



# The Chamber

For a Greater Chapel Hill-Carrboro

## 15th Annual State of the Community Report

September 1, 2022 | UNC Friday Center

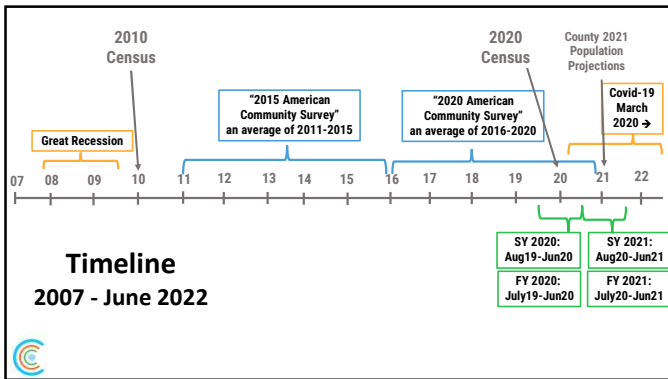
### Data Presentation

#### 2022 Data Partners

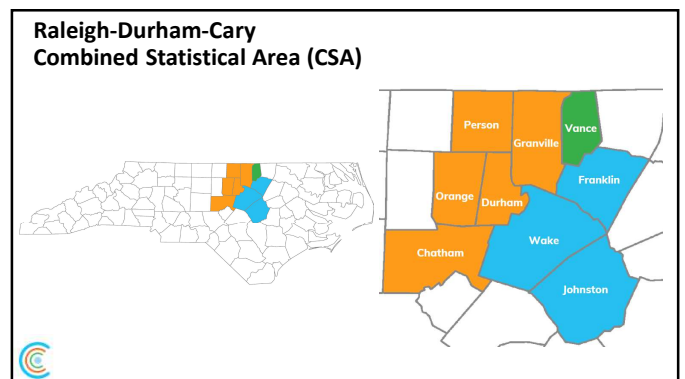
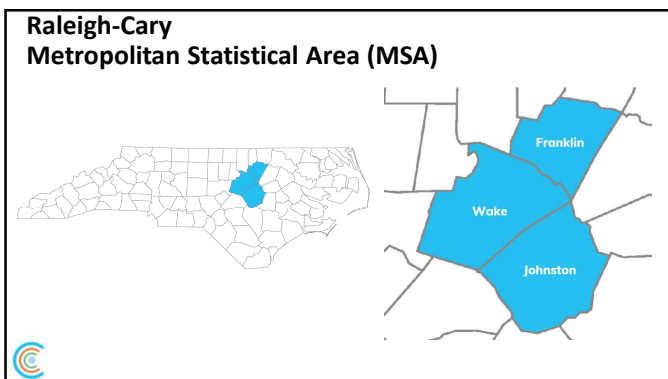
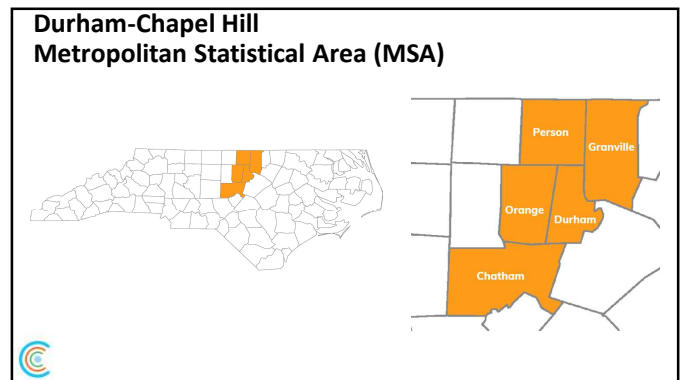
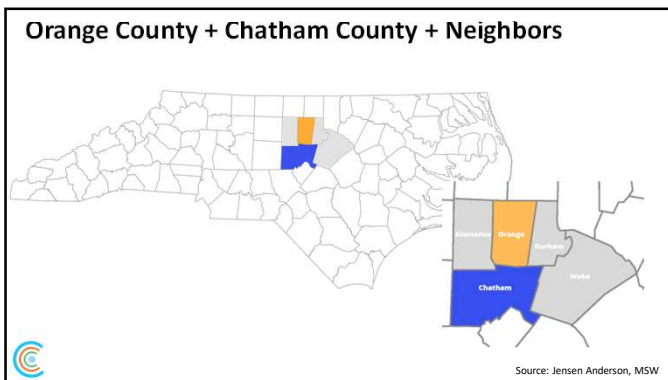


#### 2022 Community Champions





# Geography and Data Sets

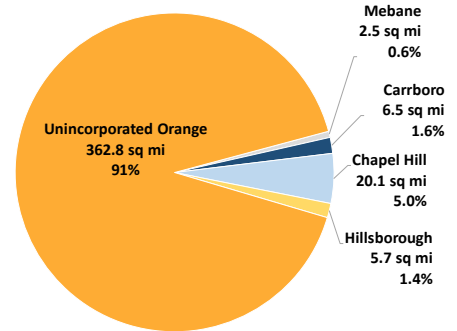


# County and Municipal Uses and Land Value



## 2020 Orange County Land Distribution

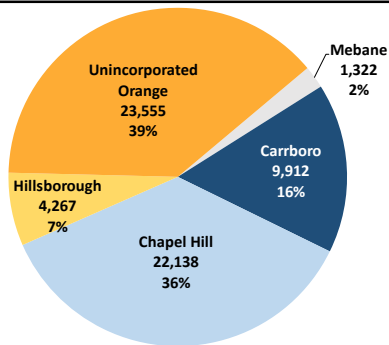
Total: 398 square miles



Source: 2020 Census

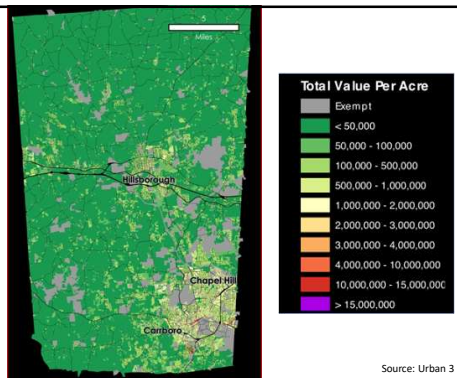
## 2020 Orange County Housing Distribution

61,211 total housing units



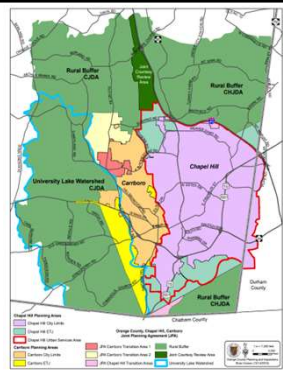
Source: 2020 Census

## Orange County Total Value Per Acre



Source: Urban 3

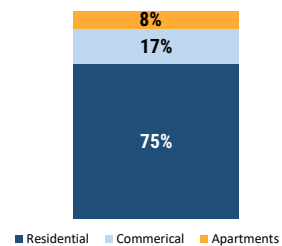
## Orange County-Chapel Hill-Carrboro Joint Planning Area and the Rural Buffer



Source: Orange County, 2015

## Orange County Assessed Value is 75% Residential, 17% Commercial, 8% Apartments in 2022

Orange County assessed value by uses

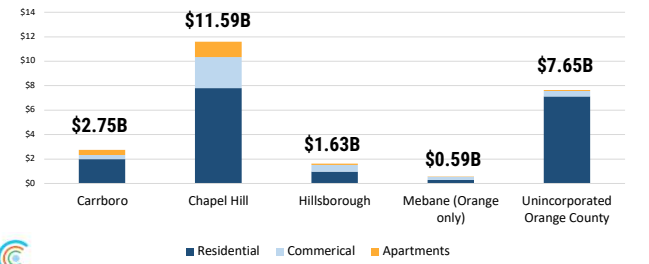


Orange County 2022 Total: \$24.2 Billion

Source: Orange County Tax Assessor

### Local Commercial, Apartment, and Residential Assessed Values Vary Across Jurisdictions

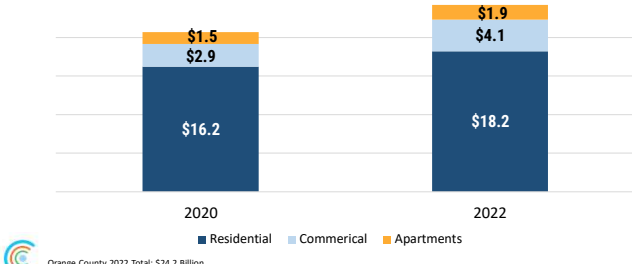
2022 total assessed values for areas of Orange County (in billions)



Source: Orange County Tax Assessor

### Orange County Residential Value Increases by \$2B, Commercial by \$1.2B from 2020 to 2022

Orange County (all) uses and assessed value (in billions)

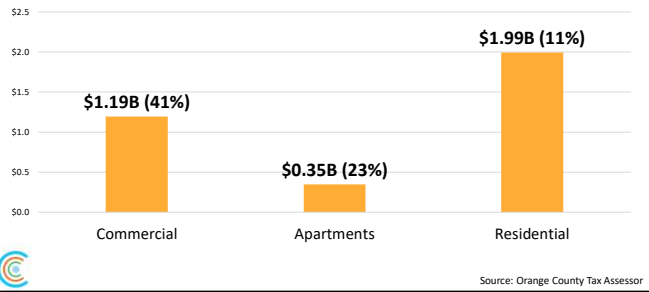


Orange County 2022 Total: \$24.2 Billion

Source: Orange County Tax Assessor

### Orange County Residential Growth in Assessed Value from 2020 to 2022 Outpaces Commercial

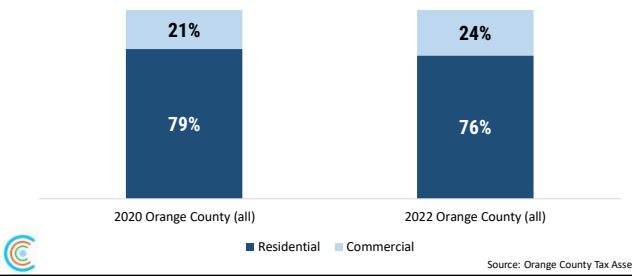
Increase in Orange County assessed value from 2020 to 2022 (in \$billions)



Source: Orange County Tax Assessor

### Orange County Commercial Assessed Value, as a Percent of Total Value, Grows from 21% to 24%

Commercial and residential assessed value percentages comparing 2020 with 2022 across Orange County Apartment Value assigned to either Commercial (for multifamily) or Residential (for single family units)

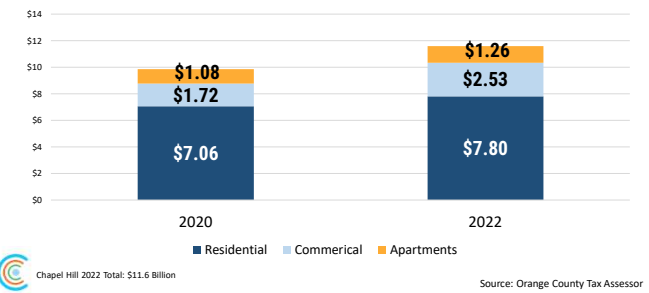


Residential Commercial

Source: Orange County Tax Assessor

### Chapel Hill Commercial Value Increases \$810 Million, Residential up \$740 Million from 2020 to 2022

Chapel Hill uses and assessed value (in billions)

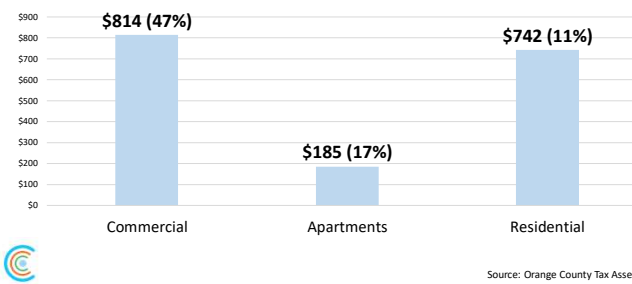


Chapel Hill 2022 Total: \$11.6 Billion

Source: Orange County Tax Assessor

### Chapel Hill Commercial Assessed Value Increases by 47% from 2020 to 2022

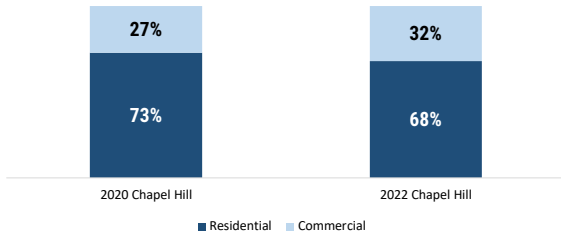
Change in Chapel Hill assessed commercial value from 2020 to 2022 (in \$millions)



Source: Orange County Tax Assessor

### Chapel Hill Commercial Assessed Value, as a Percent of Total Value, Grows from 27% to 32%

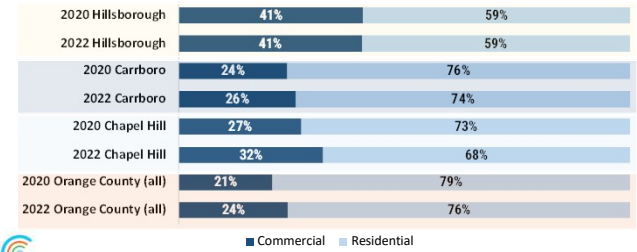
Commercial and residential assessed value percentages comparing 2020 with 2022 across Orange County (Apartment Value assigned to either Commercial (for multifamily) or Residential (for single family units))



Source: Orange County Tax Assessor

### Commercial Assessed Value, as a Percent of Total Value, Grows from 2020 to 2022

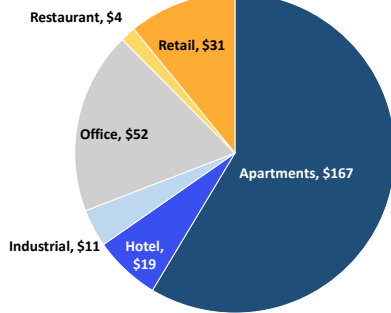
Commercial and residential assessed value percentages comparing 2020 with 2022 across Orange County (Apartment Value assigned to either Commercial (for multifamily) or Residential (for single family units))



Source: Orange County Tax Assessor

### 2021 Carrboro Commercial Building Value by Sector (in millions)

Total commercial value: \$284 million

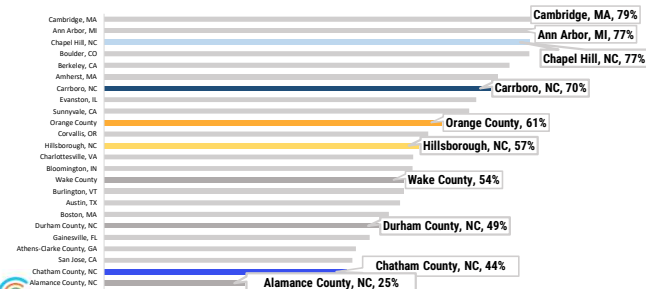


Source: Orange County Tax Assessor

## Educational Attainment

### Percent of Residents with a Bachelor Degree or Higher

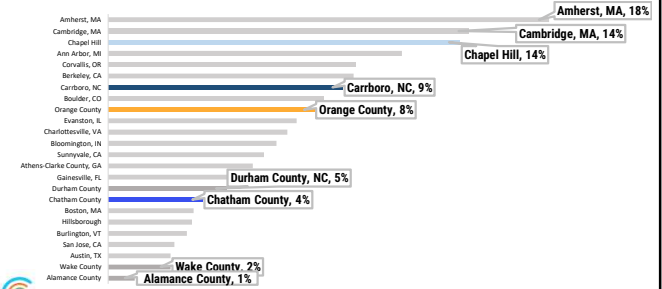
Percent of residents 25+ with a bachelor degree or higher, 2020



Source: American Community Survey 5-Year Estimates, 2016-20

### Percent of Residents with a Doctorate Degree

Percent of residents 25+ with a doctorate degree, 2020



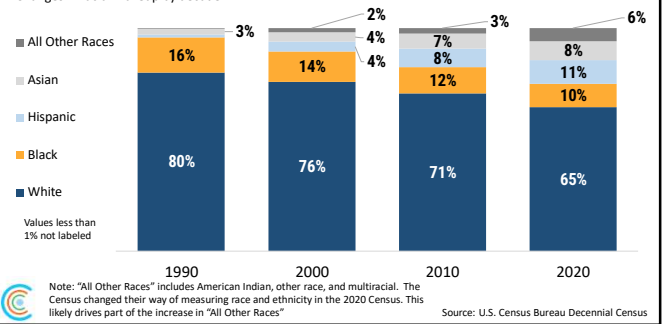
Source: American Community Survey 5-Year Estimates, 2016-20

# Race and Ethnicity



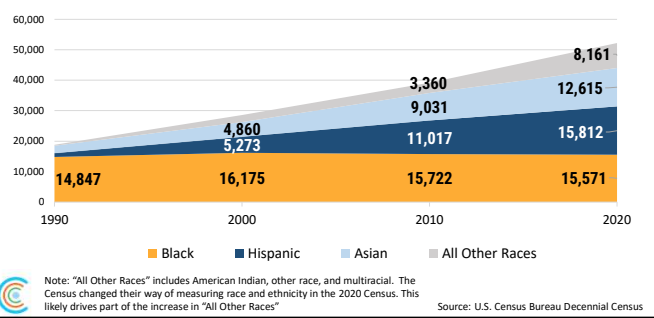
## Orange County Population by Race/Ethnicity

Changes in racial makeup by decade



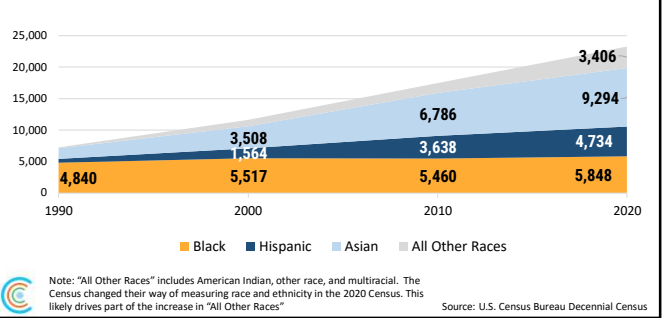
## Orange Minority Population by Race/Ethnicity

Changes in racial/ethnic makeup by decade



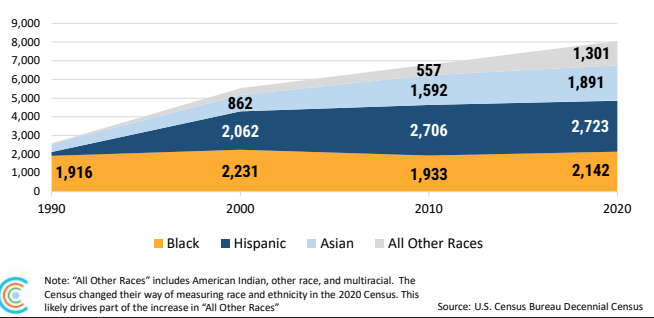
## Chapel Hill Minority Population by Race/Ethnicity

Changes in racial/ethnic makeup by decade



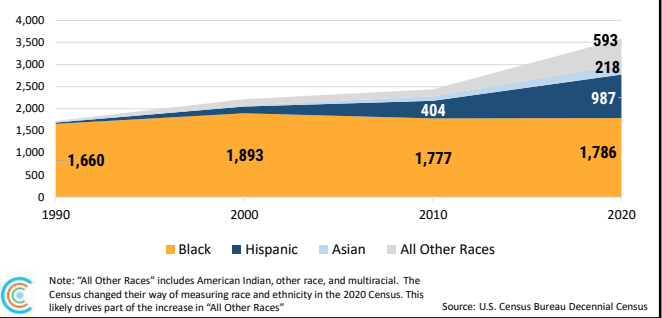
## Carrboro Minority Population by Race/Ethnicity

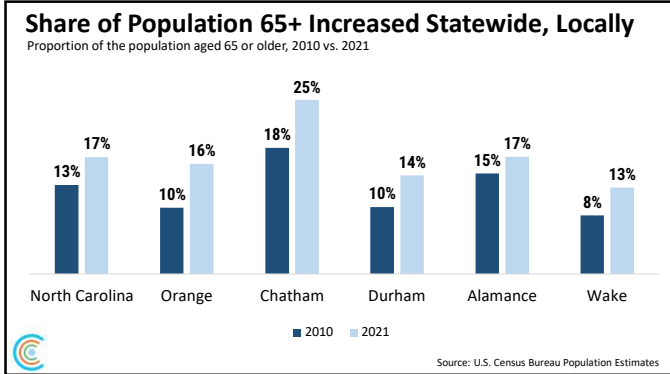
Changes in racial/ethnic makeup by decade



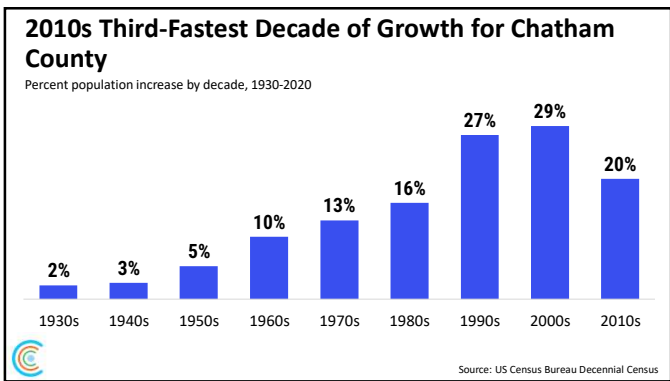
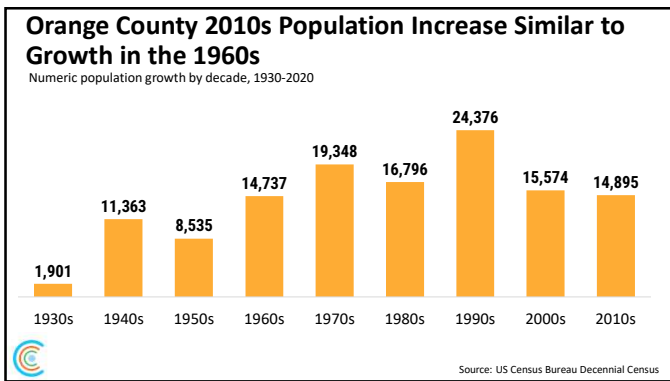
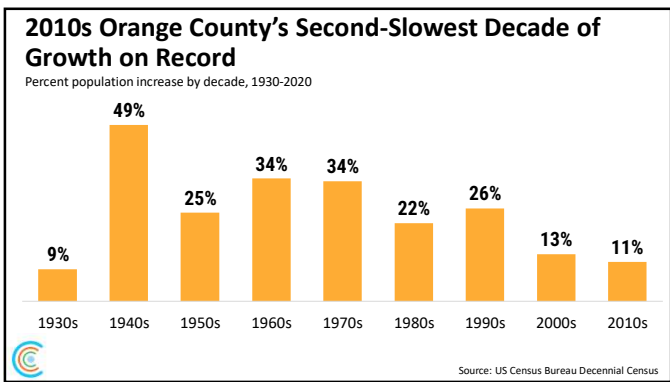
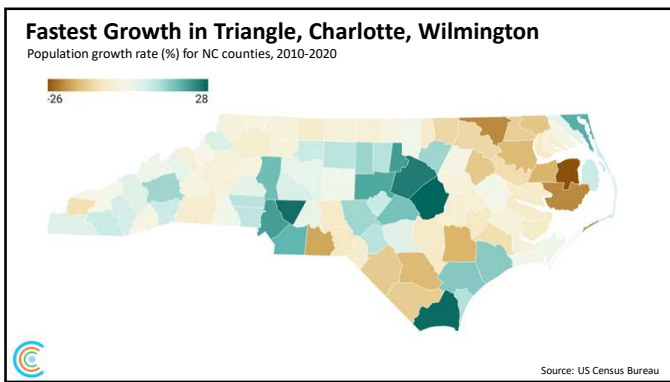
## Hillsborough Minority Population by Race/Ethnicity

Changes in racial/ethnic makeup by decade



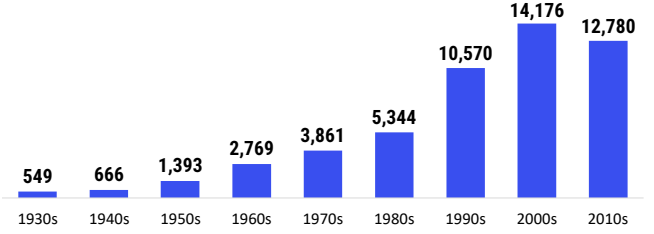


# Population Growth 2010-2020



### Chatham County Decennial Population Growth Second Largest On Record

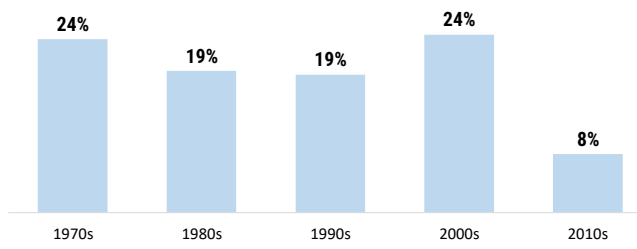
Numeric population growth by decade, 1930-2020



Source: US Census Bureau Decennial Census

### 2010s Slowest-Growing Decade for Chapel Hill Since 1970s

Percent population increase by decade, 1970-2020

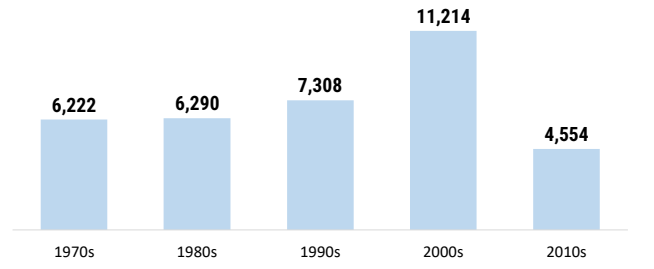


\*42% of town growth in 2000s was due to annexation

Source: US Census Bureau Decennial Census

### 2010s Mark Significant Drop from Chapel Hill's 2000s Peak\*

Numeric population growth by decade, 1970-2020

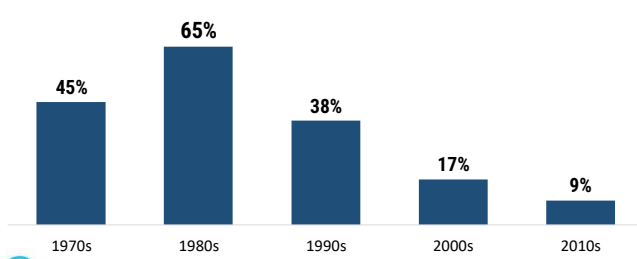


\*42% of town growth in 2000s was due to annexation

Source: US Census Bureau Decennial Census

### 2010s Slowest-Growing Decade for Carrboro Since 1970s

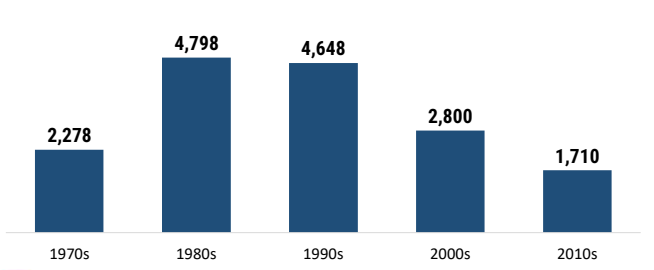
Percent population increase by decade, 1970-2020



Source: US Census Bureau Decennial Census

### 2010s Carrboro's Smallest Numeric Growth Since 1970s

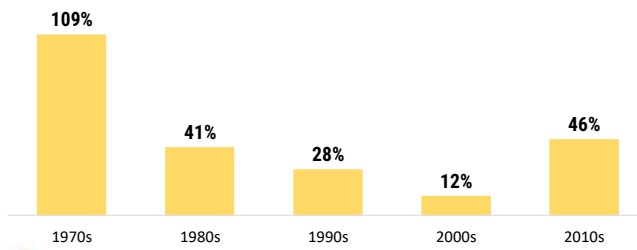
Numeric population growth by decade, 1970-2020



Source: US Census Bureau Decennial Census

### 2010s Second-Fastest-Growing Decade for Hillsborough Since 1970s

Percent population increase by decade, 1970-2020

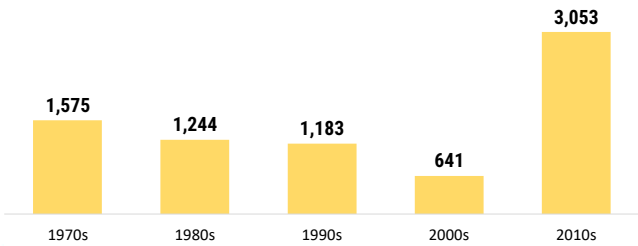


Source: US Census Bureau Decennial Census



### Hillsborough's 2010s Population Growth Largest Since 1970s

Numeric population growth by decade, 1970-2020



Source: US Census Bureau Decennial Census

### Chapel Hill and Carrboro Grow Less Than 1% Per Year, Hillsborough Averages 4.6% Per Year From 2010 to 2020

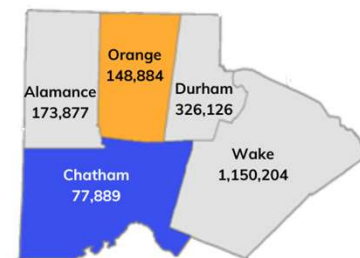
2010 and 2020 population totals, growth rate over the decade, and local annual growth rates

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

Source: US Census Bureau

## Population Growth 2020-2021

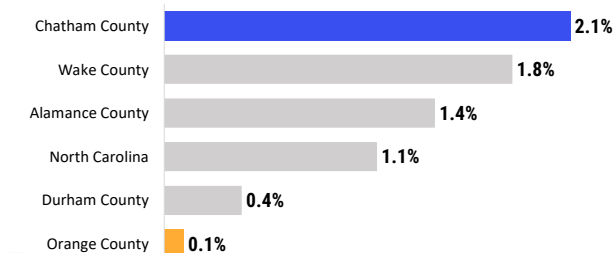
### 2021 County Population Totals



Source: US Census Bureau Population Estimates

### Chatham Grows Fastest Among Peer Counties in 2021

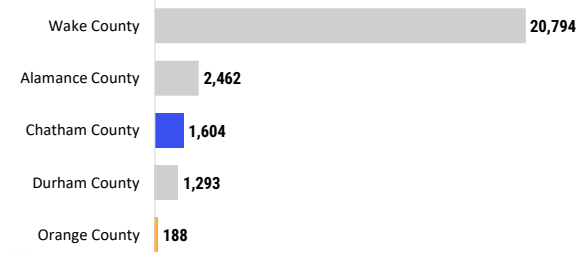
Percentage population growth from 2020 to 2021



Source: US Census Bureau Population Estimates

### Population Gain in 2021 Smallest in Orange County

Numeric population growth, 2020 to 2021 (North Carolina added 111,774 in same period)



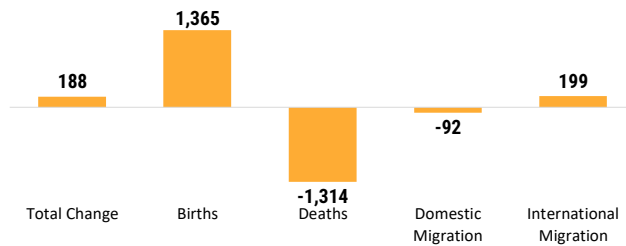
Source: US Census Bureau Population Estimates

# Components of Population Change 2020 to 2021



## Minimal Growth in Orange County from 2020 to 2021

Components of Orange County's estimated 188-person growth, 2020 to 2021

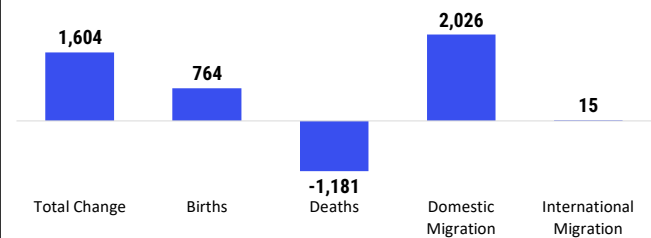


Note: The difference between total change and the sum of the individual components of change is known as the "residual." It is not shown here.

Source: U.S. Census Bureau Population Estimates

## Domestic Migration Drives Growth in Chatham County

Components of Chatham County's estimated 1,604-person growth, (April 1, 2020 - July 1, 2021)



Note: The difference between total change and the sum of the individual components of change is known as the "residual." It is not shown here.

Source: US Census Bureau Population Estimates

# Population Projections (in the DataBook)

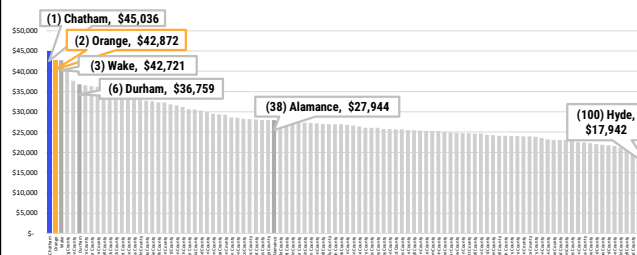


# Wages and Income

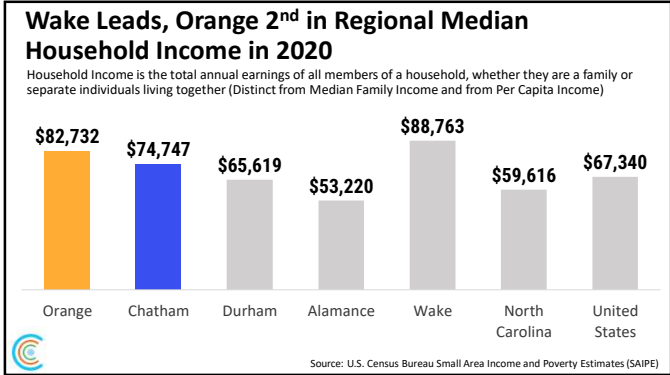
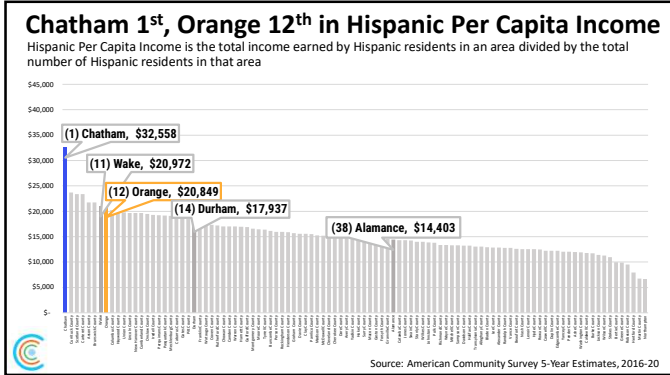
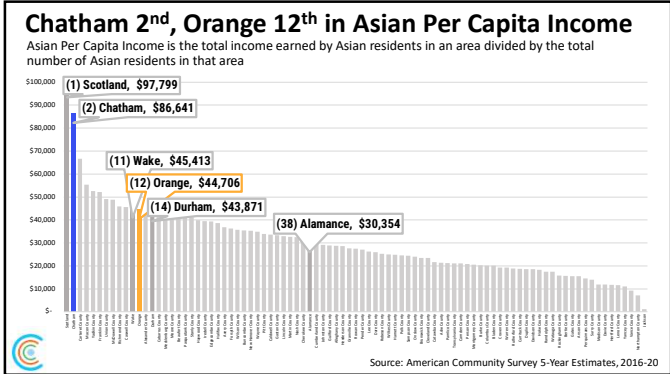
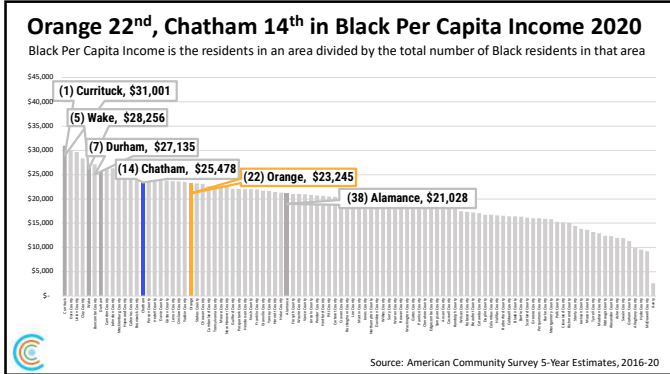


## Chatham, Orange Highest Per Capita Income in State

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 5-Year Estimates, 2016-20



### Orange Ranks 1<sup>st</sup>, Chatham 2<sup>nd</sup> in Average AGI

Average adjusted gross income (AGI) on all tax returns, by county, 2019

County	Average AGI on All Returns	Rank (of 100 Counties)
Orange County	\$105,716	1
Chatham County	\$102,507	2
Wake County	\$93,967	3
Durham County	\$72,507	9
Alamance County	\$55,894	35

Source: IRS

### Orange Ranks 1<sup>st</sup>, Chatham 3<sup>rd</sup> in AGI for Itemized Returns

Average adjusted gross income (AGI) on itemized tax returns, by county, 2019

County	Average AGI on Itemized Returns	Rank (of 100 Counties)
Orange County	\$294,505	1
Chatham County	\$261,444	3
Wake County	\$240,133	7
Durham County	\$176,581	32
Alamance County	\$172,456	36

Source: IRS

### Orange Top Five County in Dollars Given to Charity

Average itemized contribution to charitable causes on itemized tax returns, by county, 2019

	Average Itemized Contributions Reported	Rank (of 100 Counties)
Orange County	\$17,102	5
Wake County	\$12,537	33
Chatham County	\$12,278	42
Durham County	\$10,855	50
Alamance County	\$10,845	70



Source: IRS

### Orange and Chatham Rank Near Bottom in Percent of AGI Contributed to Charitable Causes

Average percent of adjusted gross income (AGI) contributed to charitable causes on itemized tax returns, by county, 2019

	Percent of AGI Contributed	Rank (of 100 Counties)
Durham County	7%	67
Alamance County	6%	77
Orange County	6%	84
Wake County	5%	93
Chatham County	5%	96



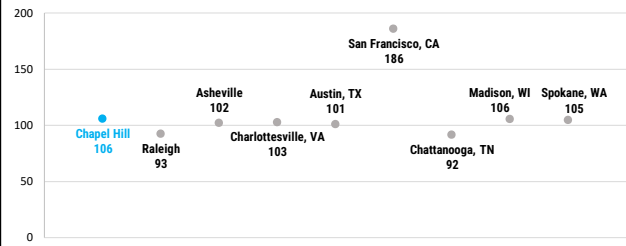
Source: IRS

## Cost of Living



### 2021 Q3 Cost of Living: Composite Index

(100 = national average)



Source: C2ER (Council for Community and Economic Research), Q3 2021

## Top Employers and Industries



### Orange County Top 25 Employers, 2021

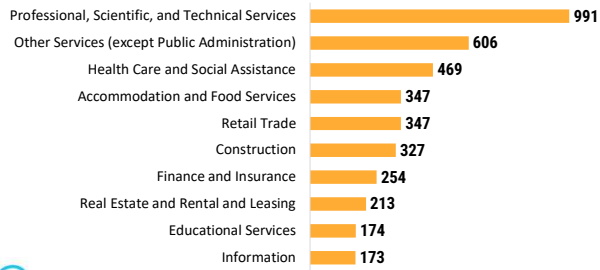
1. UNC Chapel Hill
2. UNC Health Care System
3. Chapel Hill-Carrboro City Schools
4. Orange County Schools
5. Orange County Government
6. Industrial Connections & Solutions
7. Eurosport
8. Town Of Chapel Hill
9. Wal-Mart
10. Armacell
11. Harris Teeter
12. AKG Of America
13. PHE Inc
14. Summit Design & Engineering Service
15. Carol Woods Retirement Community
16. Food Lion
17. United Parcel Service
18. Wellspring Grocery (*Whole Foods*)
19. Weaver Street Market
20. Wegman's
21. Westrock Services LLC
22. Noom Inc.
23. Residential Services
24. Aramark
25. Hyatt Corporation



Source: NC Department of Commerce and Orange County Economic Development

### Top 10 Orange County Industries by Number of Enterprises

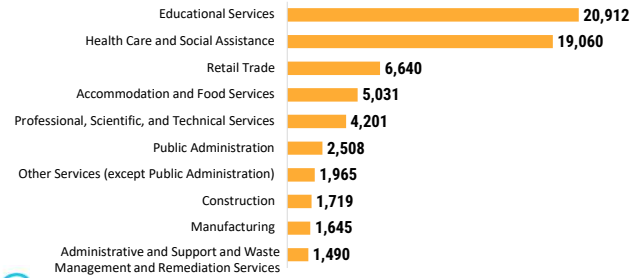
Organized by NAICS code, 2021



Source: Quarterly Census of Employment and Wages (QCEW) via NC Department of Commerce

### Top 10 Orange County Industries by Average Employment

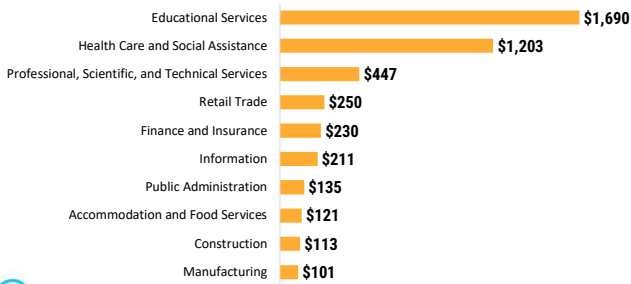
Organized by NAICS code, 2021



Source: Quarterly Census of Employment and Wages (QCEW) via NC Department of Commerce

### Top 10 Orange County Industries by Total Wages (in millions)

Organized by NAICS code, 2021

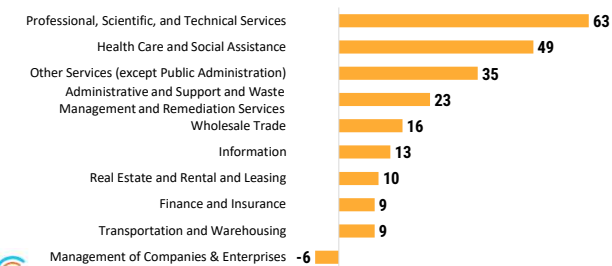


Source: Quarterly Census of Employment and Wages (QCEW) via NC Department of Commerce

## Orange County Industry Segment Change 2020 to 2021

### Change in Number of Enterprises by Sector from 2020 to 2021

Industry segments with largest gains and losses in number of enterprises; organized by NAICS code, 2021



Source: Quarterly Census of Employment and Wages (QCEW) via NC Department of Commerce

### Change in Number of Jobs by Sector from 2020 to 2021

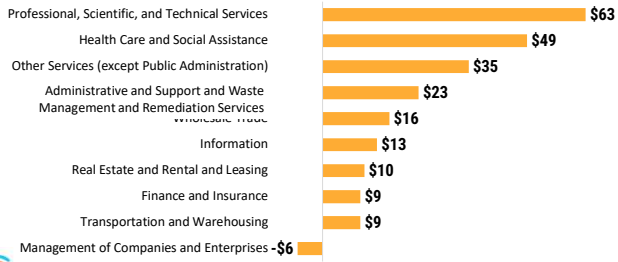
Top Industry Segments that saw the largest gains and losses in Annual Average Employment from 2020 to 2021, organized by NAICS code



Source: Quarterly Census of Employment and Wages (QCEW) via NC Department of Commerce

### Change in Gross Wages Paid by Sector from 2020 to 2021

Industry segments with largest gains and losses in Total Annual Wages (\$millions) from 2020 to 2021, organized by NAICS code

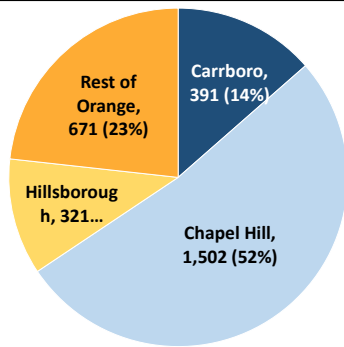


Source: Quarterly Census of Employment and Wages (QCEW) via NC Department of Commerce

## Orange County Employer Firms (Firms with Employees)

### Estimated Number of Orange County Employer Firms

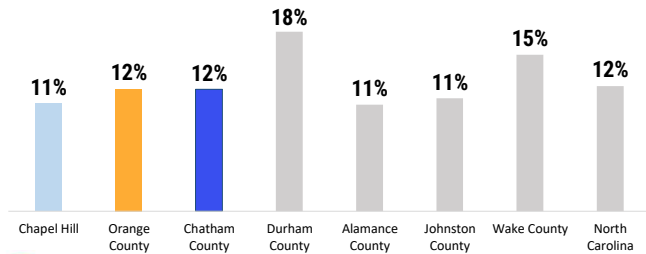
Total = 2,885



Source: Census Bureau, 2017 Business Survey

### Minority-Owned Employers Make Up 11-18% of All Firms

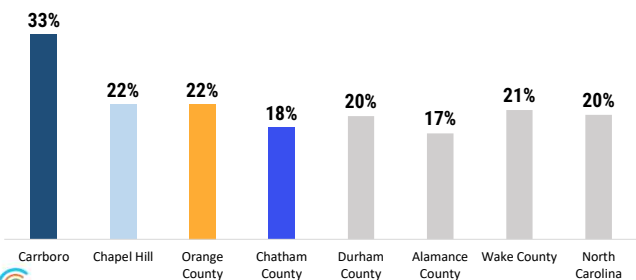
Estimated minority-owned employer firms as percent of all firms



Source: Census Bureau, 2017 Business Survey

### 33% of All Carrboro Firms are Women-Owned

Estimated women-owned employer firms as percent of all firms

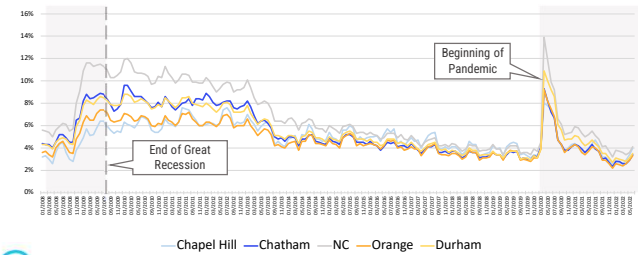


Source: Census Bureau, 2017 Business Survey

## Unemployment and the Labor Force

### Pandemic Leads to Larger Spike in Unemployment, With Faster Recovery than Great Recession

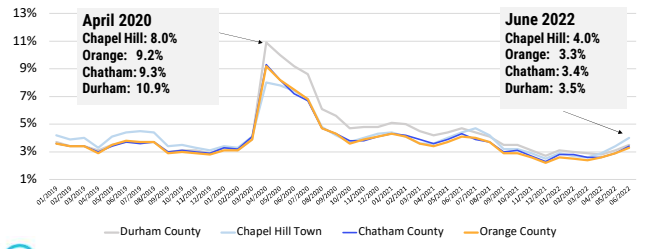
Monthly unemployment rate (unadjusted), January 2008 – June 2022



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

### Unemployment Declines from April 2020 Peak

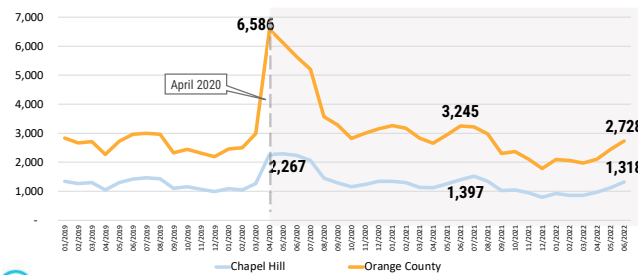
Monthly unemployment rate (unadjusted), January 2019 to June 2022



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

### Unemployment Returns to Pre-Pandemic Levels

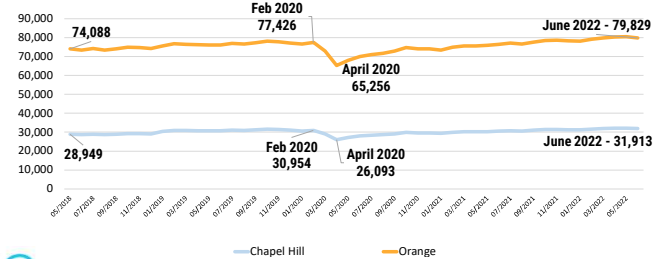
Monthly unemployed individuals, 1/2019 – 6/2022



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

### Orange County Residents Employed Exceeds Pre-Pandemic Levels

Monthly employed individuals, May 2018 to June 2022

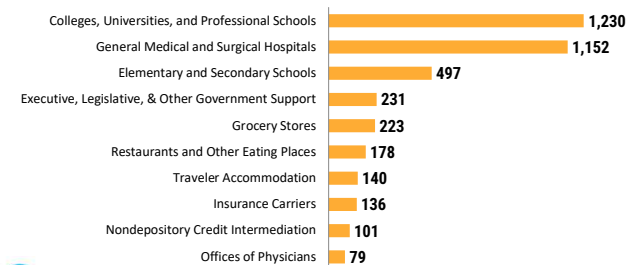


Source: Local Area Unemployment Statistics (LAUS) via NC Department of Commerce

## Available Jobs

### Top Orange County Industries With Active Job Listings

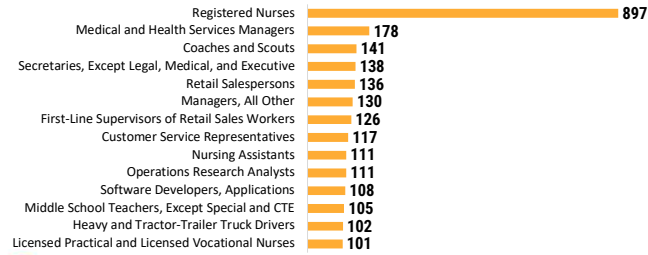
Top Orange County industries by number of active job postings, July 30, 2022 – Aug 28, 2022



Source: Labor Insight

### 897 Registered Nursing Positions Open in Orange

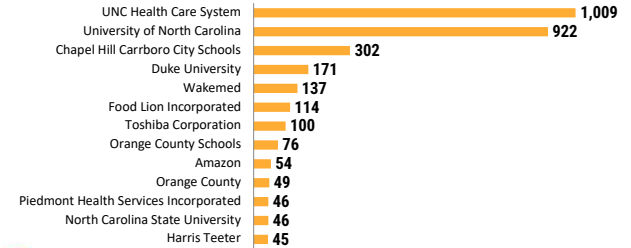
Orange County's most in-demand positions by number of active job postings, July 30, 2022 – Aug 28, 2022



Source: Labor Insight

### UNC and UNC Health Have 1,931 Openings in Orange

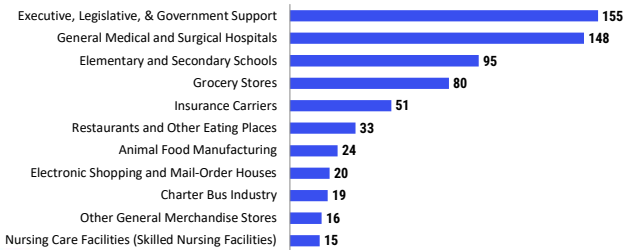
Orange County employers with the most job openings by number of active job postings, July 30, 2022 – Aug 28, 2022



Source: Labor Insight

### Government and Health Lead Open Positions in Chatham

Top Chatham County industries by number of active job postings, July 30, 2022 – Aug 28, 2022



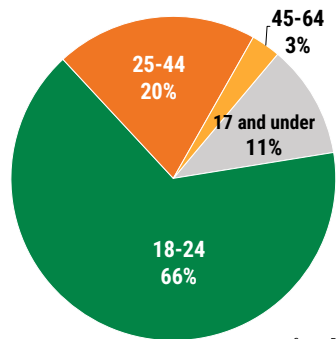
Source: Labor Insight

# Durham Tech



### Age of Orange County Residents in Durham Tech Credit Classes (SY2022)

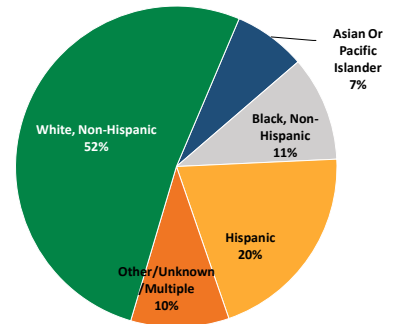
Age of Orange County Residents in Durham Tech credit classes, SY2022 (total=274)



Source: Durham Tech

### 48% of Orange County Residents in Durham Tech in Credit Classes are Non-White

Racial makeup of Orange County residents in Durham Tech credit classes SY2022 (total=274)

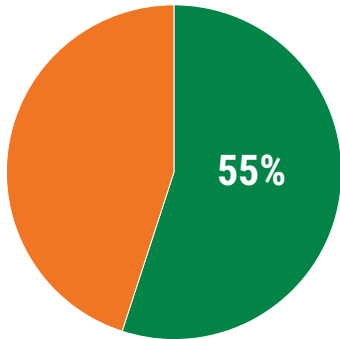


Source: Durham Tech



**55% of Durham Tech Students Who Graduated from High Schools in Orange County Received Financial Aid**

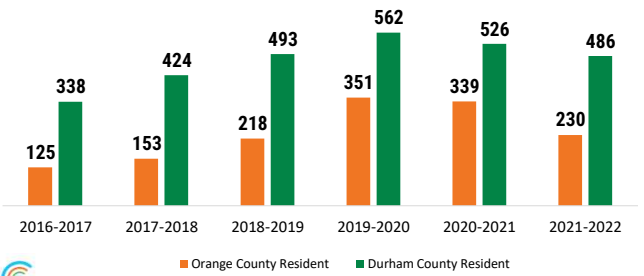
Pell Grants and other forms of financial aid, 2021-2022



Source: Durham Tech

**Durham Tech High School Dual Enrollment**

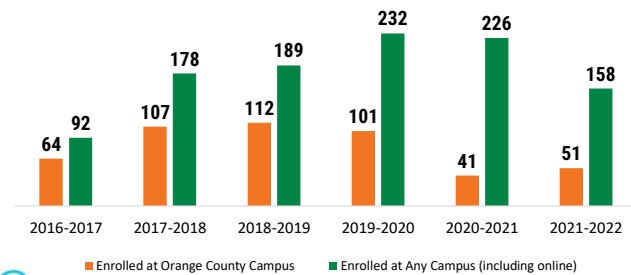
Dually enrolled students at Durham Tech by county of residence, SY2017 to SY2022



Source: Durham Tech

**Orange Promise Remains Strong Despite Pandemic**

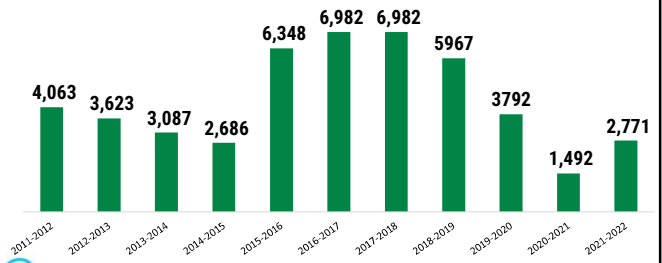
Orange Promise credit students taking classes at Durham Tech, SY2017 to SY2022



Source: Durham Tech

**Durham Tech In-Person Continuing Education Enrollment Begins Pandemic Rebound**

Continuing Education total in-person seats used, Durham Tech Orange County Campus, SY2012 to SY2022



Source: Durham Tech

**Durham Tech EMT-Paramedic Students Have a 100% Pass Rate**

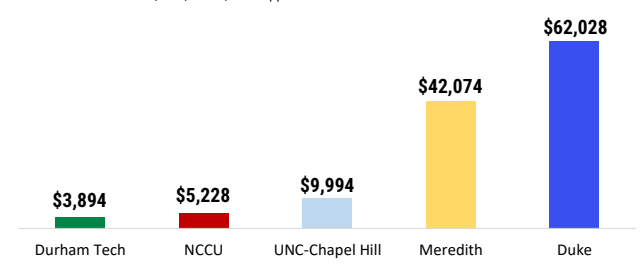
Durham Tech licensure first-time pass rates (2021)



Source: Durham Tech

**Durham Tech is the Least Expensive Local Option**

Combined cost of tuition, fees, books, and supplies



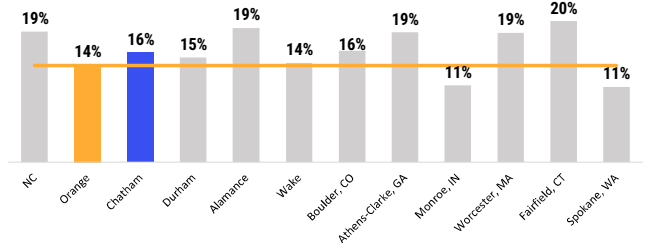
Source: Durham Tech

# Health Indicators



## Adult Smoking

RWJF: Percentage of adults who are current smokers

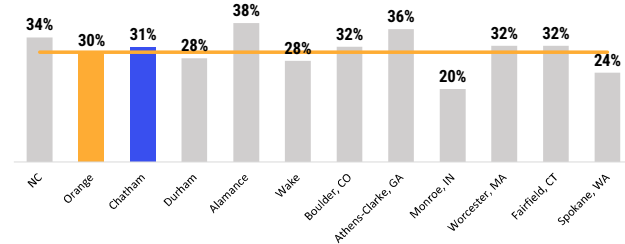


Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2022 Robert Wood Johnson Foundation Health Rankings (2019 source data)

## Adults with Obesity

2022 RWJF: Percentage of the adult population (age 20+) that reports a body mass index (BMI)  $\geq 30$  kg/m<sup>2</sup>

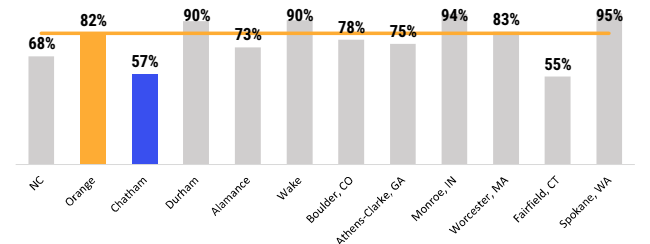


Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2022 Robert Wood Johnson Foundation Health Rankings (2019 source data)

## Access to Exercise Opportunities

2022 RWJF: Percentage of population with adequate access to locations for physical activity

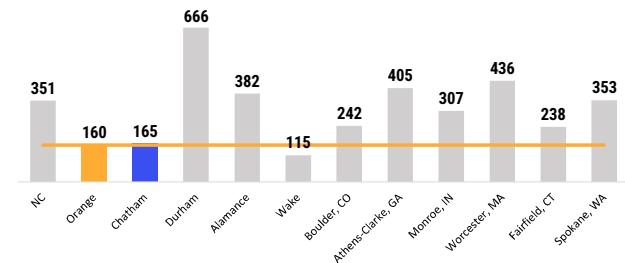


Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2022 Robert Wood Johnson Foundation Health Rankings (2021 source data)

## Violent Crime per 100,000 Residents

2022 RWJF: Number of violent crime offenses per 100,000 population

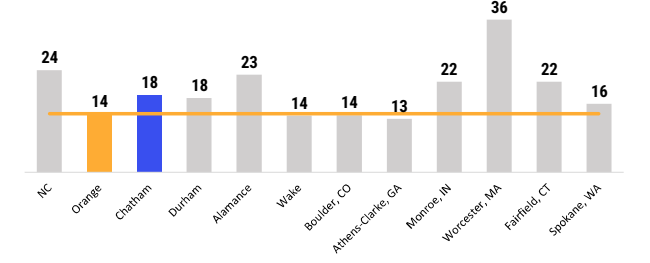


Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2022 Robert Wood Johnson Foundation Health Rankings (2014 and 2016 source data)

## Drug Overdose Deaths

2022 RWJF: Number of drug poisoning deaths per 100,000 population

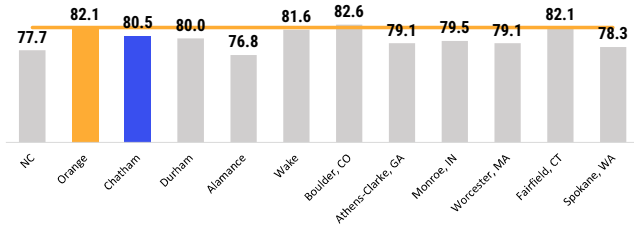


Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2022 Robert Wood Johnson Foundation Health Rankings (2018-2020 source data)

### Life Expectancy

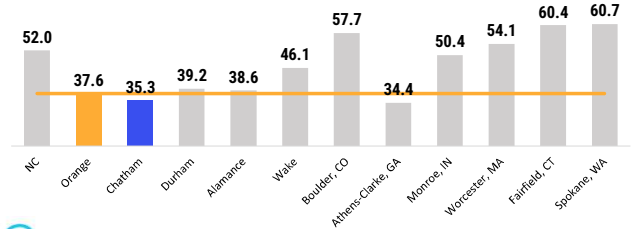
2022 RWJF: Average number of years a person can expect to live



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: 2022 Robert Wood Johnson Foundation Health Rankings (2018-2020 source data)

### Black/White Residential Segregation

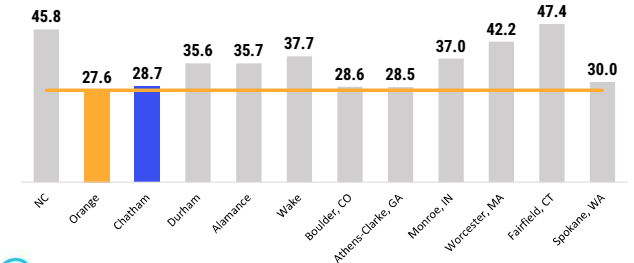
2022 RWJF: Index of dissimilarity where higher values indicate greater residential segregation between Black and White county residents.



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: 2022 Robert Wood Johnson Foundation Health Rankings (2016-2020 source data)

### Non-White/White Residential Segregation

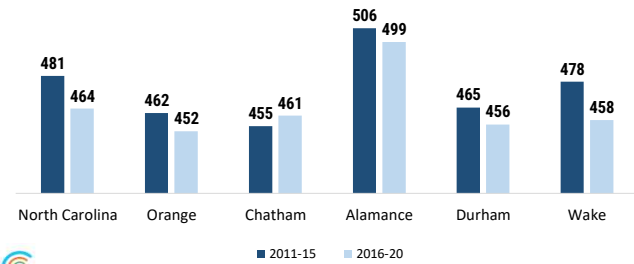
2022 RWJF: Index of dissimilarity where higher values indicate greater residential segregation between non-White and White county residents.



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: 2022 Robert Wood Johnson Foundation Health Rankings (2016-2020 source data)

### 'All Cancer' Rate Up in Chatham; Down in NC, Orange, Alamance, Durham, Wake

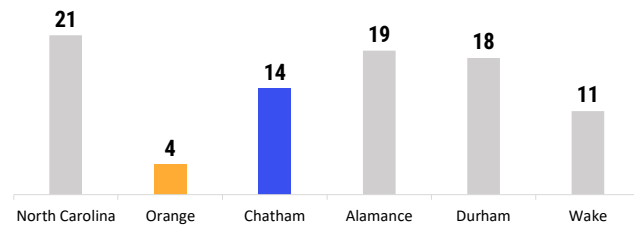
All cancer rate per 100,000 (2011-2015 vs. 2016-2020)



Source: NC State Center for Health Statistics

### Orange County Records Lowest Teenage Birth Rate, One Fifth the NC Rate

2022 RWJF: Number of births per 1,000 females ages 15-19



Source: 2022 Robert Wood Johnson Foundation Health Rankings (2014-2020 source data)

### Orange Ranks First in North Carolina in Clinical Care and in Social/Economic Factors, 2022

County rank, out of the 100 counties in North Carolina

	Orange	Chatham	Durham	Who is #1
Length of Life	2	14	7	Wake
Quality of Life	3	9	8	Wake
Health Behaviors	2	3	9	Wake
Clinical Care	1	9	6	Orange
Social and Economic Factors	1	11	21	Orange
Physical Environment	8	31	41	Onslow

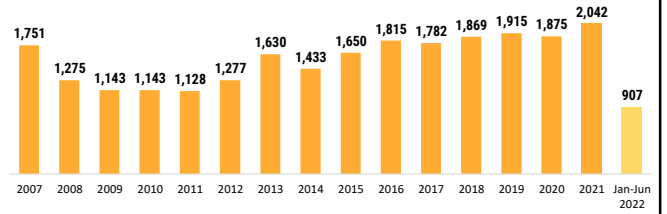
Source: 2022 Robert Wood Johnson Foundation Health Rankings

# Housing (For Sale)



## Orange County Home Sales Rise in 2021

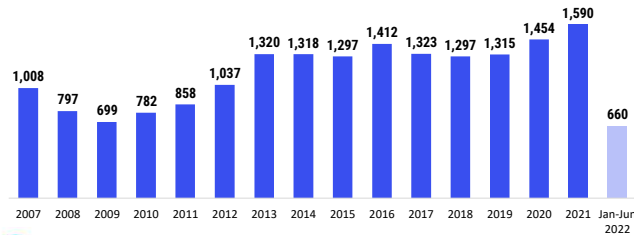
Annual home sales, 2007-June 2022



Source: Triangle MLS and Allen Tate Realtors

## Chatham Home Sales Jump 9% in 2021, on Pace for a Slower 2022

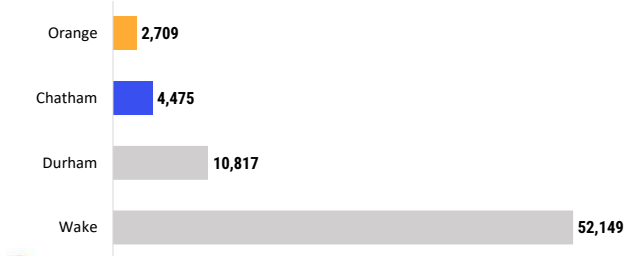
Annual home sales, 2007 - June 2022



Source: Triangle MLS and Allen Tate Realtors

## Since 2010, Orange Adds Fewest New Homes in the Region

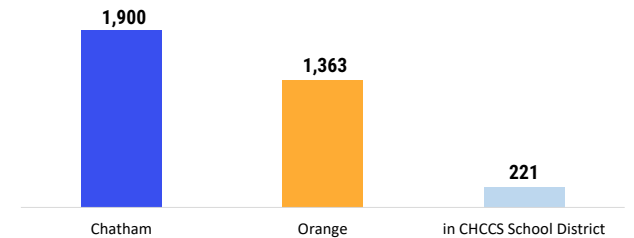
New for-sale housing units built between 2010 and June 2022



Source: Triangle MLS and Allen Tate Realtors

## Chatham Leads in New Construction Sales Since January 2018

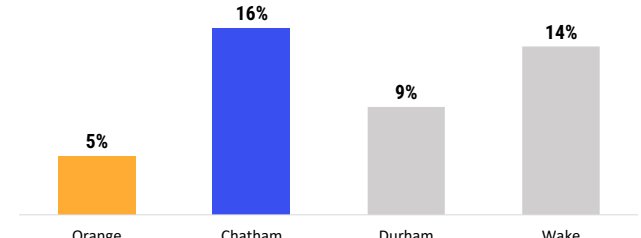
New home construction homes listed and sold from January 2018 through June 2022



Source: Triangle MLS and Allen Tate Realtors

## 5% of Orange County Total Housing Stock Has Been Built Since 2010, 16% in Chatham

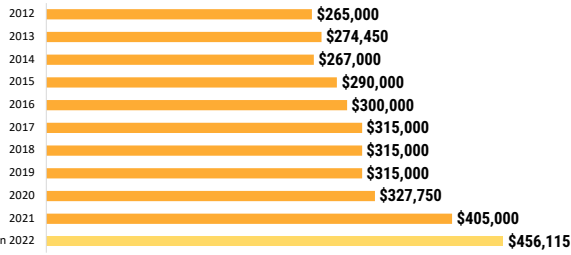
Percent of available housing units built since 2010



Source: Triangle MLS and Allen Tate Realtors

### Orange County Median Home Sales Price Increases by \$140,000 since 2019

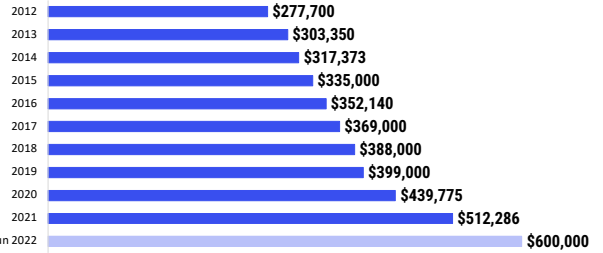
Orange County median home sales price, 2012 through June 2022



Source: Triangle MLS and Allen Tate Realtors

### Chatham County Median Home Sales Price Increases by \$200k Since 2019

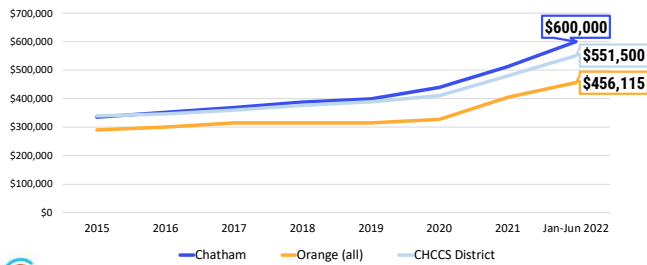
Chatham County median home sales price, 2012 through June 2022



Source: Triangle MLS and Allen Tate Realtors

### Regional Home Prices Grow Sharply Beginning in 2020

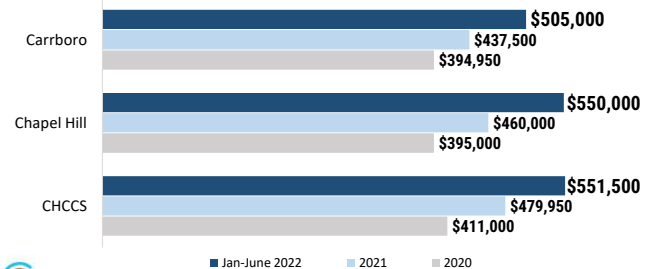
Median residential closing price, 2015 through June 2022



Source: Triangle MLS and Allen Tate Realtors

### Carrboro, Chapel Hill, and CHCCS Homes Top \$500K

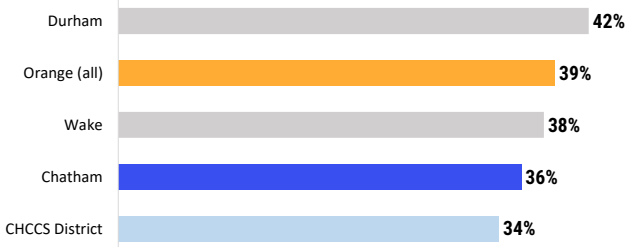
Median home sales price for the years 2020 and 2021 and the period Jan-June 2022



Source: Triangle MLS and Allen Tate Realtors

### 18-Month Home Price Growth Rate Led By Durham (42%)

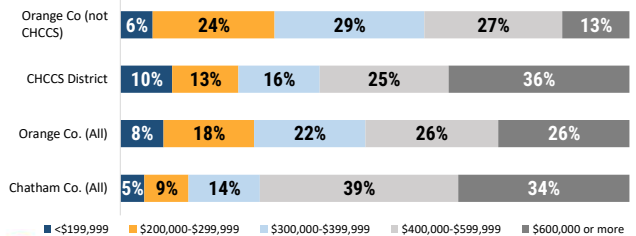
Change in median home sale price, 2020 compared with Jan - June 2022



Source: Triangle MLS and Allen Tate Realtors

### 30% of Orange and 14% of Chatham Homes Sold for Less Than \$300,000 (2021)

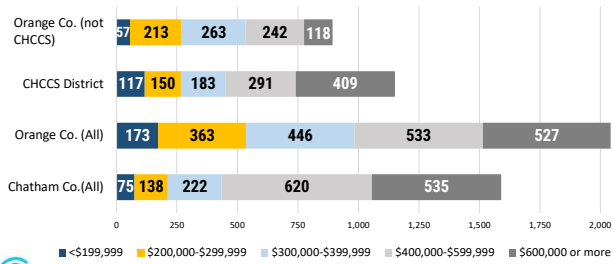
Percent of homes sold in 2021 by price bands



Source: Triangle MLS and Allen Tate Realtors

### 536 Homes in Orange and 213 in Chatham Sold for Less Than \$300,000 (2021)

Number of homes sold in 2021 by price bands



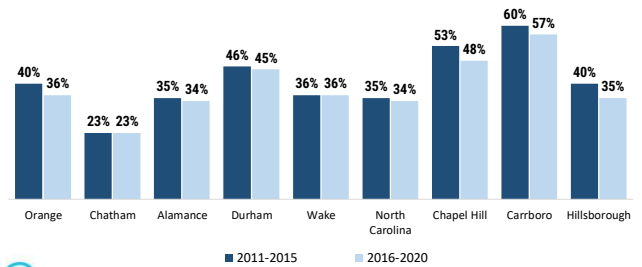
Source: Triangle MLS and Allen Tate Realtors

# Housing (For Rent)

## American Community Survey 2016-2020

### Percent of Local Residents Renting Declined

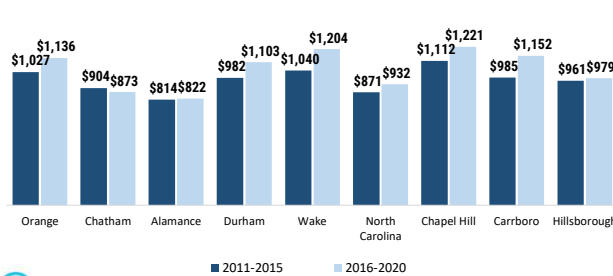
Share of renter-occupied households, 2011-15 vs. 2016-20



Source: American Community Survey 5-Year Estimates, 2011-15 & 2016-20

### Median Rent Up in Most Places Except Chatham

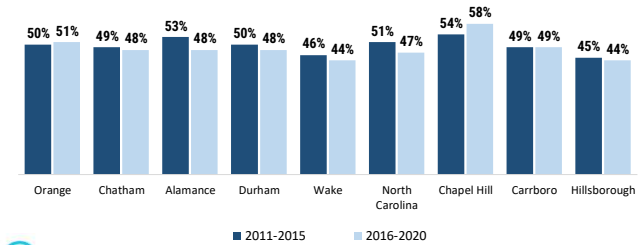
Median rent, 2011-15 vs. 2016-20



Source: American Community Survey 5-Year Estimates, 2011-15 & 2016-20

### Cost-Burdened Renters Up in Orange Communities, Declining Elsewhere

Percent of 'cost-burdened' households (spending greater than 30% of household income on rent) 2011-15 vs. 2016-20



Source: American Community Survey 5-Year Estimates, 2011-15 & 2016-20

### 2021 Local and NC Fair Market Rent

Fair Market Rent (FMR): FMR is HUD's best estimate of what a household seeking a modest rental home in a short amount of time can expect to pay for rent and utilities in the current market

	North Carolina	Durham-Chapel Hill HMFA (Orange, Durham, Chatham, & Person Counties)	Raleigh-Cary HMFA (Franklin, Johnston, and Wake Counties)	Alamance HMFA (Alamance County)
Zero Bedroom	\$817	\$1,024	\$1,038	\$619
One Bedroom	\$847	\$1,030	\$1,073	\$698
Two Bedroom	\$997	\$1,199	\$1,223	\$891
Three Bedroom	\$1,304	\$1,546	\$1,517	\$1,126
Four Bedroom	\$1,606	\$1,812	\$1,982	\$1,208

Source: National Low Income Housing Coalition, Out of Reach Report 2021

### Orange County 2021 Housing Wage is \$19.81 (1-Bed Apt) (Was \$18.73 in 2020 & \$17.35 in 2019)

Housing wage: hourly wages needed to afford Fair Market Rent, 2021

	North Carolina	Durham-Chapel Hill HMFA (Orange, Durham, Chatham, & Person Counties)	Raleigh-Cary HMFA (Franklin, Johnston, and Wake Counties)	Alamance HMFA (Alamance County)
Zero Bedroom	\$15.72	\$18.69	\$19.96	\$11.90
One Bedroom	\$16.28	\$19.81	\$20.63	\$13.42
Two Bedroom	\$19.18	\$23.06	\$23.52	\$17.13
Three Bedroom	\$25.07	\$29.73	\$29.17	\$21.65
Four Bedroom	\$30.89	\$34.85	\$38.12	\$23.23

Source: National Low Income Housing Coalition, Out of Reach Report 2021

### \$47,960/yr Needed to Afford 2-Bedroom Fair Market Rent (Was \$45,360 in 2020 and \$42,200 in 2019)

Annual salary needed to afford Fair Market Rent, 2021

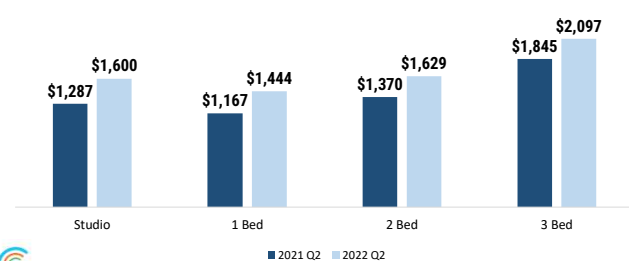
	North Carolina	Durham-Chapel Hill HMFA (Orange, Durham, Chatham, & Person Counties)	Raleigh-Cary HMFA (Franklin, Johnston, and Wake Counties)	Alamance HMFA (Alamance County)
Zero Bedroom	\$32,689	\$40,960	\$41,520	\$24,760
One Bedroom	\$33,863	\$41,200	\$42,920	\$27,920
Two Bedroom	\$39,897	\$47,960	\$48,920	\$35,640
Three Bedroom	\$52,148	\$61,840	\$60,680	\$45,040
Four Bedroom	\$64,252	\$72,480	\$79,280	\$48,320

Source: National Low Income Housing Coalition, Out of Reach Report 2021

## Local Rental Data Current to June 2022

### Average 2-Bedroom Rent Up 19% and Average 1-Bedroom Rent Up 24% in Since June 2021

Chapel Hill-Carrboro multifamily average asking rent Q2 2021 compared to Q2 2022



Source: Eller Capital

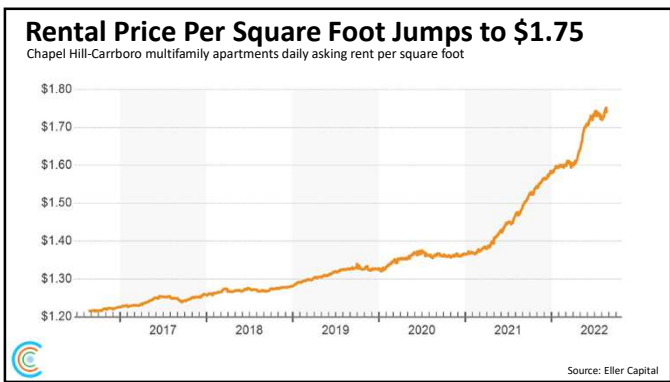
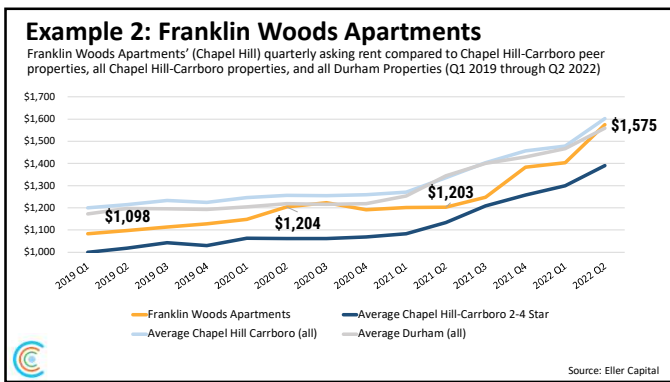
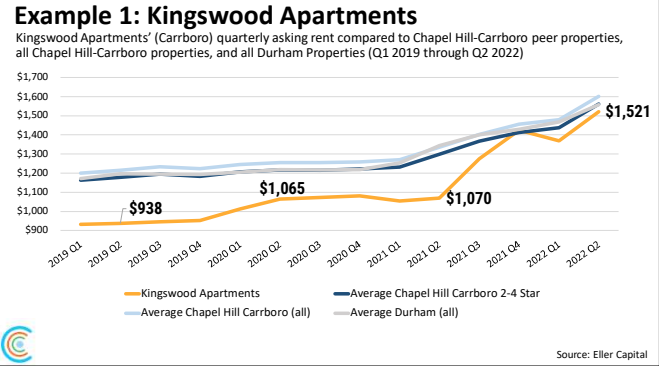
### Chapel Hill and Carrboro's 11,728 Multifamily Units by Star Rating, Units, Vacancy, and Rent

Q2 2022

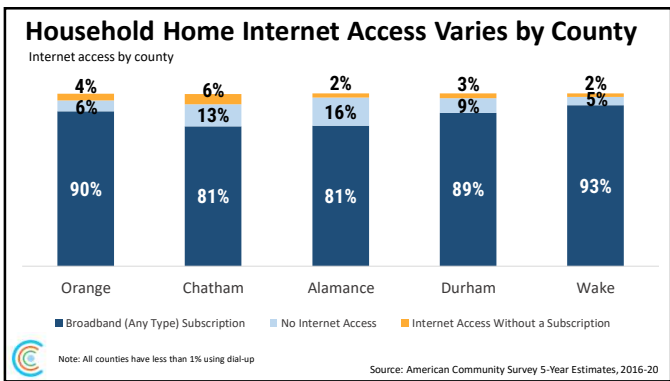
	Units	Vacancy Rate	Asking Rent
4 & 5 Star	4,164	11.80%	\$1,971
3 Star	6,151	7.10%	\$1,423
1 & 2 Star	1,413	3.70%	\$1,312
<b>Total</b>	<b>11,728</b>	<b>8.30%</b>	<b>\$1,609</b>

Source: Eller Capital

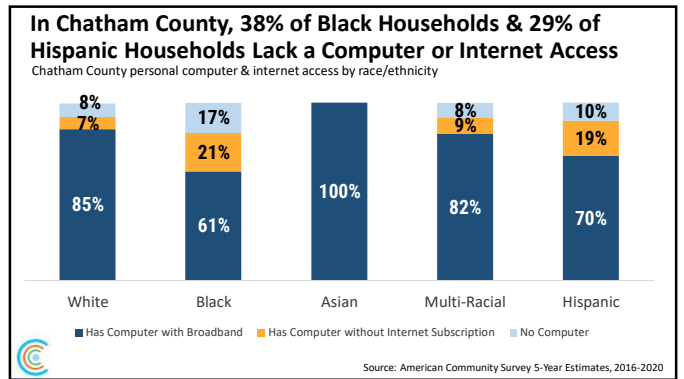
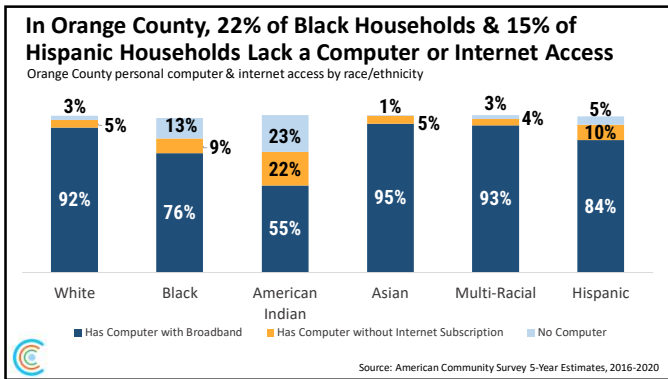
# Two Local Examples



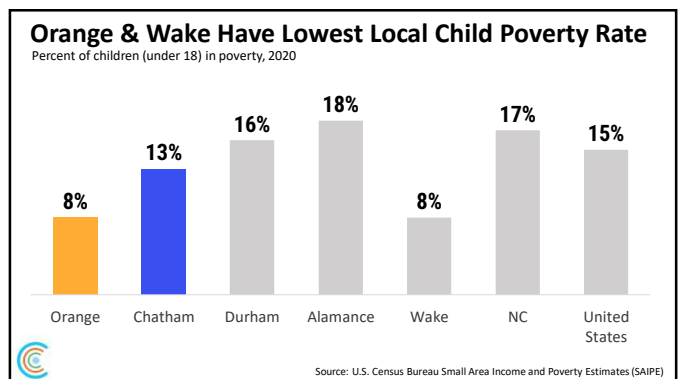
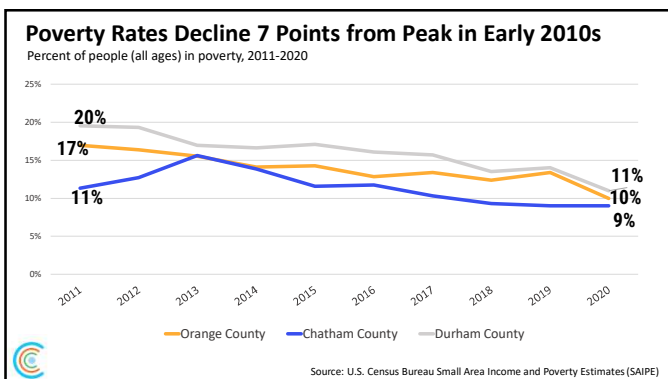
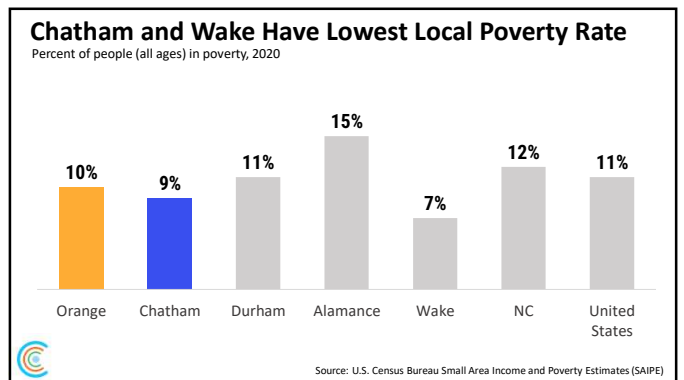
# Internet Access

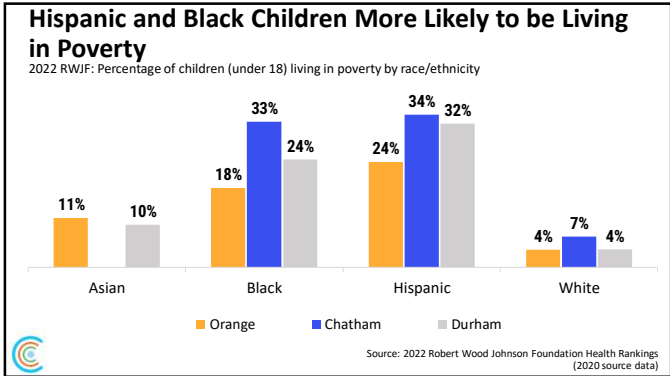
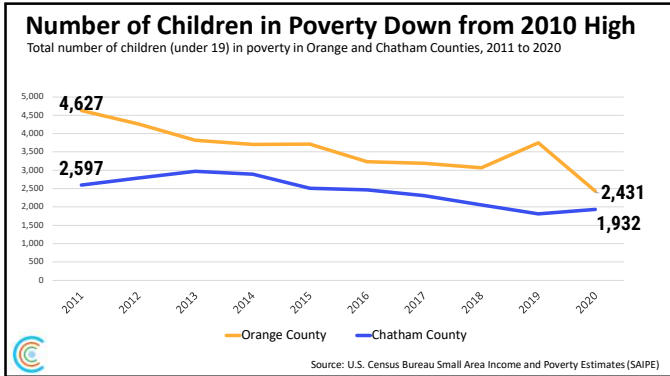




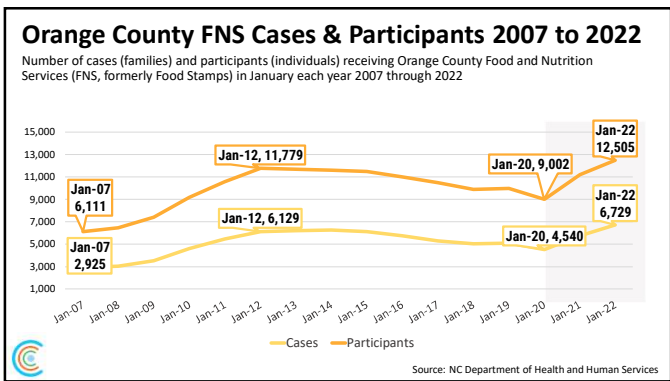
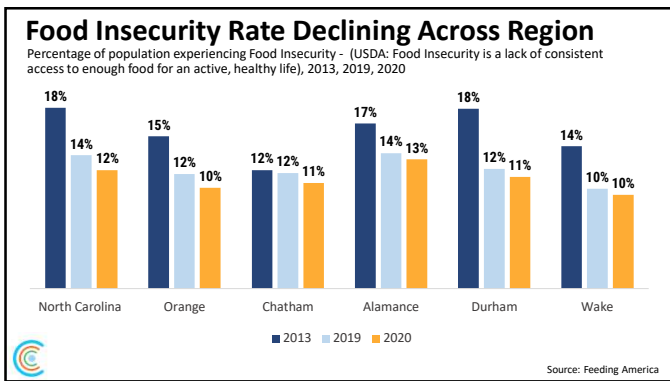
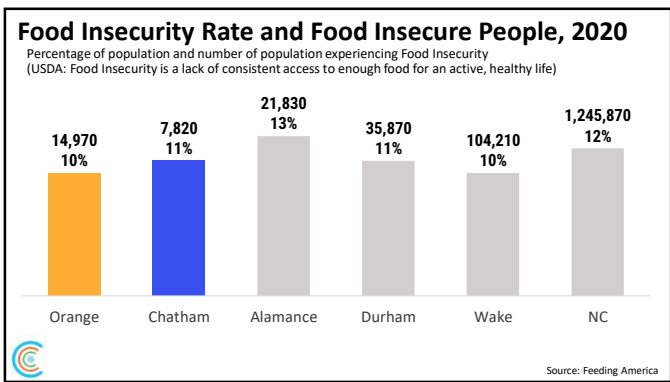


# Poverty





# Food Insecurity

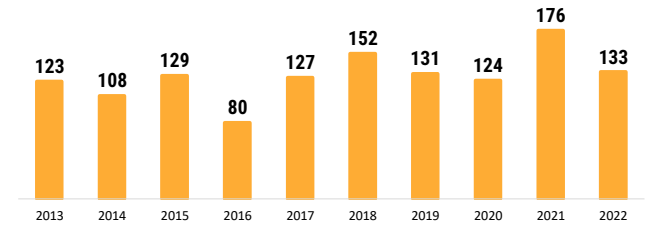


# Homelessness



## Number of Individuals Experiencing Homelessness Drops in 2022

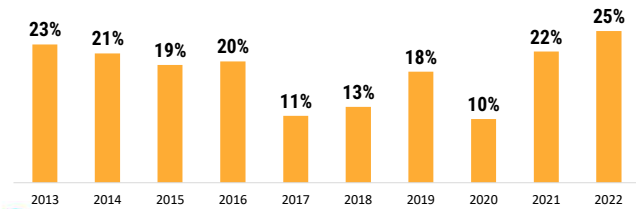
Orange County Annual Point in Time Count, 2013 - 2022



Source: Orange County Partnership to End Homelessness

## Share of Orange County Homeless who are Chronically Homeless Rises to 25%

Chronic homelessness is defined as an individual with a disabling condition who has experienced homelessness for longer than a year (during which time the individual may have lived in a shelter, or a place not meant for human habitation)



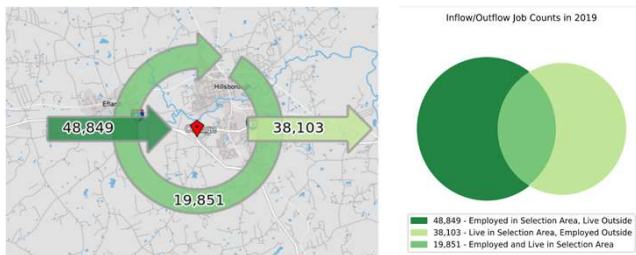
Source: Orange County Partnership to End Homelessness

# Commuting (Worker Inflow, Outflow)



## Orange County Worker Inflows/Outflows, 2019

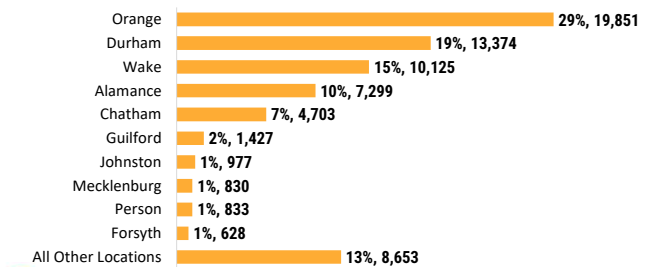
48,849 drive in, 38,103 drive out, and 19,851 live and work in Orange County



Source: U.S. Census Bureau LODES (OnTheMap)

## 71% of the People Who Work in Orange Commute In

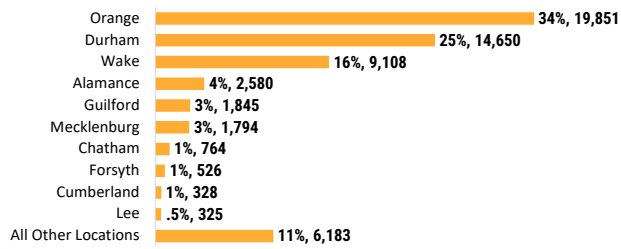
The 68,700 people who work in Orange County by county of residence, 2019



Source: U.S. Census Bureau LODES (OnTheMap)

### 66% of Orange County Working Residents Work Outside of Orange County

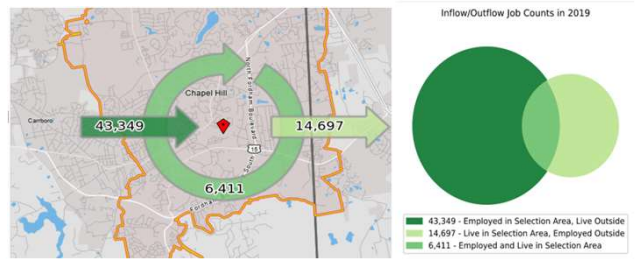
Location of primary job for Orange County's 59,954 Working Residents, 2019



Source: U.S. Census Bureau LODES (OnTheMap)

### Chapel Hill Worker Inflows/Outflows, 2019

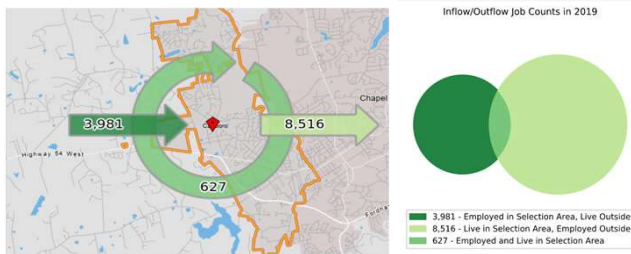
43,349 drive in, 14,697 drive out, and 6,411 live and work in Chapel Hill



Source: U.S. Census Bureau LODES (OnTheMap)

### Carrboro Worker Inflows/Outflows, 2019

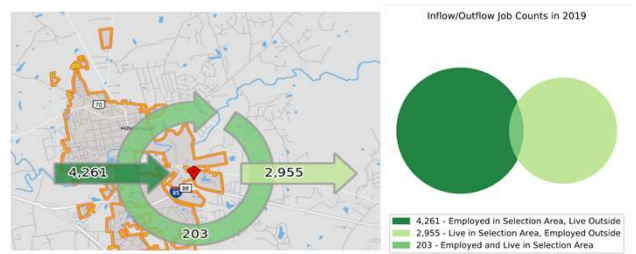
3,981 drive in, 8,516 drive out, and 627 live and work in Carrboro



Source: U.S. Census Bureau LODES (OnTheMap)

### Hillsborough Worker Inflows/Outflows, 2019

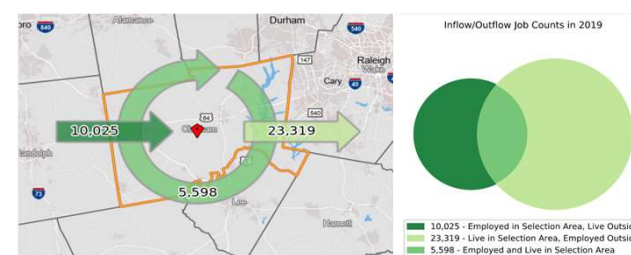
4,261 drive in, 2,995 drive out, and 203 live and work in Hillsborough



Source: U.S. Census Bureau LODES (OnTheMap)

### Chatham County Worker Inflows/Outflows, 2019

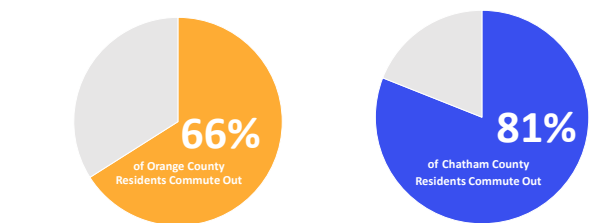
10,025 drive in, 23,319 drive out, and 5,598 live and work in Chatham



Source: U.S. Census Bureau LODES (OnTheMap)

### Majority of Orange and Chatham Residents Work Outside the County In Which They Live

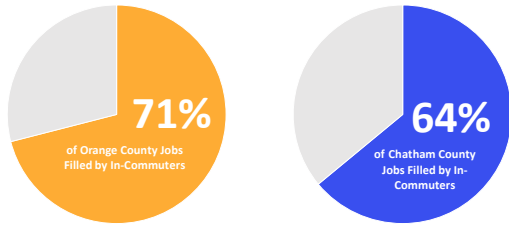
Percent of residents commuting outside of the county for work, 2019



Source: U.S. Census Bureau LODES (OnTheMap)

### Most Orange and Chatham County Jobs Filled by In-Commuters

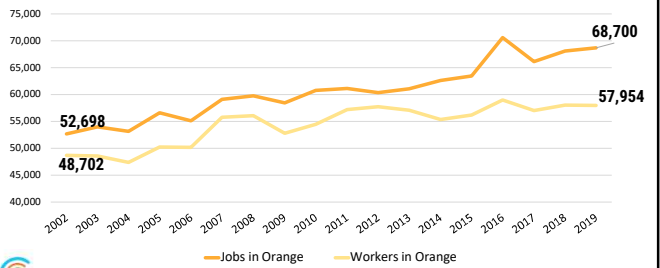
Percent of county jobs filled by in-commuters, 2019



Source: U.S. Census Bureau LODES (OnTheMap)

### Orange County has 10,500 More Jobs than Workers

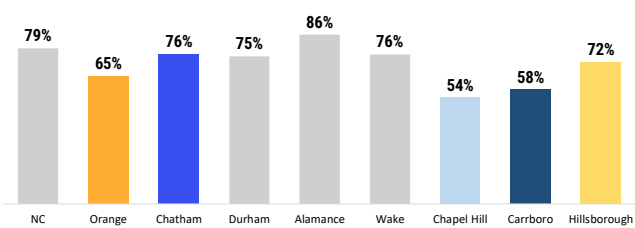
Jobs in Orange County compared with workers living in Orange County from 2002 to 2019



Source: U.S. Census Bureau LODES (OnTheMap)

### Chapel Hill Workers Least Likely to Drive Alone to Work

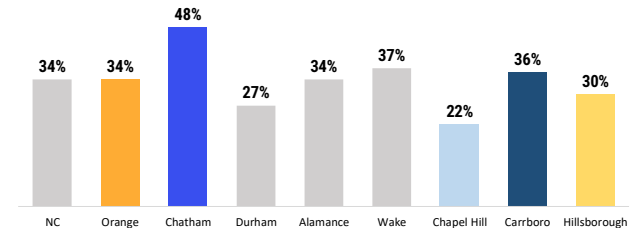
Percent of workers aged 16 and over driving to work alone, 2016-20



Source: American Community Survey 5-Year Estimates, 2016-20

### 48% of Chatham Workers Driving Alone Travel 30+ Minutes

Percent of workers that drive alone and have a 30+ min commute, 2016-20

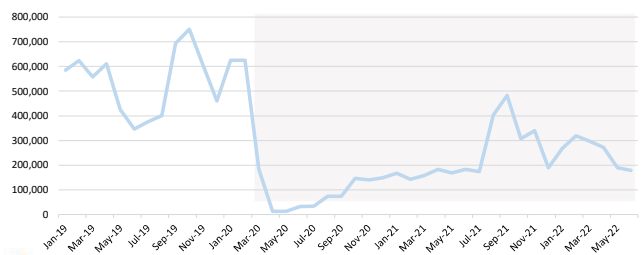


Source: American Community Survey 5-Year Estimates, 2016-20

# Transit

### Pandemic Restrictions, University Operations, and Changing Work Habits Have Big Impact on CHT Ridership

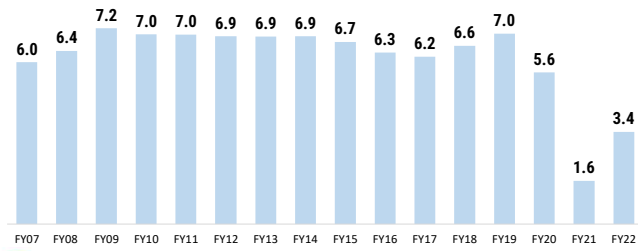
Monthly Chapel Hill Transit ridership January 2019 through June 2022



Source: Chapel Hill Transit

### Chapel Hill Transit Ridership Rebounds, But Well Below 2019 Peak

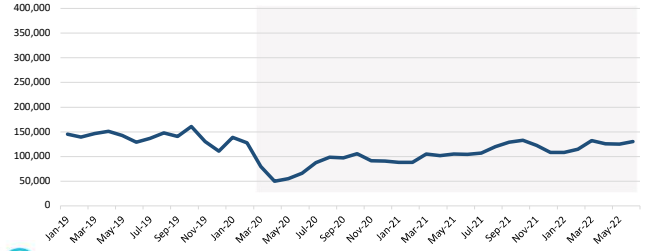
Annual Chapel Hill Transit ridership from FY2007 to FY2022 (in millions)



Source: Chapel Hill Transit

### Pandemic Restrictions and Changing Work Habits Have Big Impact on GoTriangle Ridership

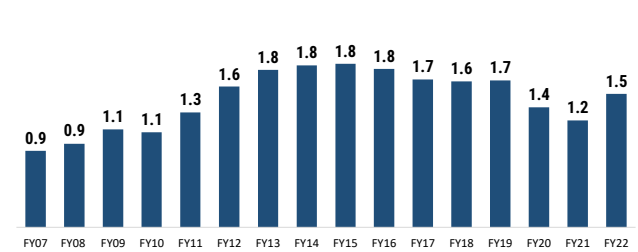
Monthly GoTriangle ridership January 2019 through June 2022



Source: GoTriangle

### 2022 GoTriangle Ridership Approaches Pre-Pandemic Levels

Annual GoTriangle Ridership from FY2007 to FY2022 (in millions)

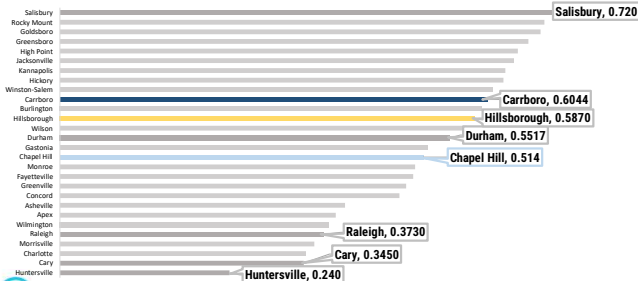


Source: GoTriangle

# Property Taxes

### North Carolina Municipal Tax Rates Vary Widely

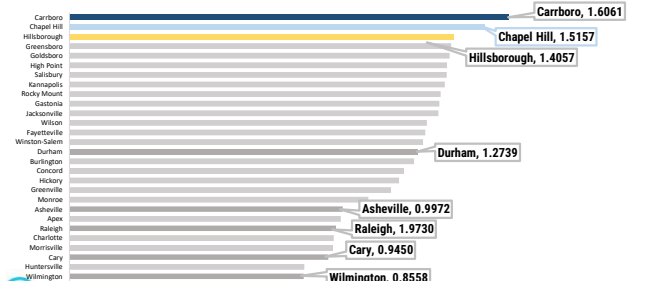
Municipal property tax rates, FY2021-22



Source: NC Department of Revenue

### Local Jurisdictions Have Highest Combined Property Tax Rate

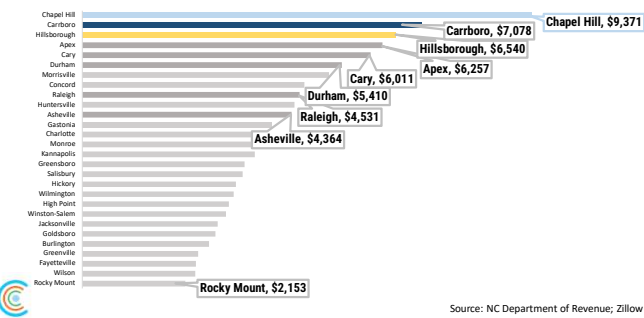
Combined jurisdictions property tax rates (municipal + county + school tax rates), FY2021-22



Source: NC Department of Revenue

### Chapel Hill Has Highest Average Residential Property Tax Bill

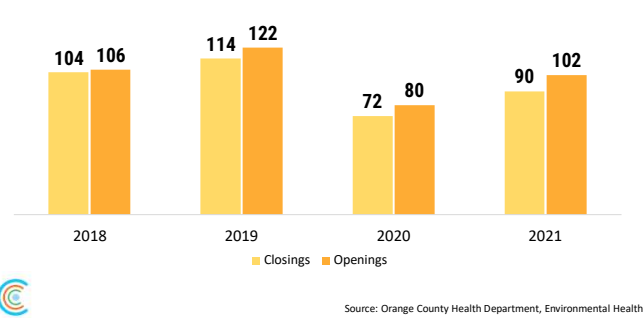
Combined local property tax rates (FY 2021-22) assessed on local median home value, June 2022



# Restaurants

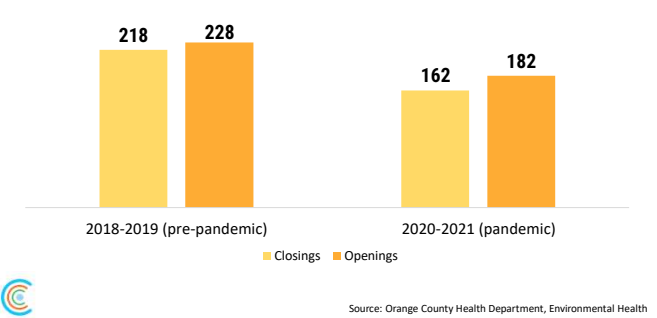
### More Restaurants Open Than Close in Pandemic

Orange County restaurant and food service establishments openings & closings, 2018-2021



### Both Restaurant Openings and Closings Decline in Pandemic

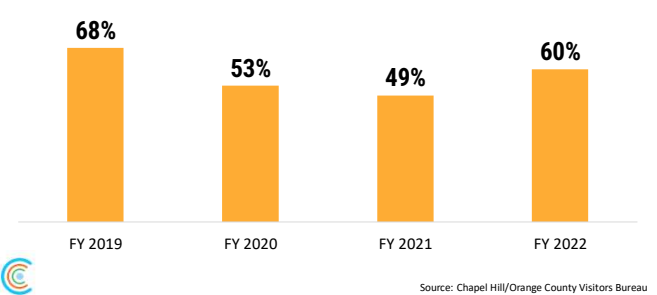
Orange County restaurant and food service establishments openings & closings, 2018-19 vs. 2020-21



# Orange County Hotels

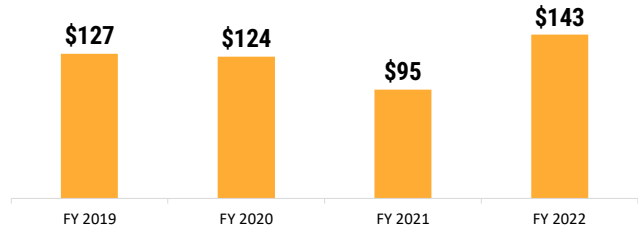
### Orange County Hotels Average Daily Occupancy Rebounds from Pandemic Lows

Average daily hotel occupancy rate, FY2019 through FY2022



### Orange County Hotel Average Daily Rate Rebounds in 2022 From 2021 Low

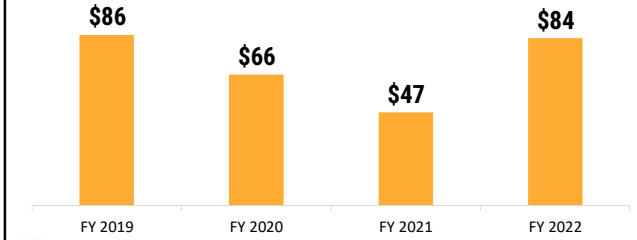
County average daily hotel room rate, FY2019-FY2022



Source: Chapel Hill/Orange County Visitors Bureau

### Orange County RevPAR Returns to 2019 Levels

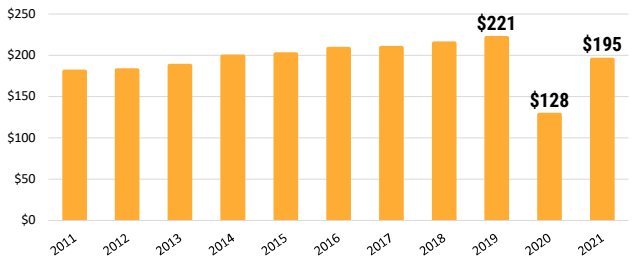
County average revenue per available room (RevPAR), FY2019-FY2022



Source: Chapel Hill/Orange County Visitors Bureau

### Orange County Visitor Expenditures Rebound in 2021

2011-2021; domestic visitor spending (\$millions), adjusted for inflation, \$2021

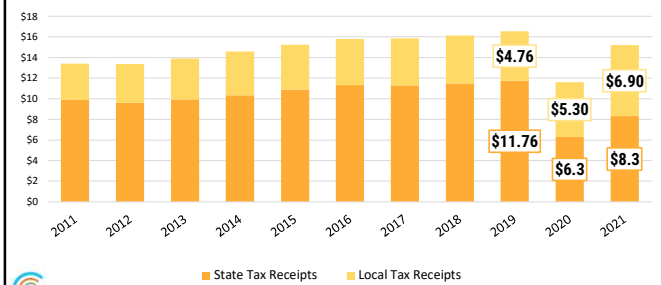


Note: In 2020 the reporting was expanded from domestic visitors to include international visitors

Source: Visit North Carolina

### Orange County Revenues from Tourism (in millions)

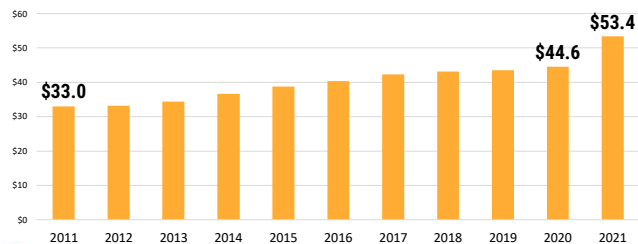
FY2011 to FY2021; adjusted for inflation, \$2021



Source: Visit North Carolina

### Orange County Tourism Labor Income Shows Continued Strong Growth

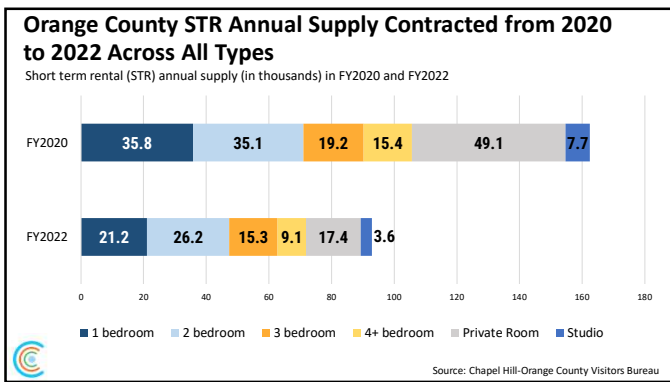
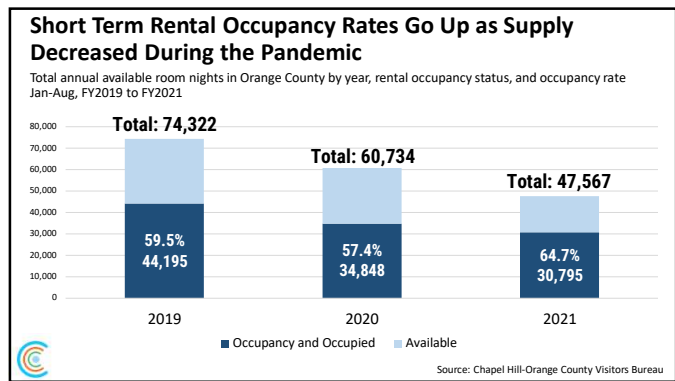
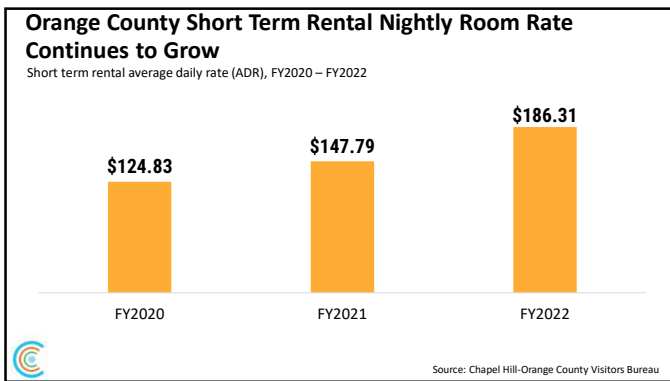
(in millions), adjusted for inflation \$2021



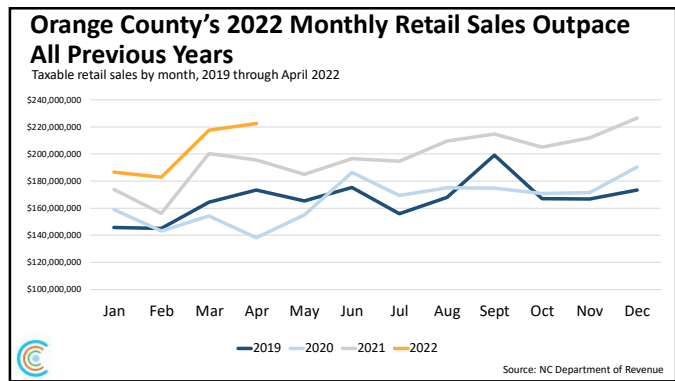
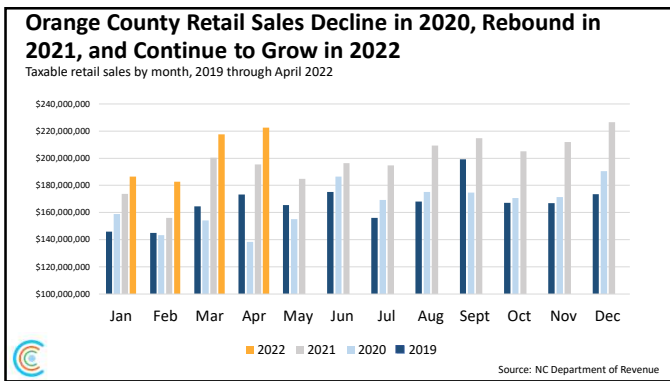
Source: Visit North Carolina

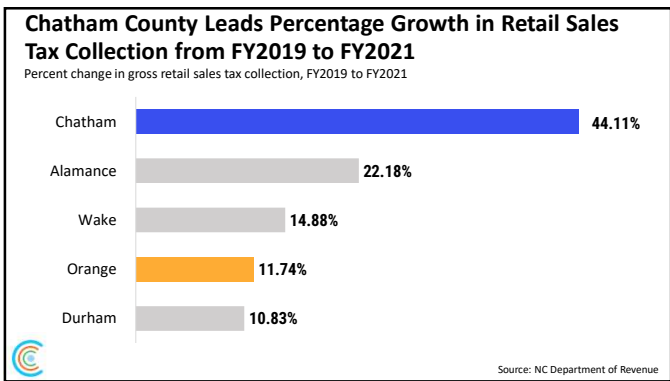
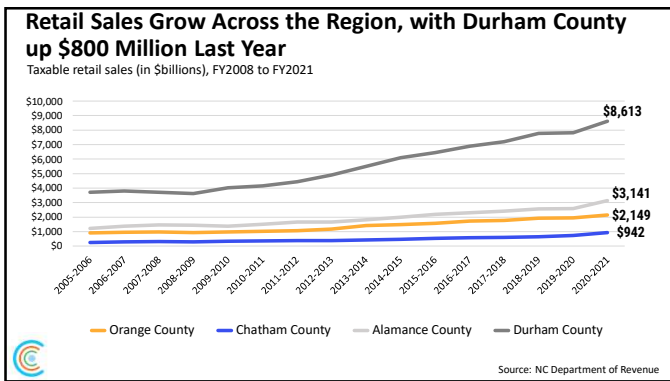
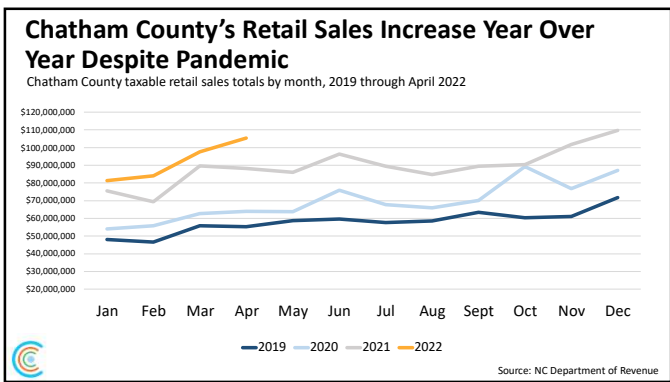
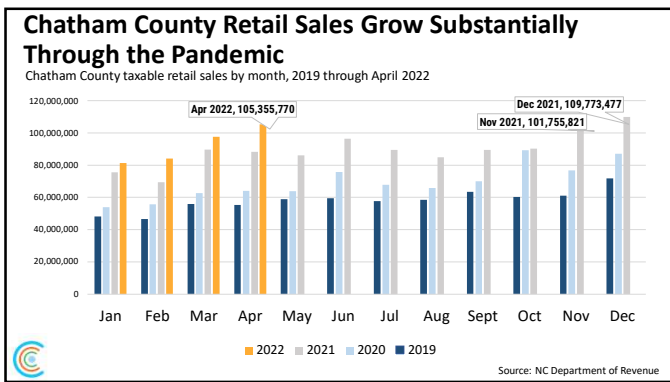
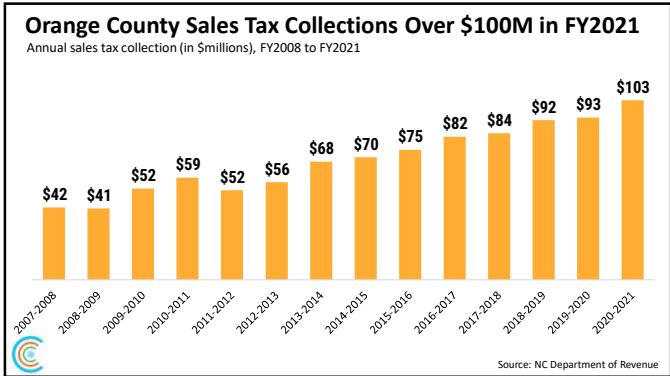
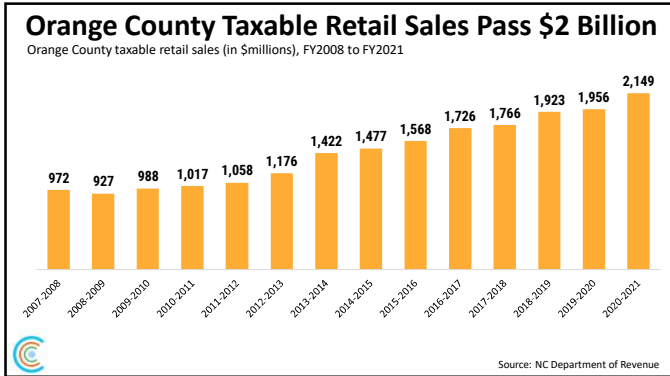
## Short Term Rentals (STRs)





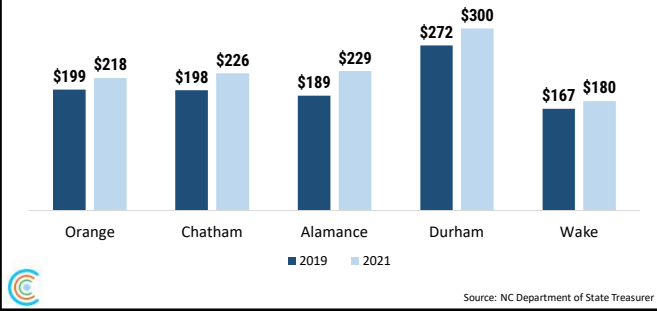
# Retail Sales and Sales Tax Revenue





### Sales Tax Per Capita Grows Across the Region

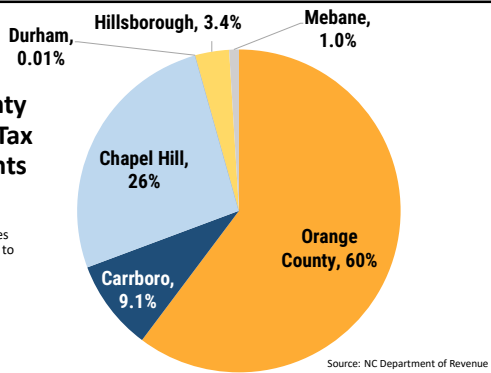
Sales tax revenue per capita FY2019 vs. FY2021



### Sales Tax Disbursements

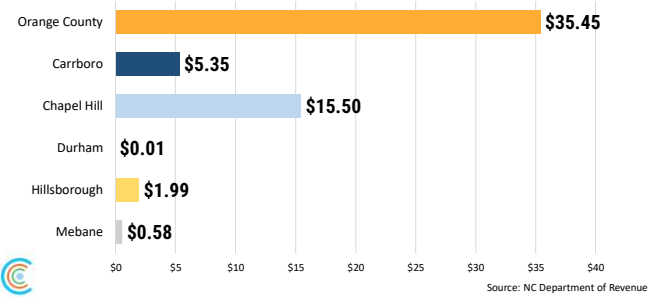
### Orange County Sales & Use Tax Disbursements

How Orange County's Sales and Use Tax is distributed to the county and among its municipalities. FY2021



### Orange County Sales and Use Tax Disbursements (\$millions)

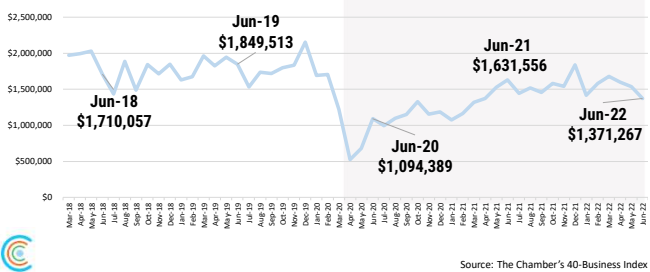
FY2021 sales and use tax disbursements (\$millions) (Articles 39, 40, 42, 43, 44, 45 and 46 sales)



### Chamber Small Business Index

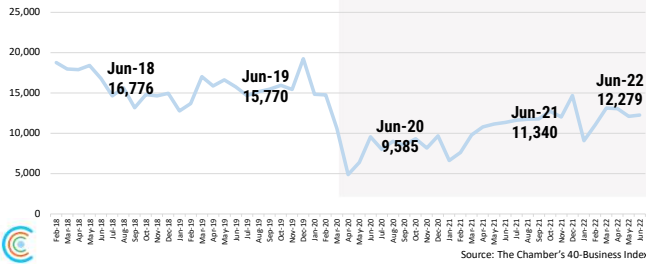
### Chamber Small Business Index Recovers, But Not to Pre-Pandemic Levels

Cohort of 40 diverse local businesses' combined monthly credit card transaction values, Feb 2018 – June 2022



### Chamber Small Business Index Still 3K Card Swipes Behind Pre-Pandemic Monthly Totals

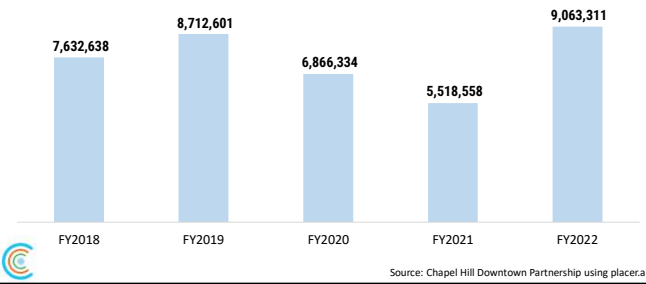
Cohort of 40 diverse local businesses' combined monthly credit card transaction volume, Feb 2018 – June 2022



## Downtown Chapel Hill Pedestrian Activity

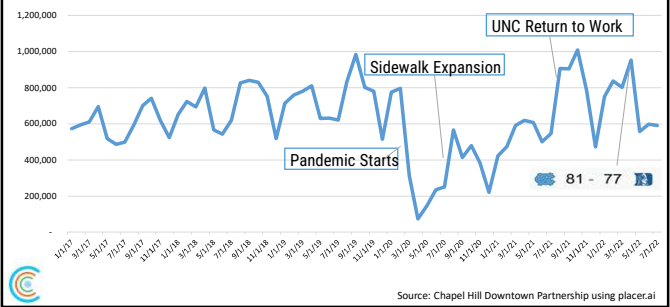
### 9 Million Pedestrians in Downtown Chapel Hill in FY2022 Marks a 5-Year High

Downtown Chapel Hill annual pedestrian counts FY2018 through FY2022



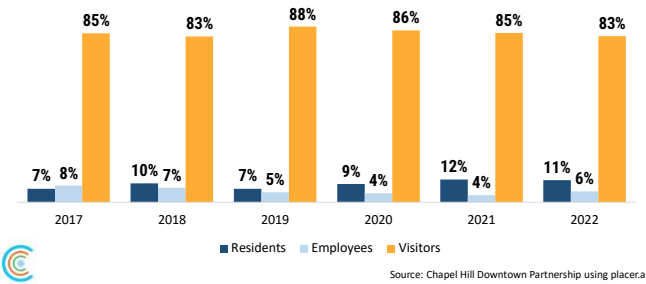
### Monthly Downtown Chapel Hill Pedestrian Traffic

From January 2017 to July 2022



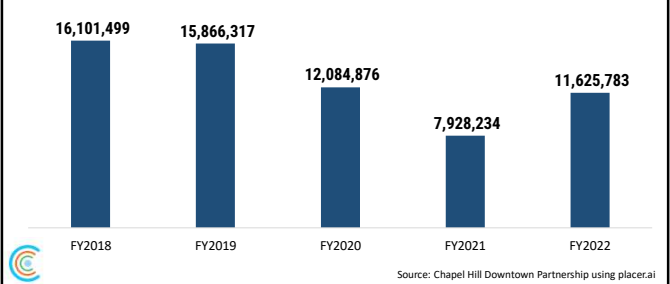
### Visitors Represent More than 83% of Downtown Pedestrians

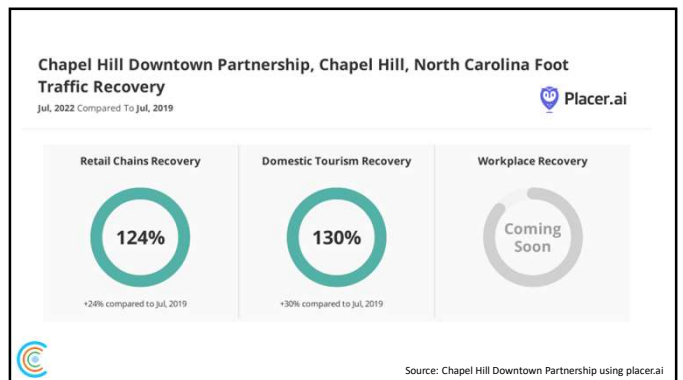
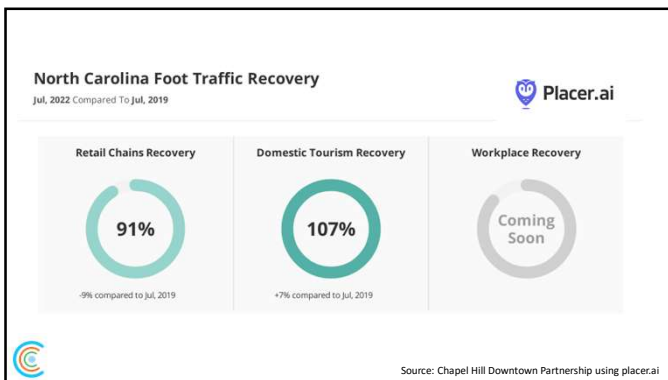
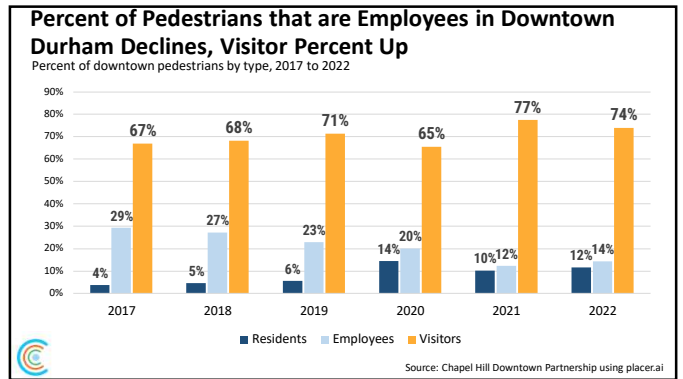
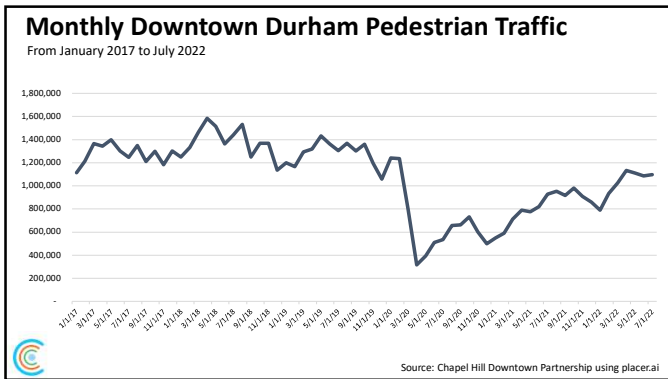
Downtown pedestrians by type, 2017 to 2022



### Downtown Durham Pedestrian Traffic Rebounds, But Well Below Pre-Pandemic Levels

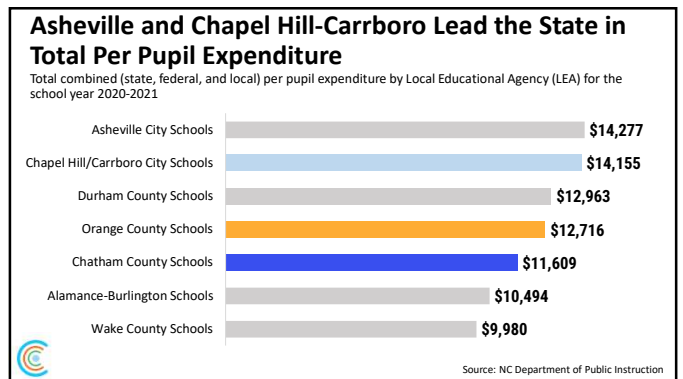
Downtown Durham pedestrian traffic from FY2018 to FY2022





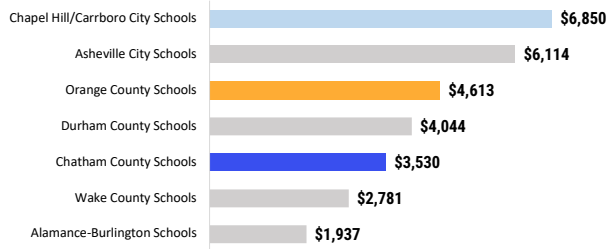
# Public Schools

Source: NC Department of Public Instruction



### CHCCS Leads in Local Per Pupil Expenditure

Local per pupil expenditure by Local Educational Agency (LEA) for the school year 2020-21

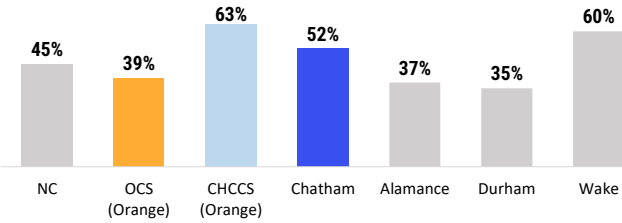


Source: NC Department of Public Instruction

## 3<sup>rd</sup> Grade Reading

### CHCCS & Wake Outperform Neighbors on 3rd Grade Reading End of Grade (EOG), SY2021

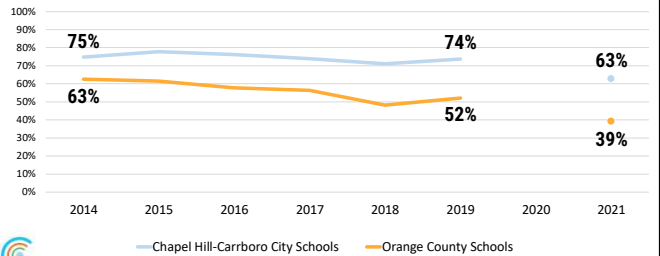
Percent of students "Grade Level Proficient" (level 3+)



Source: NC Department of Public Instruction

### Reading on Grade Level (Grade 3) Drops Sharply in Pandemic; Down 11 Pts in CHCCS and 13 Pts in OCS

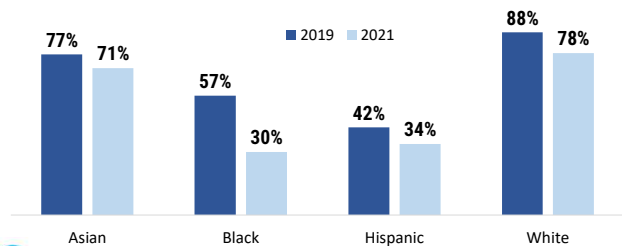
Percent of students Grade Level Proficient (level 3+) in End-of-Grade (EOG) Reading Grade 3, SY2014 to SY2021. No EOG tests were taken in 2020.



Source: NC Department of Public Instruction

### Percent of CHCCS 3<sup>rd</sup> Graders Reading on Grade Level Declines in Pandemic, Substantial Racial Disparities Persist

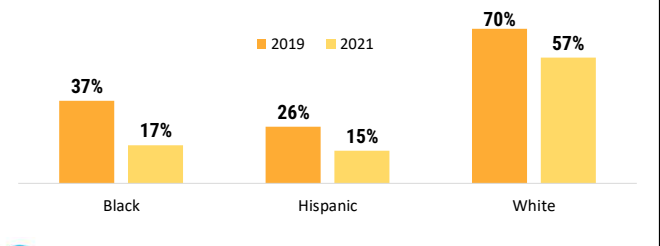
Percent of CHCCS students scoring "Grade Level Proficient" on 3<sup>rd</sup> Grade Reading EOG by race, 2021



Source: NC Department of Public Instruction

### Percent of OCS 3<sup>rd</sup> Graders Reading on Grade Level Declines in Pandemic, Substantial Racial Disparities Persist

Percent of Orange County Schools students scoring "Grade Level Proficient" on 3<sup>rd</sup> Grade Reading EOG by race, 2021



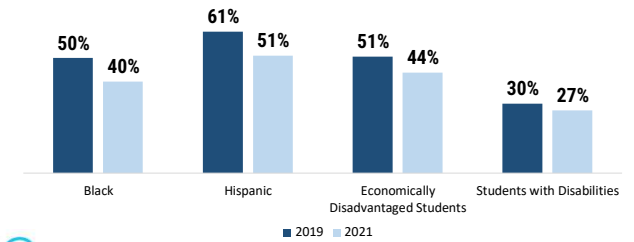
Source: NC Department of Public Instruction

# 8<sup>th</sup> Grade Science



## CHCCS 8<sup>th</sup> Grade Science EOC Performance Declines as Much as 10 Points in Pandemic

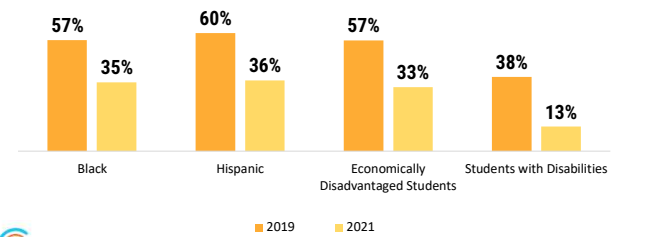
Percent of CHCCS student subgroups scoring "College and Career Ready" (level 4 or 5) Grade 8 Science End of Course (EOC) test, SY2019 vs SY2021



Source: NC Department of Public Instruction

## Orange County Schools 8<sup>th</sup> Grade Science EOC Performance Declines 24 Points in Pandemic

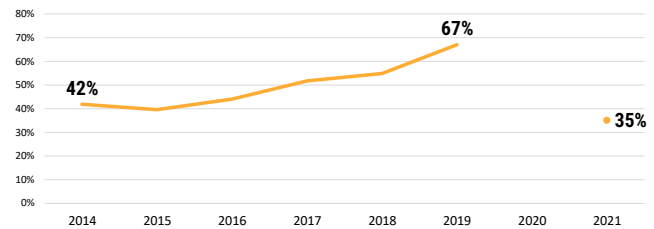
Percent of Orange County Schools student subgroups scoring "College and Career Ready," (level 4 or 5) on Grade 8 science End of Course (EOC) test, SY2019 vs SY2021



Source: NC Department of Public Instruction

## Covid Interrupts Tremendous OCS Progress for 8<sup>th</sup> Grade Science Performance for Black Students

Orange County Schools percentage of Black students "College and Career Ready" (level 4 or 5) on Grade 8 Science EOG, SY2014 to SY2021. No EOG tests taken in 2020.

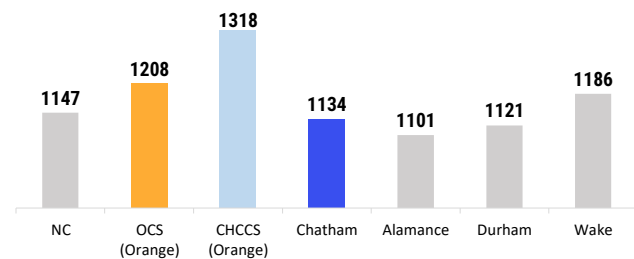


Source: NC Department of Public Instruction

# High School

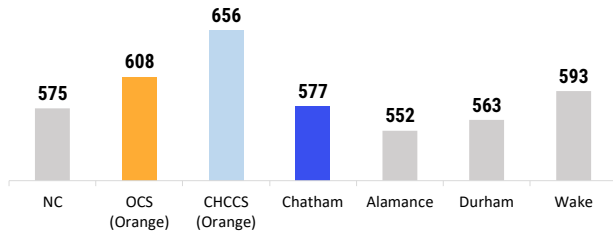


## Average SAT Total Scores (2021)



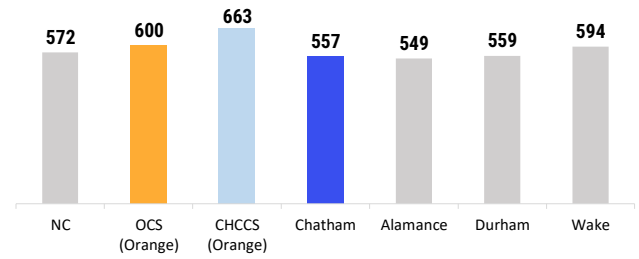
Source: NC Department of Public Instruction

### Average SAT Evidence-Based Reading and Writing (ERW) Scores (2021)



Source: NC Department of Public Instruction

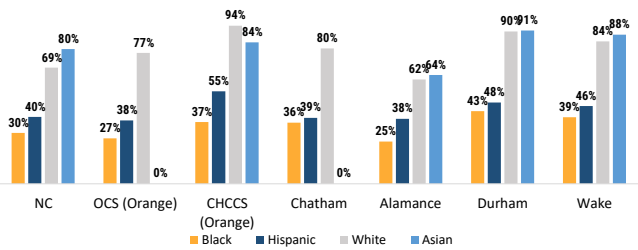
### Average SAT Math Scores (2021)



Source: NC Department of Public Instruction

### Percent of Students Earning UNC-System Eligible ACT Scores (17+)

Percent of students earning an UNC system-eligible ACT composite score (17+) by race, SY2021



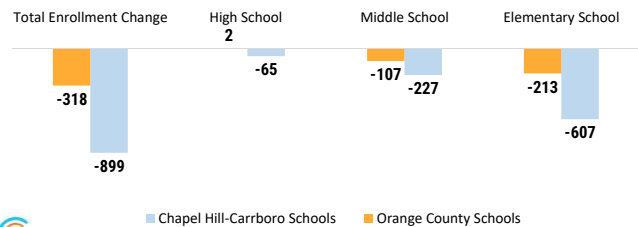
Note: Orange & Chatham County values for Asian students are not reported due to data suppression due to the small number of students in these districts.

Source: NC Department of Public Instruction

# Enrollment

### County-Wide Orange County 2021-22 Student Headcount (ADM) Declines 899 in CSCCH and 318 in OCS from 2019-20

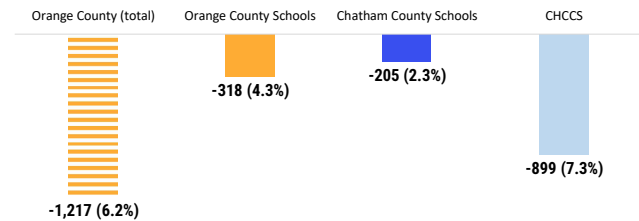
Student increase/decrease in Month 2 Average Daily Members (ADM) SY2020 to SY2022



Source: Principal's Monthly Report

### Student Headcount Declines between 2019-20 to 2021-22 School Years

Student increase/decrease in Month 2 Average Daily Members (ADM) SY2020 to SY2022

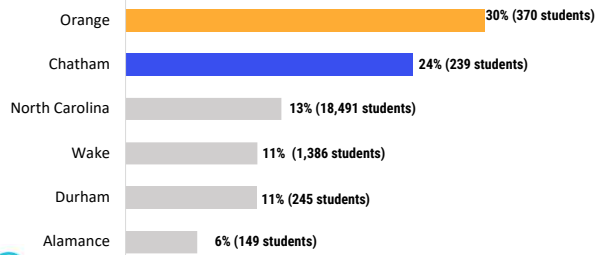


Source: Principal's Monthly Report



### Home School Enrollments Growth Percentage Highest in Orange County vs. Pre-Pandemic SY2019

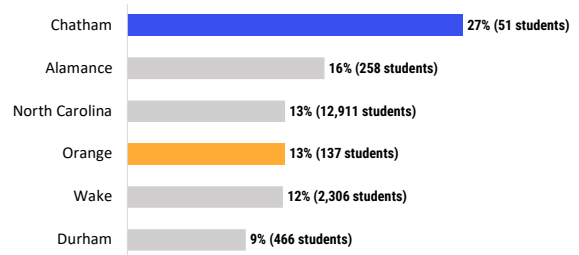
Percent change in home school enrollments by county, SY2018-19 vs SY2021-22



Source: NC Department of Administration

### Private School Enrollments Percentage Change Largest in Chatham

% change in private school enrollments from FY2018-19 vs. SY2021-22

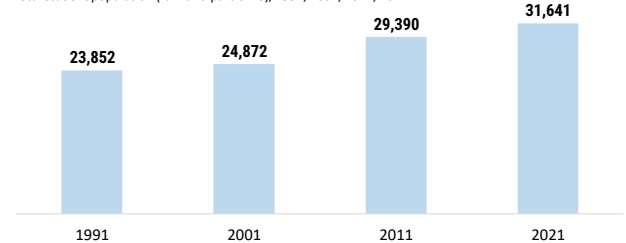


Source: NC Department of Administration

# UNC Chapel Hill

### UNC-Chapel Hill Student Population Increases to 31,641 in 2021

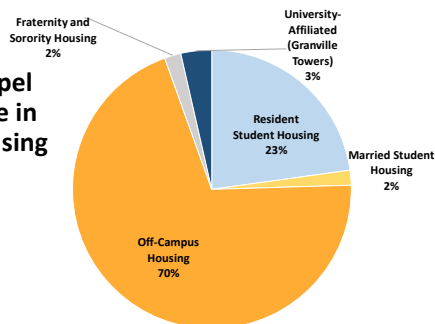
Total student population (full- and part-time), 1991, 2001, 2011, 2021



Source: UNC Office of Institutional Research

### 70% of UNC Chapel Hill Students Live in Off-Campus Housing

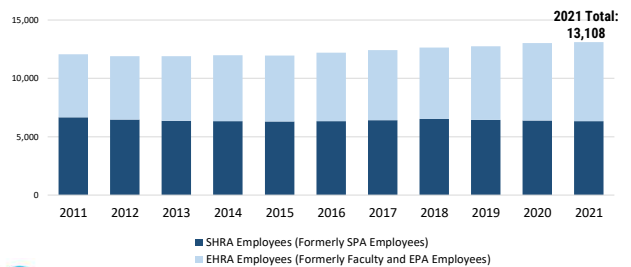
UNC-Chapel Hill student enrollment by housing type (total of 31,641 students in 2021)



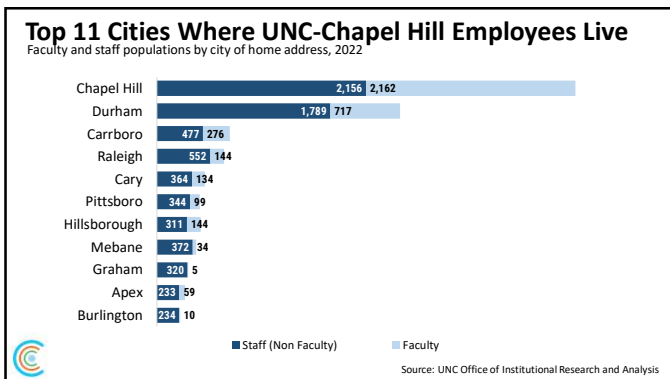
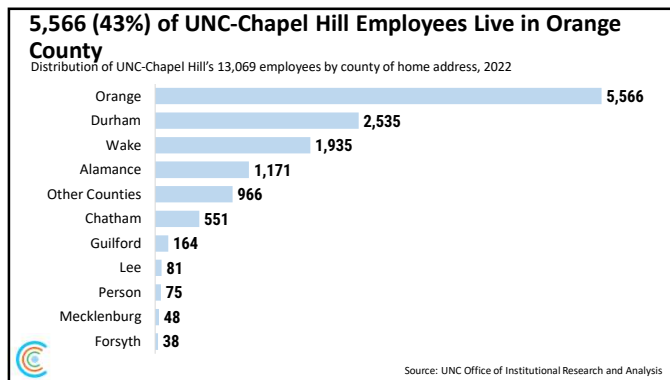
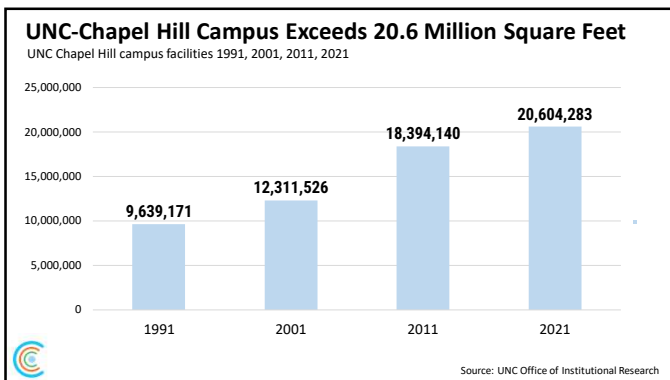
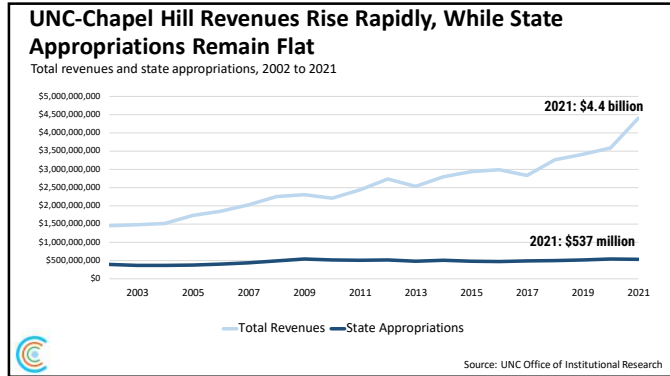
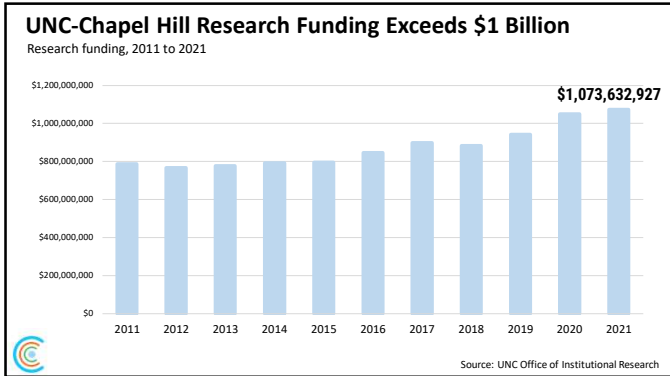
Source: UNC Office of Institutional Research and Analysis

### UNC-Chapel Hill Employment Surpasses 13,000

UNC-CH employment by employment classification, 2011 to 2021

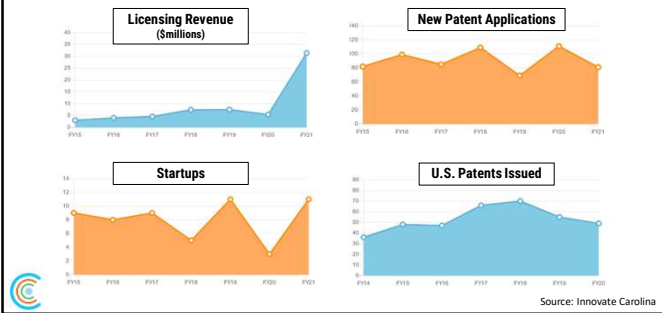


Source: UNC Office of Institutional Research

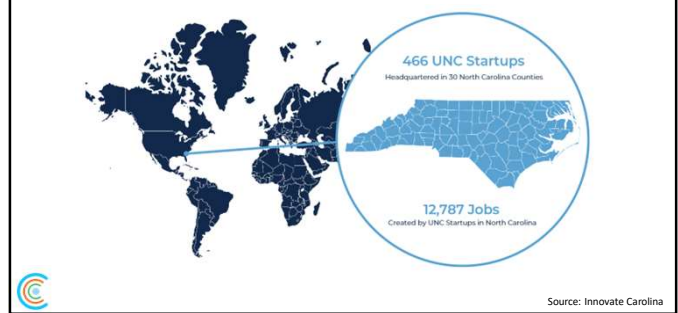


# UNC Chapel Hill Innovation & Entrepreneurship

## UNC Chapel Hill Innovation and Entrepreneurship



## UNC Startups Employ 89,818 People Globally

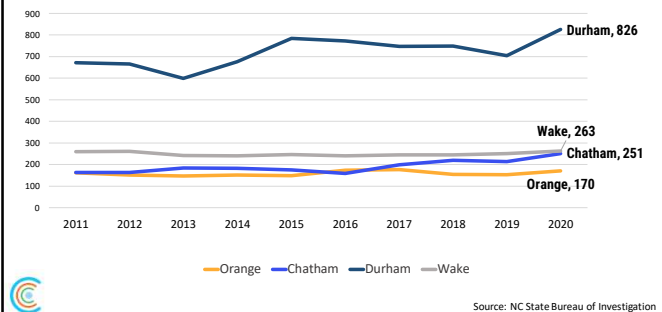


Just a few more things  
(so much more in the full DataBook)

Crime

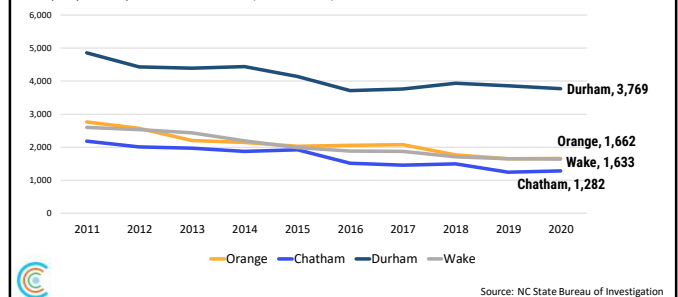
### Violent Crime Rises Slightly

Violent crimes per 100,000 residents (2011 to 2020)

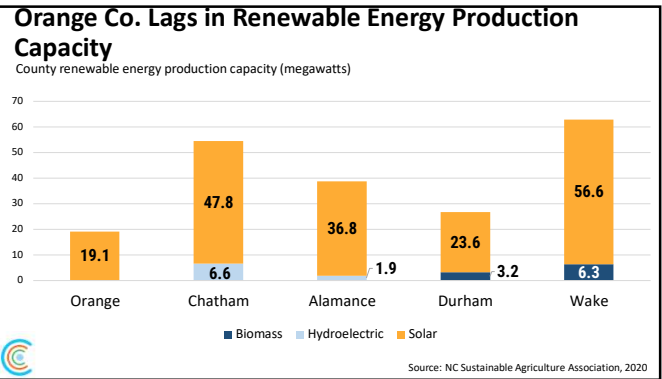


### Property Crime Down Across the Triangle; Chatham Has Lowest Rates

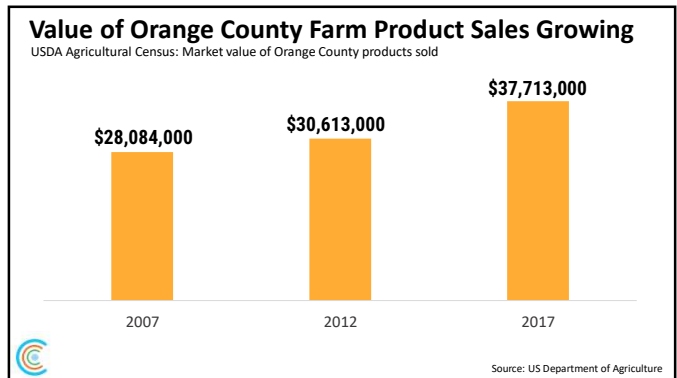
Property crimes per 100,000 residents (2011 to 2020)



# Natural Resources



# Farming



# Waste, Recycling, and Emissions



### County Recycling Program Performance

Top 5 Public Recycling Per Capita	Top 5 Household Recyclables Per Capita Recovery
Iredell County (1)	Catawba County (1)
Catawba County (2)	Dare County (2)
Pitt County (3)	<b>Orange County (3)</b>
<b>Orange County (4)</b>	Pitt County (4)
Macon County (5)	Currituck County (5)
<b>Chatham County (50)</b>	<b>Chatham County (47)</b>

Source: NC Division of Environmental Assistance and Customer Service 2017 (DEACS)