652	\$695
One Bedroom	\$683	<b>\$834</b>	\$668	\$861
Two Bedroom	\$821	<b>\$978</b>	\$838	\$993
Three Bedroom	\$1,108	<b>\$1,332</b>	\$1,143	\$1,294
Four Bedroom	\$1,336	<b>\$1,481</b>	\$1,238	\$1,592

Source: National Low Income Housing Coalition

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### Local Housing Wage is \$16.04 for a 1 Bedroom Apt

Housing Wage = Hourly Wages Needed to Afford Fair Market Rate Rent, 2017

	North Carolina	Durham-Chapel Hill HMFA	Alamance County	Raleigh MSA
Zero Bedroom	\$12.09	<b>\$13.65</b>	\$12.54	\$13.37
One Bedroom	\$13.13	<b>\$16.04</b>	\$12.85	\$16.56
Two Bedroom	\$15.79	<b>\$18.81</b>	\$16.12	\$19.10
Three Bedroom	\$21.30	<b>\$25.62</b>	\$21.98	\$24.88
Four Bedroom	\$25.69	<b>\$28.48</b>	\$23.81	\$30.62

Source: National Low Income Housing Coalition

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### \$39,120 Needed for 2 Bedroom Fair Market Rent

Annual Salary Needed to Afford Fair Market Rate Rent, 2017

	North Carolina	Durham-Chapel Hill HMFA	Alamance County	Raleigh MSA
Zero Bedroom	\$25,147	<b>\$28,400</b>	\$26,080	\$27,800
One Bedroom	\$27,319	<b>\$33,360</b>	\$26,720	\$34,440
Two Bedroom	\$32,843	<b>\$39,120</b>	\$33,520	\$39,720
Three Bedroom	\$44,305	<b>\$53,280</b>	\$45,720	\$51,760
Four Bedroom	\$53,437	<b>\$59,240</b>	\$49,520	\$63,680

Source: National Low Income Housing Coalition

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### 104 Hours of Work Needed for Minimum Wage Worker to Afford Local 2 Bedroom Rental

Weekly Hours of Minimum Wage Work Needed to Afford Fair Market Rate Rent, 2017

	North Carolina	Durham-Chapel Hill HMFA	Alamance County	Raleigh MSA
Zero Bedroom	67	<b>75</b>	69	74
One Bedroom	72	<b>88</b>	71	91
Two Bedroom	87	<b>104</b>	89	105
Three Bedroom	118	<b>141</b>	121	137
Four Bedroom	142	<b>157</b>	131	169

Source: National Low Income Housing Coalition

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**ELI = Extremely Low Income**

**30% or Less of Area Median Income**

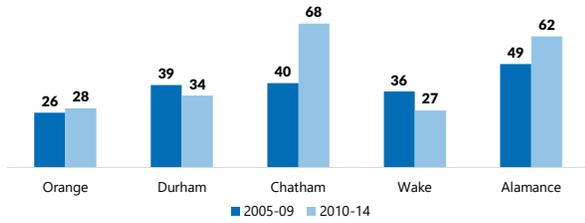
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### Affordable Units Per 100 ELI Household

Extremely Low Income (ELI) Households earn 0-30% Area Median Income



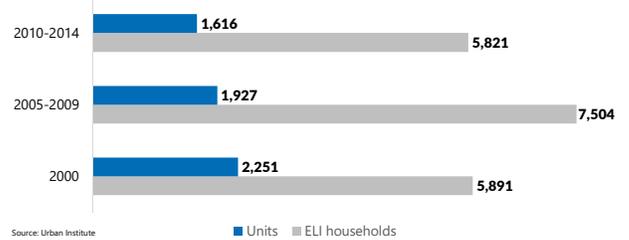
Source: Urban Institute  
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### Orange County Gap between ELI Households and Available Units Decreased by More than 1,000 Units

Gap between ELI households (<30% area median income) and available units



Source: Urban Institute

■ Units ■ ELI households

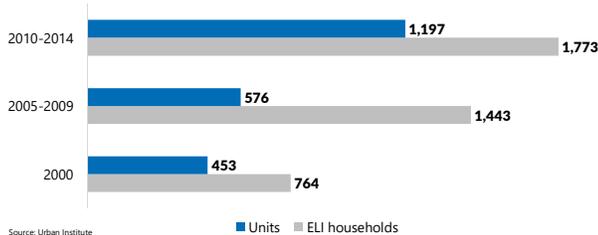
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### Chatham County Gap between ELI Households and Available Units Decreases by Nearly 50%

Gap between ELI households (<30% area median income) and available units



Source: Urban Institute

■ Units ■ ELI households

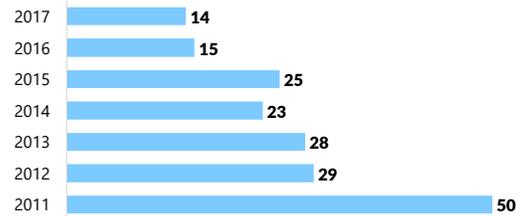
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### Orange Chronically Homeless at Lowest Recorded Level

Number of Chronically Homeless Individuals (annual point-in-time count), 2011-2017



Source: Orange County Partnership to End Homelessness

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### 18 Homeless Children in Families in Orange

Number of Homeless Children in Families (annual point-in-time count), 2011-2017



Source: Orange County Partnership to End Homelessness

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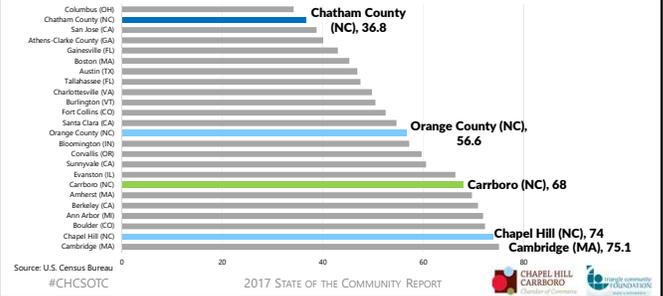


## Income & Education

- Well Educated
- High Earning
- Generous
- Not That Generous

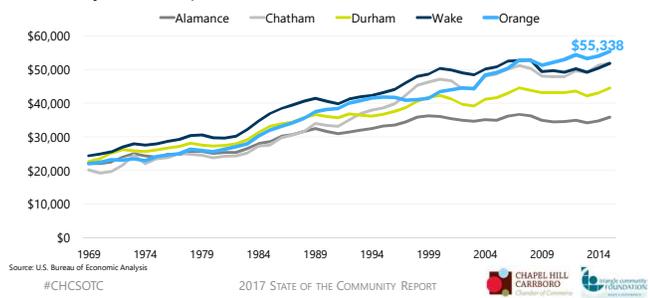
### Chapel Hill Second Highest % with BA+

Percent of Residents 25+ with Bachelors degree or higher (2011-15)

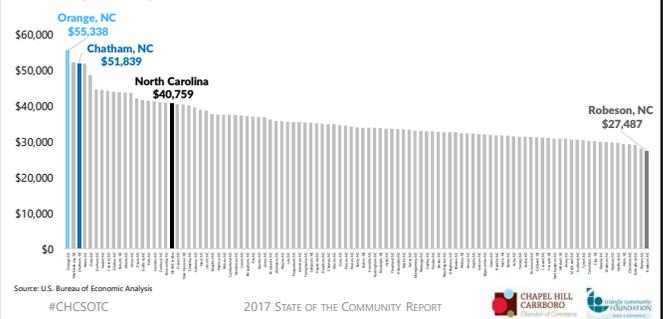


### Orange Per Capita Income Growth Outpaces All Others

Inflation Adjusted Per Capita Income, 1969-2015

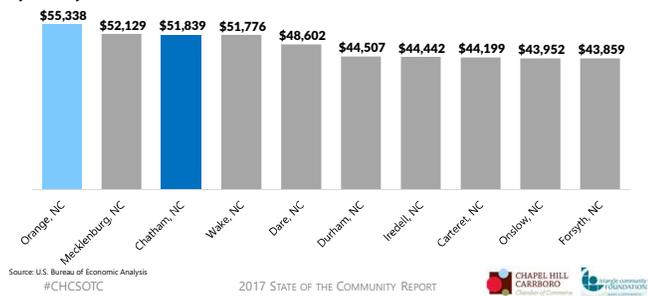


### Orange Highest Per Capita Income in State

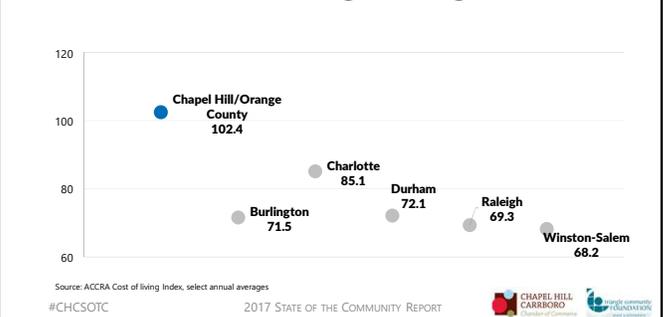


### Per Capita Personal Income

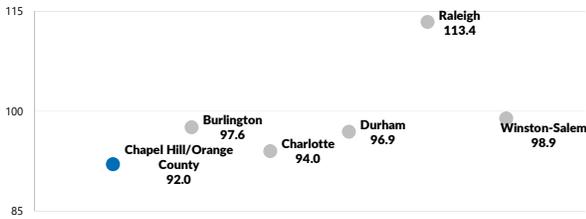
By County, 2015



### 2016 ACCRA Cost of Living Housing Index



### 2016 ACCRA Cost of Living Grocery Index



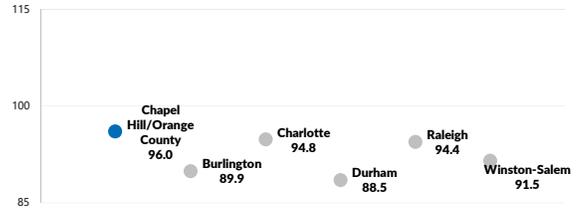
Source: ACCRA Cost of living Index, select annual averages

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### 2016 ACCRA Cost of Living Composite Index



Source: ACCRA Cost of living Index, select annual averages

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### Orange has #1 Adjusted Gross Income, Chatham #18

County	Average AGI on Itemized Returns	Rank (of 100 Counties)
Orange County	\$175,600	1
Mecklenburg County	\$134,897	2
Wake County	\$128,756	3
Guilford County	\$110,738	11
Durham County	\$106,478	15
Chatham County	\$101,900	18
Alamance County	\$92,312	36

Source: National Center for Charitable Statistics

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### Orange #4 in Value of Itemized Deductions, Chatham #85

County	Average Itemized Contributions Reported	Rank (of 100 Counties)
Orange County	\$5,665	4
Mecklenburg County	\$5,230	19
Guilford County	\$5,080	32
Durham County	\$4,678	55
Wake County	\$4,519	62
Alamance County	\$4,425	68
Chatham County	\$4,166	85

Source: National Center for Charitable Statistics

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### Orange Ranks 98<sup>th</sup> in Percent of Income Donated, Chatham 90<sup>th</sup>

County	Percent of AGI Contributed	Rank (of 100 Counties)
Alamance County	4.8%	72
Guilford County	4.6%	79
Durham County	4.4%	82
<b>Chatham County</b>	<b>4.1%</b>	<b>90</b>
Mecklenburg County	3.9%	91
Wake County	3.5%	96
<b>Orange County</b>	<b>3.2%</b>	<b>98</b>

Source: National Center for Charitable Statistics

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### Yancey and Macon Counties Lead NC in Contributions

County	Average Itemized Contribution	Rank (of 100 Counties) Percent of AGI Contributed
Yancey	\$7,919 (9.2%)	1
Macon County	\$8,007 (8.5%)	2
Washington County	\$5,579 (7.3%)	3
Anson County	\$5,086 (7.2%)	4
Warren County	\$4,169 (7.1%)	5

Source: National Center for Charitable Statistics

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**And where does that income  
come from...**

**...work**

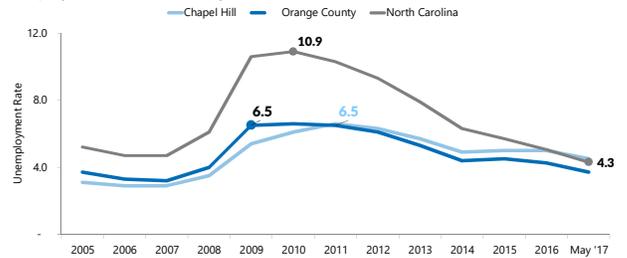
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## Unemployment Declines in North Carolina

Unemployment Rate, 2005-May 2017



Source: NC Department of Commerce

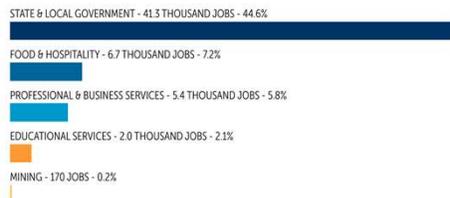
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## Orange County Employment Patterns

### TOP FIVE SPECIALIZED INDUSTRIES, BY EMPLOYMENT, 2016



Source: National Association of Counties

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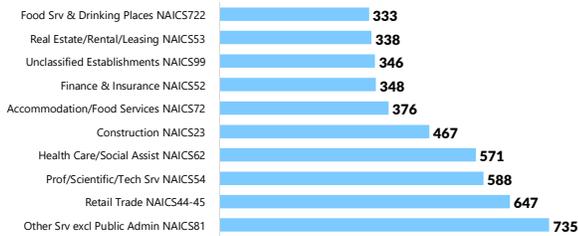
## Orange County Major Employers 2017 Q1

1. UNC Chapel Hill
2. UNC Health Care System
3. Chapel Hill-Carrboro City Schools
4. Orange County Schools
5. Local government
6. UNC Physicians Network
7. Town of Chapel Hill
8. Eurosport
9. General Electric
10. Wal-Mart
11. Aramark Food and Support Services
12. Harris Teeter
13. Food Lion
14. AKG of America
15. The Chapel Hill Residential
16. PHE Inc
17. Weaver St Market
18. Strata Solar
19. Performance Chevrolet
20. Residential Services
21. Wellspring Grocery
22. Carolina Inn
23. Summit Consulting-Engineering
24. The Arc of the Triangle
25. US Postal Service

Source: NC Department of Commerce

## Orange County Number of Enterprises by Industry

By North American Industry Classification System (NAICS)



Source: NC Commerce (ESRI Business Numbers) - 2016

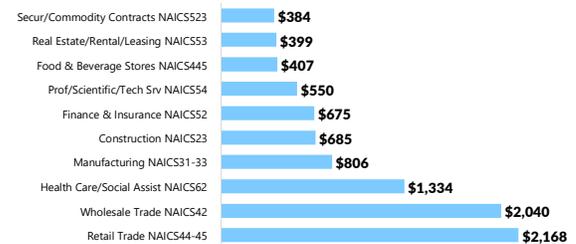
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## Retail, Wholesale & Health Care Lead Sales in Orange

2016 Sales by NAICS Industry Code (Millions)



Source: NC Commerce (ESRI Business Numbers) - 2016

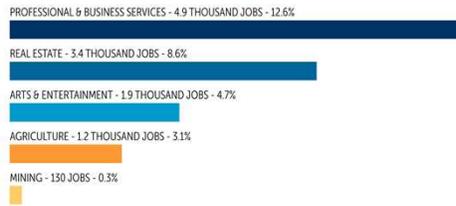
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## Chatham County Employment Patterns

### TOP FIVE SPECIALIZED INDUSTRIES, BY EMPLOYMENT, 2016



Source: National Association of Counties  
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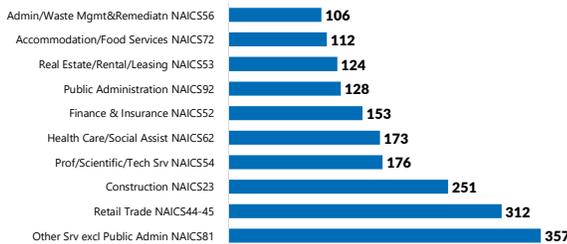
## Chatham County Major Employers 2017 Q1

1. Chatham County Schools
2. County Of Chatham
3. Carolina Meadows
4. Galloway Ridge
5. Mountaire Farms of NC
6. Wal-Mart
7. Arauco Panels
8. Chatham Hospital
9. Fitch Creations
10. Boise Cascade Company
11. Palletone of North Carolina
12. The Laurels of Chatham
13. Lowes Home Centers
14. Sunrise Home Care
15. Piedmont Health Services
16. Harris Teeter
17. Acme McCrary
18. Food Lion
19. Brookwood Farms
20. Genesis Administrative Services
21. Central Carolina Community College
22. Town & Country Hardware Stores
23. Governors Club
24. Triangle Electrical Services
25. NC Department of Public Safety

Source: NC Department of Commerce

## Chatham County Number of Enterprises by Industry

By North American Industry Classification System (NAICS)



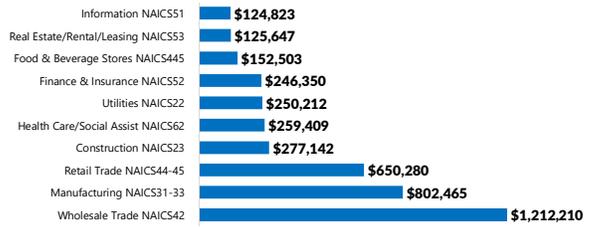
Source: NC Commerce (ESRI Business Numbers) - 2016  
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## Wholesale & Manufacturing Lead Chatham County Sales

Sales By NAICS Industry Code (Thousands)

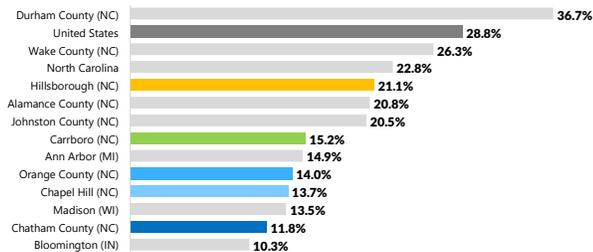


Source: NC Commerce (ESRI Business Numbers) - 2016  
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## Orange County & Municipality Minority Business Ownership Rates Fall Below U.S. And Statewide Averages

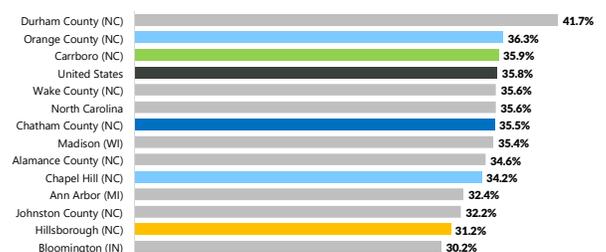


Source: U.S Census Bureau  
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## Female Business Ownership Rate in Orange County Exceeds State and US Average



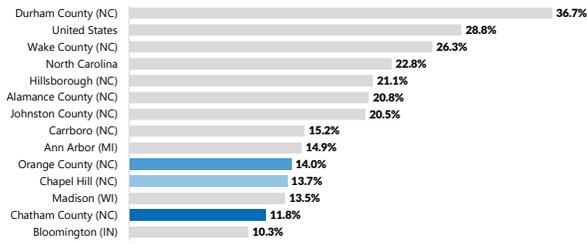
Source: U.S Census Bureau  
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## Minority Business Ownership Rates

Orange County & Municipalities Fall Below U.S. and Statewide Averages



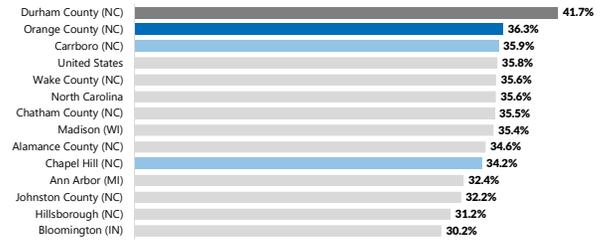
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## Female Business Ownership Rates

Higher share of women-owned firms in unincorporated Orange County



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## Non-Profit

Employment and Charitable Giving

## Orange County Nonprofits

Orange County Registered Nonprofits	975
Orange County 501(c)3 Orgs Filing 990s	437
Annual Revenue of Orange County 501(c)3s	\$870 million
Assets of Orange county 501(c)3s	\$3.3 billion

Source Center for Nonprofits

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## Chatham County Nonprofits

Chatham County Registered Nonprofits	254
Chatham County 501(c)3 Orgs Filing 990s	98
Annual Revenue of Chatham County 501(c)3s	\$105 million
Assets of Chatham county 501(c)3s	\$245 million

Source Center for Nonprofits

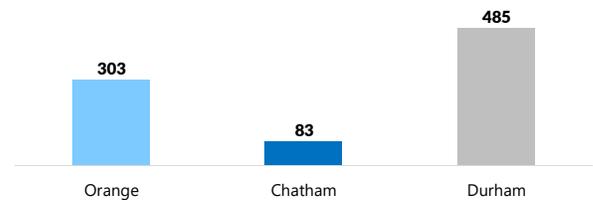
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## Orange, Chatham and Durham Boast 871 Charities

Total Registered 501c3 Non Profits by County (2015)



Source Center for Nonprofits

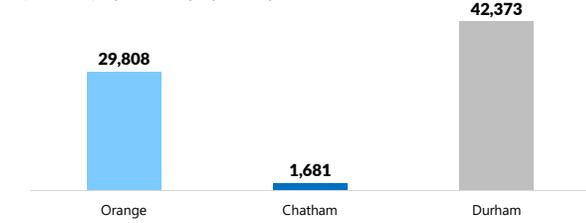
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### Total Non-Profit Employment

Nonprofit Employee County by County (2015)



Source: Center for Nonprofits

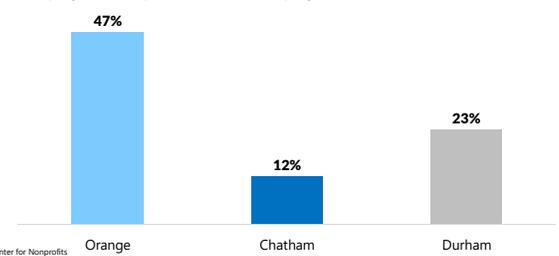
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### 47% of Orange County workers employed in Nonprofit

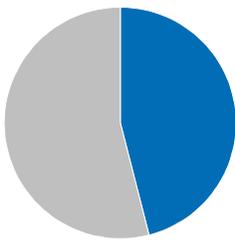
Nonprofit employment as percent of total employment, 2015



Source: Center for Nonprofits

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**46%**

of UNC's employees are from **Orange County**

Source: UNC Office of Institutional Research

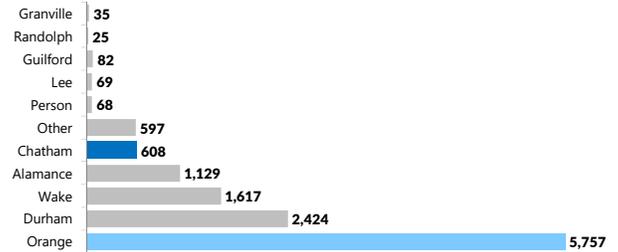
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### Distribution of UNC-CH's 12,411 Employees (2016)

By county of home address



Source: UNC Office of Institutional Research

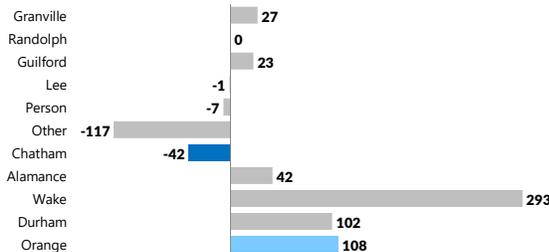
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### Growing number of UNC employees live in Wake

Change in number of UNC employees by county of residence, 2013-2016



Source: UNC Office of Institutional Research

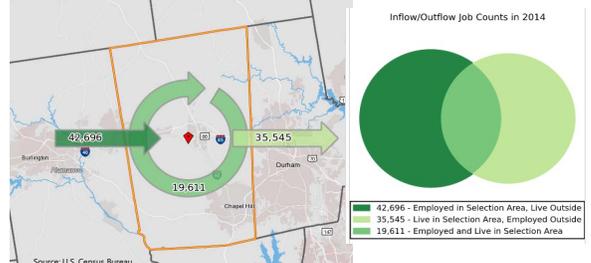
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### Orange Worker Inflows/Outflows, 2014

42,696 drive in, 35,545 drive out and 19,611 live and work in Orange



Source: U.S. Census Bureau

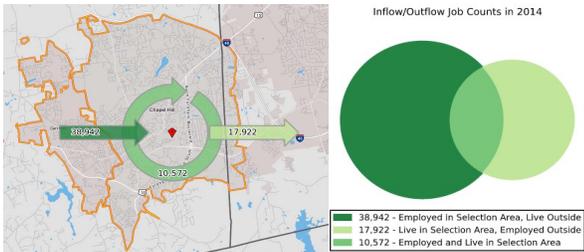
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### Chapel Hill/Carrboro Worker Inflows/Outflows, 2014

38,942 drive in, 17,922 drive out and 10,572 live and work in Orange



Source: U.S. Census Bureau

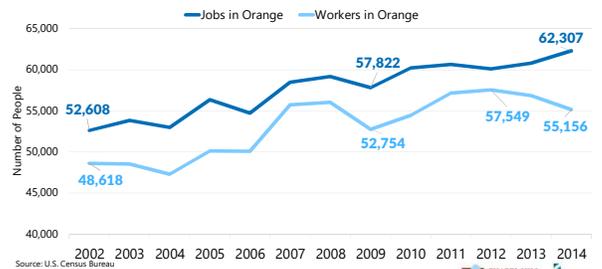
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### More jobs but fewer workers living in Orange

Number of jobs in Orange vs. workers in Orange, 2002-2014



Source: U.S. Census Bureau

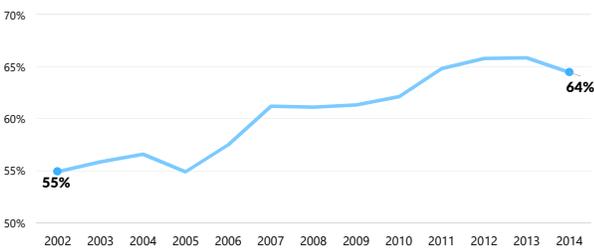
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### Most Orange County residents work elsewhere

Share of Orange County resident workers who work outside of Orange County, 2002-2014



Source: U.S. Census Bureau

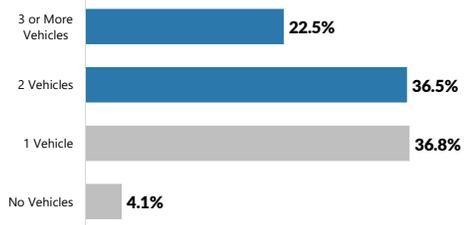
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### 58% of Orange County Households Have 2+ Cars

Share of Households by Number of Vehicles Available, 2011-15



Source: U.S. Census Bureau

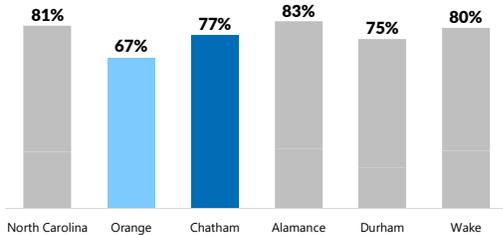
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### Fewer Orange, Chatham Workers Drive Alone to Work

Percent of commuters who drive alone to work, 2011-15



Source: Robert Wood Johnson Foundation

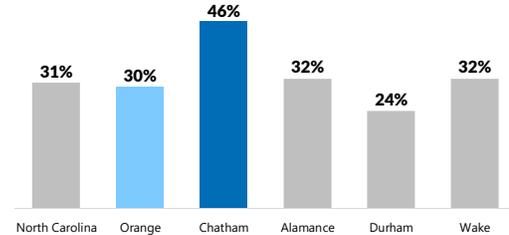
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### 46% of Chatham Workers Driving Alone Travel 30+ Minutes

Percent of those who drive alone to work commuting 30+ minutes, 2011-15



Source: Robert Wood Johnson Foundation

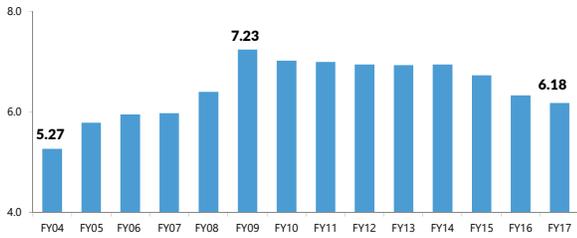
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### Local Transit Ridership Down 1.05M

Total Chapel Hill Transit Ridership (in millions), FY2004-FY2017



Source: Chapel Hill Transit

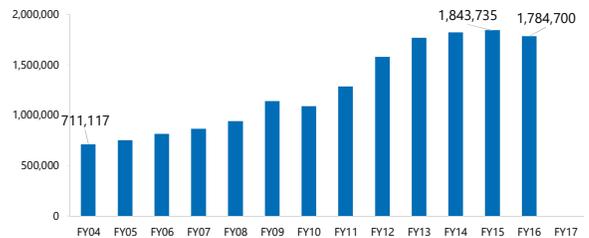
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### GoTriangle Ridership Down 3.2% Off Peak

Total Triangle Transit Ridership, FY2004-FY2016



Source: Triangle Transit

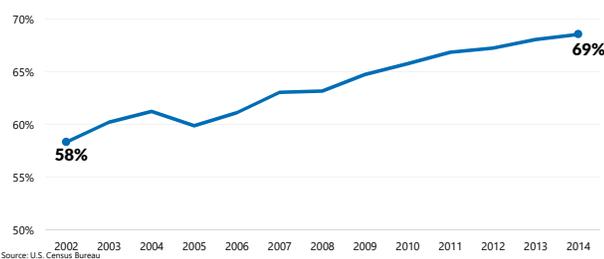
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### More Orange County jobs filled by in-commuters

Share of county jobs filled by individuals who live outside of Orange County, 2002-2014



Source: U.S. Census Bureau

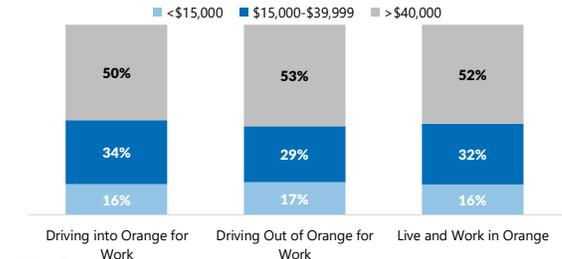
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### Few differences in earnings by place of work/residence

Commuters into/out of Orange County by income, 2014



Source: U.S. Census Bureau

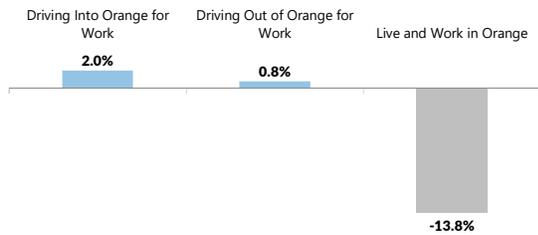
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### Fewer young workers live and work in Orange

Growth in number of young workers (<30) in Orange County by place of work, 2010 vs. 2014



Source: U.S. Census Bureau

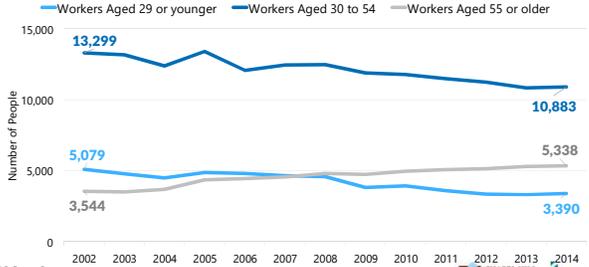
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### Fewer workers under 55 live and work in Orange

Number living and working in Orange County by Age, 2002-2014



Source: U.S. Census Bureau

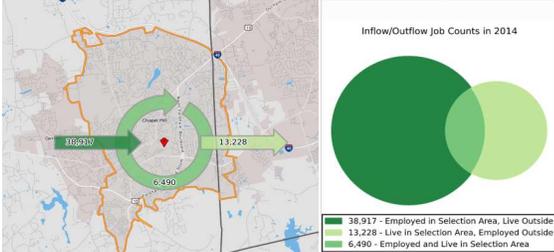
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## Chapel Hill Worker Inflows/Outflows, 2014

38,917 Drive In, 13,228 Drive Out and 6,490 Live and Work in Chapel Hill



Source: U.S. Census Bureau

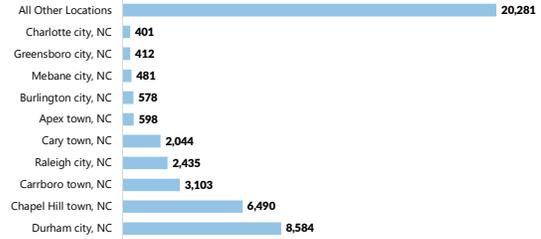
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## Where People Commute From to Fill Chapel Hill Jobs

Place of Residence of Individuals Whose Primary Job was in Chapel Hill in 2014



Source: U.S. Census Bureau

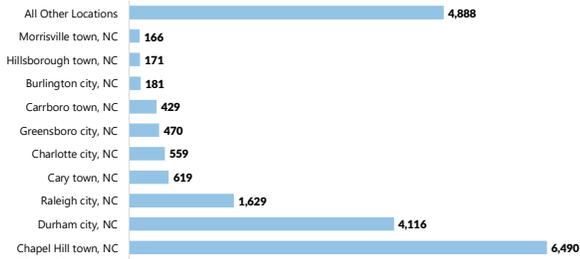
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## Where Do Chapel Hill Residents Work?

Location of Primary Job, 2014



Source: U.S. Census Bureau

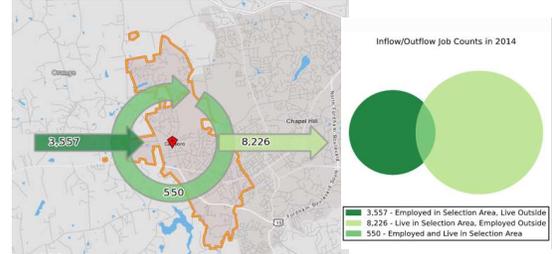
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## Carrboro Worker Inflows/Outflows, 2014

3,557 Drive In, 8,226 Drive Out, and 550 Live and Work in Carrboro



Source: U.S. Census Bureau

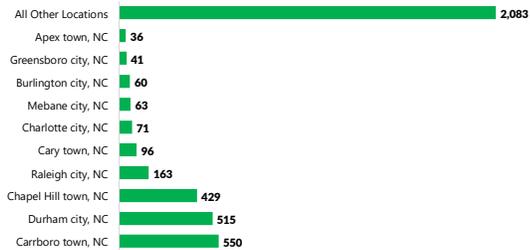
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## Where People Commute From to Fill Carrboro Jobs

Place of Residence of Individuals Whose Primary Job was in Carrboro in 2014



Source: U.S. Census Bureau

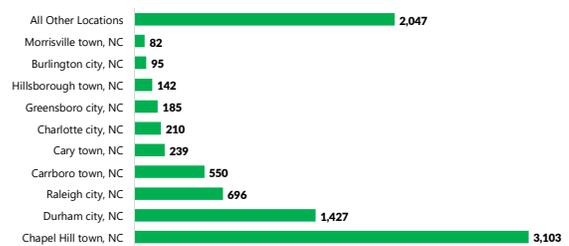
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## Where Do Carrboro Residents Work?

Location of Primary Job, 2014



Source: U.S. Census Bureau

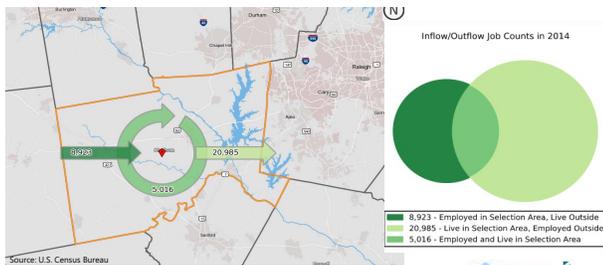
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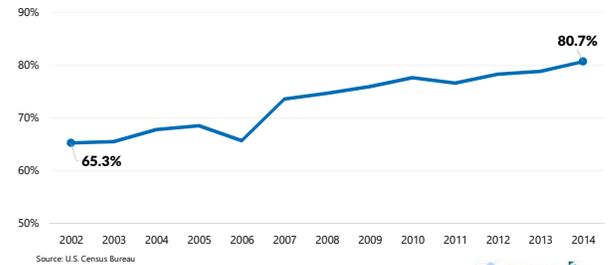
## Chatham Worker Inflows/Outflows, 2014

8,923 drive in, 20,985 drive out and 5,016 Live and Work in Chatham



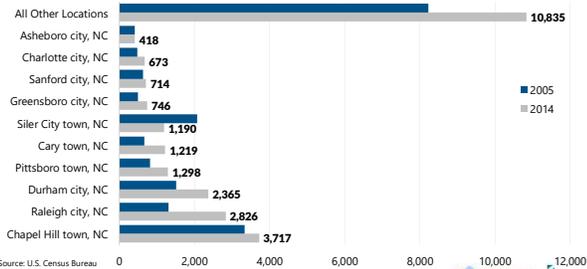
## Majority of Chatham Residents Work Elsewhere

Share of Chatham County resident workers who work outside of Chatham, 2002-2014



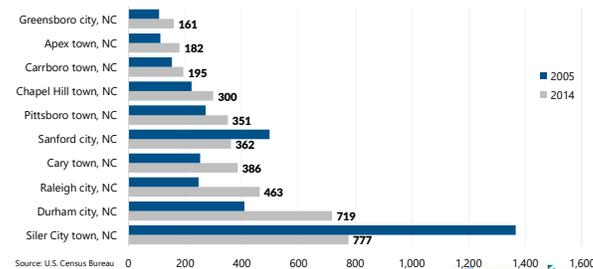
## Where Do Chatham County Workers Work?

2014 vs. 2005



## Where People Drive From to Fill Chatham County Jobs

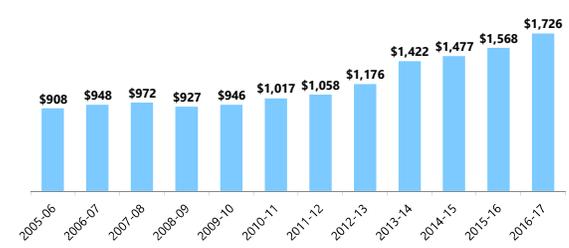
2014 vs. 2005 (Top 10)



## Sales and Economy

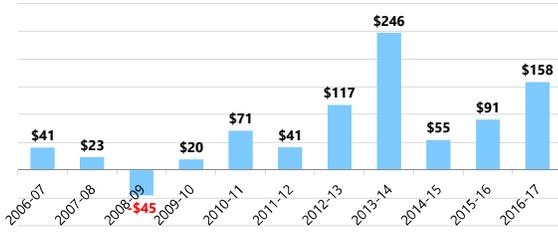
## Taxable Sales Grows to \$1.7 Billion

Orange County Taxable Sales (millions)



### Annual Growth of Orange County Taxable Sales

Change (in millions) in Taxable Sales from Prior Year FY05-FY16



Source: NC Department of Revenue

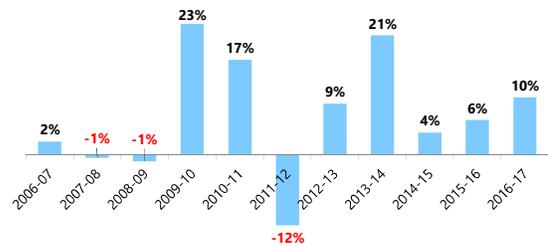
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### Annual Growth of Orange County Taxable Sales

Percent Change in Taxable Sales of Prior Year FY05-FY16



Source: NC Department of Revenue

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### Sales Tax Collections Grow to \$82 Million

Orange County Gross Sales Tax Collections (millions)



Source: NC Department of Revenue

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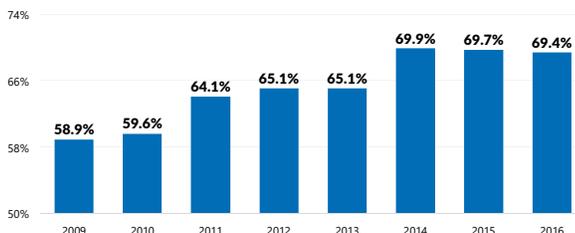
## Orange County Visitor Spending and Economic Impact

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### Orange County Hotel Occupancy Slightly Off Peak

Average Daily Hotel Occupancy, 2009-2016



Source: Chapel Hill/Orange County Visitors Bureau

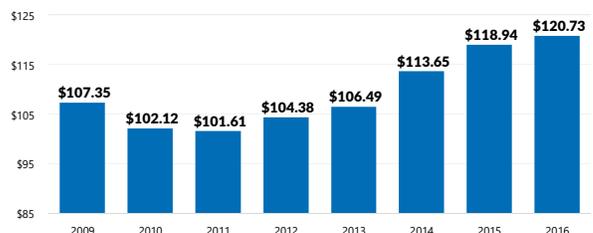
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### Hotel Average Daily Rate Continues to Increase

Orange County Average Daily Rate, 2009-2016



Source: Chapel Hill/Orange County Visitors Bureau

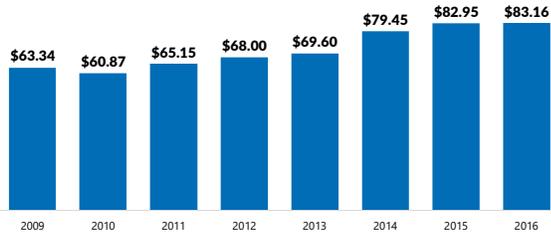
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### Revenue per Room Continues to Grow

Orange County Average Revenue Per Room, 2009-2016



Source: Chapel Hill/Orange County Visitors Bureau

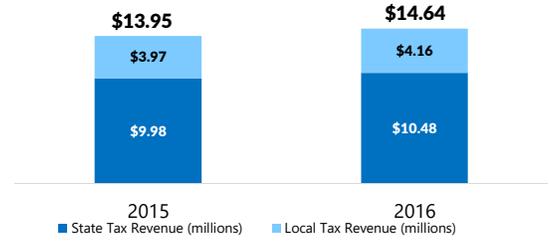
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### Orange Tourism Tax Revenue Tops \$14.6 Million

State and Local Visitor Spending Tax Revenue (millions)



Source: Prepared for VisitNC by the US Travel Association

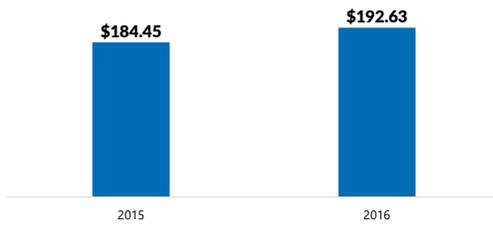
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### Domestic Visitor Spending Increases 4.4%

Orange County Domestic Visitor Spending (millions)



Source: Prepared for VisitNC by the US Travel Association

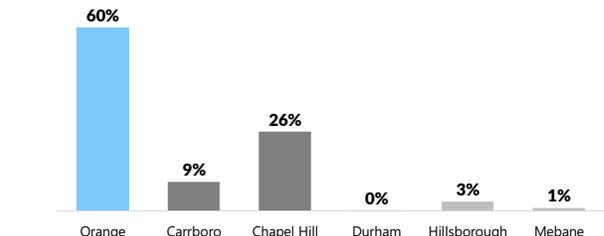
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### Chapel Hill & Carrboro Receive 36% of Orange County Sales Tax Distributions

Municipality share of Orange County Local Option Sales Tax (LOST) Revenue Distributions, FY 2016-17



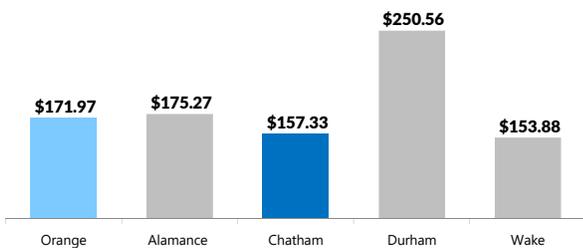
Source: NC Department of Revenue

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### Sales Tax Per Capita FY2016



Source: NC Department of Revenue

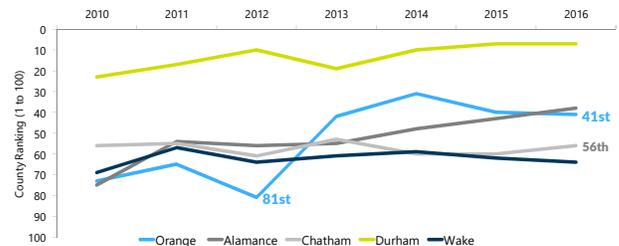
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### Sales Tax Per Capita Rankings

Ranking of 100 NC Counties (1=highest), 2010-2016



Source: NC Department of Revenue

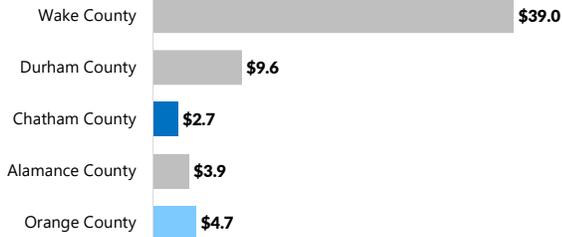
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### Total Household Income (billions)

2016 Total Household Income



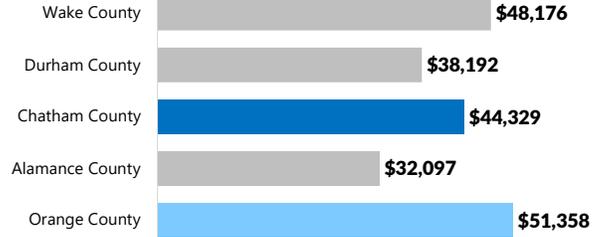
Source: ESR via NC Department of Commerce  
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### Average Household Retail Demand

2016



Source: ESR via NC Department of Commerce  
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### 2016 retail gap

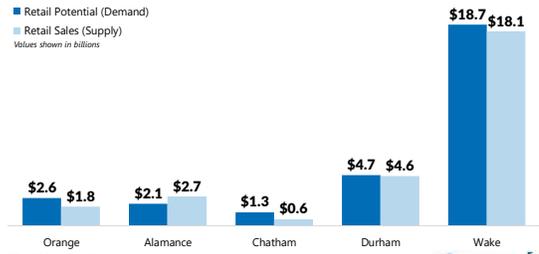
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### Orange Had Largest Retail Gap in 2016

Retail Potential vs. Retail Sales (in billions), 2016



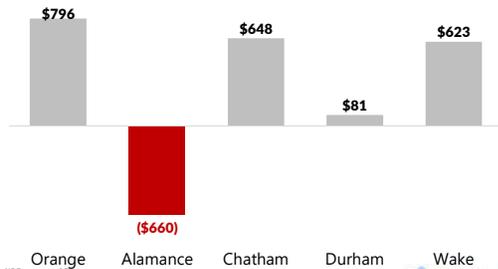
Source: ESR via NC Department of Commerce  
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### Orange Had Largest Retail Gap in 2016

Retail Gap— Demand Minus Supply (in Millions), 2016



Source: ESR via NC Department of Commerce  
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### Orange County Draws Outside Dollars in 4 Categories

2016 Retail Leakage (in Millions)



Source: ESR via NC Department of Commerce  
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### Chatham County Draws Outside Dollars in 1 Category

2016 Retail Leakage (in Millions)



Source: ESRI via NC Department of Commerce  
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### Alamance County Huge Draw for Outside Dollars

2016 Retail Leakage (in Millions)



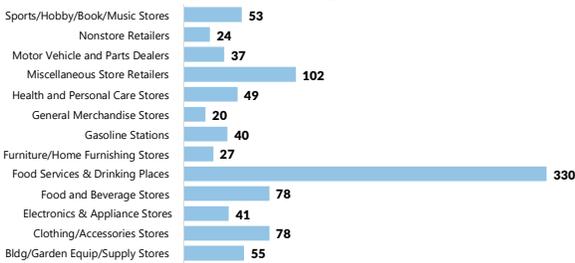
Source: ESRI via NC Department of Commerce  
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### Orange County Retail Businesses Detail

2016 Retail Businesses in Orange County by Category



Source: ESRI via NC Department of Commerce  
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### Chatham County Retail Businesses Detail

2016 Retail Businesses in Chatham County by Category



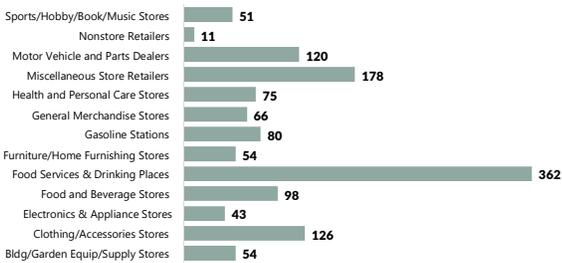
Source: ESRI via NC Department of Commerce  
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### Number of Alamance County Businesses by Sector

2016 Businesses in Alamance County by NAICS Codes



Source: ESRI via NC Department of Commerce  
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## Poverty

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## Percent of People in Poverty

	2000	2006	2011	2015
Orange County	10%	14%	17%	<b>14%</b>
Chatham County	9%	12%	11%	<b>12%</b>
Durham County	11%	16%	20%	<b>17%</b>
Wake County	7%	9%	12%	<b>11%</b>
North Carolina	12%	15%	18%	<b>16%</b>
United States	11%	13%	16%	<b>15%</b>

Source: U.S. Census Bureau Small Area Income and Poverty Estimates (SAIPE)

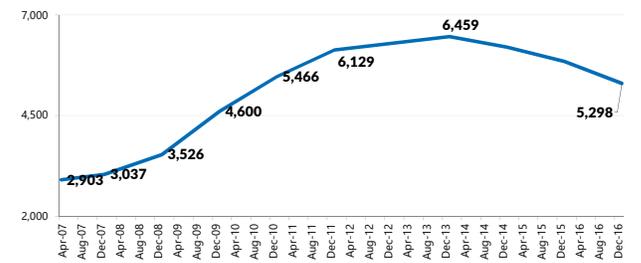
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## Food and Nutrition Services Cases at 7-Year Low

Food and Nutrition Services (Formerly Food Stamps) Average Cases by Month, Orange County, 2007-2016



Source: Orange County Department of Health and Human Services

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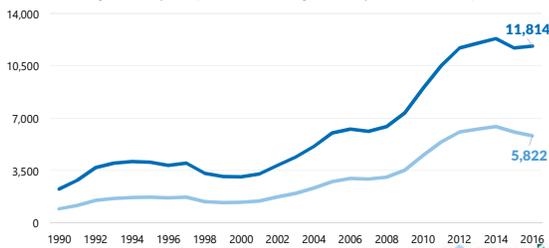
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## SNAP Households Decline, Orange County

Monthly Household Recipients Over Time

— Average Monthly Recipients — Average Monthly Household Recipients



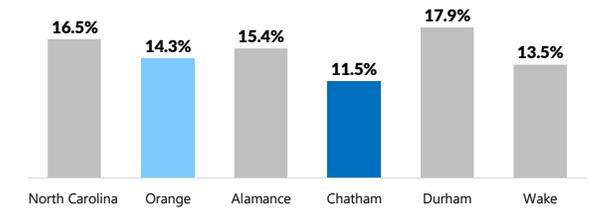
Source: NC Department of Health and Human Services

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## Food Insecurity Rate by County (2015)



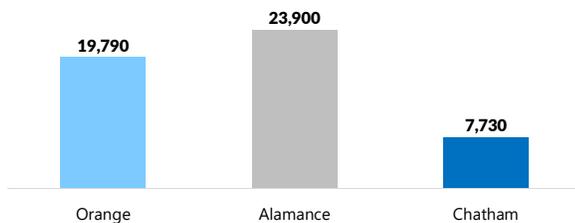
Source: Feeding America

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## Food Insecure People by County (2015)



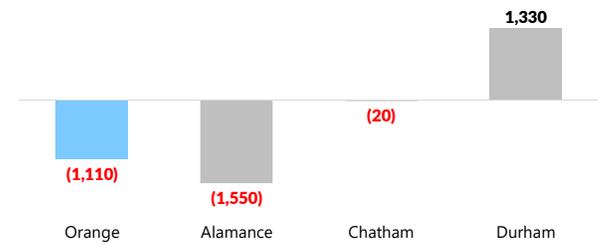
Source: Feeding America

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## Change in Food Insecure People, 2013-2015



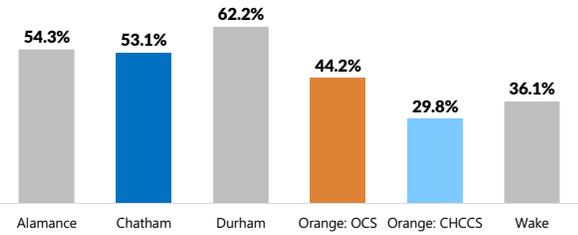
Source: Feeding America

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### Percent of Students Enrolled in Free and Reduced Lunch 2015-2016



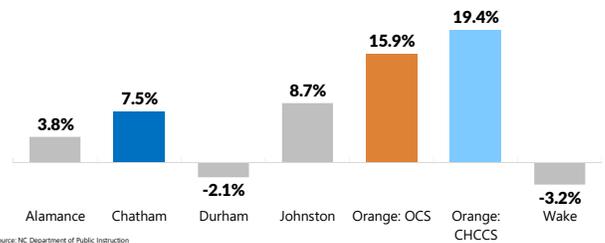
Source: NC Department of Public Instruction

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### Growth of Students Enrolled in Free and Reduced Lunch from 2009-2010 to 2015-2016



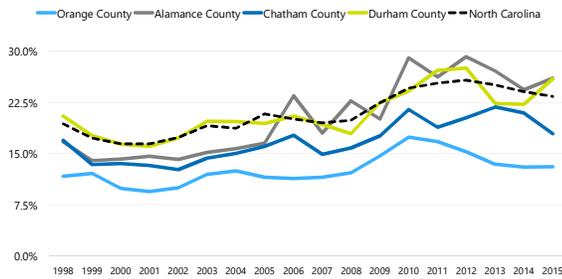
Source: NC Department of Public Instruction

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### Percent of Children in Poverty



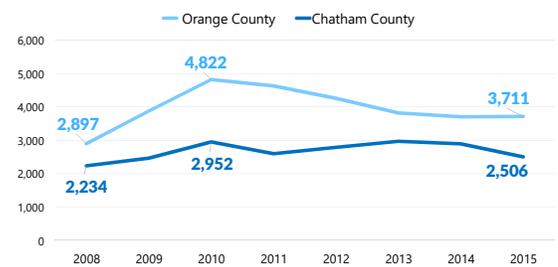
Source: U.S. Census Bureau Small Area Income and Poverty Estimates (SAIPE)

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### Number of Children in Poverty



Source: U.S. Census Bureau Small Area Income and Poverty Estimates (SAIPE)

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## Health Data

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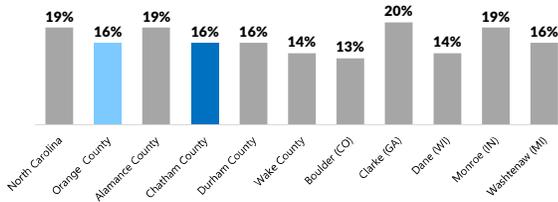
### 2016 Health Indicators

Health Indicator	Orange County	Chatham County	Who is #1
Length of Life	#1	#8	Orange
Quality of Life	#5	#14	Currituck
Health Behaviors	#4	#9	Polk
Clinical Care	#1	#11	Orange
Social & Economic Factors	#2	#9	Union
Physical Environment	#8	#53	Hyde

Source: 2016 County Health Rankings - Robert Wood Johnson Foundation

### Adult Smoking Rates

Compared to Adjacent and Peer Communities



Source: Robert Wood Johnson Foundation

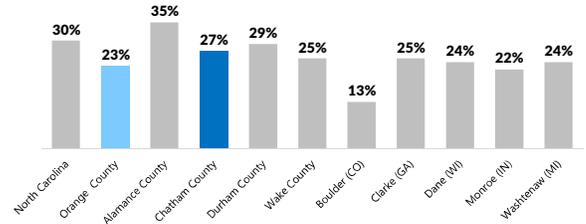
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### Adult Obesity

Compared to Adjacent and Peer Communities



Source: Robert Wood Johnson Foundation

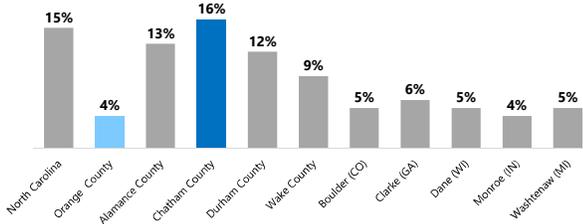
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### Disconnected Youth

Compared to Adjacent and Peer Communities



Source: Robert Wood Johnson Foundation

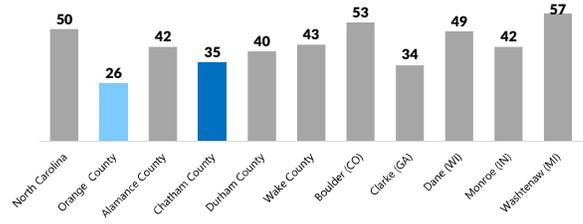
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### Residential Segregation - Black/White

Compared to Adjacent and Peer Communities



Source: Robert Wood Johnson Foundation

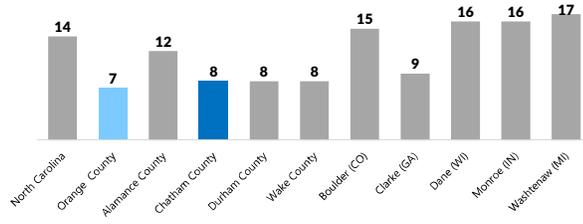
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### Drug Overdose Deaths per 100,000

Compared to Adjacent and Peer Communities



Source: Robert Wood Johnson Foundation

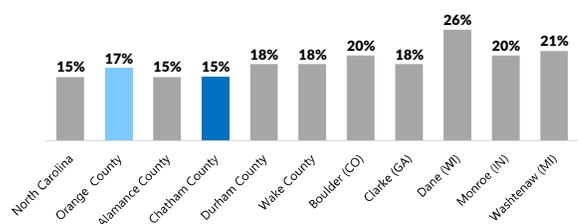
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### Excessive Drinking

Compared to Adjacent and Peer Communities



Source: Robert Wood Johnson Foundation

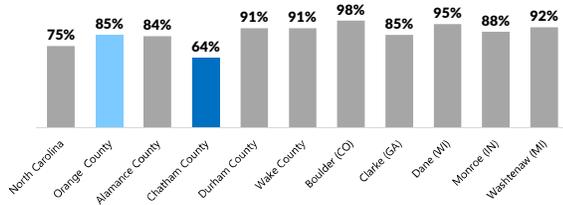
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## Access to Exercise Opportunities

Compared to Adjacent and Peer Communities



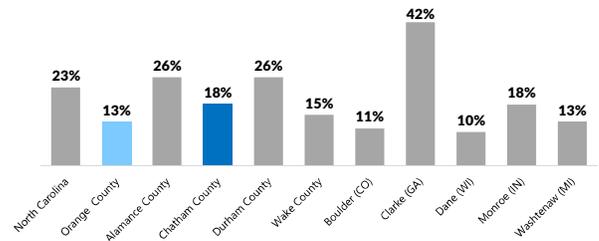
Source: Robert Wood Johnson Foundation

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## Orange County Children in Poverty Lowest Among NC Peers



Source: Robert Wood Johnson Foundation

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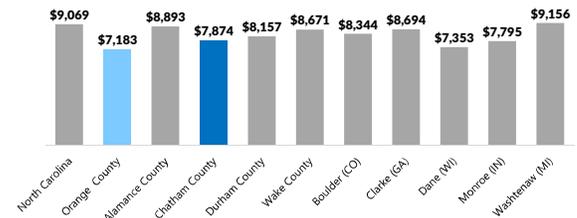
## Orange County Children Faring Better

	2011	2015
Low Birthweight	8.2%	7.0%
3 and 4 year-olds enrolled in school	57.6%	64.9%
Children living in poor or low income homes	33.0%	31.7%
Teen births age 15-17 (per 1000 girls)	9.2	Too small to measure
Children in foster care (per 1000)	6.7	5.4
Uninsured Children	9%	4.9%
Children assessed for abuse or neglect (per 1000)	38.4	41.5

Source: NC Child

## Health Care Costs

Compared to Adjacent and Peer Communities



Source: Robert Wood Johnson Foundation

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## Leading Causes of Death in 2015

Chatham County, NC	Orange County, NC
1. Cancer (21.4%)	1. Cancer (23.2%)
2. Heart Disease (19.1%)	2. Heart Disease (20.6%)
3. Cerebrovascular Disease (6.7%)	3. Cerebrovascular Disease (5.7%)
4. Alzheimer's Disease (5.2%)	4. Alzheimer's Disease (3.9%)
5. Chronic lower respiratory diseases (4.3%)	5. All Other Unintentional Injuries (3.7%)
6. Pneumonia and Influenza (3.3%)	6. Chronic lower respiratory diseases (2.9%)
7. All Other Unintentional Injuries (3.2%)	7. Diabetes mellitus (2.5%)
8. Diabetes mellitus (2.9%)	8. Chronic Liver Disease and Cirrhosis (1.8%)
9. Motor Vehicle Injuries (1.8%)	8. Septicemia (1.8%)
10. Nephritis, Nephrotic Syndrome & Nephrosis (1.7%)	10. Nephritis, Nephrotic Syndrome & Nephrosis (1.5%)

Source: NC Center for Health Statistics

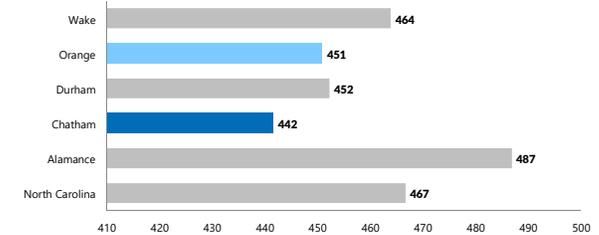
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## All Cancers Rate per 100,000

2011-2015



Source: N.C. State Center for Health Statistics

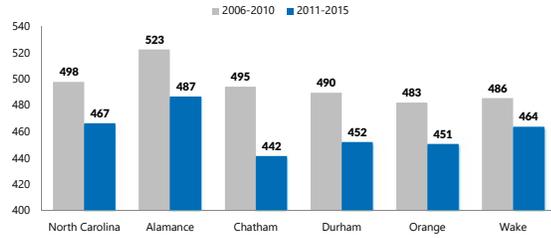
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### All Cancers Rate per 100,000

2006-2010 vs. 2011-2015



Source: N.C. State Center for Health Statistics

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### Colon/Rectum Cancer Rate per 100,000

2011-2015



Source: N.C. State Center for Health Statistics

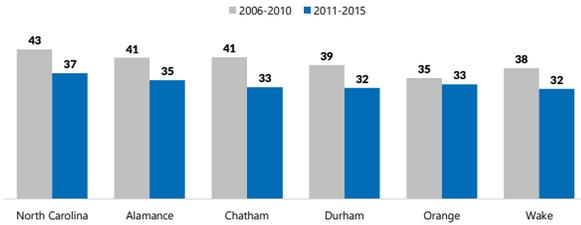
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### Colon/Rectum Cancer Rate per 100,000

2006-2010 vs. 2011-2015



Source: N.C. State Center for Health Statistics

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### Prostate Cancer Rate per 100,000

2011-2015



Source: N.C. State Center for Health Statistics

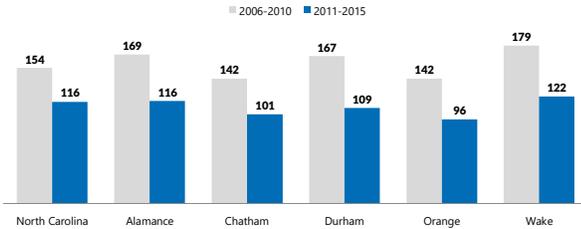
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### Prostate Cancer Rate per 100,000

2006-2010 vs. 2011-2015



Source: N.C. State Center for Health Statistics

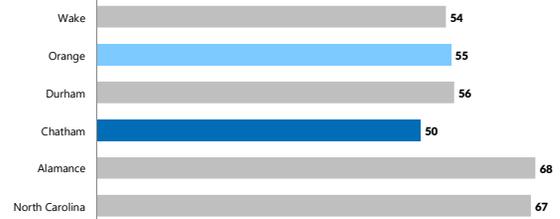
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### Lung/Bronchus Cancer Rate per 100,000

2011-2015



Source: N.C. State Center for Health Statistics

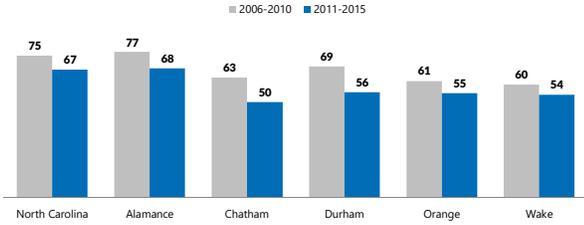
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### Lung/Bronchus Cancer Rate per 100,000

2006-2010 vs. 2011-2015



Source: N.C. State Center for Health Statistics

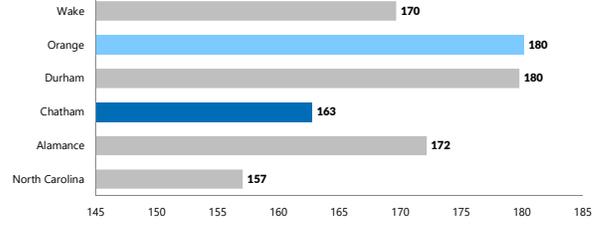
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### Female Breast Cancer Rate per 100,000

2011-2015



Source: N.C. State Center for Health Statistics

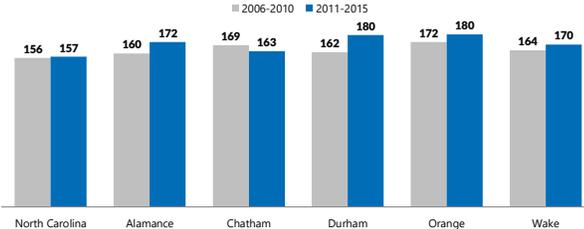
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### Female Breast Cancer Rate per 100,000

2006-2010 vs. 2011-2015



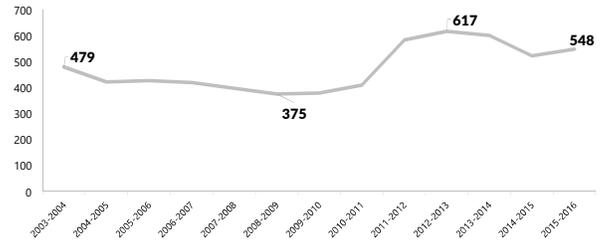
Source: N.C. State Center for Health Statistics

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### Orange County Rape Crisis Center Clients Served



Source: Orange County Rape Crisis Center

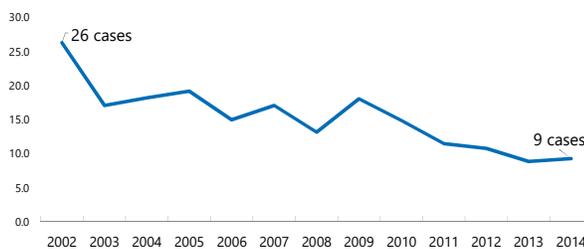
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### Orange County Teen Pregnancy Rates Decrease

Per 1000 Girls, Age 15-17



Source: NC Health and Human Services

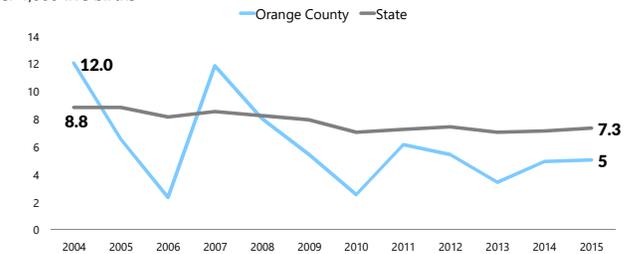
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### Orange County Infant Mortality Rate

Per 1,000 live births



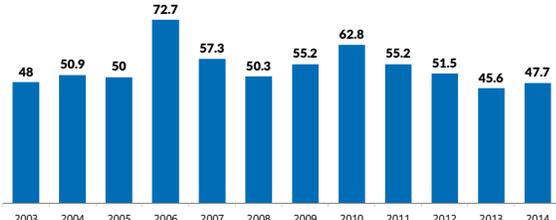
Source: NC Health and Human Services

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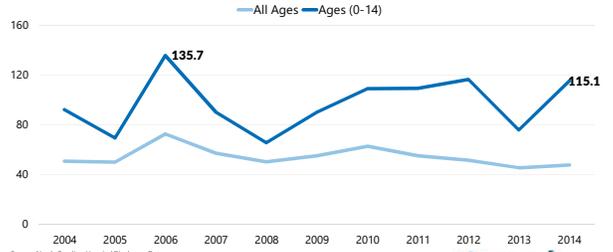


### Asthma in Hospital Discharges per 100,000



Source: North Carolina Hospital Discharge Data  
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SHARP BUSINESS SYSTEMS

### Asthma in Hospital Discharges per 100,000



Source: North Carolina Hospital Discharge Data  
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### % of NC Adults Who Answered Yes to: "Has a doctor, nurse or other health professional ever told you that you had asthma?"



Source: 2015 Behavioral Risk Factor Surveillance System (BRFSS)  
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### NC 2014 Emergency Department Visit with Primary Diagnosis of Asthma by County



Source: North Carolina Hospital Discharge Data  
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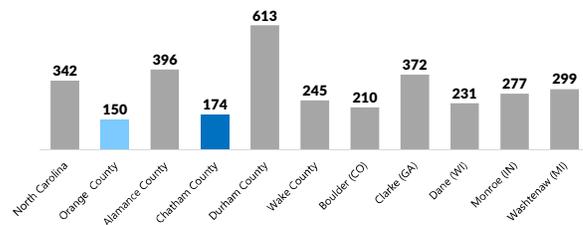
### NC 2014 Emergency Department Visits with the Primary Diagnosis of Asthma, Ages 0 -14, By County



Source: North Carolina Hospital Discharge Data  
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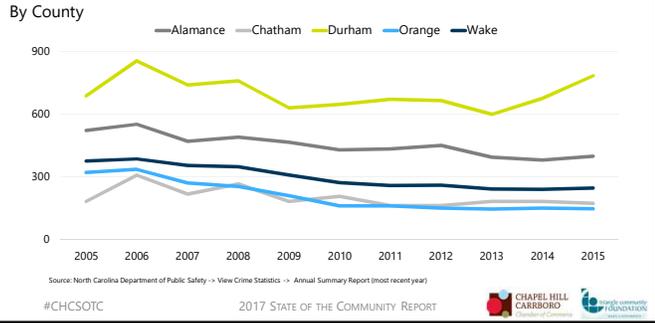
### Violent Crime per 100,000

Compared to Adjacent and Peer Communities

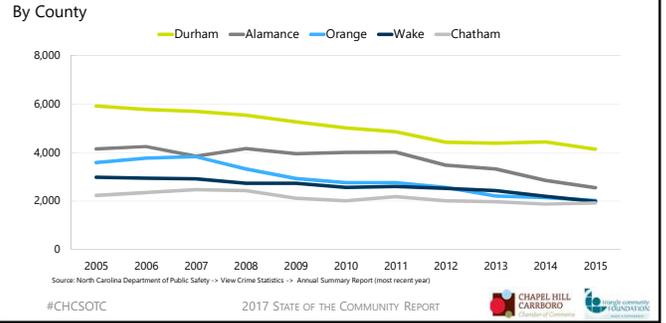


Source: Robert Wood Johnson Foundation  
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### Violent Crime Rate Per 100,000



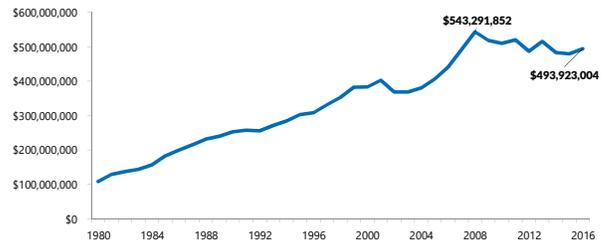
### Property Crime Rate Per 100,000



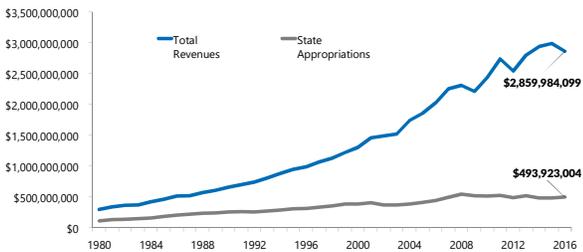
# UNC

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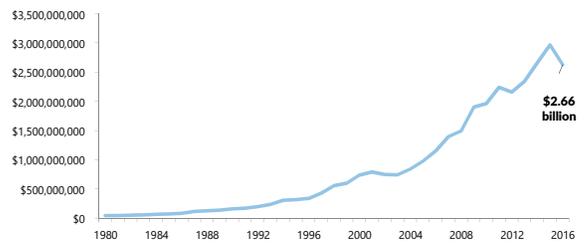
### NC Legislative Appropriations to UNC Chapel Hill



### UNC Chapel Hill Revenues Rise, State Appropriations Flat

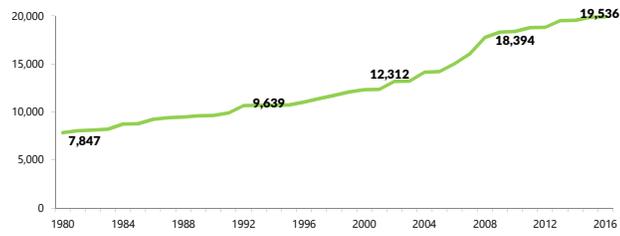


### Value of UNC Chapel Hill Endowment



### UNC Chapel Hill Campus Grows Past 19,500 sqft

Gross Square Feet of UNC Chapel Hill Campus



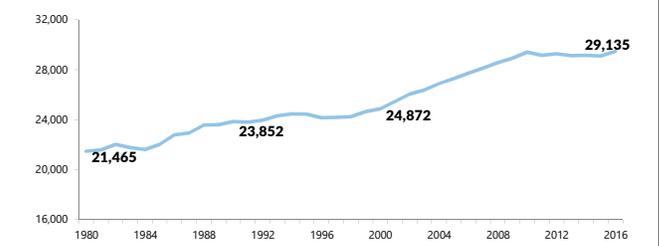
Source: OIRA  
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### UNC Chapel Hill Student Population Exceeds 29,135

Number of Students Enrolled at UNC, 1980-2016



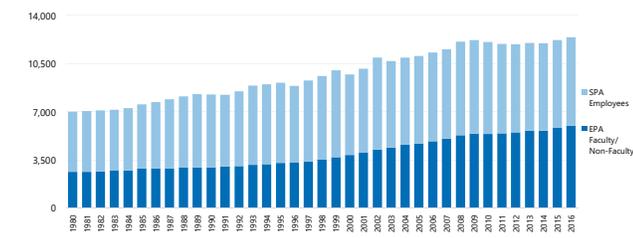
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### More than 12,000 Work for UNC Chapel Hill

UNC Employees by State Classification, 1980-2016



Source: OIRA

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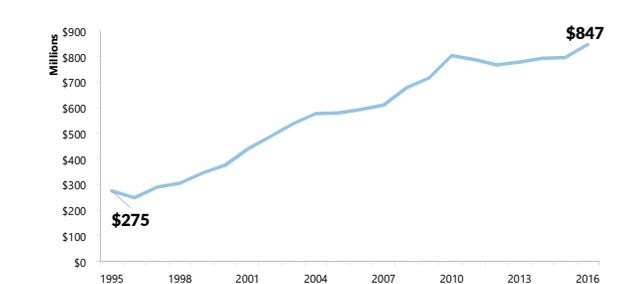
**UNC = Innovation**

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### UNC Annual Research Funding passes \$847 million



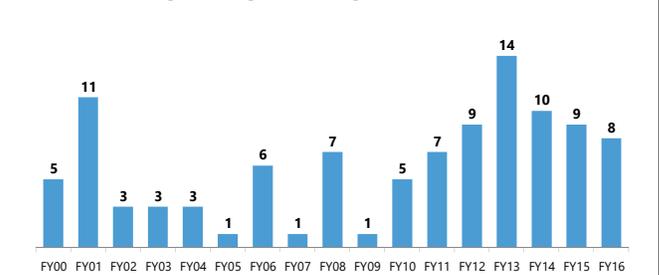
Source: UNC Office of Institutional Research

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### UNC Start-up Companies by Year



Source: UNC Office of Institutional Research

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UNC **start-up companies** since 2000

Source: UNC Office of Institutional Research  
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launch  chapel hill

A partnership between the town, county and university to **accelerate the development of high potential, high impact ventures** in Chapel Hill and Orange County.

launch  chapel hill

**64** companies served since 2012

**13** in 2016

**1,000 jobs** created by graduates

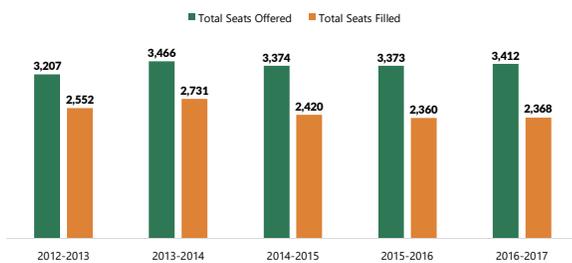
**25%** in Orange County

**\$20M** in funding raised by graduates

**\$7.3M** annual sales revenues of graduates

## Durham Tech

### Capacity Growing at Durham Tech Orange County Campus



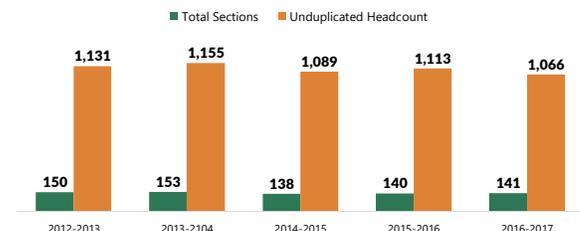
Source: Durham Tech  
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### # of Sections Offered and Unduplicated Enrollment

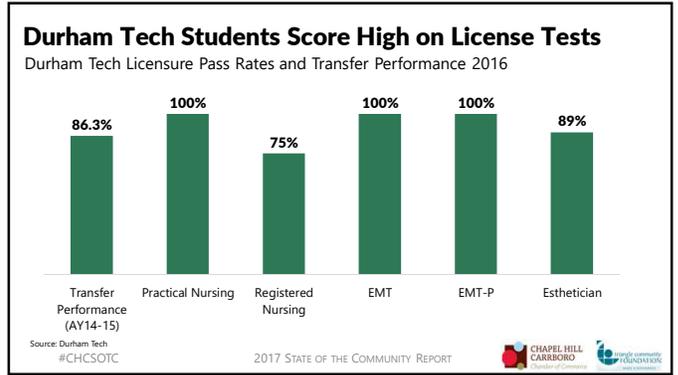
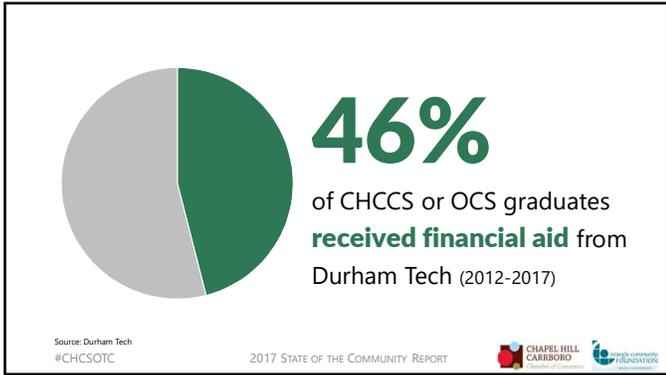
Durham Tech Orange County Campus



Source: Durham Tech  
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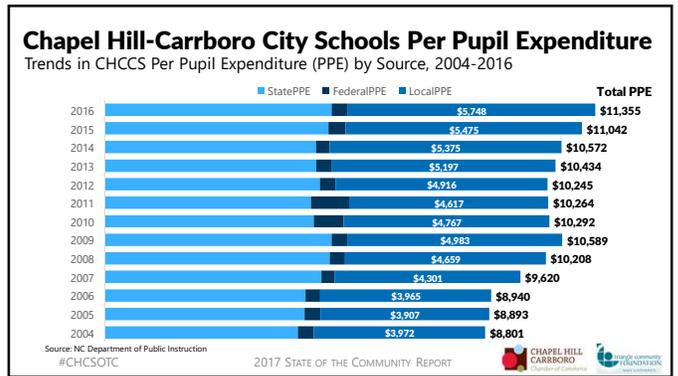
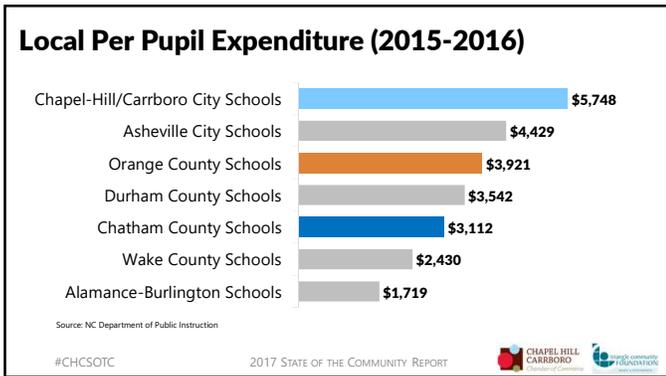
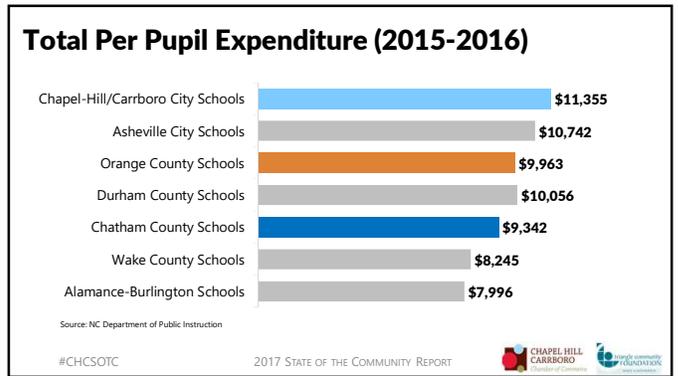


# Public Schools

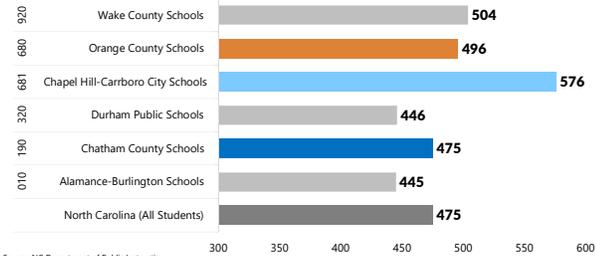
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CHAPEL HILL CARRBORO  
Durham Community Foundation



### Average SAT Writing Score 2016



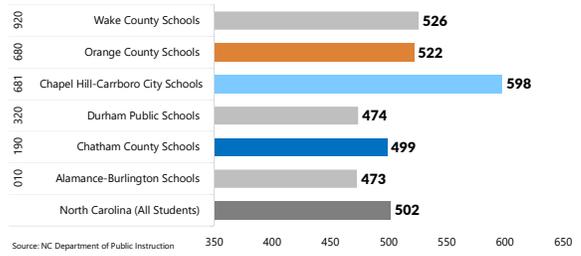
Source: NC Department of Public Instruction

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### Average SAT CR1 Score 2016



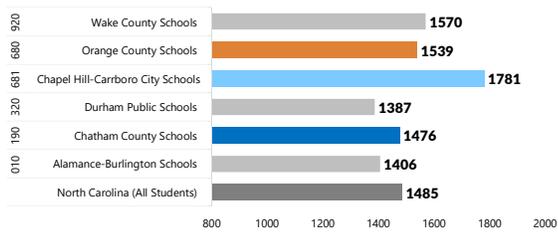
Source: NC Department of Public Instruction

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### Average SAT Combined Math, Writing & CR1 Scores 2016



Source: NC Department of Public Instruction

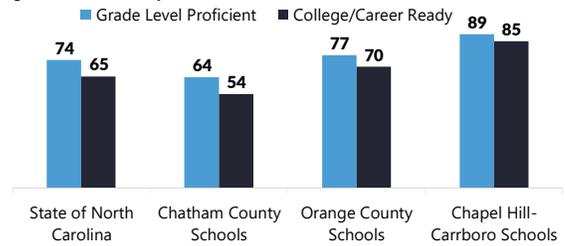
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### EOG Science Grade 3, 2015-16

College and Career Ready (Level 4 or 5) and Proficient (Level 3+)



Source: NC Department of Public Instruction

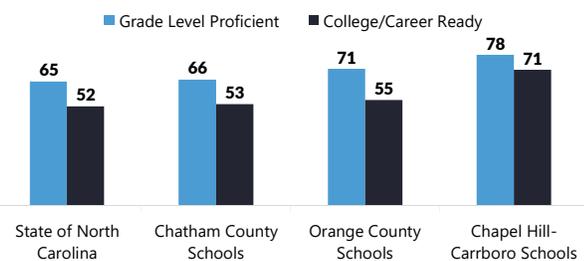
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### EOG Math Grade 3, 2015-16

College and Career Ready (Level 4 or 5) and Proficient (Level 3+)



Source: NC Department of Public Instruction

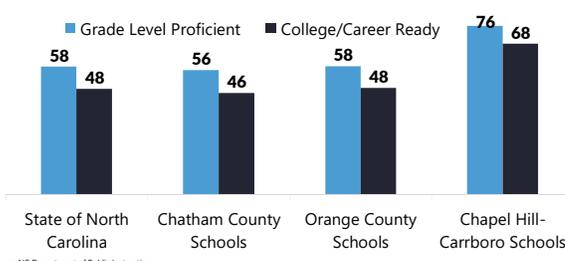
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### EOG Reading Grade 3, 2015-16

College and Career Ready (Level 4 or 5) and Proficient (Level 3+)



Source: NC Department of Public Instruction

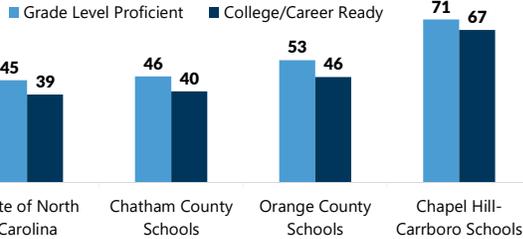
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### EOG Math Grade 8, 2015-16

College and Career Ready (Level 4 or 5) and Proficient (Level 3+)



Source: NC Department of Public Instruction

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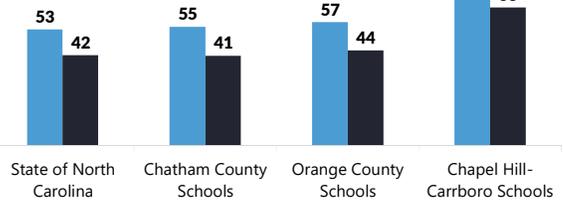
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### EOG Reading Grade 8, 2015-16

College and Career Ready (Level 4 or 5) and Proficient (Level 3+)

Grade Level Proficient (light blue) College/Career Ready (dark blue)



Source: NC Department of Public Instruction

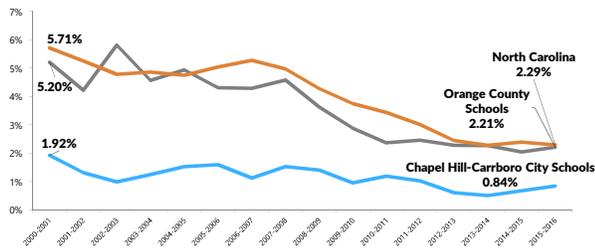
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### Local School Dropout Rate Declines

2000 through 2016



Source: NC DPI

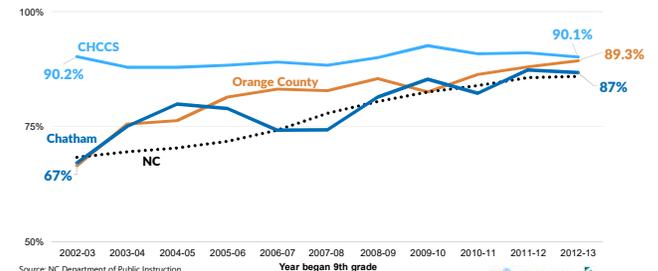
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### Rising Graduation Rates in Neighboring Districts, NC

Share of 9<sup>th</sup> Graders Graduated in 4 Years by 9<sup>th</sup> Grade Entry Year, 2002-03 to 2012-13 9<sup>th</sup> Graders



Source: NC Department of Public Instruction

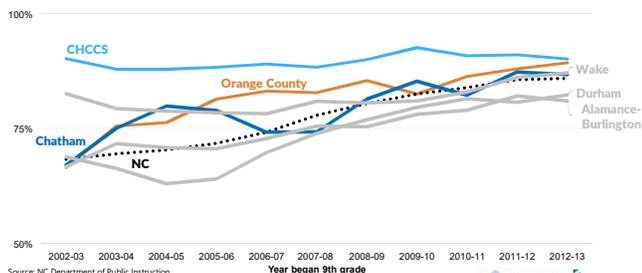
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### Rising Graduation Rates in Neighboring Districts, NC

Share of 9<sup>th</sup> Graders Graduated in 4 Years by 9<sup>th</sup> Grade Entry Year, 2002-03 to 2012-13 9<sup>th</sup> Graders



Source: NC Department of Public Instruction

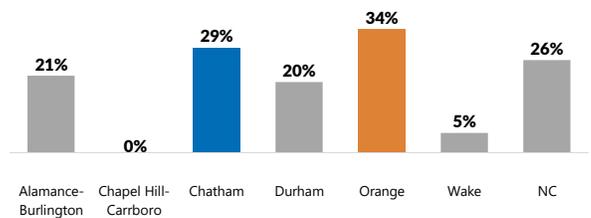
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### Graduation Rates Increasing

Percent Change in District Graduation Rates between 2006 and 2016



Source: NC Department of Public Instruction

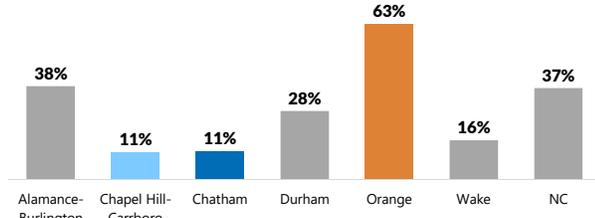
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### Black Student Graduation Rate Improvement

Percent Change in District Graduation Rates between 2006 and 2016



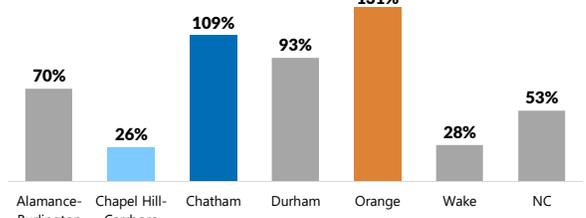
Source: NC Department of Public Instruction  
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### Hispanic Student Graduation Rate Improvement

Percent Change in District Graduation Rates between 2006 and 2016



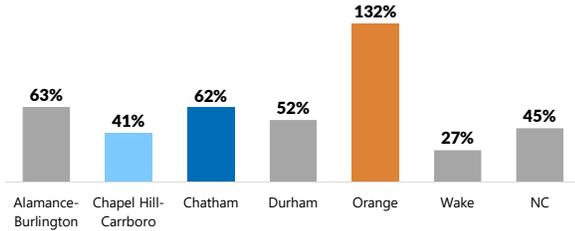
Source: NC Department of Public Instruction  
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### Economically Disadvantaged Student Graduation Rate Improvement

Percent Change in District Graduation Rates between 2006 and 2016



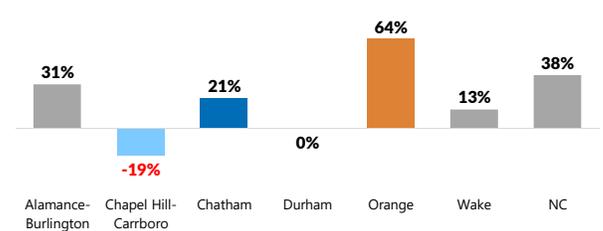
Source: NC Department of Public Instruction  
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### Students with Disabilities Graduation Rate Improvement

Percent Change in District Graduation Rates between 2006 and 2016



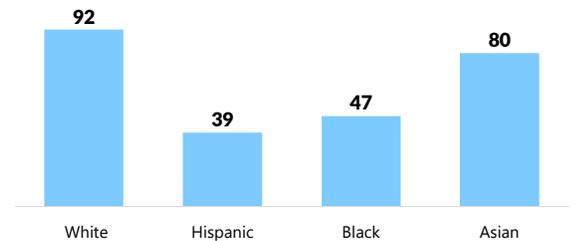
Source: NC Department of Public Instruction  
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### CHCCS EOG Reading Grade 3 Proficient

2015-2016 Grade 3 Proficient (Level 3+)



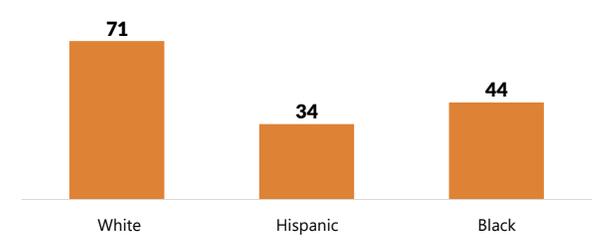
Source: NC Department of Public Instruction  
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### Orange County Schools EOG Reading Grade 3 Proficient

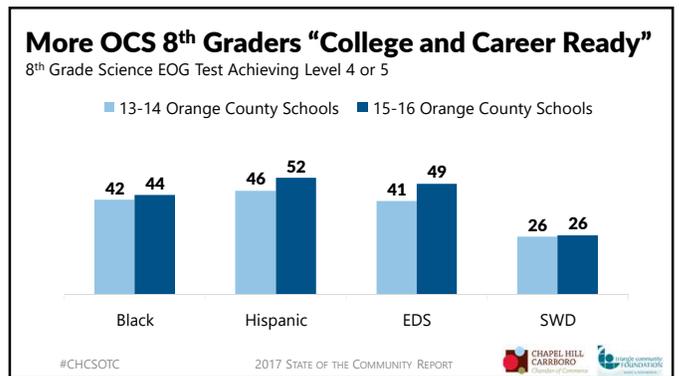
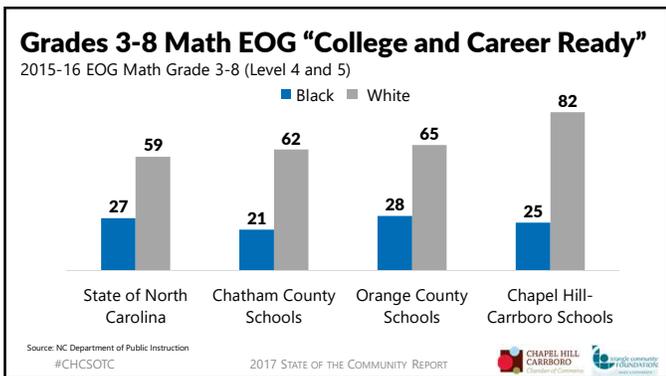
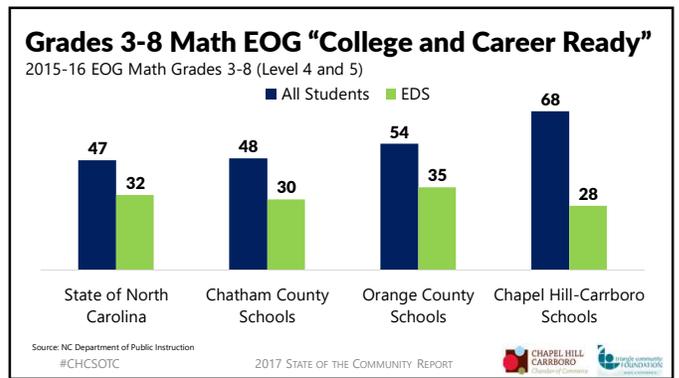
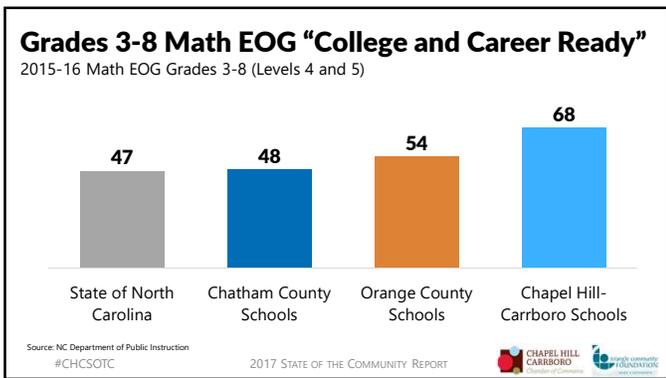
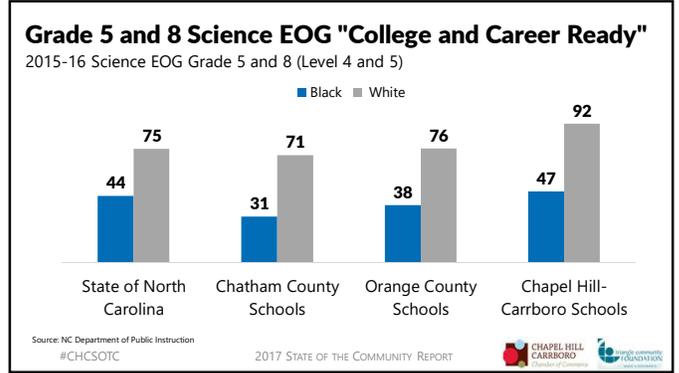
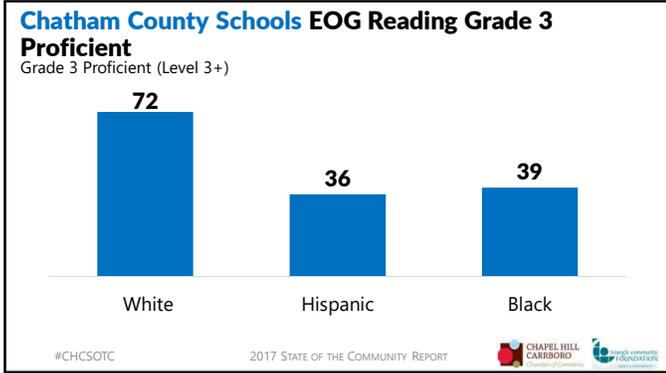
2015-16 Grade 3 Proficient (Level 3+)



Source: NC Department of Public Instruction  
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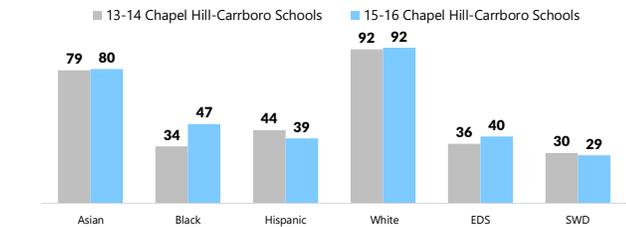
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## CHCCS 3<sup>rd</sup> Grade Reading Proficiency Inconsistent

Percent of Students Proficient (Level 3, 4 or 5) on Reading Grade 3 End of Grade Test



Source: NC Department of Public Instruction

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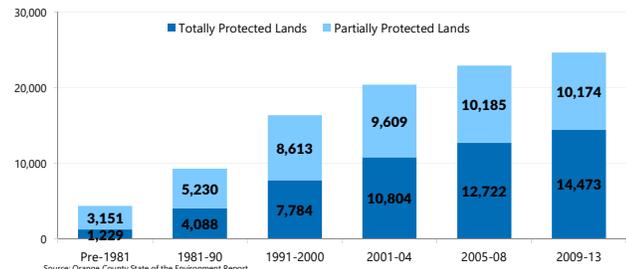
## Land & Water

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## Totally Protected Lands



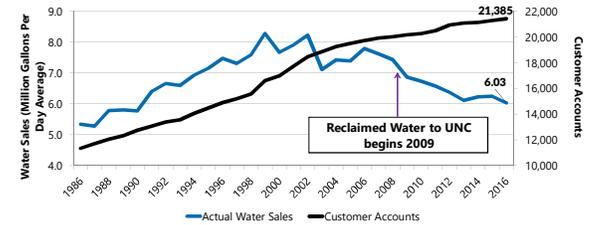
Source: Orange County State of the Environment Report

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## Water Sales and Accounts



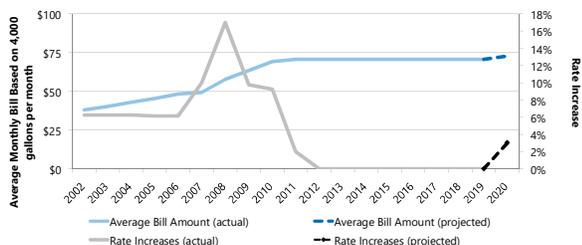
Source: OWASA

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## Monthly Water & Sewer Bills



Source: OWASA

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Thank you

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## Thank you to our Major Investors

### Gold Sponsors

