



19<sup>th</sup> Annual

# State of the Community Report

June 4, 2026

Presented



# Welcome



**Elie Abou-Rjeileh**  
2026 Chamber Board Chair



**Dr. Amir Barzin**  
COO and Interim President of UNC Faculty Physicians



**Dr. Ivy Taylor**  
Director of Local Relations



The University  
of North Carolina  
at Chapel Hill



**Chris Elkins**  
Vice President of Sales

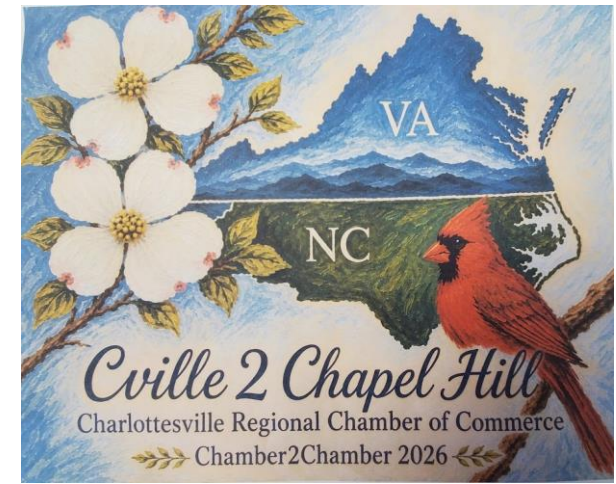




CHARLOTTESVILLE, VA | SEPT. 27 - 29

# INTER-CITY VISIT AND LEADERSHIP CONFERENCE

A program of The Chamber's Partnership for a Greater Chapel Hill-Carrboro



## Presenting Sponsors



## 2026 Data Partners



## Program Sponsors



## Contributing Sponsors



# Presenting Sponsors



**TRIANGLE**  
COMMUNITY  
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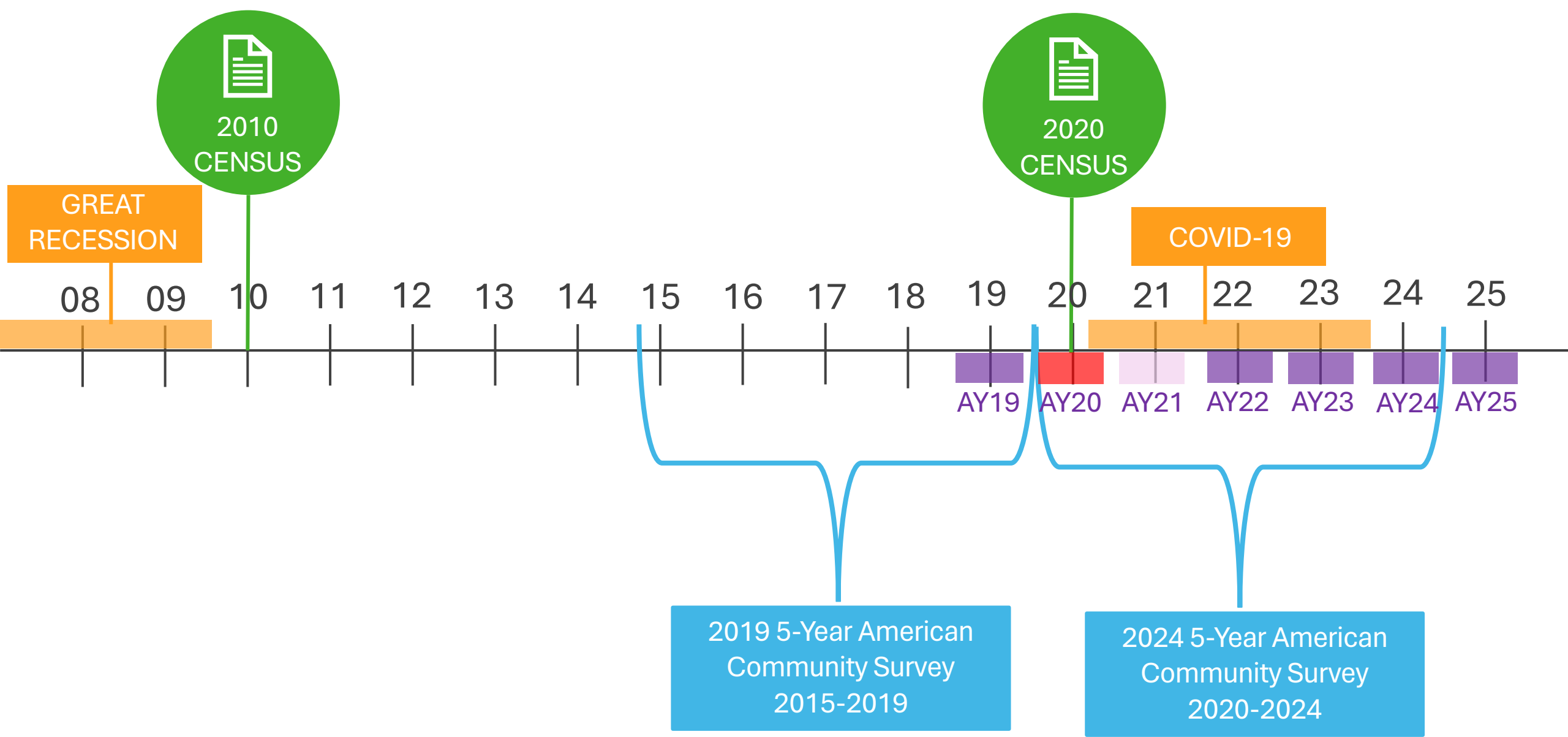
# Deirdre Gordon

Vice President of Philanthropic Engagement





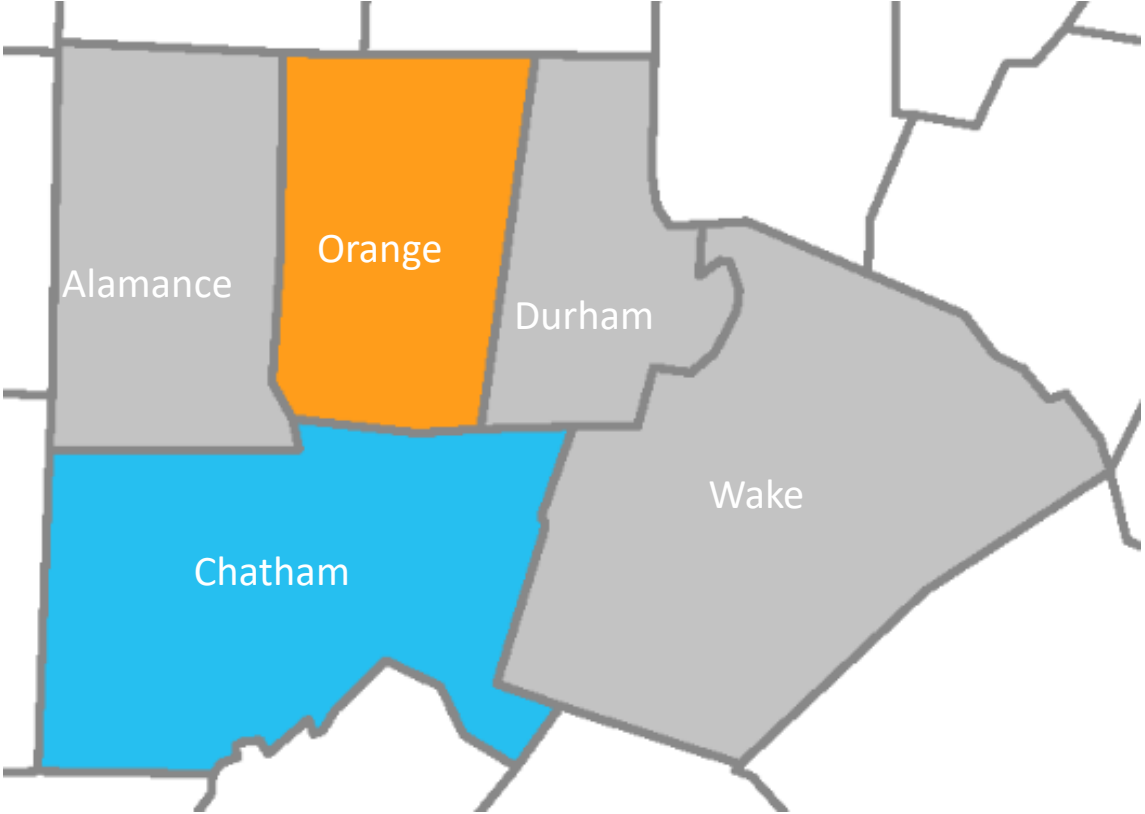
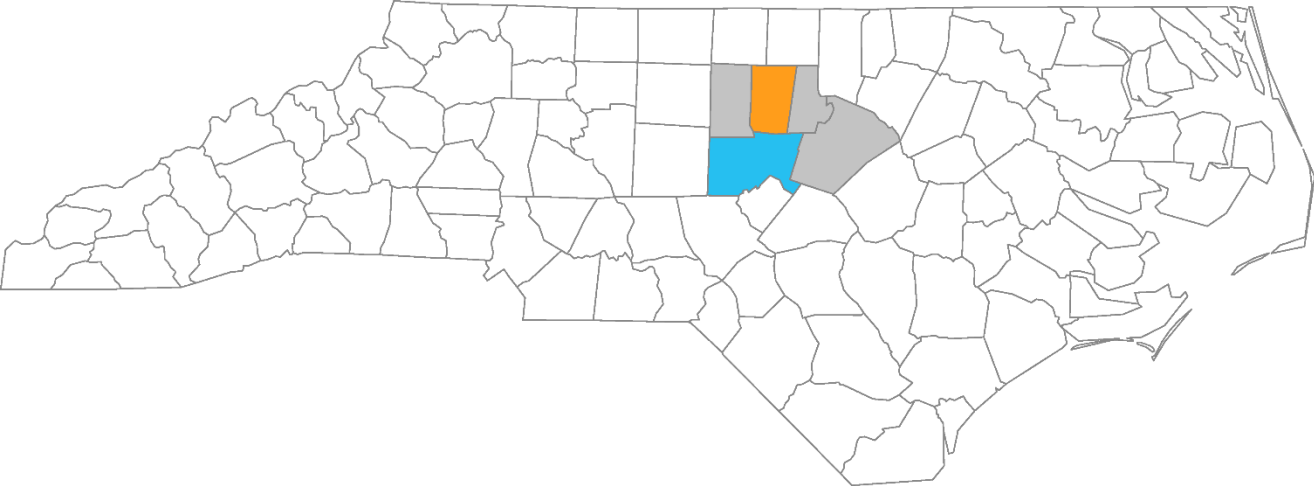




# The Timeline

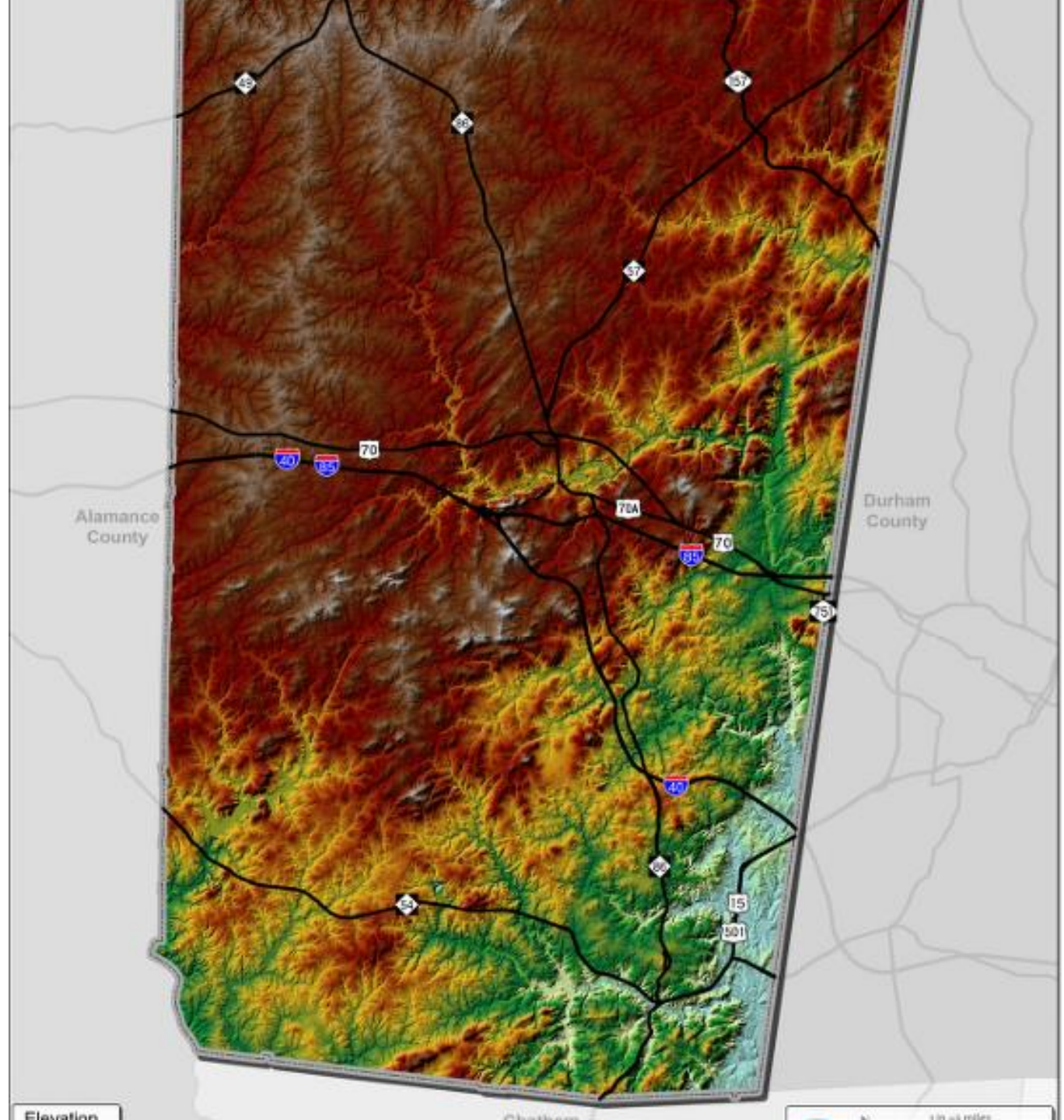
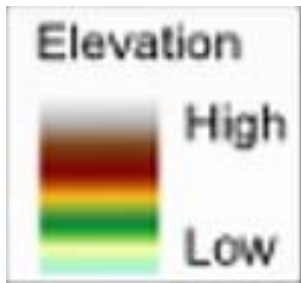
# Geography

# Orange County + Chatham County + Neighbors



# Orange County NC

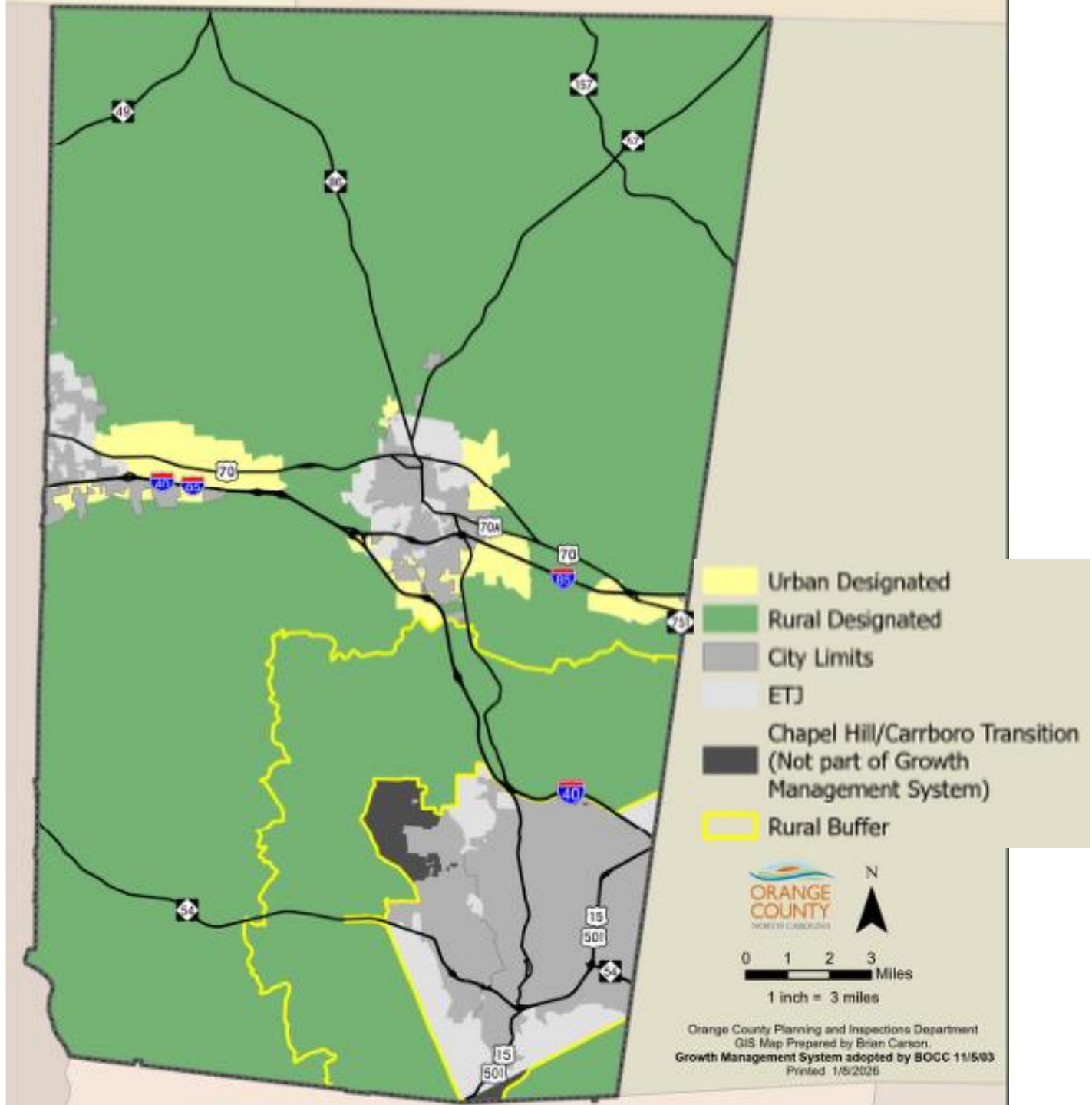
## Topography



# Orange County NC

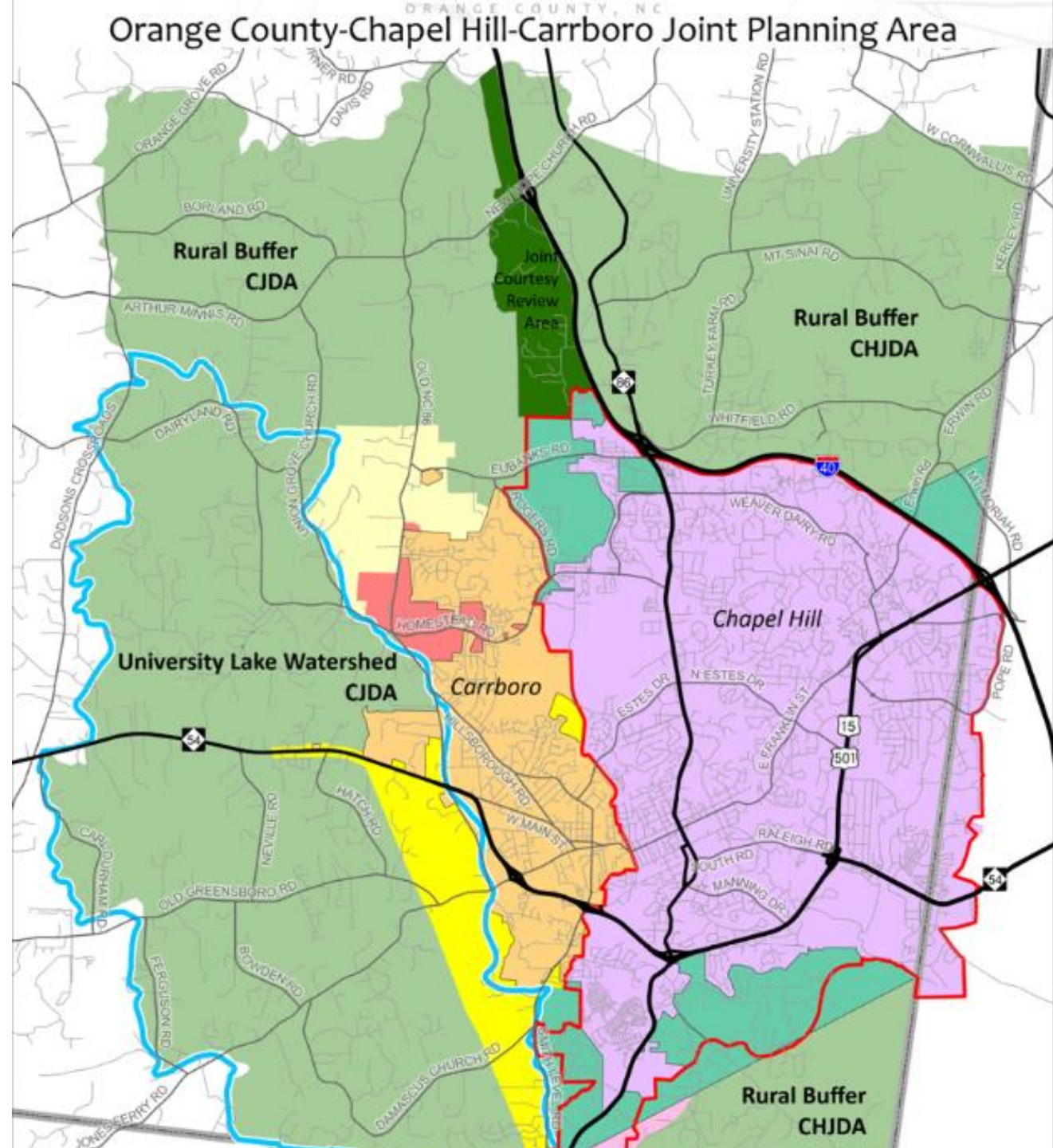
## Growth Management System Map

### Urban and Rural Designated Areas

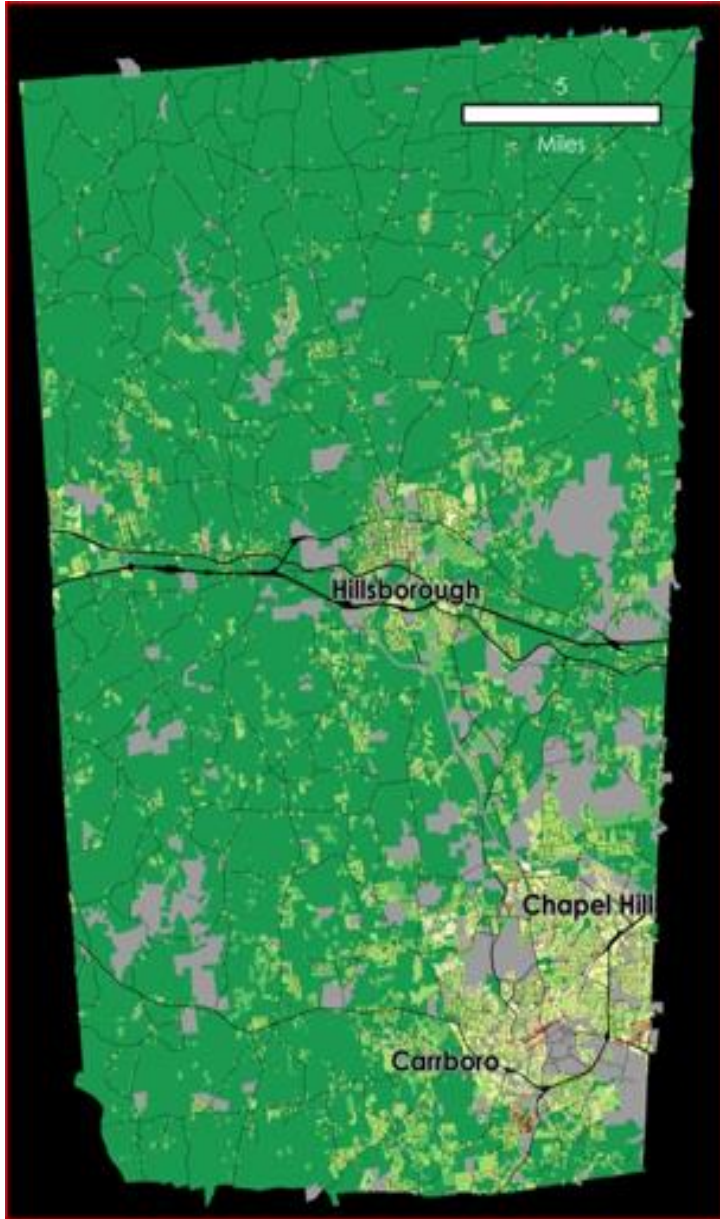


# Orange County NC

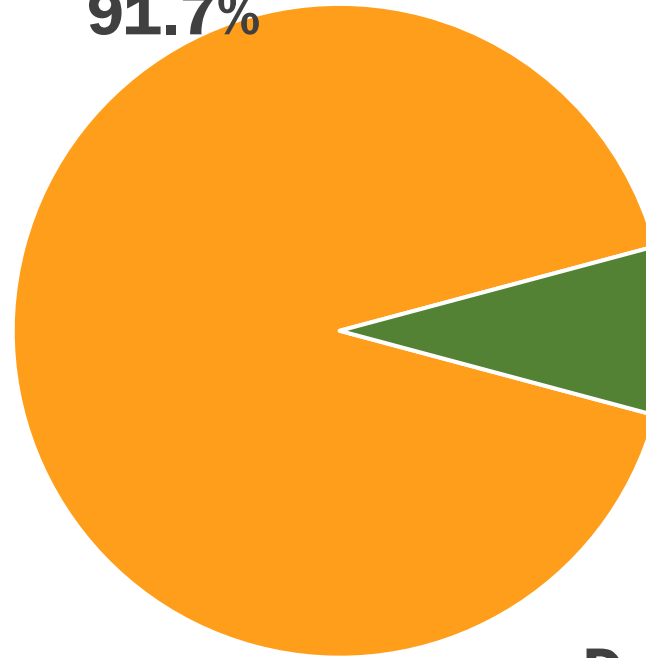
## Joint Planning Area and Rural Buffer



# Orange County Land and Municipal Boundaries



**Unincorporated  
Orange**  
**364.81 sq mi**  
**91.7%**



**Durham**  
**0.01 sq mi**  
**0.0%**

**Mebane**  
**1.84 sq mi**  
**0.5%**

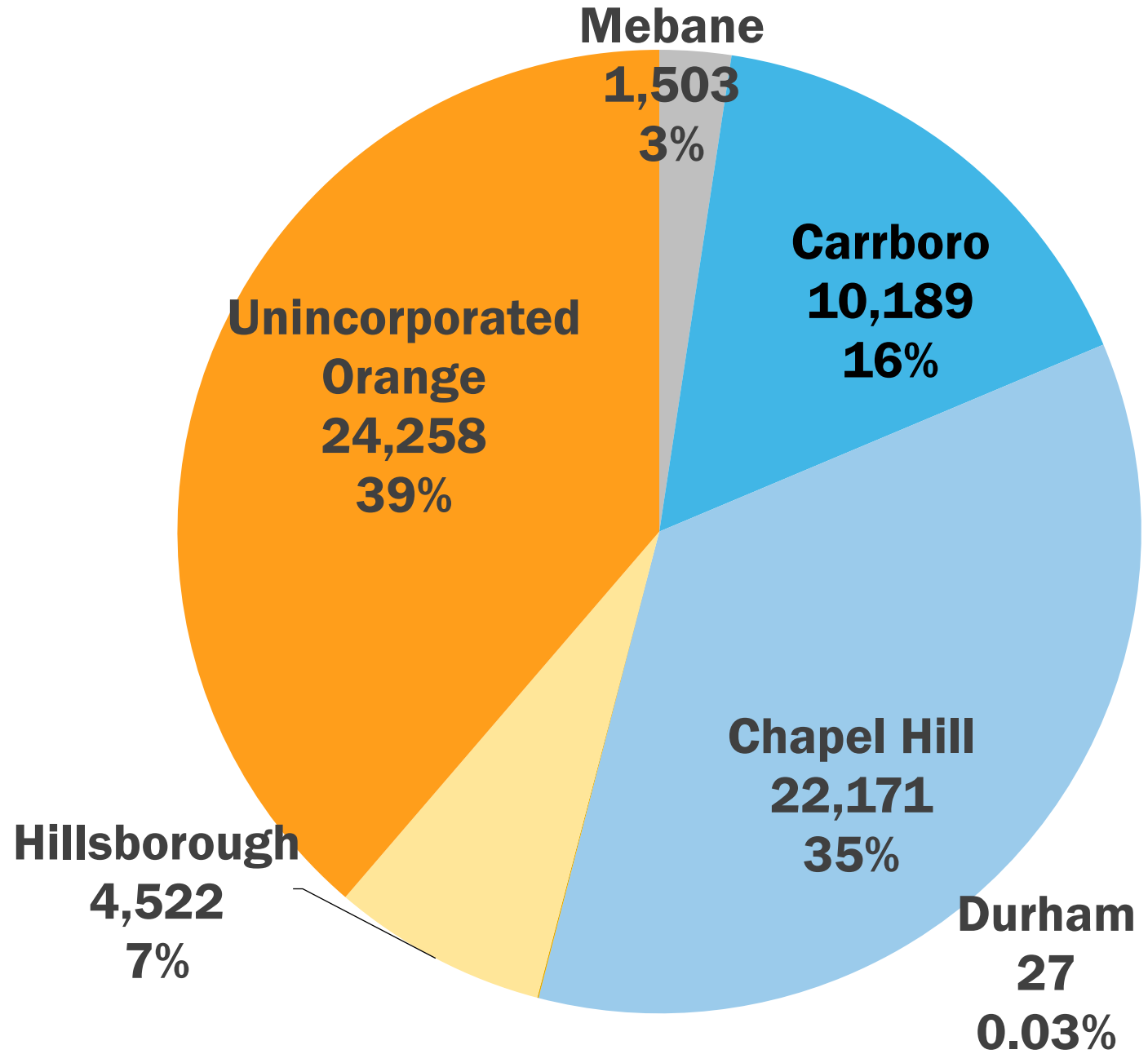
**Carrboro**  
**6.46 sq mi**  
**1.6%**

**Chapel Hill**  
**19.5 sq mi**  
**4.9%**

**Hillsborough**  
**5.33 sq mi**  
**1.3%**

# Orange County Housing Unit Breakdown

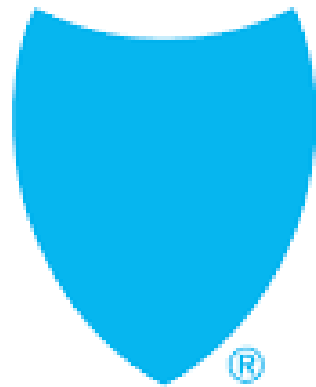
62,858 total housing units



Source: American Community Survey (2020-2024 5-Year Estimates)

# Health

presented by



**North  
Carolina**



**Susan Richards**

**Direct Sales Team Lead**



# Carolina HealthWorks

Available to members of the NC Chamber and participating local chambers

Stronger, better – and healthier – together



The state's most preferred health insurer<sup>1</sup>



Committed to improving the health & well-being for all



Premier business advocate



National leader for private sector job growth and making NC a top state for work

<sup>1</sup> Blue Cross NC Brand Tracking; Burke; November 2024. Data comparison against top competitors that sell across all group markets in NC and considered by Benefit Decision Makers.

# Carolina HealthWorks

Delivering value through savings, enrollment, and membership growth



Up to 45% savings  
compared to ACA<sup>1</sup>



1,000+ companies enrolled  
as of April 2026<sup>2</sup>



8,000+ members  
as of April 2026<sup>2</sup>

<sup>1</sup> Projected rate comparison savings reflected. Results may vary due to contract changes and plan selection. Blue Cross NC, (2024, February 30) Actuary/BM Modeling Report - January 2025 Renewals.

<sup>2</sup> Blue Cross NC, (2024, April 30) MFM Gold Group as of April 30, 2024.

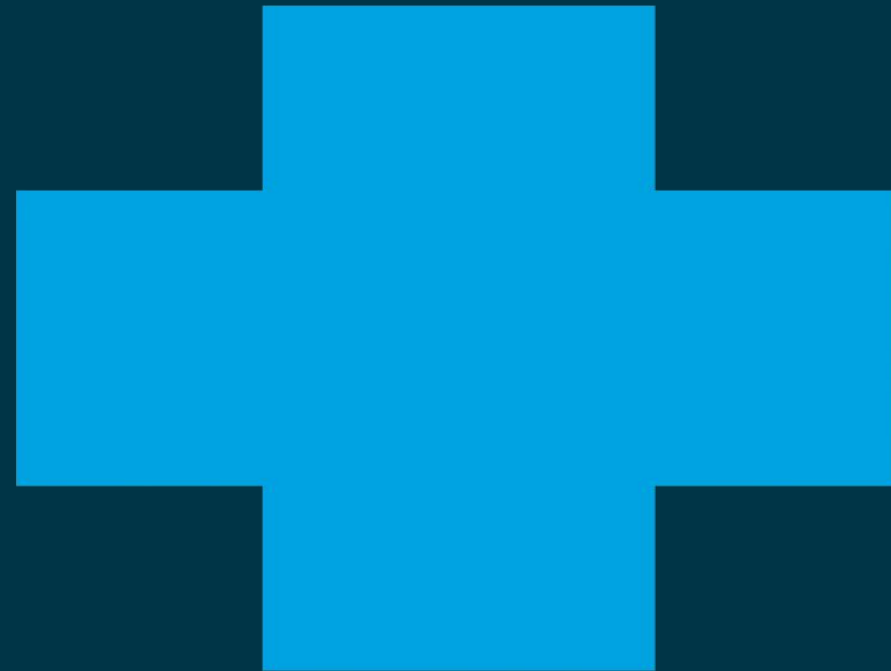
## We're with you every step

- Let's get started!
  - Visit [BlueCrossNC.com/HealthWorks](https://BlueCrossNC.com/HealthWorks)  
or
  - [carolinachamber.org/carolina-healthworks/](https://carolinachamber.org/carolina-healthworks/)



# Carolina HealthWorks

# Thank You



The NC Chamber is the sponsor and plan administrator of Carolina HealthWorks, which is a self-insured non-plan Multiple Employer Welfare Arrangement. Third-party administrative services are provided by Blue Cross and Blue Shield of North Carolina. The NC Chamber and Carolina HealthWorks are separate entities and do not provide Blue Cross or Blue Shield products or services. Benefits are provided by the NC Chamber Benefit Trust, with excess coverage from a licensed insurer. The Trust isn't backed by a guaranty association but is regulated by the NC Department of Insurance.

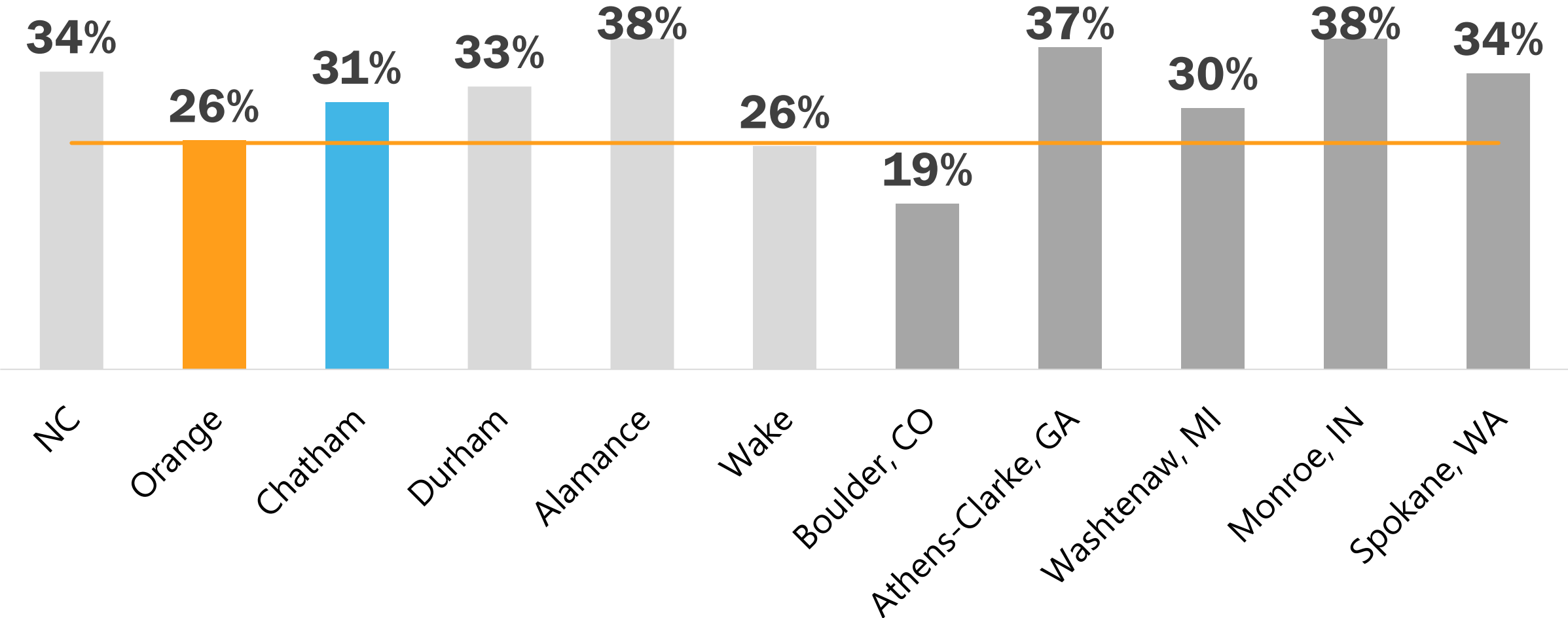
®, SM are marks of the Blue Cross and Blue Shield of North Carolina. U46173, 10/24

®, SM are marks of the Blue Cross and Blue Shield Association, an association of independent Blue Cross and Blue Shield plans. All other marks and names are property of their respective owners. Blue Cross and Blue Shield of North Carolina is an independent licensee of the Blue Cross and Blue Shield Association. U50044, 6/25



# Adults With Obesity

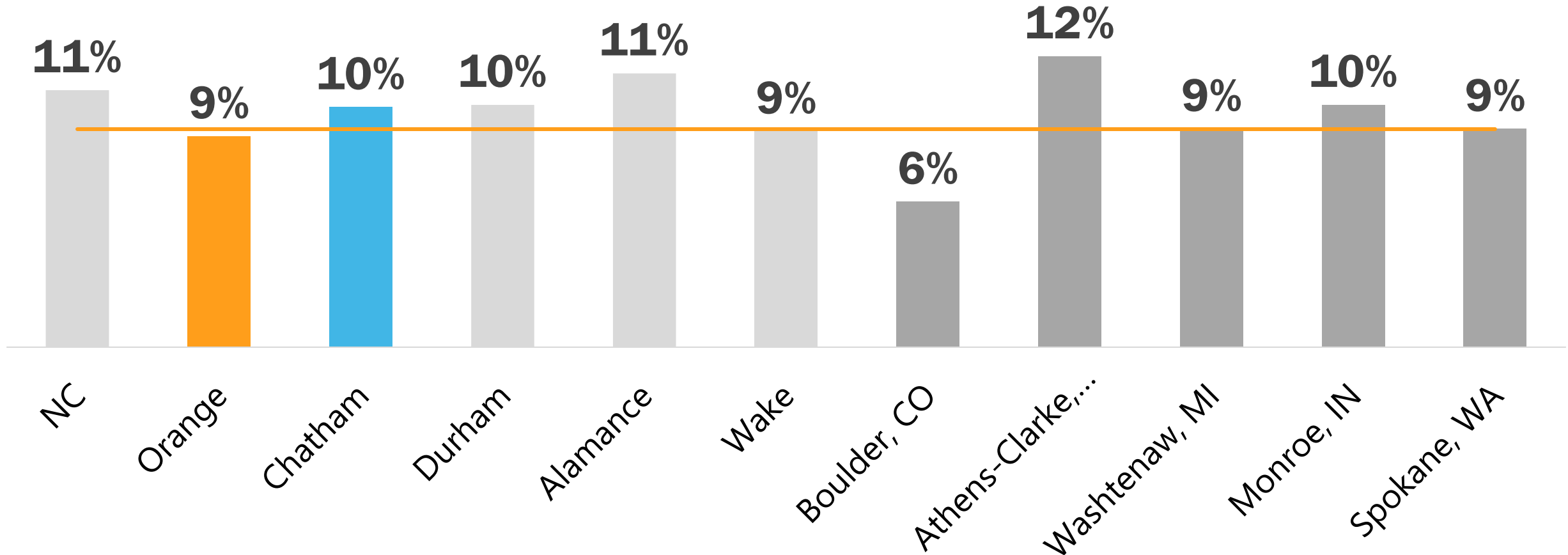
Percentage of the adult population (age 20+) that reports a body mass index (BMI) > 30



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

# Diabetes Prevalence

Percentage of adults (20+) with diagnosed diabetes

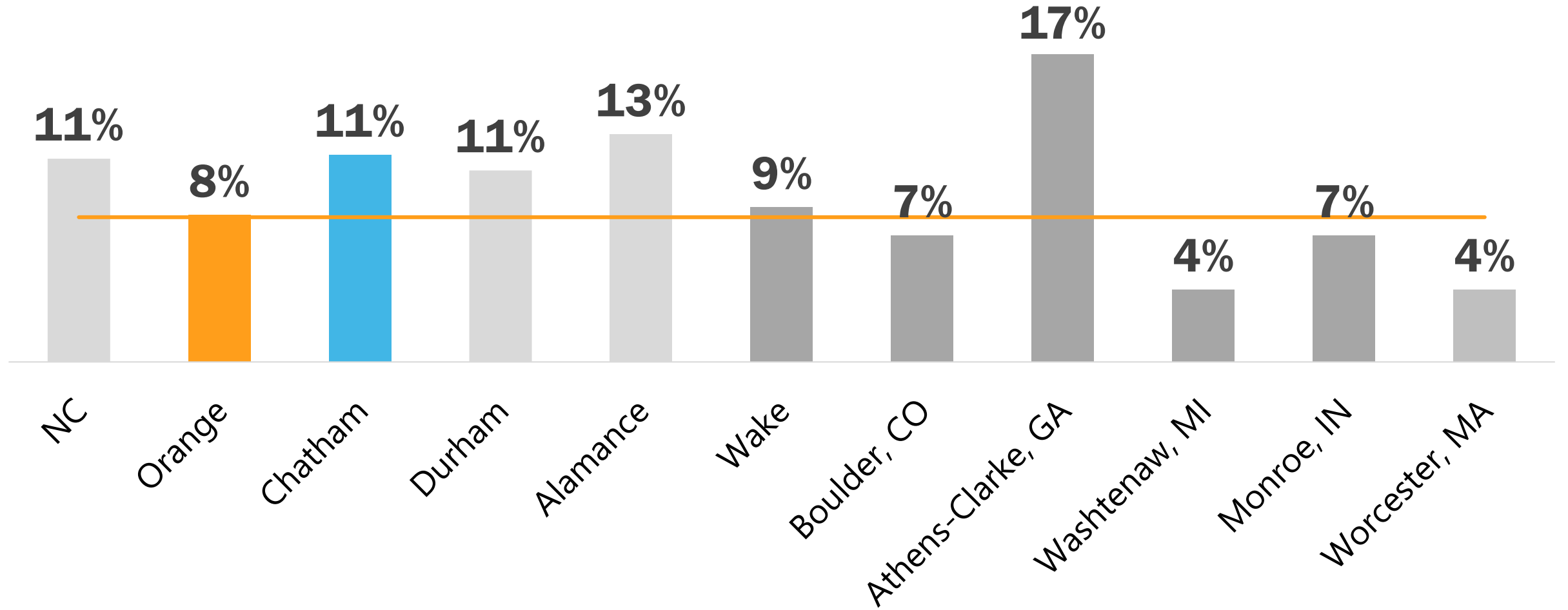


Note: Monroe, IN, Clarke, GA, and Washtenaw, MI are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2025 Robert Wood Johnson Foundation Health Rankings

# Uninsured Adults

Percentage of adults under the age of 65 without health insurance

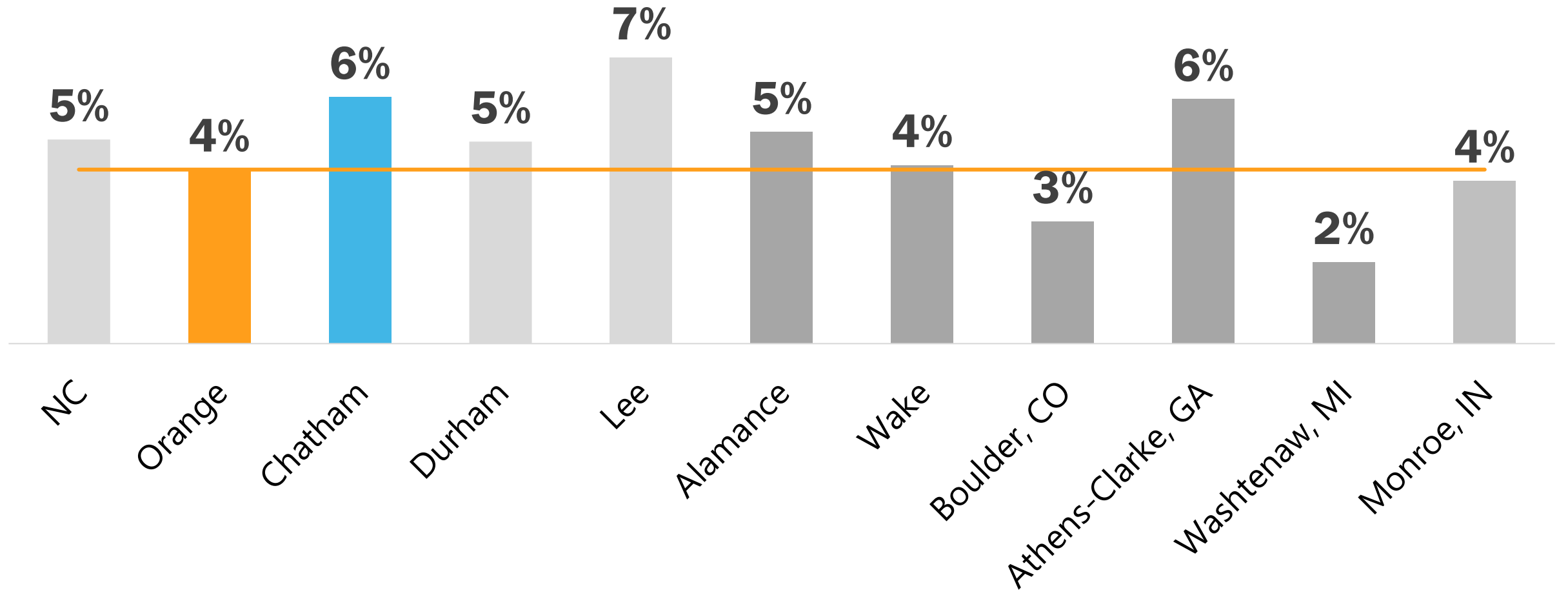


Note: Monroe, IN, Clarke, GA, and Washtenaw, MI are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2025 Robert Wood Johnson Foundation Health Rankings

# Uninsured Children

Percentage of children under the age of 19 without health insurance

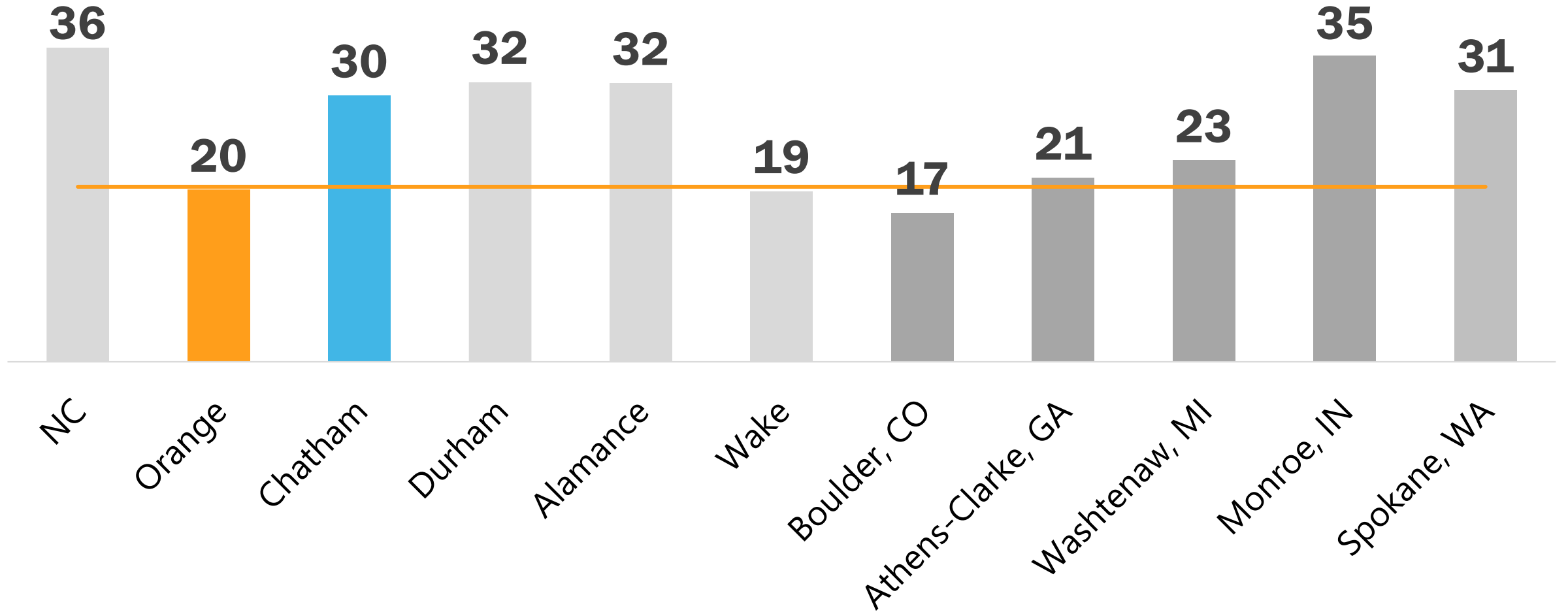


Note: Monroe, IN, Clarke, GA, and Washtenaw, MI are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2025 Robert Wood Johnson Foundation Health Rankings

# Drug Overdose Deaths

Number of drug poisoning deaths per 100,000 population

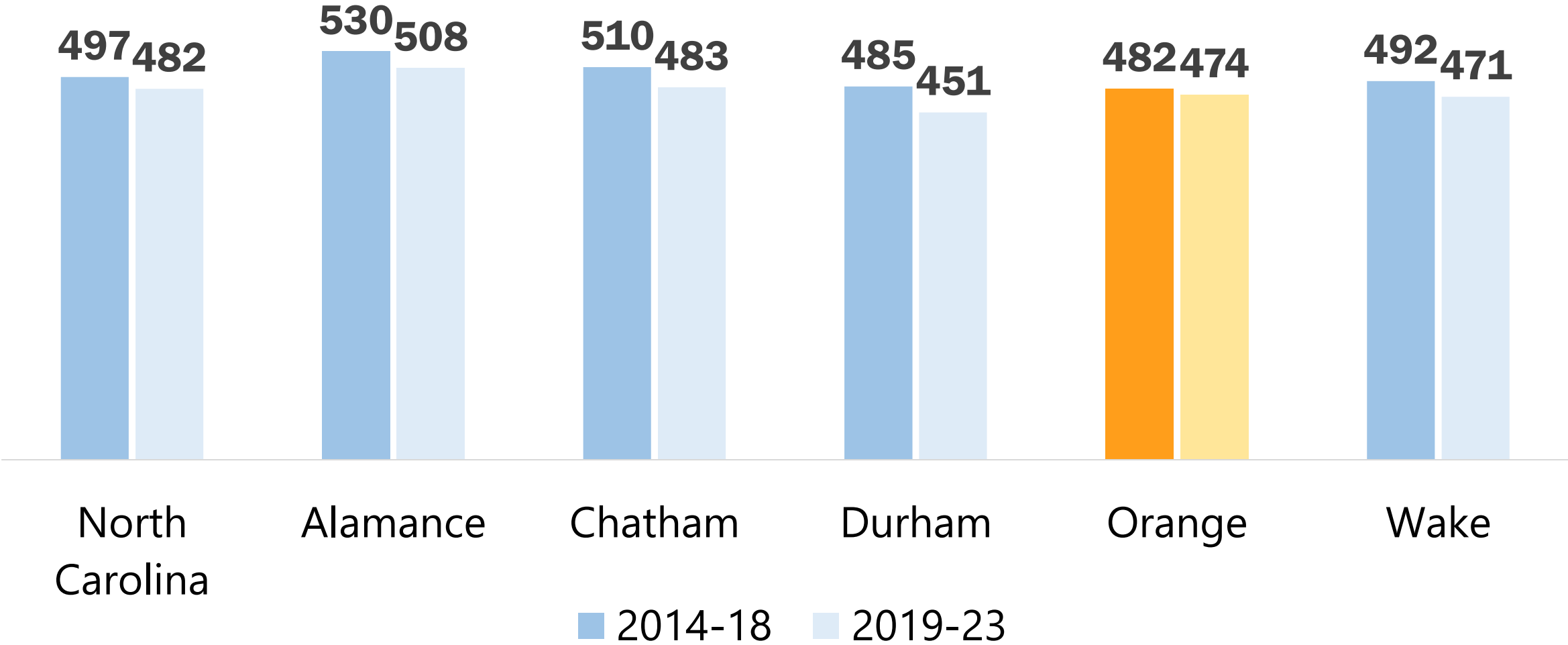


Note: Monroe, IN, Clarke, GA, and Washtenaw, MI are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2025 Robert Wood Johnson Foundation Health Rankings

# Total Cancer Rates

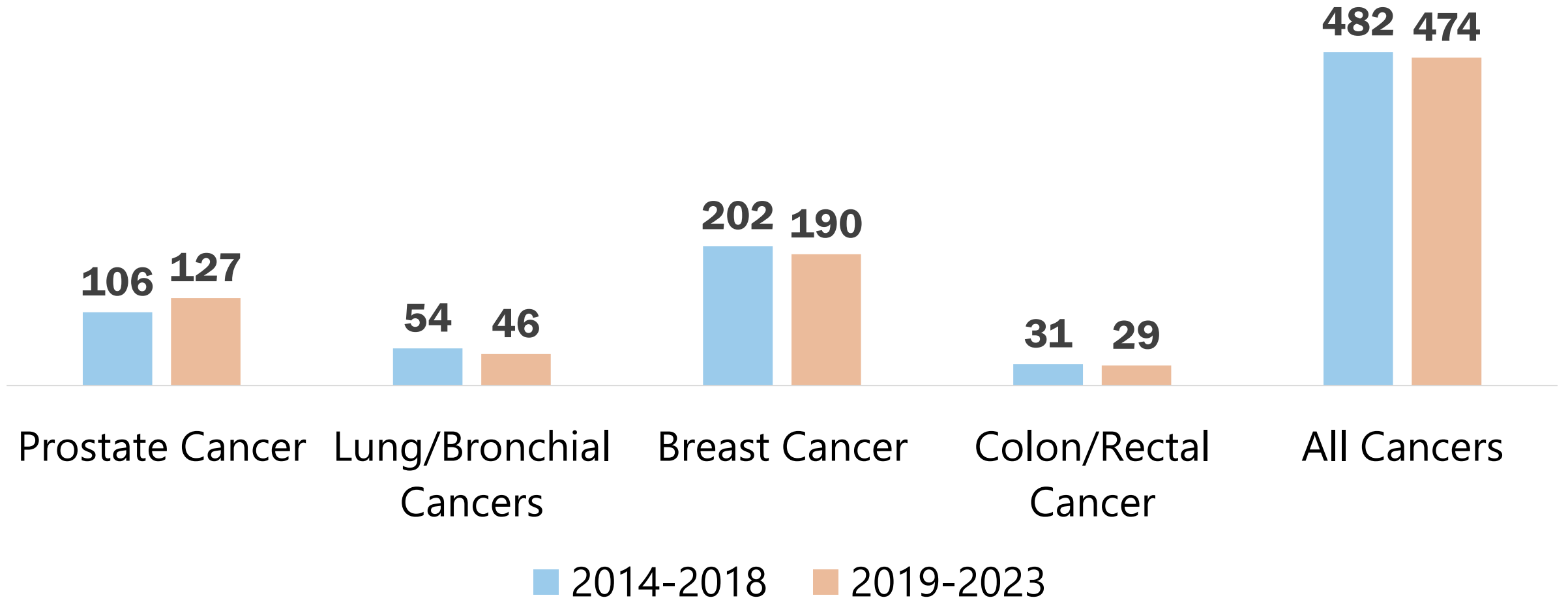
Cancer cases per 100,000 (2014-2018 vs. 2019-2023)



Source: NC State Center for Health Statistics

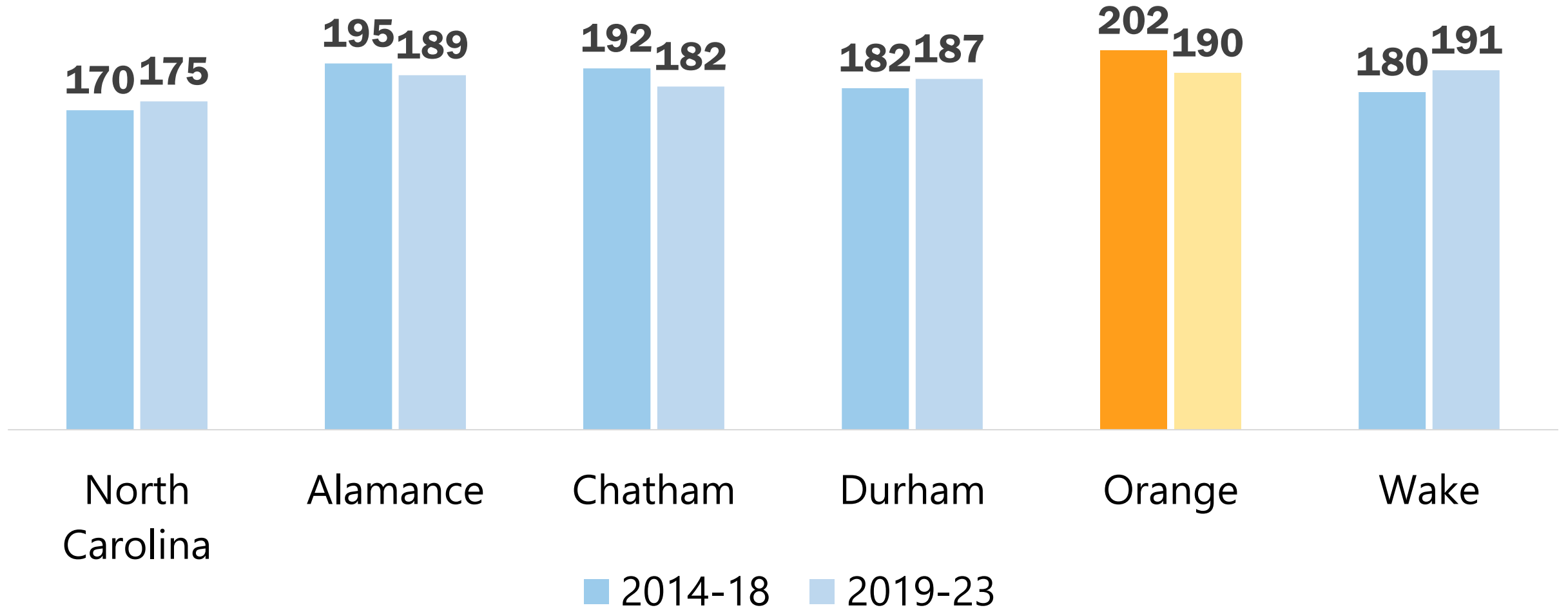
# Orange County Cancer Rates

Cancer cases per 100,000 (2014-2018 vs. 2019-2023)



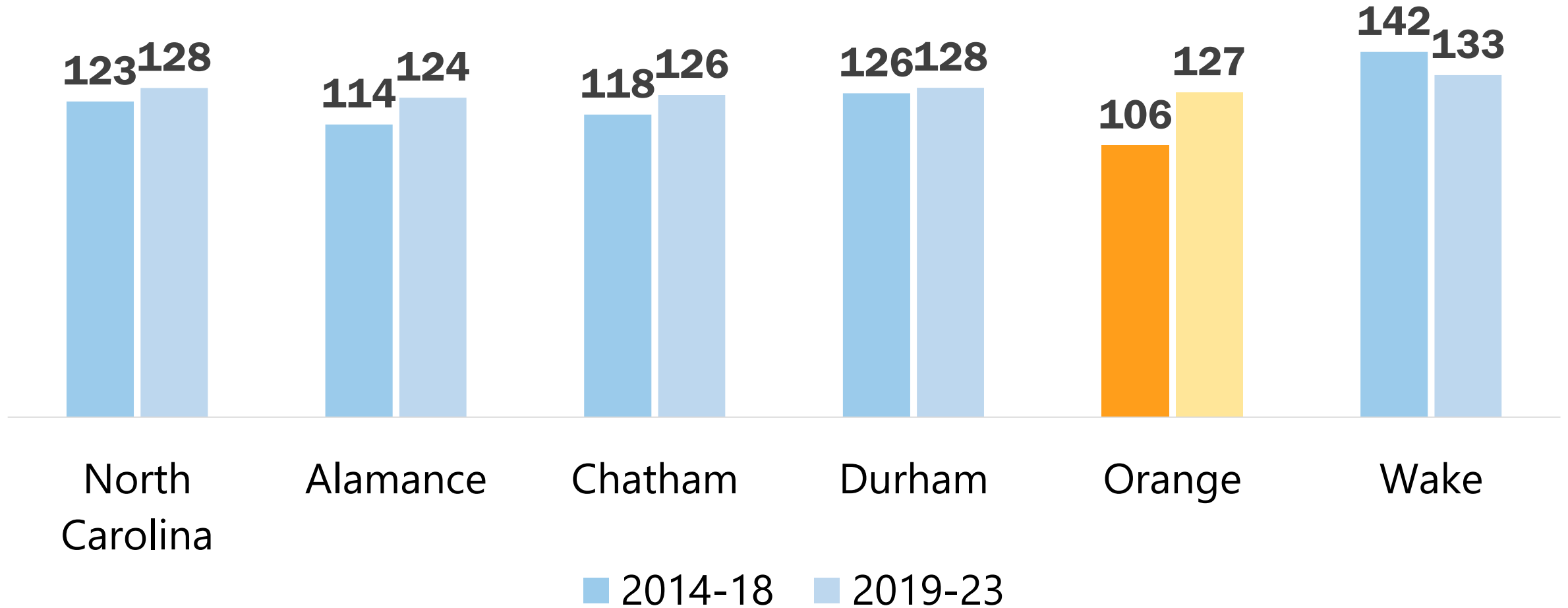
# Female Breast Cancer Rates

Female breast cancer cases per 100,000 (2014-2018 vs. 2019-2023)



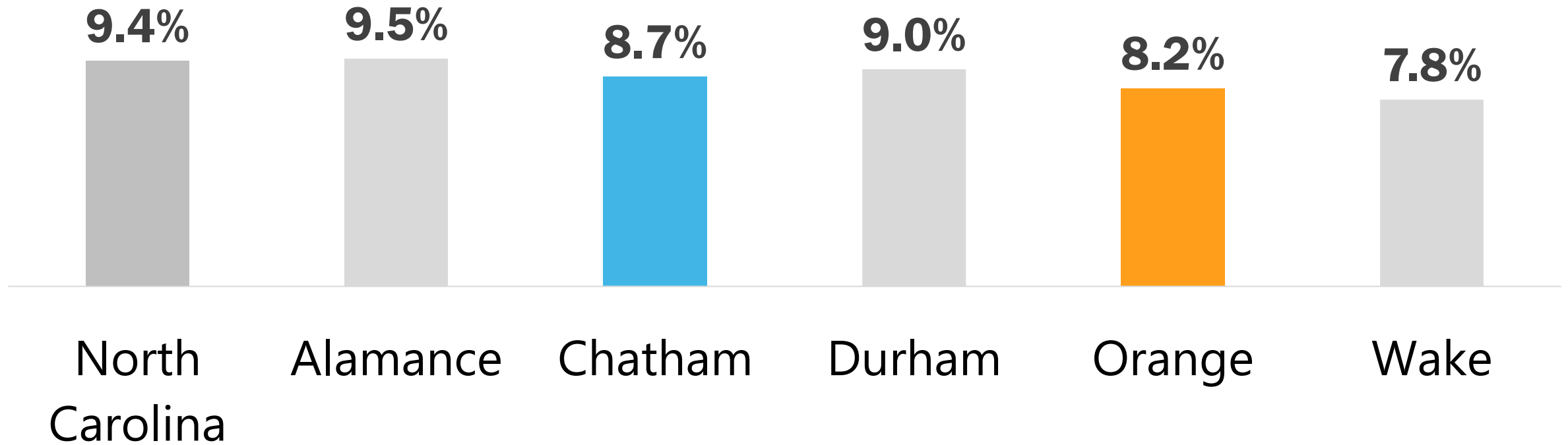
# Prostate Cancer Rates

Prostate cancer cases per 100,000 (2014-2018 vs. 2019-2023)



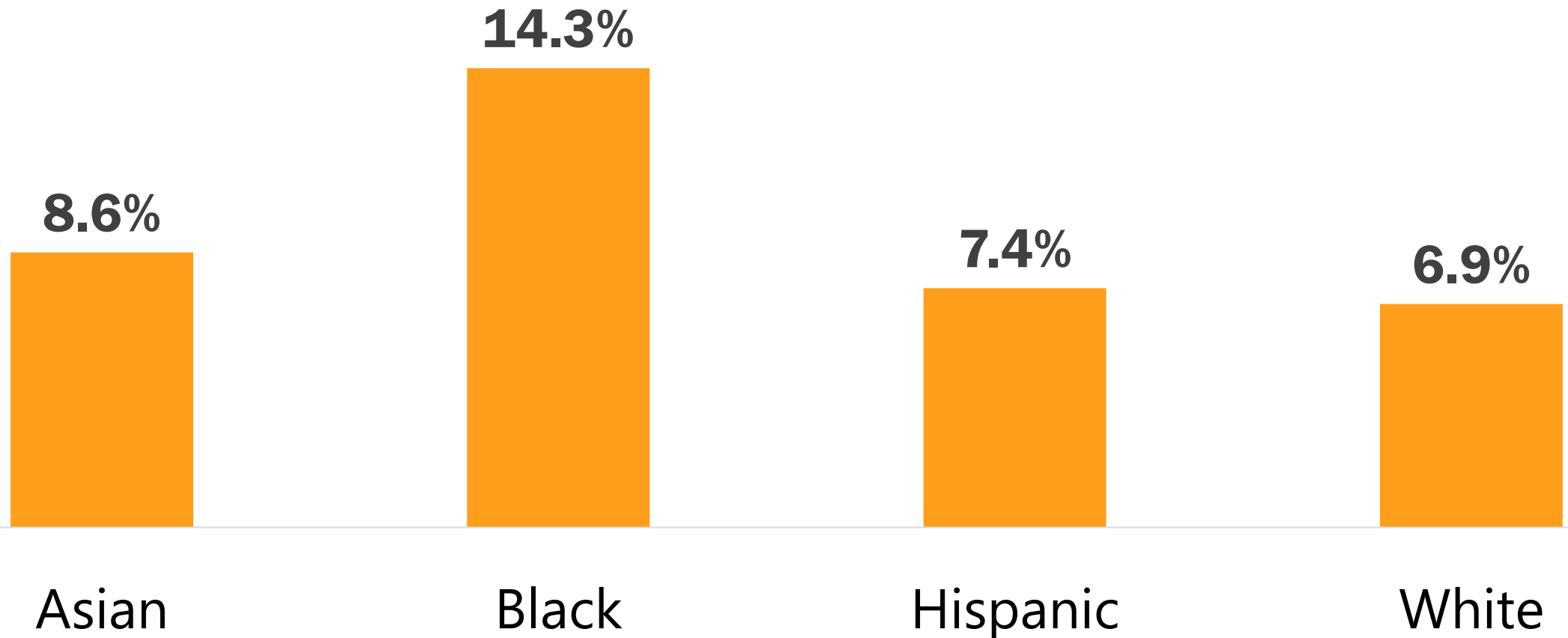
# Low Birthweight

Percent of births with low birthweight (<5.5lbs)



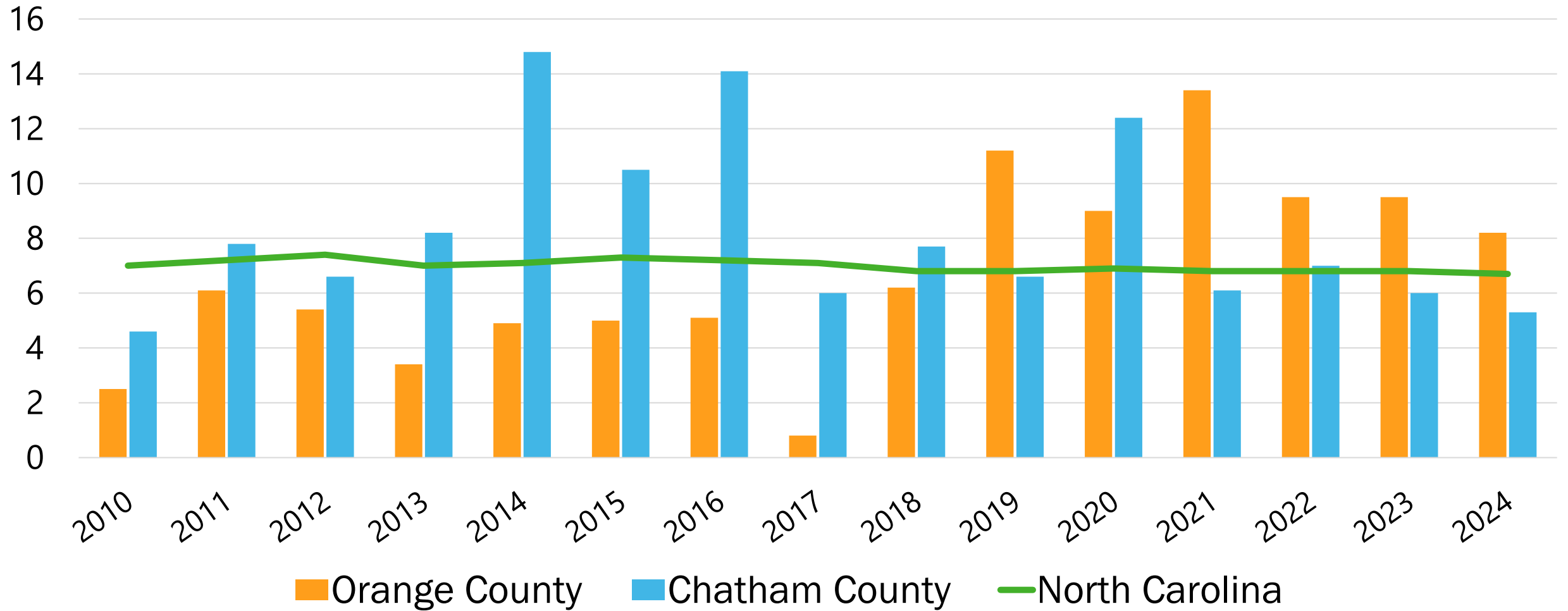
# Low Birthweight – Orange County Race/Ethnicity

Percent of births with low birthweight by race/ethnicity (<5.5lbs)



# Infant Mortality Rate

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



# Infant Mortality Rates by Race/Ethnicity

Orange and Chatham infant mortality rates by race/ethnicity (number of infant deaths less than 1 year per 1,000 live births) and state ranking among NC's 100 counties

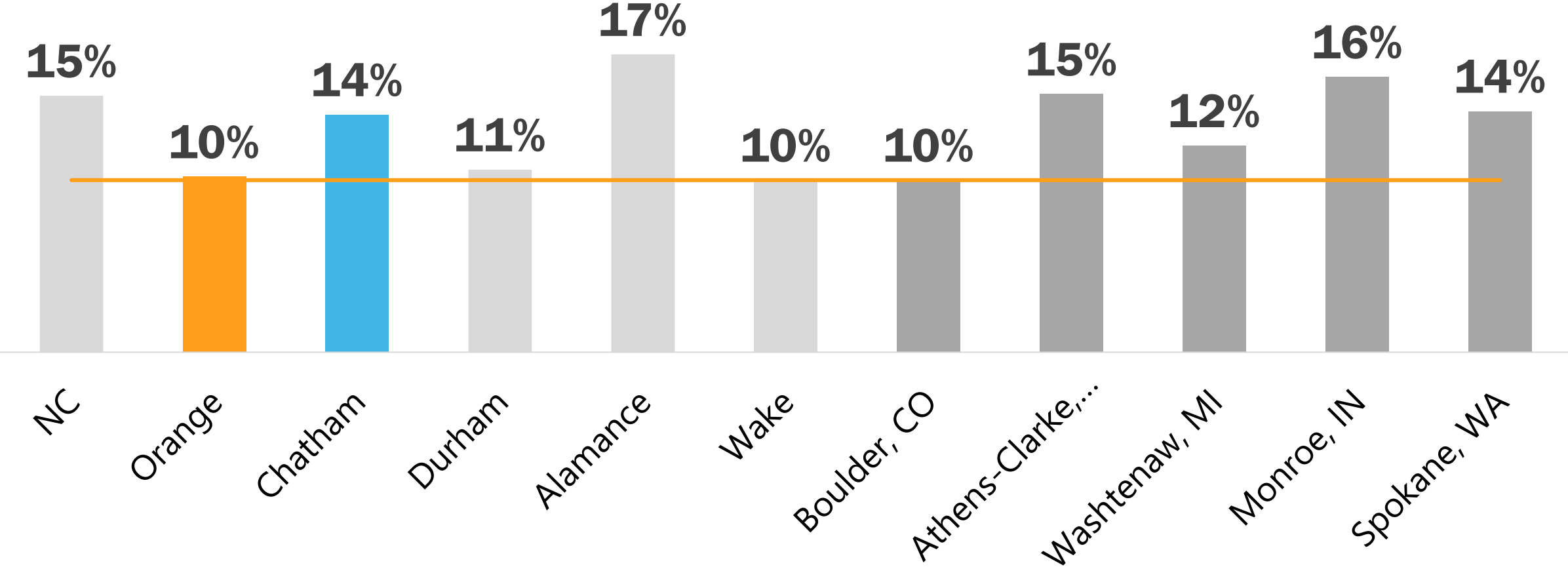
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	<b>Orange</b>	<b>Chatham</b>
Total rate	rank 67 (8.2)	rank 30 (5.3)
Non-Hispanic Black	rank 76 (17.2)	rank 86 (19.5)
Non-Hispanic White	rank 50 (5.0)	rank 26 (3.9)
Hispanic	rank 88 (11.5)	rank 57 (4.9)

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# Adult Smoking

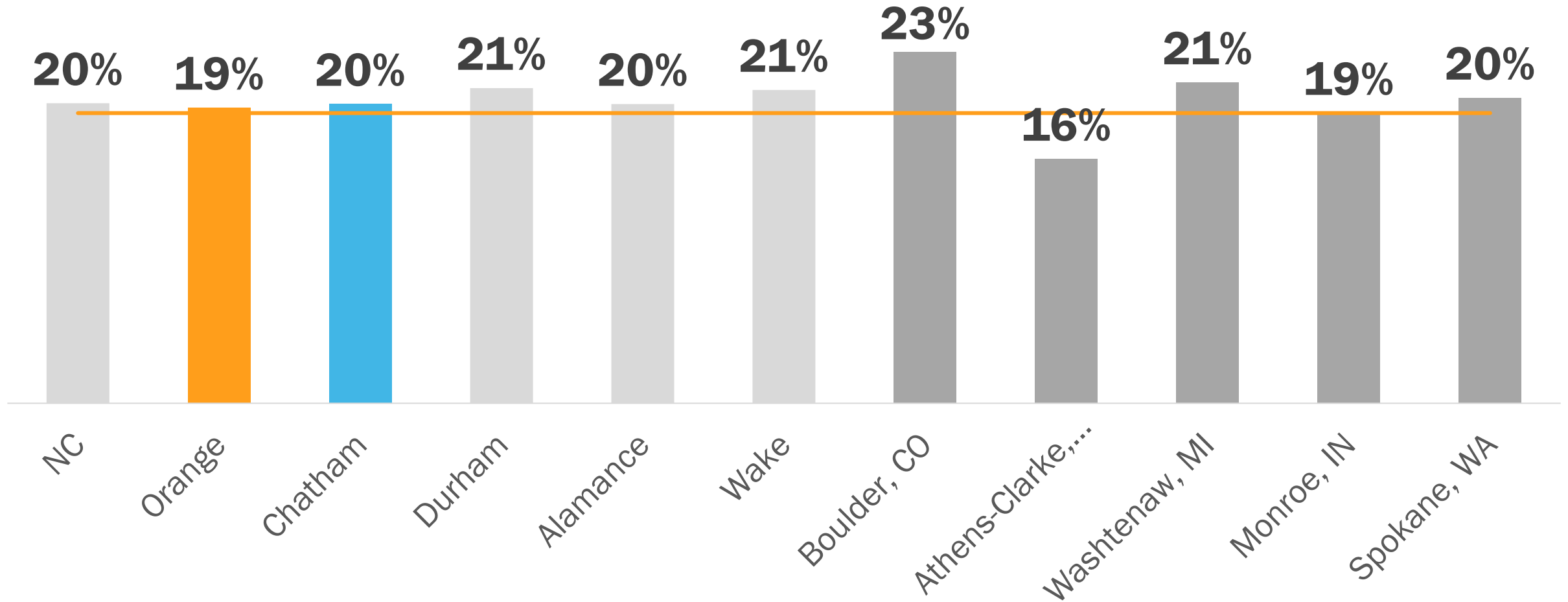
Percentage of adults who are current smokers



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

# Excessive Drinking

Percentage of adults who report binge or heavy drinking

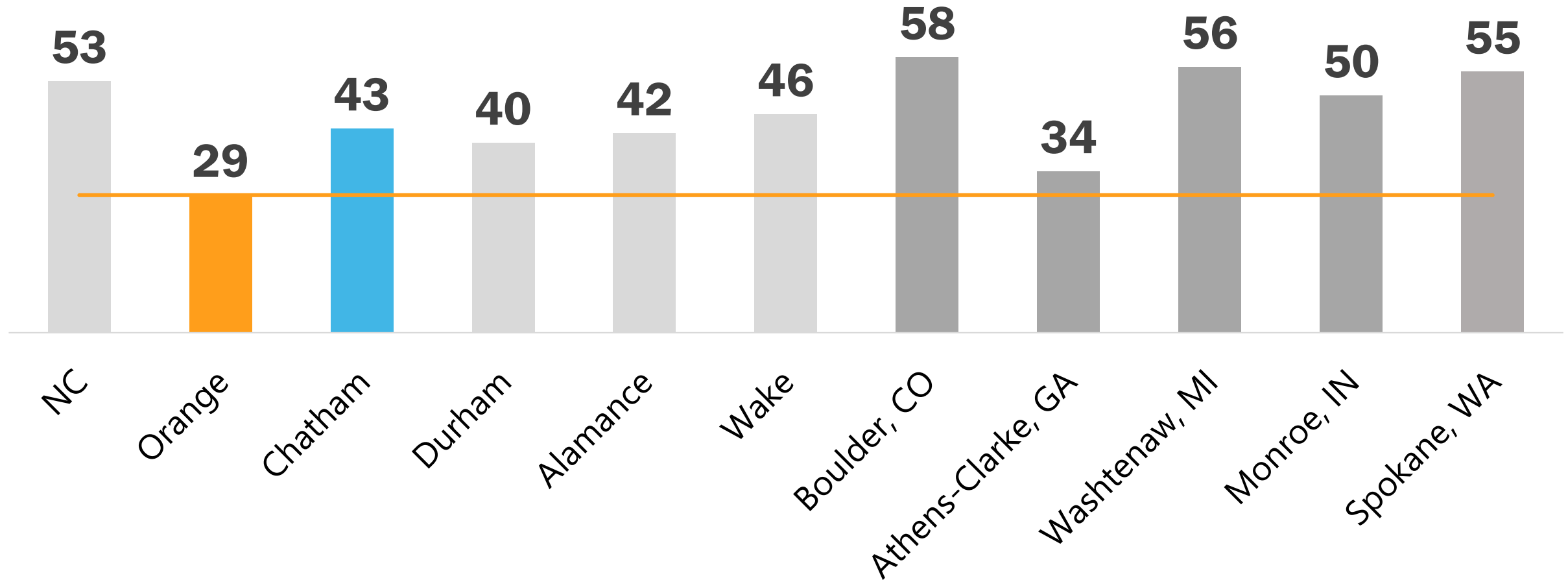


Note: Monroe, IN, Clarke, GA, and Washtenaw, MI are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2025 Robert Wood Johnson Foundation Health Rankings

# Residential Segregation Index, Black-White

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

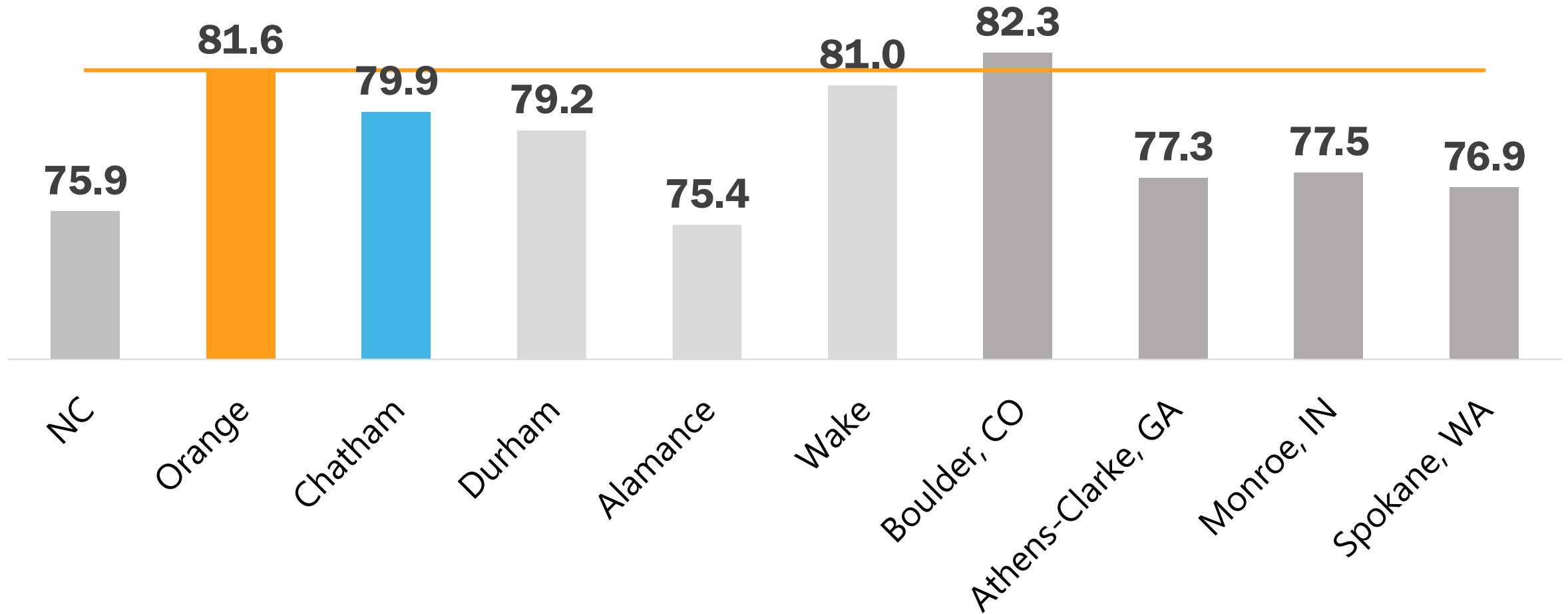


Note: Monroe, IN, Clarke, GA, and Washtenaw, MI are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2025 Robert Wood Johnson Foundation Health Rankings

# Life Expectancy

Average number of years a person can expect to live



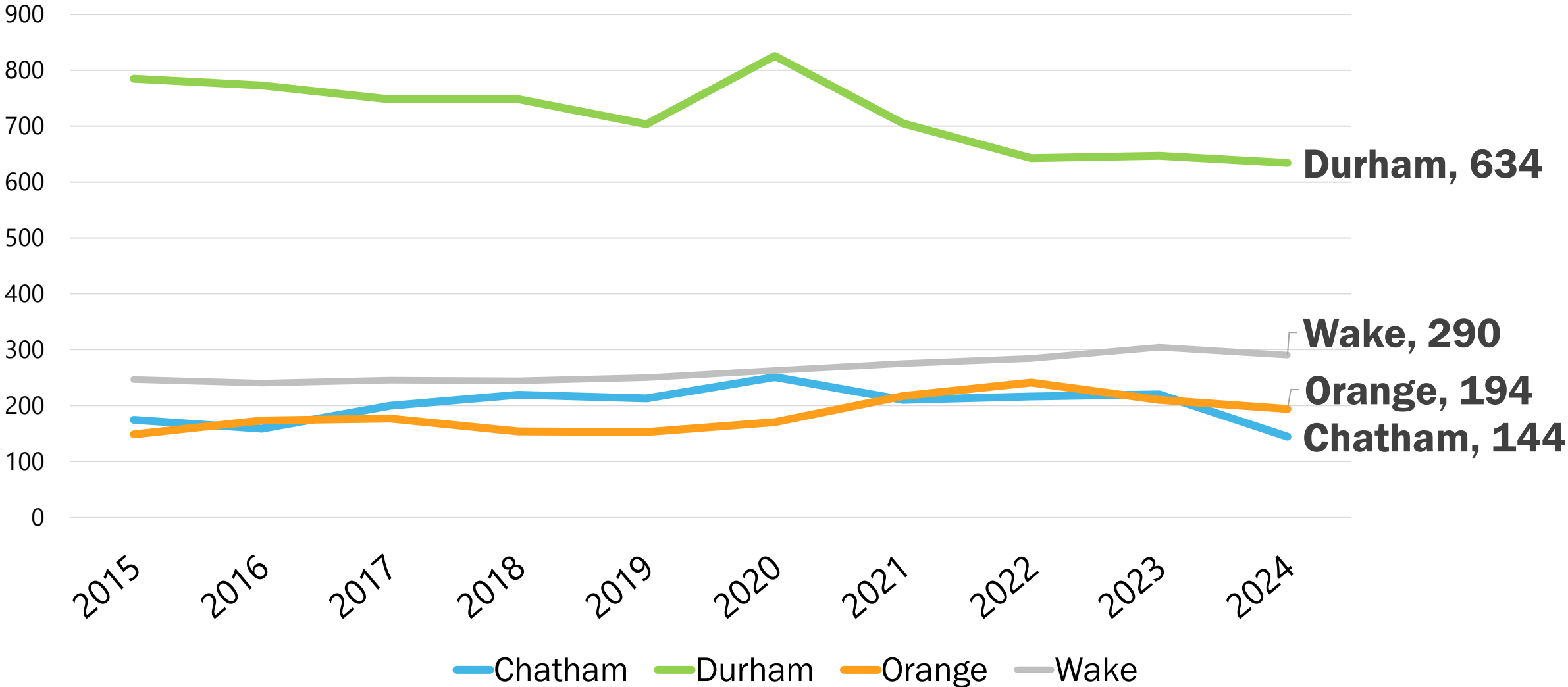
Note: Monroe, IN and Clarke, GA are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2025 Robert Wood Johnson Foundation Health Rankings

# **Community Health: Crime**

# Violent Crime Rates

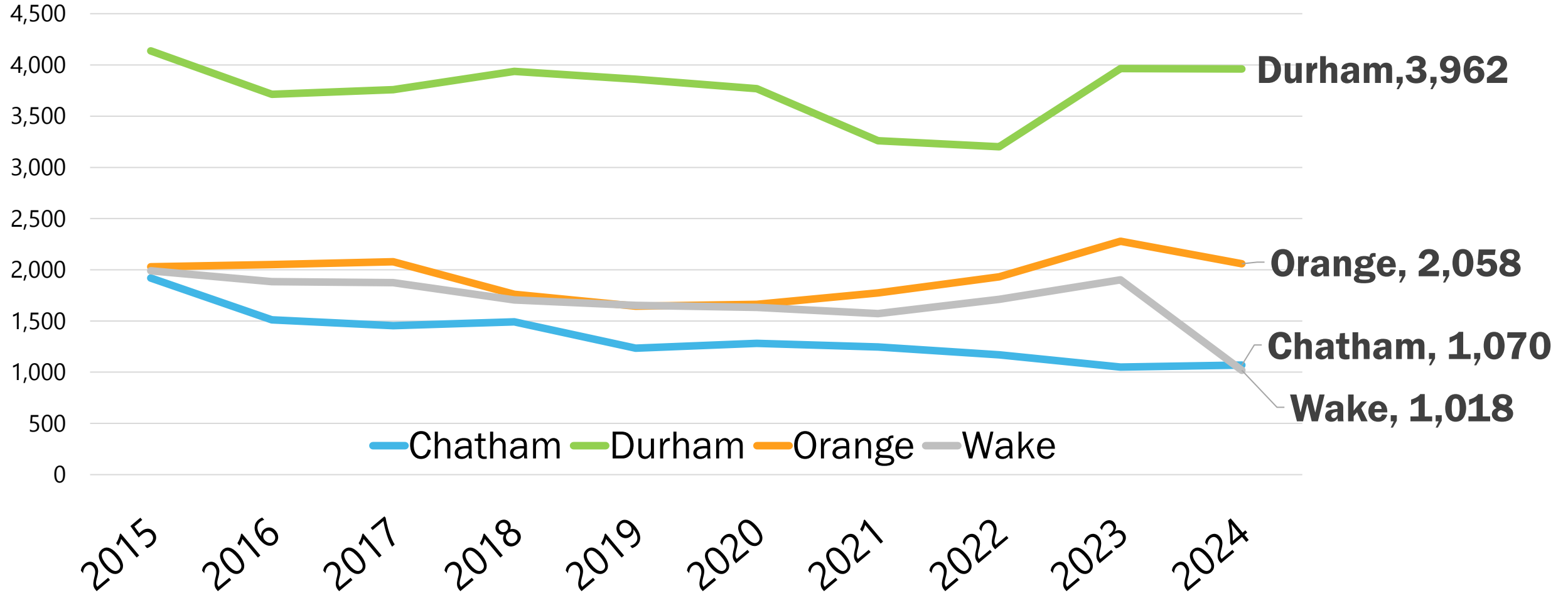
Violent crimes per 100,000 residents from 2015-2024



Source: NC State Bureau of Investigation

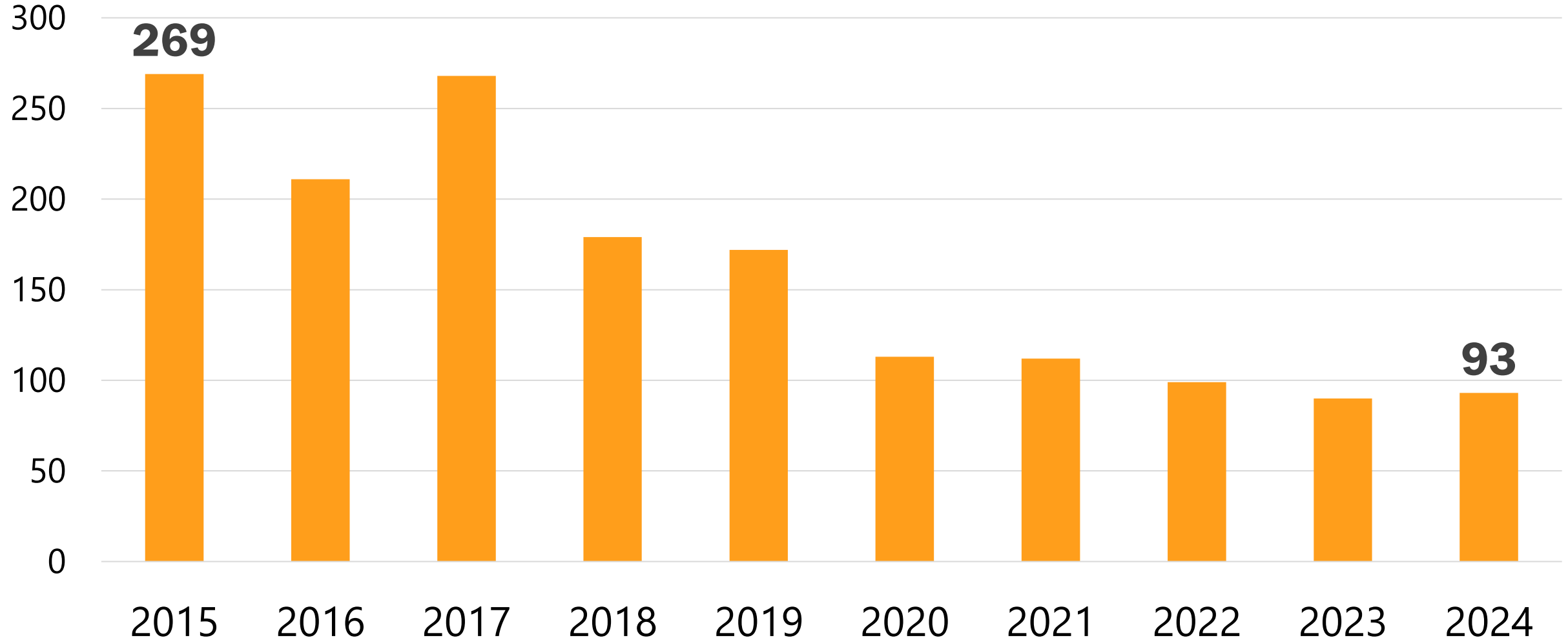
# Property Crime Rates

Property crimes per 100,000 residents from 2015-2024



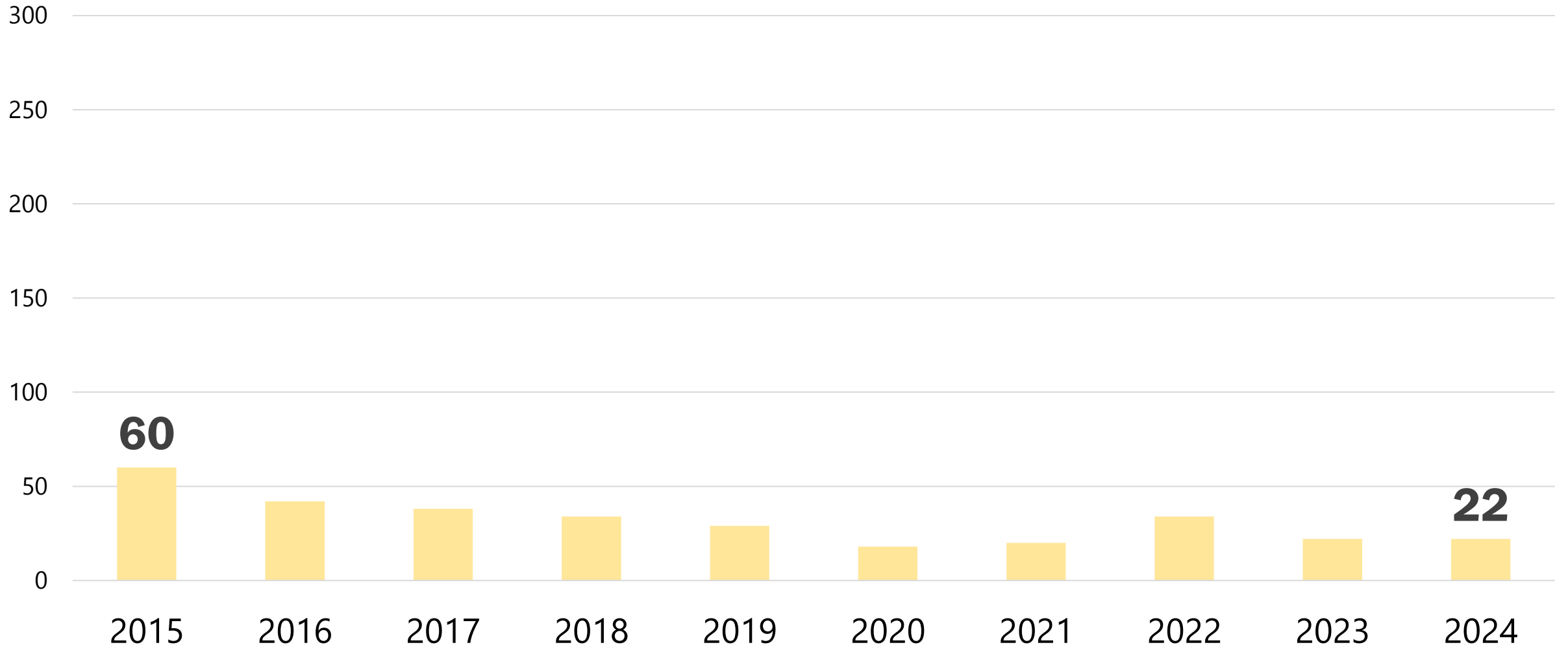
# Burglary – Orange County Sheriff

Burglary incidents, 2015-2024



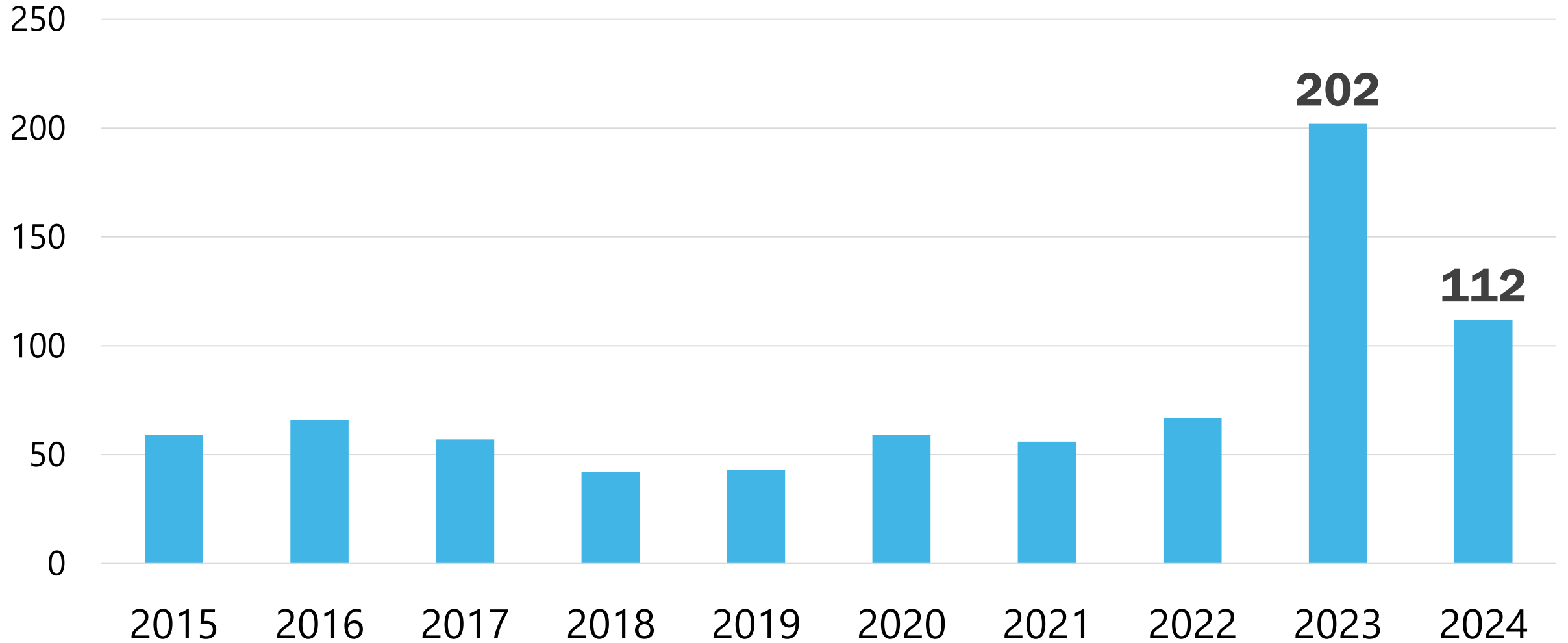
# Burglary – Hillsborough Police Department

Burglary incidents, 2010-2024



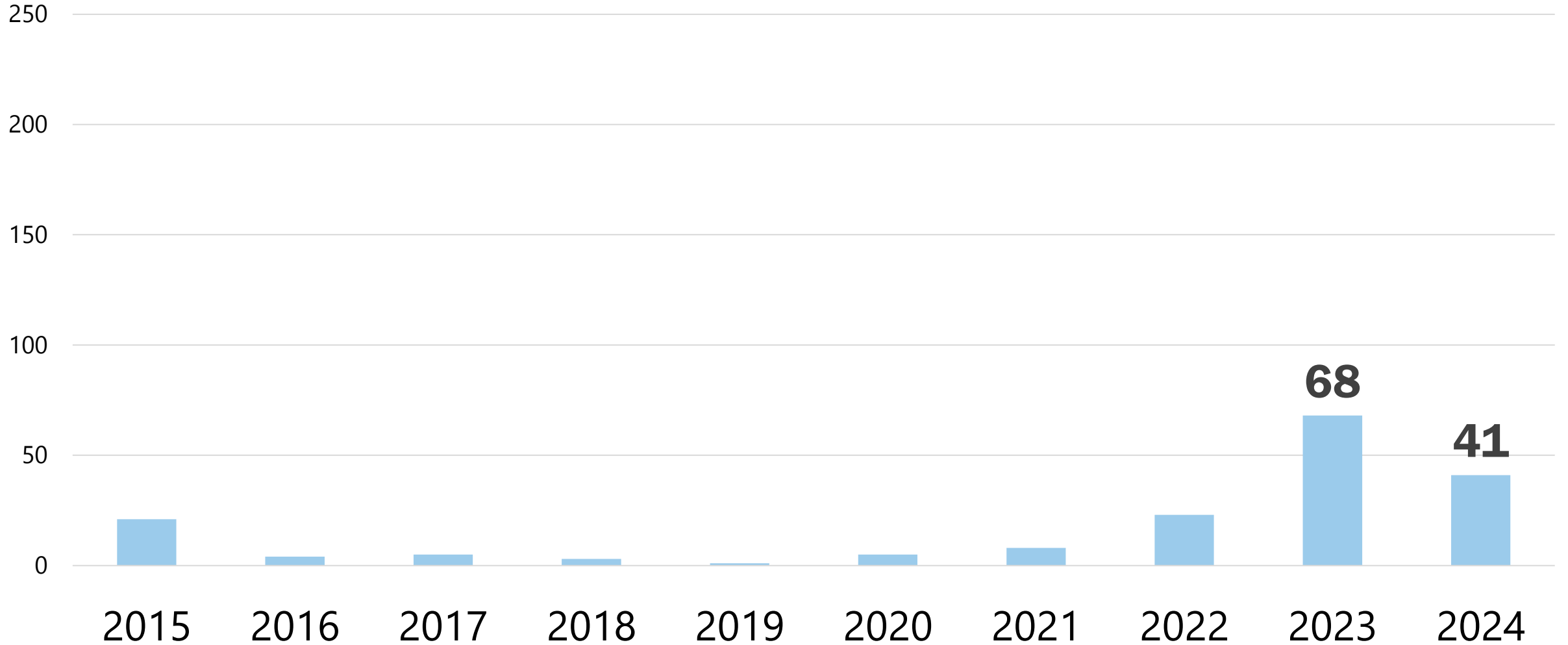
# Motor Vehicle Theft – Chapel Hill Police Department

Motor vehicle theft incidents, 2010-2024



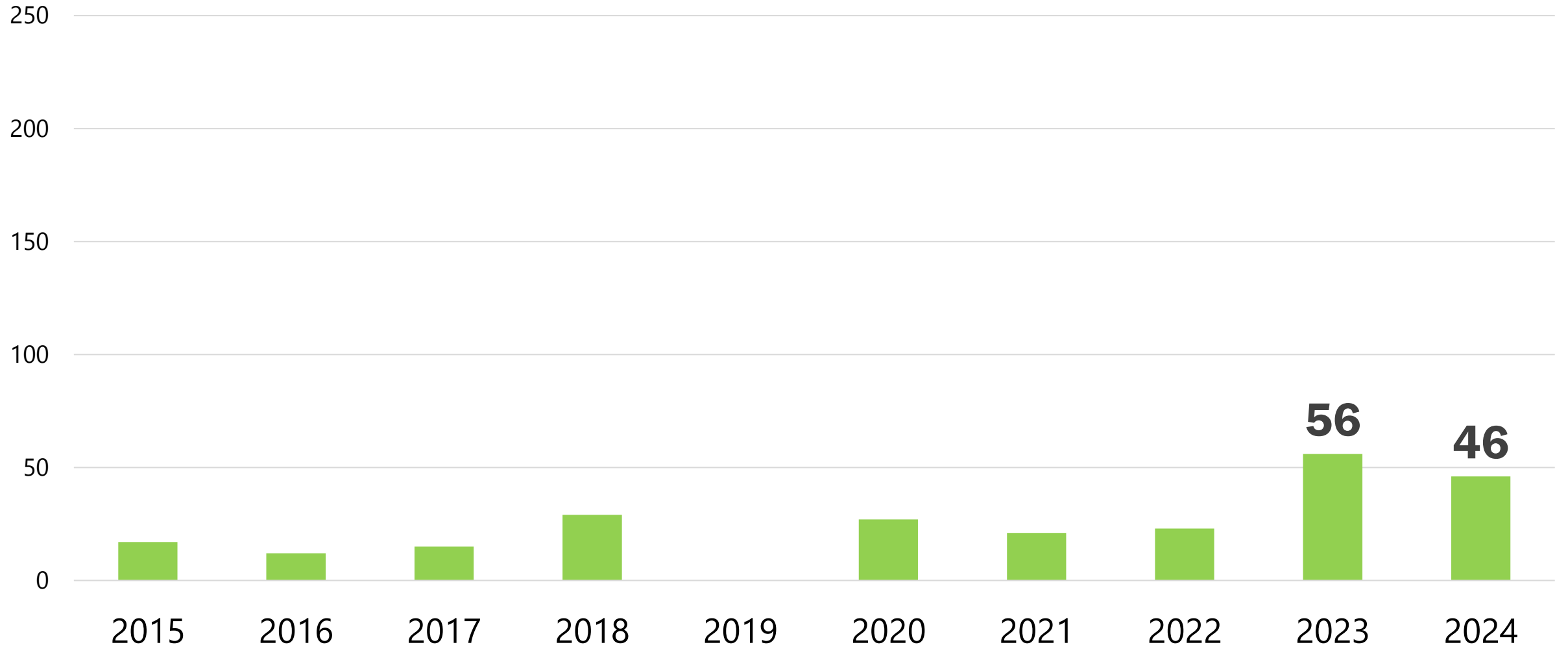
# Motor Vehicle Theft – UNC Chapel Hill PD

Motor vehicle theft incidents, 2010-2024



# Motor Vehicle Theft – Carrboro Police Department

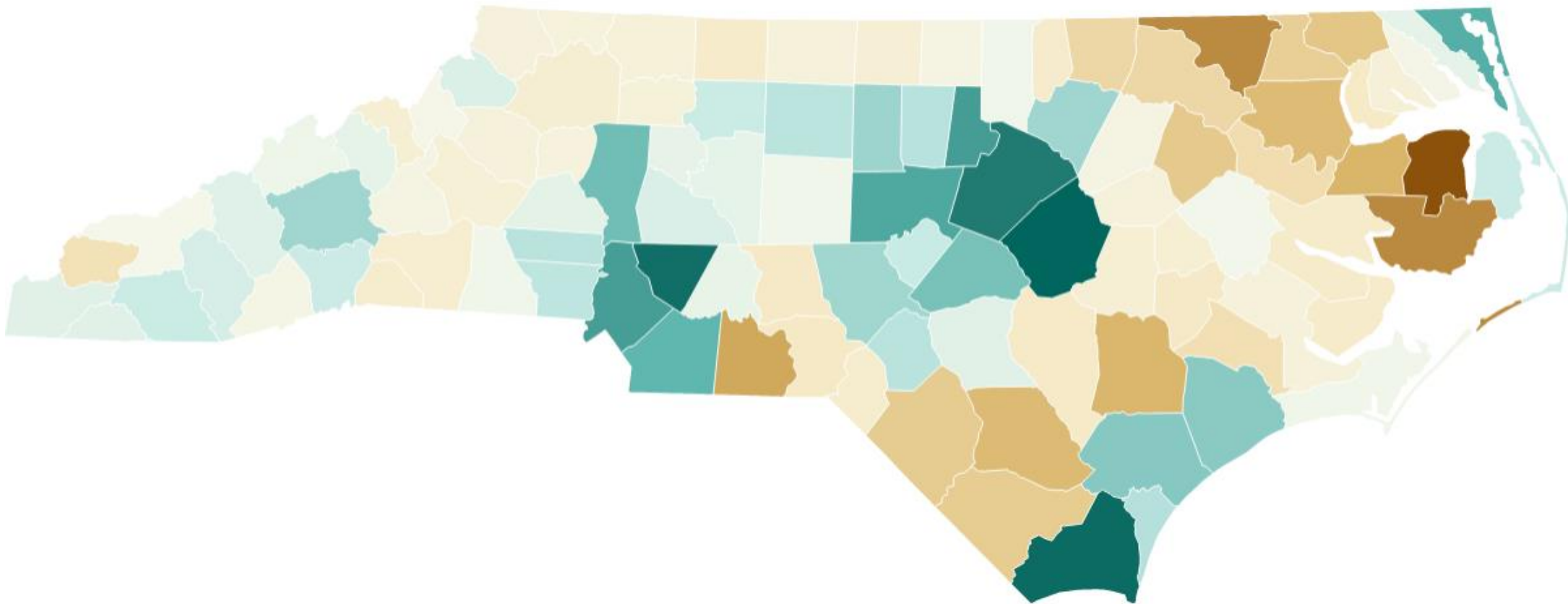
Motor vehicle theft incidents, 2010-2024



# Demographics: Population

# Population Increase and Decrease Across NC Counties

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



Source: US Census Bureau

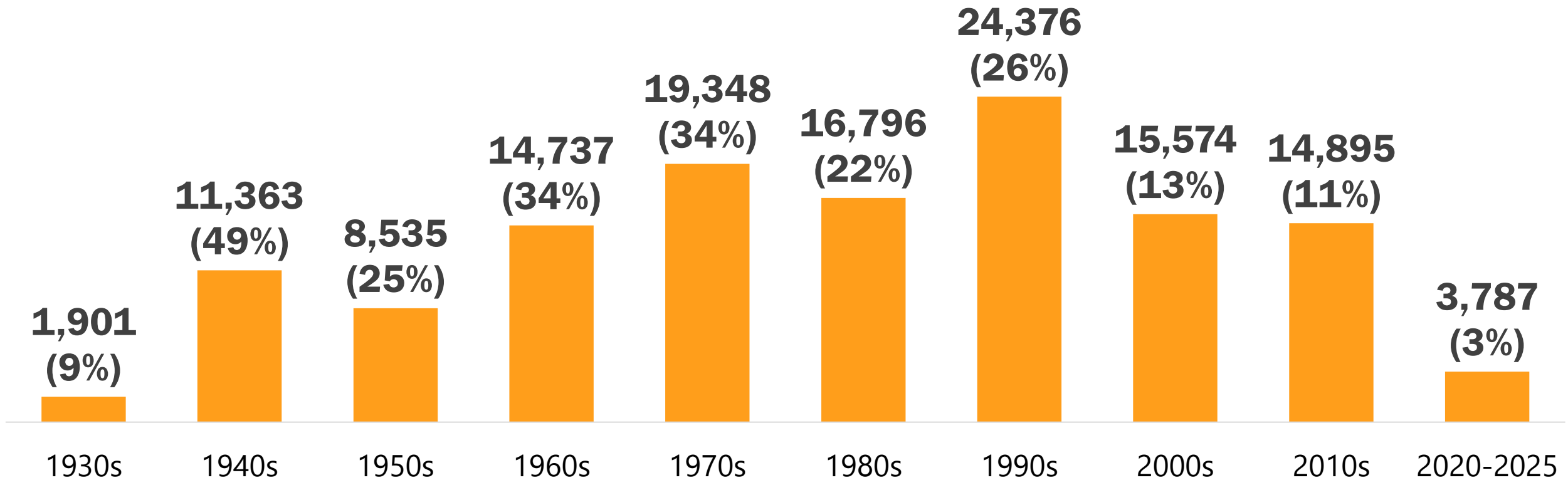
# Decennial Populations and Growth Rate

Comparing 2020 Decennial Census with 2025 Census PEP estimated populations

	2020	2025	Percent Growth 2020 to 2025	Annual Growth Rate
Orange County	148,711	152,498	2.4%	0.5%
Hillsborough	9,660	9,778	1.2%	0.2%
Carrboro	21,295	20,962	-1.6%	-0.3%
Chapel Hill	61,960	63,565	2.6%	0.5%
Chatham County	76,258	85,111	11.6%	2.2%
North Carolina	10,441,392	11,197,968	6.0%	1.4%

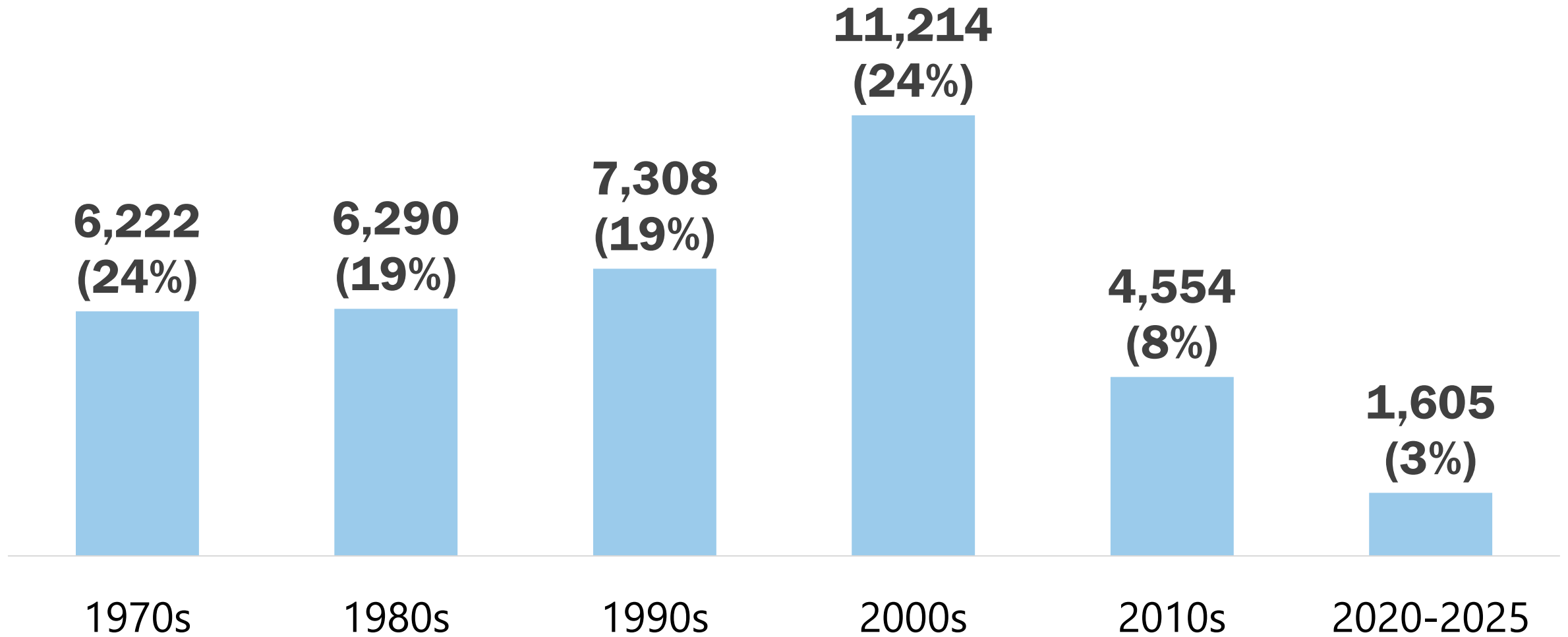
# Population Growth By Decade: Orange County

Numeric population growth by decade, 1930 to 2025



# Population Growth By Decade: Chapel Hill

Numeric population growth by decade, 1970 to 2025

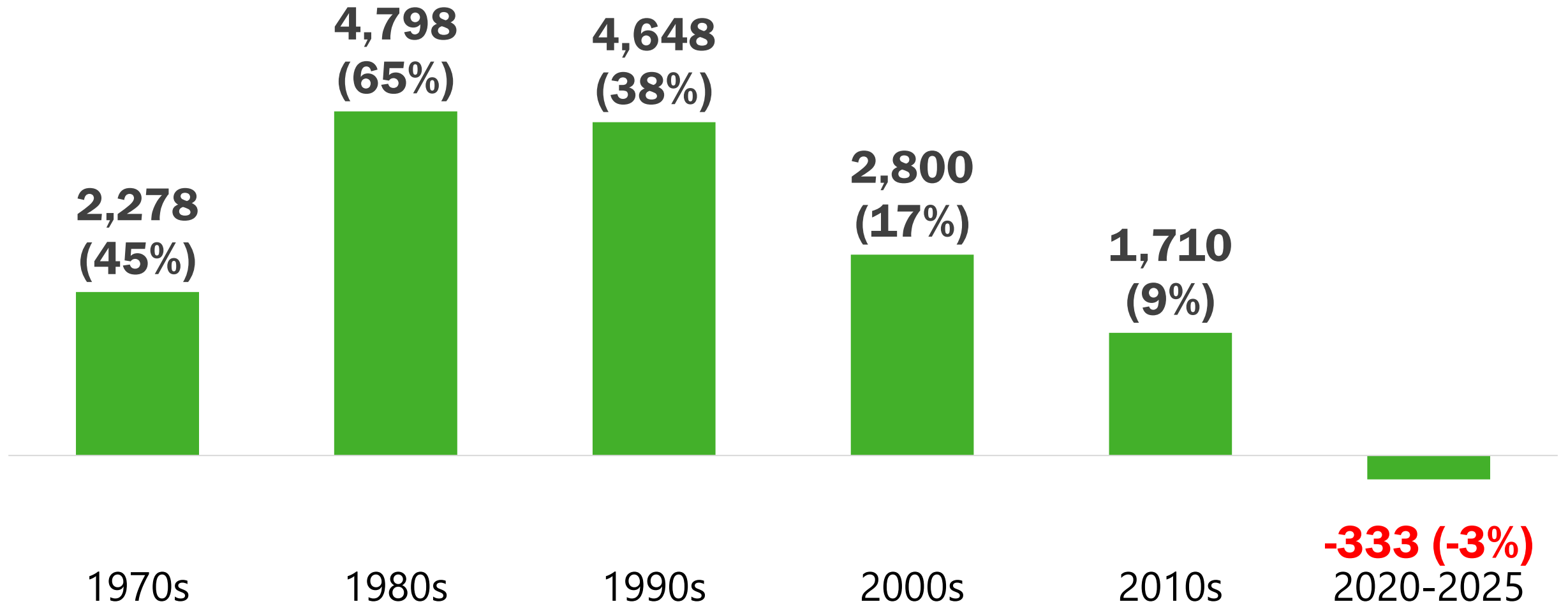


\*42% of town growth in 2000s was due to annexation

Source: US Census Bureau Decennial Census

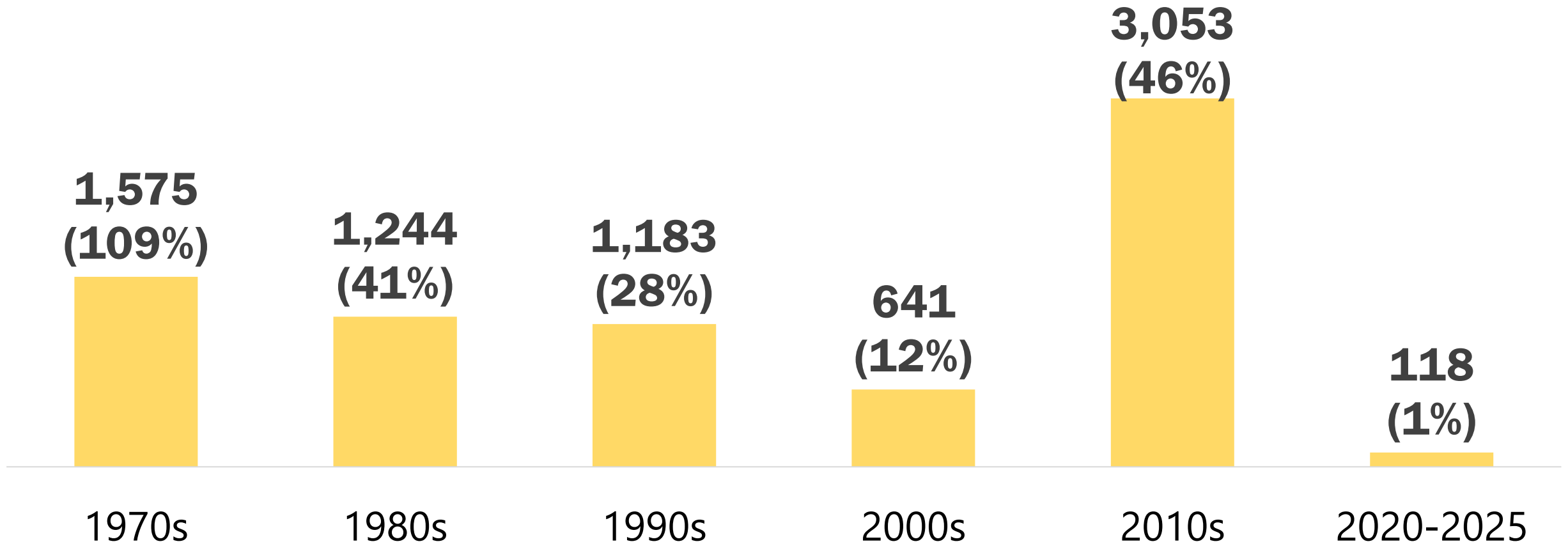
# Population Growth By Decade: Carrboro

Numeric population growth by decade, 1970 to 2025



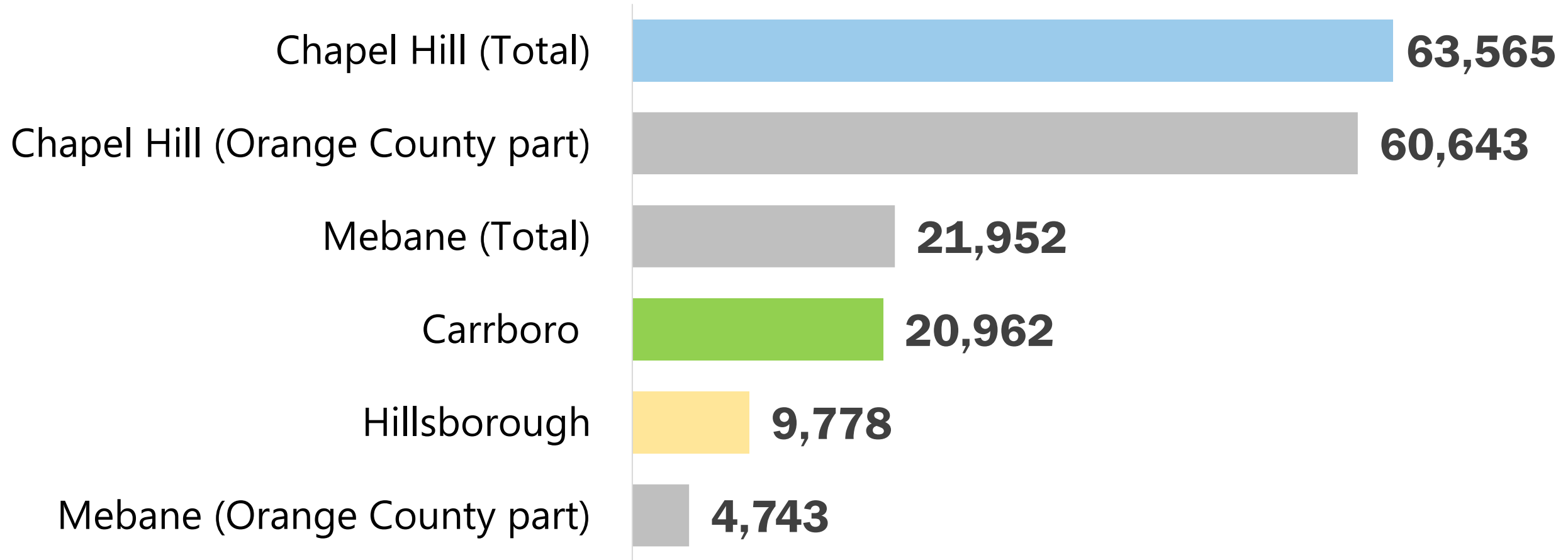
# Population Growth By Decade: Hillsborough

Numeric population growth by decade, 1970 to 2025



# Local Municipal Populations

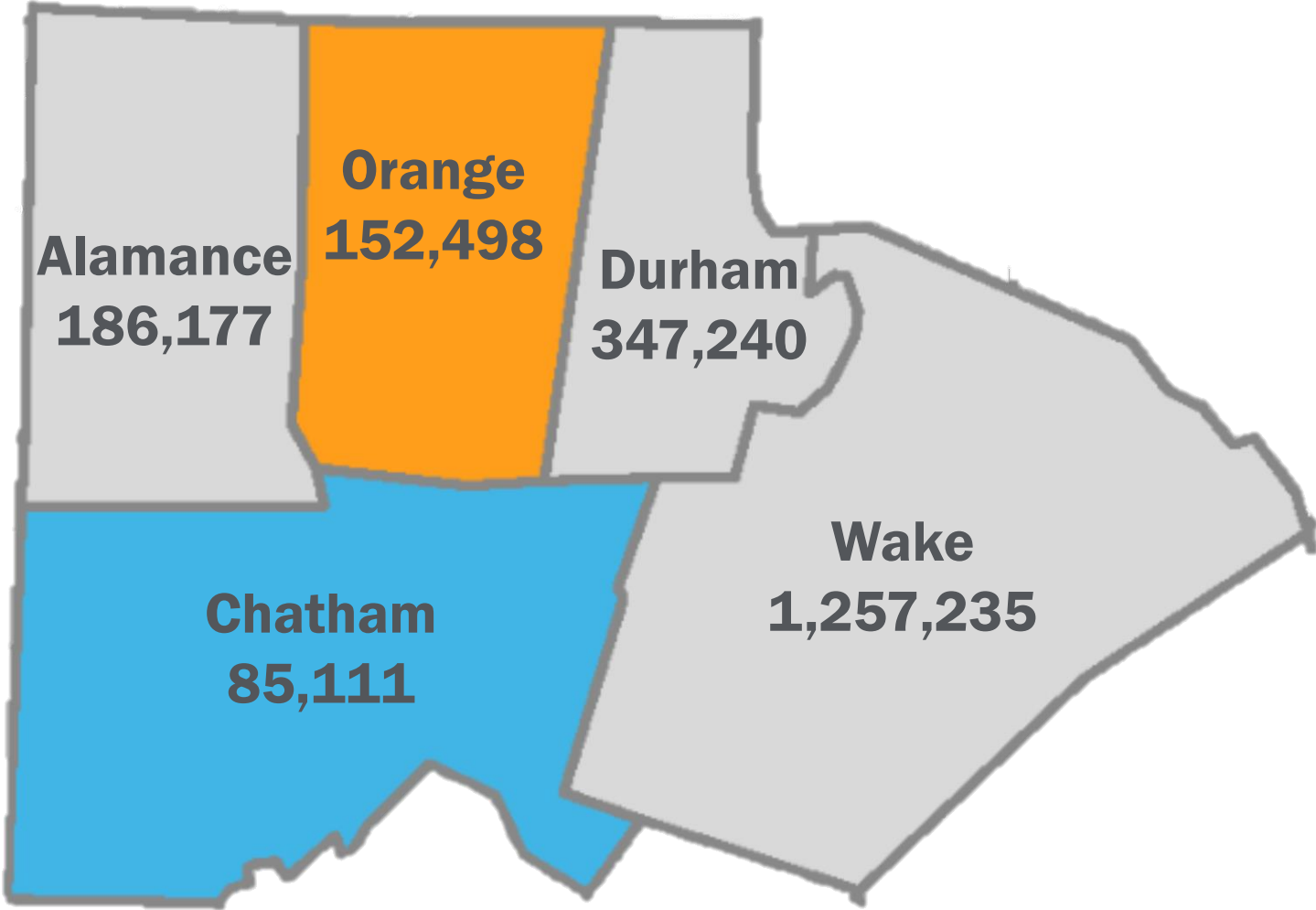
Population of local municipalities, 2025



Source: Decennial Census and Census Population Estimates

# 2025 County Population Totals

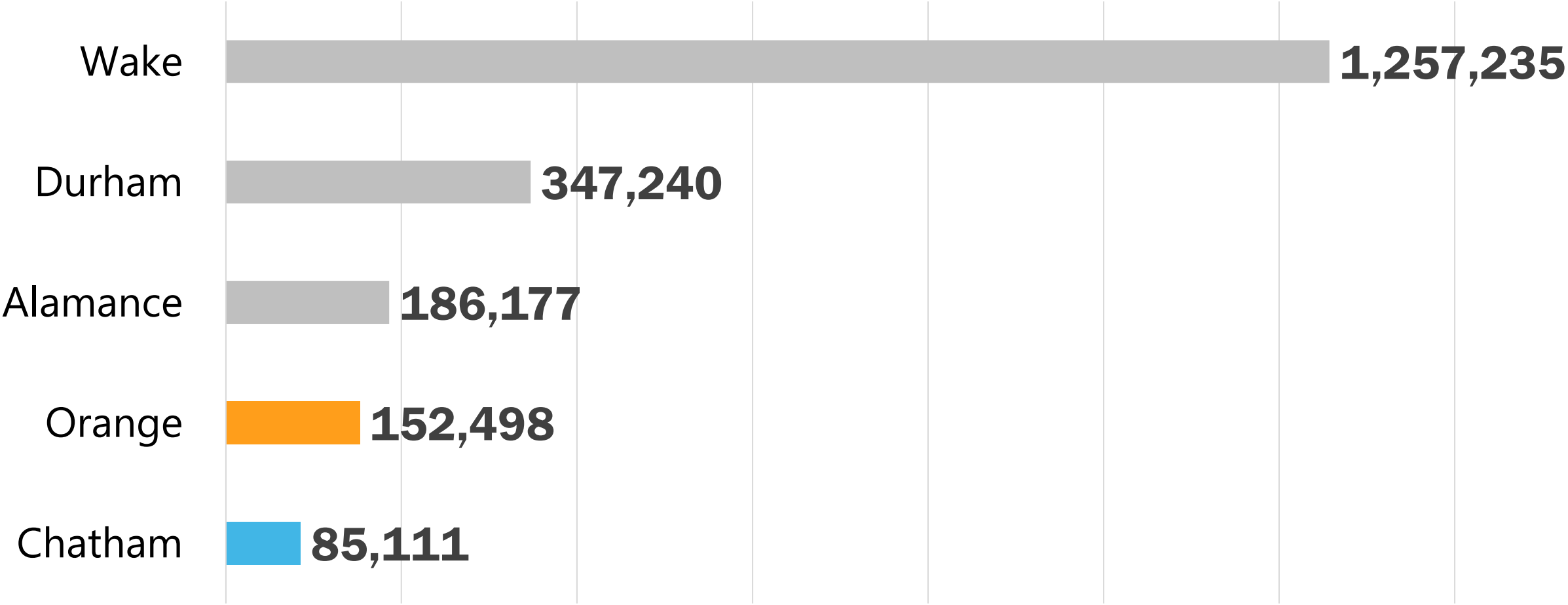
North Carolina population: 11,197,968



Source: Decennial Census and Census Population Estimates

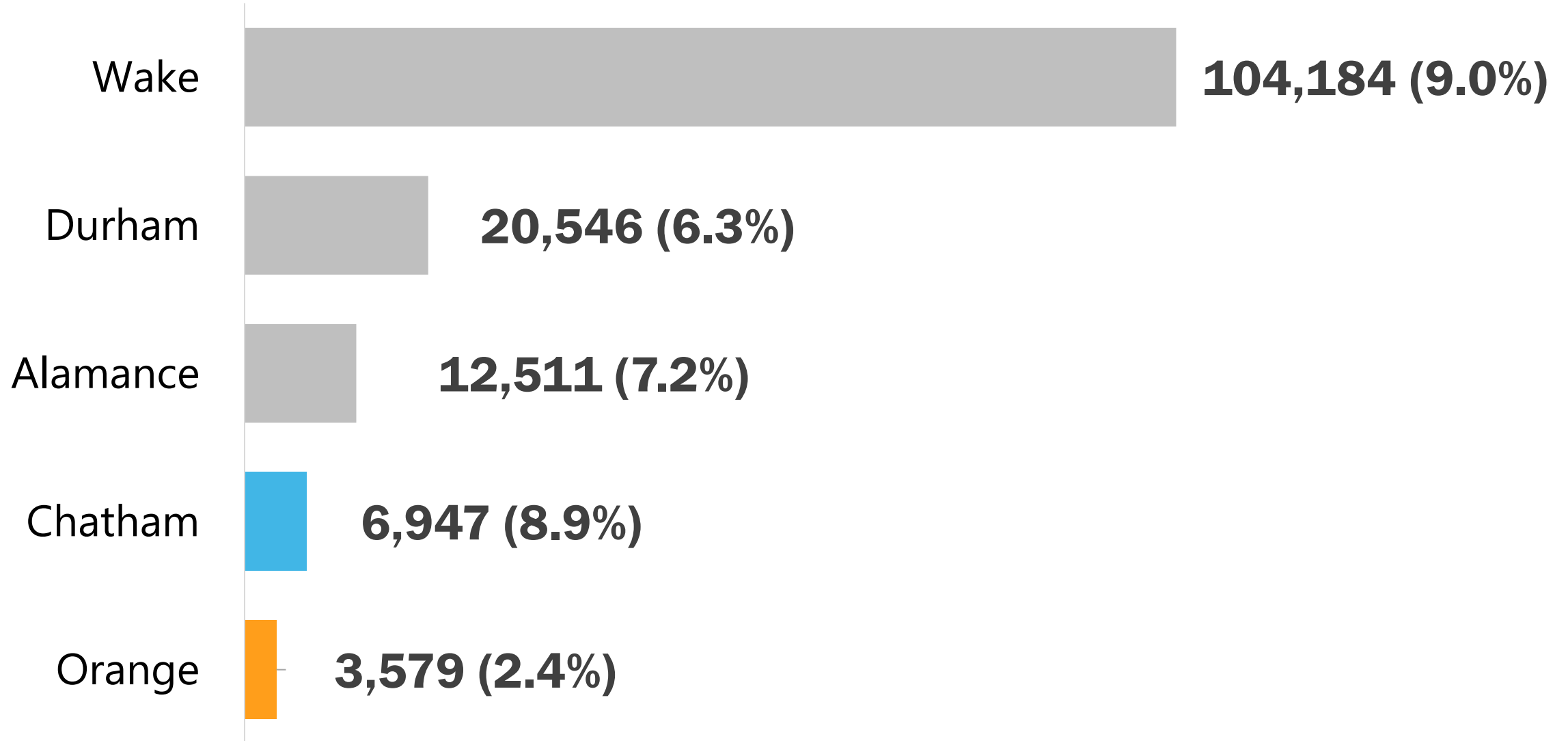
# 2025 County Population Totals

North Carolina population: 11,197,968



Source: Decennial Census and Census Population Estimates

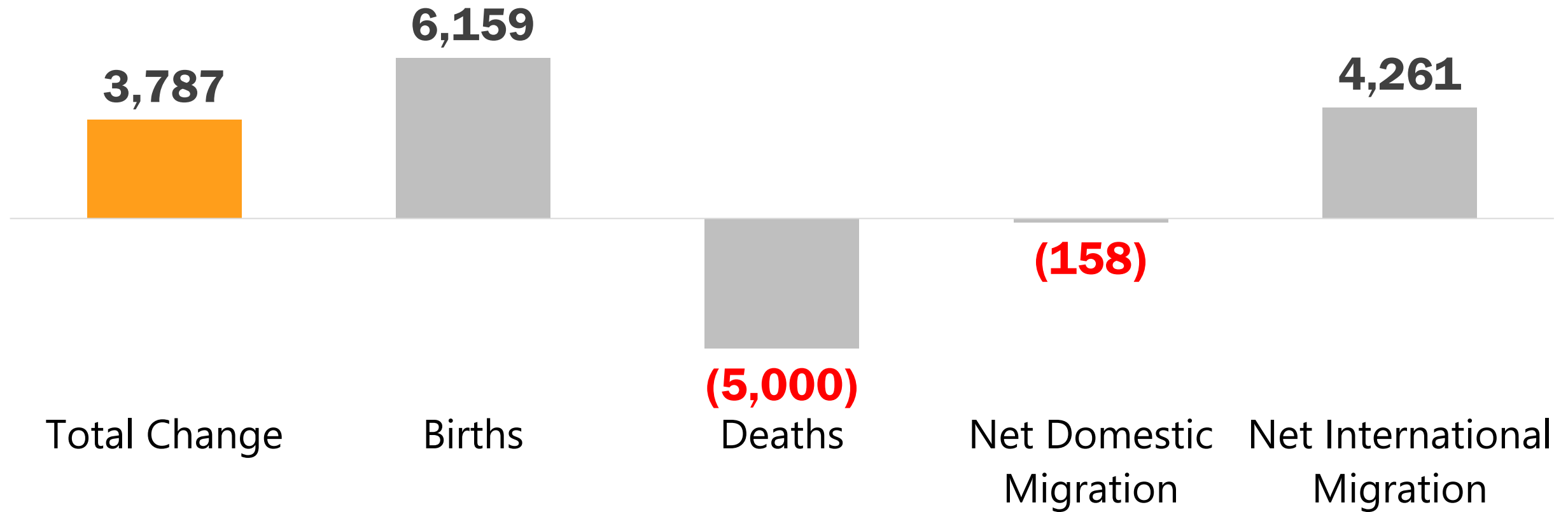
# County Population Change, 2021 to 2025



Source: Decennial Census and Census Population Estimates

# Orange County Components of Population Change

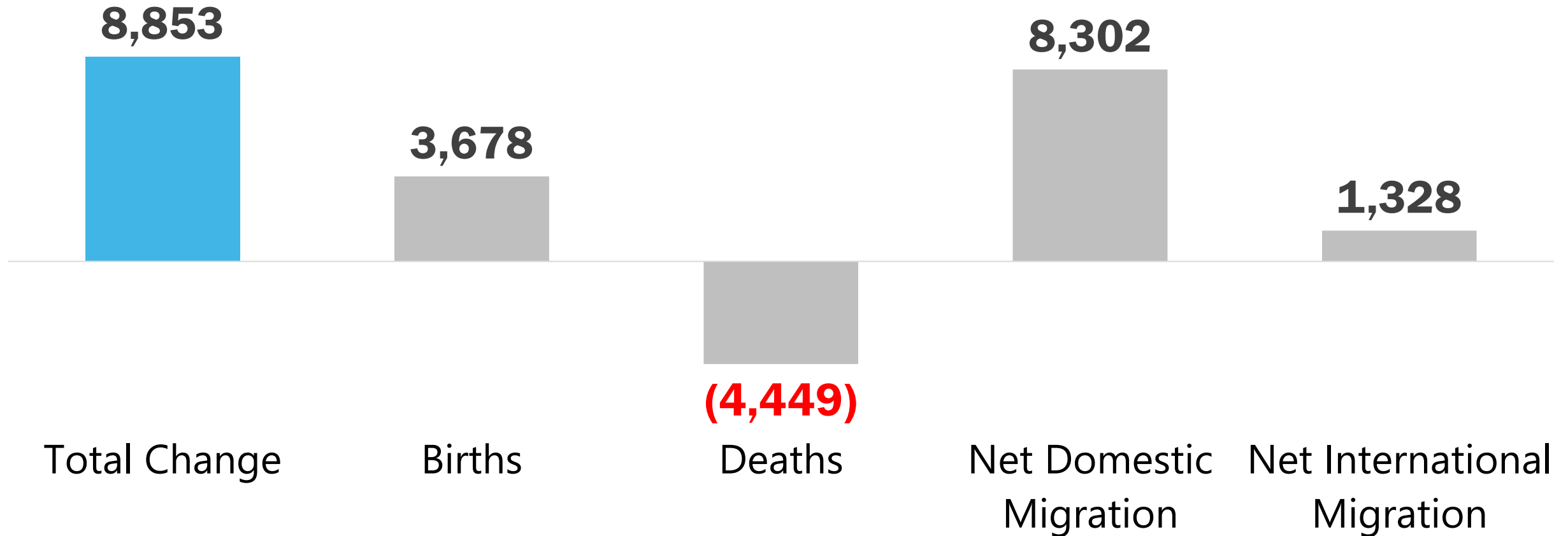
Components of Orange County's population change, from 2020 to 2025



Source: US Census Bureau Population Estimates

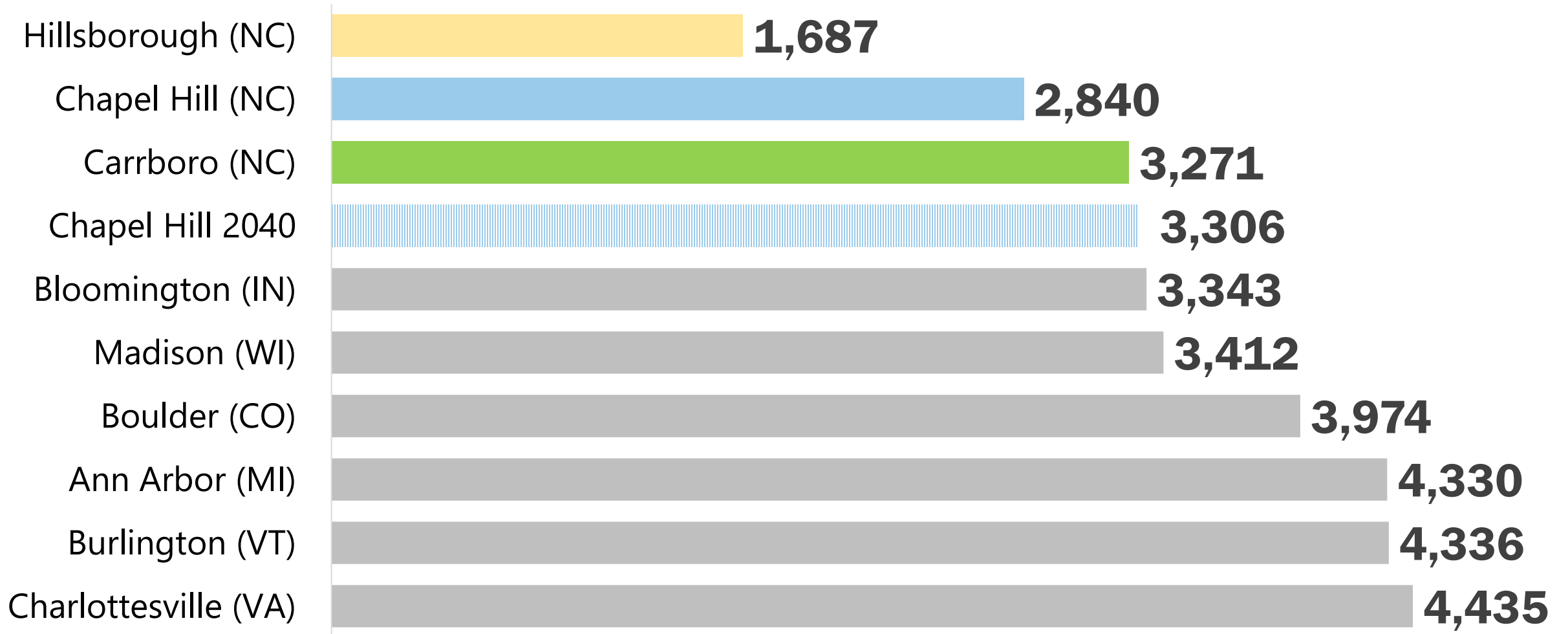
# Chatham County Components of Population Change

Components of Chatham County's population change, from 2020 to 2025



# Population Density

Population per square mile of peer cities and neighbors



Source: American Community Survey (2020-2024 5-Year Estimates)

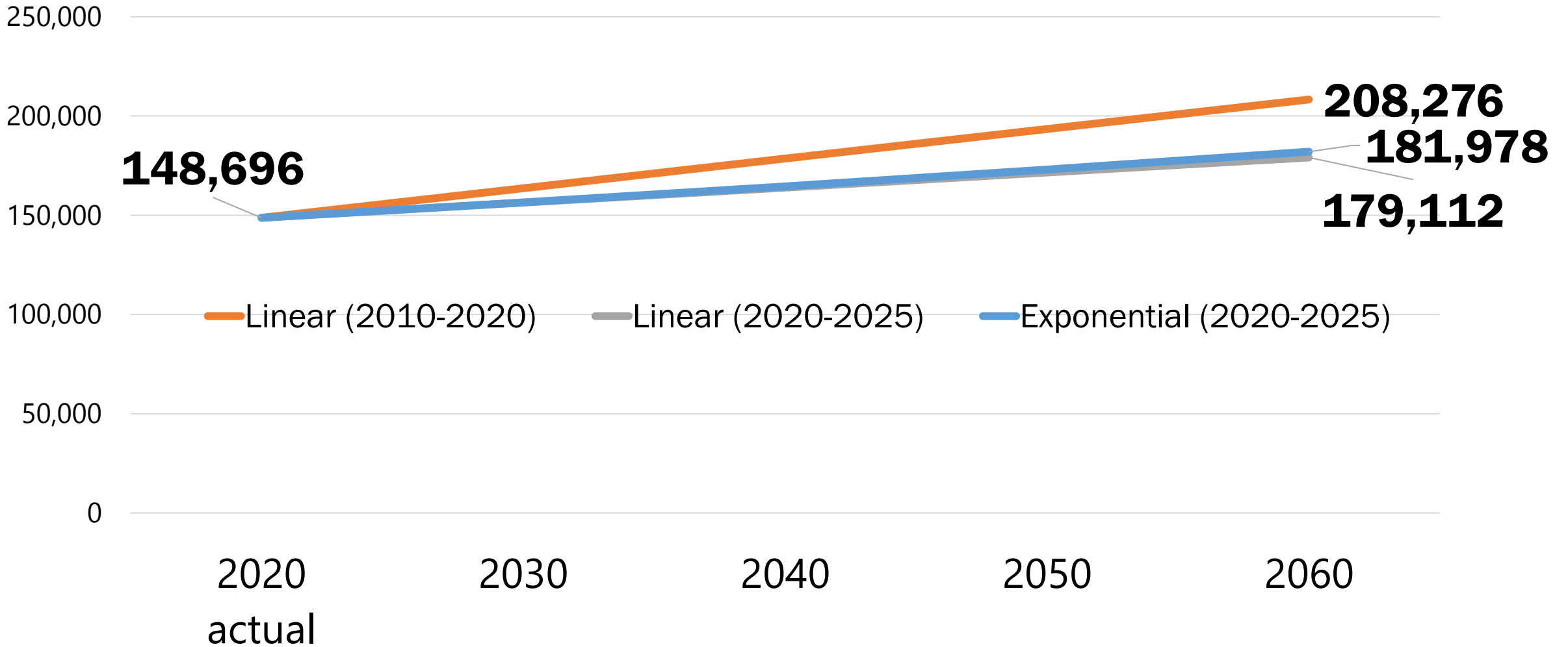
# Three Models for Projecting Growth

	Linear (2010-2020)	Linear (2020-2025)	Exponential (2020-2025)
Orange County	1,241 ppy	760 ppy	0.5%
Carrboro	121 ppy	67 ppy	0.32%
Chapel Hill	473 ppy	321 ppy	0.51%
Hillsborough	357 ppy	24 ppy	0.24%
Chatham County	1,278 ppy	1,765 ppy	2.19%

Source: Decennial Census

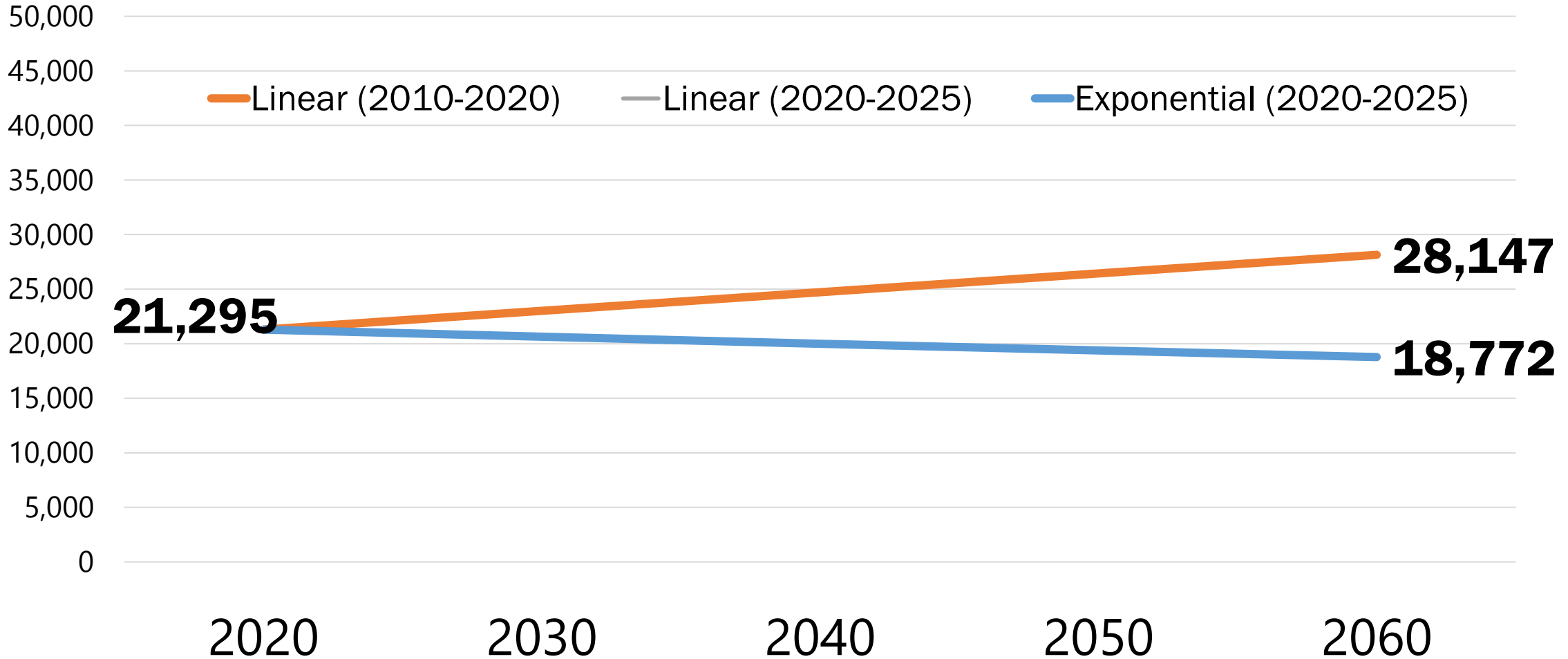
# Orange County Population Projections

Linear (2010-2020) projects population growth at a rate of 1,241 people per year; Linear (2020-2025) projects population growth of 760 per year; Exponential (2020-2025) projects population growth of 0.5% per year, compounding.



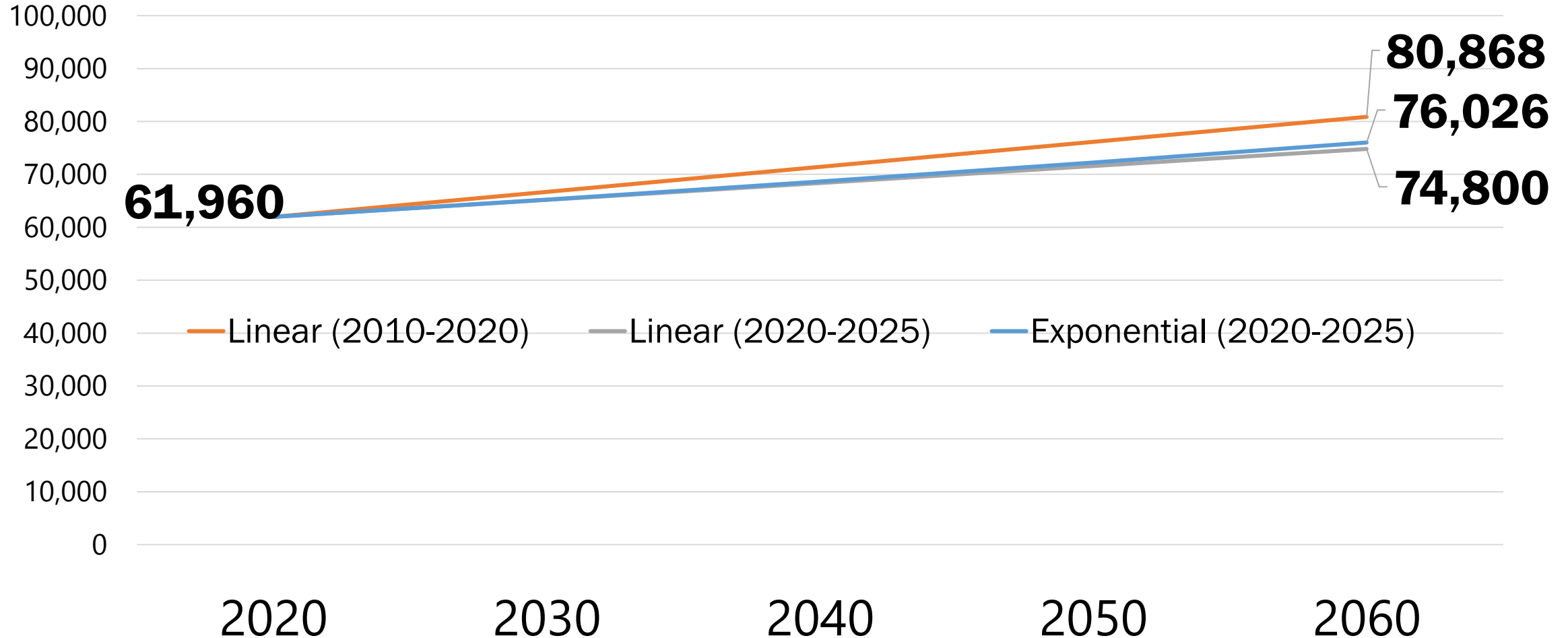
# Carrboro Population Projections

Linear (2010-2020) projects population growth at a rate of 171 people per year; Linear (2020-2025) projects population growth of 67 per year; Exponential (2020-2025) projects population growth of 0.32% per year, compounding.



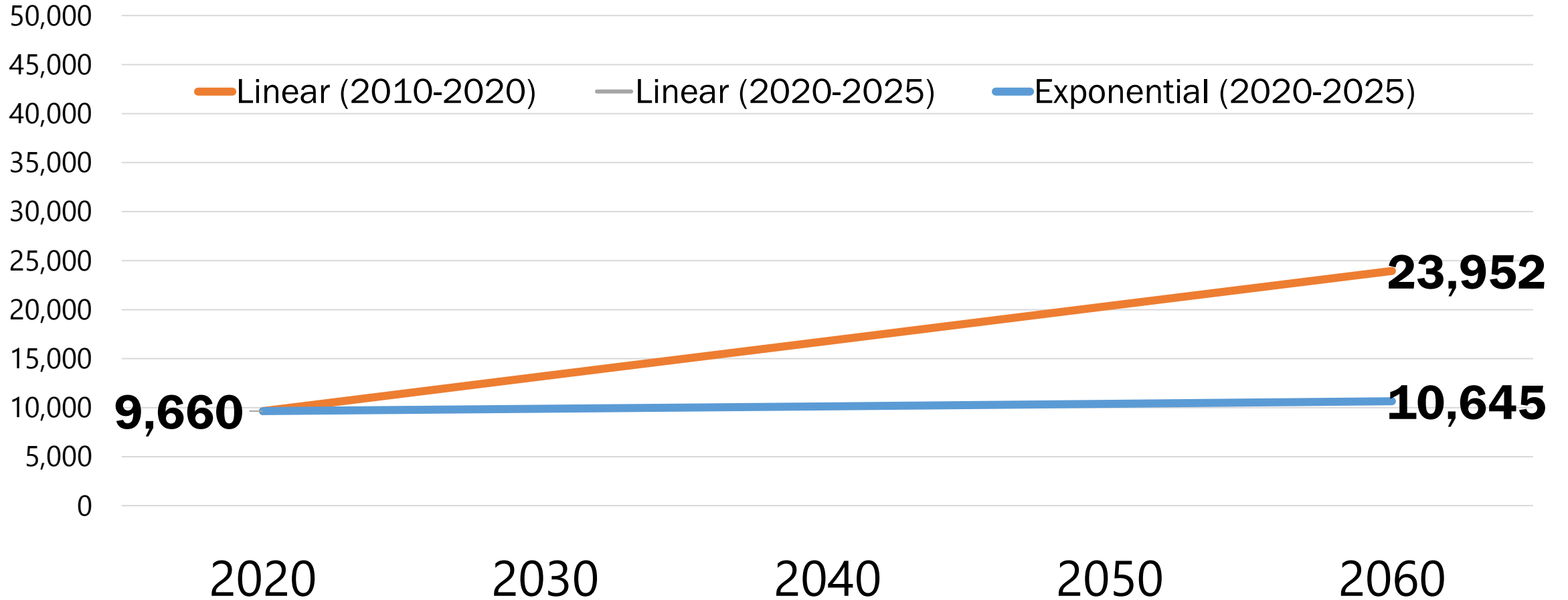
# Chapel Hill Population Projections

Linear (2010-2020) projects population growth at a rate of 473 people per year; Linear (2020-2025) projects population growth of 321 per year; Exponential (2020-2025) projects population growth of 0.51% per year, compounding.



# Hillsborough Population Projections

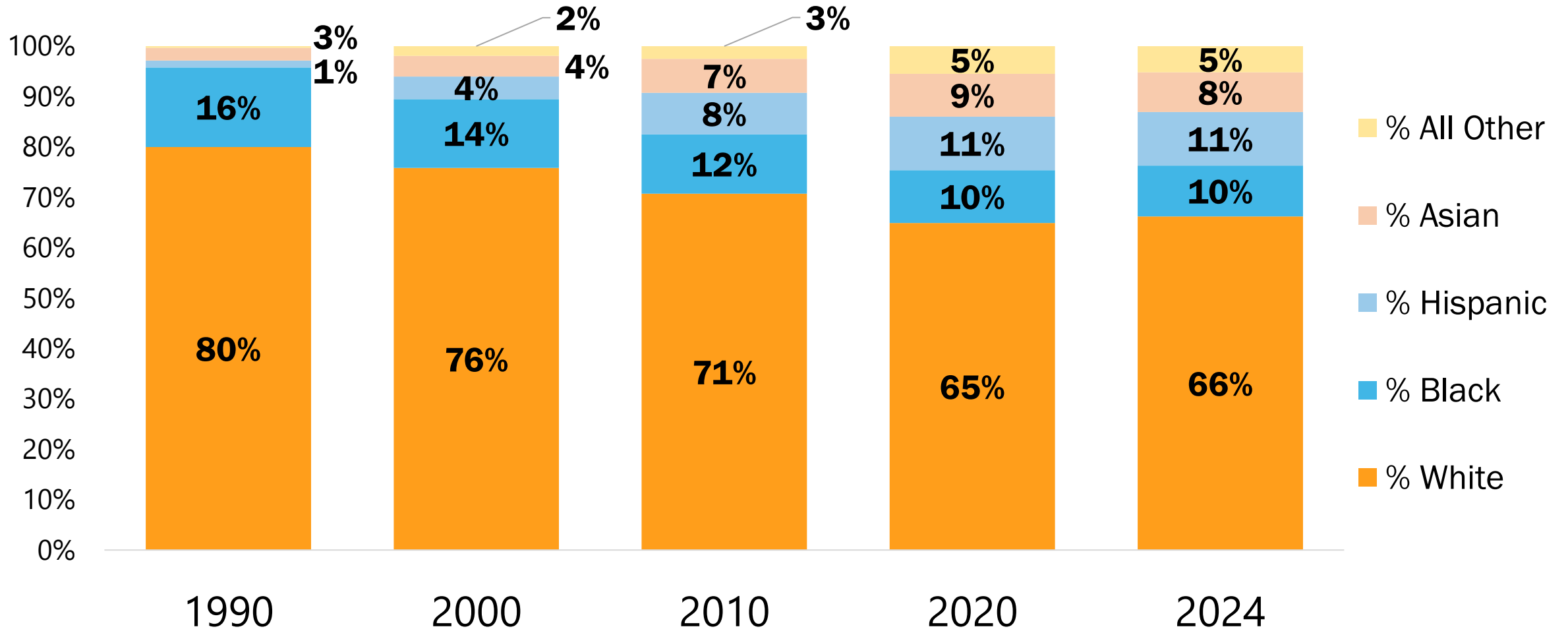
Linear (2010-2020) projects population growth at a rate of 357 people per year; Linear (2020-2025) projects population growth of 24 per year; Exponential (2020-2025) projects population growth of 0.24% per year, compounding.



# Demographics: Race/Ethnicity

# Orange County Population by Race/Ethnicity

Population demography by decade and 2024 estimates

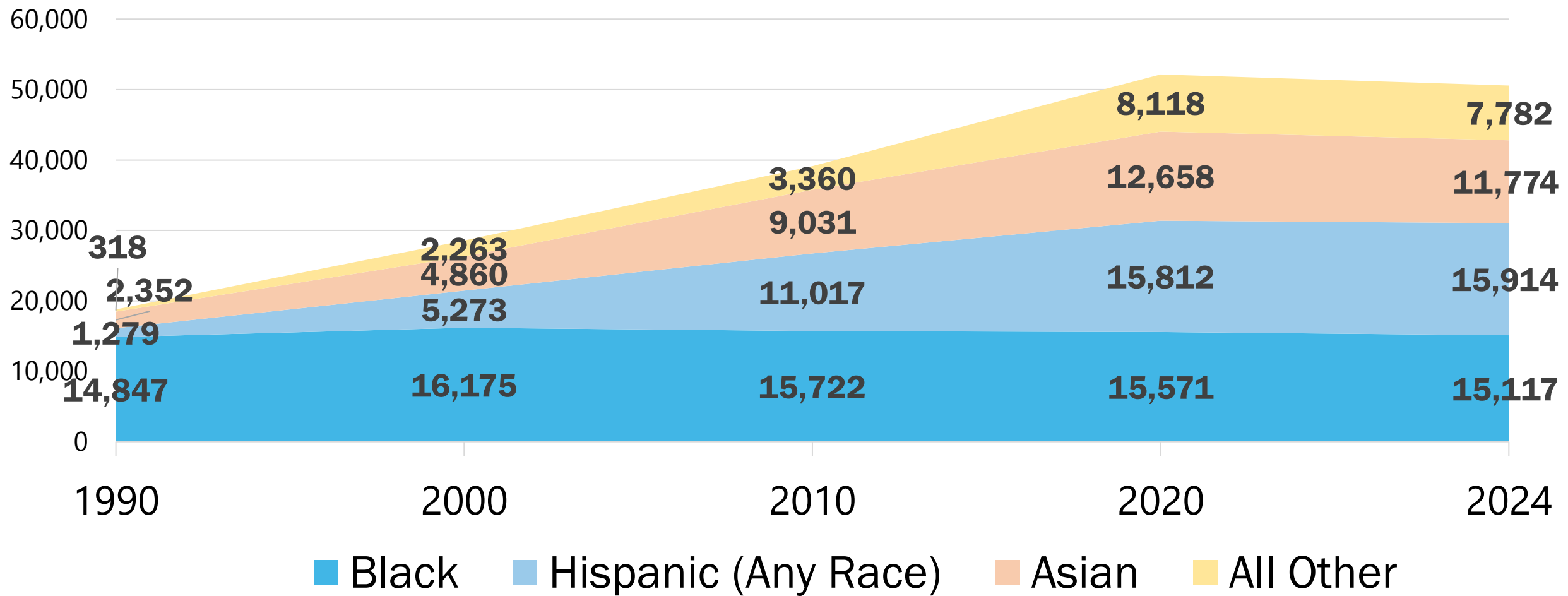


Note: "All Other" includes American Indian, other races, and multiracial. The Census changed its way of measuring race/ethnicity in the 2020 Census.

Source: American Community Survey 2024 Estimates

# Orange County Population by Race/Ethnicity

Orange County minority racial makeup by decade and current 2024 estimates

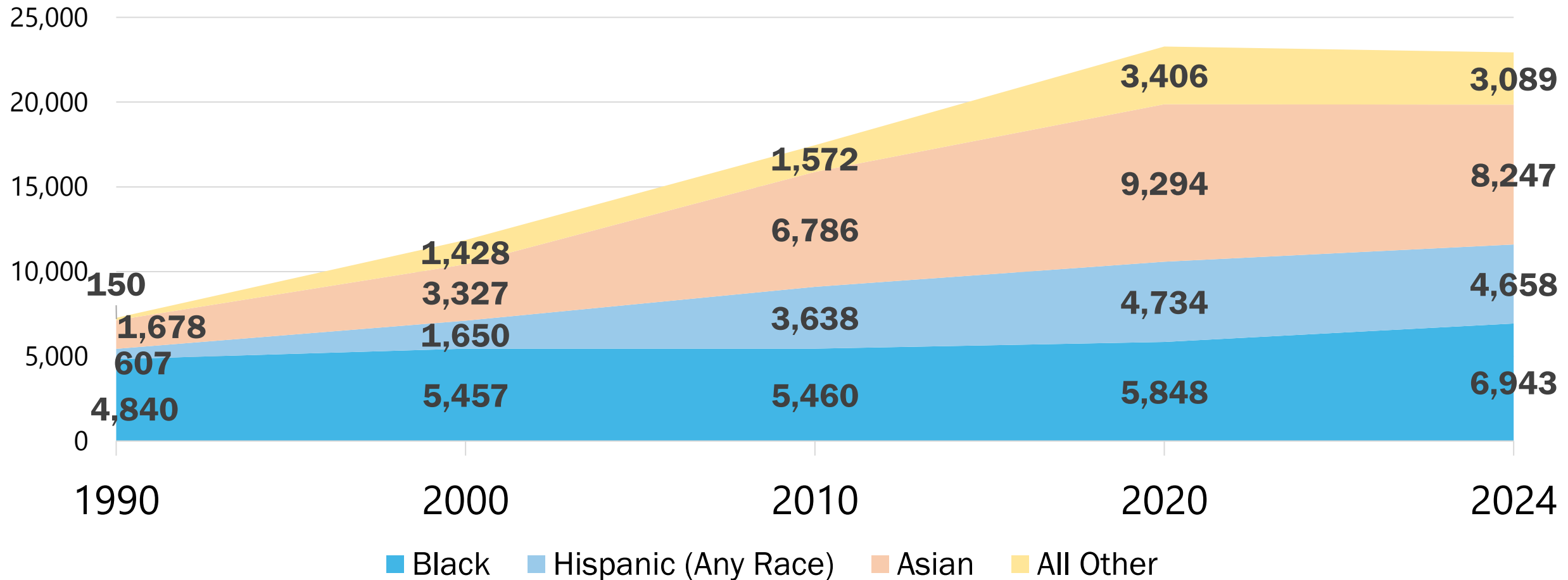


Note: "All Other" includes American Indian, other races, and multiracial. The Census changed its way of measuring race/ethnicity in the 2020 Census.

Source: American Community Survey 2024 Estimates

# Chapel Hill Population by Race/Ethnicity

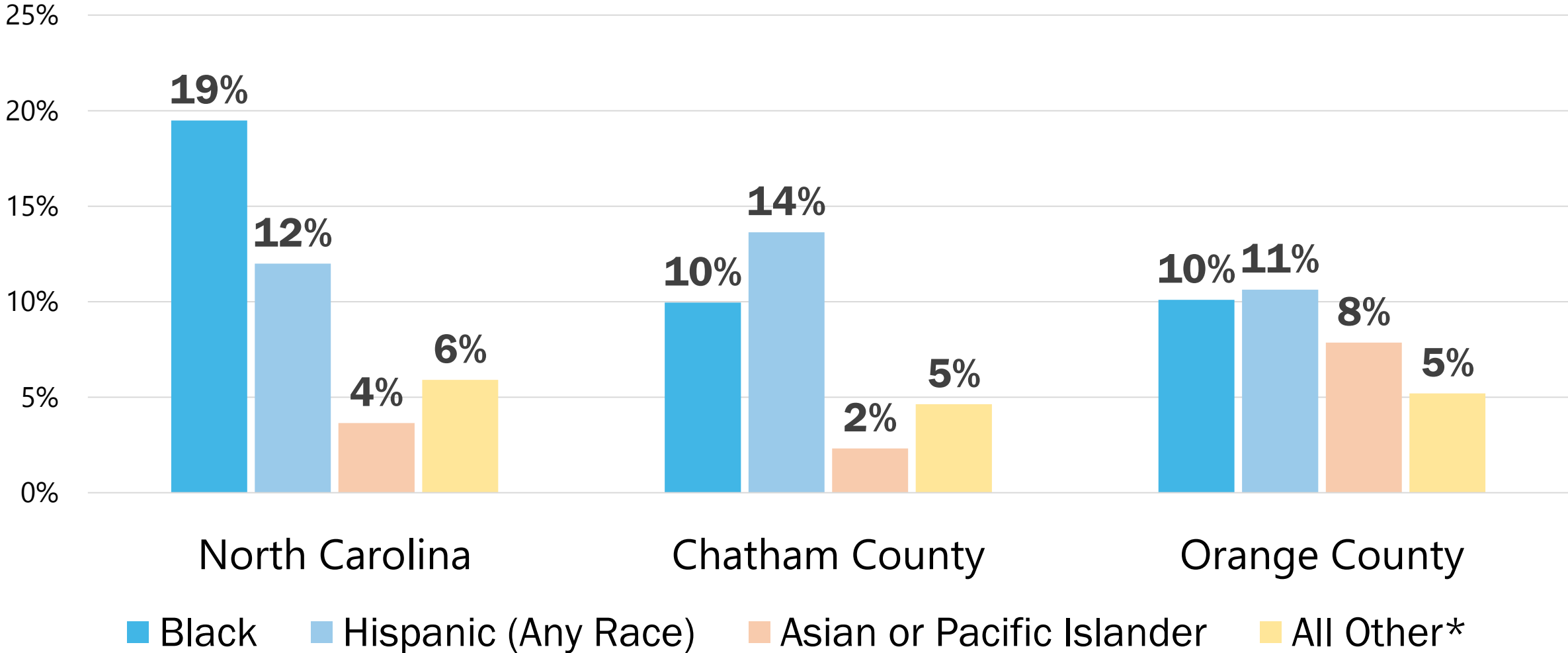
Chapel Hill non-white racial makeup by decade and current 2024 estimates



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

Source: American Community Survey 2024 Estimates

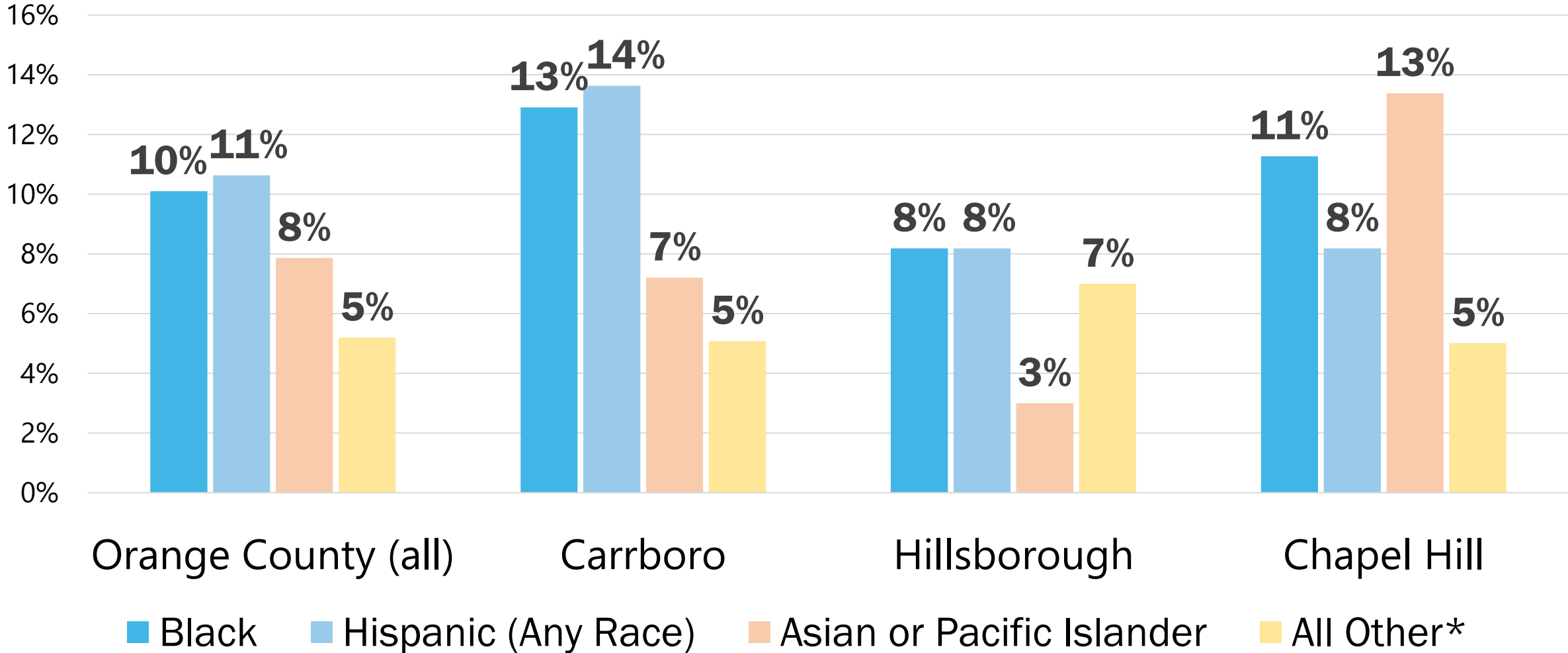
# 2024 State & County Minority Makeup



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

Source: American Community Survey 2024 Estimates

# 2024 Orange County & Municipality Minority Makeup



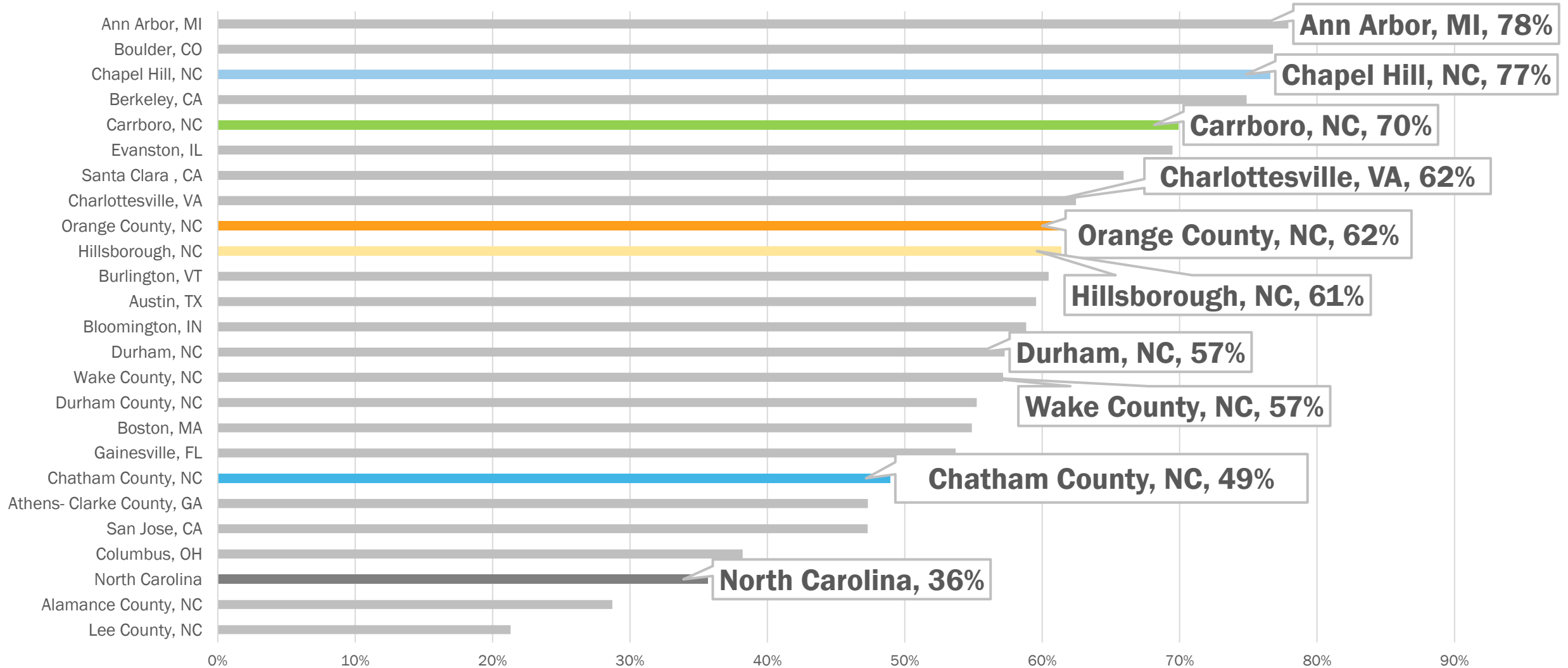
Note: "All Other" includes American Indian, other races, and multiracial. The Census changed its way of measuring race/ethnicity in the 2020 Census.

Source: American Community Survey 2024 Estimates

# Population: Age and Education

# Educational Attainment – Bachelor’s Degree

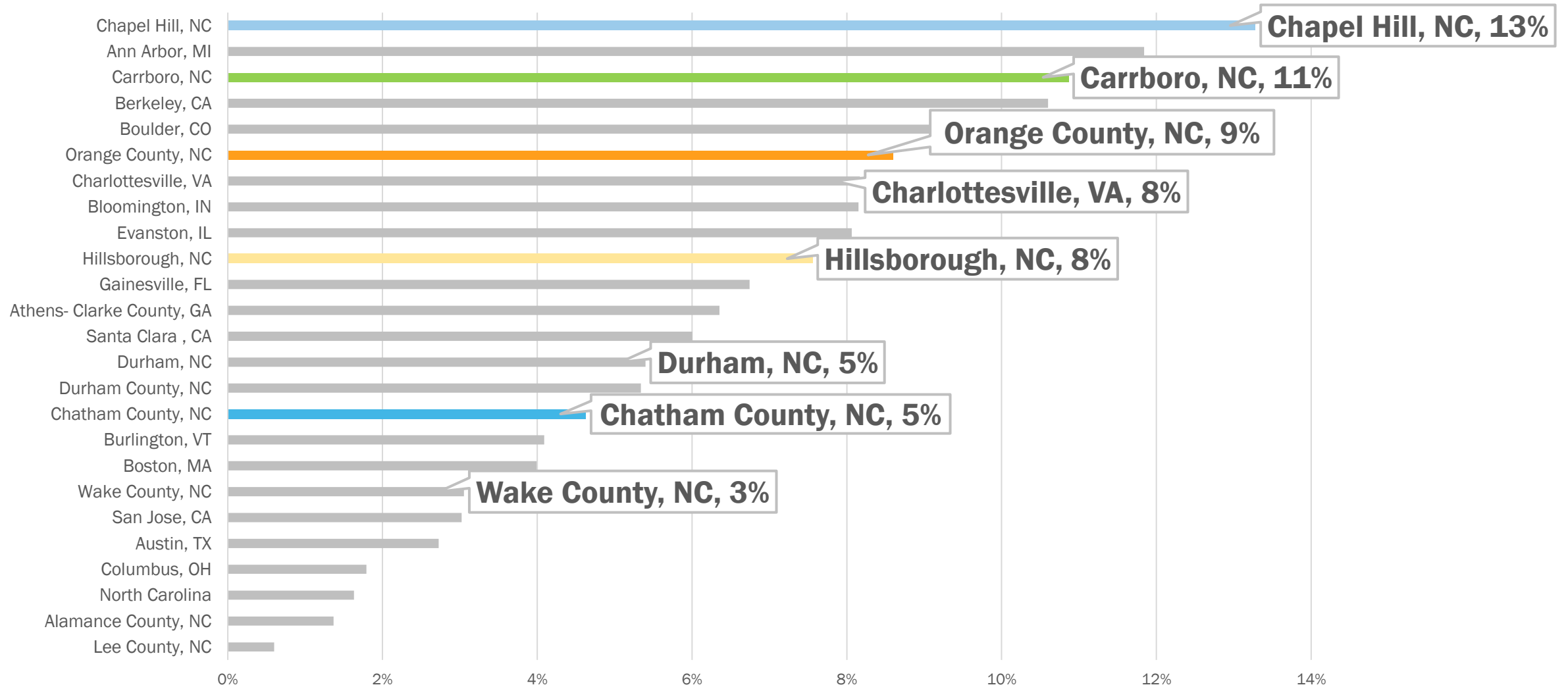
Percent of residents 25+ with a bachelor’s degree or higher, 2024



Source: American Community Survey (2020-2024 5-Year Estimates)

# Educational Attainment – Doctorate Degree

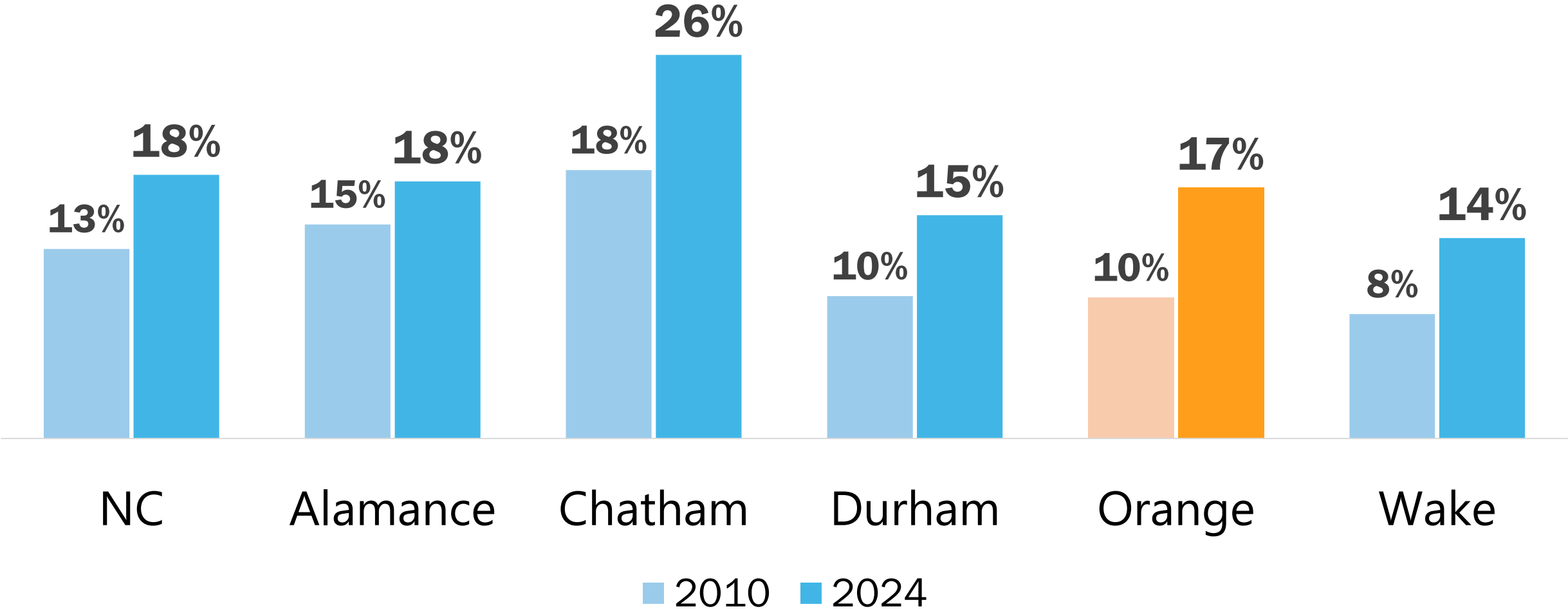
Percent of residents 25+ with a doctorate degree, 2024



Source: American Community Survey (2020-2024 5-Year Estimates)

# Share of Residents 65 Years and Older

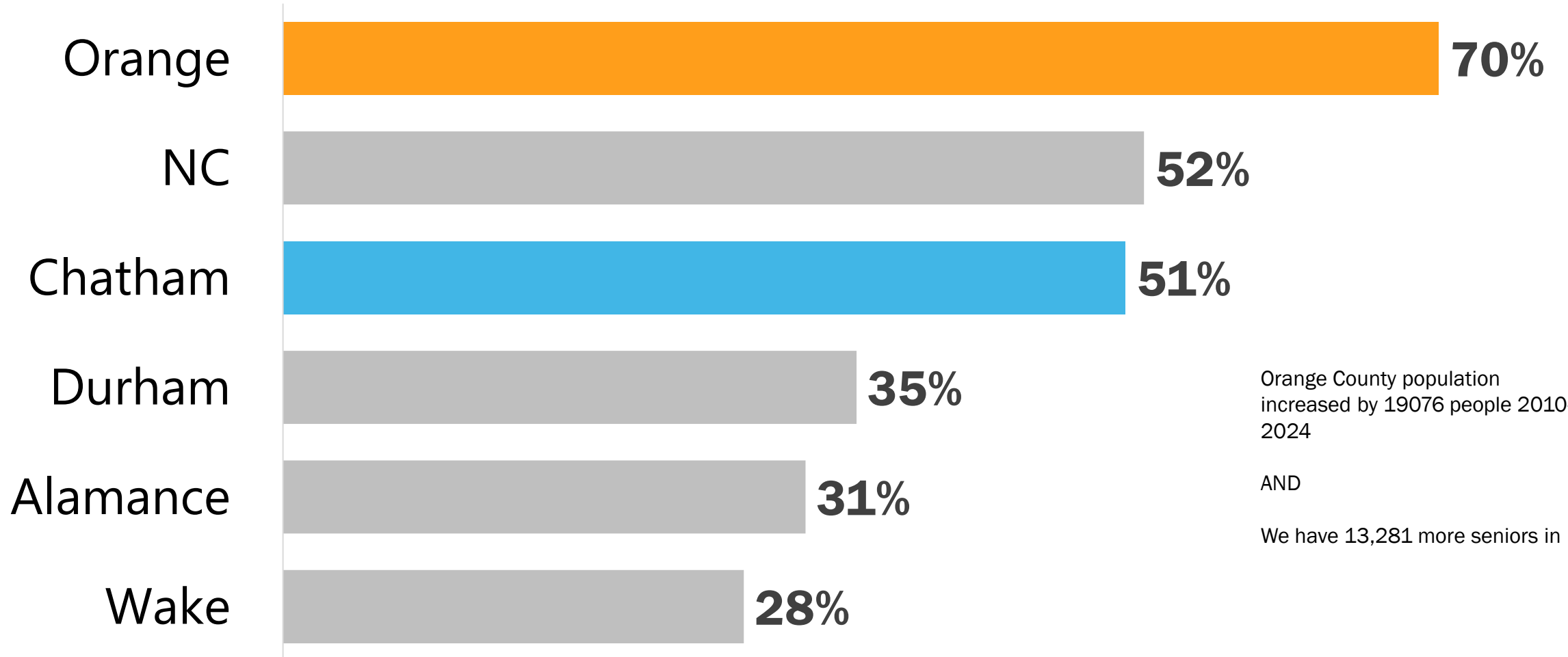
Population proportion 65+, April 1, 2010 vs. July 1, 2024



Source: US Census Bureau Population Estimates

# 65+ Population Growth as Percent of Total Population Growth

Share of 2010-2024 population growth due to increase of people 65+



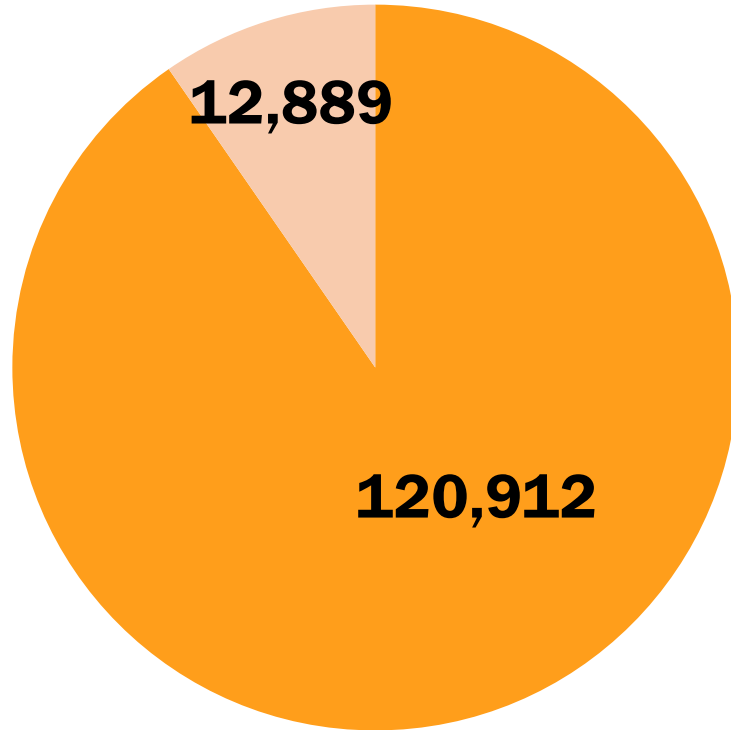
Orange County population increased by 19,076 people 2010-2024

AND

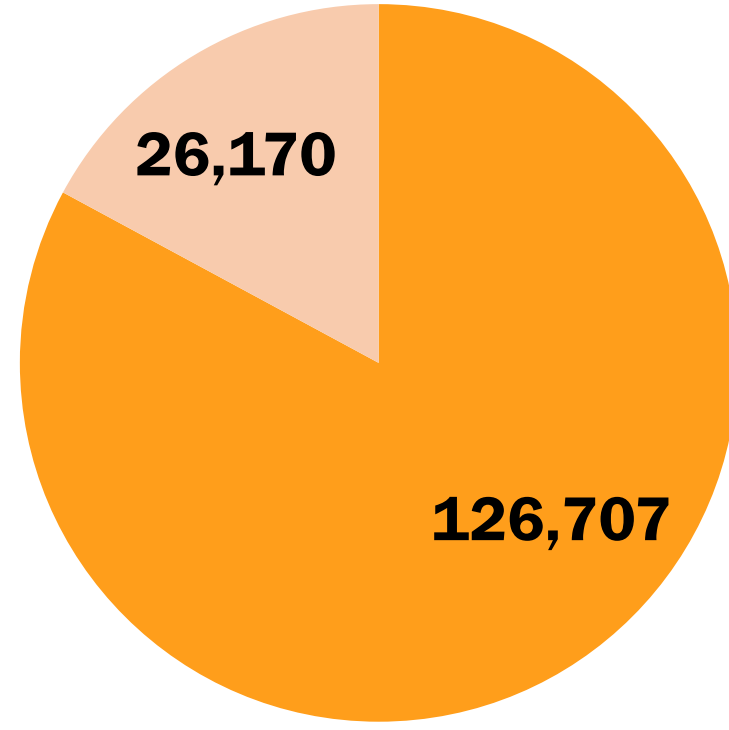
We have 13,281 more seniors in

# Population by Age Bands, 2010 vs. 2024

Orange County has 13,281 more seniors in 2024 (July 1) than 2010 (April 1) and 19,106 total additional residents



2010



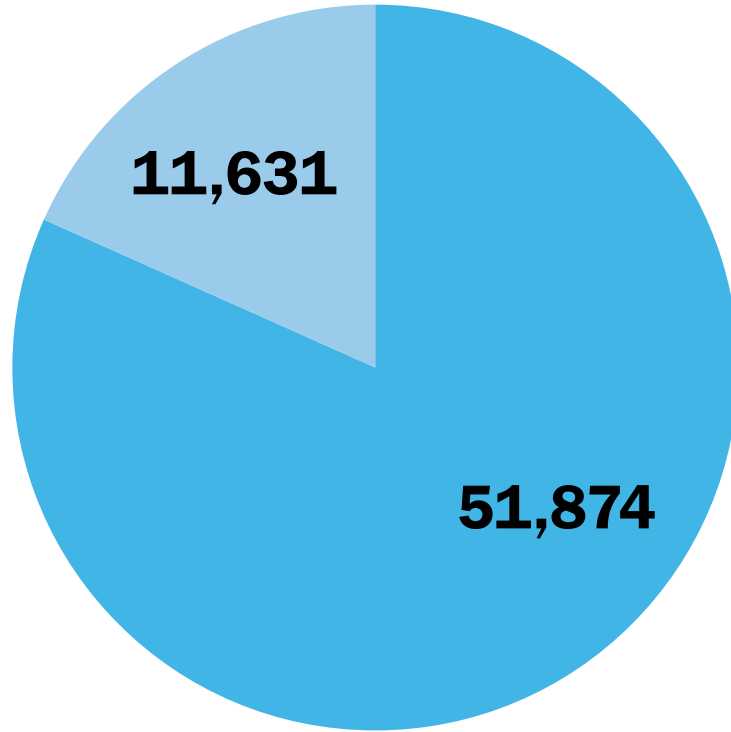
2024

■ Residents Under 65

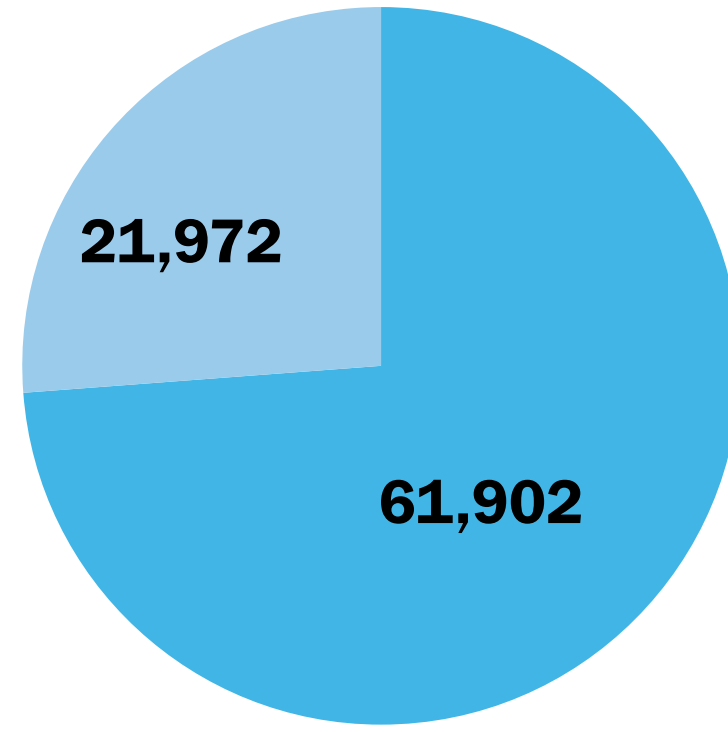
■ Residents 65+

# Population by Age Bands, 2010 vs. 2024

Chatham County has 10,341 more seniors in 2024 (July 1) than 2010 (April 1)



2010



2024

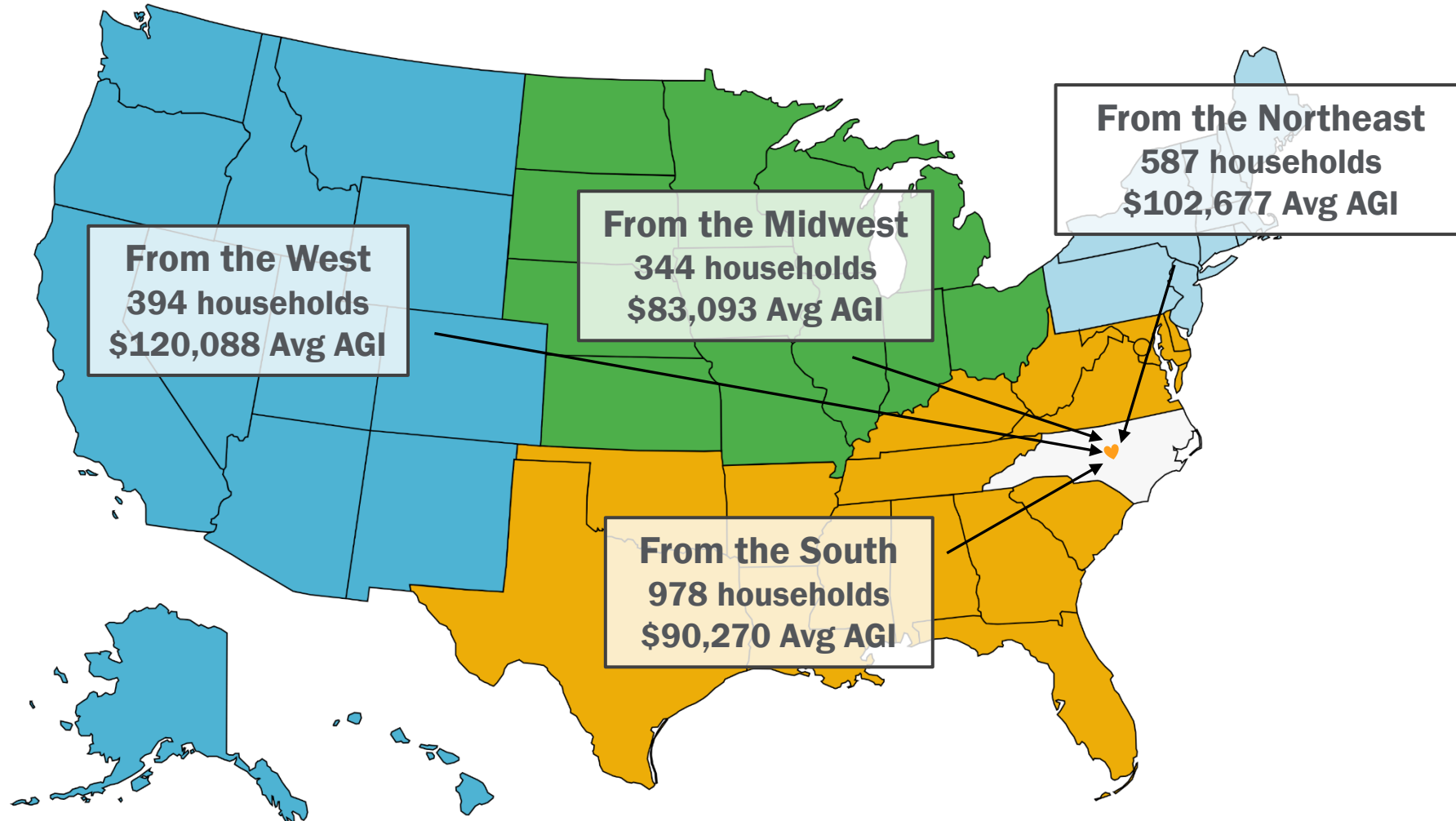
■ Residents Under 65

■ Residents 65+

# Population: Migration

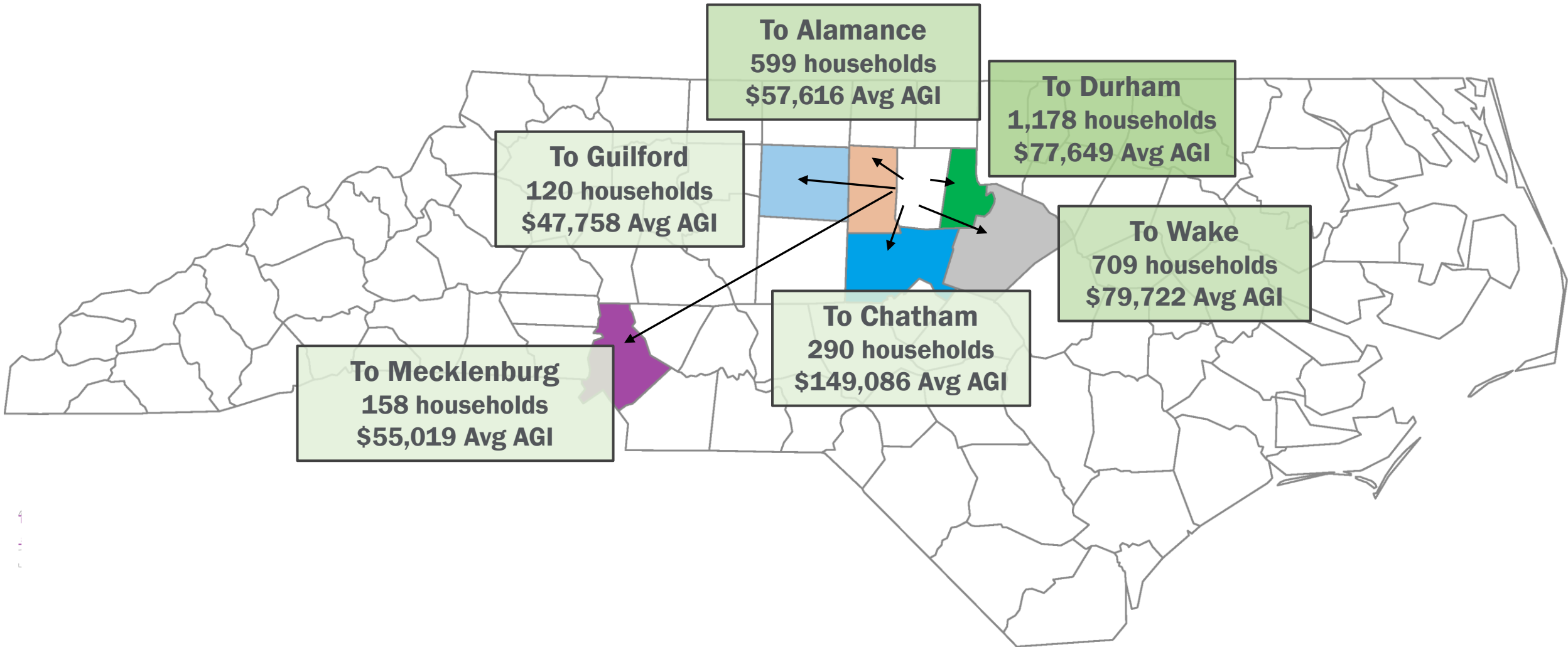
# Domestic Migration into Orange County

Household migration by region and average adjusted gross income (AGI), 2021 to 2022



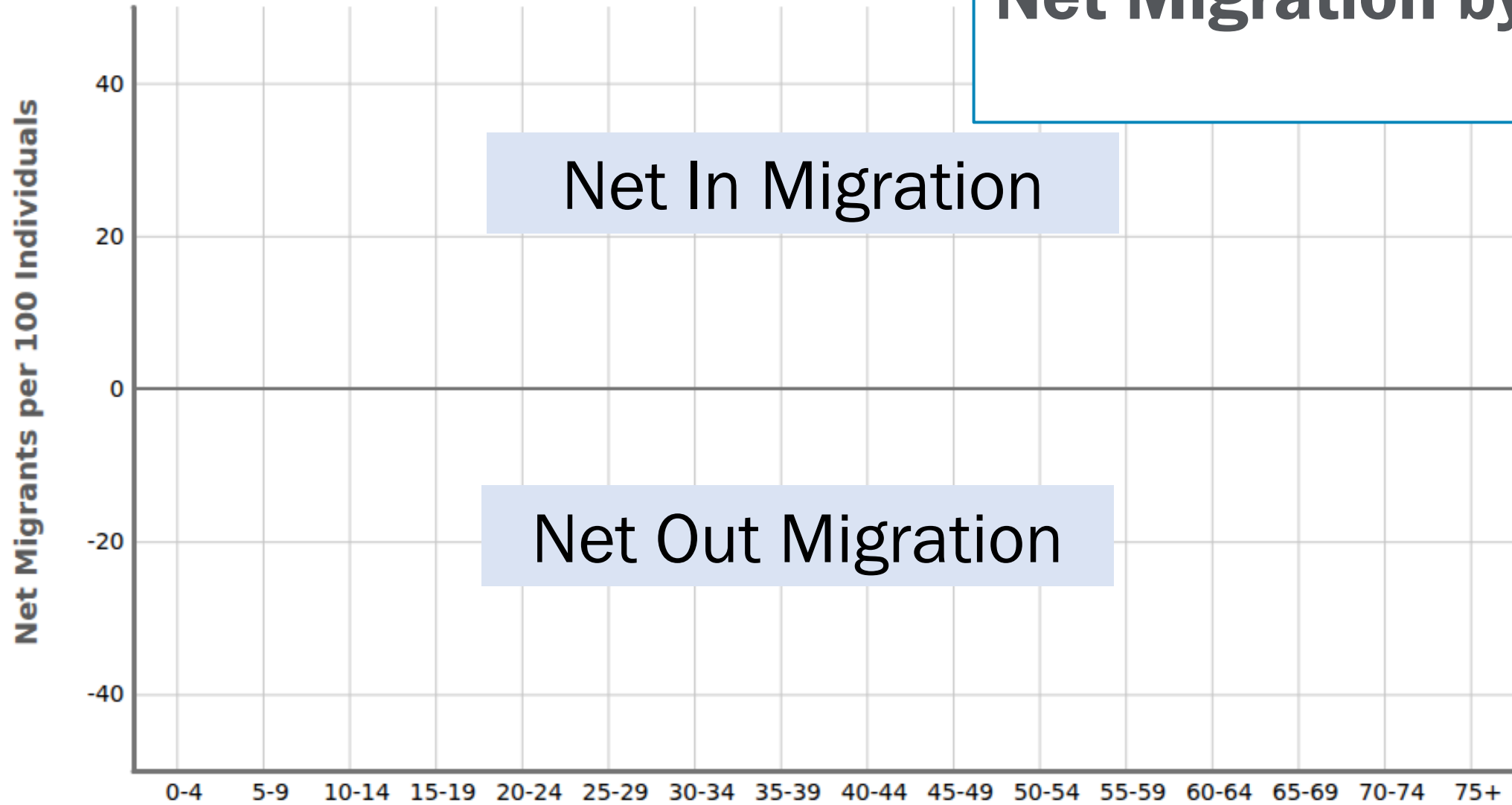
# Migration out of Orange County

Household migration by county and average adjusted gross income (AGI), 2021 to 2022



# Net Migration by Age

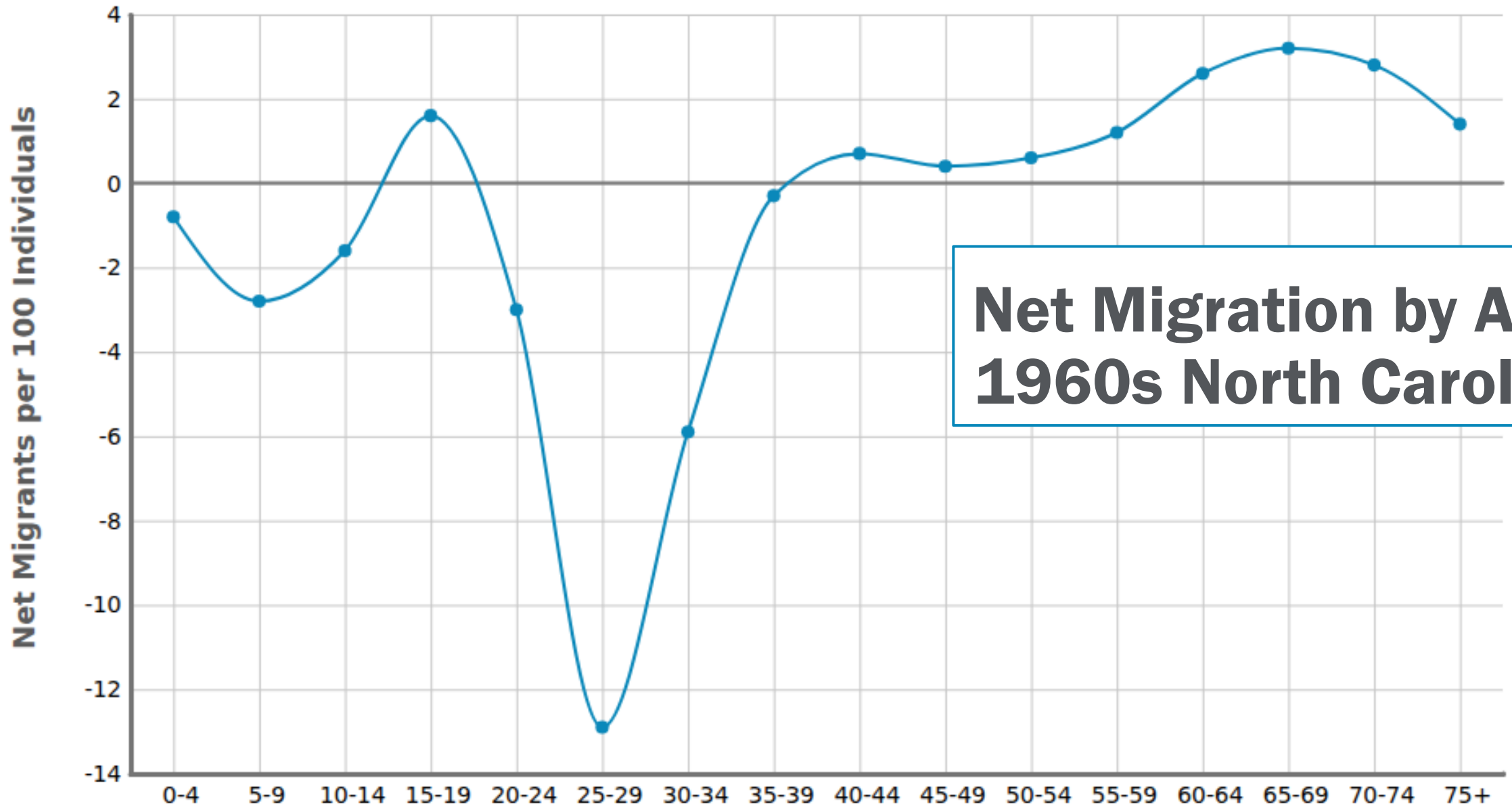
**Net Migration by Age:**



*Egan-Robertson, David, Katherine J. Curtis, Richelle L. Winkler, Kenneth M. Johnson, and Caitlin Bourbeau, Age-Specific Net Migration Estimates for US Counties, 1950-2020. Applied Population Laboratory, University of Wisconsin - Madison, 2024. Web.*

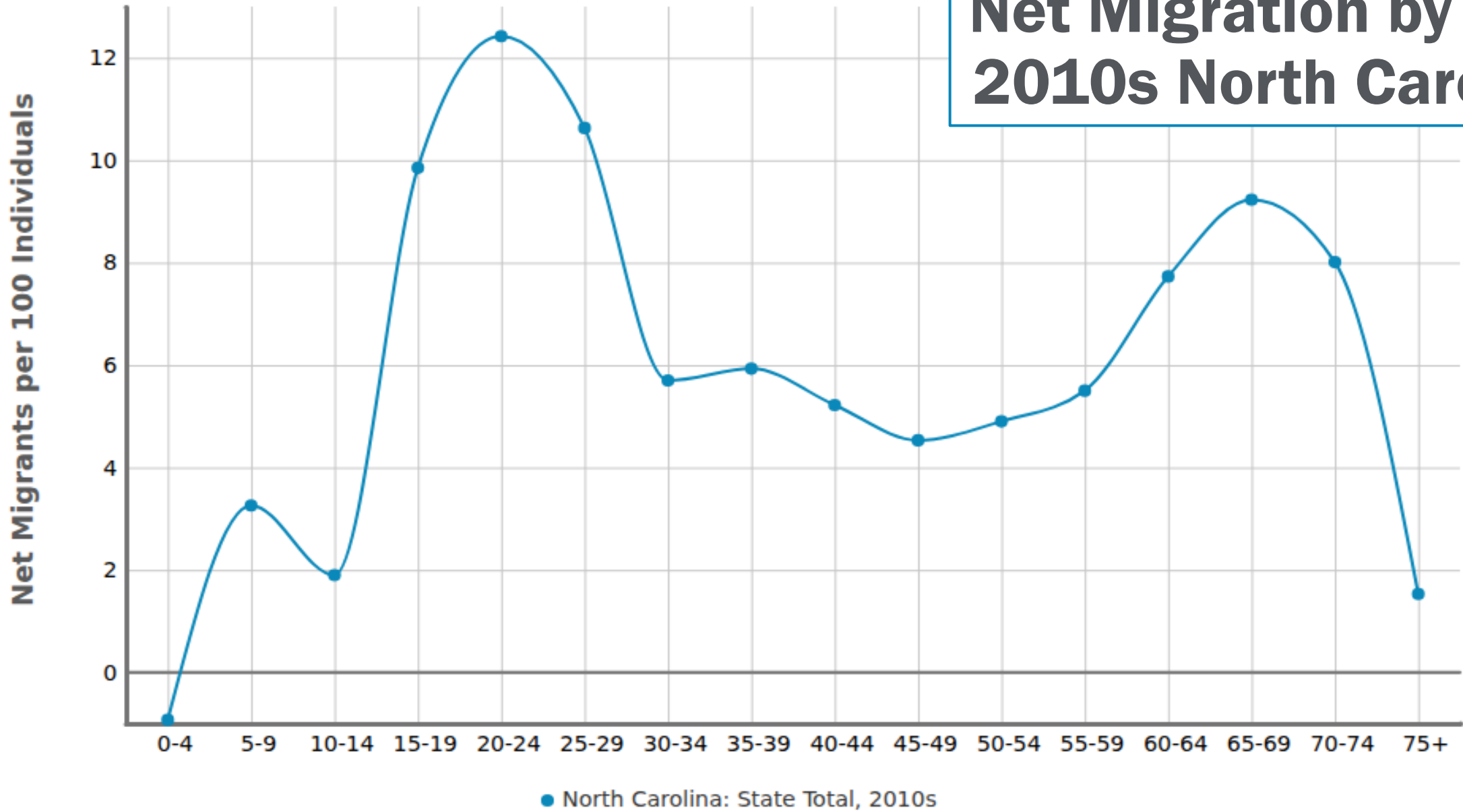
Source: Applied Population Laboratory, University of Wisconsin

# Net Migration by Age

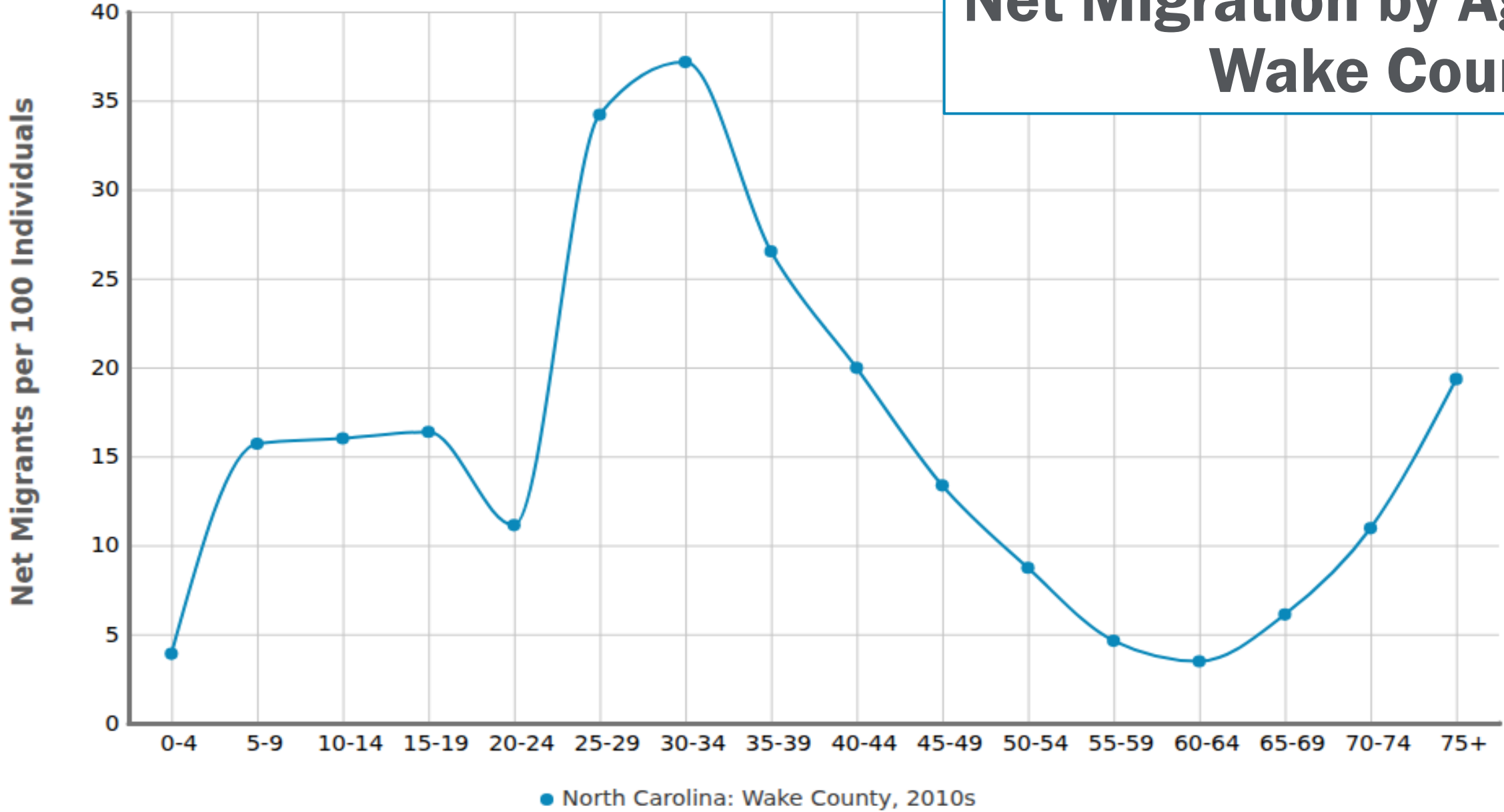


**Net Migration by Age:  
1960s North Carolina**

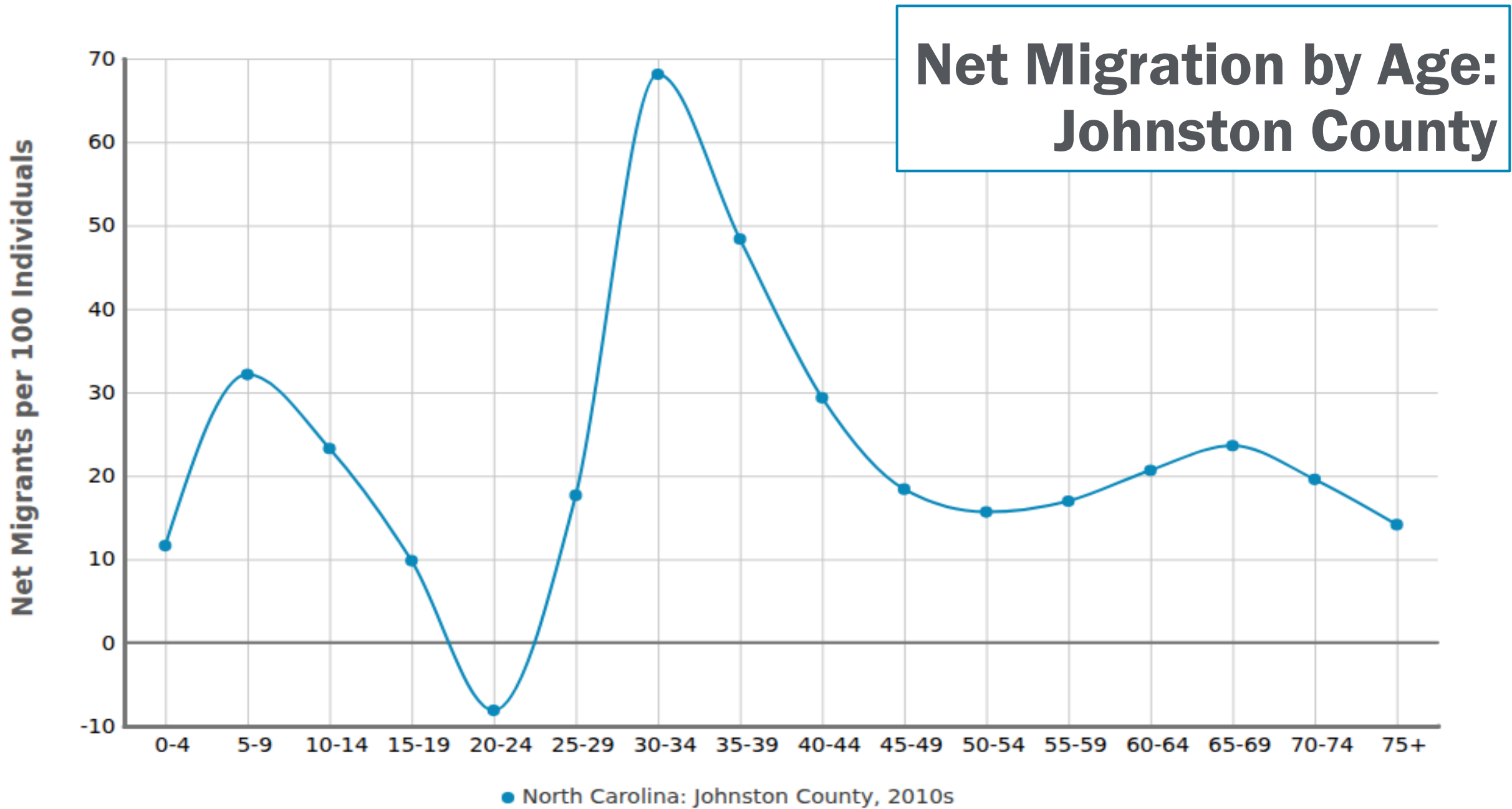
# Net Migration by Age: 2010s North Carolina



# Net Migration by Age: Wake County

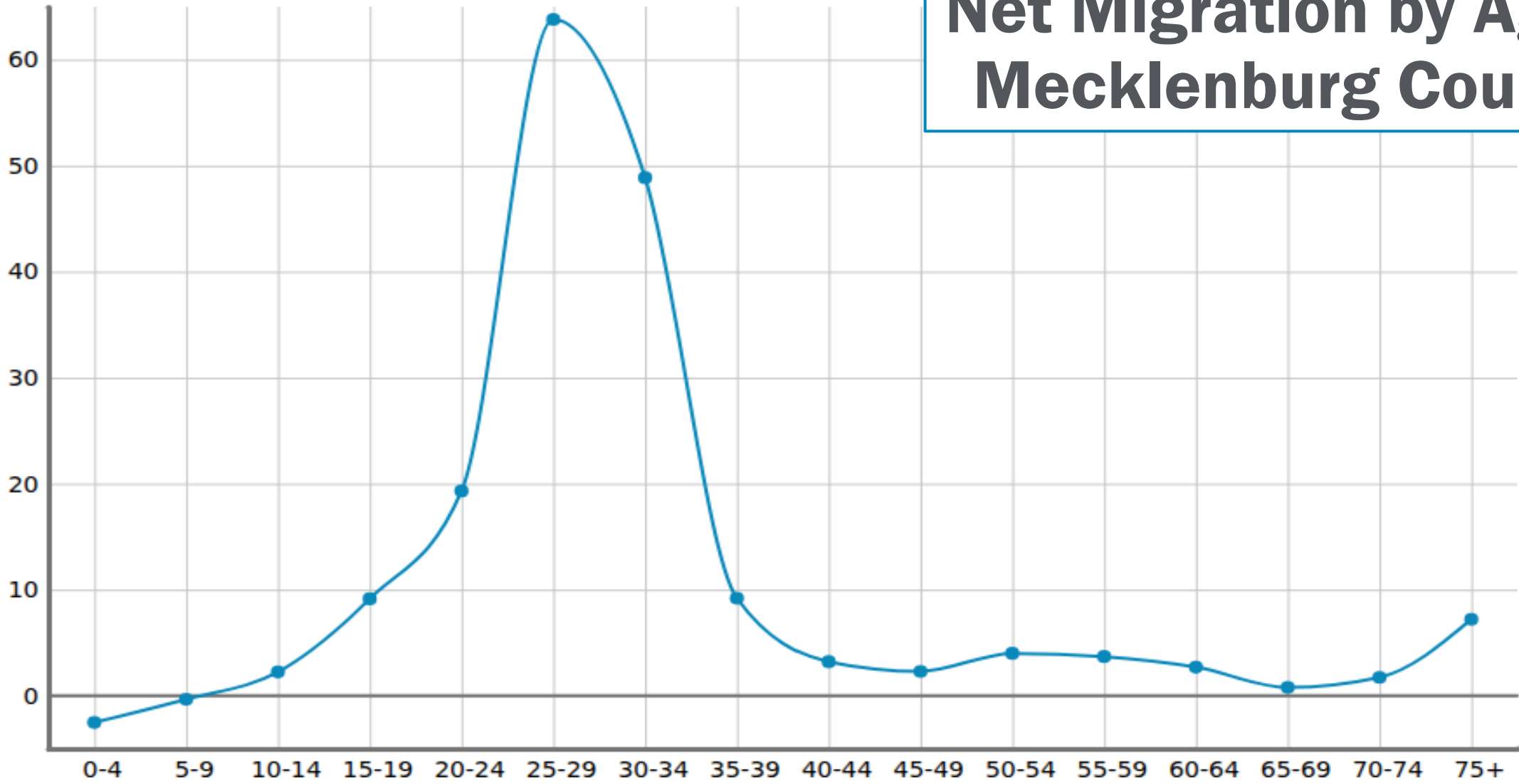


Source: Applied Population Laboratory, University of Wisconsin



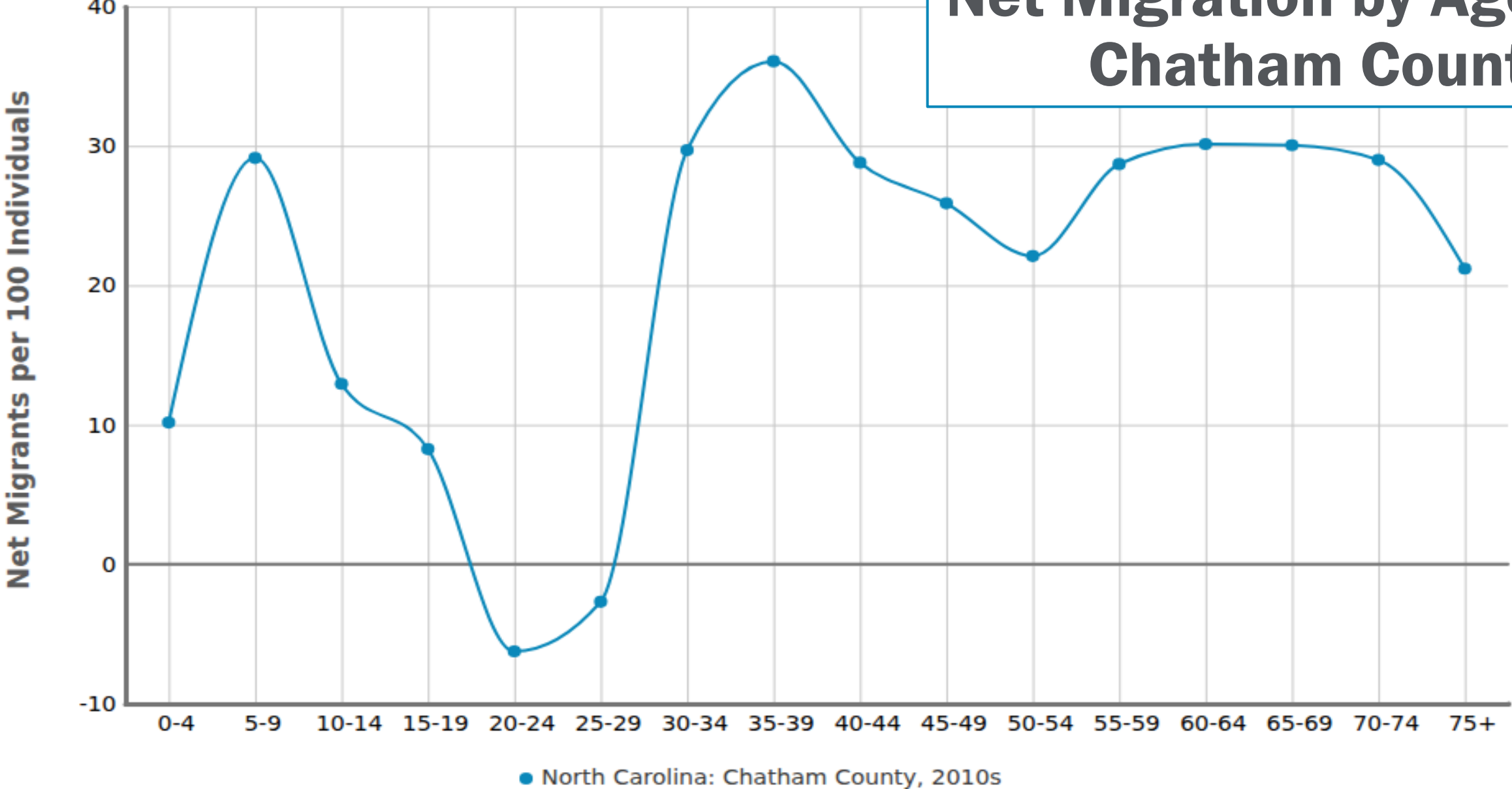
Net Migrants per 100 Individuals

# Net Migration by Age: Mecklenburg County



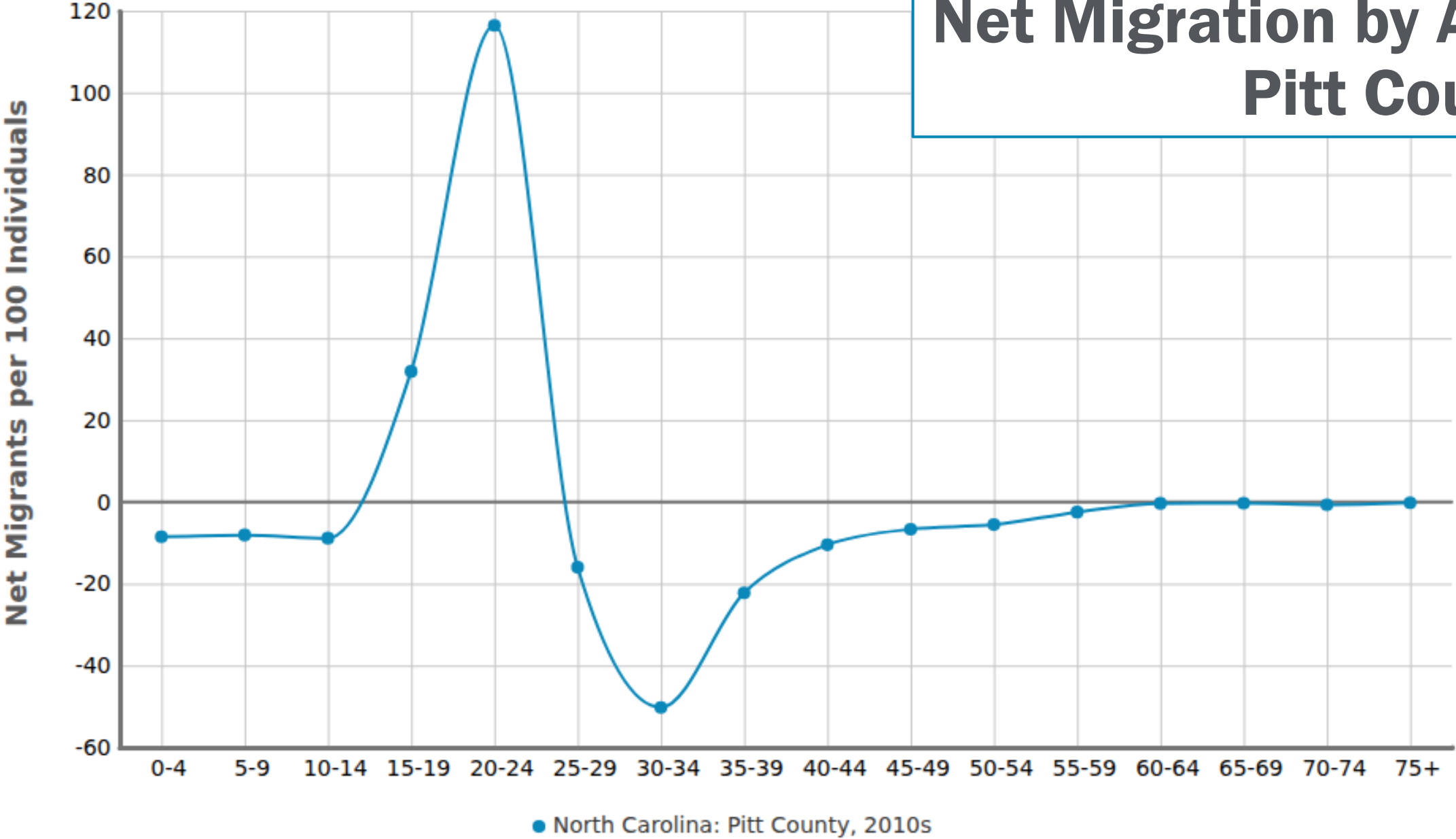
● North Carolina: Mecklenburg County, 2010s

# Net Migration by Age: Chatham County



Source: Applied Population Laboratory, University of Wisconsin

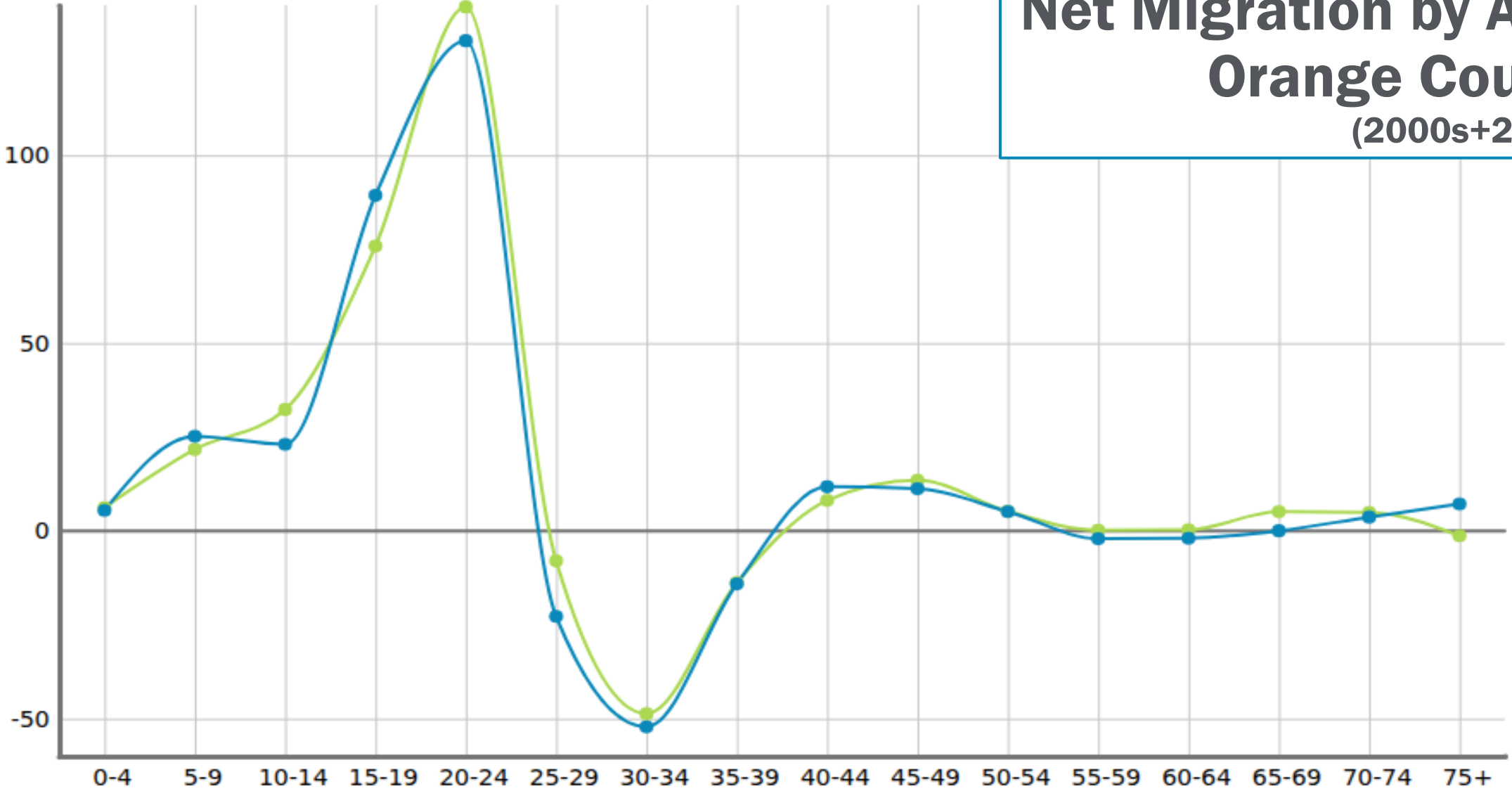
# Net Migration by Age: Pitt County



Source: Applied Population Laboratory, University of Wisconsin

# Net Migration by Age: Orange County (2000s+2010s)

Net Migrants per 100 Individuals



● North Carolina: Orange County, 2010s ● North Carolina: Orange County, 2000s

# Housing

presented by



**Christy Chestnut**

**Regional Director of Active Adult**

**INSPIRE<sup>®</sup>**

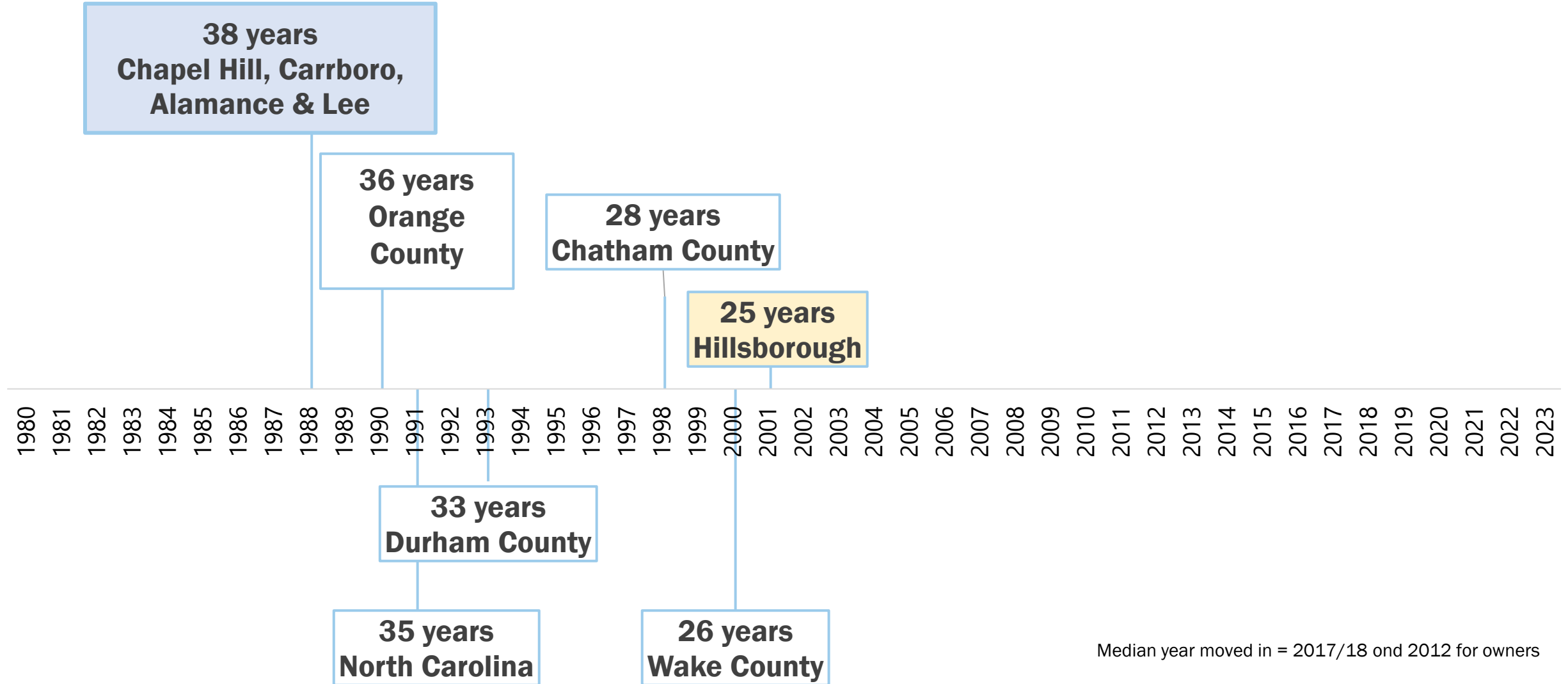
BY LIBERTY

BRIAR CHAPEL

**Housing: For Sale**

# Housing Structure Age

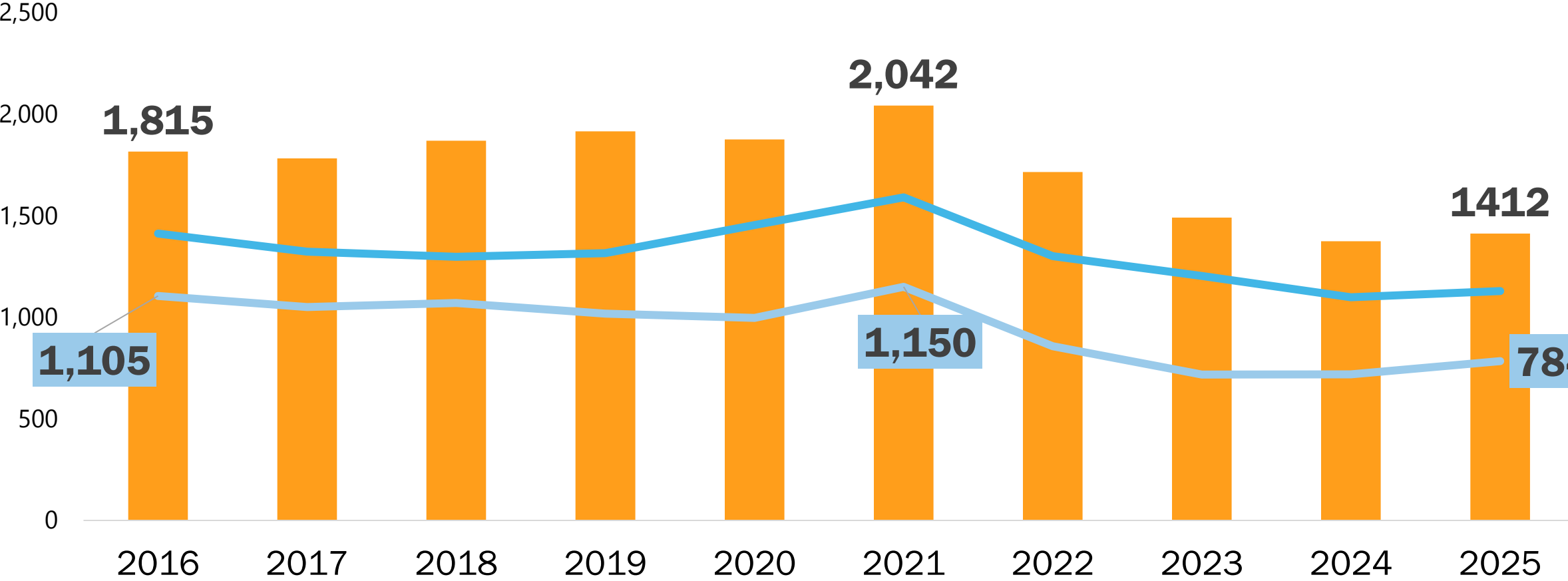
Median age of structures built



Median year moved in = 2017/18 and 2012 for owners

Source: American Community Survey (2020-2024 5-Year Estimates)

# Total Home Sales by County & School District

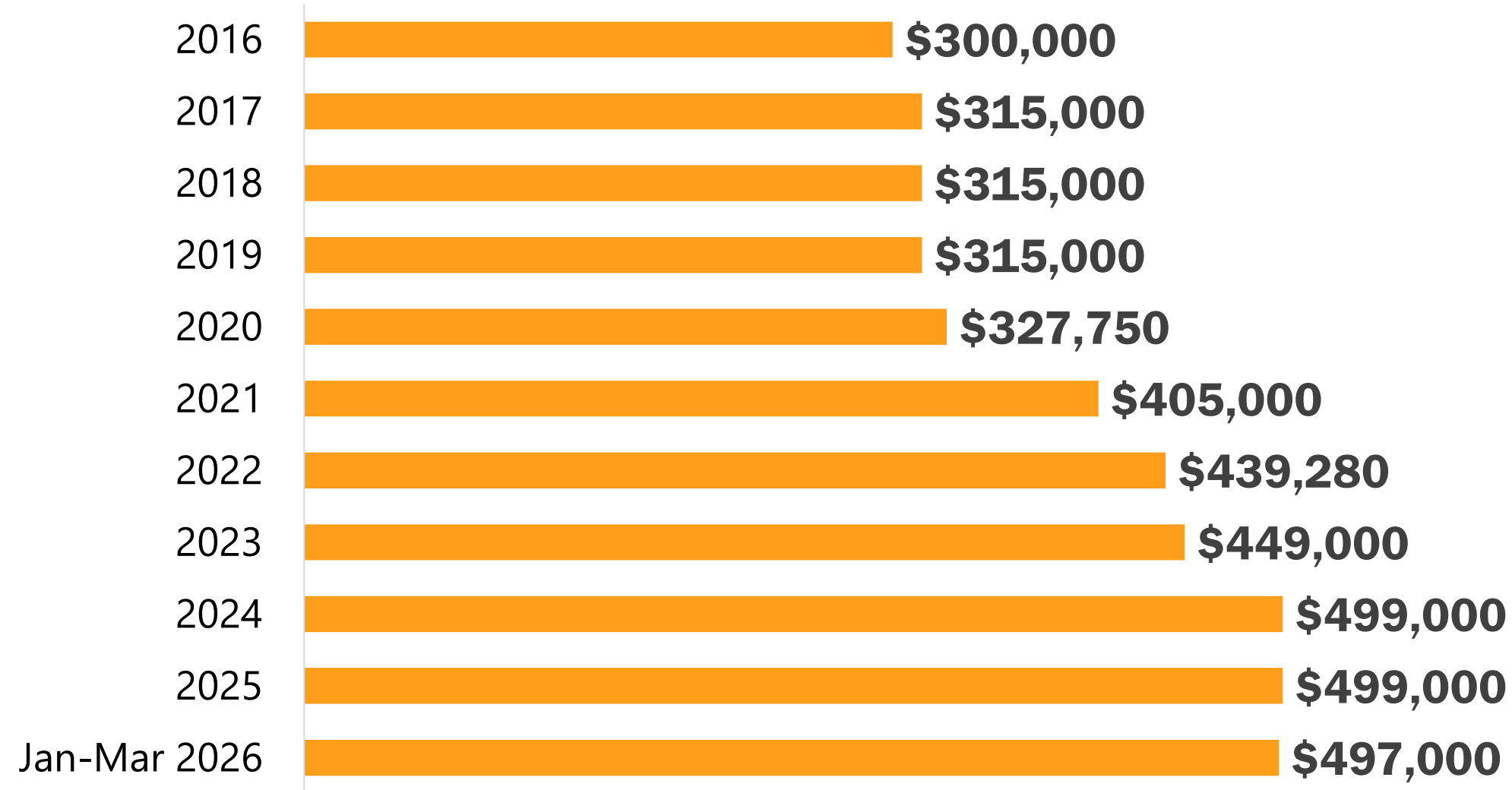


Orange County Chatham County CHCCS District

Source: Triangle MLS/Allen Tate Realtors

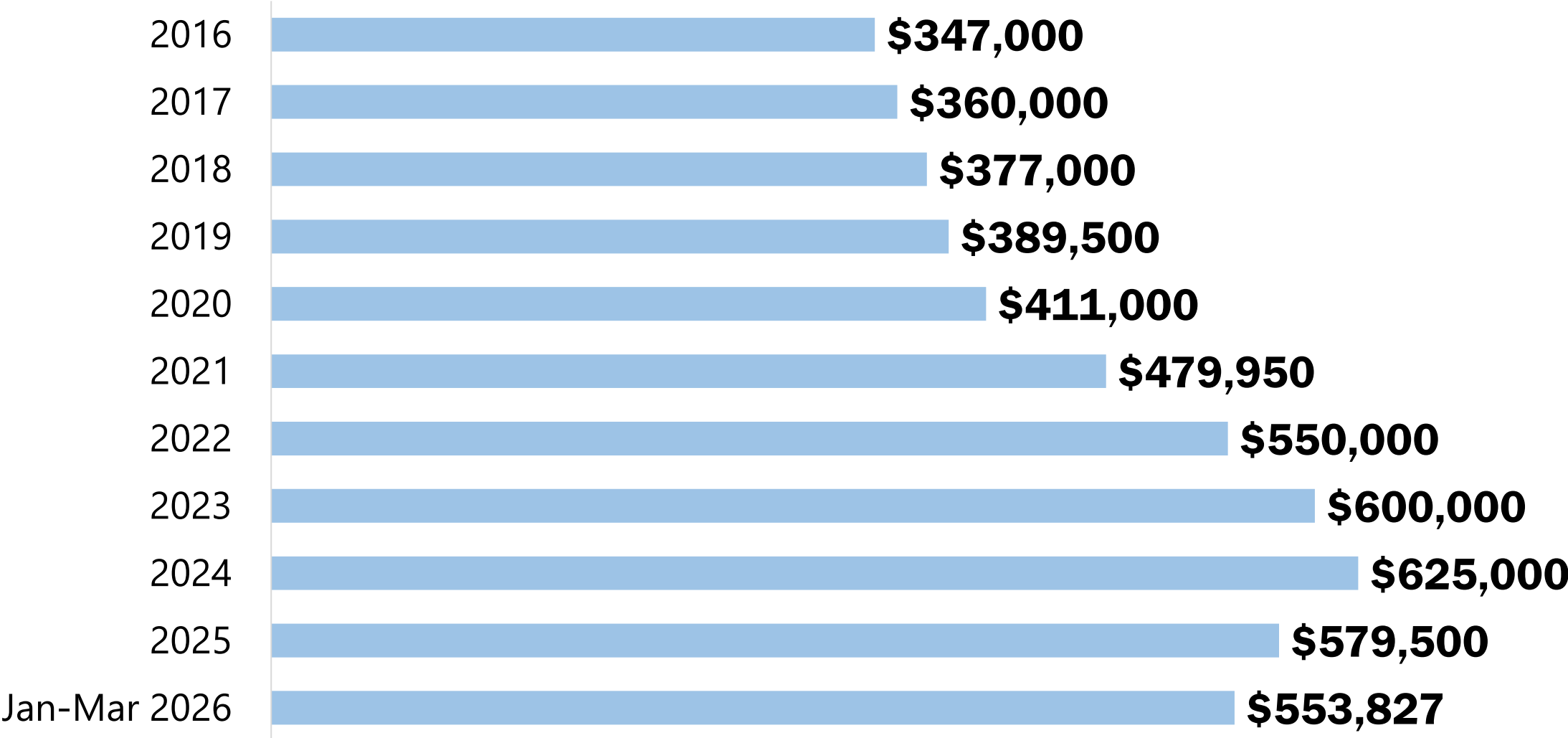
# Home Sale Prices – Orange County

Orange County median home sales price, 2015 to March 2026



# Home Sale Prices – Chapel Hill-Carrboro School District

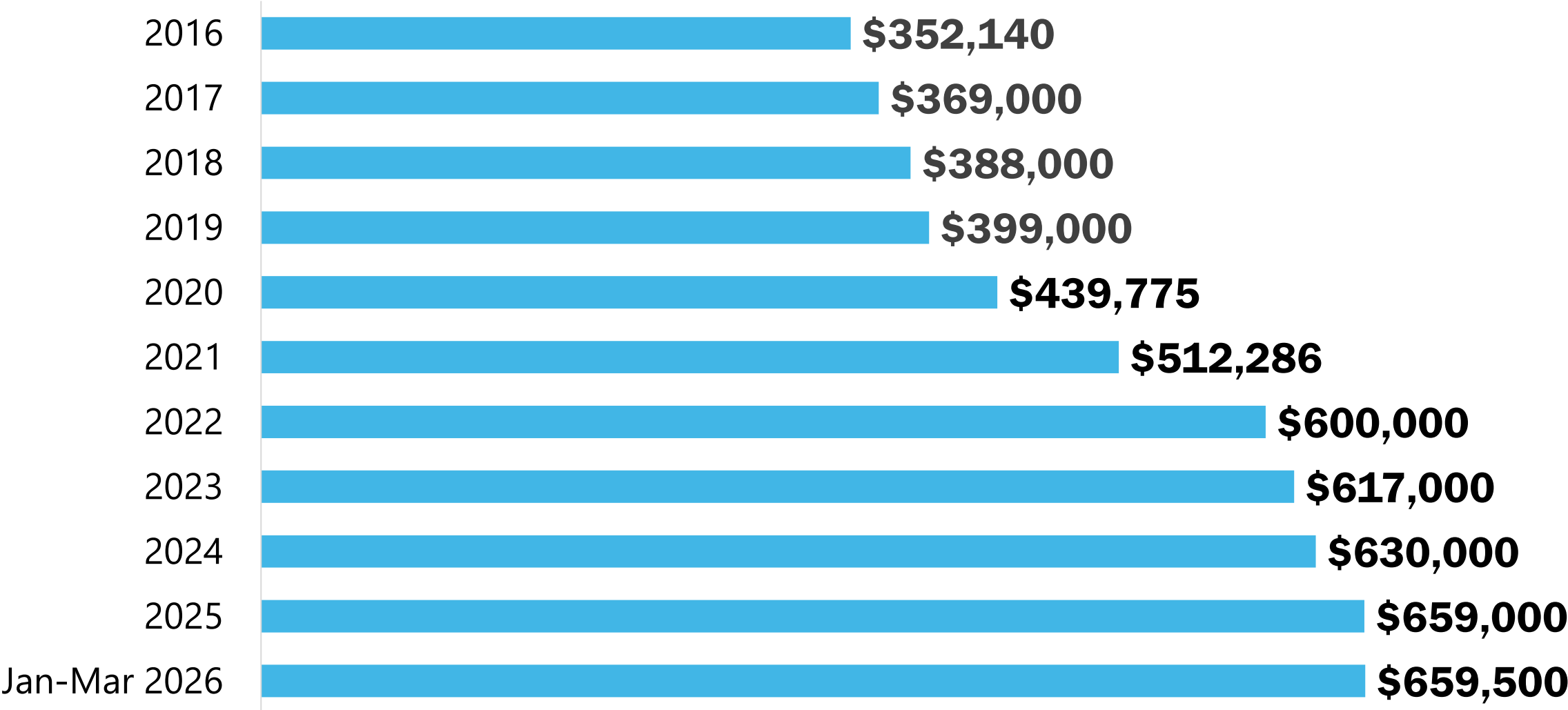
Median home sales price inside the Chapel Hill-Carrboro City School District, 2015 to March 2026



Source: Triangle MLS/Allen Tate Realtors

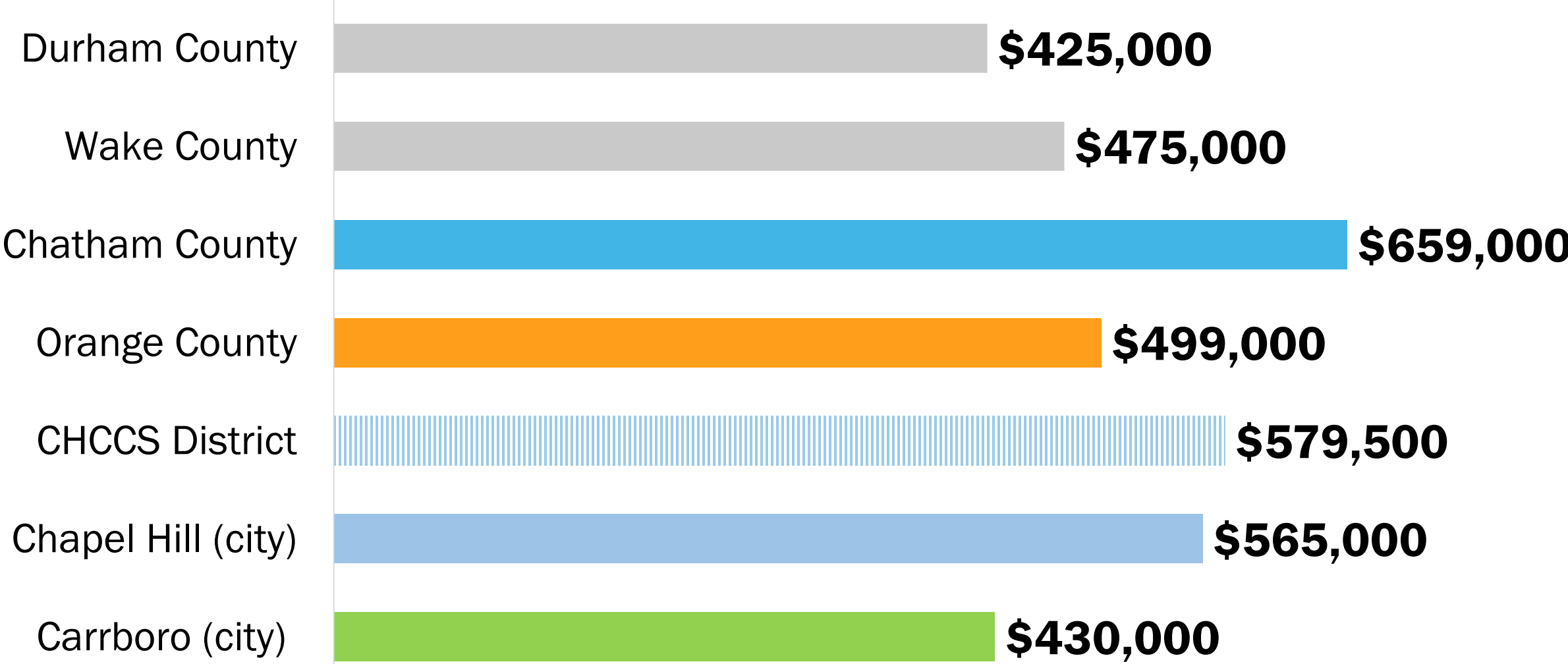
# Home Sale Prices – Chatham County

Chatham County median home sales price, 2015 to March 2026



Source: Triangle MLS/Allen Tate Realtors

# 2025 Median Residential Closing Price



Source: Triangle MLS/Allen Tate Realtors

# 2025 New Home Sales as a Share of Total Homes Sold

New housing units as percent of total sales, 2025



**Orange County**

**11%**



**Chatham County**

**23%**

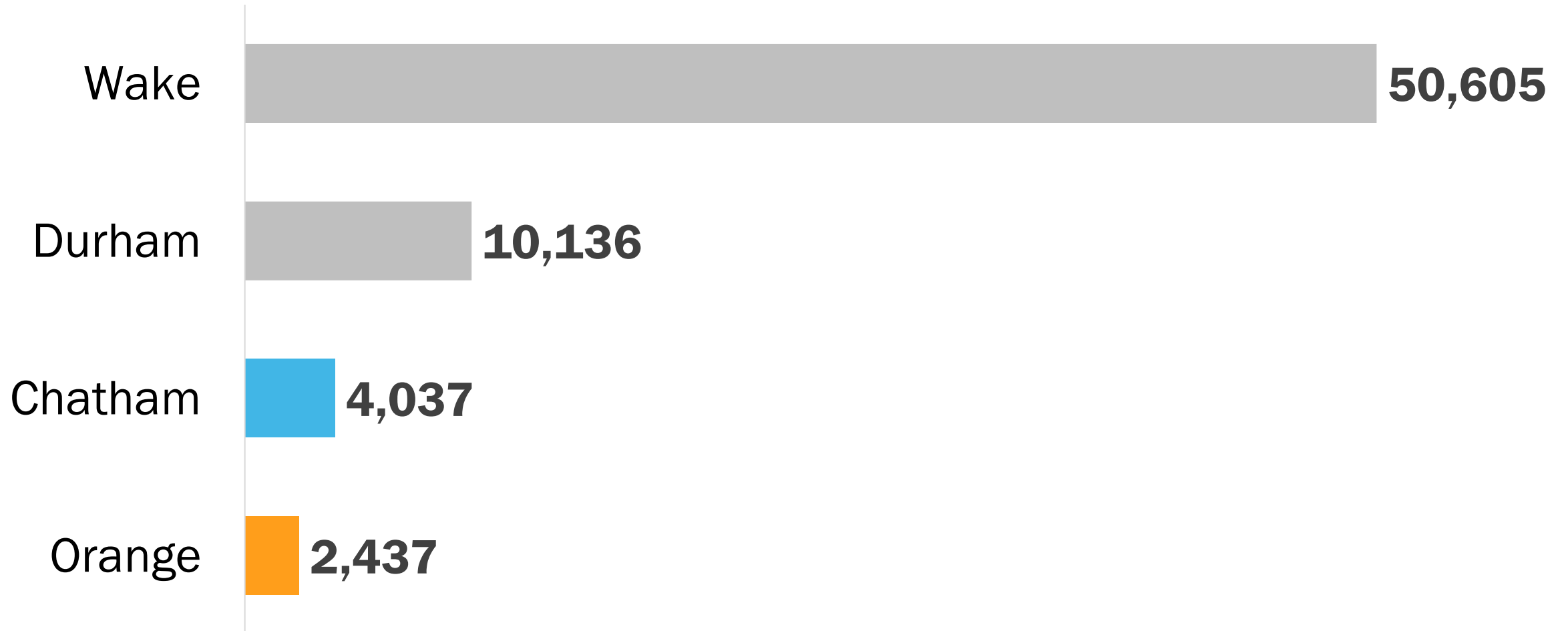


**CHCCS District**

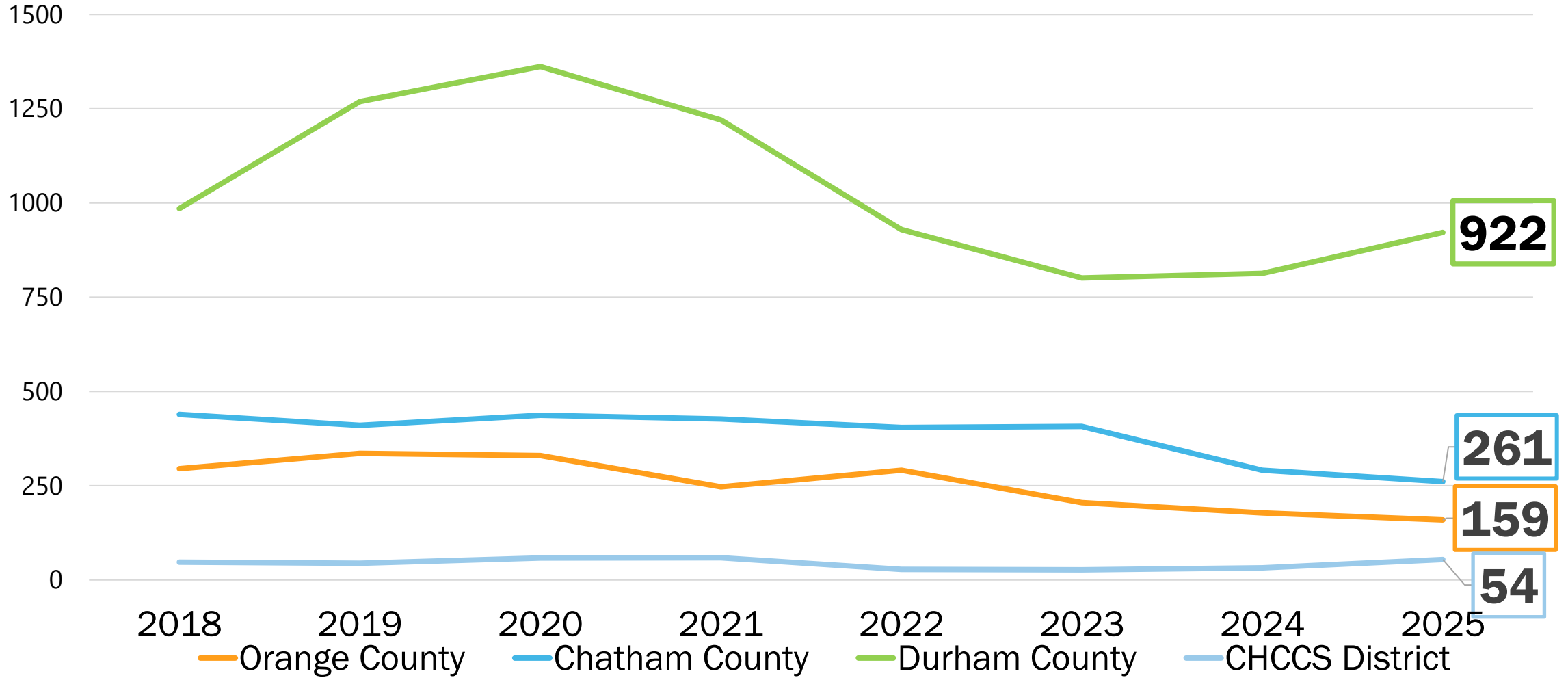
**7%**

# New Homes Sold in the Last Decade

Total new construction home sales by county, 2016-2025

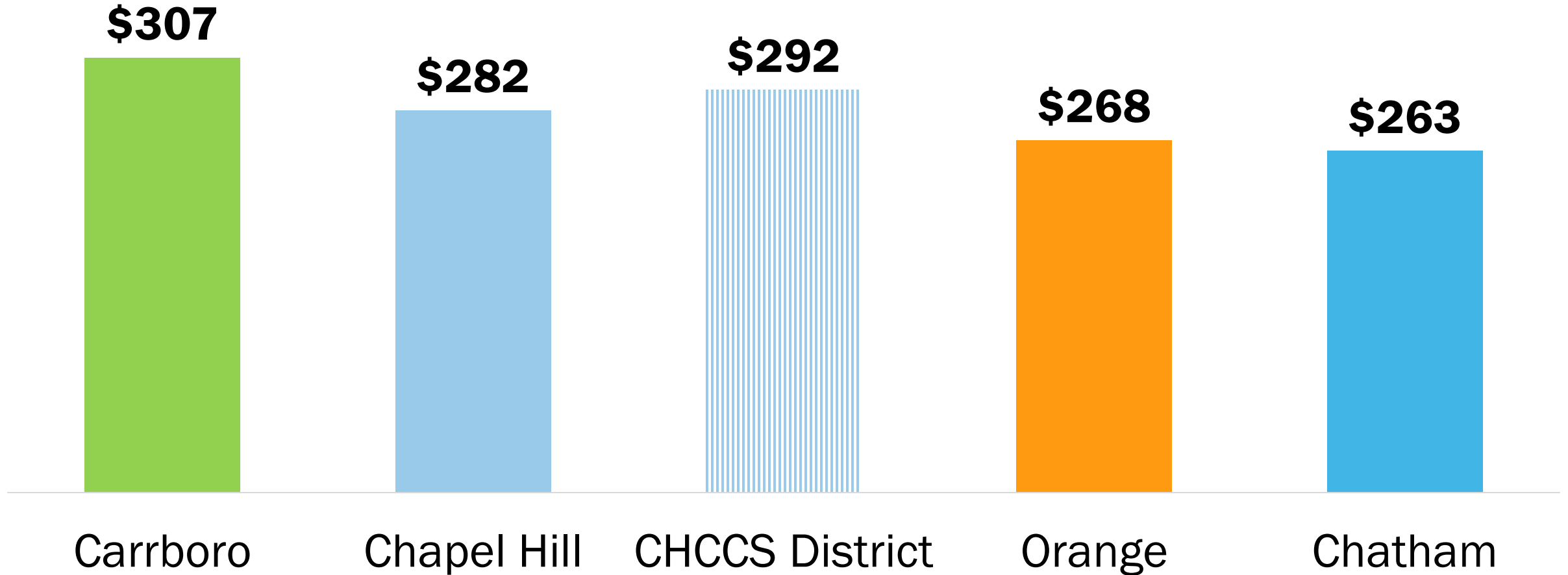


# New Construction Home Sales Per Year



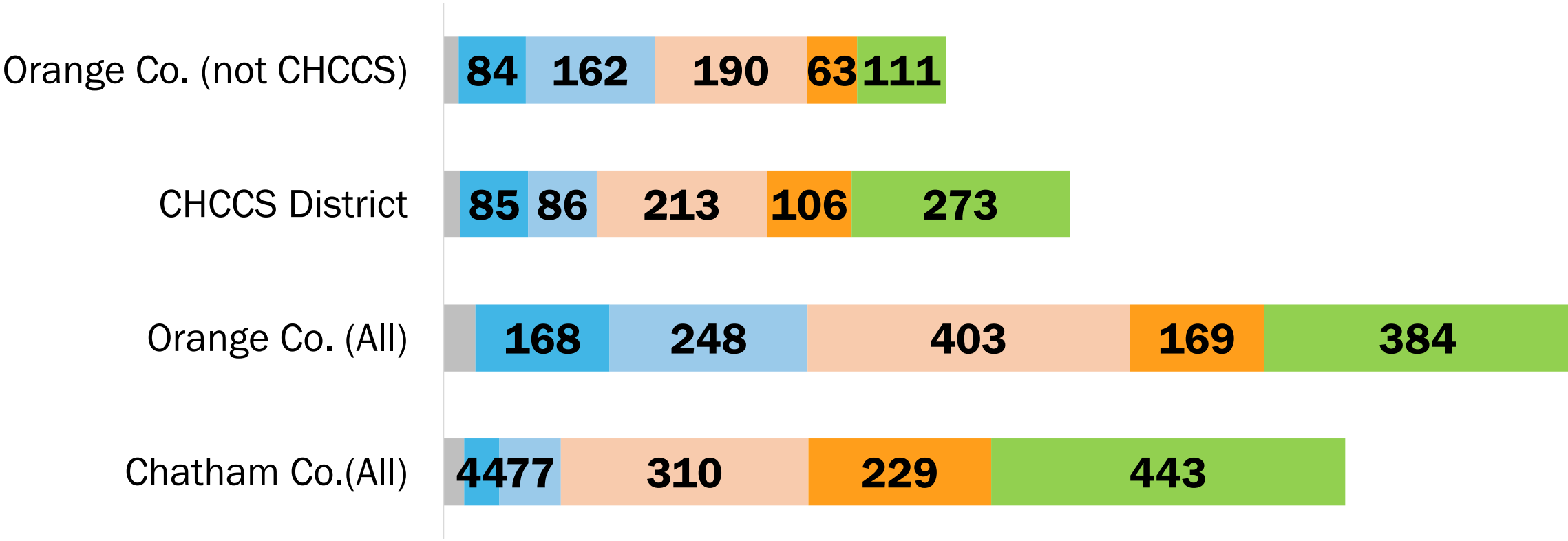
# Median Price Per Square Foot

2025



# 2025 Home Sales by Price Band

Share of 1,412 Orange and 1,129 Chatham home transactions by closing price

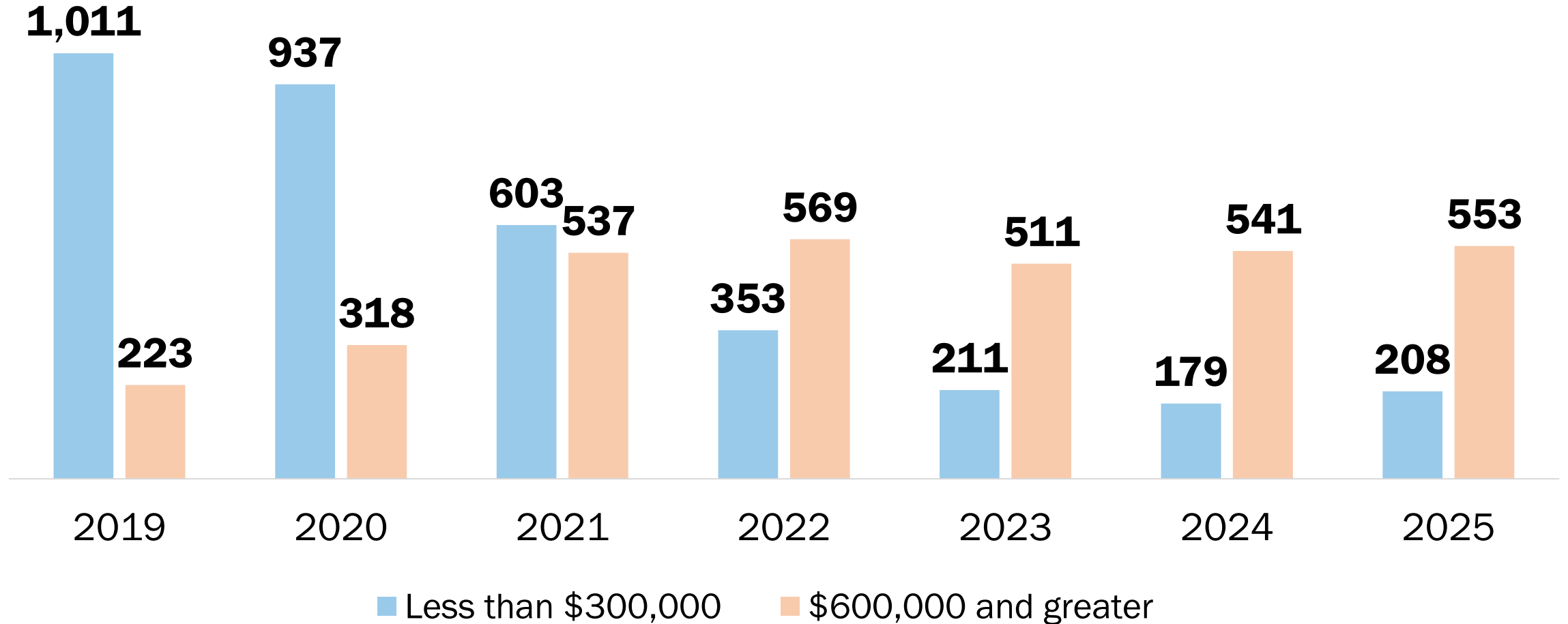


- <\$199,999
- \$200,000-\$299,999
- \$300,000-\$399,999
- \$400,000-\$599,999
- \$600,000-\$749,999
- \$750,000 or more

Source: Triangle MLS/Allen Tate Realtors

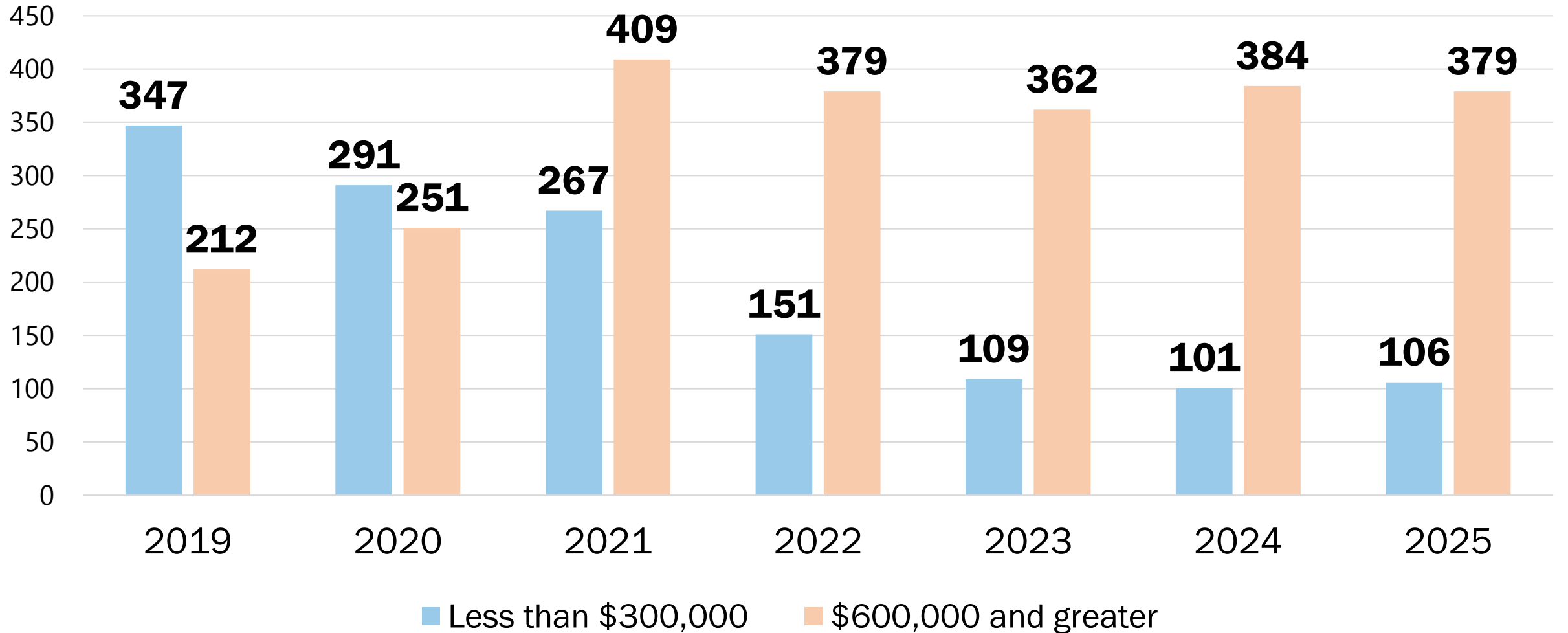
# Orange County Median Home Price Shift

Number of home transactions by closing price range 2019 to 2025



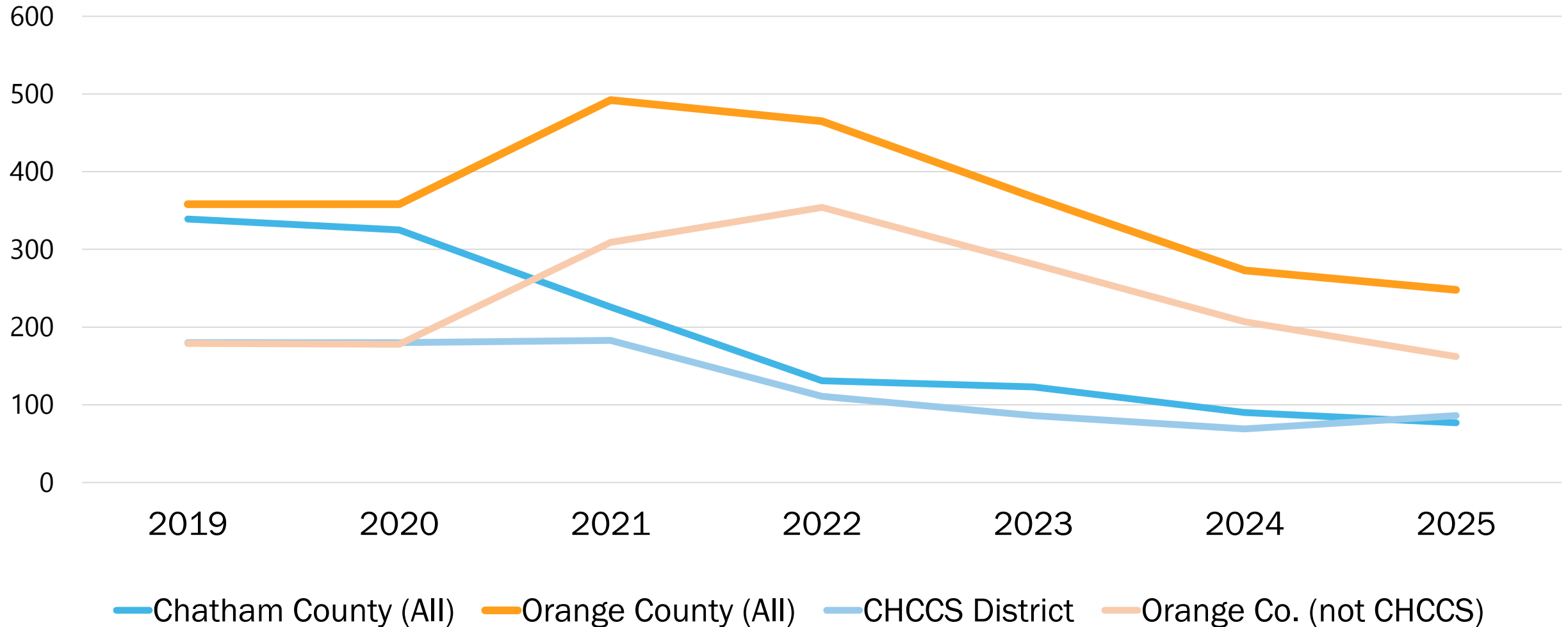
# CHCCS District Median Home Price Shift

Number of home transactions by closing price range 2019 to 2025



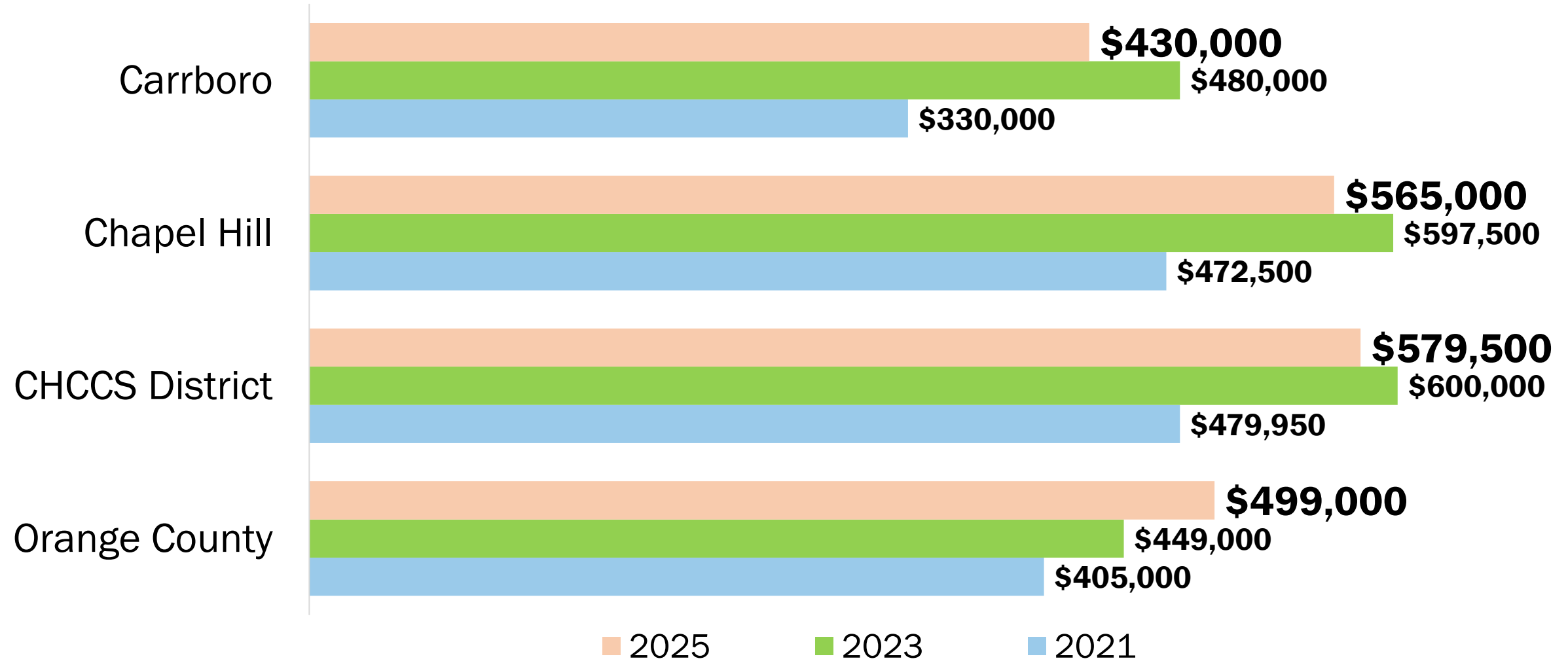
# Home Transactions in the \$300,000s

Number of home sales between \$300,000-\$399,999



# Change in Median Home Sale Price

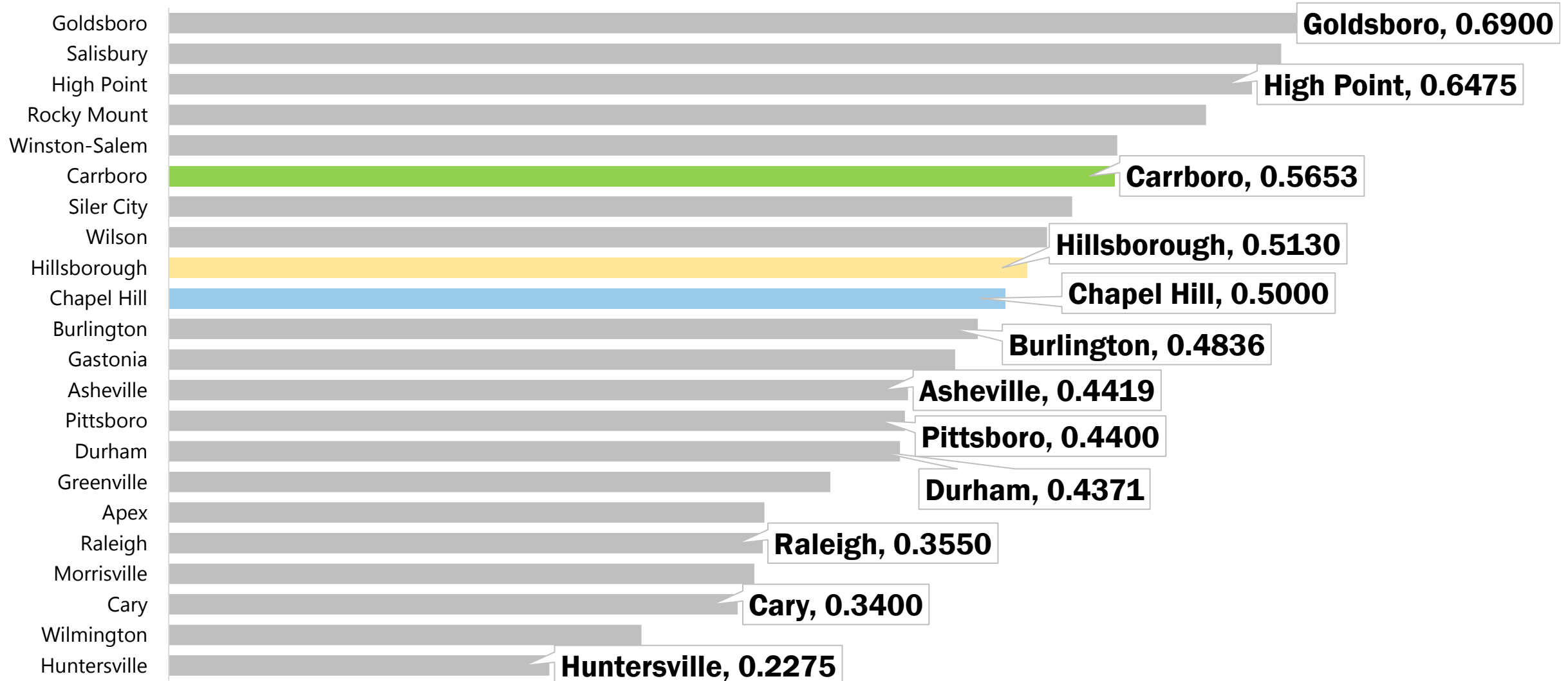
Median home sale price in 2021, 2023, and 2025



# Housing: Taxes

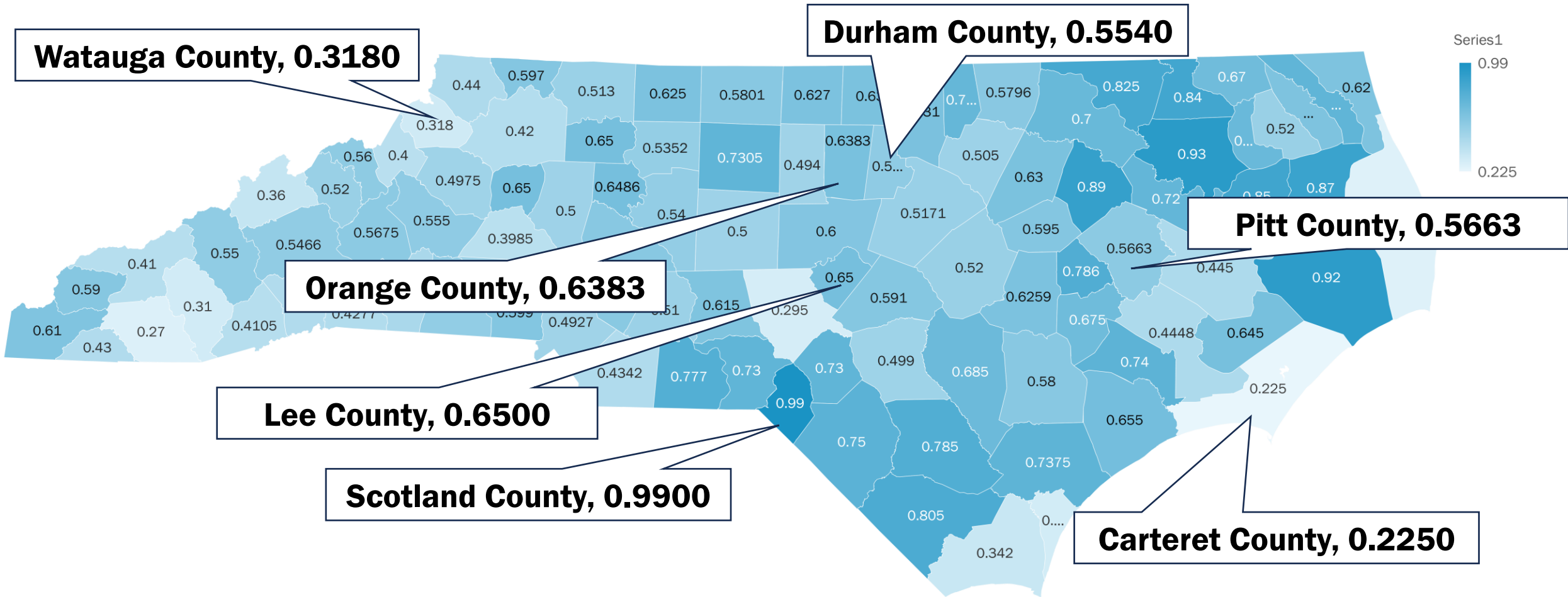
# NC Municipal Property Tax Rates

Municipal property tax rates per \$100 value, FY2026



# NC County Property Tax Rates

Combined jurisdiction property tax rates per \$100 value FY2026

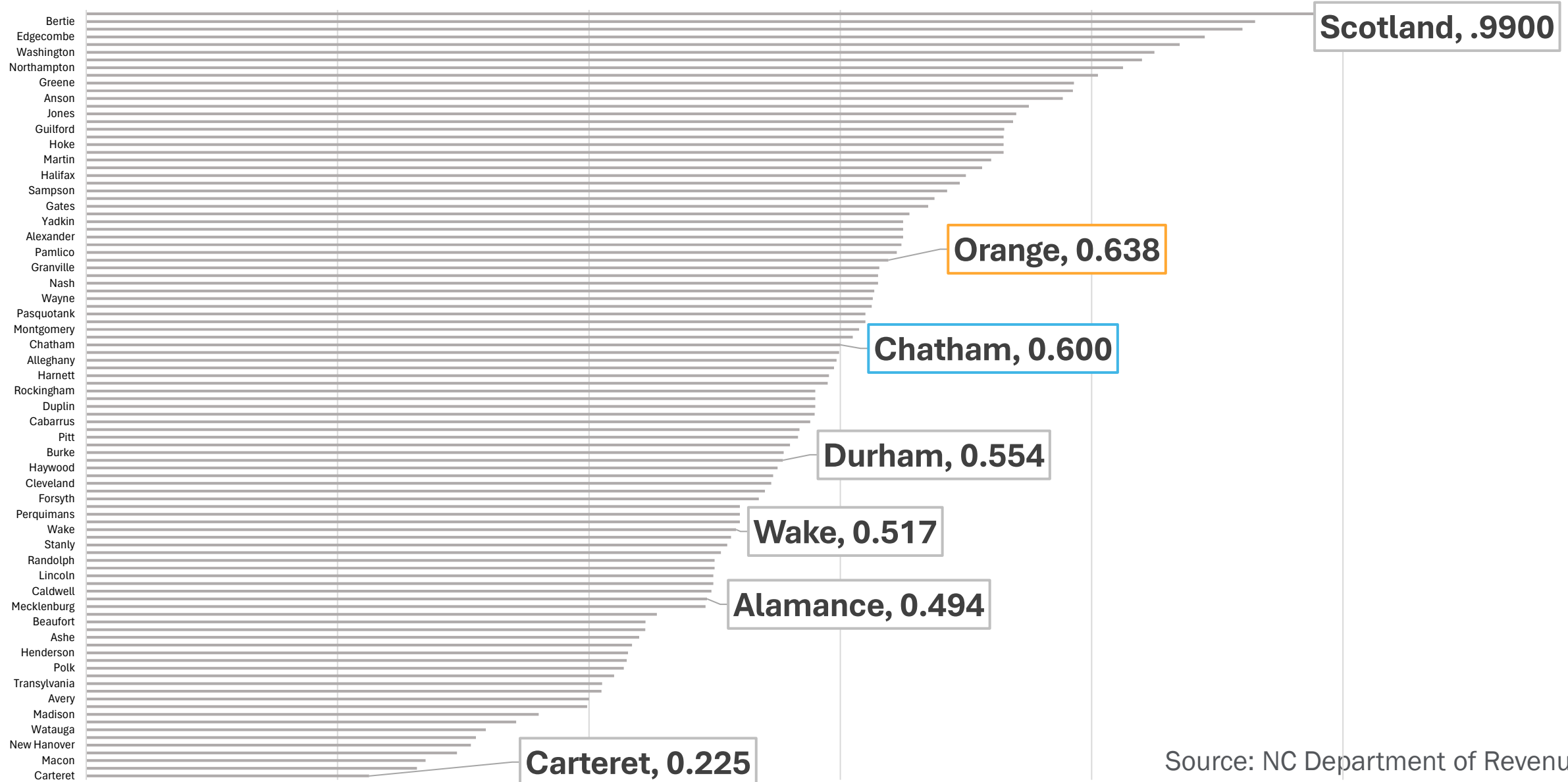


Powered by Bing  
© GeoNames, TomTom

Source: NC Department of Revenue

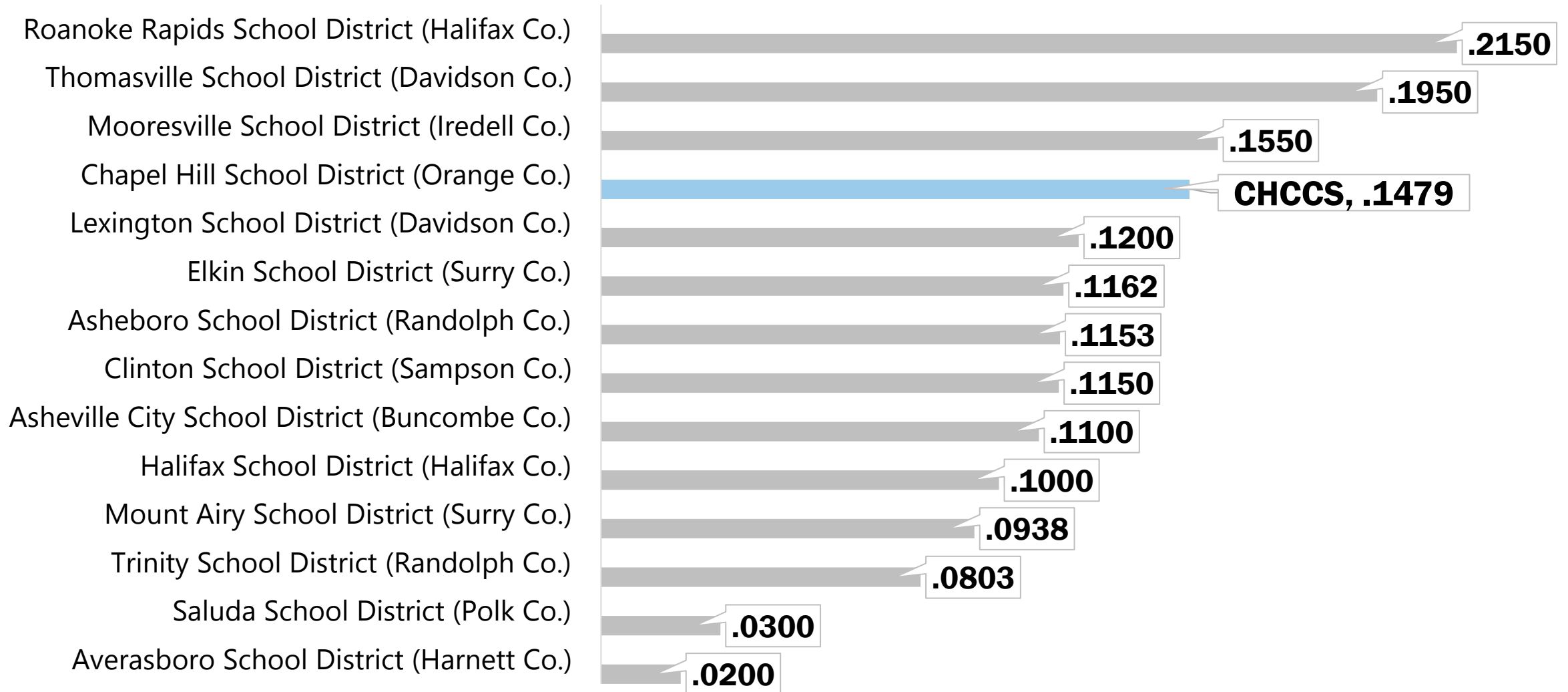
# NC County Property Tax Rates

Combined jurisdiction property tax rates per \$100 value FY2026



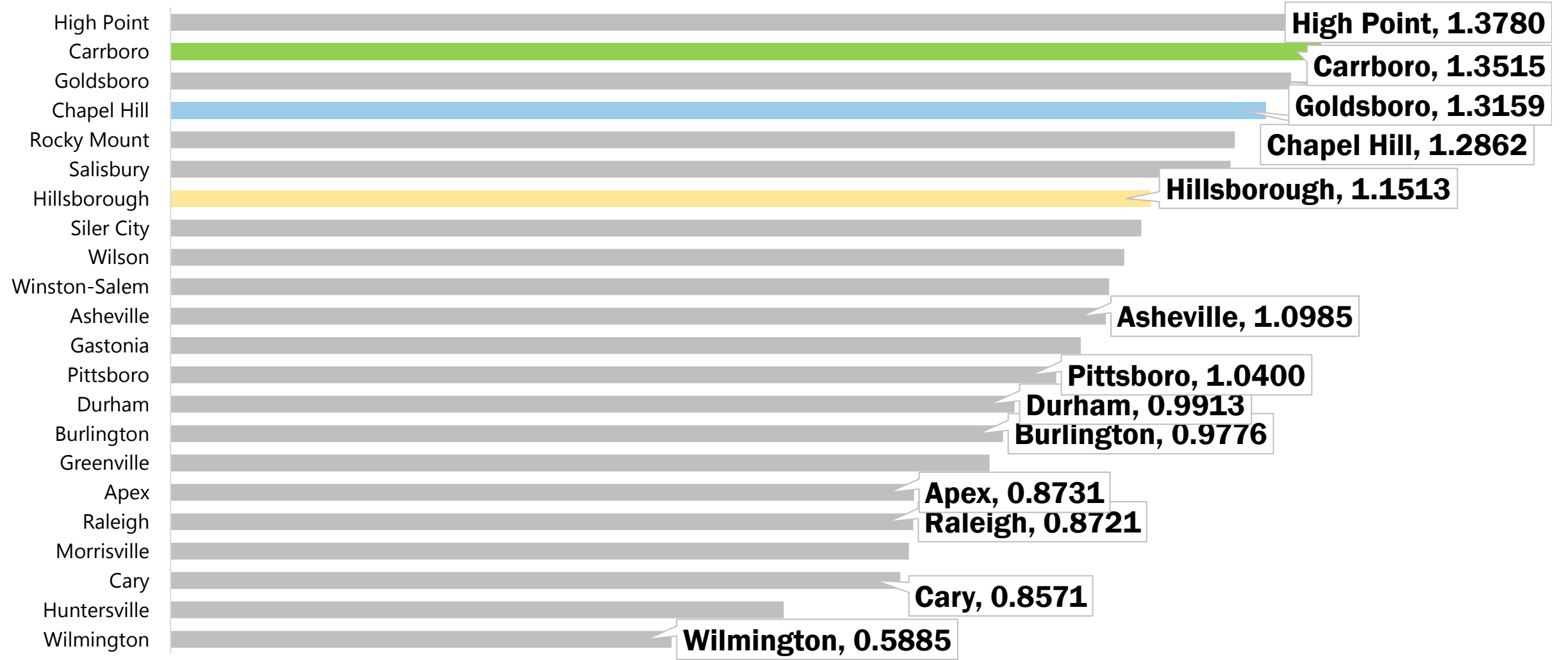
# North Carolina's School District Taxes

North Carolina's school district tax rates per \$100 value, FY2026



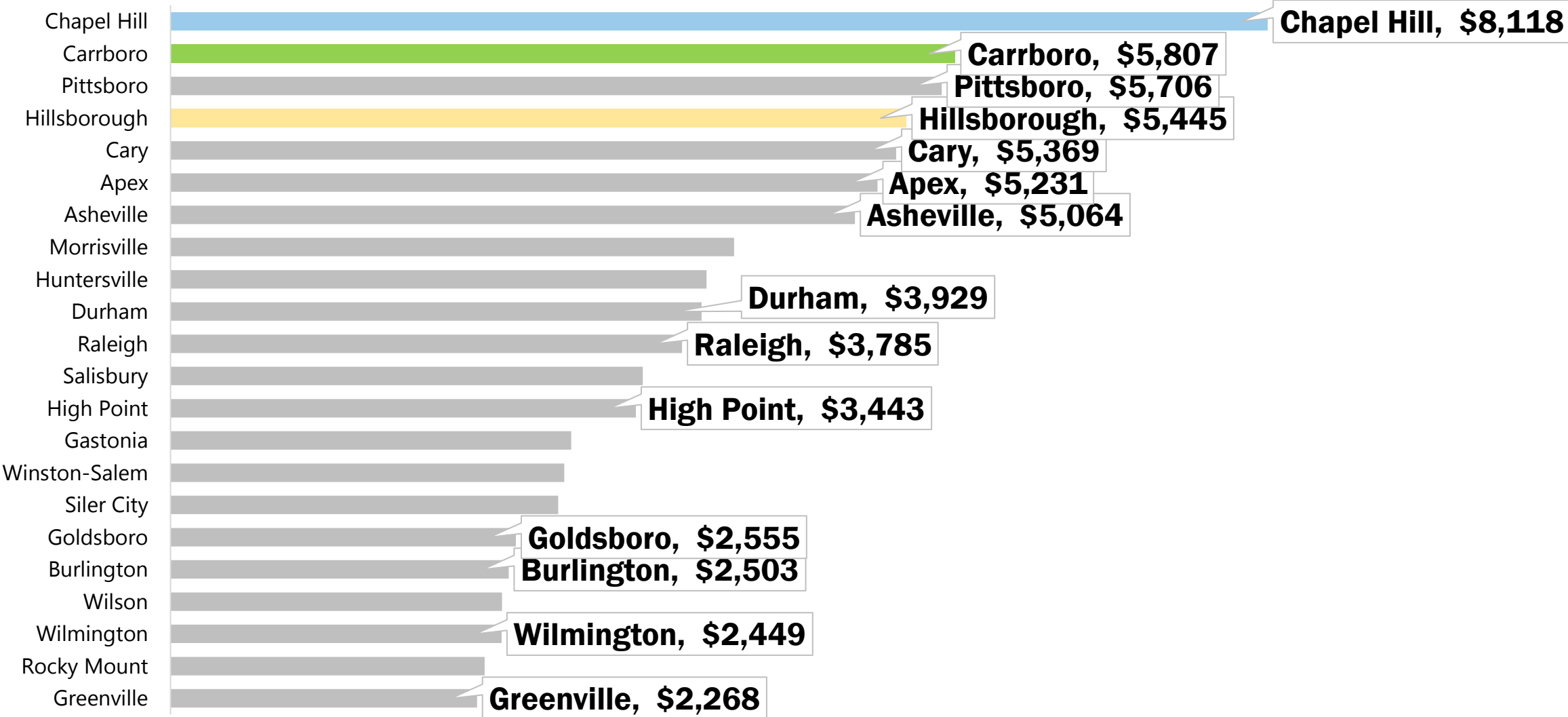
# NC Combined Property Tax Rates

Combined jurisdiction property tax rates per \$100 value (municipality + county + school district), FY2026



# 2026 Median Residential Property Tax

Combined local property tax rates (FY2026) applied to that city's median home value, March 2026

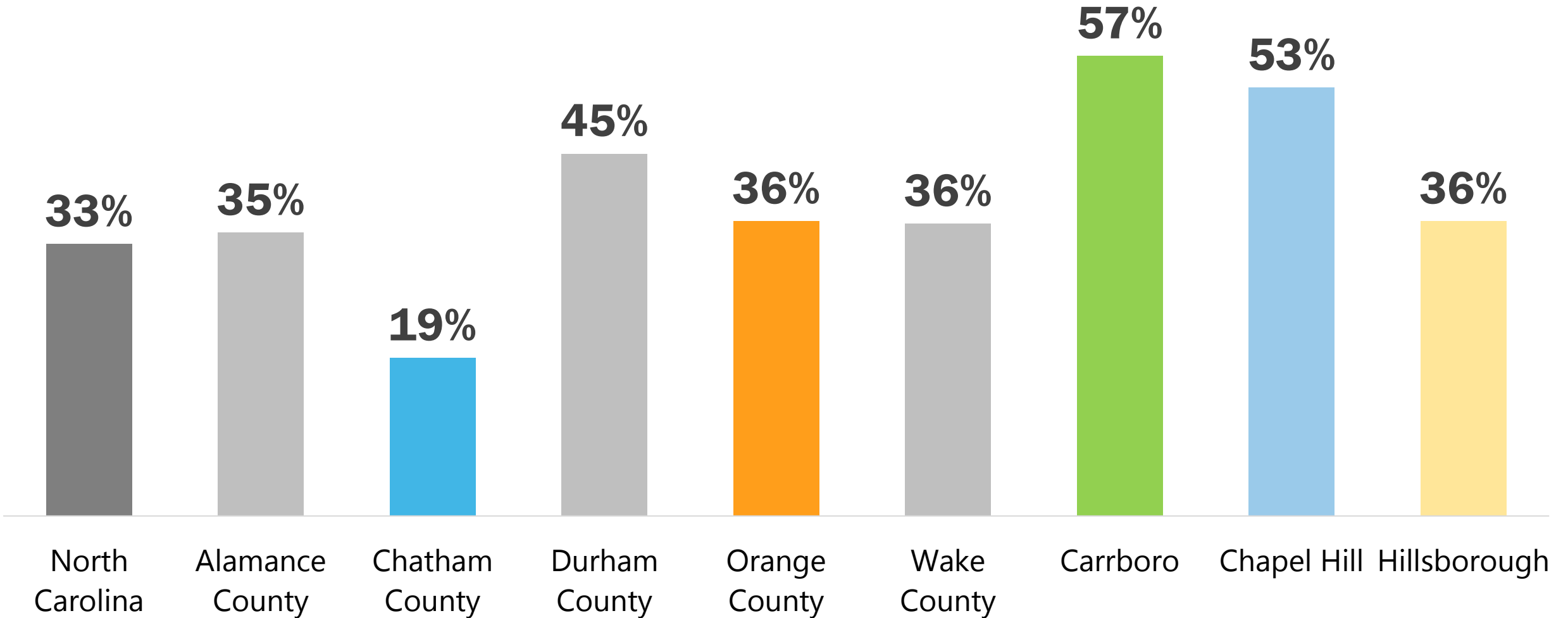


Source: NC Department of Revenue; Zillow

# Housing: Rental

# Percent of Households Renting

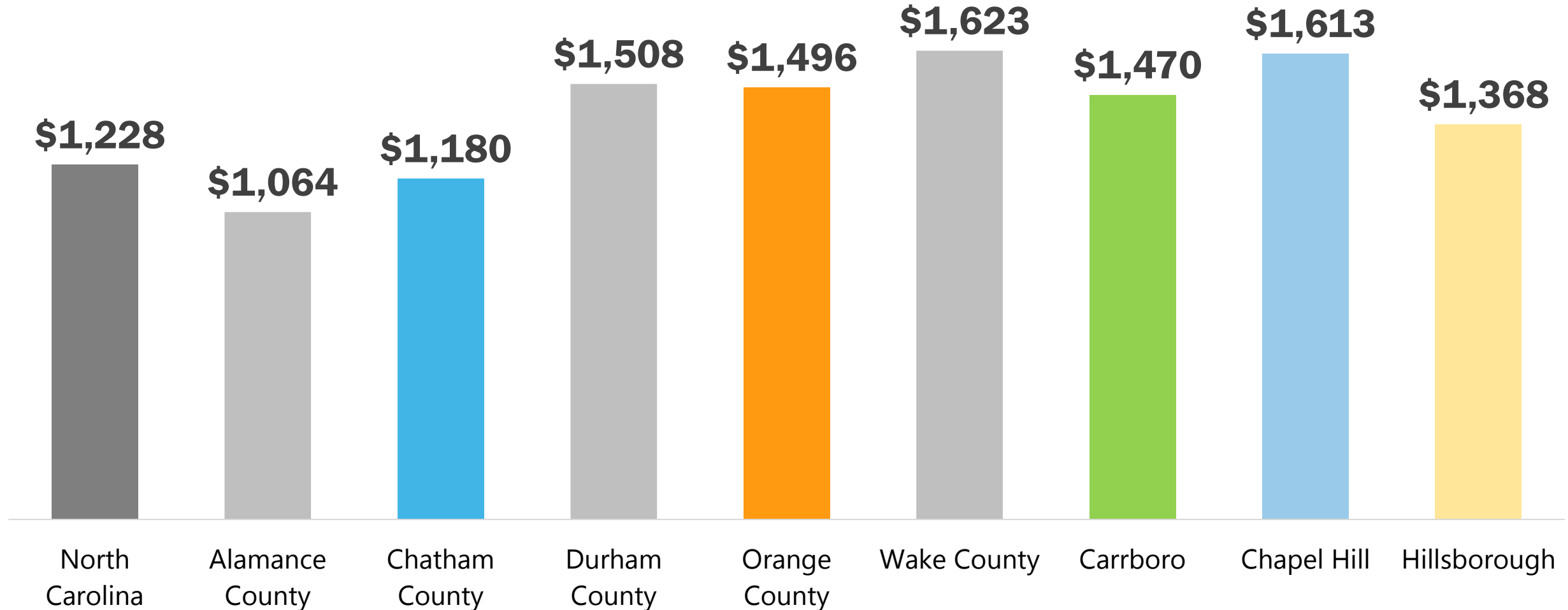
Share of renter-occupied households, 2020-2024 ACS



Source: American Community Survey (2020-2024 5-Year Estimates)

# Median Rent

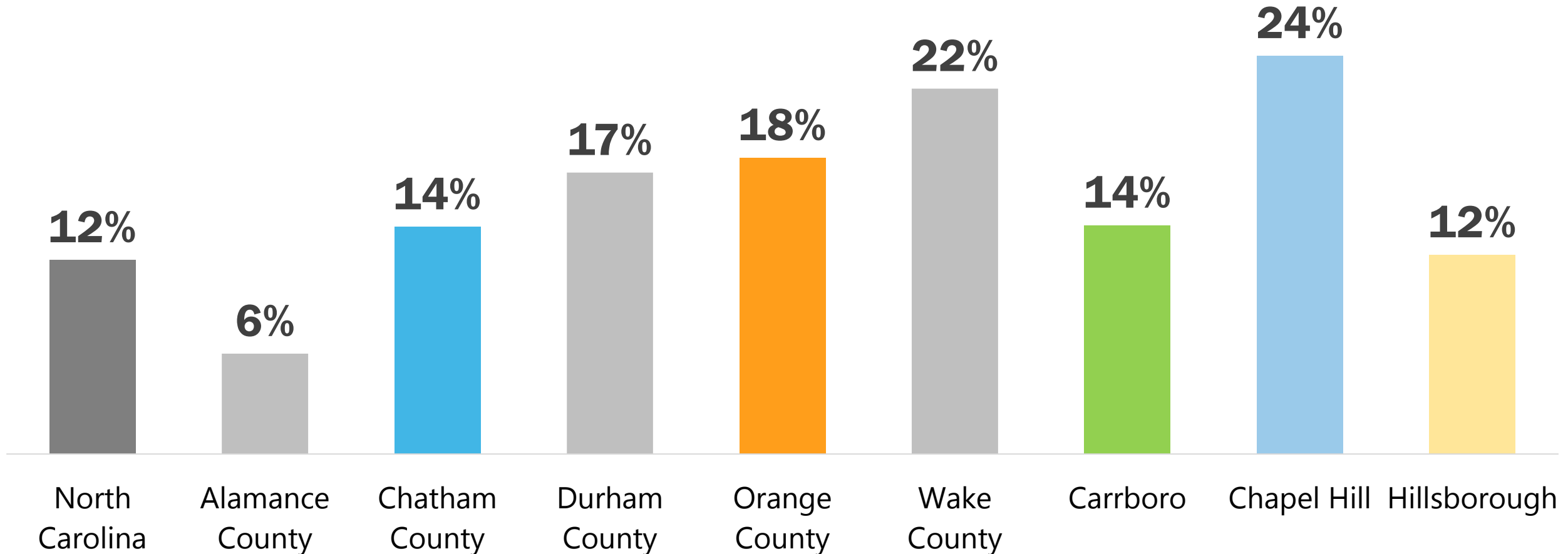
Median rent estimated by the American Community Survey



Source: American Community Survey (2015-2019 & 2020-2024 5-Year Estimates)

# Renters Paying Over \$2,000 per Month

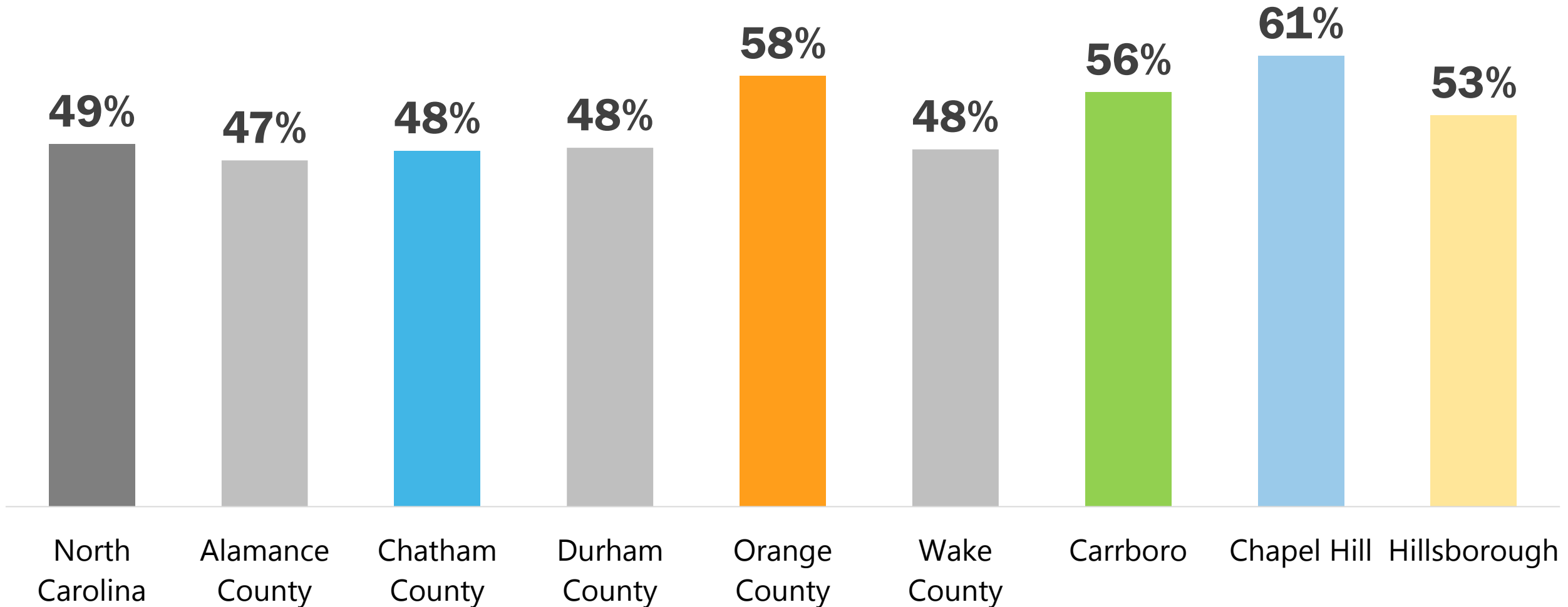
Percentage of renters paying more than \$2,000 per month in rent



Source: American Community Survey (2020-2024 5-Year Estimates)

# Cost-Burdened Renting Households

Percent of households who pay more than 30% of their household income on gross rent



Source: American Community Survey (2020-2024 5-Year Estimates)

# 2025 Housing Wage

Housing Wage = hourly wages needed to afford Fair Market Rent (FMR). For a FMR 2-bedroom unit, Housing Wage is a household income of ~\$74,800 and ~\$65,500 for a 1-bedroom

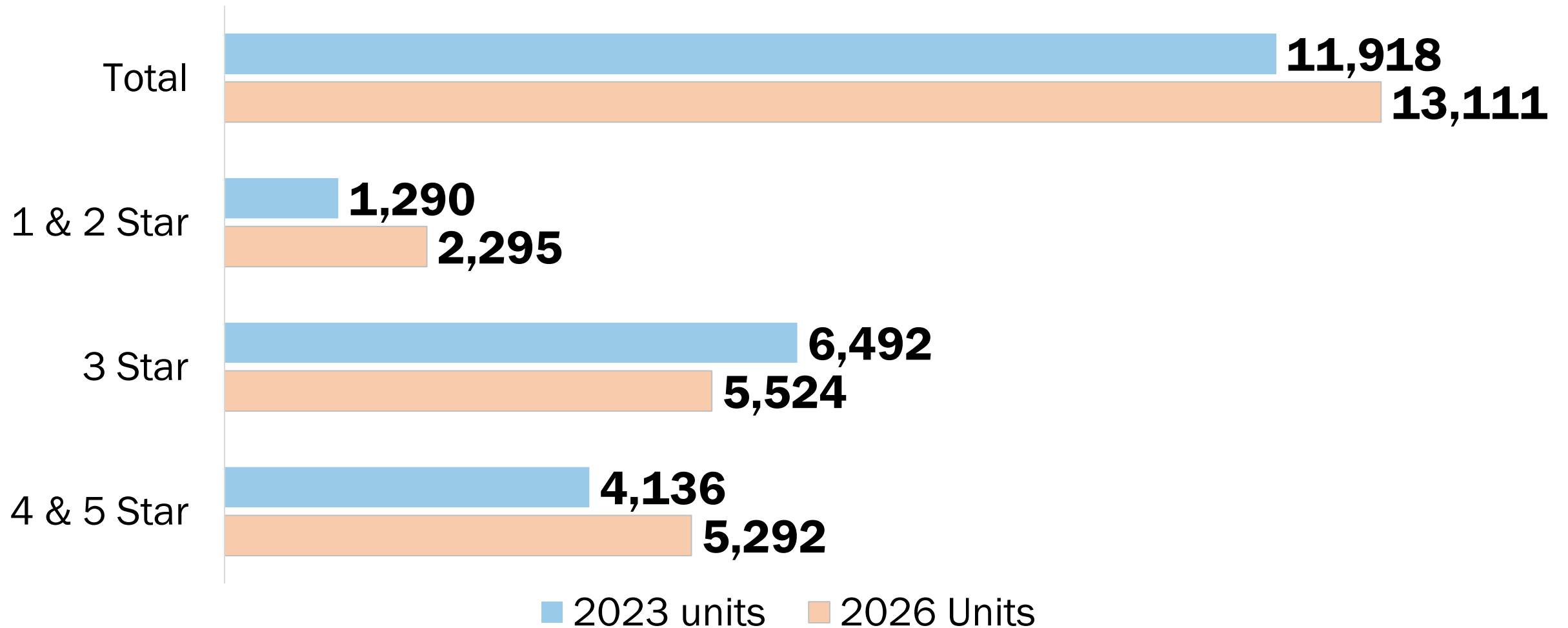
	North Carolina	Durham-Chapel Hill HMFA	Raleigh MSA	Alamance County	Chatham County	Orange County
0 Bedroom	\$22.56	<b>\$29.77</b>	\$29.48	\$16.71	\$29.77	<b>\$29.77</b>
1 Bedroom	\$23.69	<b>\$31.48</b>	\$30.62	\$21.13	\$31.48	<b>\$31.48</b>
2 Bedroom	\$27.14	<b>\$36.00</b>	\$33.90	\$23.40	\$36.00	<b>\$36.00</b>
3 Bedroom	\$34.62	<b>\$44.88</b>	\$42.15	\$29.46	\$44.88	<b>\$44.88</b>
4 Bedroom	\$42.83	<b>\$53.98</b>	\$56.94	\$34.73	\$53.98	<b>\$53.98</b>

Note: Durham-Chapel Hill HMFA includes Orange, Durham, Chatham, and Person Counties though Person FMR is calculated separately

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

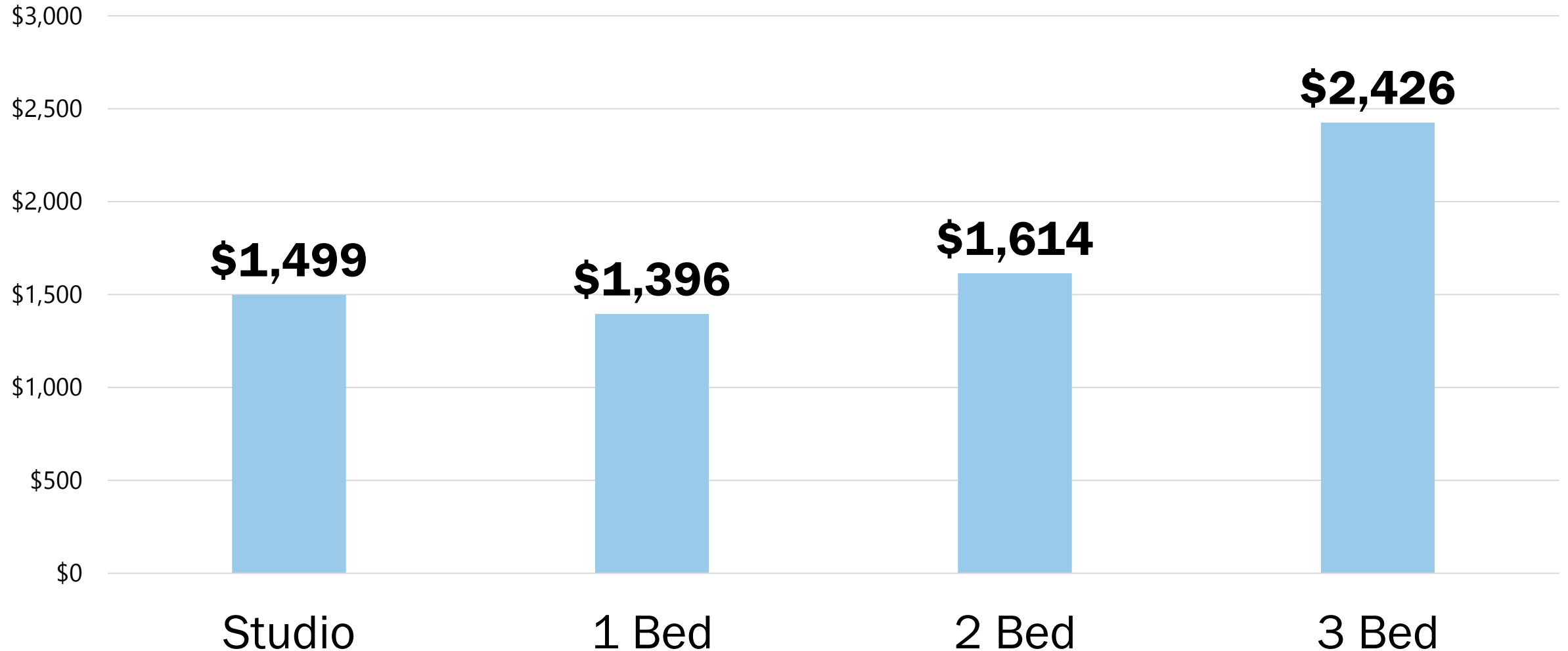
# Multifamily Units in Chapel Hill-Carrboro

Number of units in 2023 vs. 2026, by star rating



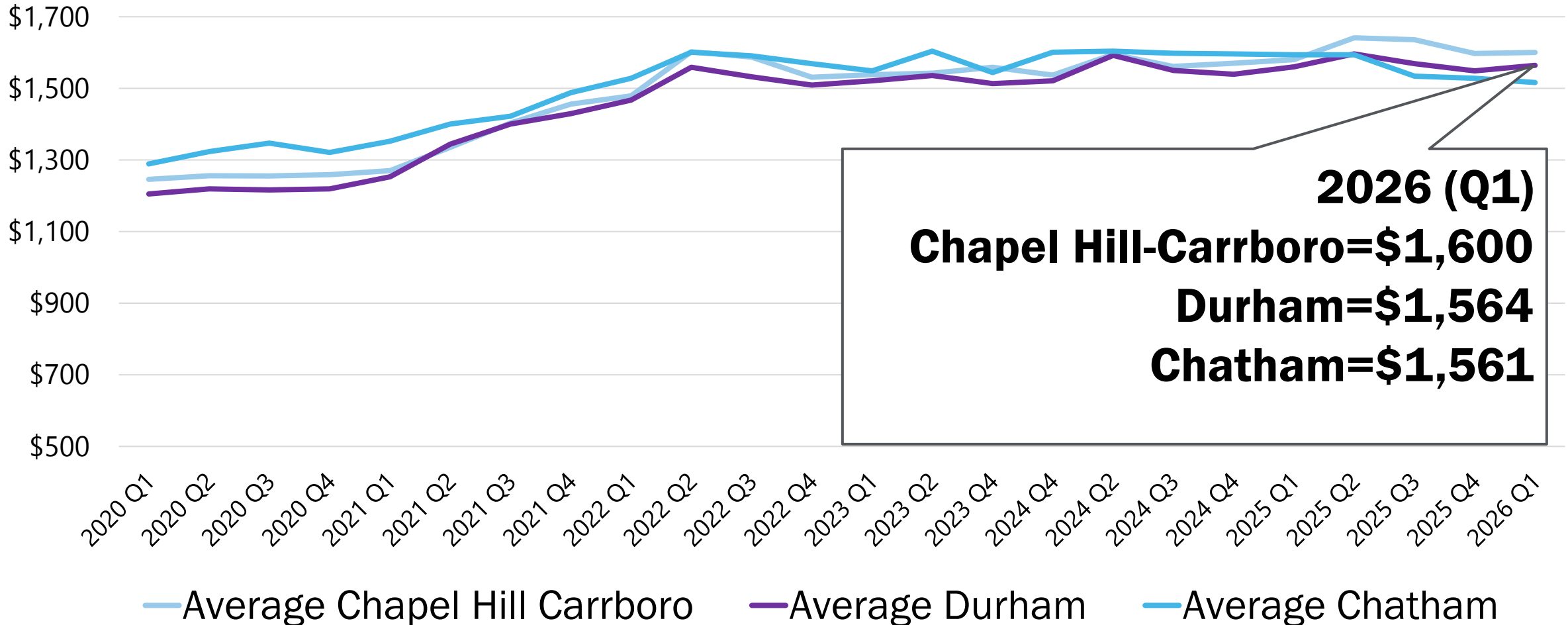
# Multifamily Average Asking Rent in Chapel Hill-Carrboro

Chapel Hill-Carrboro multifamily average asking rent, Q1 2026



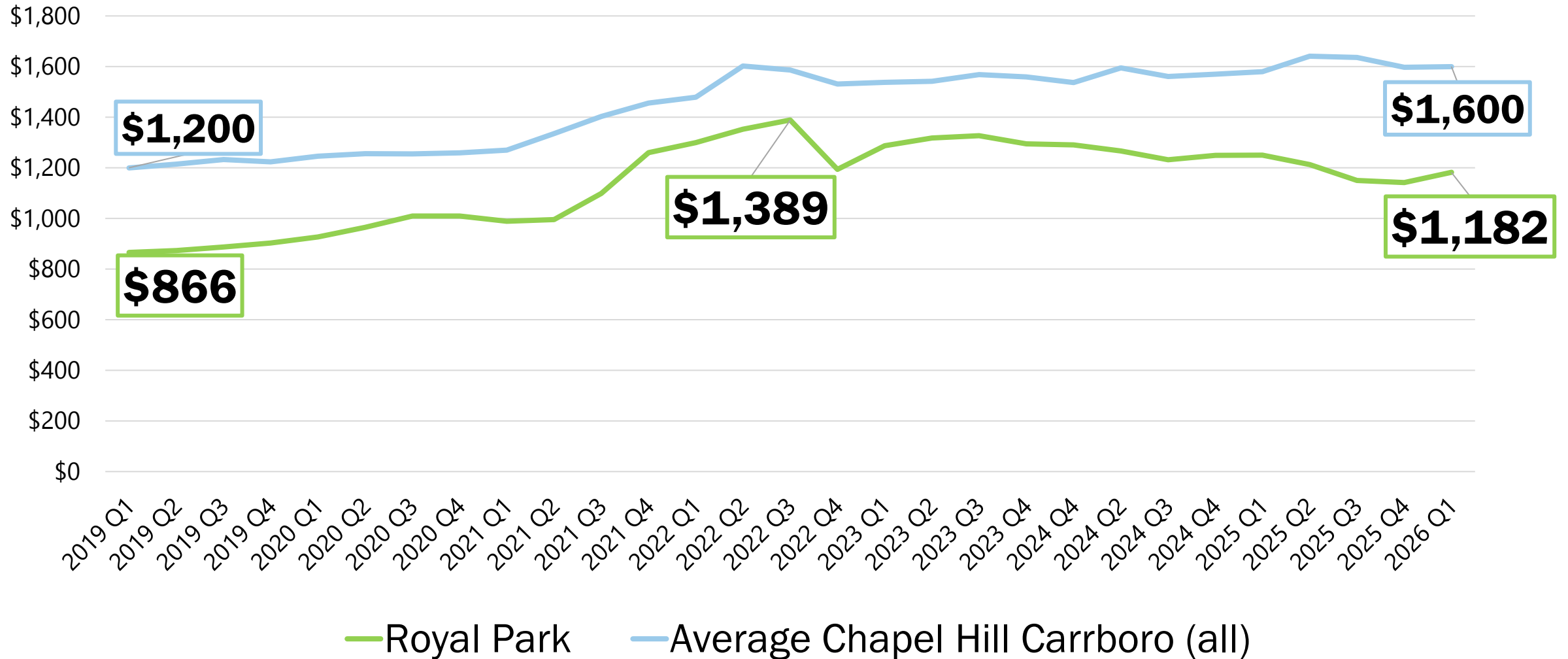
# Multifamily Asking Rent

Average multifamily asking rent in Chatham, Chapel Hill-Carrboro, and Durham



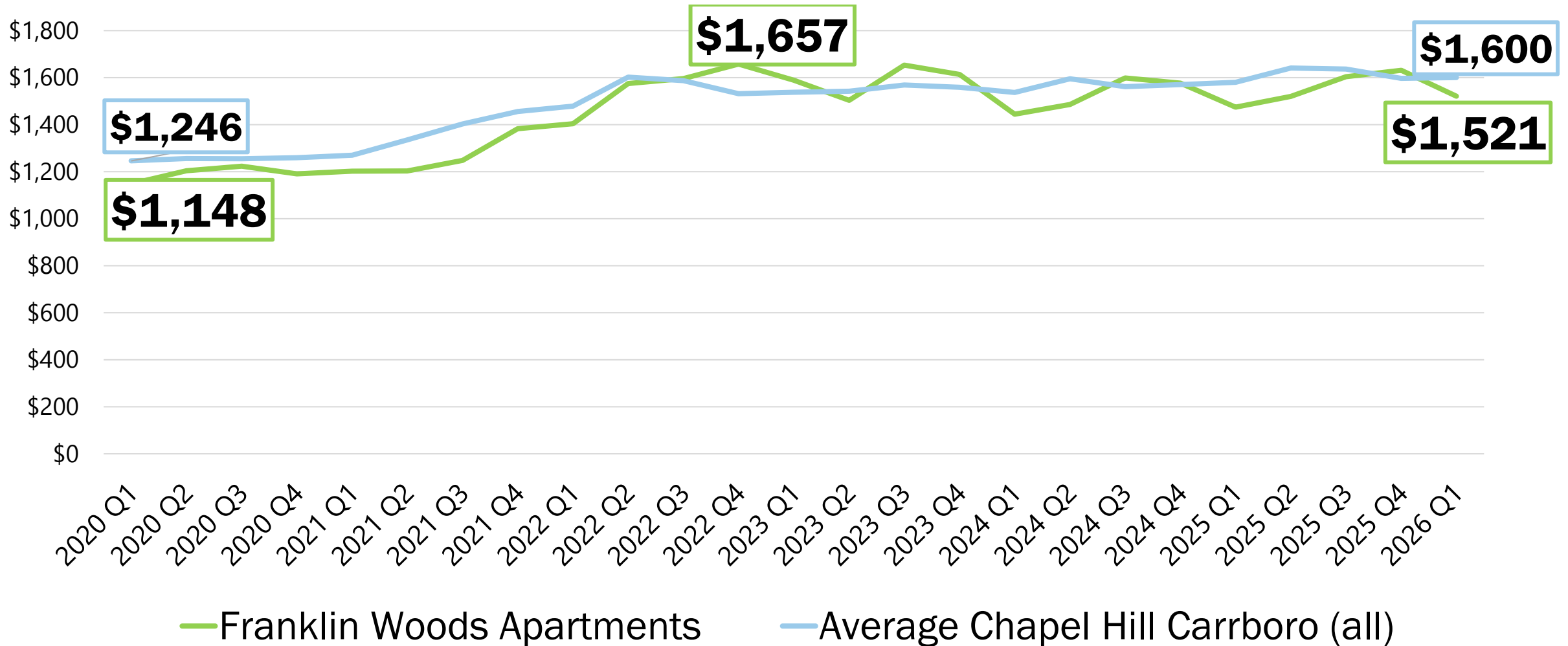
# Royal Park Apartments (Carrboro)

Change in average asking rent Q1 2020 through Q1 2026



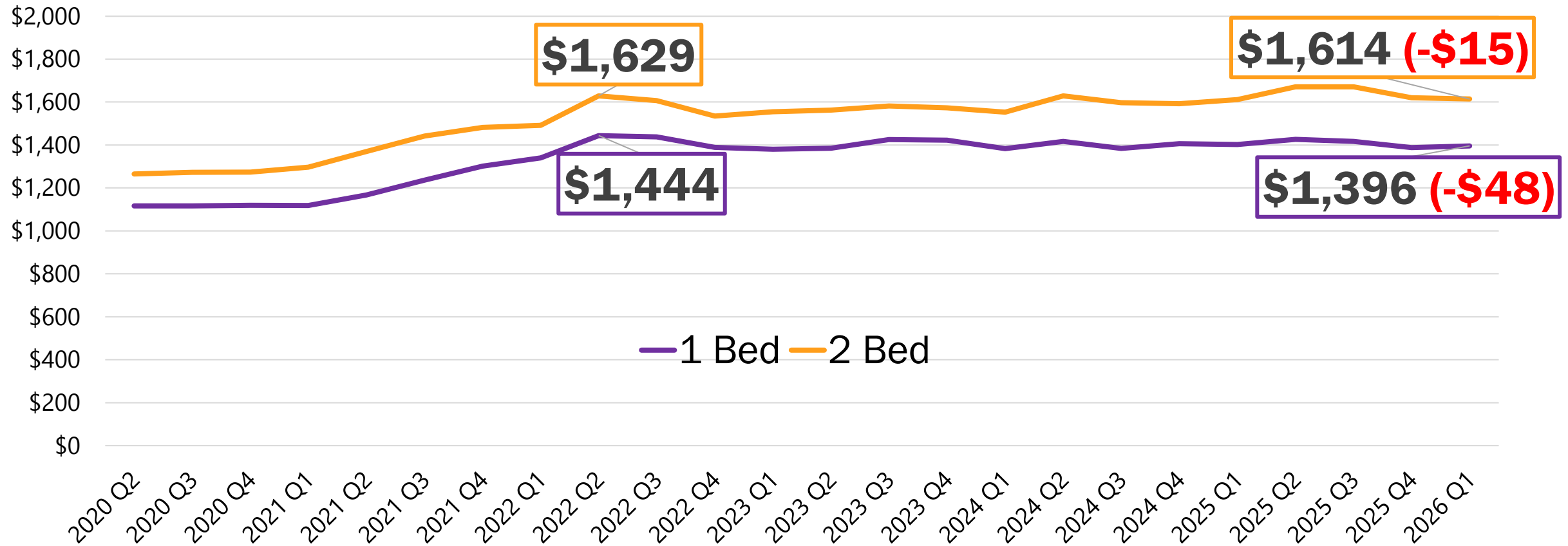
# Franklin Woods Apartments (Chapel Hill)

Change in average asking rent Q1 2020 through Q1 2026



# 1 and 2-Bedroom Multifamily Average Rent Declines since Q2 2022

Average Chapel Hill-Carrboro rental rates for 1 and 2 bedroom units, Q1 2020 – Q1 2026



# Housing: Homelessness

# Homelessness in Orange County

Orange County 2025 point in time count

**149**

people experiencing  
homelessness

**48**

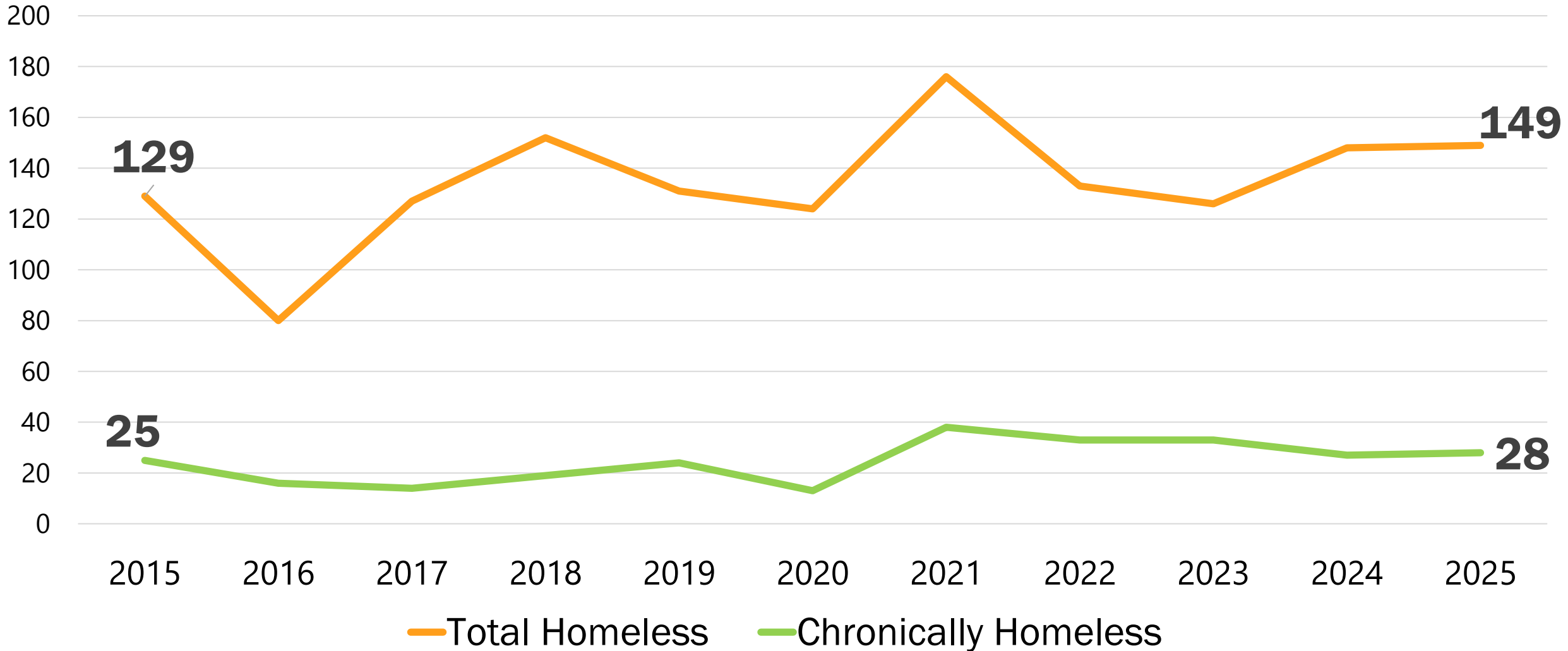
people living  
unsheltered

**28**

people considered  
chronically homeless

# Homelessness in Orange County

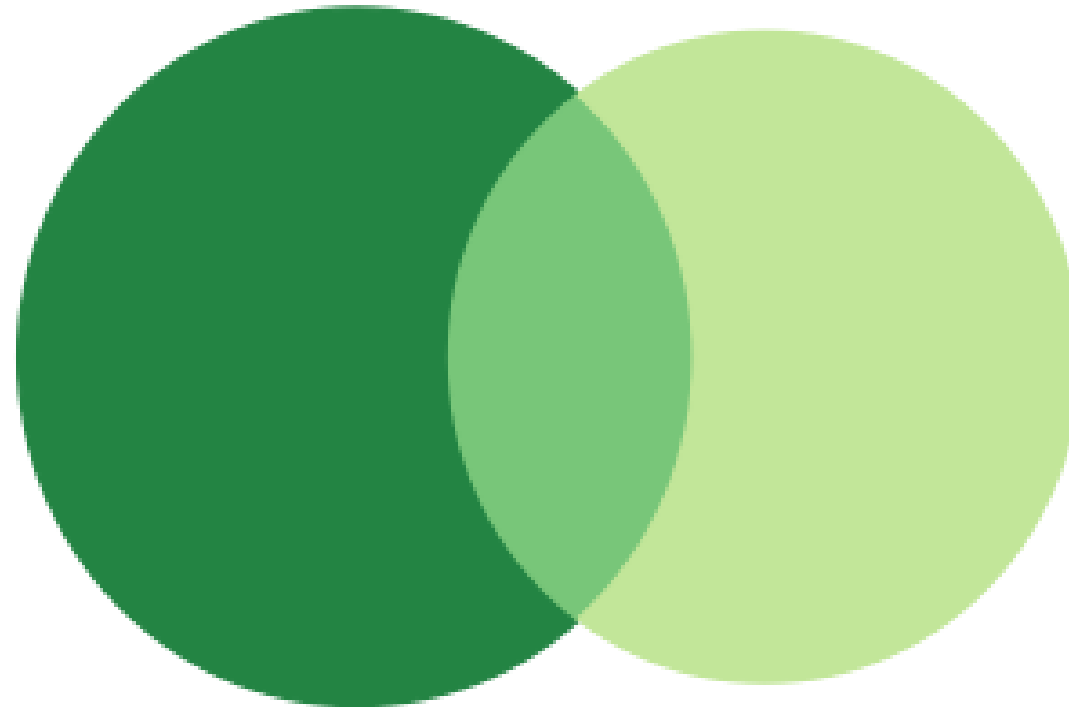
Annual number of individuals experiencing homelessness identified in Orange County's annual point-in-time count, 2014-2025



# Commuting

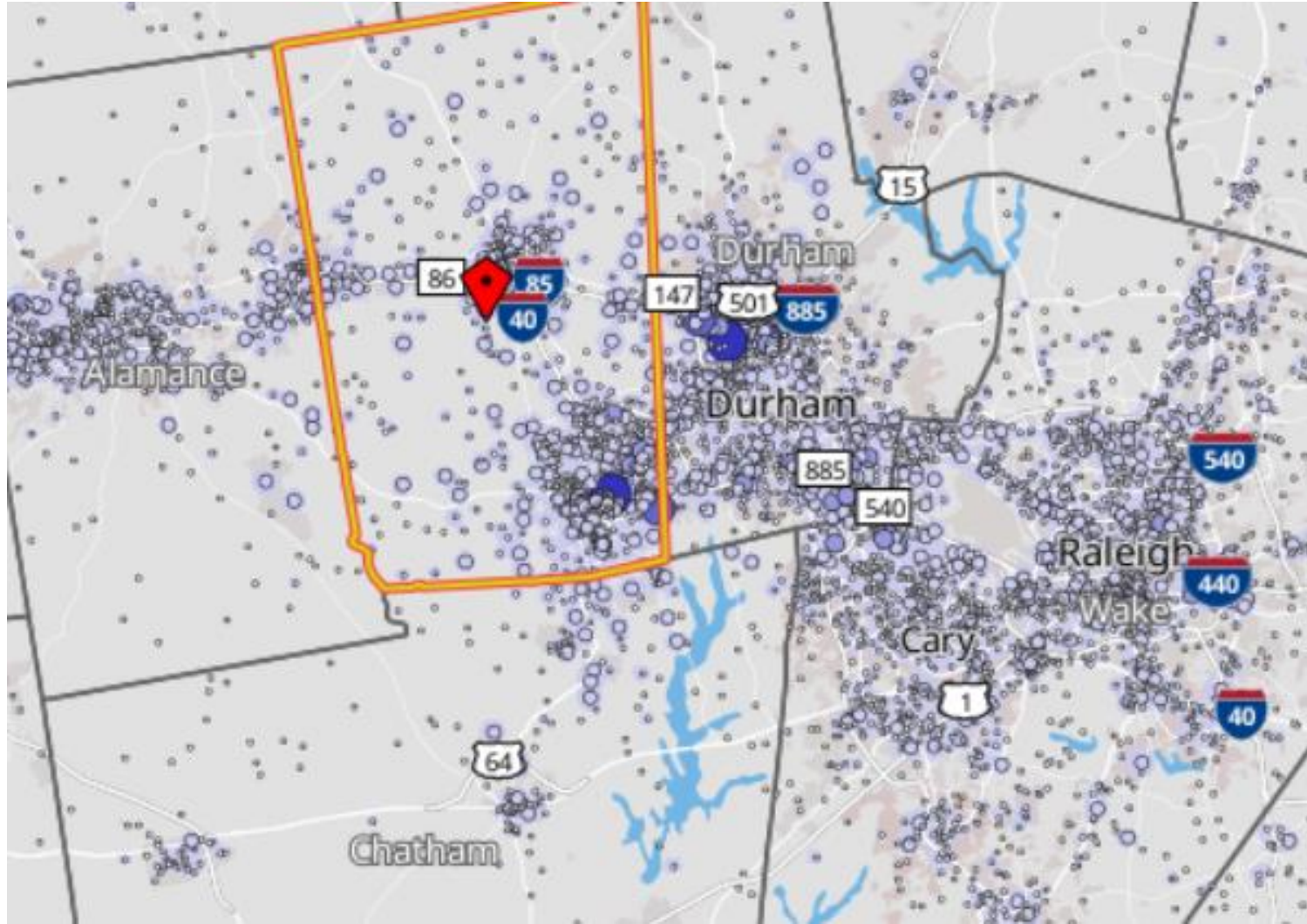
# Orange County Worker Inflow/Outflow

51,905 drive in, 42,681 drive out, and 18,316 live and work in Orange County

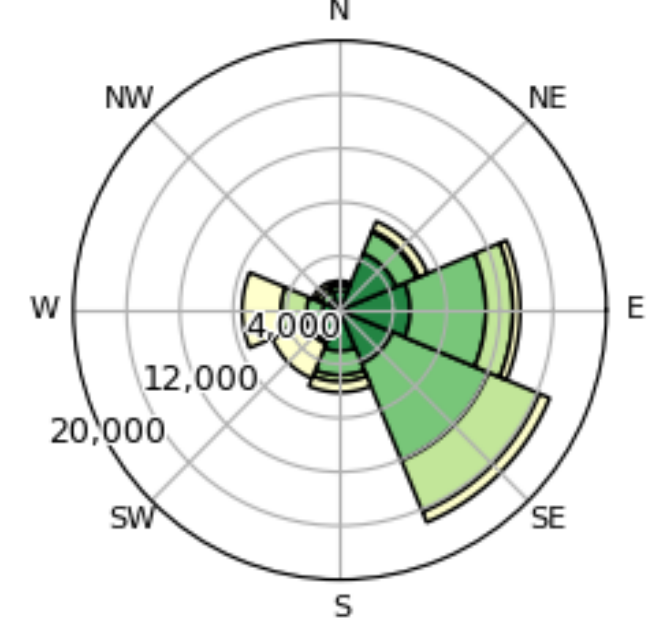


	51,905 - Employed in Selection Area, Live Outside
	42,681 - Live in Selection Area, Employed Outside
	18,316 - Employed and Live in Selection Area

# Employment Location of Orange County's 60,997 Working Residents



Job Counts by Distance/Direction in 2023  
All Workers



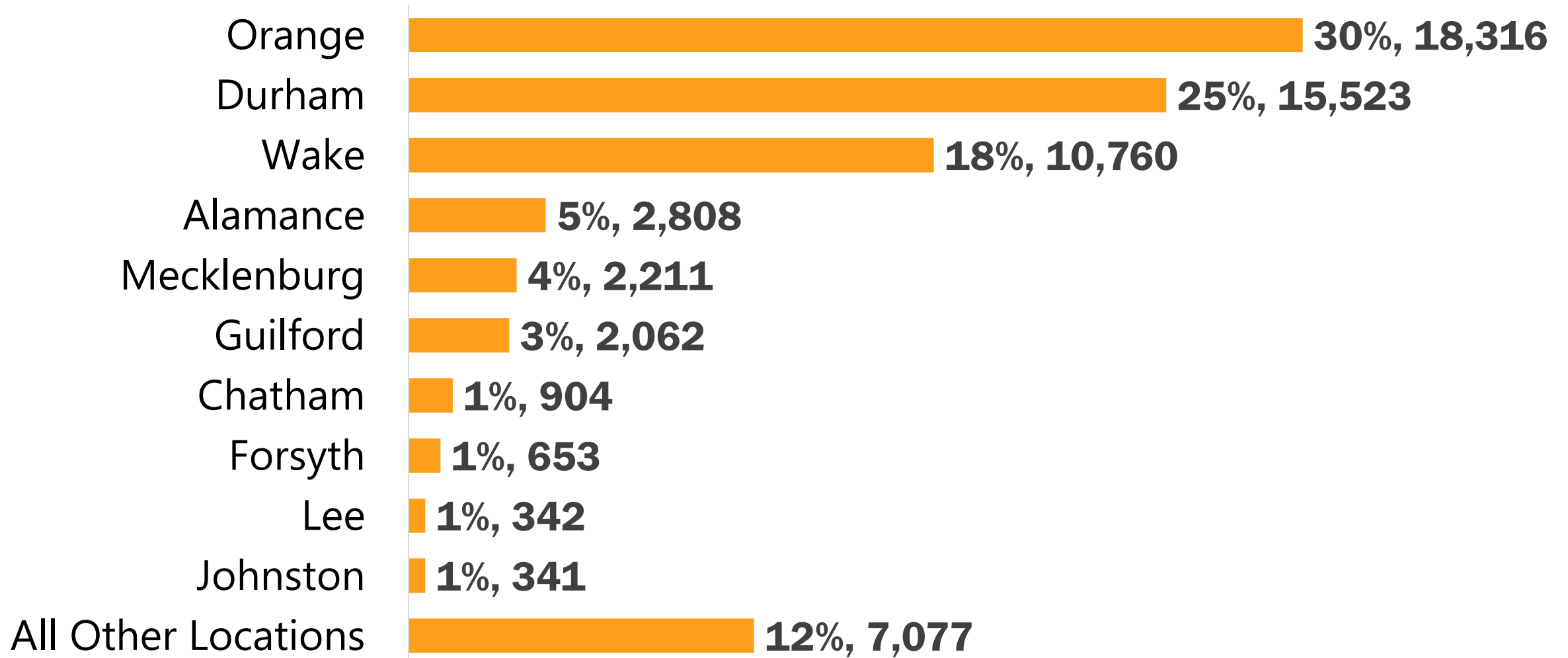
Jobs by Distance - Home Census Block to Work Census Block

	2023	
	Count	Share
Total Primary Jobs	60,997	100.0%
Less than 10 miles	22,891	37.5%
10 to 24 miles	19,527	32.0%
25 to 50 miles	9,483	15.5%
Greater than 50 miles	9,096	14.9%

Source: US Census Bureau LODES 2023 (OnTheMap)

# Where do Orange County's Residents Work?

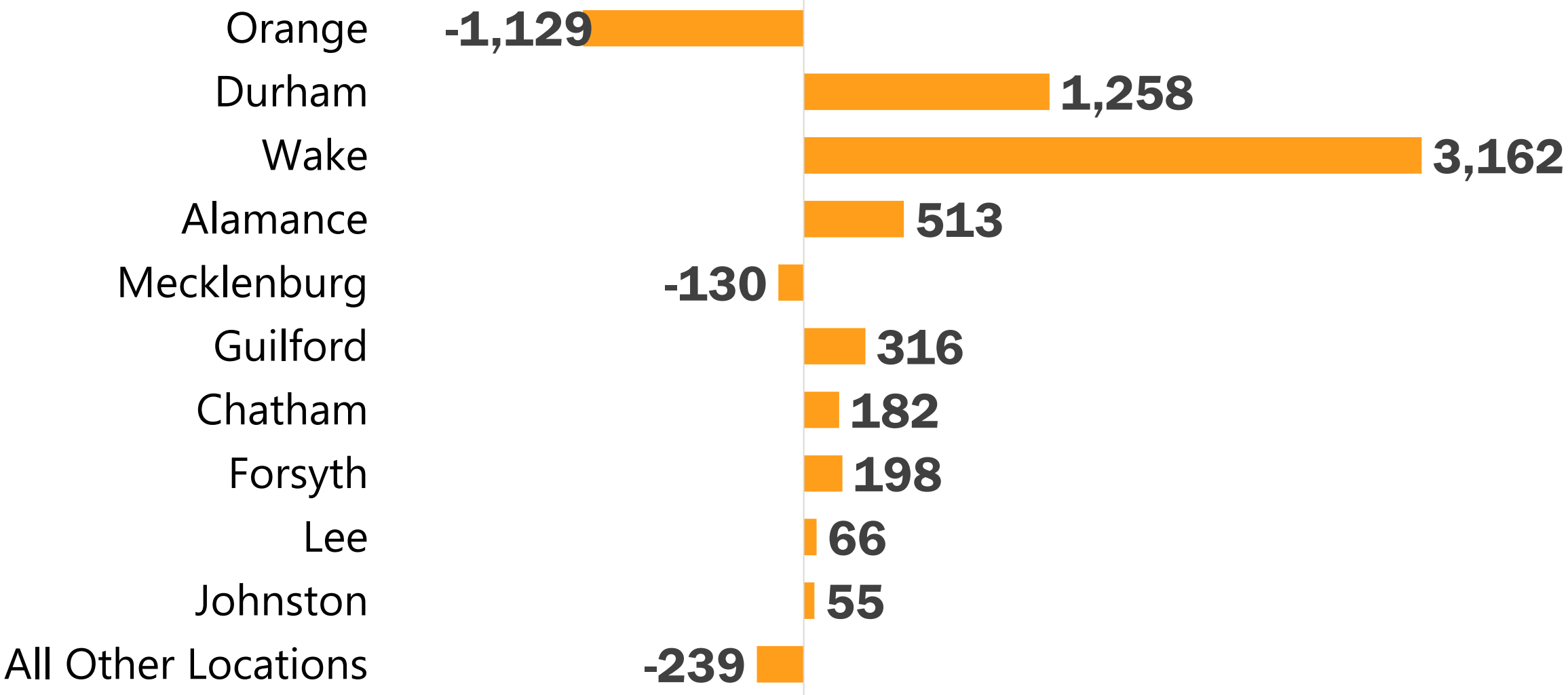
Location of primary job for the 60,997 working residents of Orange County, 2023



Source: US Census Bureau LODES 2023 (OnTheMap)

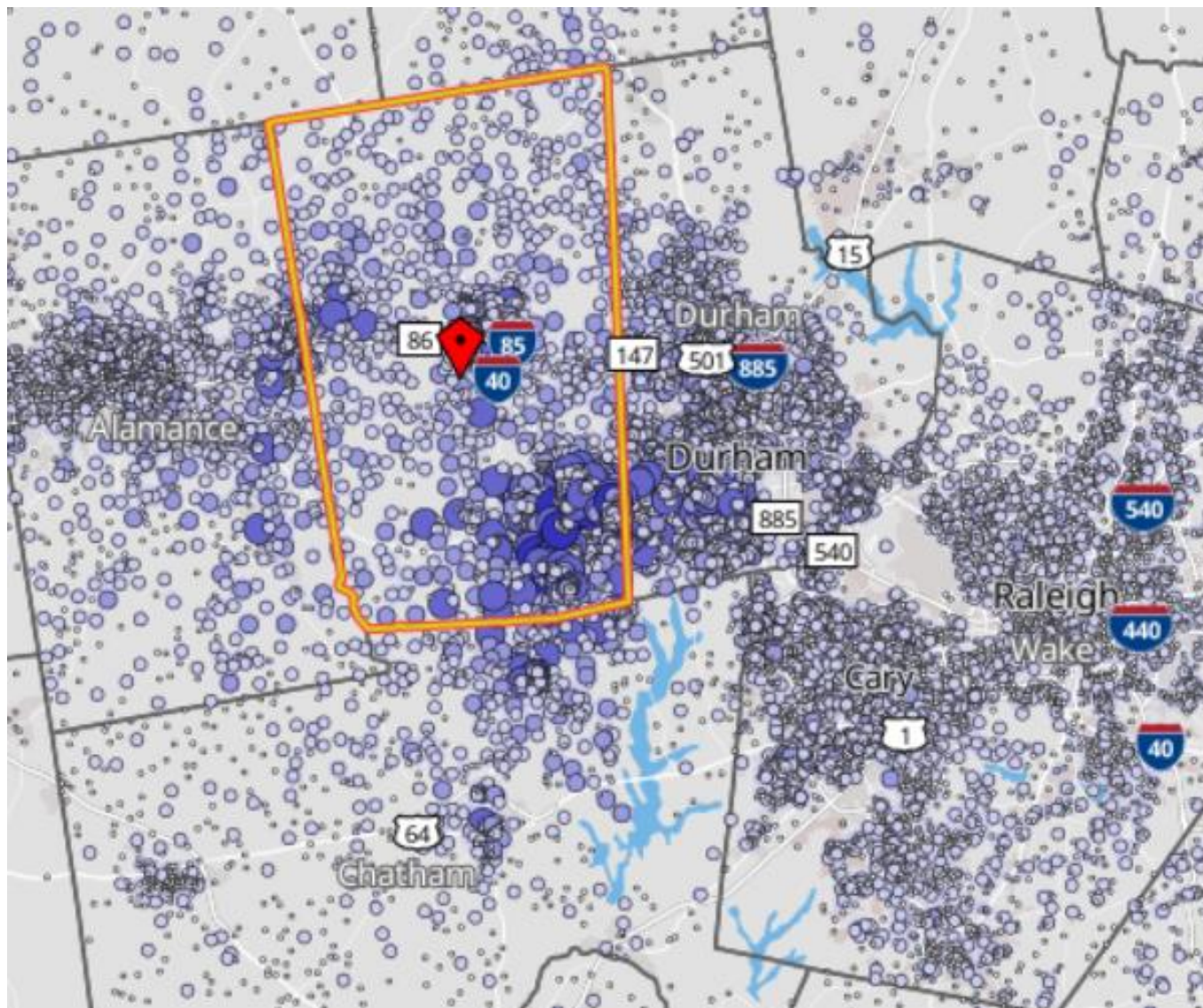
# Change in Location of Orange County Residents' Primary Job

By county, from 2013-2023

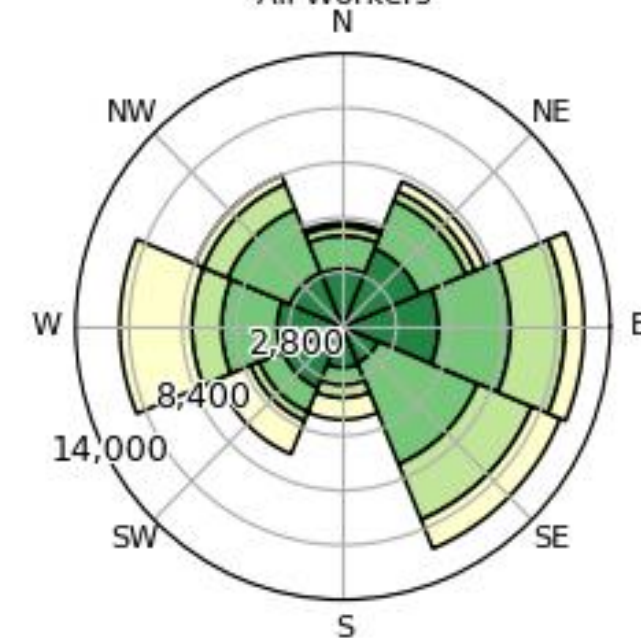


Source: US Census Bureau LODES 2023 (OnTheMap)

# Residential Location of the 70,221 People Working in Orange County



Job Counts by Distance/Direction in 2023  
All Workers

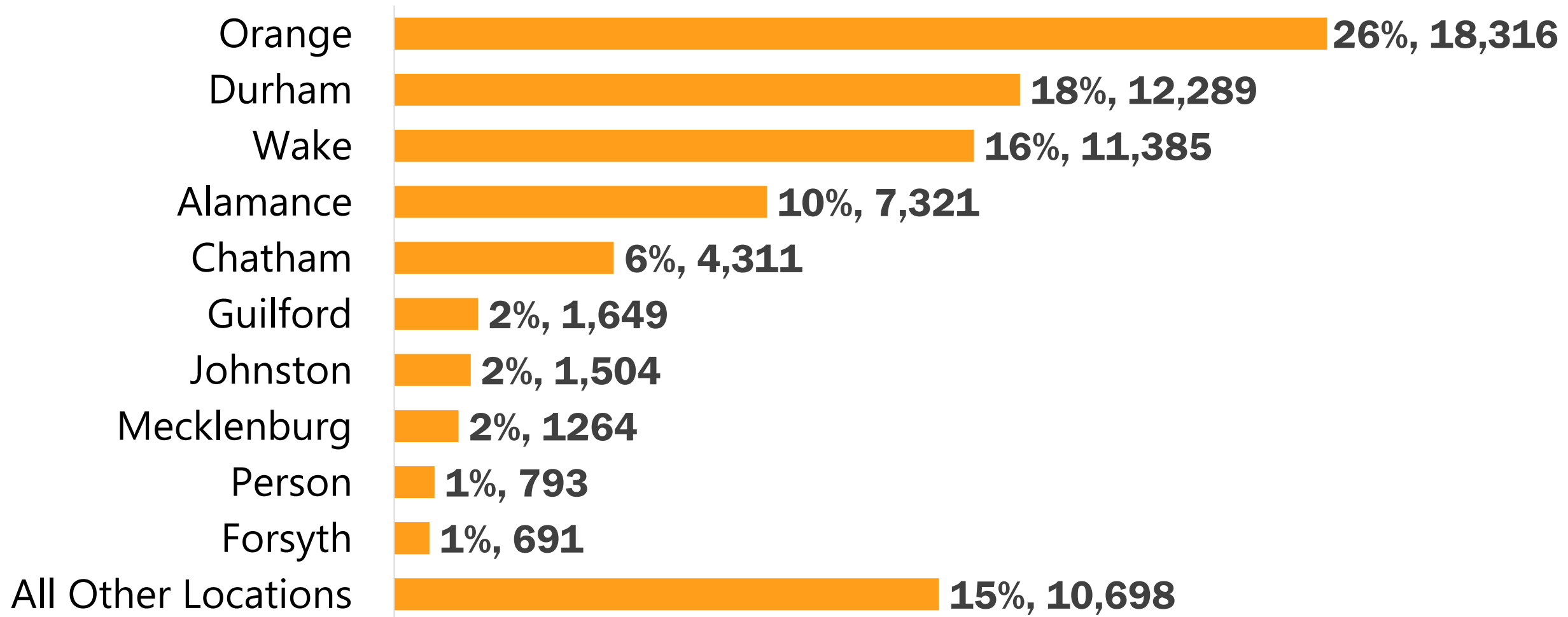


**Jobs by Distance - Work Census Block to Home Census Block**

	2023	
	Count	Share
Total Primary Jobs	70,221	100.0%
Less than 10 miles	26,268	37.4%
10 to 24 miles	22,381	31.9%
25 to 50 miles	11,021	15.7%
Greater than 50 miles	10,551	15.0%

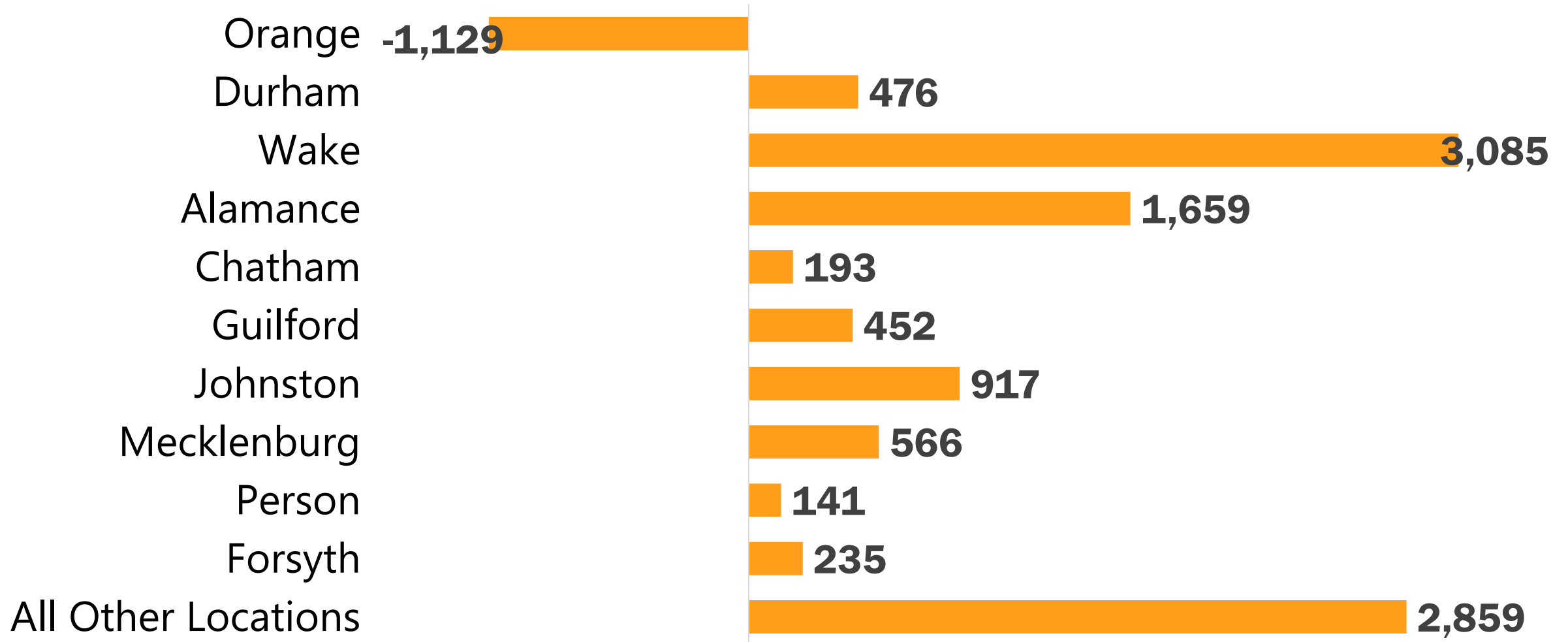
# Where do Orange County's Workers Live?

Orange County's 70,221 workers by county of residence

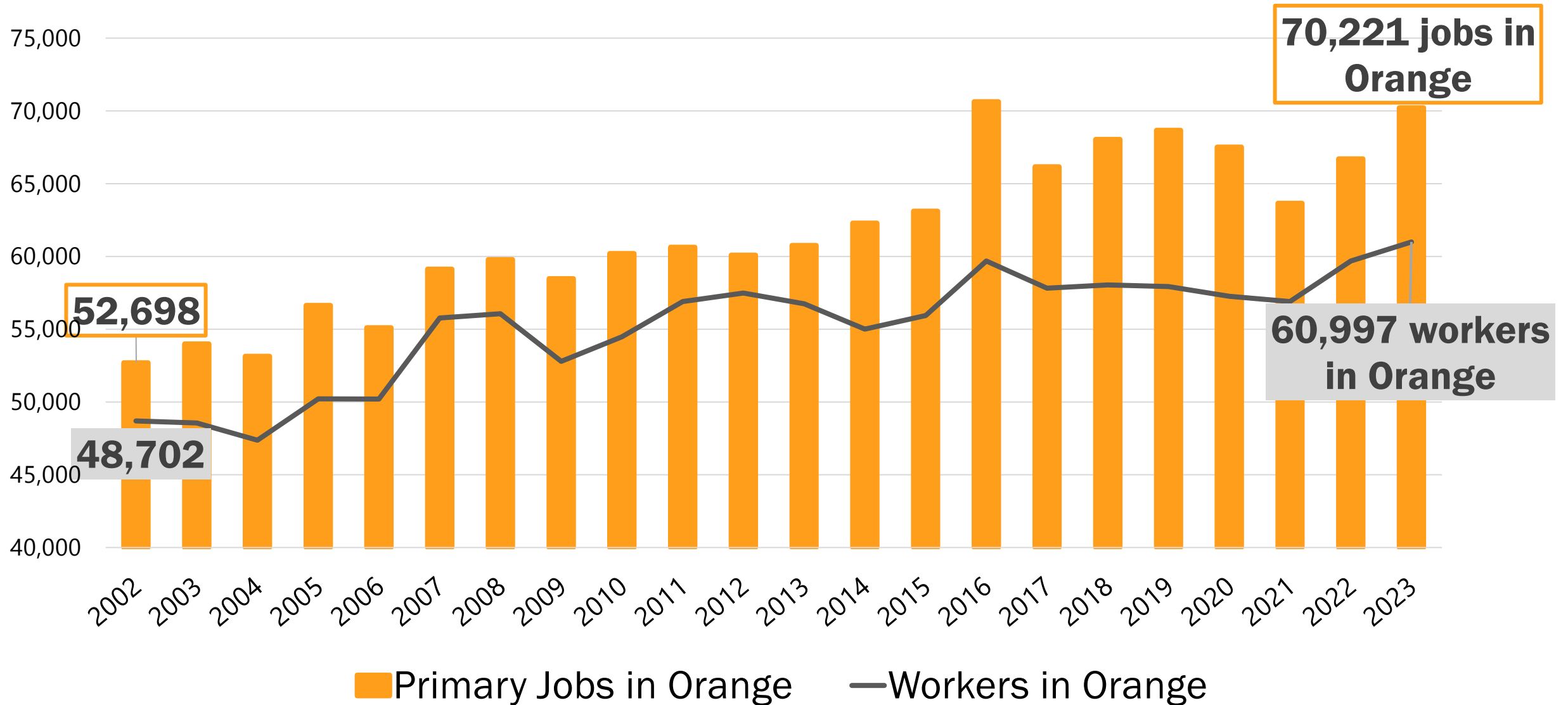


# Change in Orange Co. Workers County of Residence

From 2013-2023 (10,136 net new jobs)

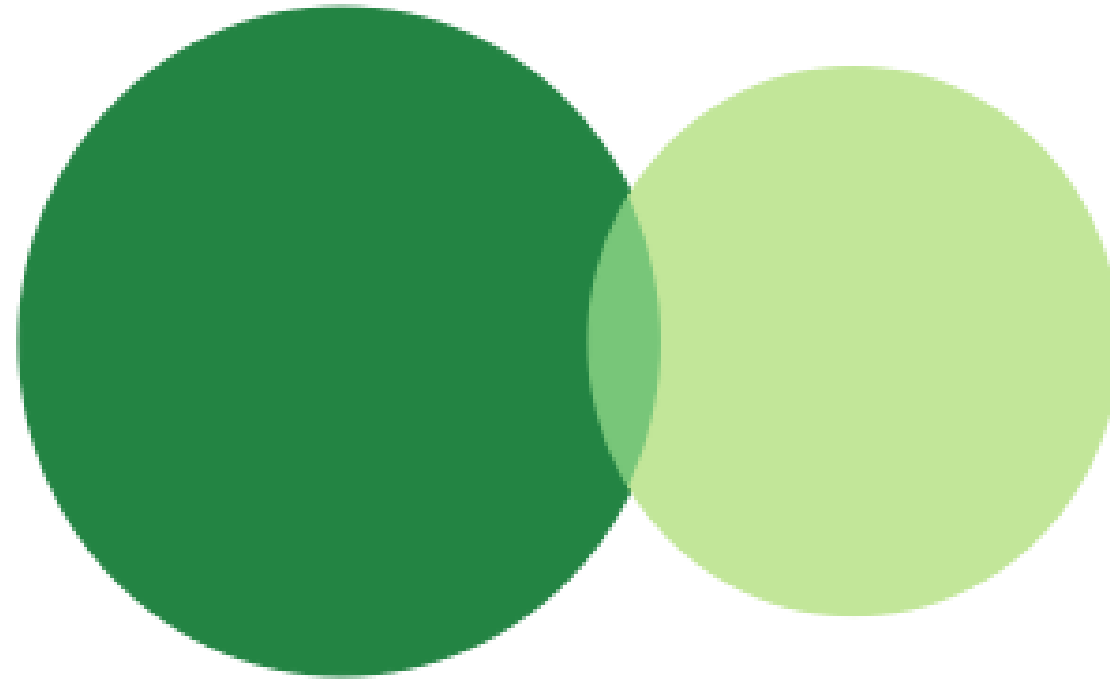


# Number of Jobs vs. Number of Workers – Orange



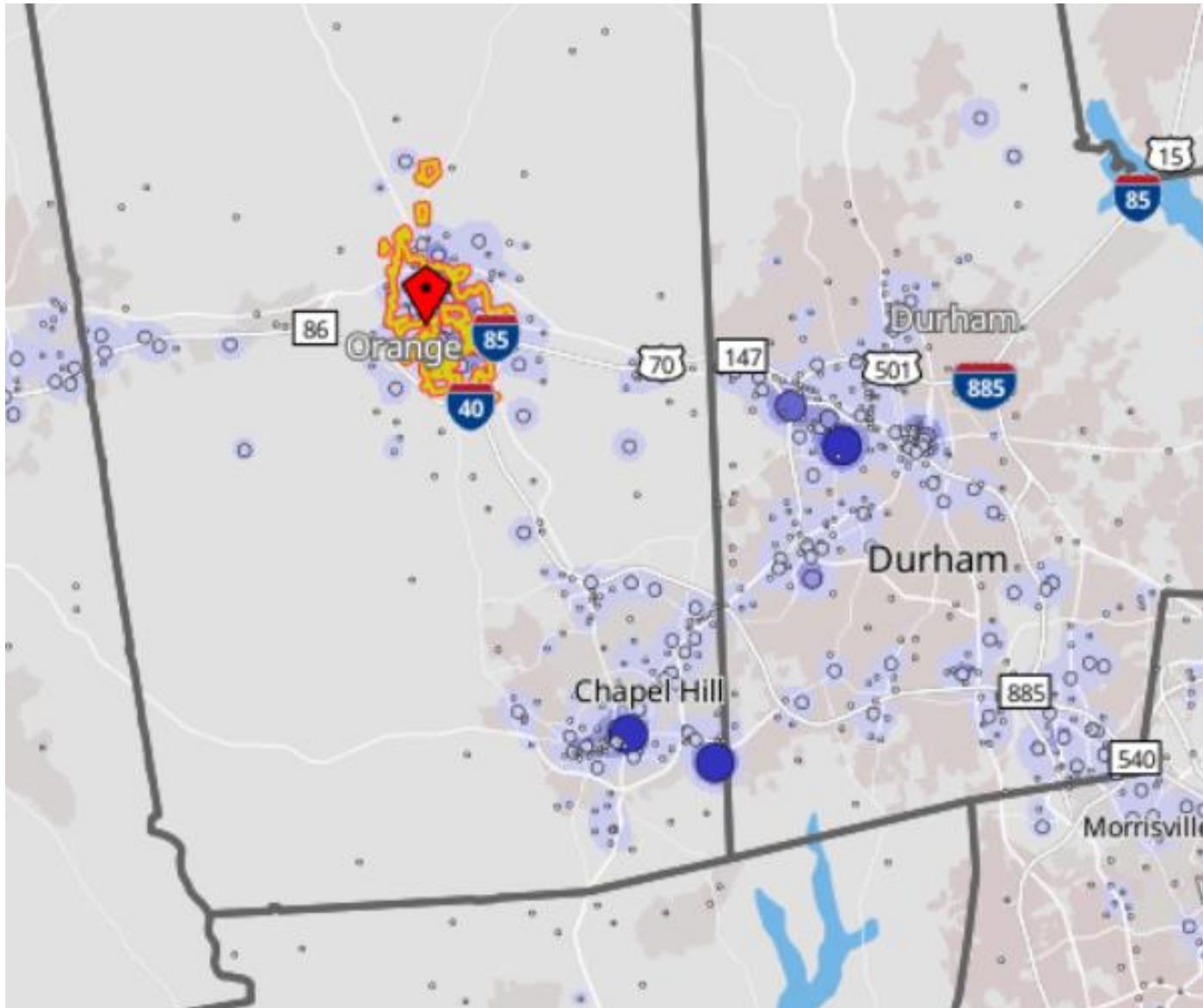
# Hillsborough Worker Inflow/Outflow

6,322 drive in, 4,131 drive out, and 362 live and work in Hillsborough (2023)

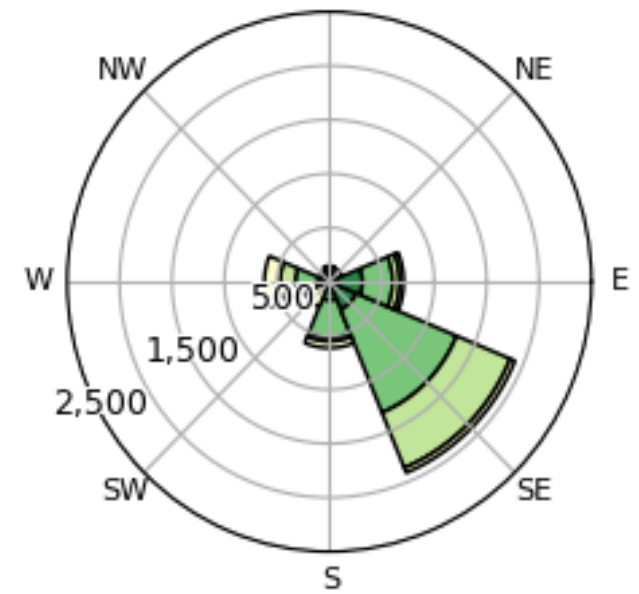


- 6,322 - Employed in Selection Area, Live Outside
- 4,131 - Live in Selection Area, Employed Outside
- 362 - Employed and Live in Selection Area

# Employment Location of Hillsborough's 4,493 Working Residents



Job Counts by Distance/Direction in 2023  
All Workers  
N



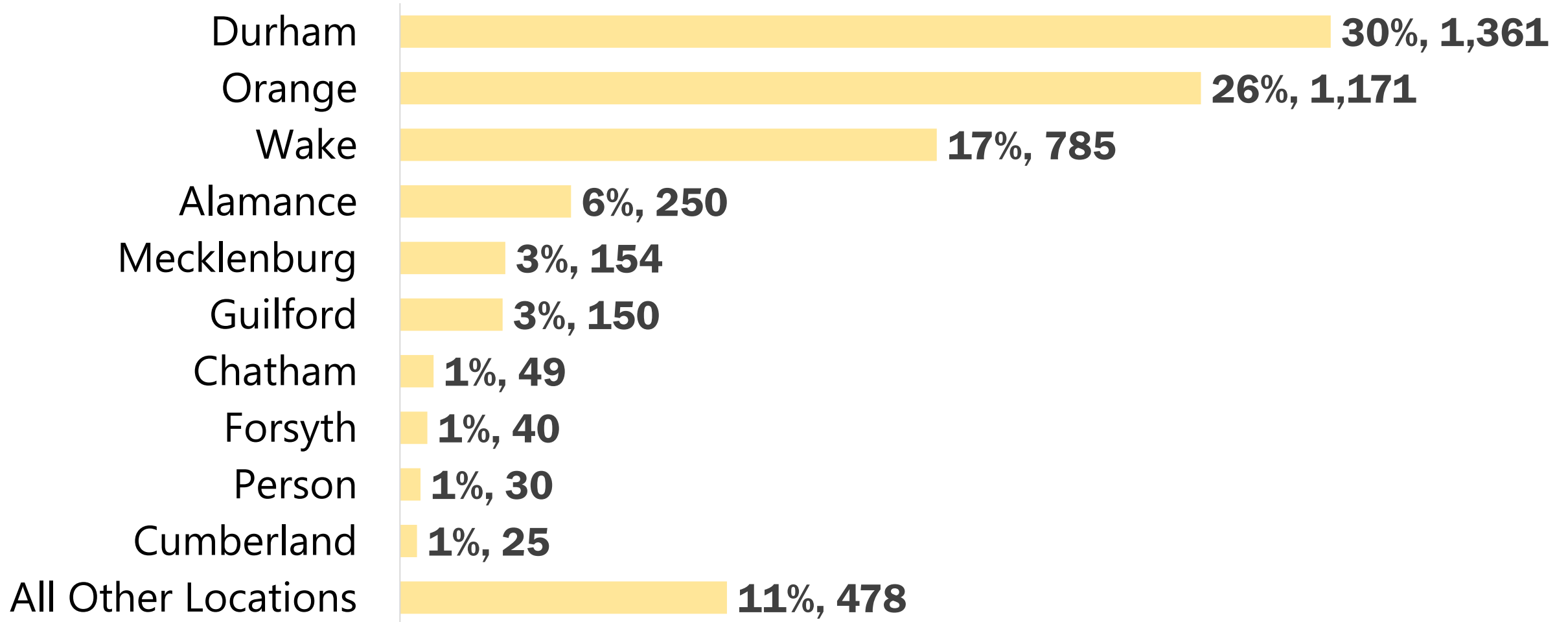
Jobs by Distance - Home Census Block to Work Census Block

	2023	
	Count	Share
Total Primary Jobs	4,493	100.0%
Less than 10 miles	1,137	25.3%
10 to 24 miles	1,919	42.7%
25 to 50 miles	852	19.0%
Greater than 50 miles	585	13.0%

Source: US Census Bureau LODES 2023 (OnTheMap)

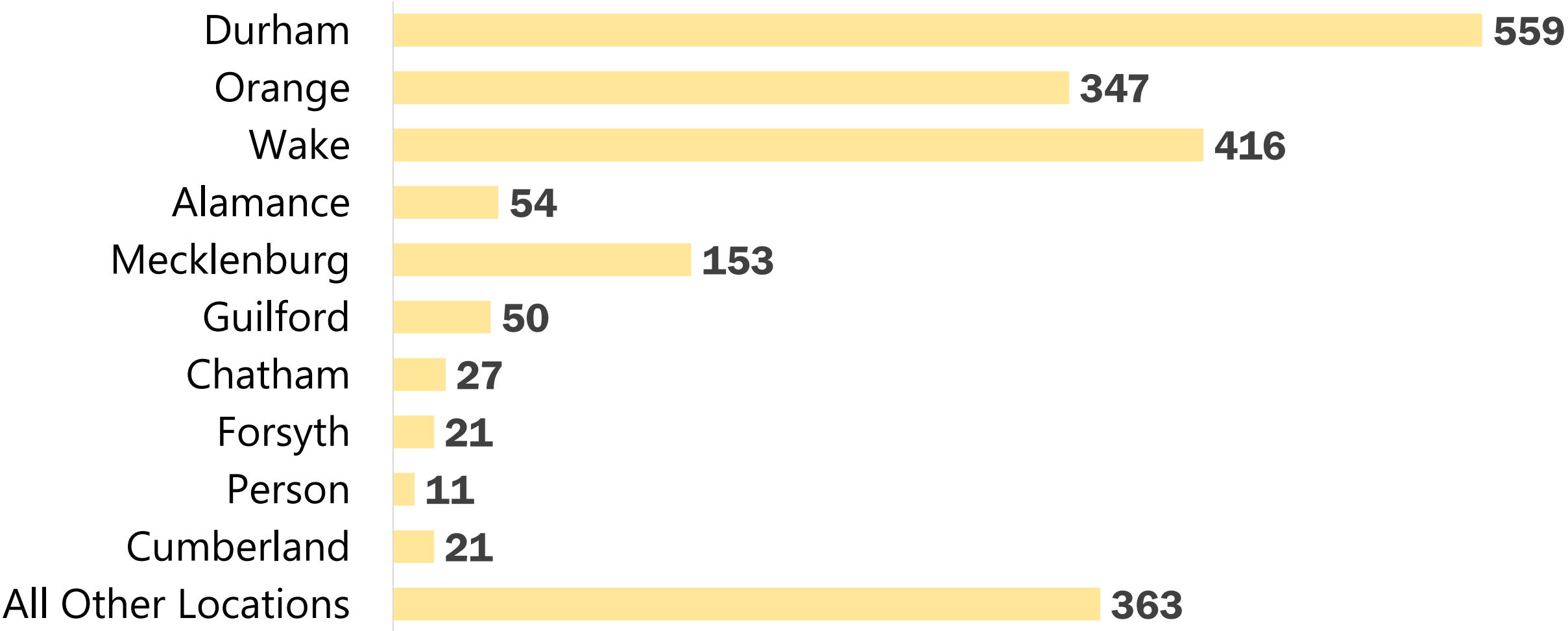
# Where do Hillsborough's Residents Work?

Location of primary job for 4,493 working residents of Hillsborough



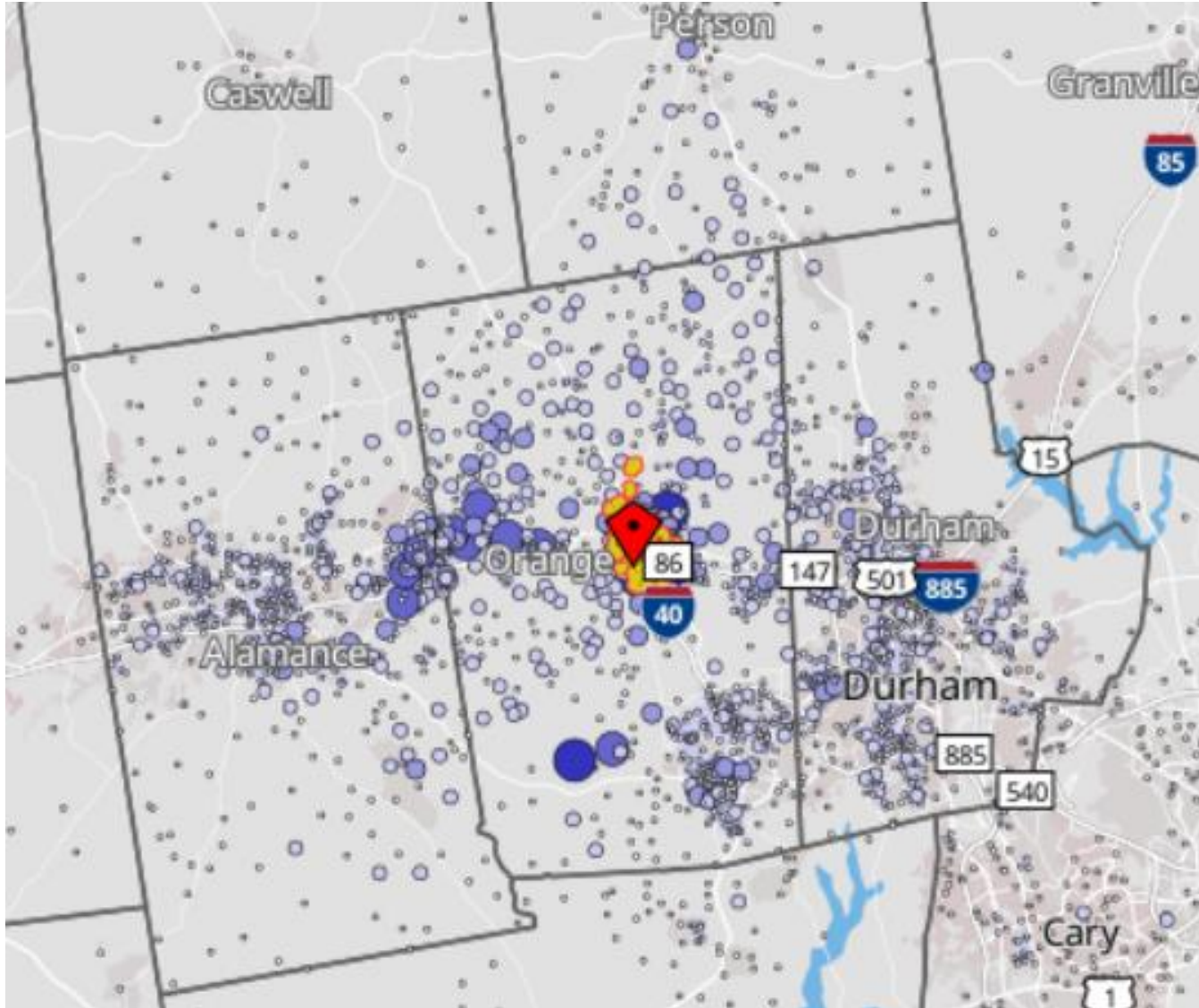
# Change in Location of Hillsborough Residents' Primary Job

By county, from 2013-2023

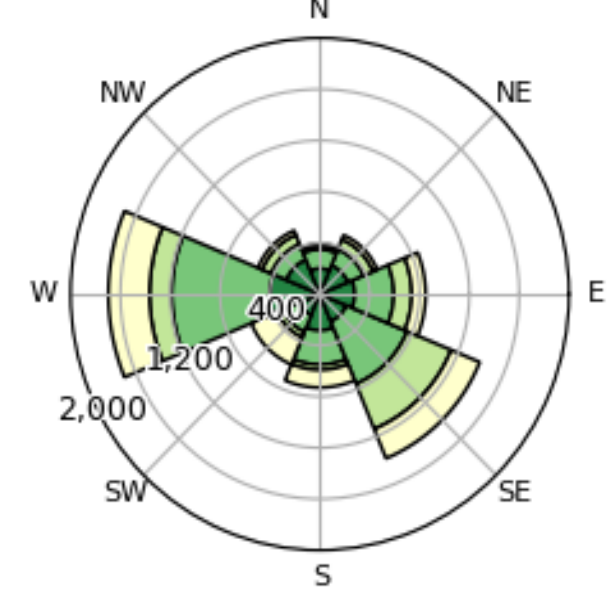


Source: US Census Bureau LODES 2023 (OnTheMap)

# Residential Location of the 6,684 People Working in Hillsborough



Job Counts by Distance/Direction in 2023  
All Workers

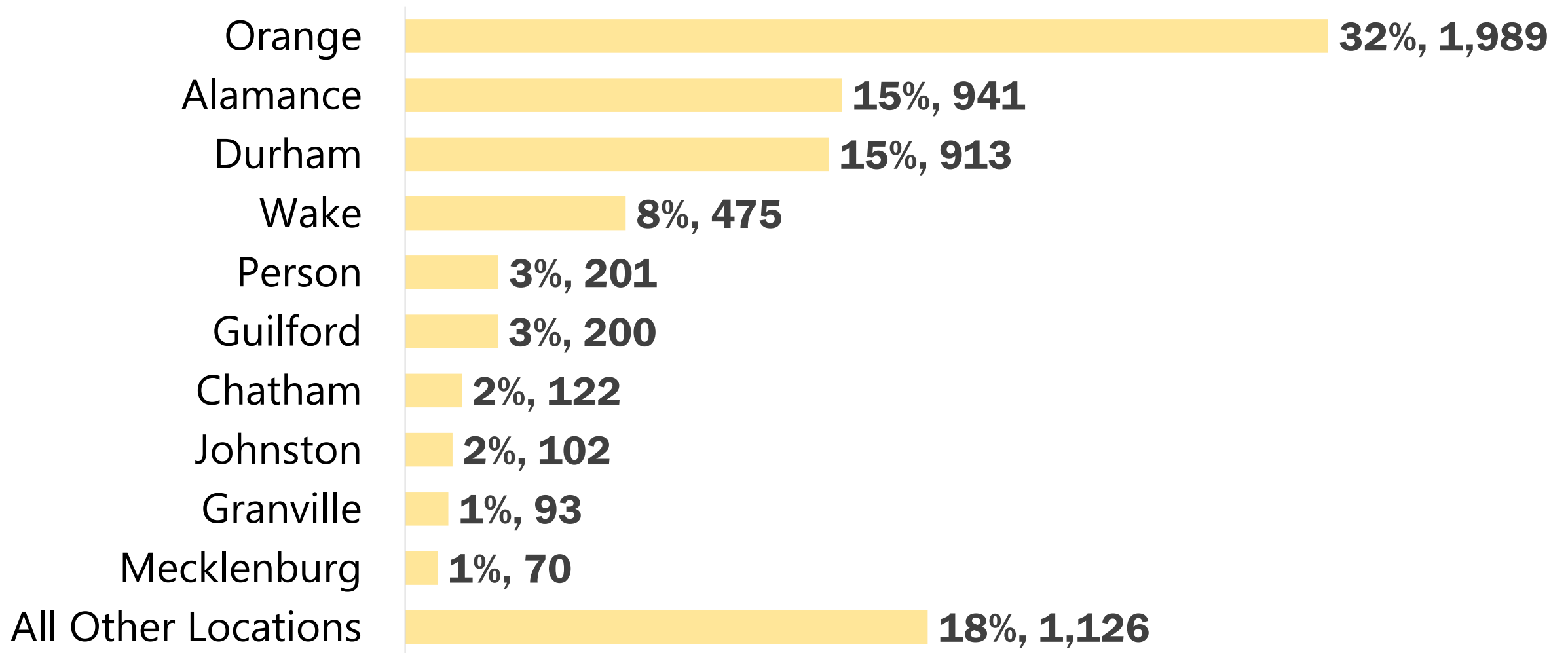


Jobs by Distance - Work Census Block to Home Census Block

	2023	
	Count	Share
Total Primary Jobs	6,684	100.0%
Less than 10 miles	2,113	31.6%
10 to 24 miles	2,450	36.7%
25 to 50 miles	979	14.6%
Greater than 50 miles	1,142	17.1%

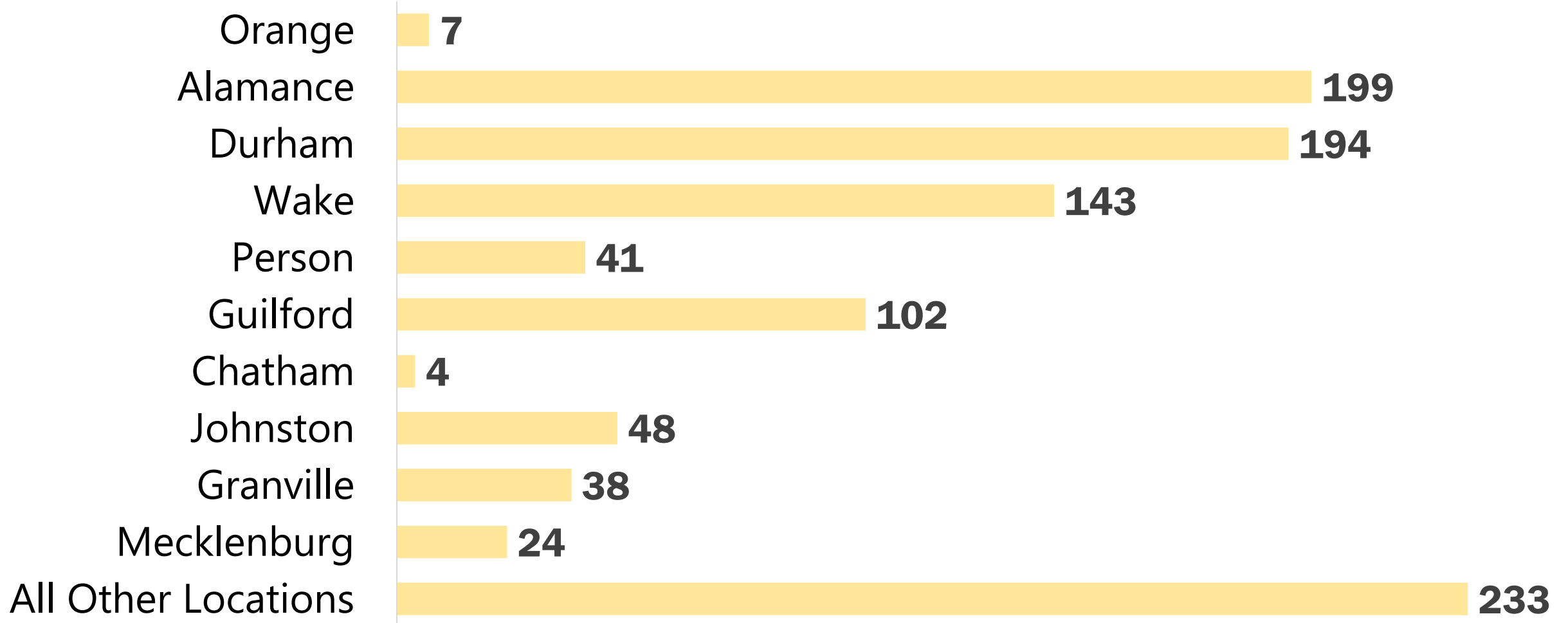
# Where Do Hillsborough's Workers Live?

Hillsborough's 6,684 workers by county of residence, 2023



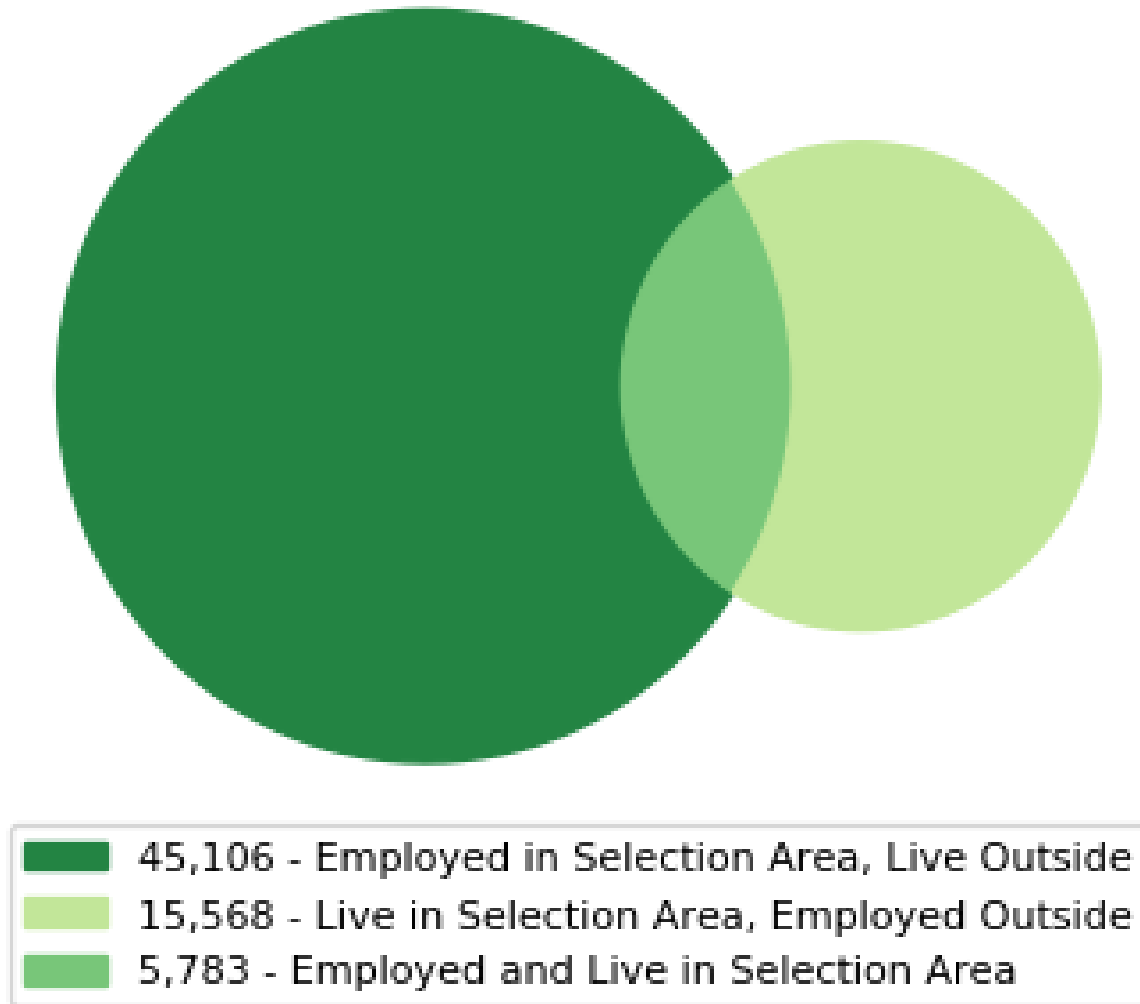
# Change in Number of Hillsborough Workers by County of Residence

From 2013-2023 (1,033 net new jobs)

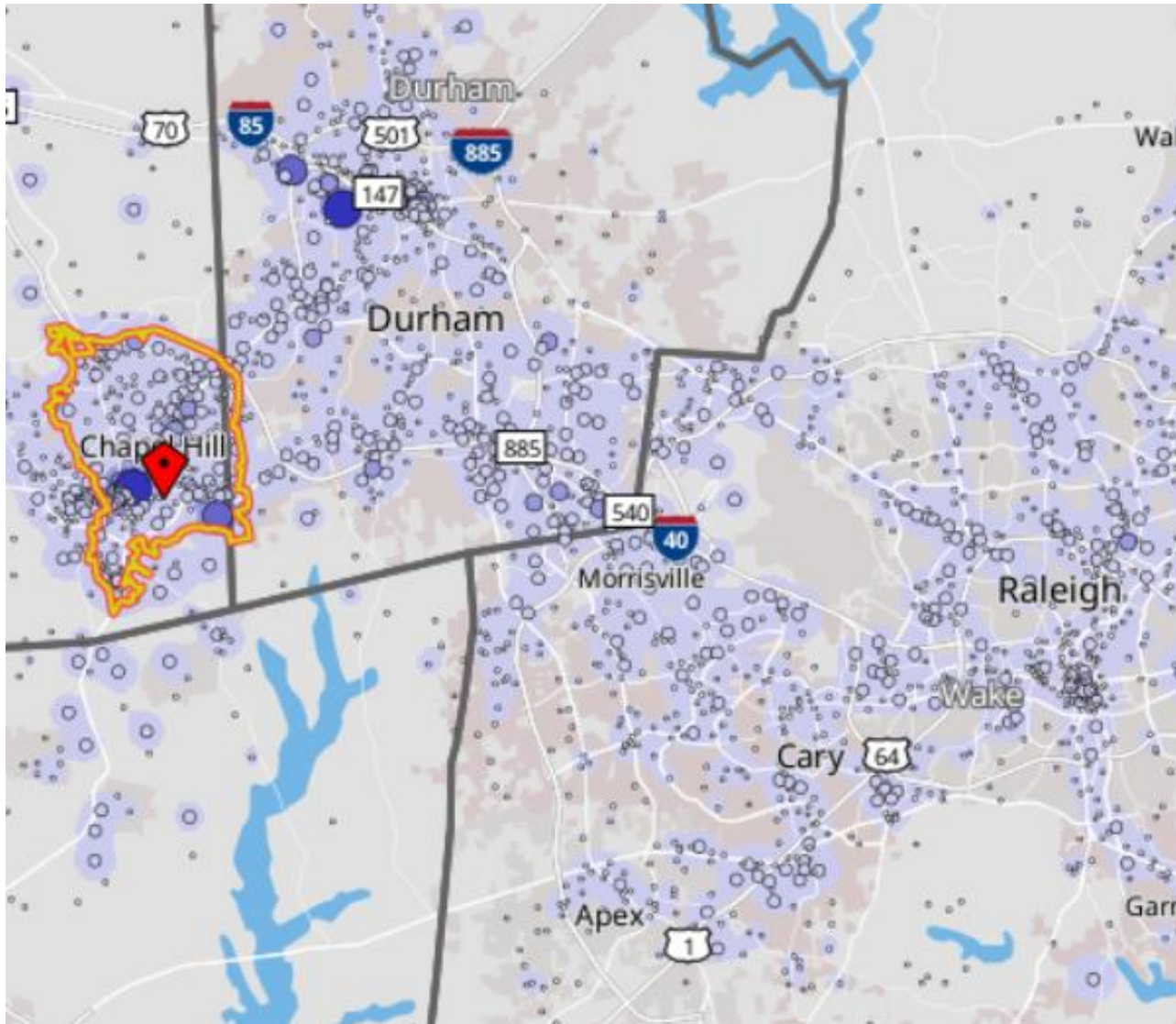


# Chapel Hill Worker Inflow/Outflow

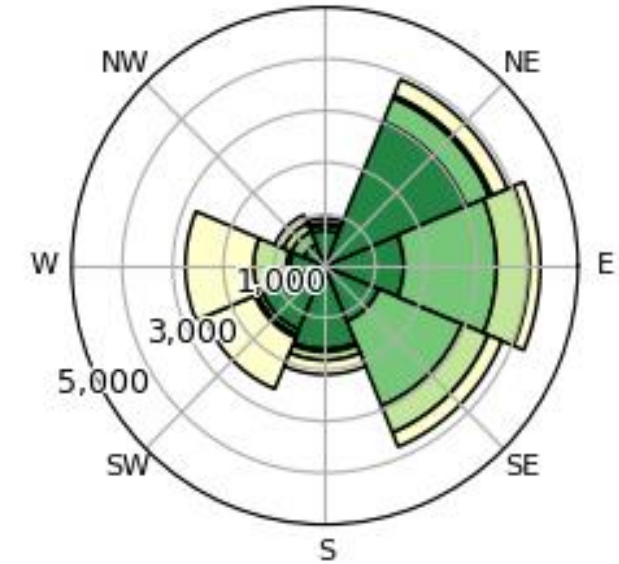
45,106 drive in, 15,568 drive out, and 5,783 live and work in Chapel Hill



# Employment Location for Chapel Hill's 21,351 Working Residents



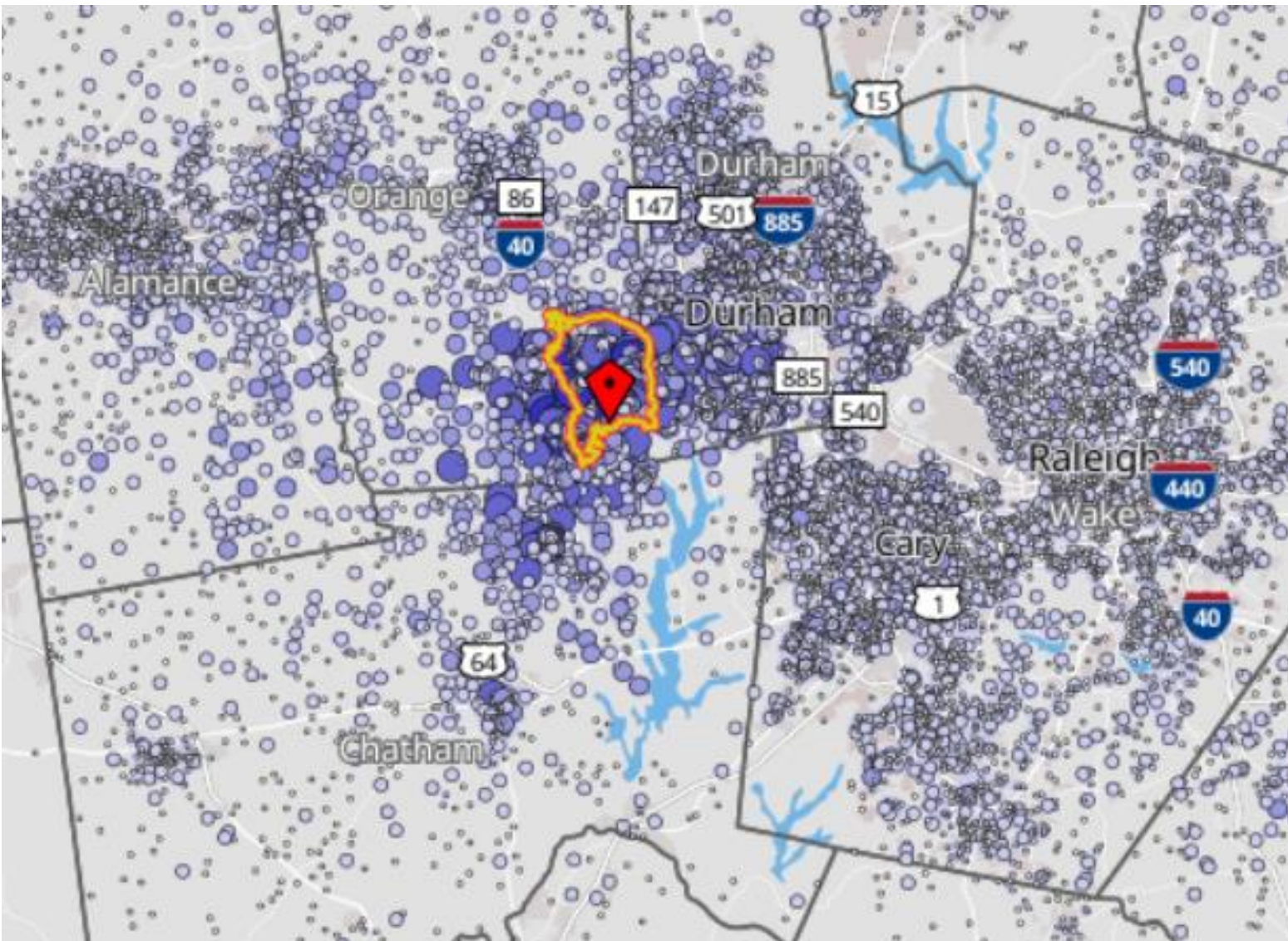
Job Counts by Distance/Direction in 2023  
All Workers  
N



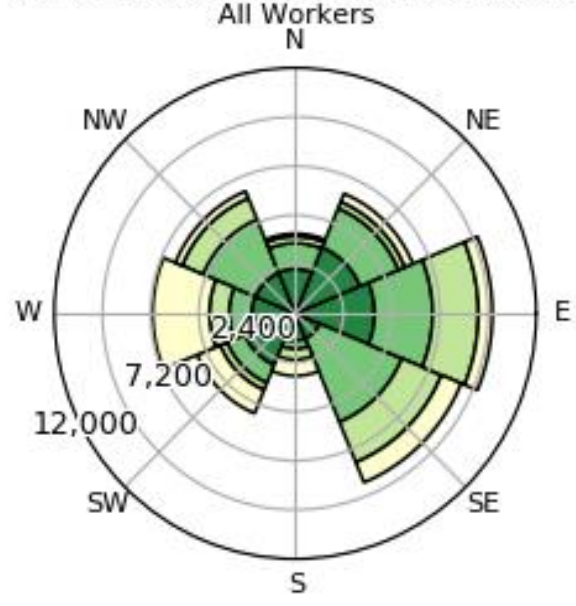
**Jobs by Distance - Home Census Block to Work Census Block**

	2023	
	Count	Share
Total Primary Jobs	21,351	100.0%
Less than 10 miles	10,496	49.2%
10 to 24 miles	4,697	22.0%
25 to 50 miles	2,364	11.1%
Greater than 50 miles	3,794	17.8%

# Residential Location of the 50,889 People Working in Chapel Hill



Job Counts by Distance/Direction in 2023



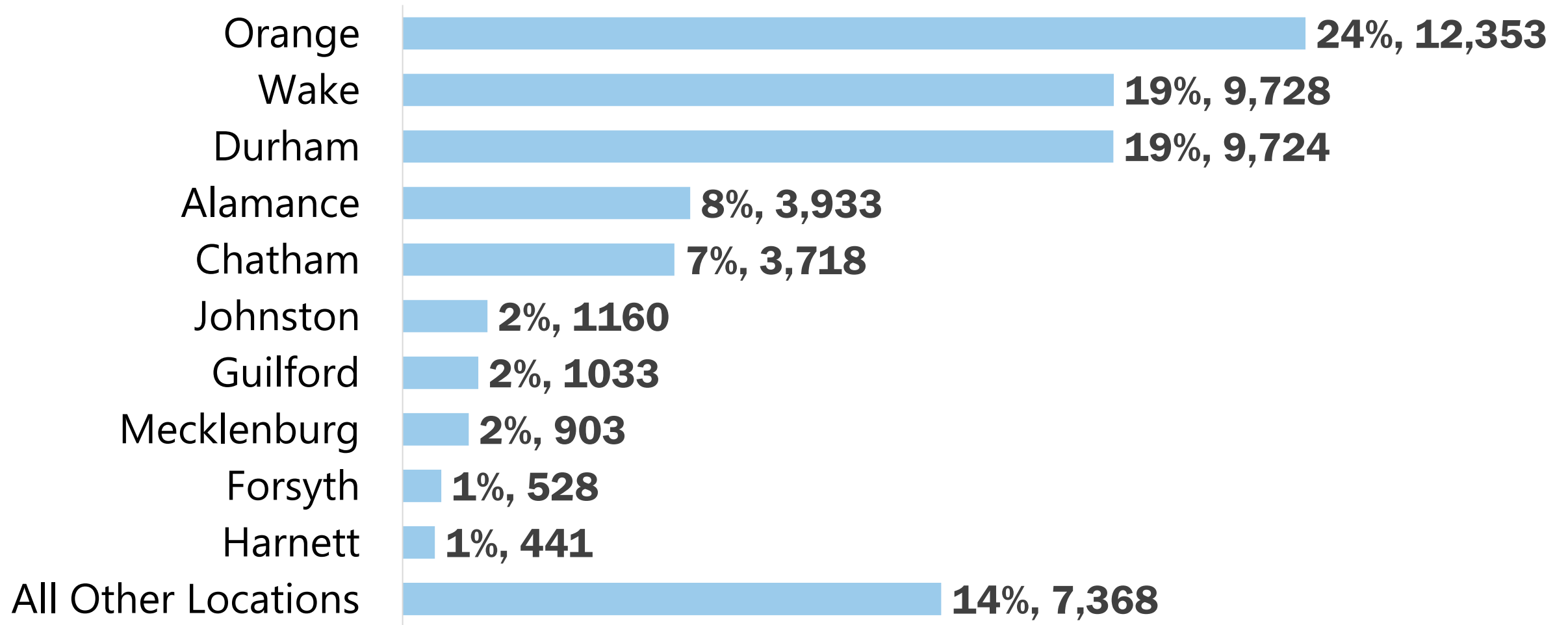
**Jobs by Distance - Work Census Block to Home Census Block**

	2023	
	Count	Share
Total Primary Jobs	50,889	100.0%
Less than 10 miles	19,321	38.0%
10 to 24 miles	15,956	31.4%
25 to 50 miles	8,106	15.9%
Greater than 50 miles	7,506	14.7%

Source: US Census Bureau LODES 2023 (OnTheMap)

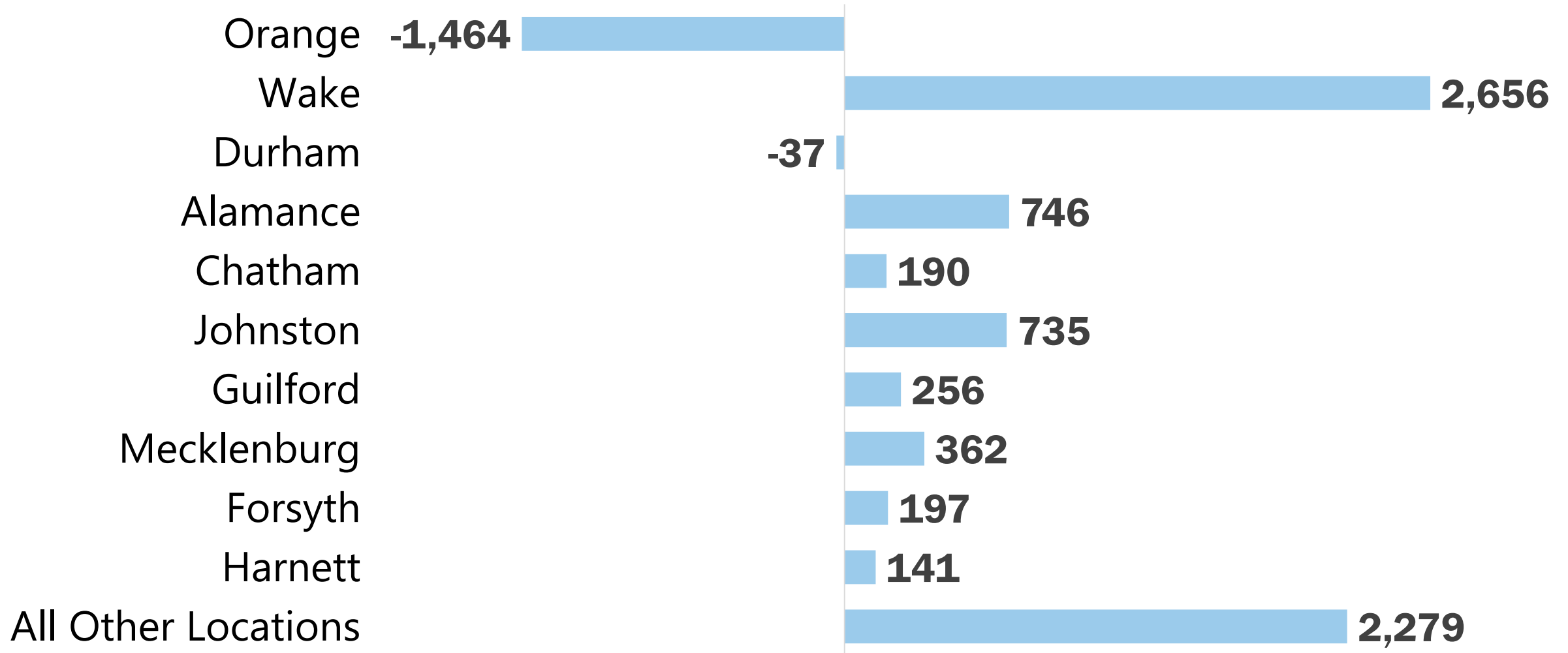
# Where Do Chapel Hill's Workers Live?

Chapel Hill's 50,889 workers by county of residence



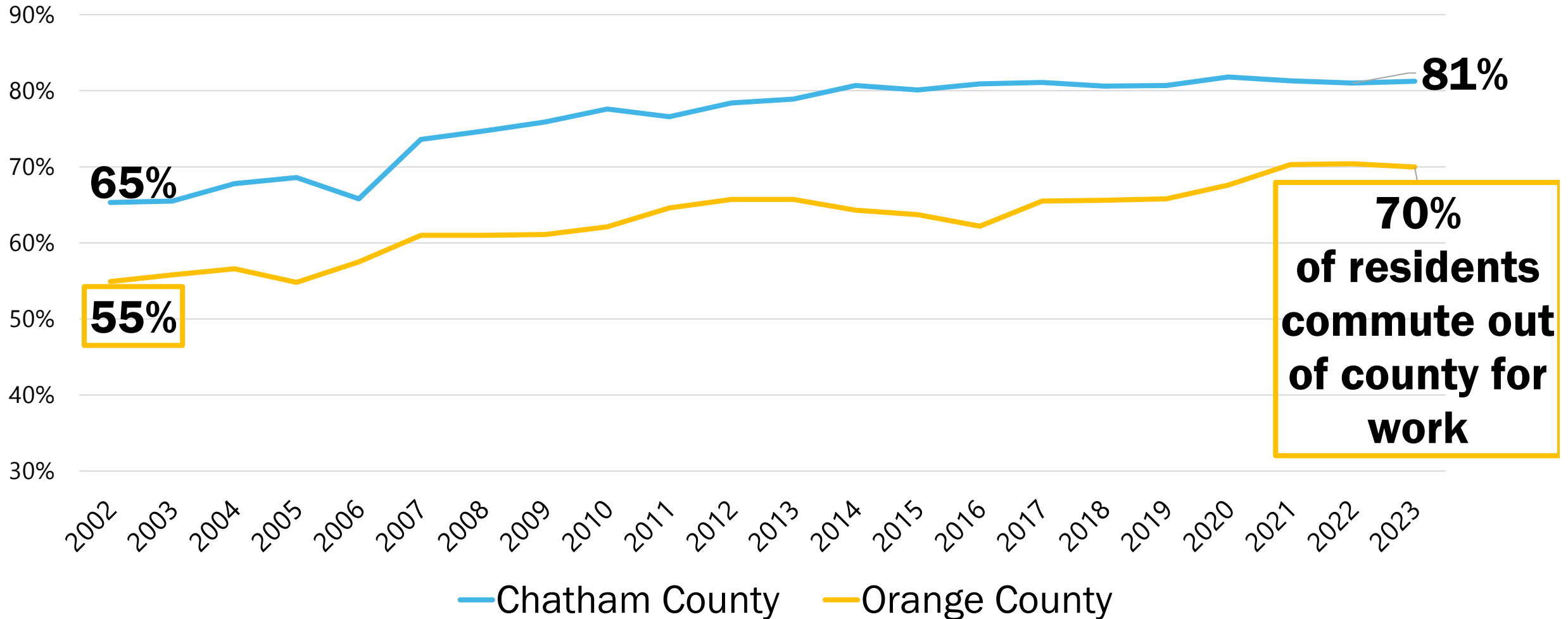
# Change in Chapel Hill Workers by County of Residence

From 2013-2023 (6,061 total net new jobs)



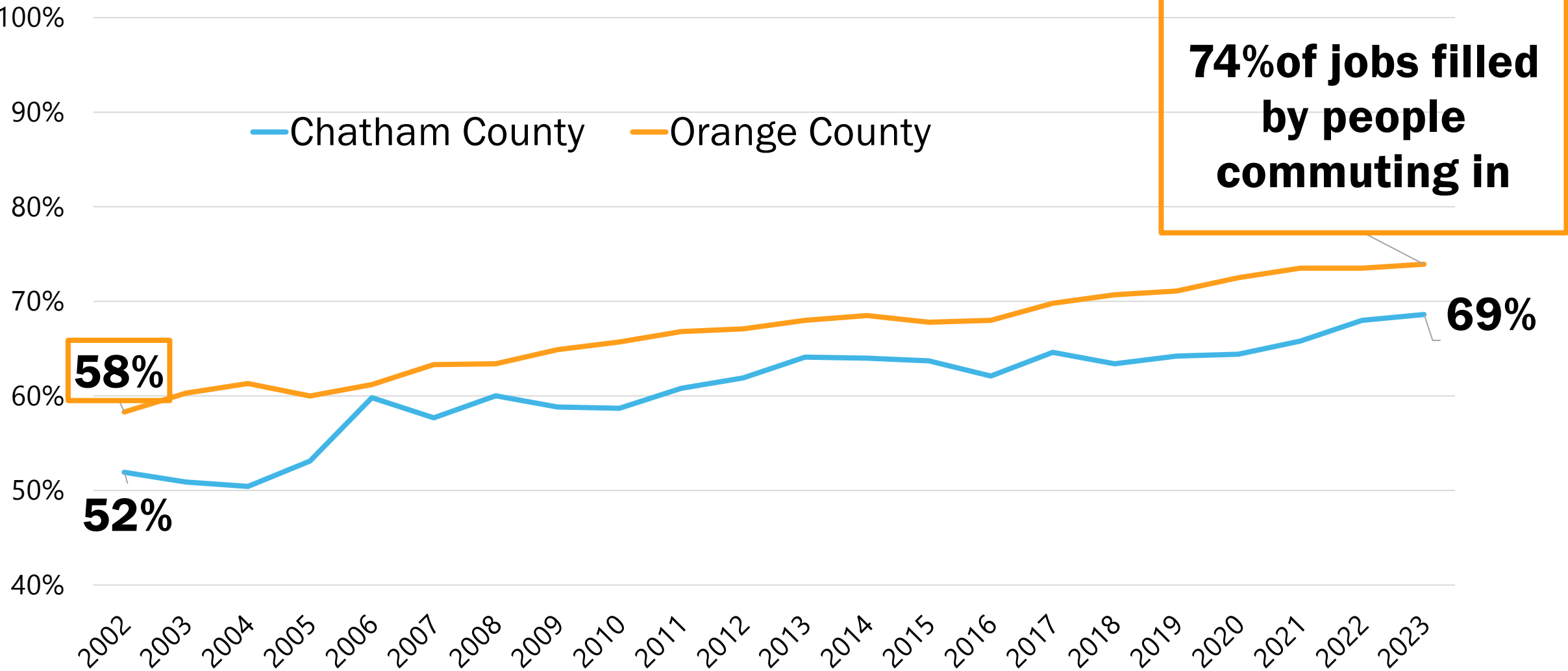
# County Residents Out-Commuting

Percent of county residents that commute out of the county for work, 2002 to 2023



# Jobs Filled by Workers Commuting In

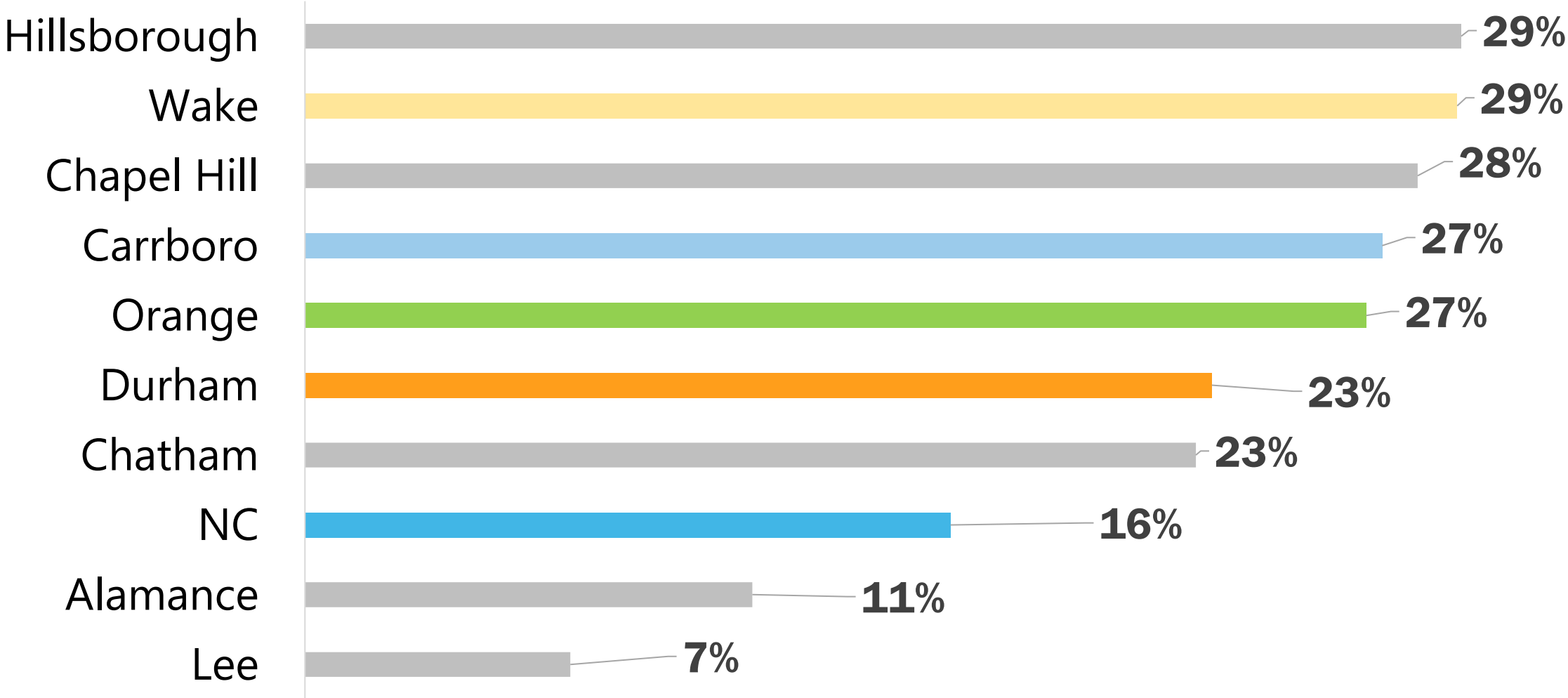
Percent of jobs filled by workers commuting into the county, 2002 to 2023



Source: US Census Bureau LODES 2023 (OnTheMap)

# Percent of Workers Who Worked from Home

Percent of working residents who answered “worked from home” when asked how they got to work the previous week

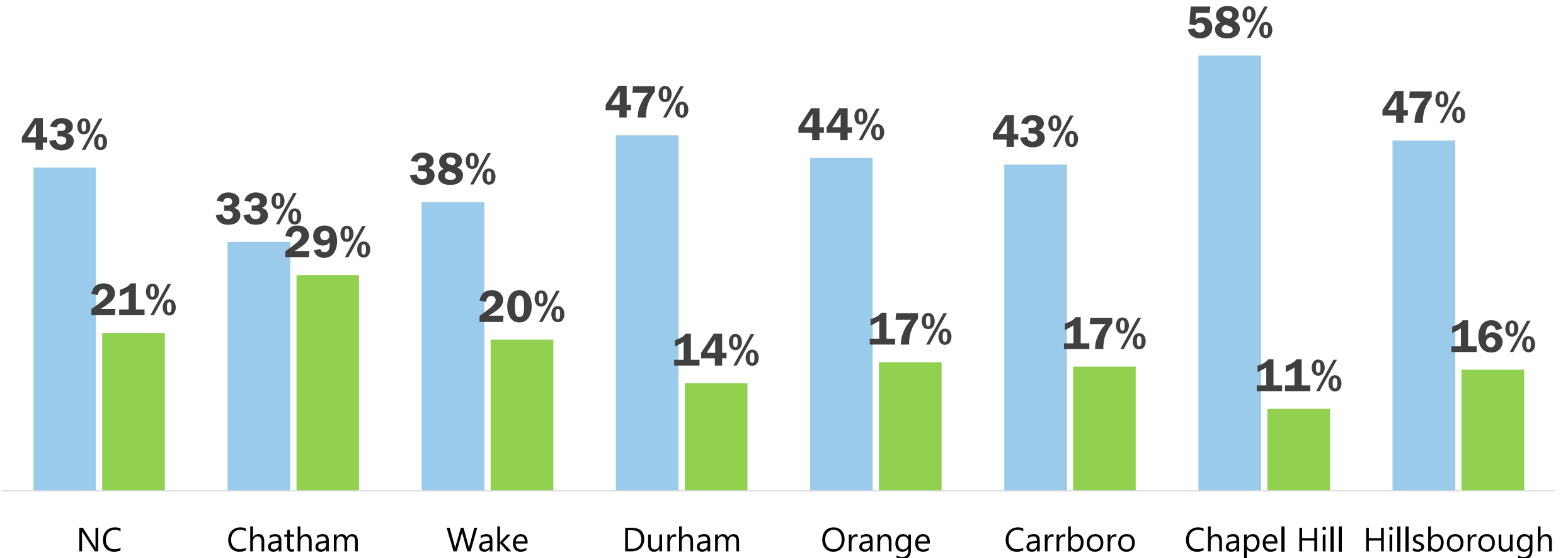


Source: American Community Survey (2020-2024 5-Year Estimates)

# Commute Length

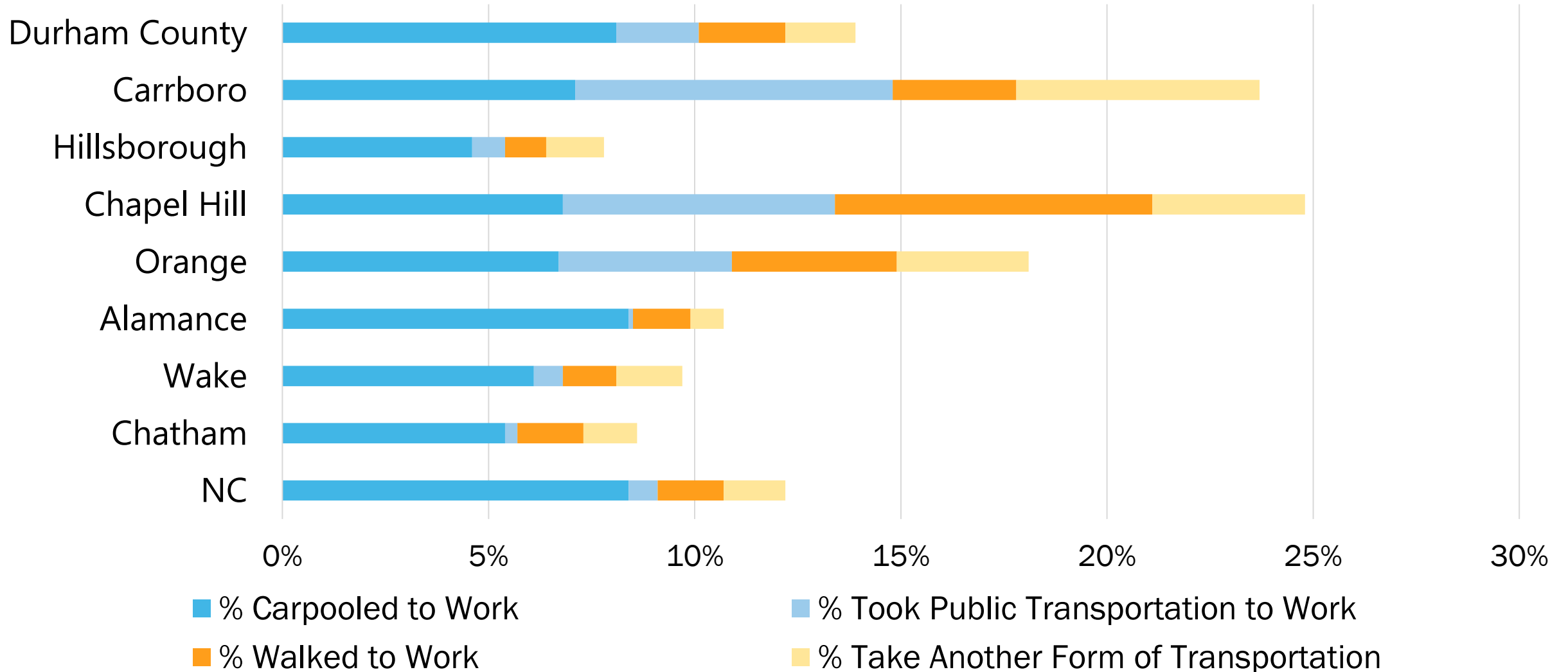
Percent of workers aged 16 and over by commute time

■ Less than 20 Minutes    ■ Greater than 35 Minutes



Source: American Community Survey (2020-2024 5-Year Estimates)

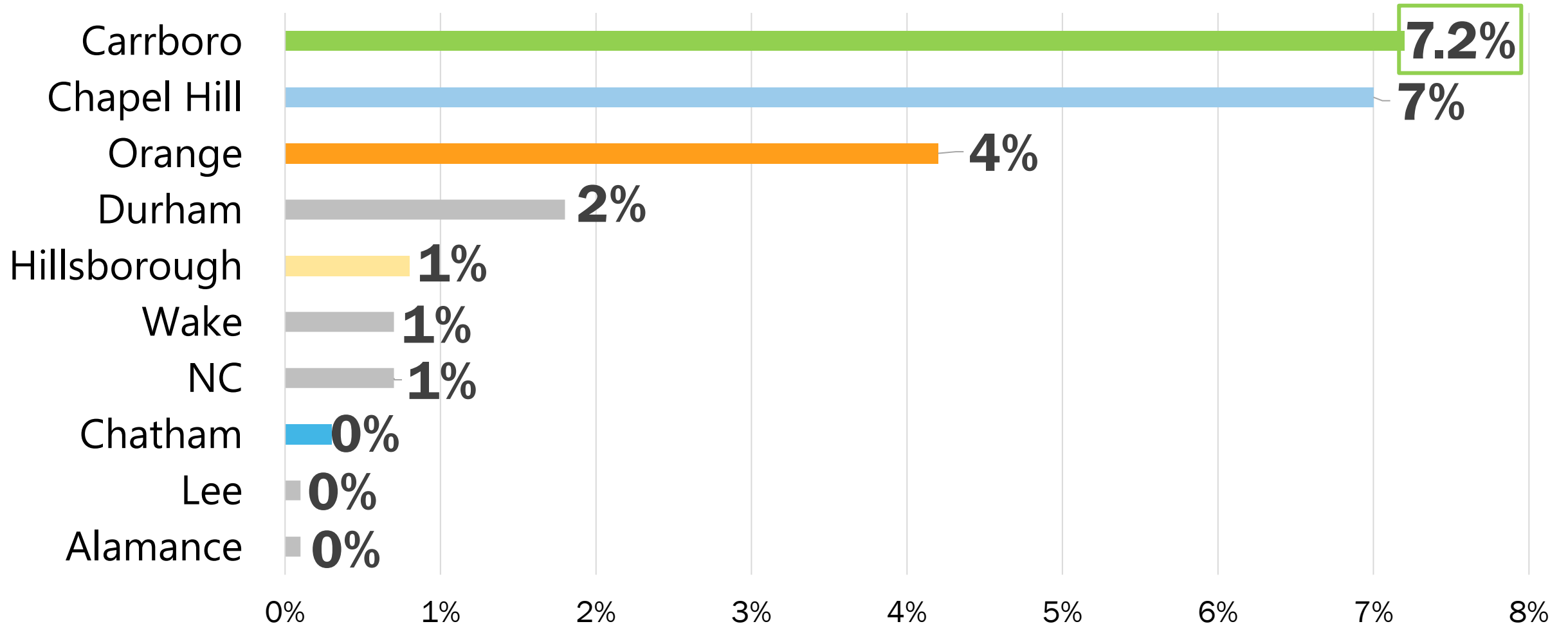
# How Workers Get to Work Other Than Driving Alone



Source: American Community Survey (2020-2024 5-Year Estimates)

# Percent of Workers Taking Public Transportation

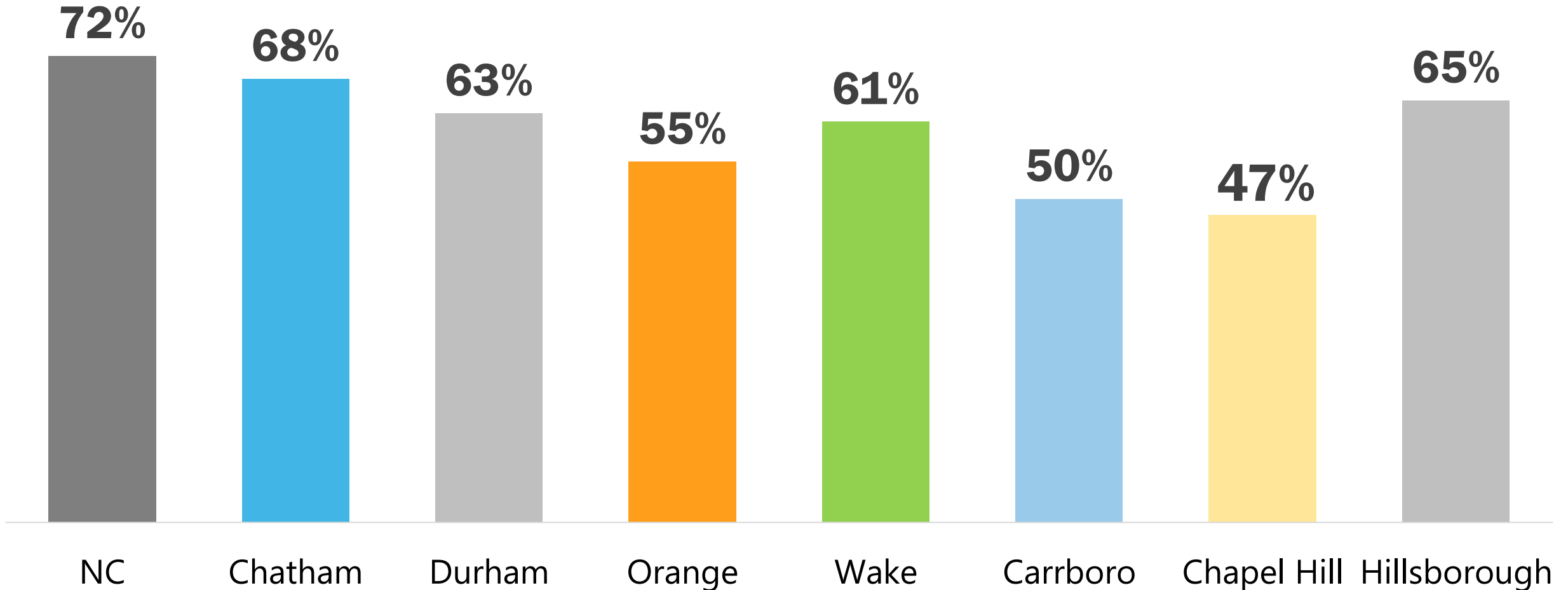
Percent of working residents who report taking public transportation to work



Source: American Community Survey (2020-2024 5-Year Estimates)

# Percent of Commuters Driving to Work Alone

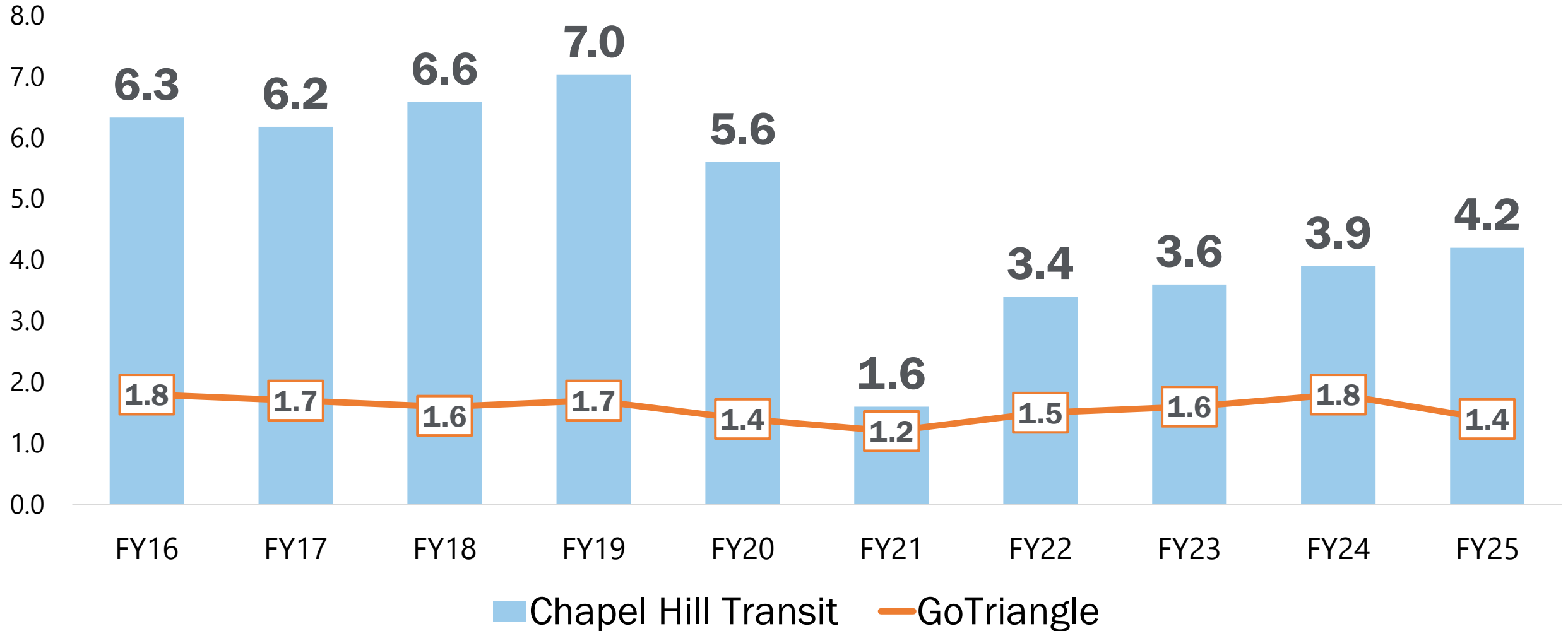
Percent of workers aged 16 and over driving to work alone



Source: American Community Survey (2020-2024 5-Year Estimates)

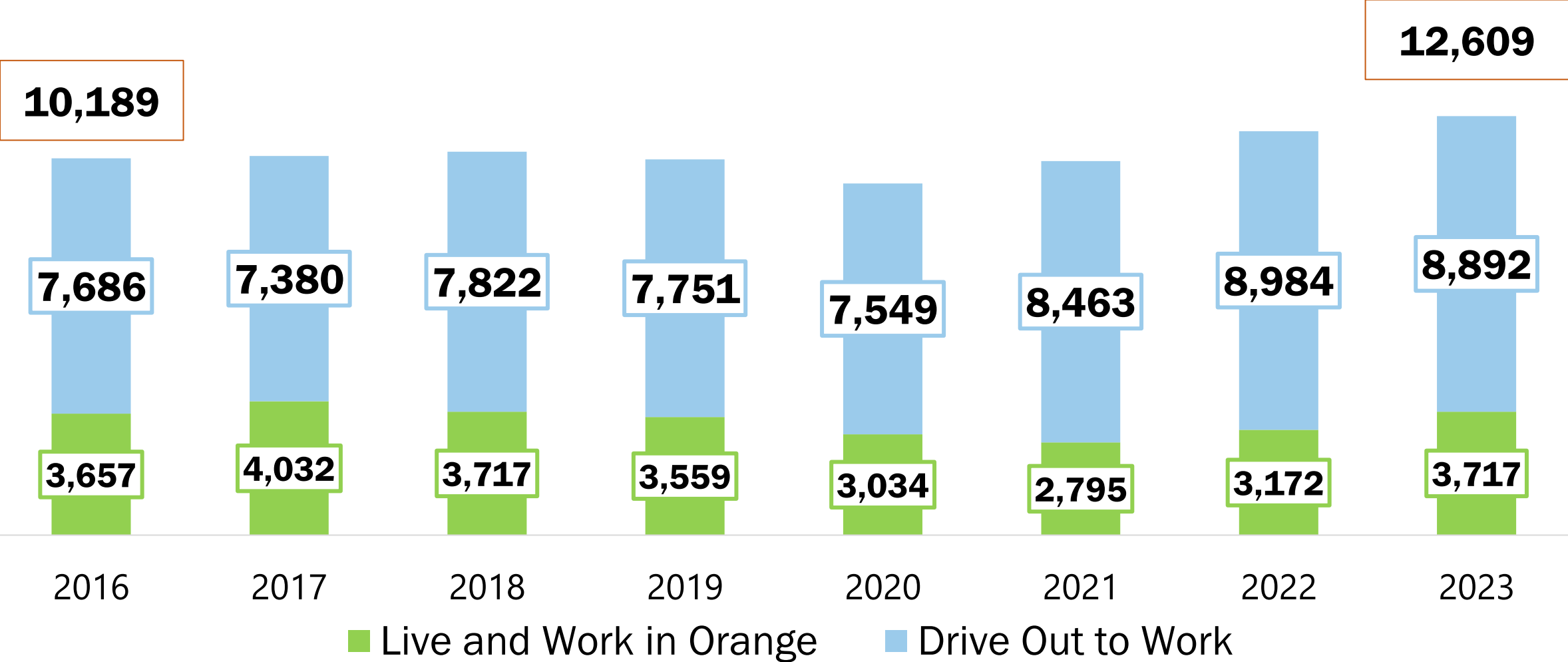
# Chapel Hill Transit & GoTriangle Ridership

Annual Chapel Hill Transit/GoTriangle ridership from FY2016 – FY2025 (in millions)



Source: Chapel Hill Transit; GoTriangle

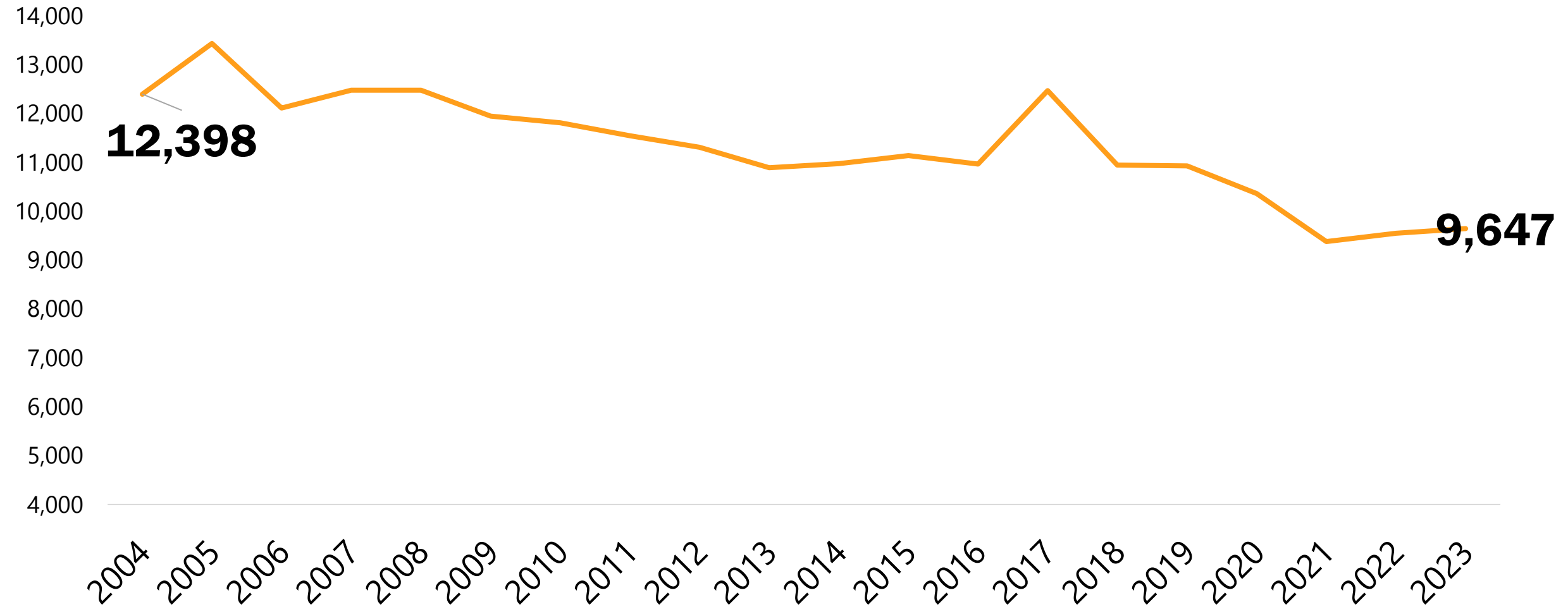
# Young Workers Living in Orange County



Source: US Census Bureau LODES 2023 (OnTheMap)

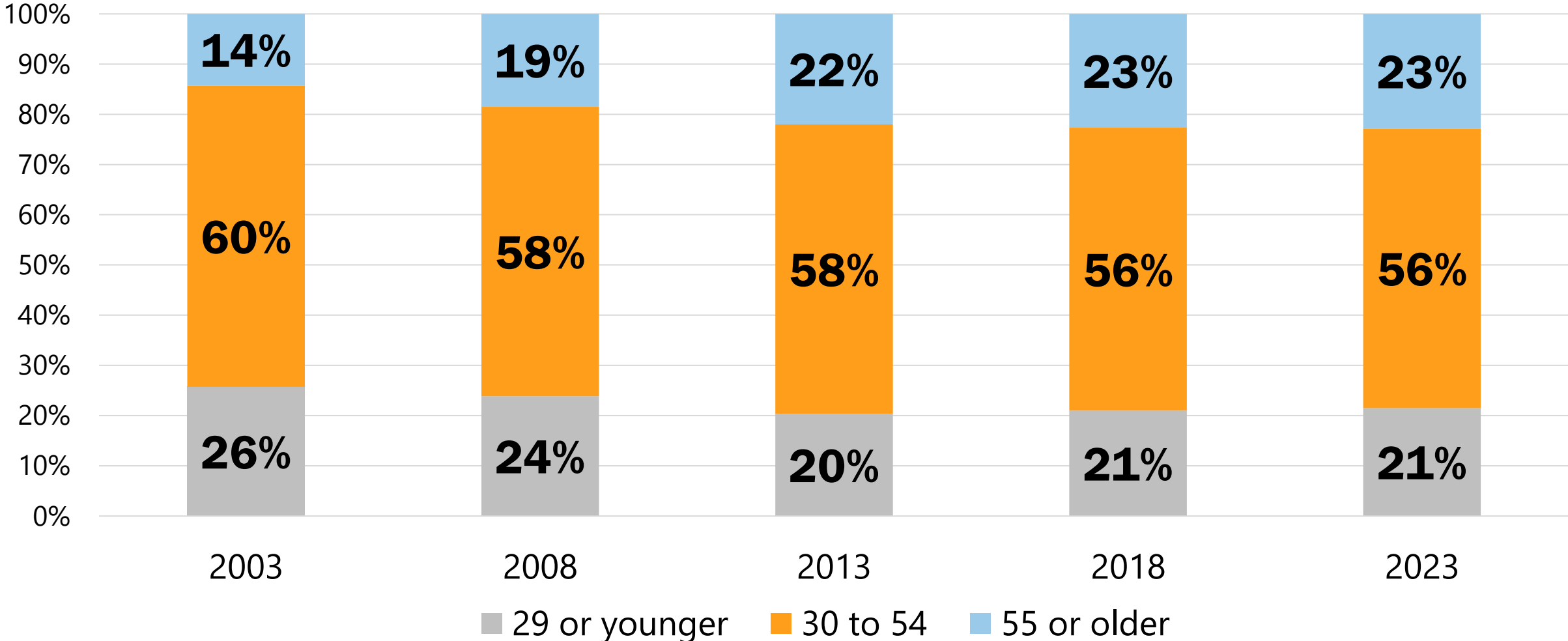
# Number of 30-54 Year-Old Workers Living and Working in Orange

Workers aged 30-54; change from 2004 to 2023



# Age of Workers Working in Orange County

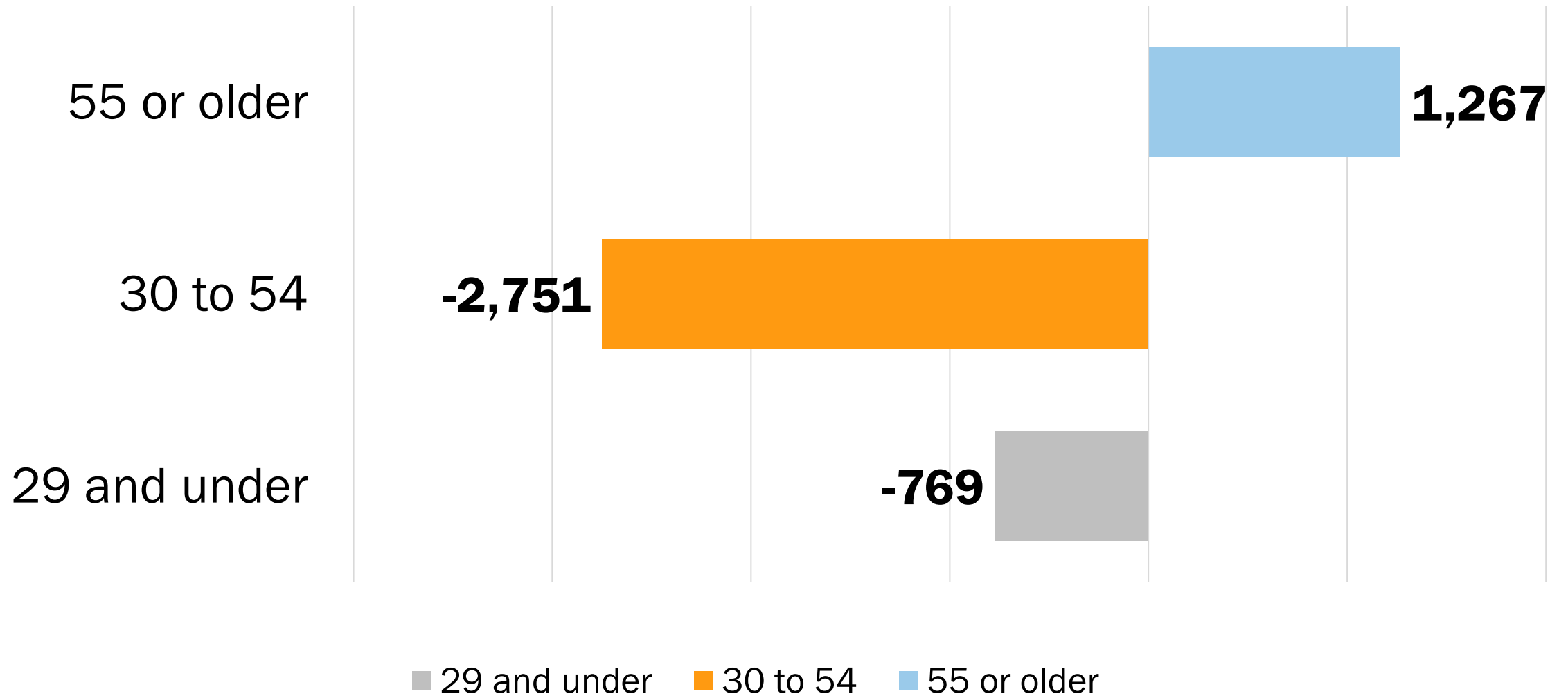
Age groups 29 or younger, 30 to 54, 55 or older



Source: US Census Bureau LODES 2023 (OnTheMap)

# Change in Workers in Orange County, 2004 to 2023

Change in number of workers living and working in Orange County by age



# Small Business Sponsor

presented by



**Mark Moshier**

Principal, Legacy Real Property Group



**Tom Wiltberger**

Principal, Broker, Realtor,  
Terra Nova | COMPASS

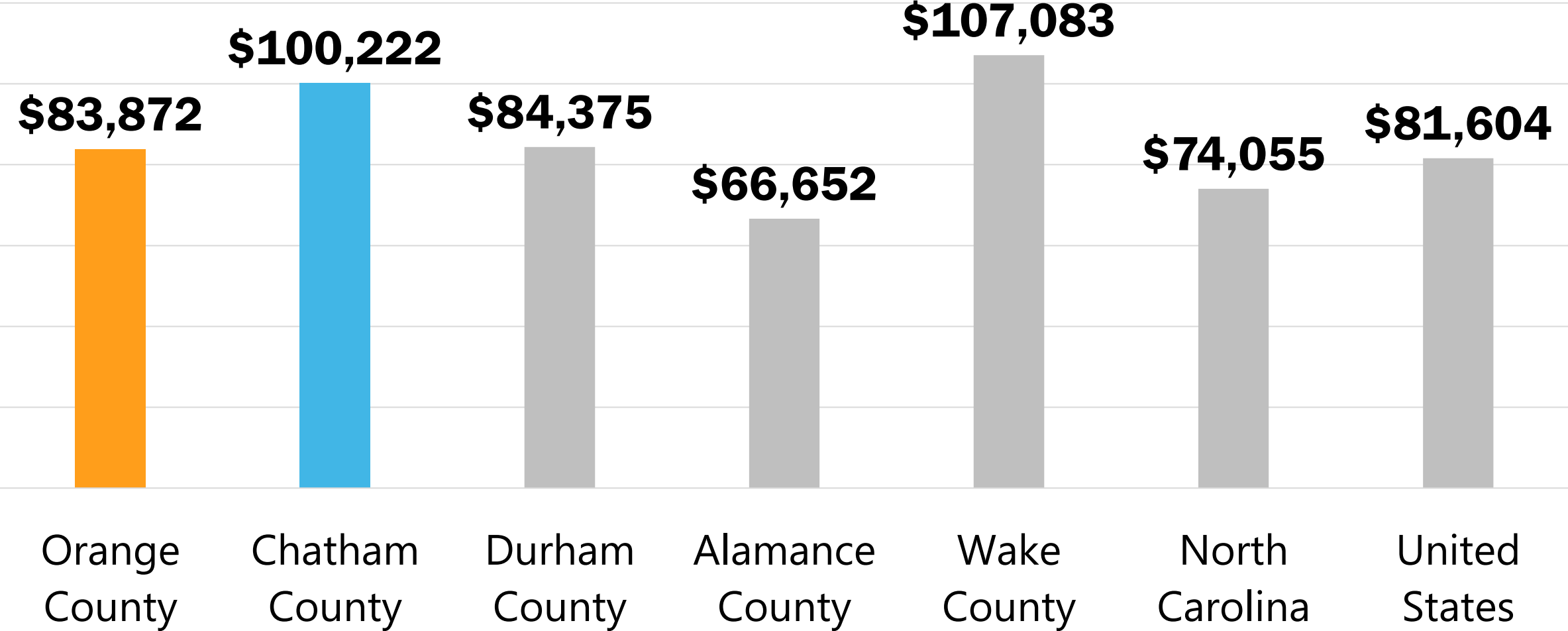
SOUTH  
GREEN

FLATS



# **Economy: Income**

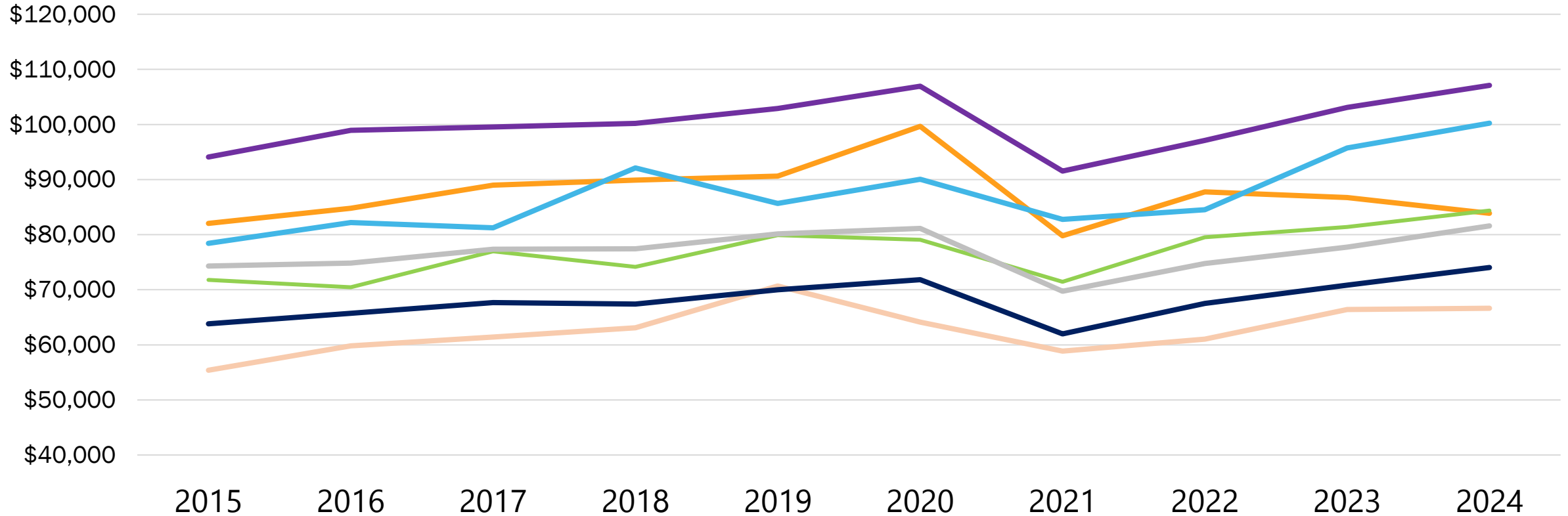
# 2024 Median Household Income



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

# Median Household Income, 2015-2024

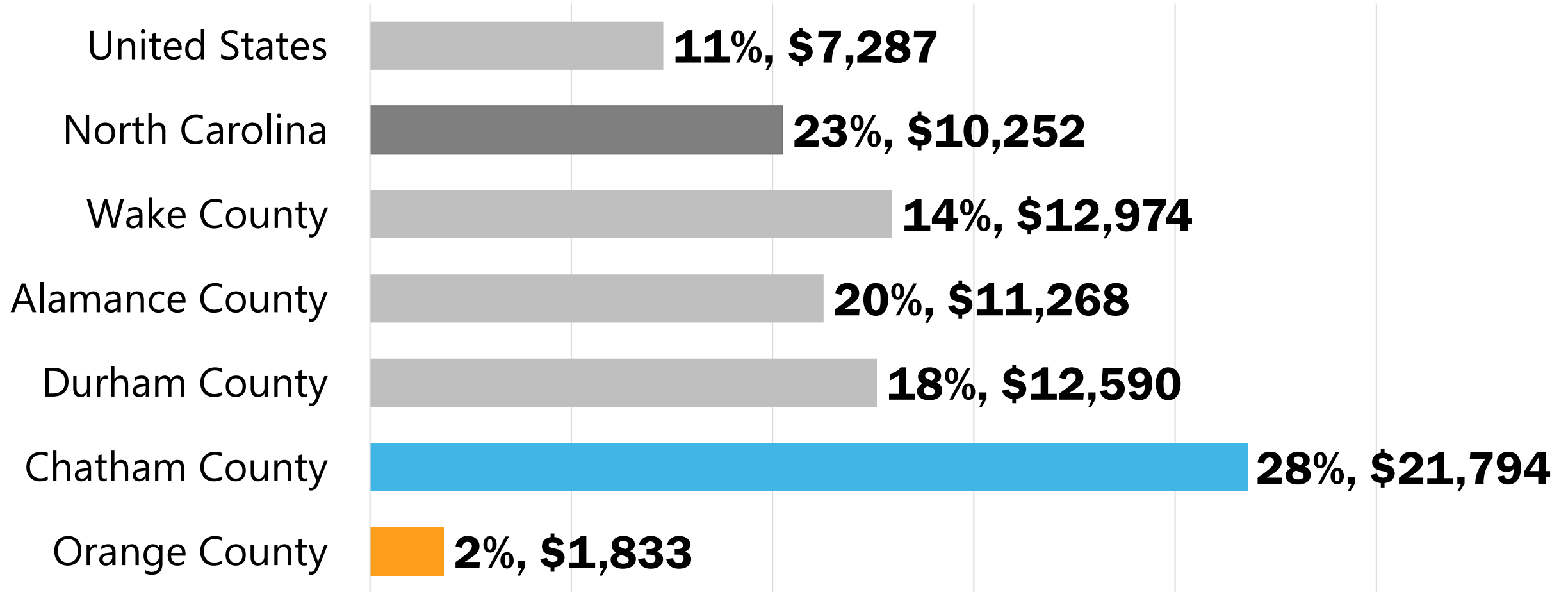
Inflation adjusted \$2024



— Orange County — Chatham County — Durham County — Alamance County  
— Wake County — North Carolina — United States

# Growth in Median Household Income from 2015-2024

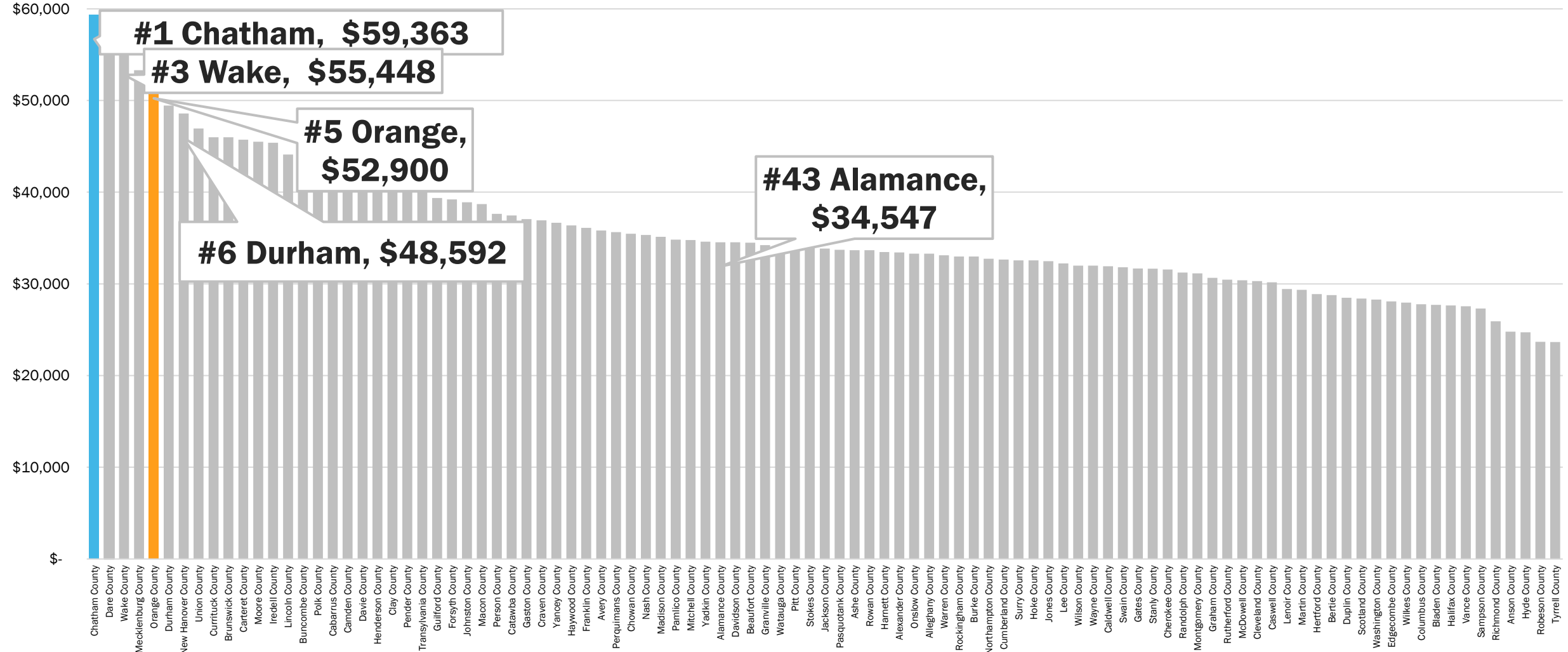
Inflation adjusted \$2024



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

# Per Capita Income | Orange = \$52,900 (5<sup>th</sup> in NC)

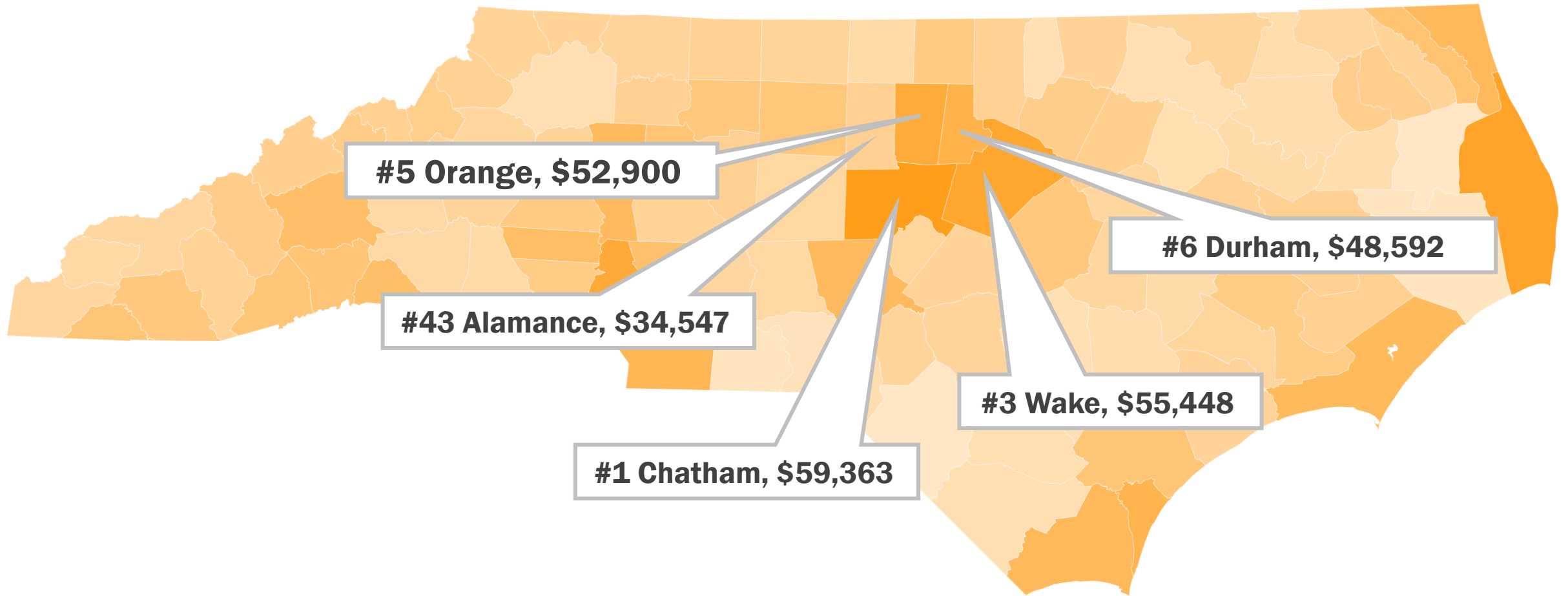
Per capita income is the total income earned in an area divided by the total number of residents in that area



Source: American Community Survey (2020-2024 5-Year Estimates)

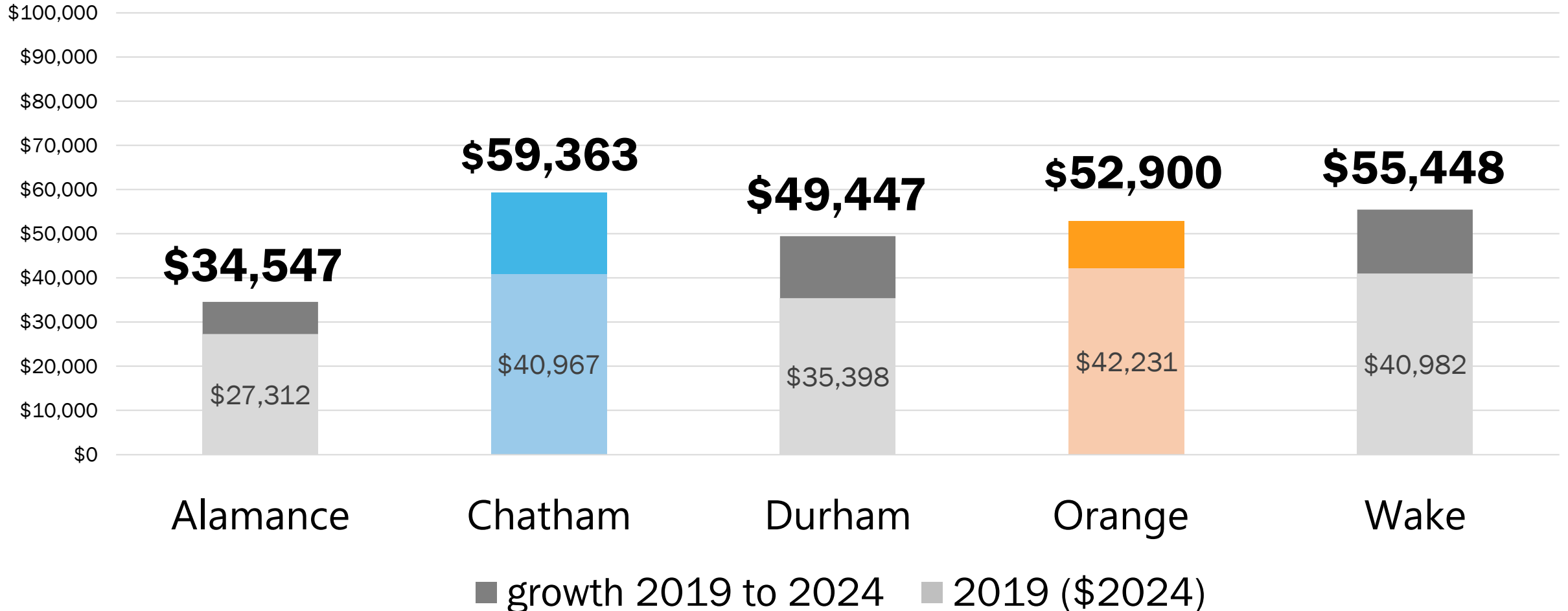
# Per Capita Income | Orange = \$52,900 (5<sup>th</sup> in NC)

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



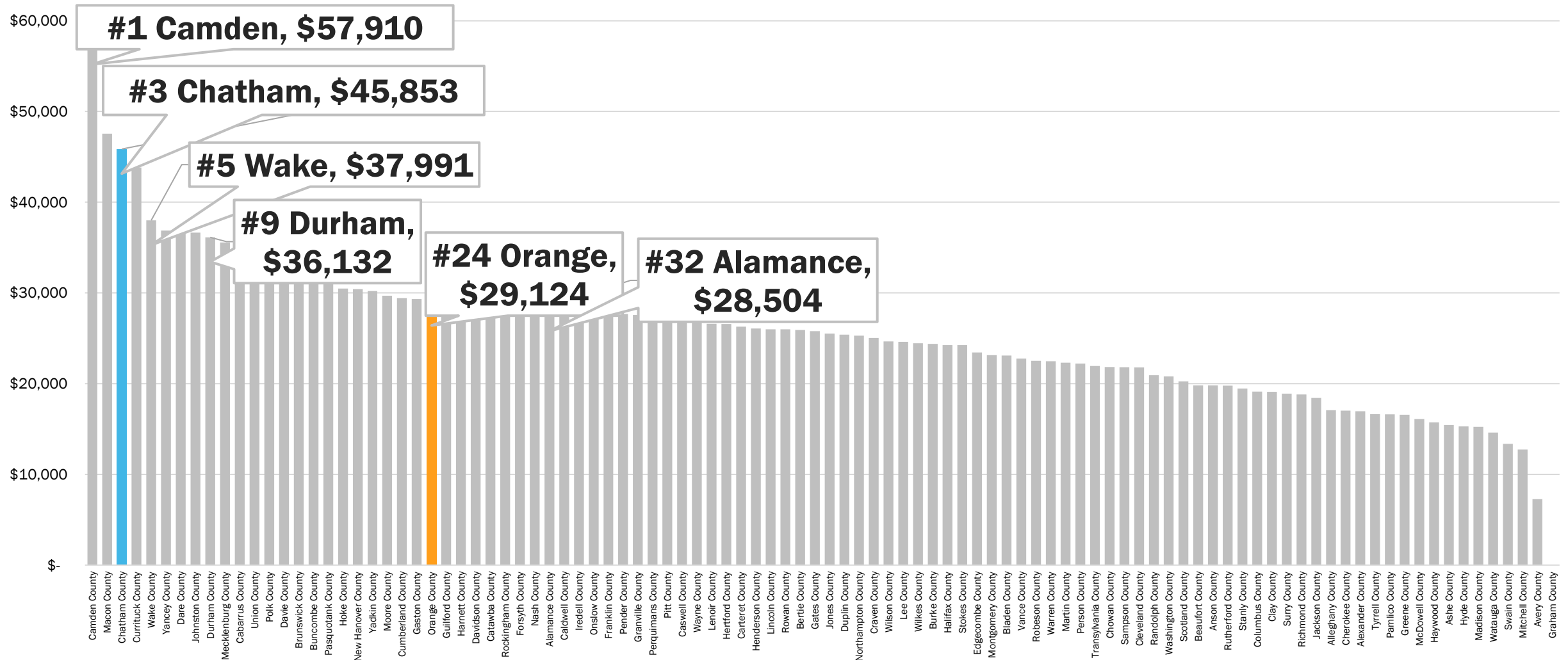
# County Per Capita Income 2024, with Change from 2019

Per capita income is the total income earned in an area divided by the total number of residents in that area (inflation adjusted \$2024)



# Black Per Capita Income | Orange = \$29,124 (24<sup>th</sup> in NC)

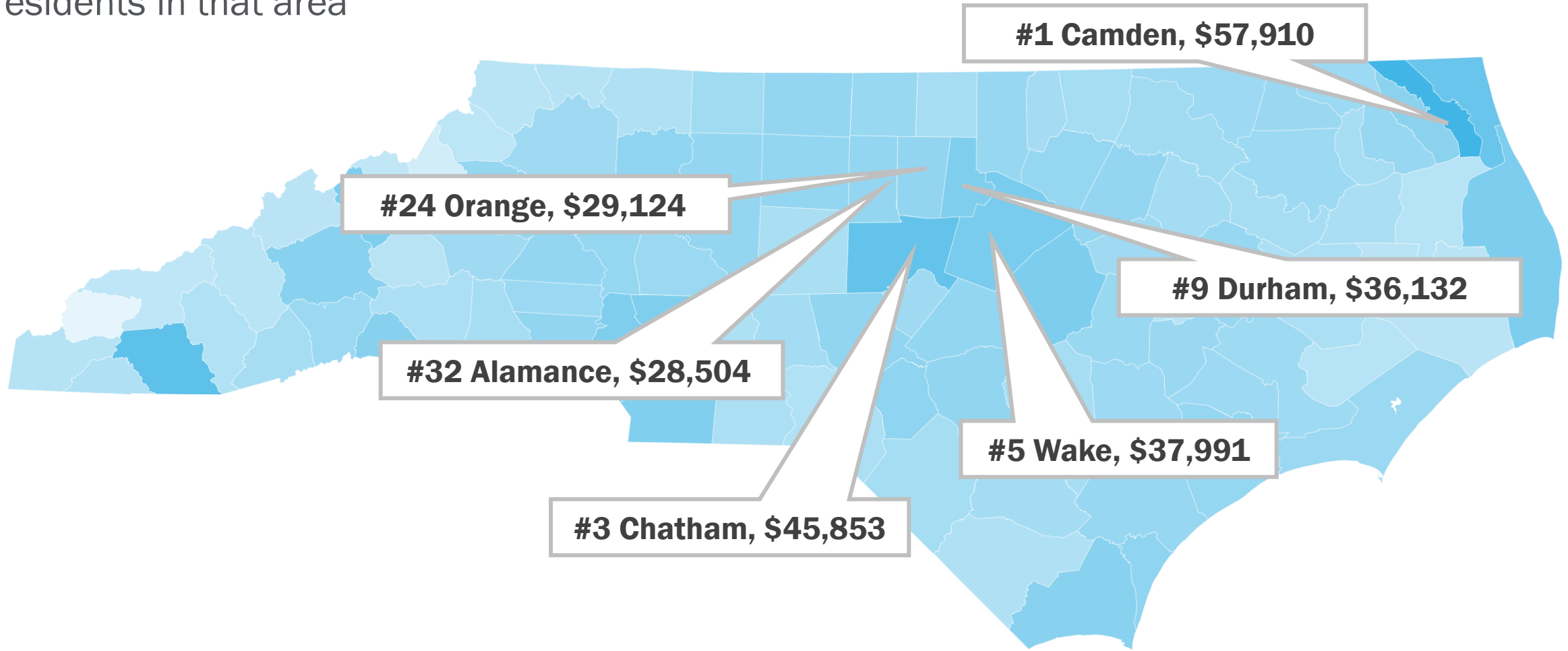
Black per capita income is the total income earned by Black residents in an area divided by the total number of Black residents in that area



Source: American Community Survey (2020-2024 5-Year Estimates)

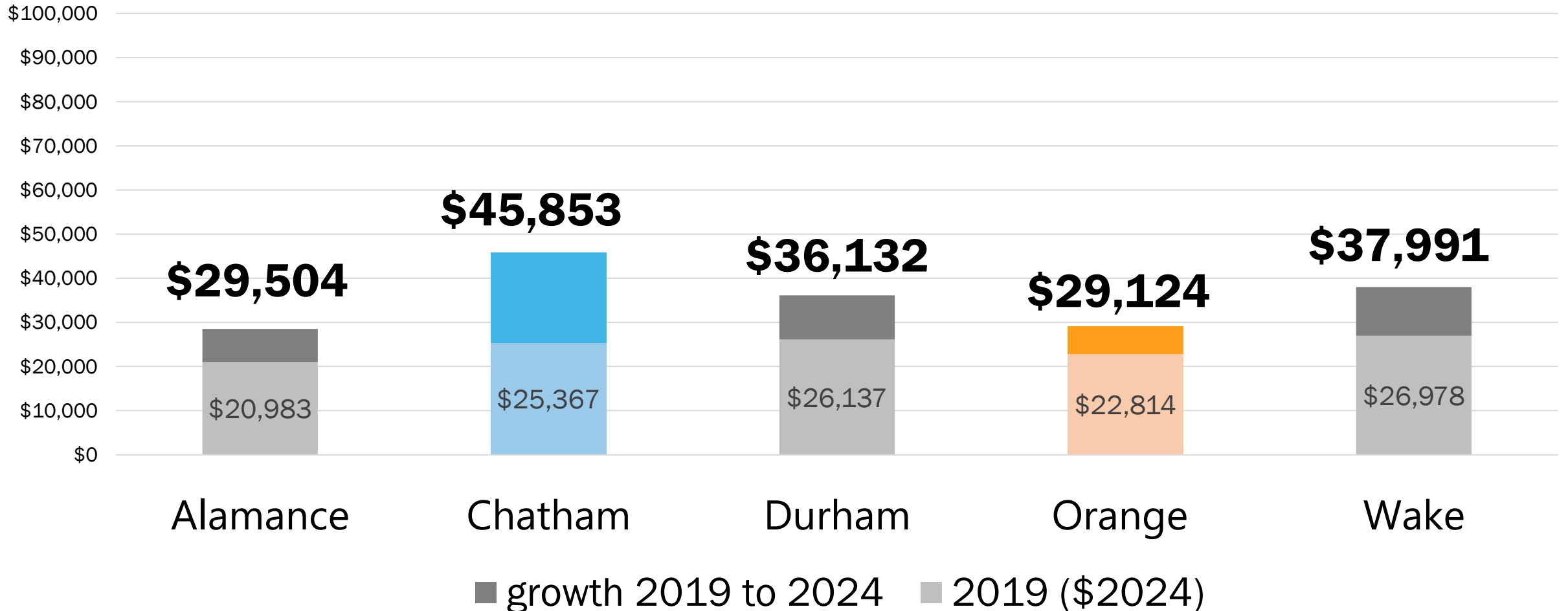
# Black Per Capita Income | Orange = \$29,124 (24<sup>th</sup> in NC)

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



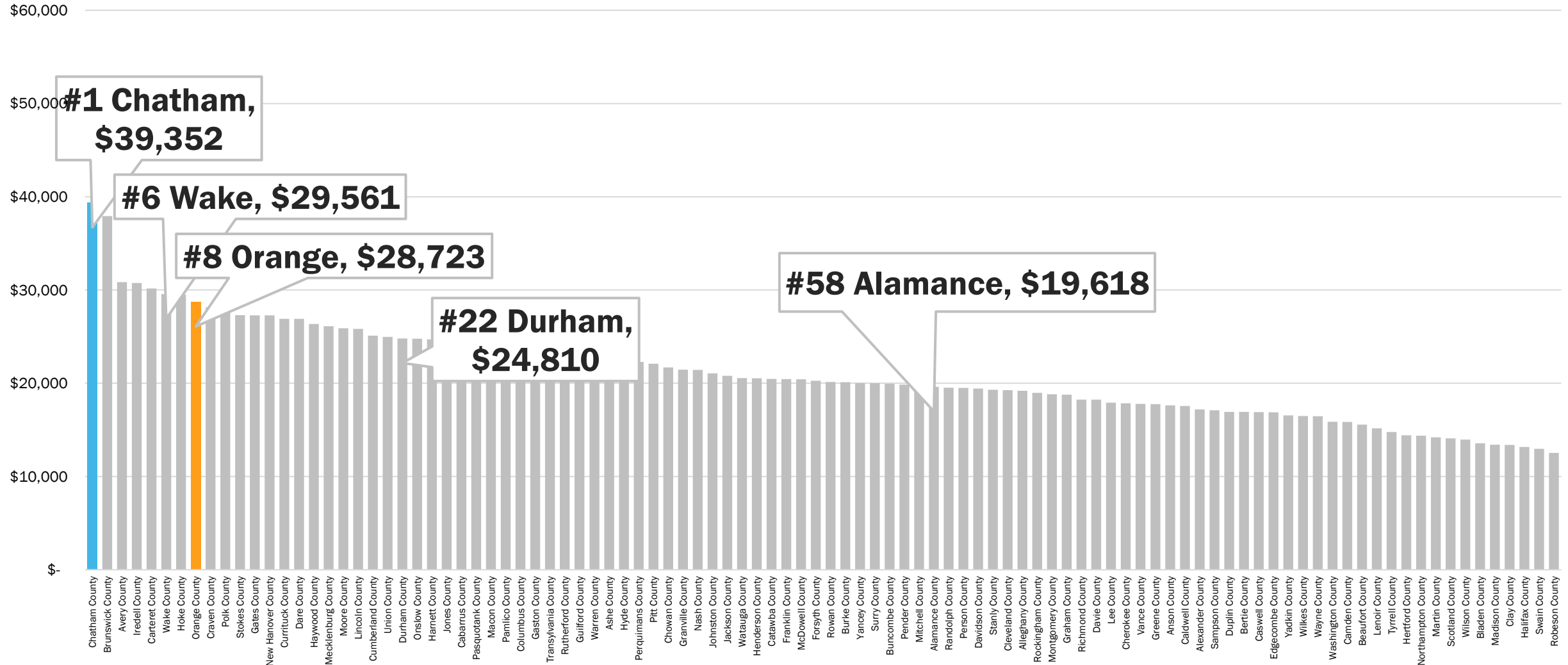
# County Black Per Capita Income 2024, with Change from 2019

Black per capita income is the total income earned in an area divided by the total number of Black residents in that area (inflation adjusted \$2024)



# Hispanic Per Capita Income | Orange = \$28,723 (8<sup>th</sup> in NC)

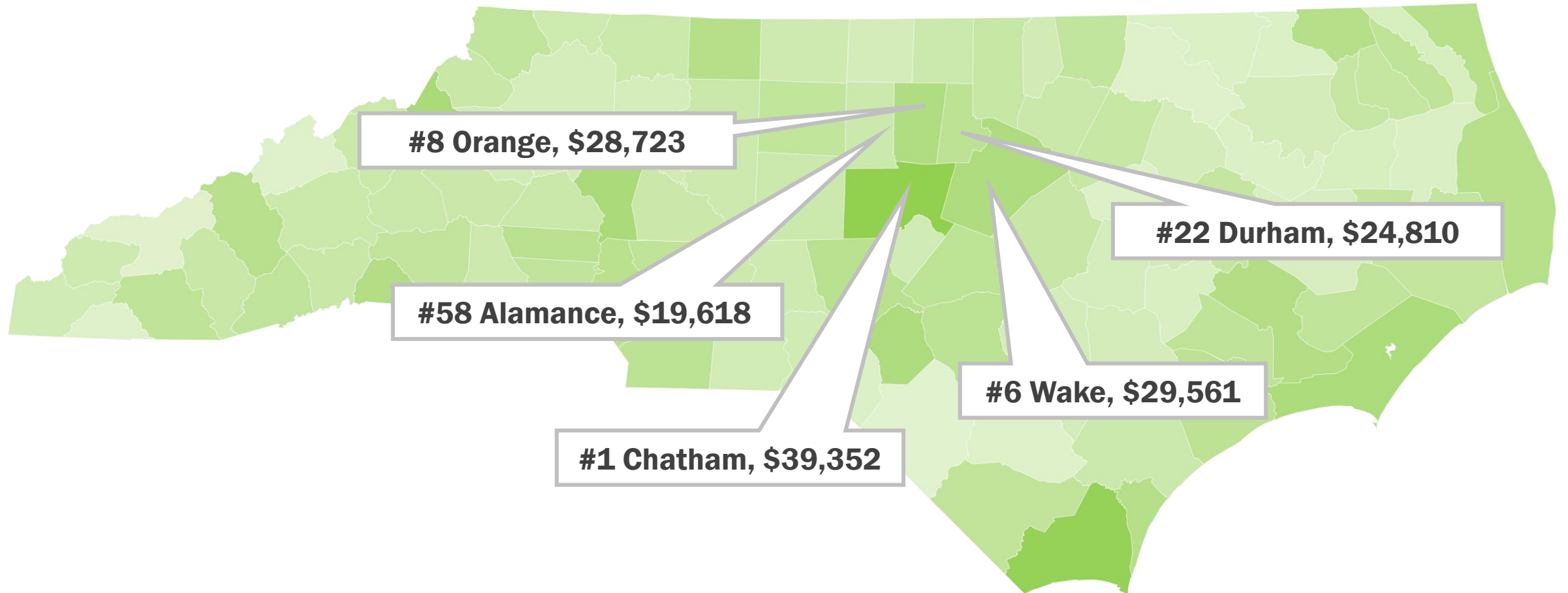
Hispanic per capita income is the total income earned by Hispanic residents in an area divided by the total number of Hispanic residents in that area



Source: American Community Survey (2020-2024 5-Year Estimates)

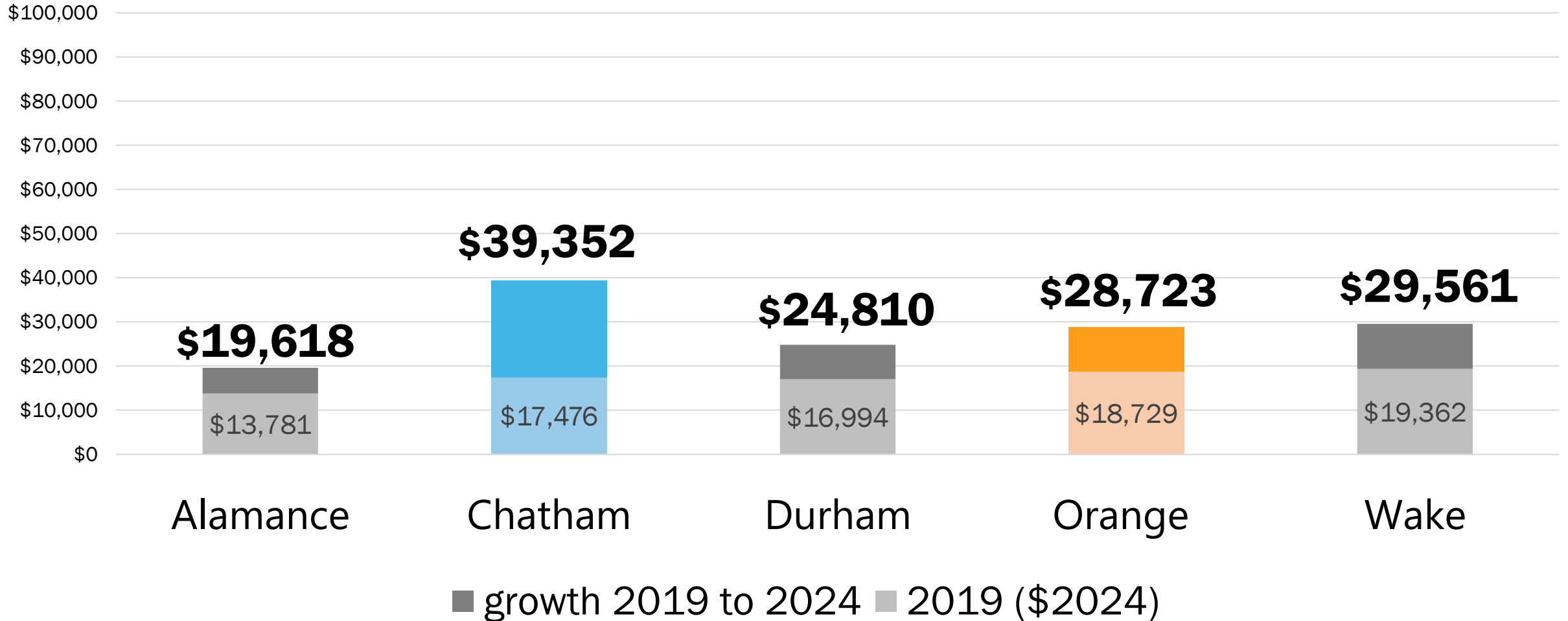
# Hispanic Per Capita Income | Orange = \$28,723 (8<sup>th</sup> in NC)

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



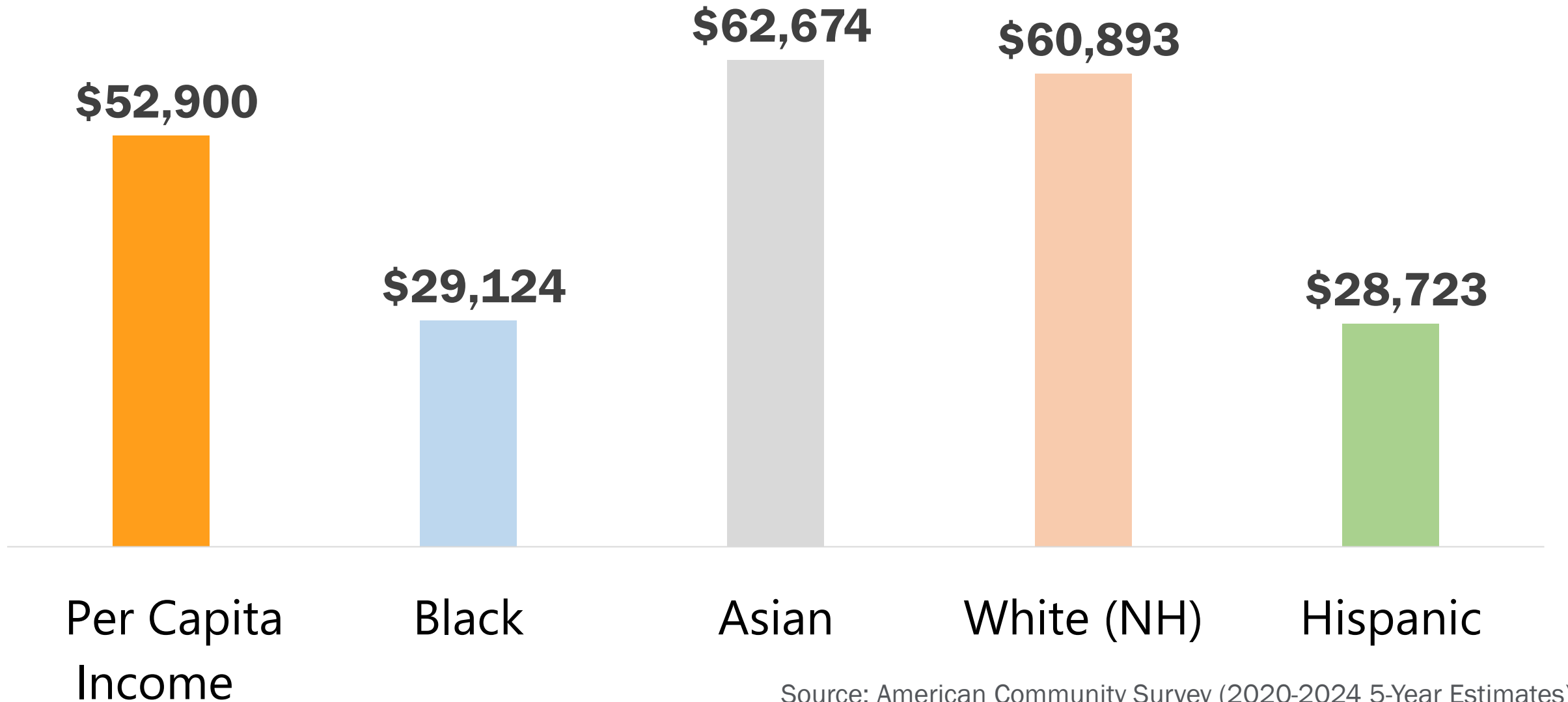
# County Hispanic Per Capita Income 2024, with Change from 2019

Hispanic per capita income is the total income earned in an area divided by the total number of Hispanic residents in that area (inflation adjusted \$2024)



# Orange County Per Capita Income by Race/Ethnicity

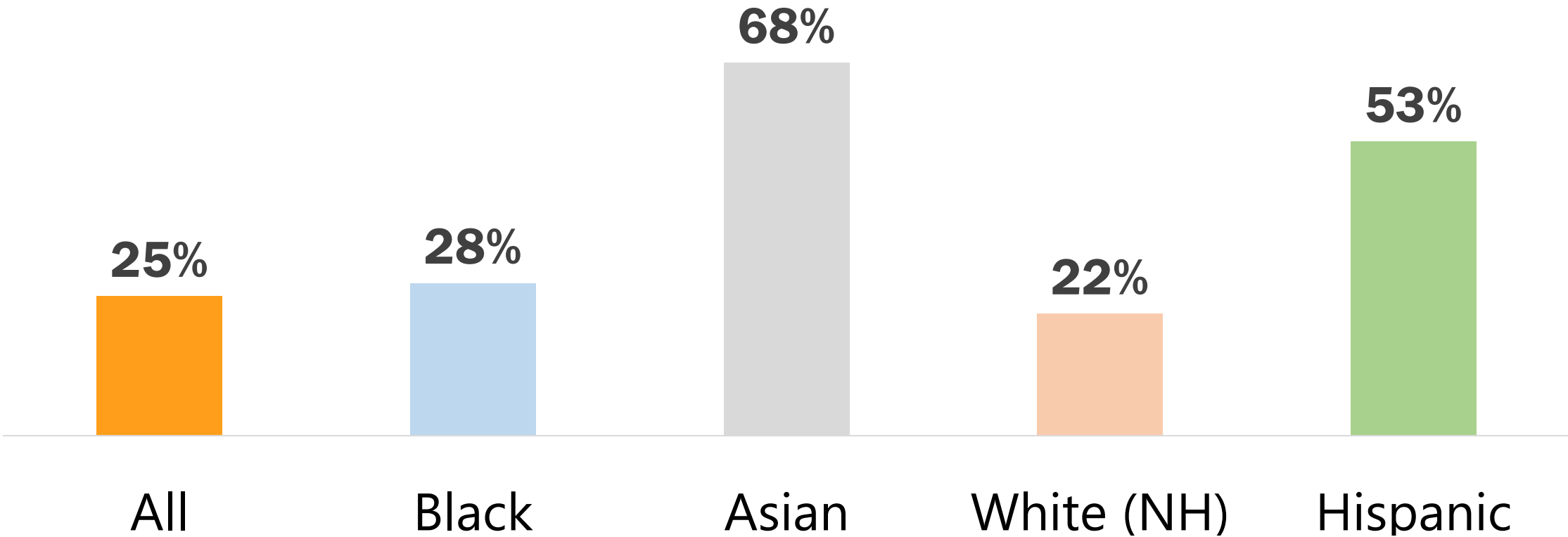
Per capita income is the total income earned in an area divided by the total number of residents in that area



Source: American Community Survey (2020-2024 5-Year Estimates)

# Orange County Per Capita Income Growth from 2019 to 2024, Inflation Adjusted \$2024

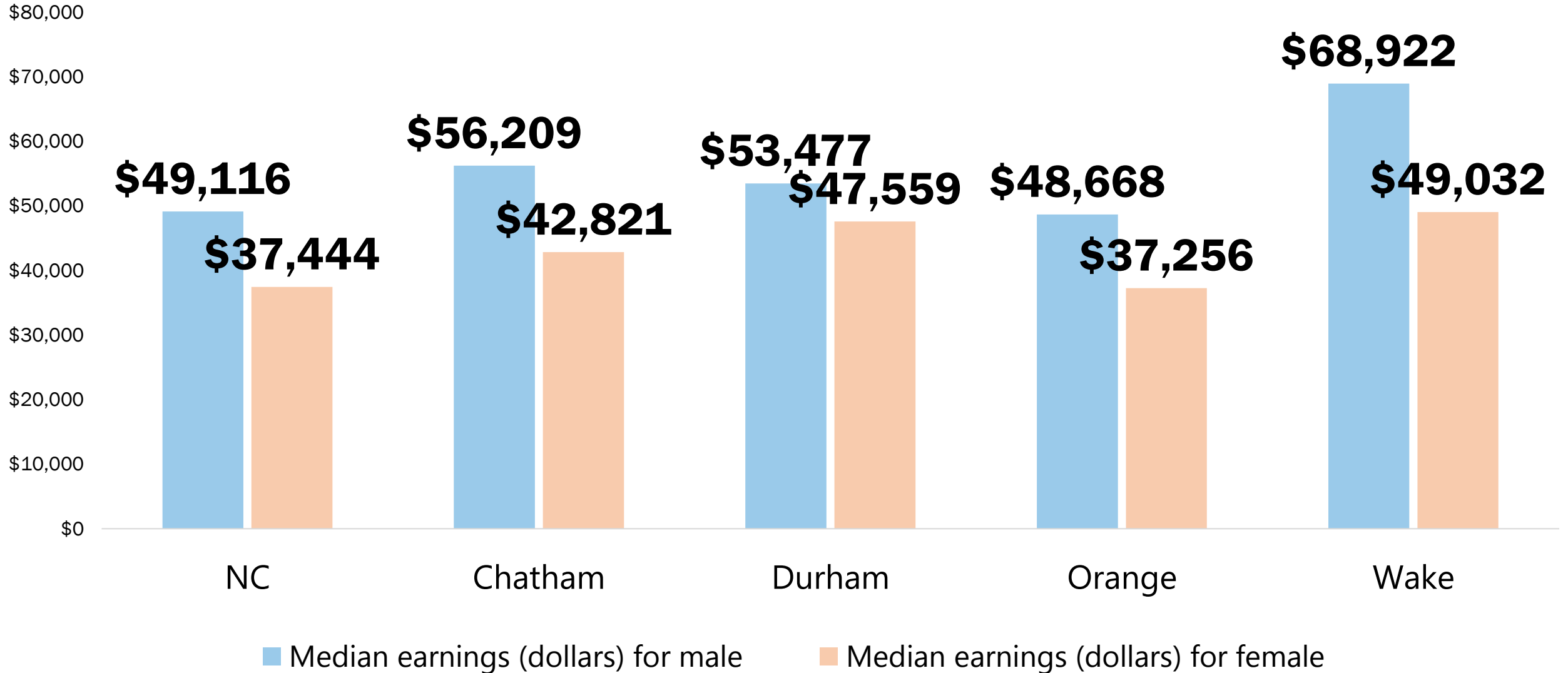
Per capita income is the total income earned in an area divided by the total number of residents in that area



Source: American Community Survey (2020-2024 5-Year Estimates)

# Wages and Gender

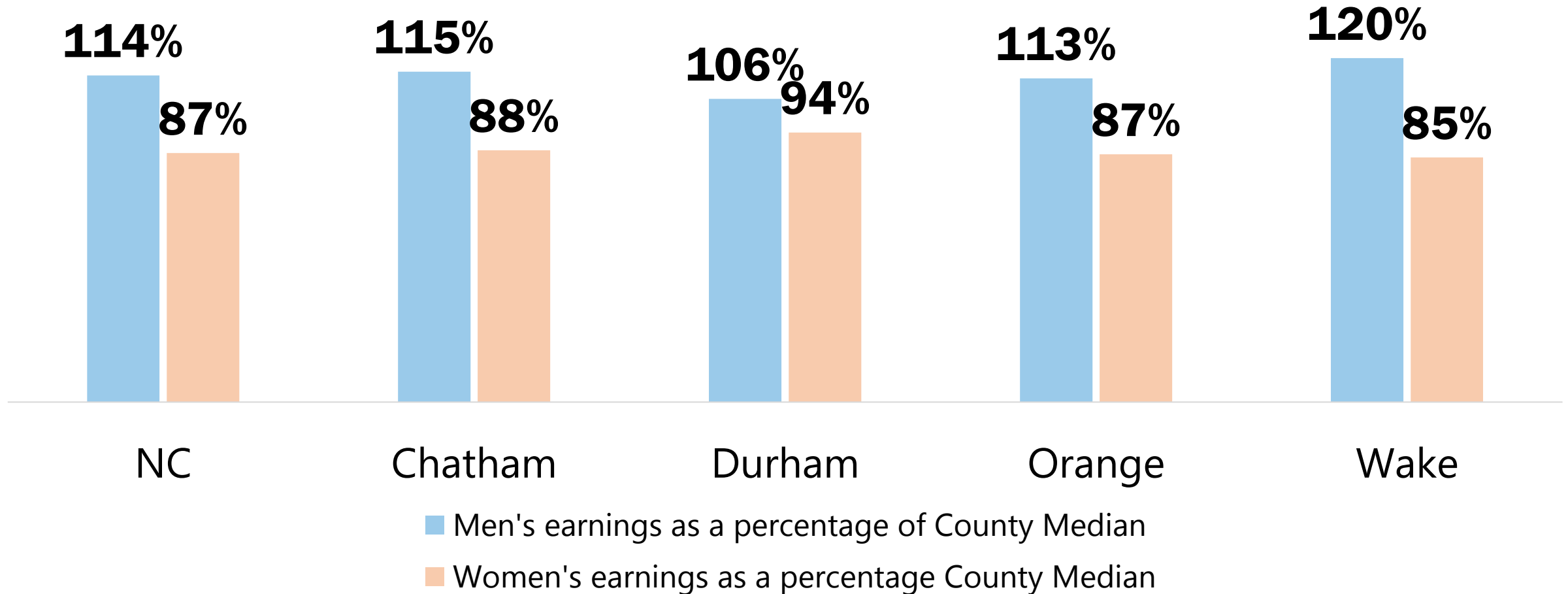
# Female & Male Median Earnings by County



Source: American Community Survey (2020-2024 5-Year Estimates)

# Female & Male Earnings by County as % of Median

As a percentage of county median

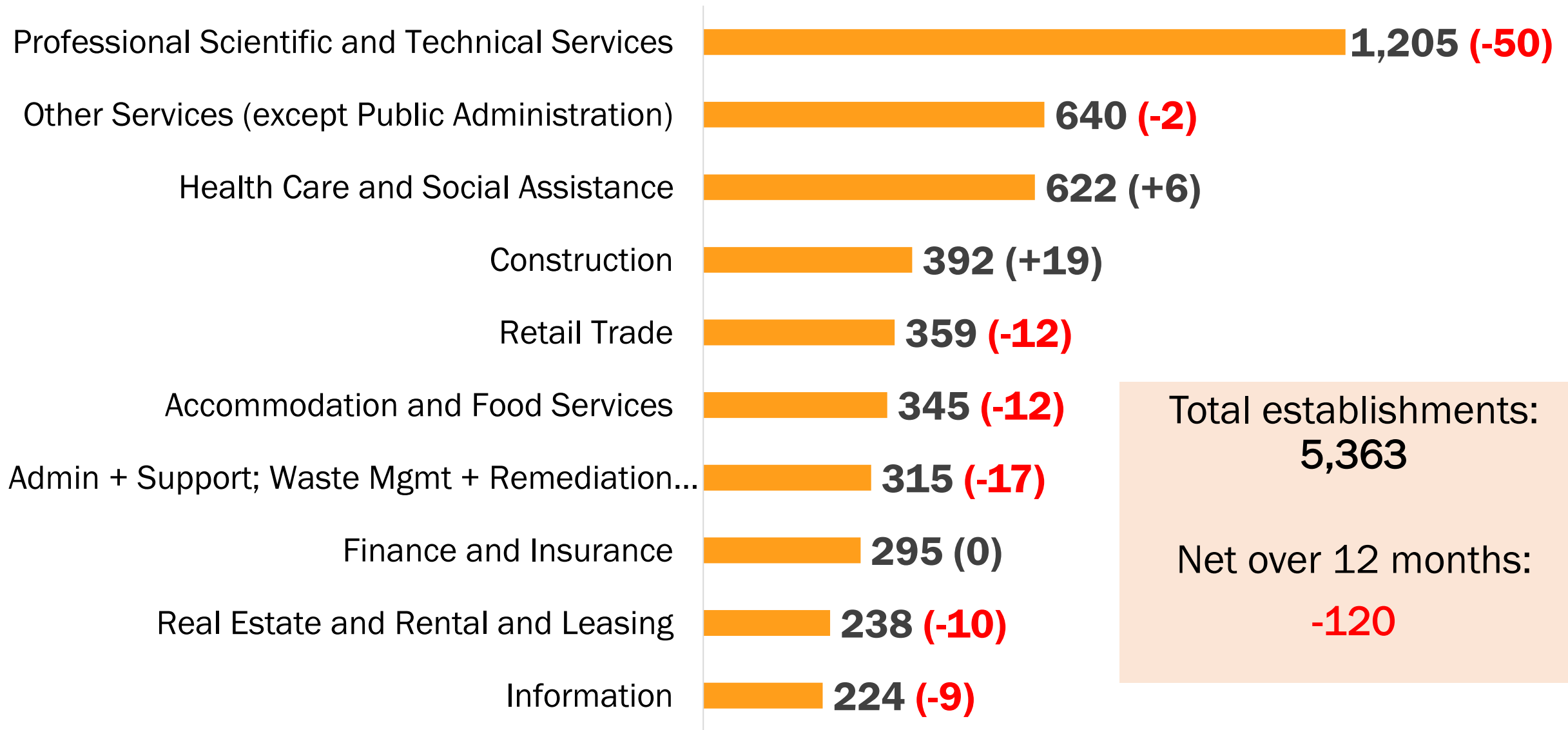


Source: American Community Survey (2020-2024 5-Year Estimates)

**Economy: Industry**

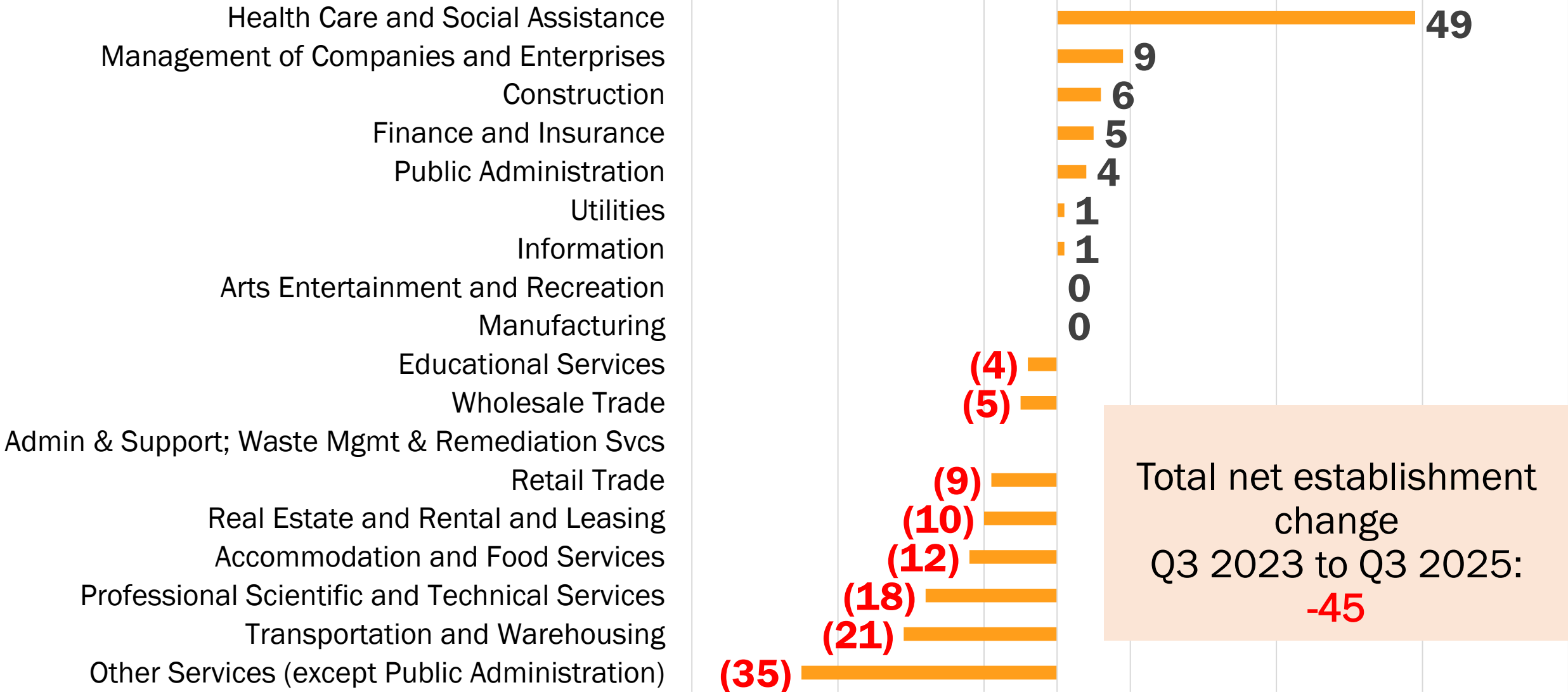
# Orange County Top 10 Industries by Number of Establishments

Total number of establishments in Orange County in Quarter 3, 2025 and change from Q3 2024 (by NAICS code)



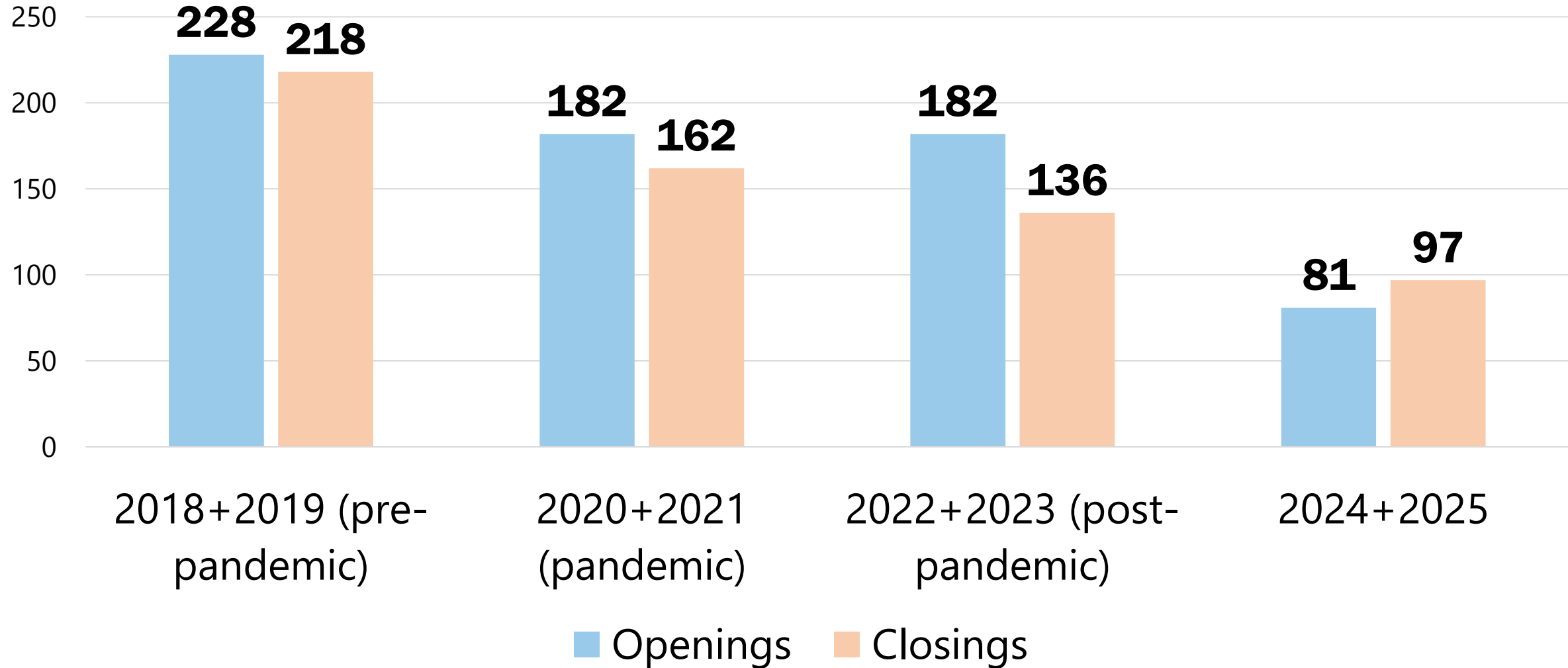
Source: Quarterly Census of Employment and Wages via NC Department of Commerce

# Change in Number of Orange County Establishments from Q3 2023 to Q3 2025



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

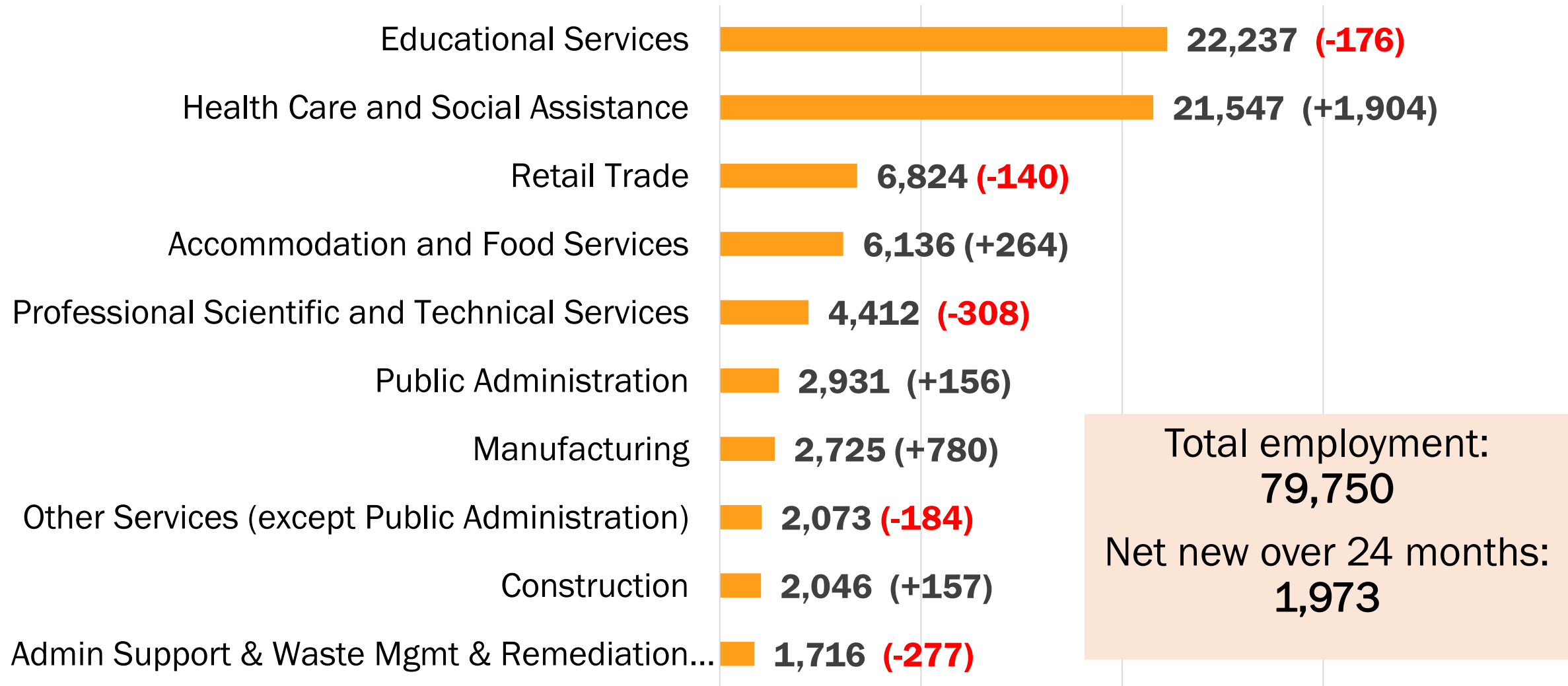
# Orange County Restaurant & Food Service Establishments Openings and Closings by Biennium



Source: Orange County Health Department

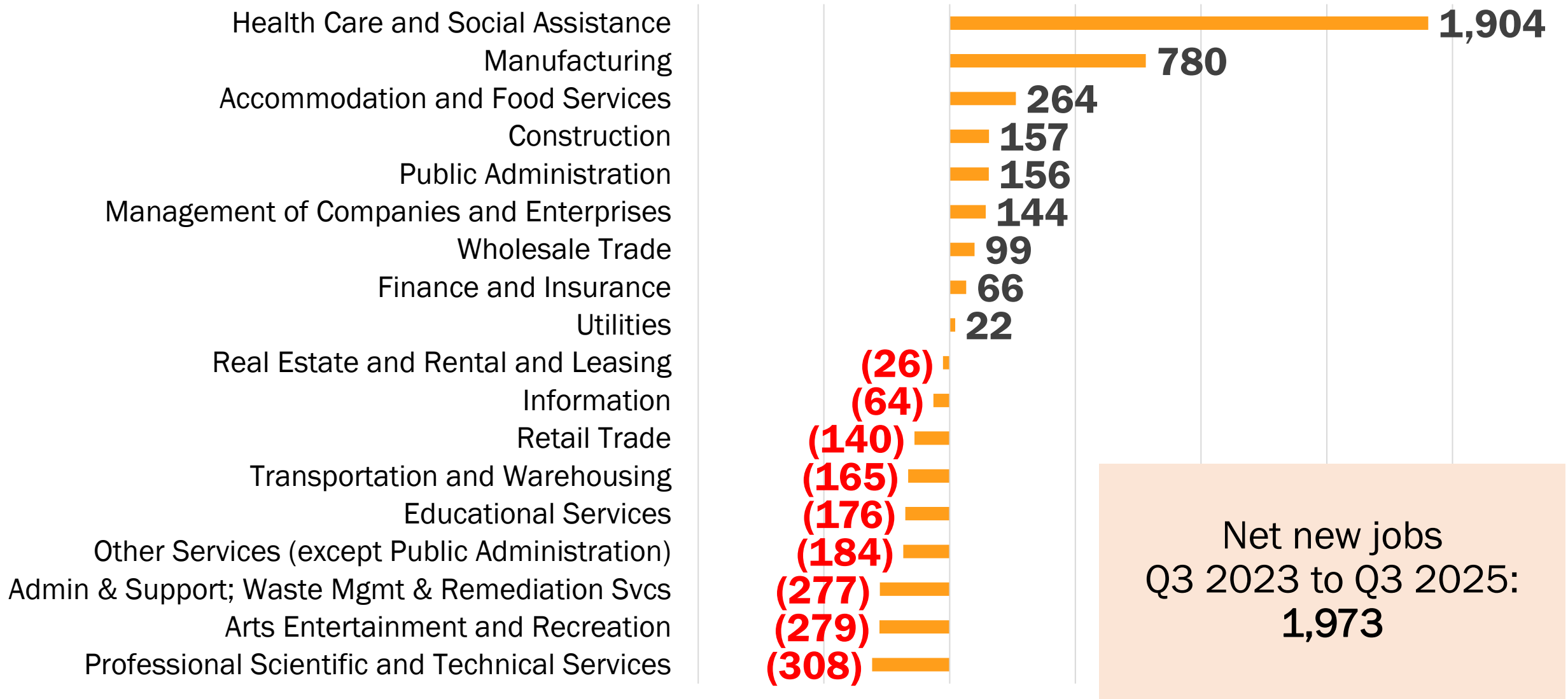
# Orange County Top 10 Industries by Employment

Average number of employees employed by industry in Quarter 3, 2025 and change from Q3 2023 (by NAICS code)



Source: Quarterly Census of Wages via NC Department of Commerce

# Change in Number of Orange Co. Jobs Q3 2023 to Q3 2025



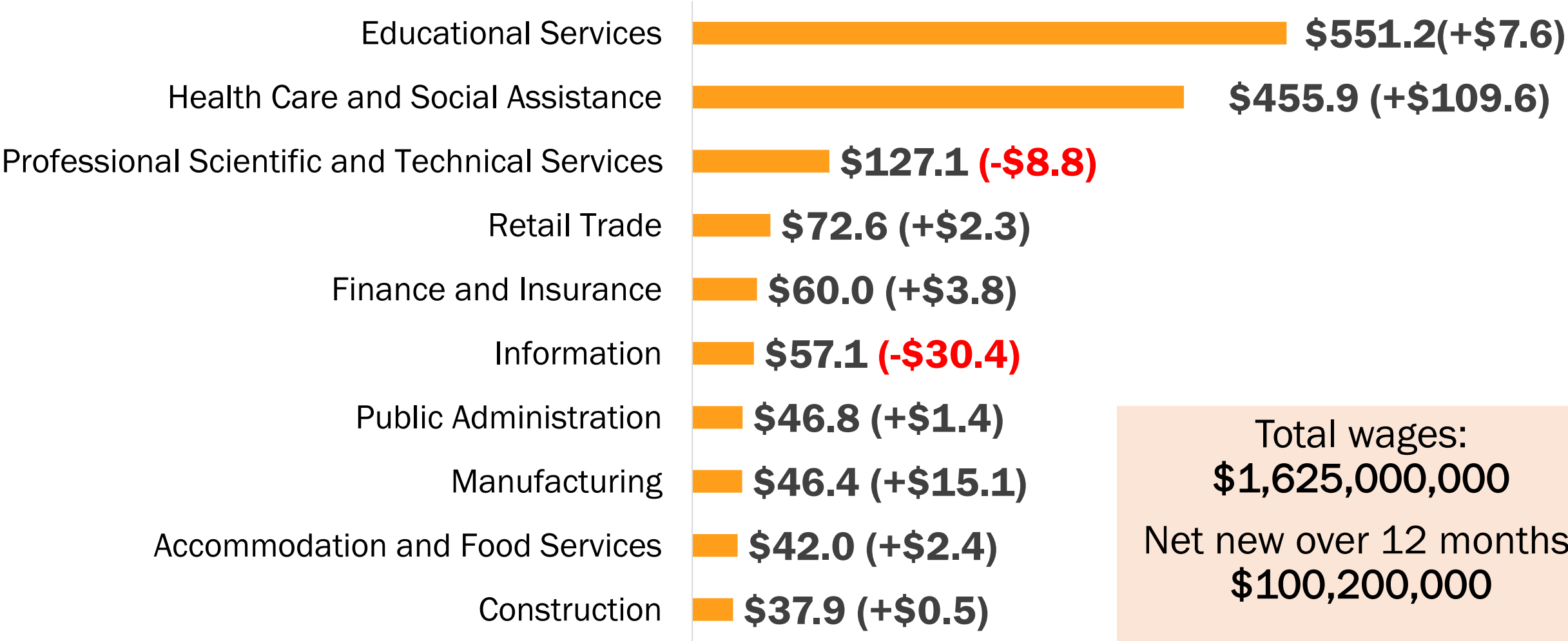
Source: Quarterly Census of Employment and Wages via NC Department of Commerce

# Orange County's Top 20 Employers, 2025

1. UNC Chapel Hill
2. UNC Health
3. Chapel Hill-Carrboro City Schools
4. Orange County Government
5. Orange County Schools
6. ABB/Industrial Connections & Solutions
7. Sports Endeavors
8. Town of Chapel Hill
9. Wal-Mart Associates
10. Armacell
11. AKG of America
12. Medline Industries
13. Harris Teeter
14. Summit Design & Engineering Service
15. Wegmans
16. Carol Woods Retirement Community
17. Carolina Inn (Hyatt Corporation)
18. Food Lion
19. PHE, Inc.
20. Morinaga

# Top 10 Orange County Industries by Total Annual Wages

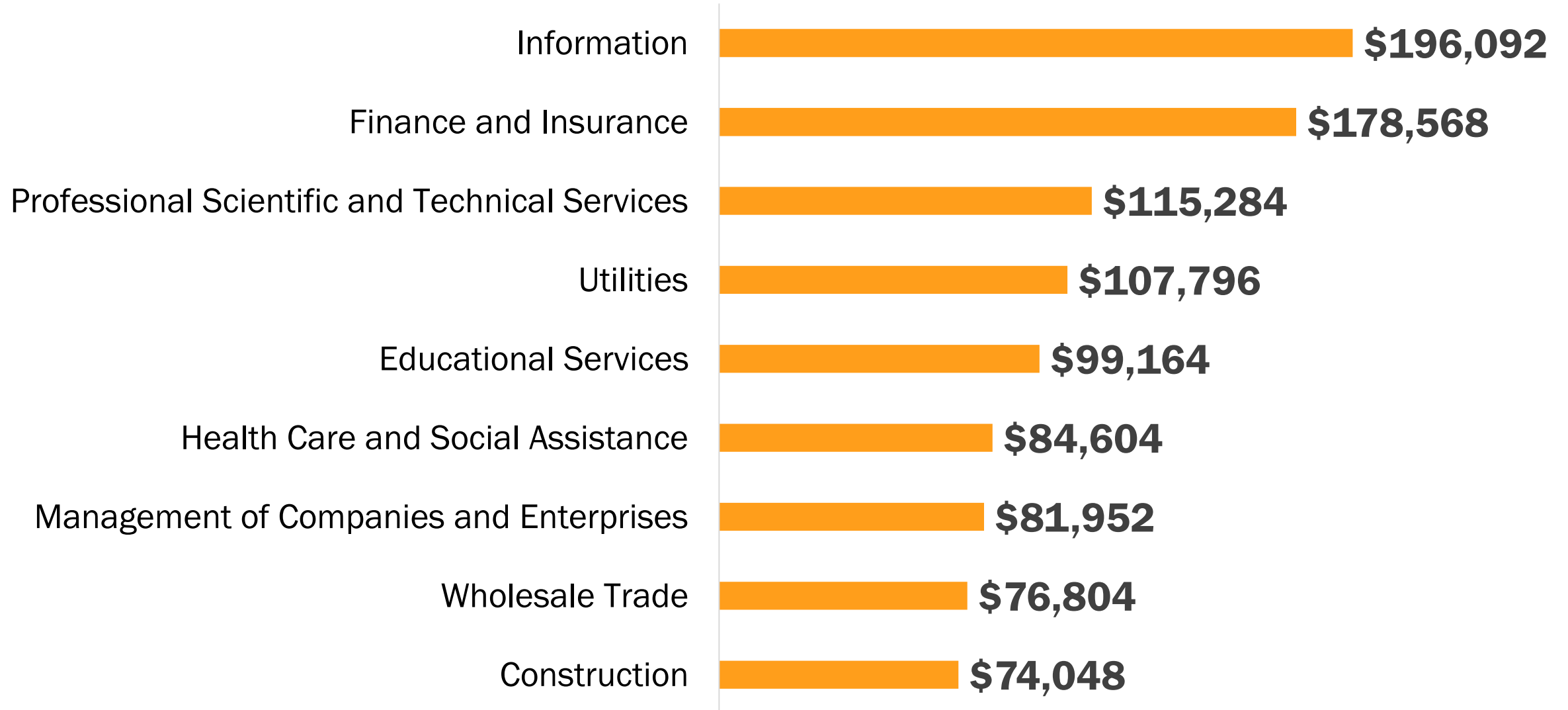
Q3 2025 total annual wages in millions (total wages = \$1.625 billion)



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

# Orange County Industries by Estimated Annual Wages

Calculated using average weekly wage data from Q3 2025 and multiplying by 52

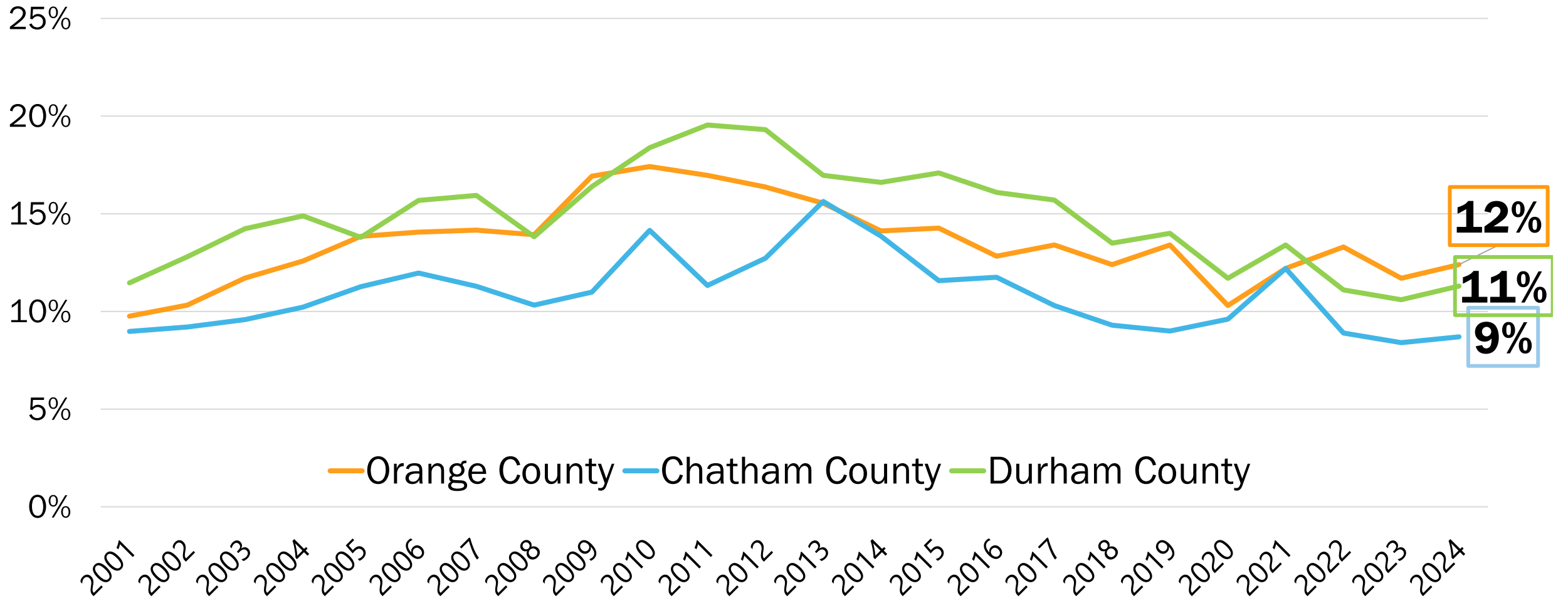


Source: Quarterly Census of Employment and Wages via NC Department of Commerce

# **Economy: Poverty**

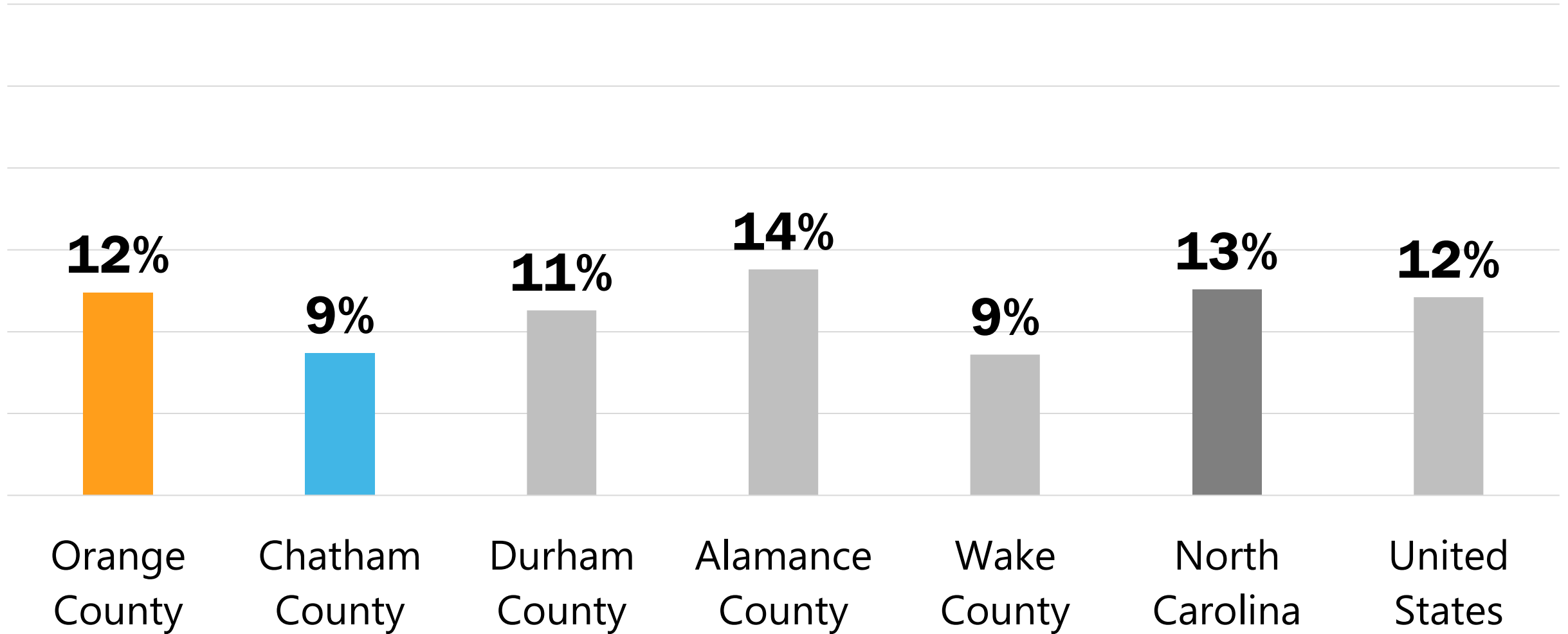
# Local Poverty Rates 2005-2024

Percent of people (all ages) in poverty



# Poverty Rate

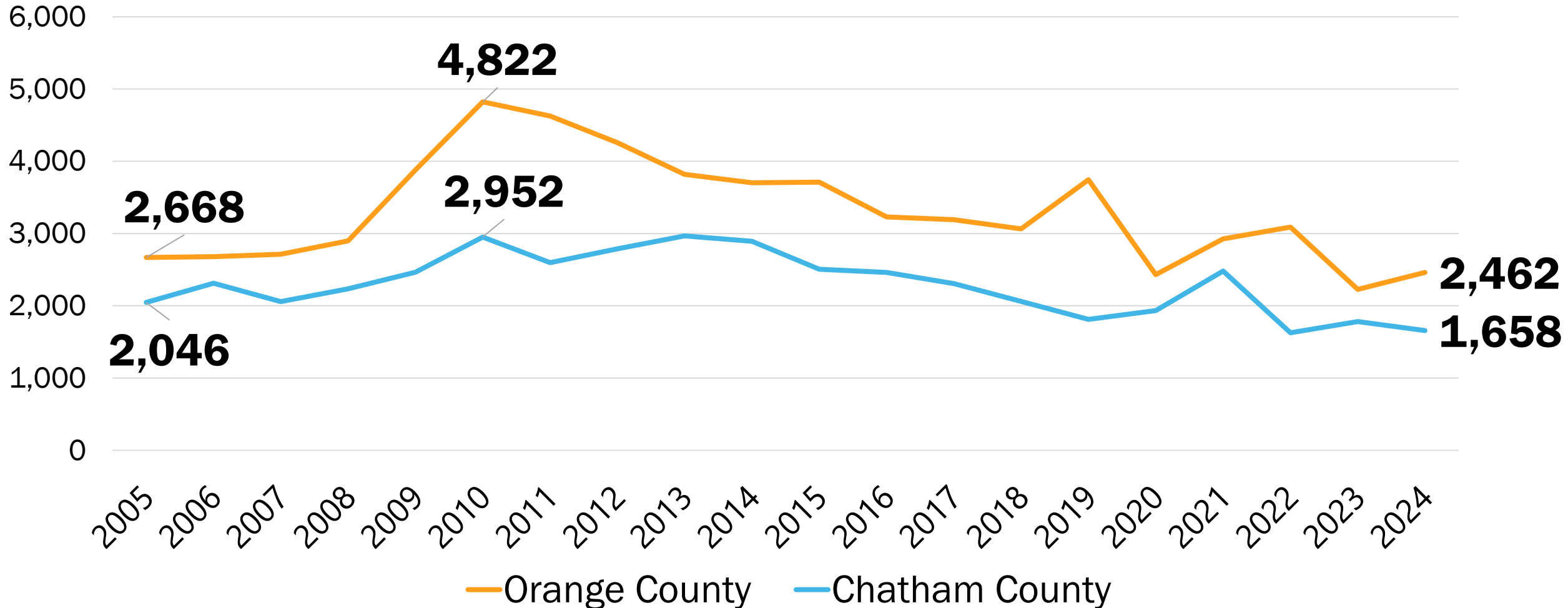
Percent of people (all ages) in poverty, 2024



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

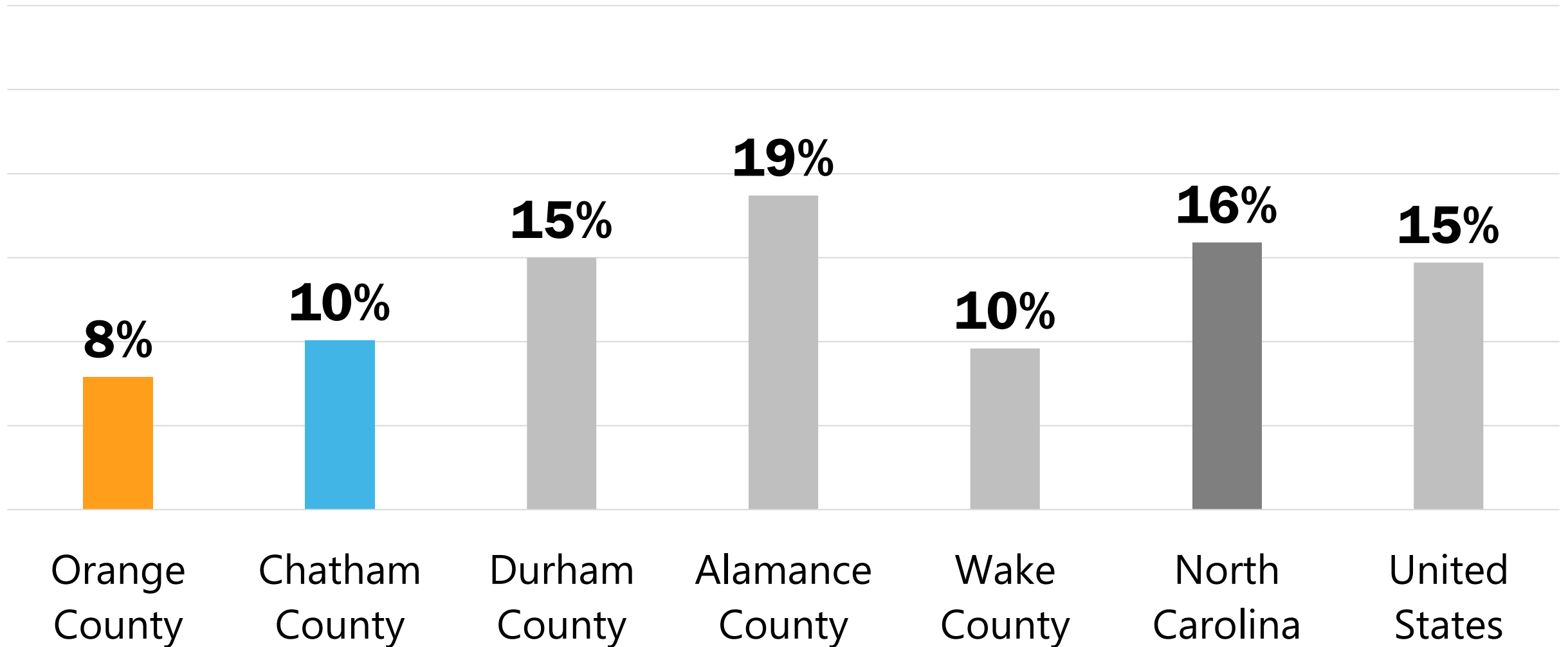
# Number of Children in Poverty

Number of children (under 18) in poverty, 2001-2024



# Child Poverty Rate

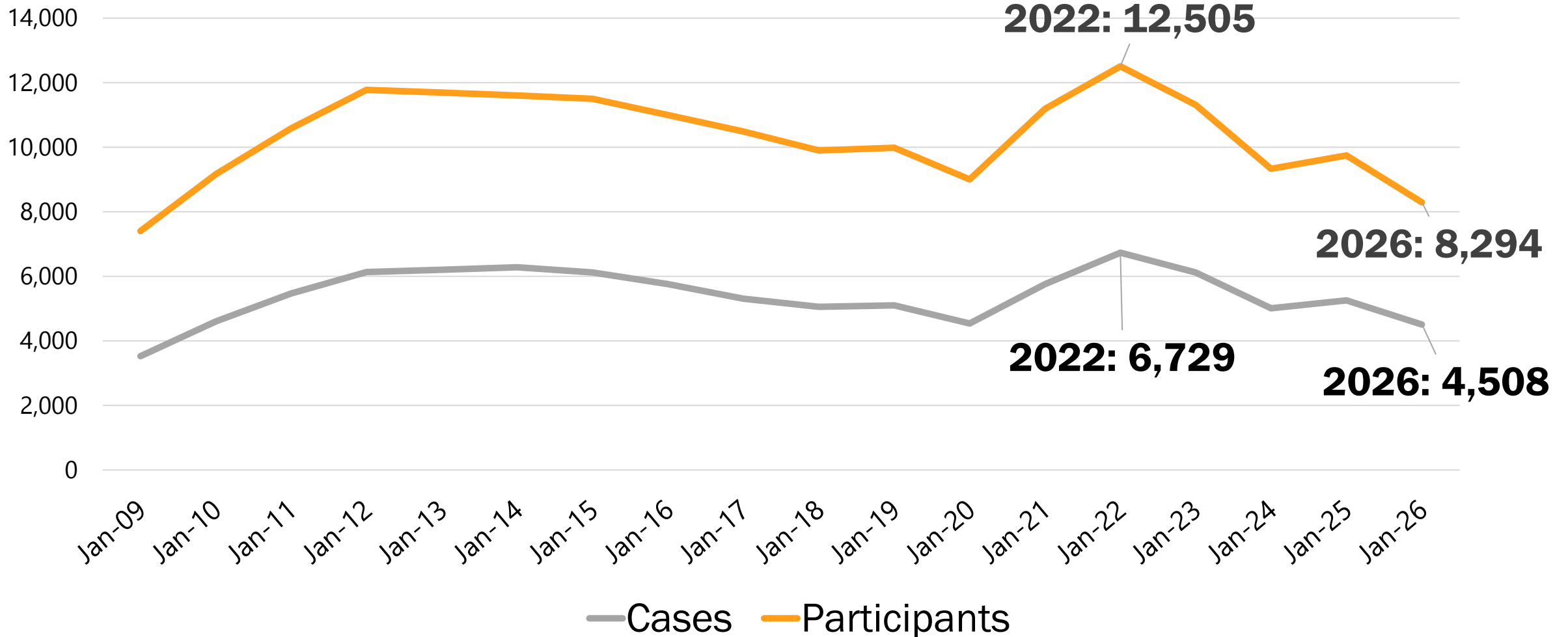
Percent of children (under 18) in poverty, 2024



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

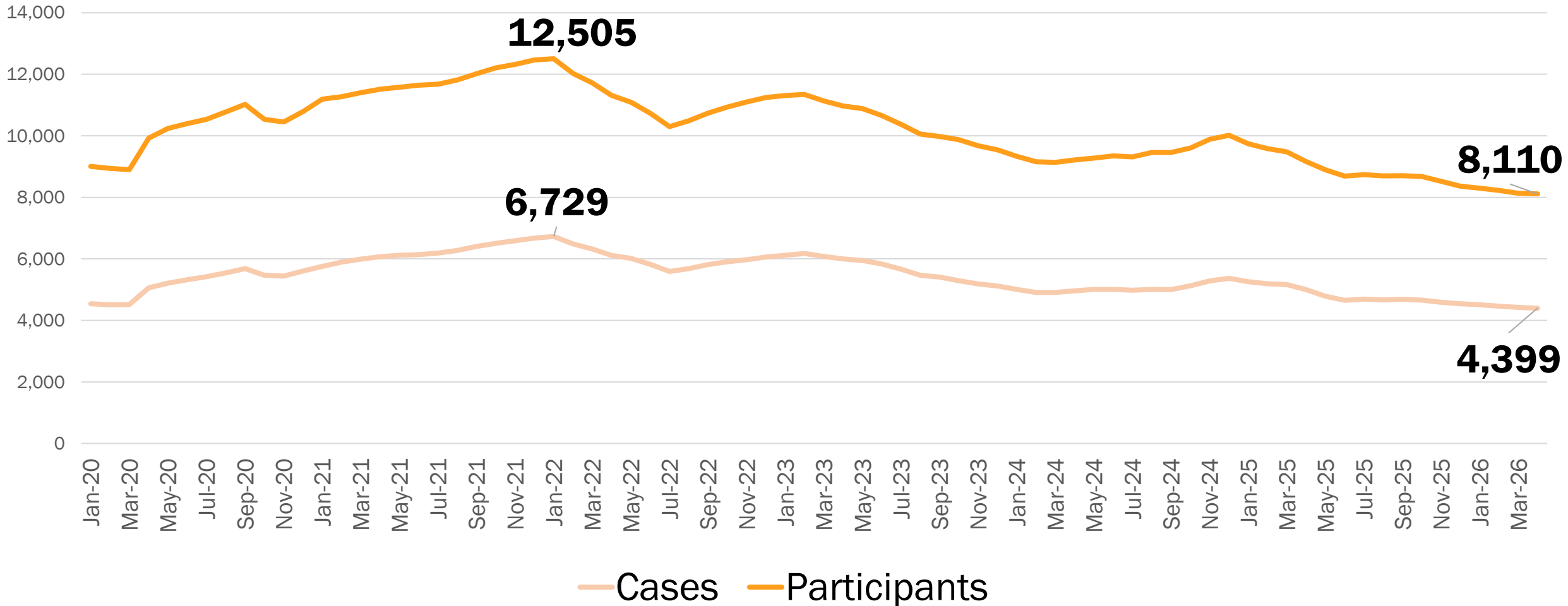
# Food & Nutrition Services – Orange County

Number of cases (families) and participants (individuals) receiving Orange County Food and Nutrition Services (FNS, formerly Food Stamps) in January each year 2007 through 2026



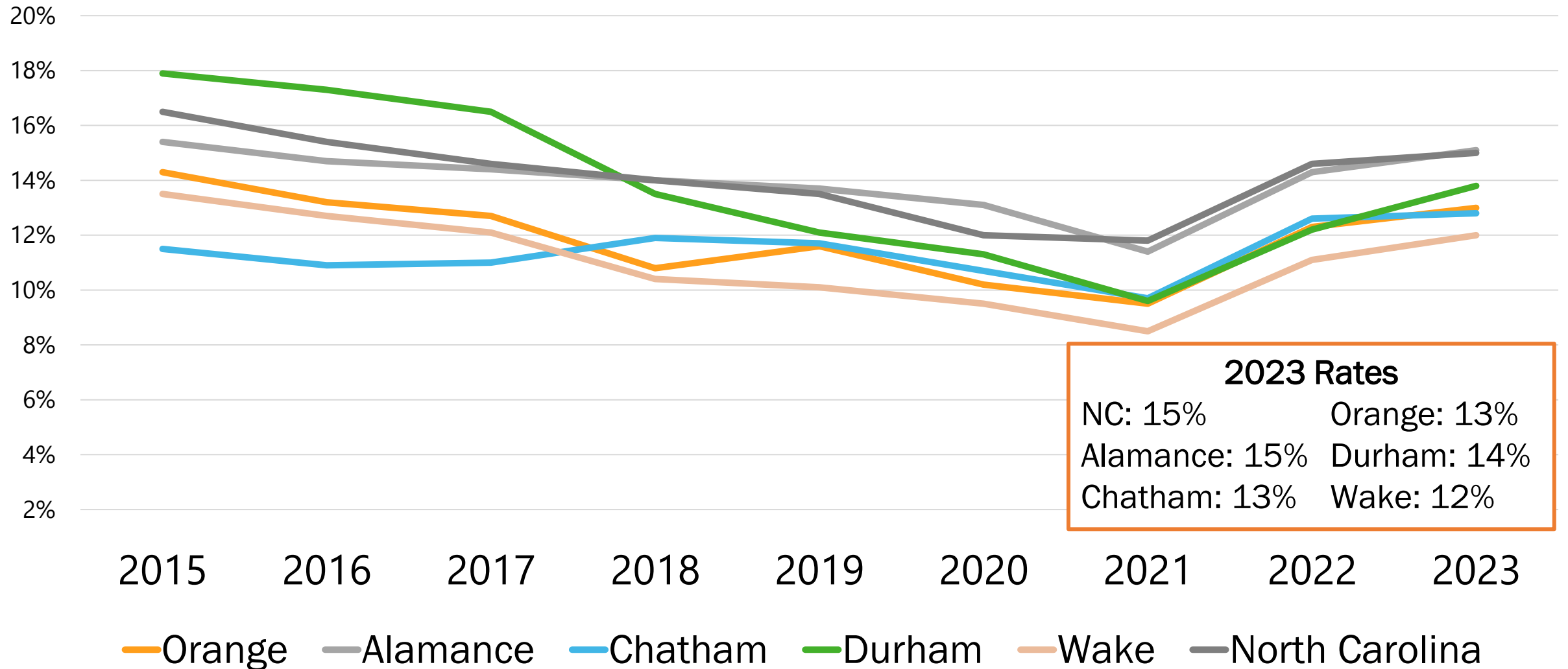
# Orange County Food & Nutrition Services Participants & Cases

Monthly from January 2020 to April 2026



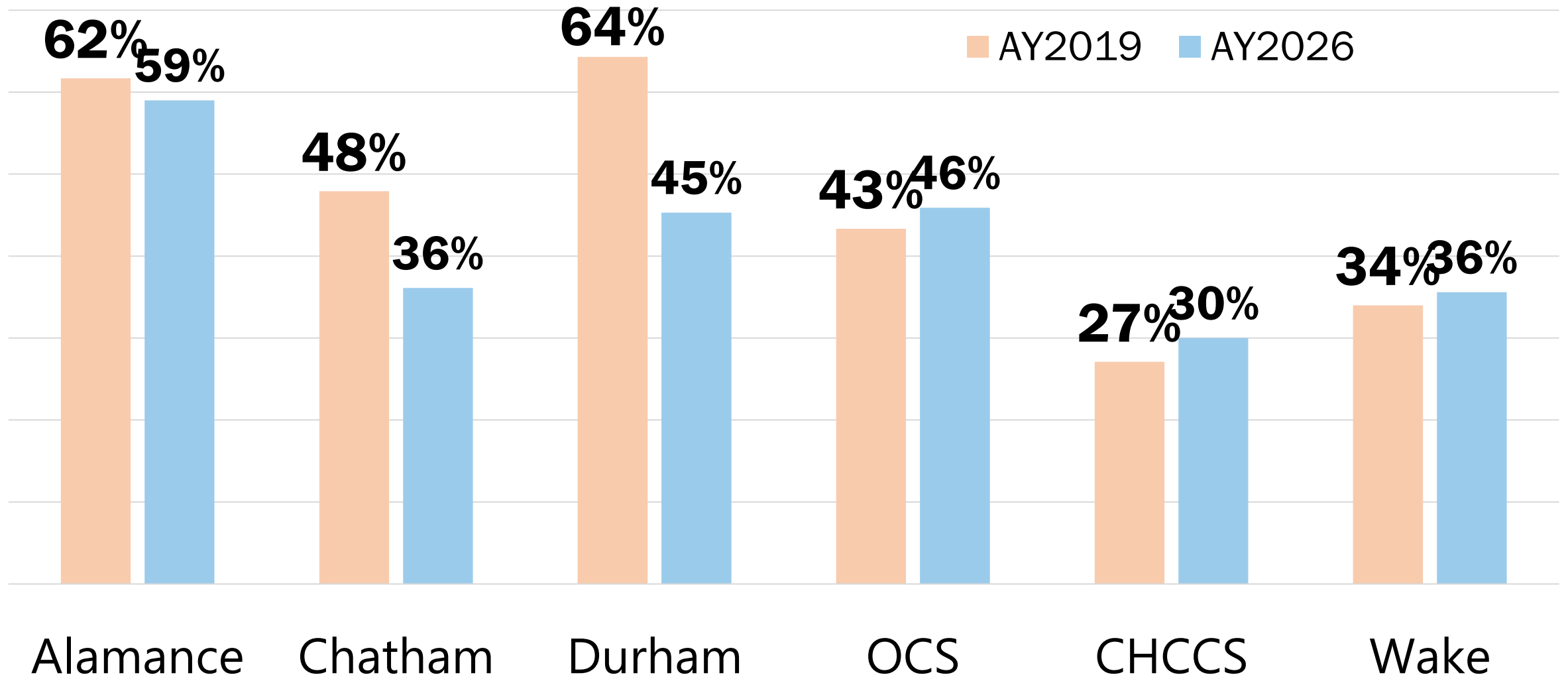
# Food Insecurity Rate Across the Region

Food insecurity is a lack of consistent access to enough food for an active, healthy life, 2023



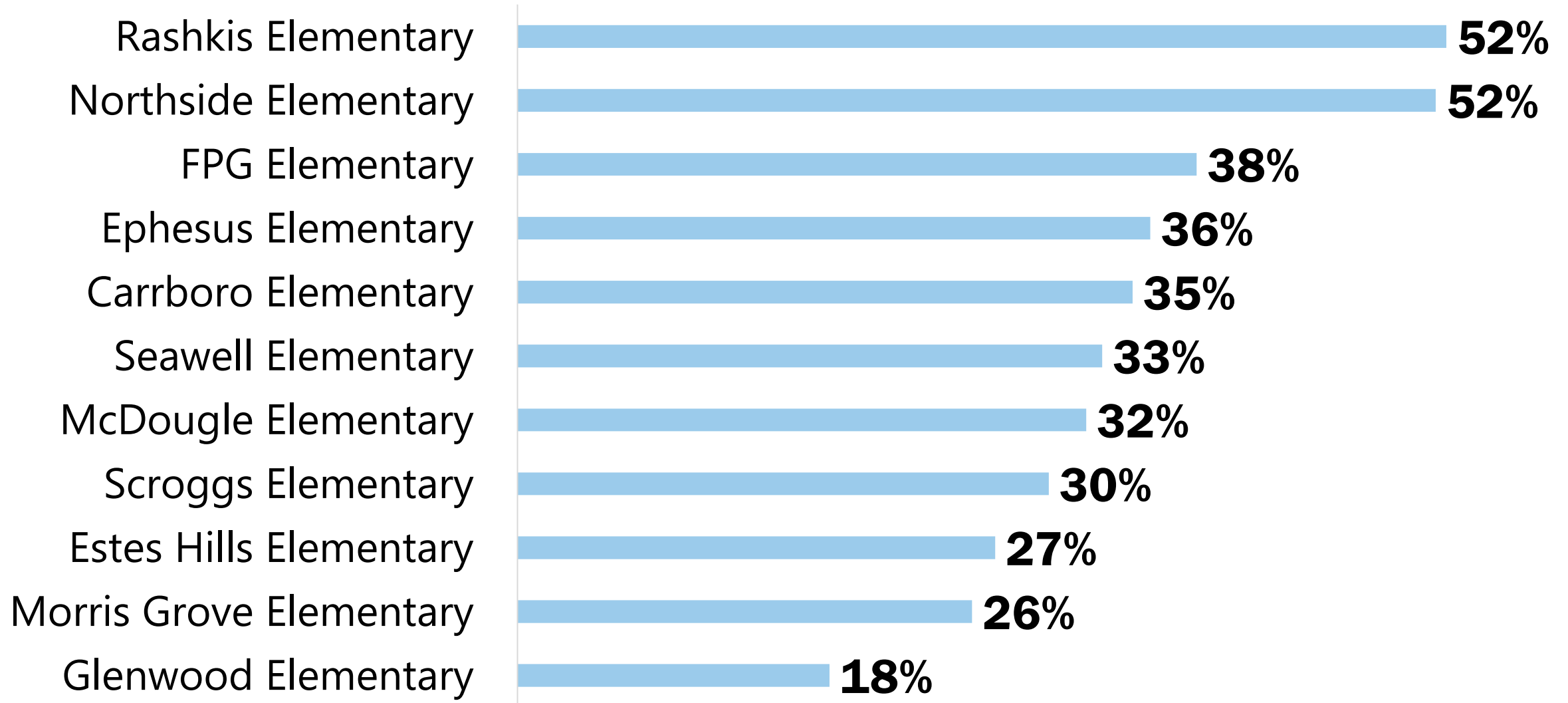
# Percent of Students Enrolled in Free and Reduced Lunch

AY2019 vs. AY2026



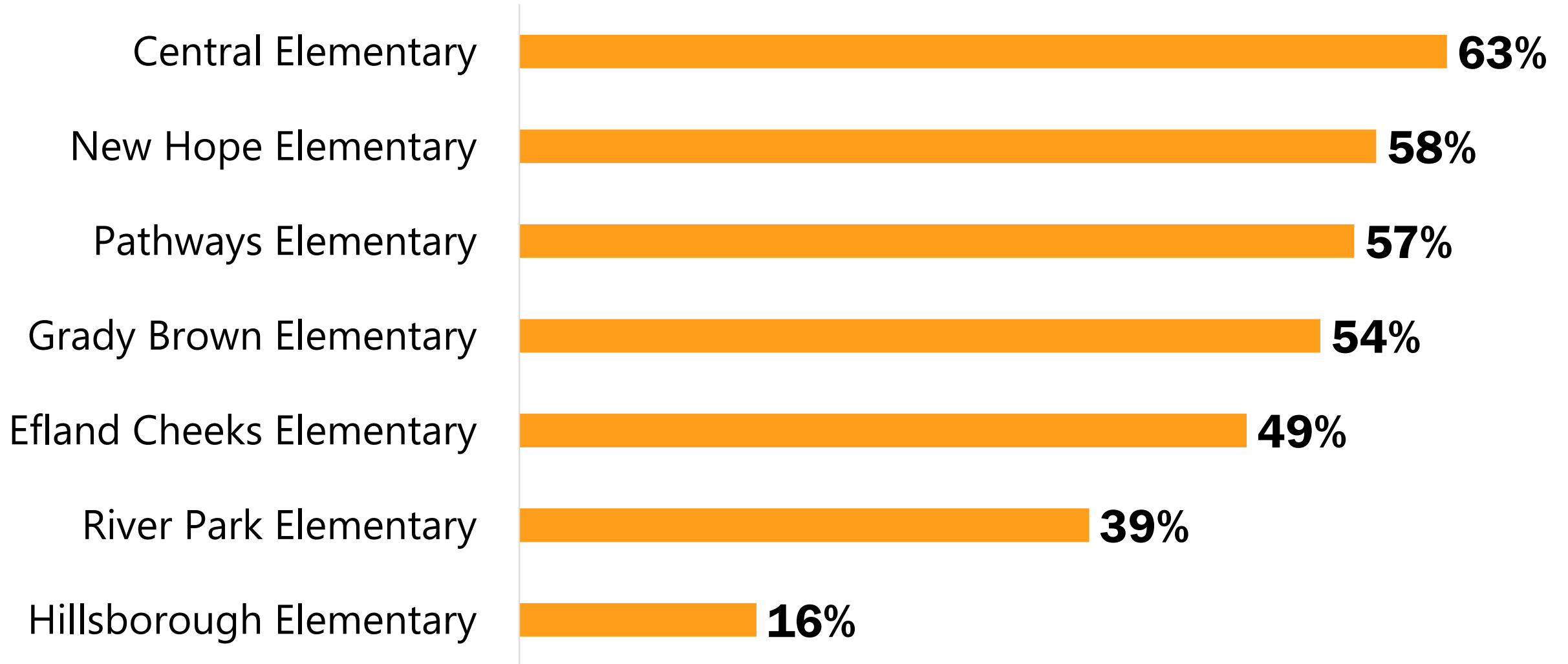
# CHCCS Elementary Students Enrolled in Free and Reduced Lunch

AY2026, Chapel Hill-Carrboro Schools elementary students enrolled in free and reduced lunch program



# OCS Elementary Students Enrolled in Free and Reduced Lunch

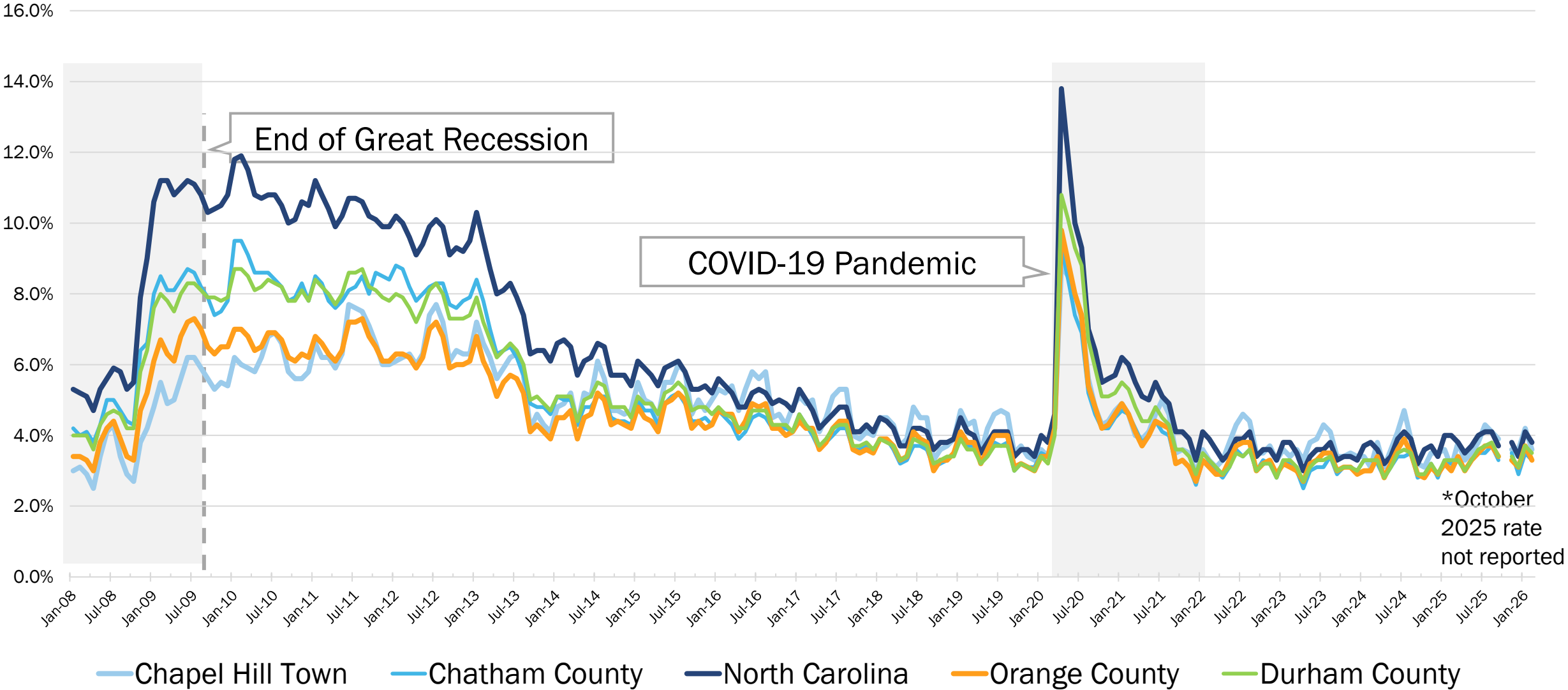
AY2026, Orange County Schools elementary students enrolled in free and reduced lunch program



# **Economy: Unemployment**

# Monthly Unemployment Rates

Monthly unemployment rate (unadjusted), Jan 2008 to Feb 2026

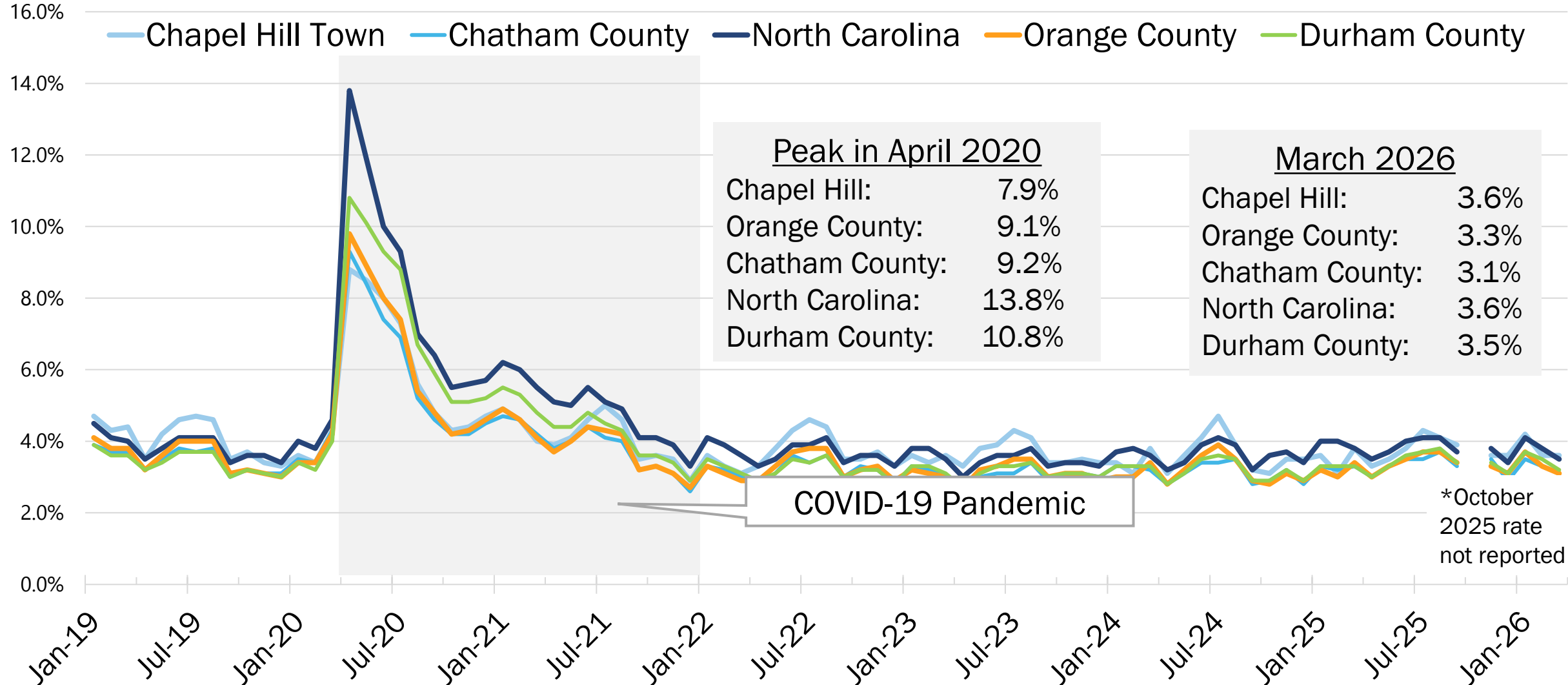


\*October 2025 rate not reported

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

# Monthly Unemployment Rates

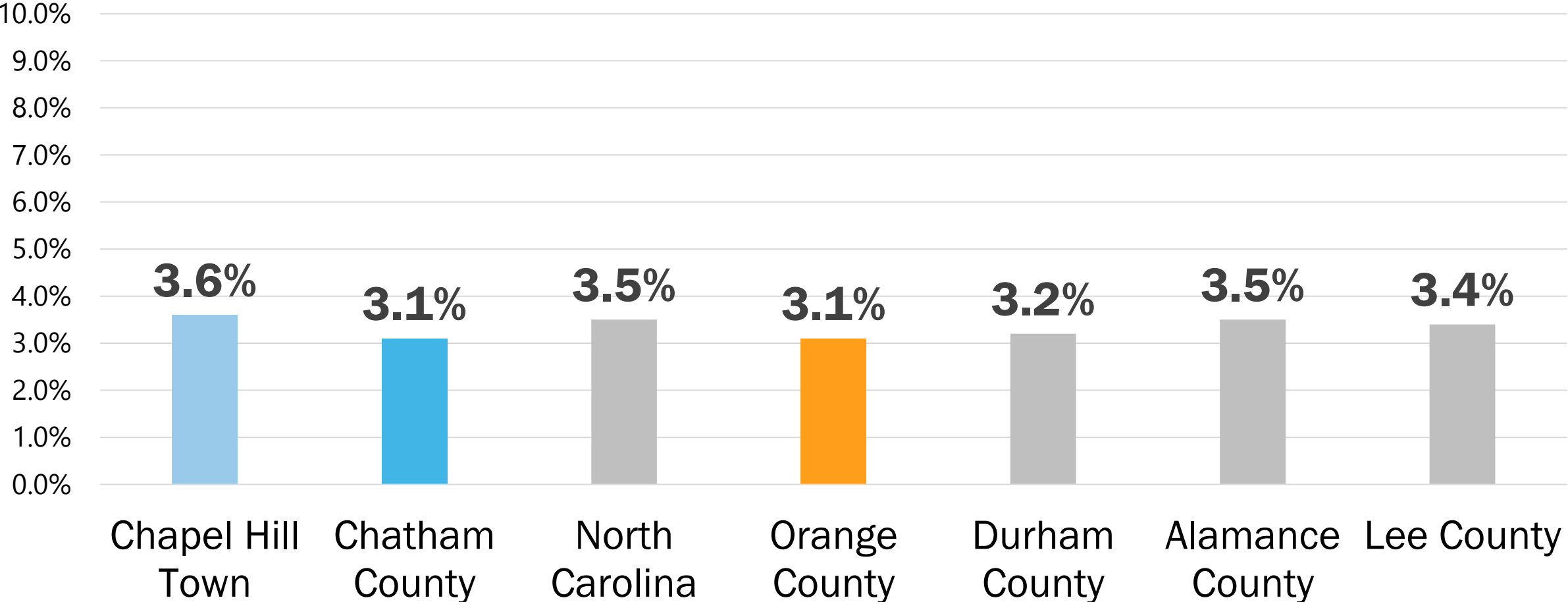
Monthly unemployment rate (unadjusted), Jan 2019 to Mar 2026



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

# Local Unemployment Rates

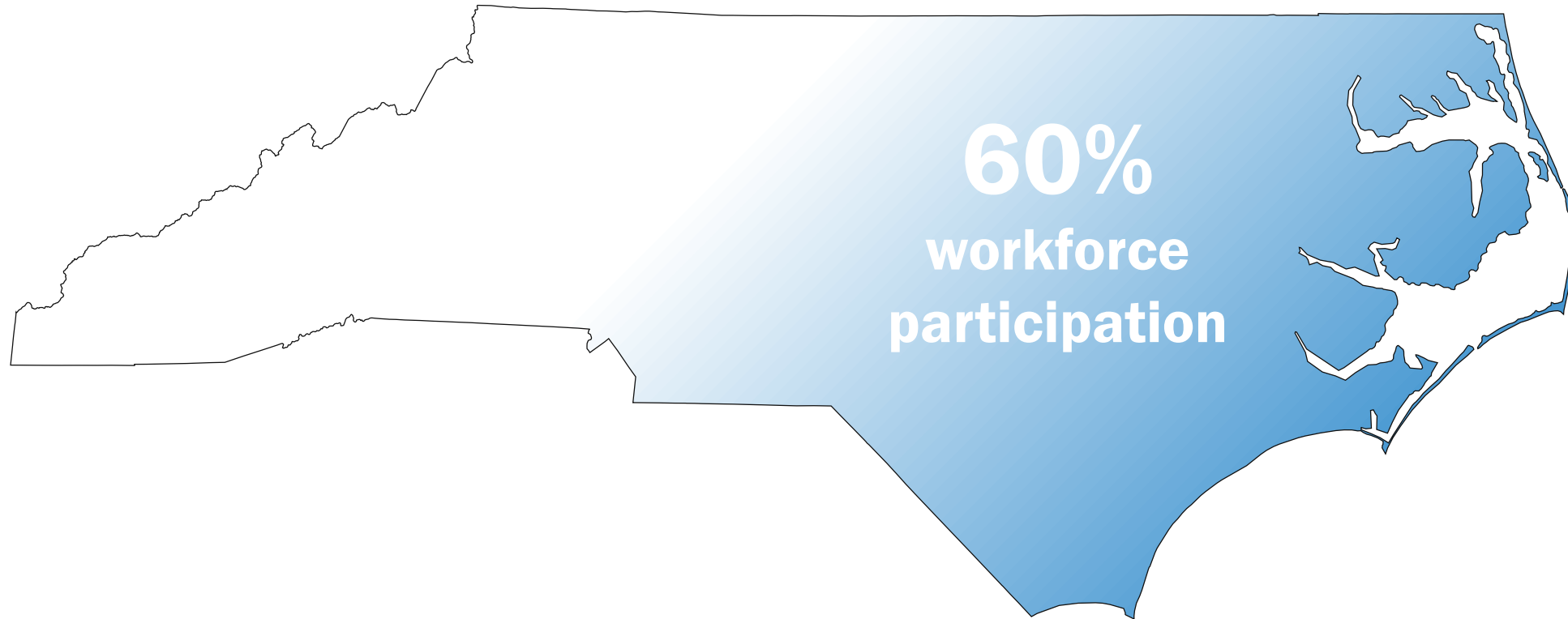
Local unemployment rate in March 2026, not seasonally adjusted



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

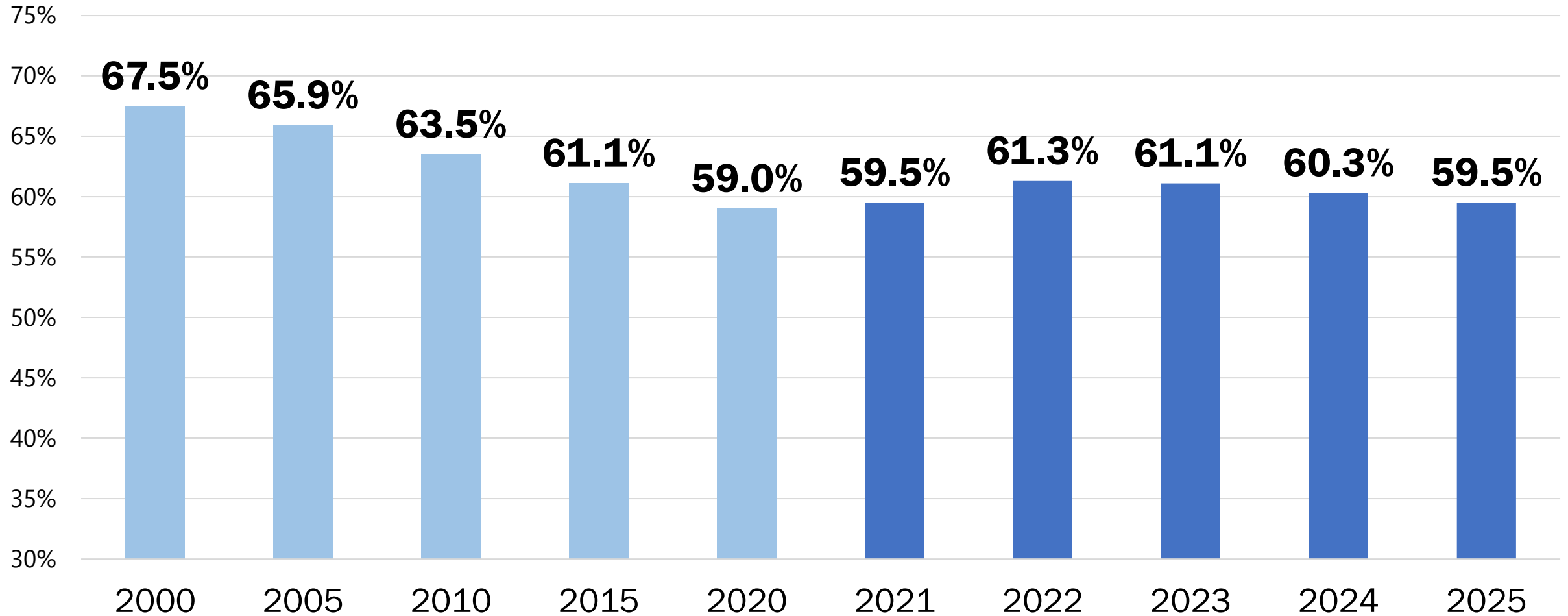
# NC Workforce Participation Rate

Percentage of adults (ages 18-65) who are either working or actively seeking a job, 2025



# North Carolina Workforce Participation Rate

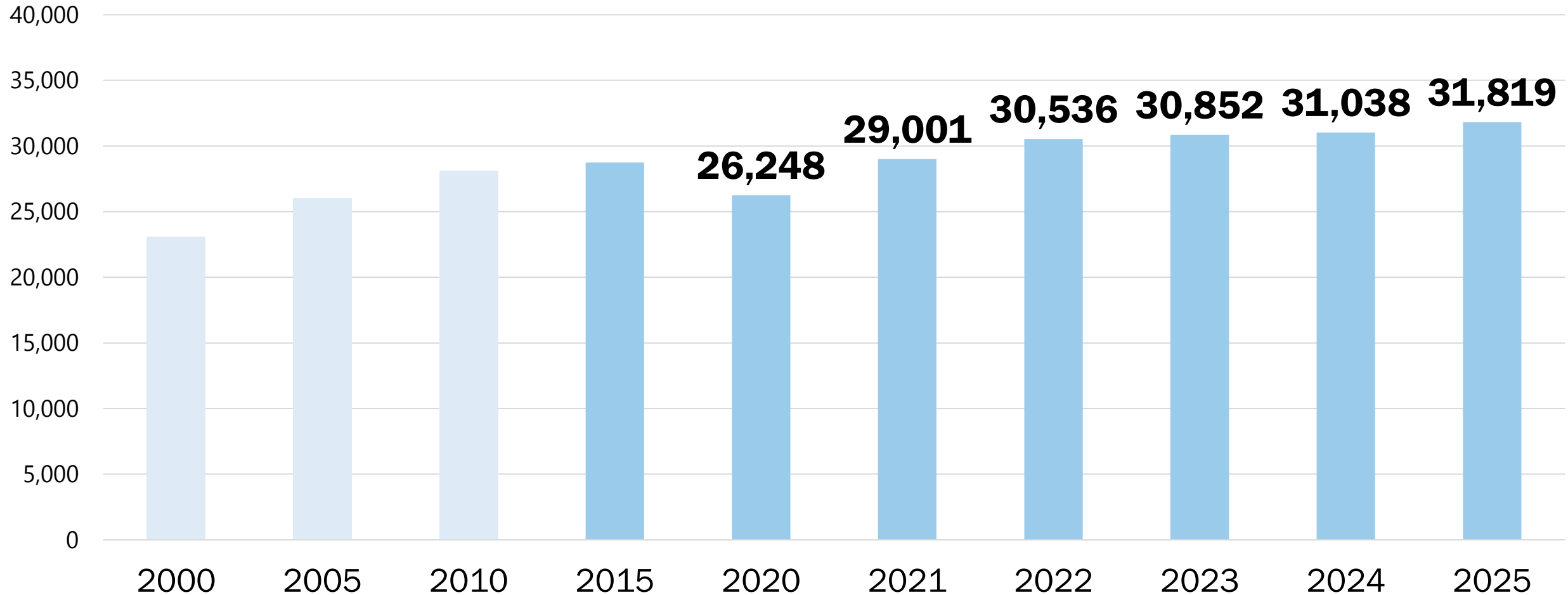
Percent of adults (ages 18-65) who are either working or actively seeking a job, 2000 to 2025



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

# Chapel Hill Total Workforce

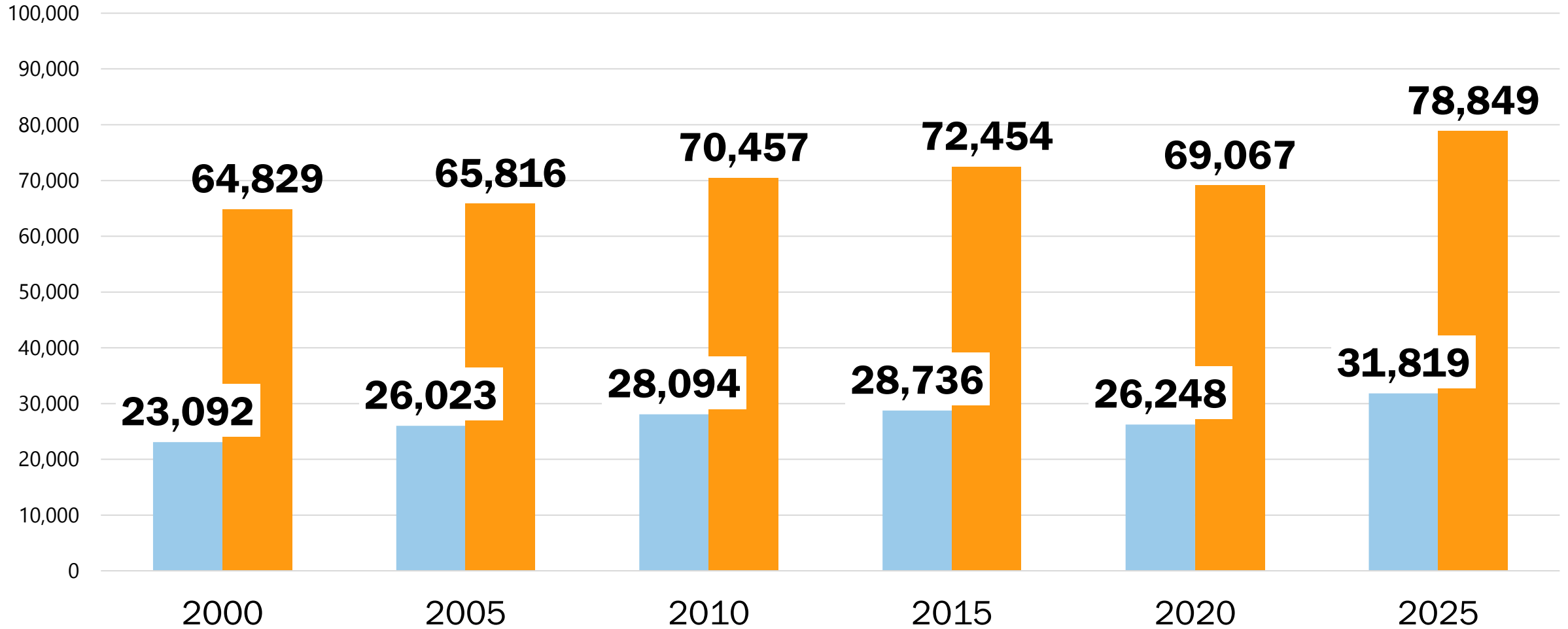
Number of adults (ages 18-65) who are either working or actively seeking a job, 2000 to 2025



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

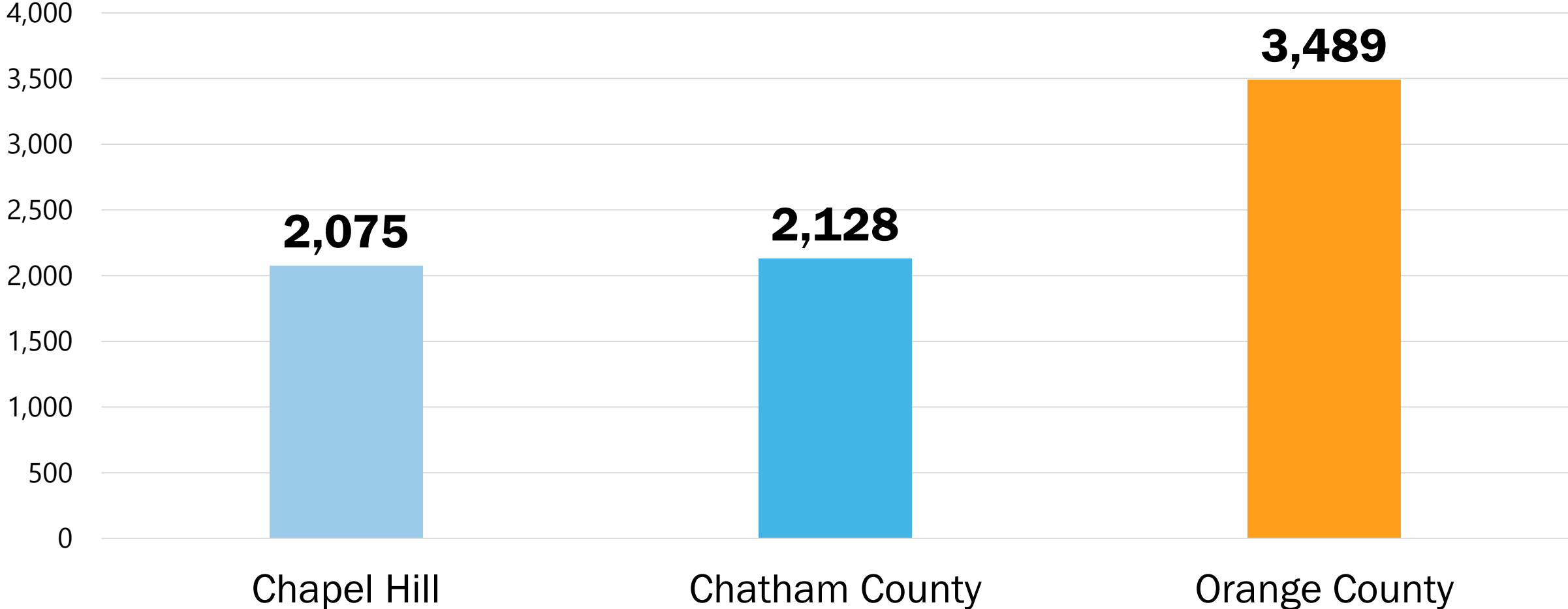
# Orange County Total Workforce

Number of adults (ages 18-65) who are either working or actively seeking a job, 2000 to 2025



# 3-Year Growth in Number of Working Residents

Adults (ages 18-65) who are either working or actively seeking a job, Jan 2023 to Jan 2026

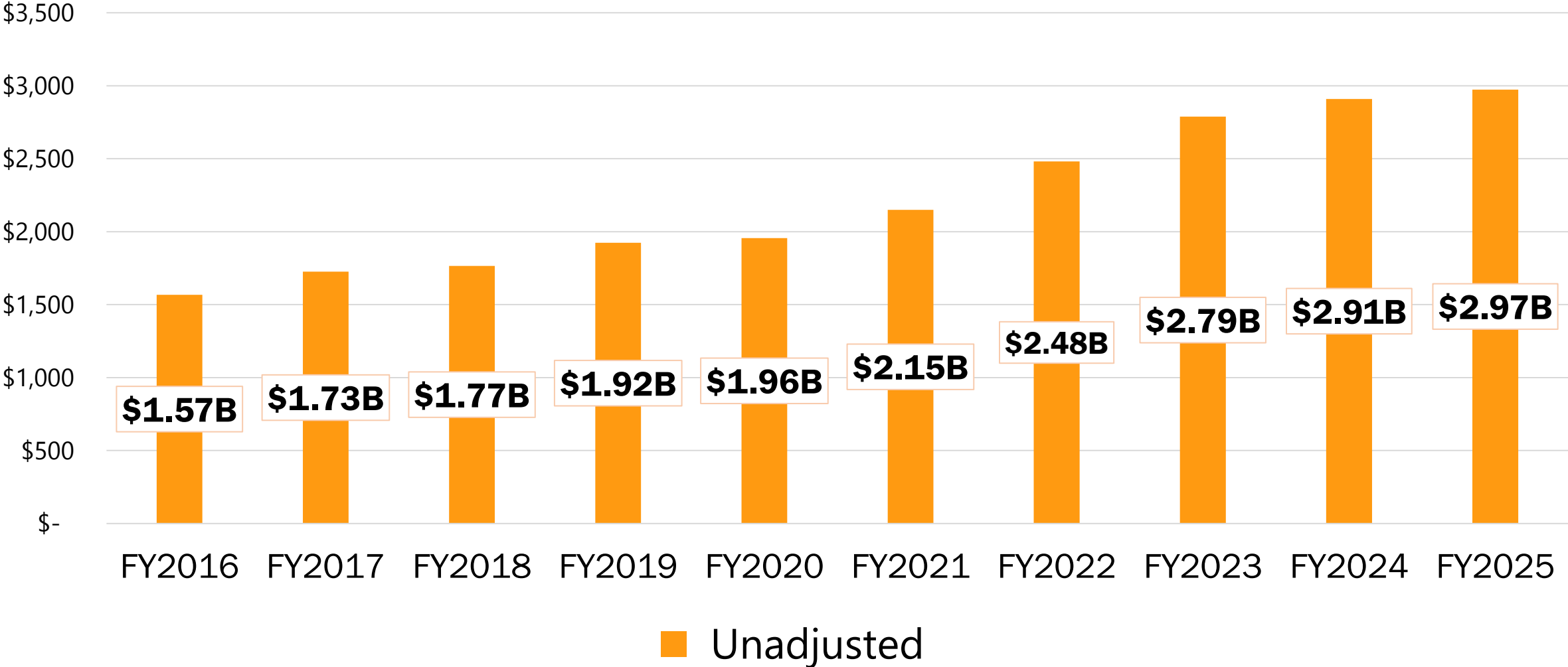


Source: Local Area Unemployment Statistics (LAUS) via NC Department of Commerce

# **Economy: Retail Sales**

# Taxable Retail Sales – Orange County

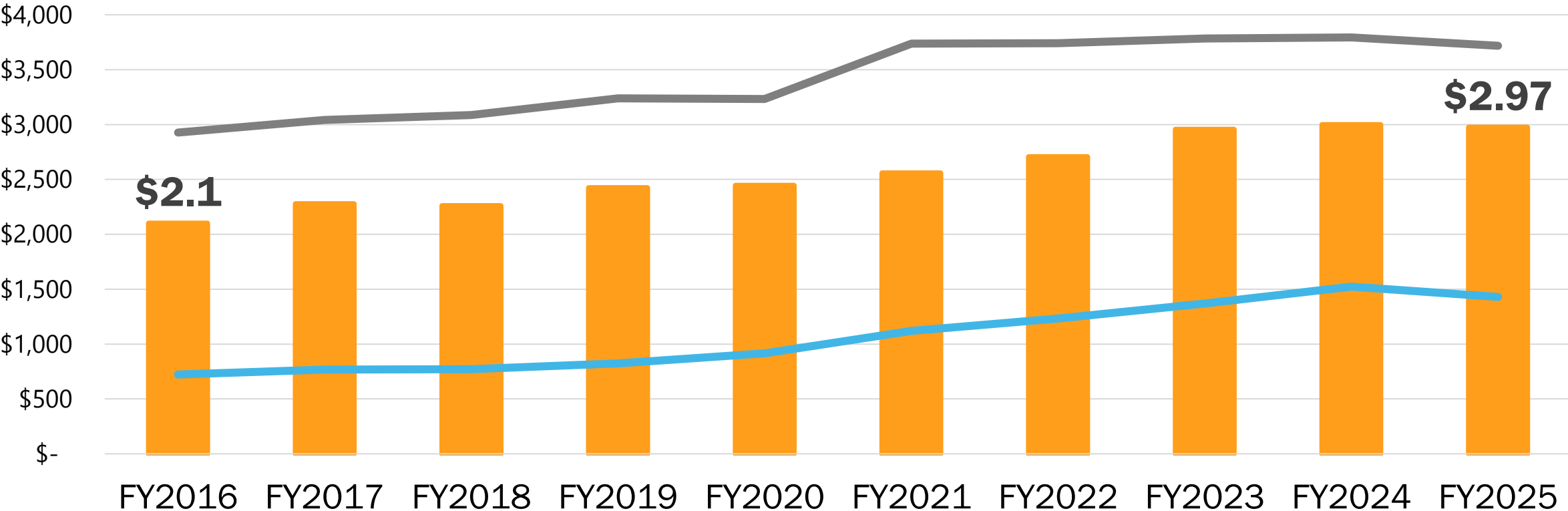
Unadjusted and Inflation Adjusted (\$2025) Orange County taxable sales (\$billions) for FY2016 to FY2025



Source: NC Department of Revenue

# Taxable Sales (in millions), FY2016 to FY2025

Inflation adjusted \$2025

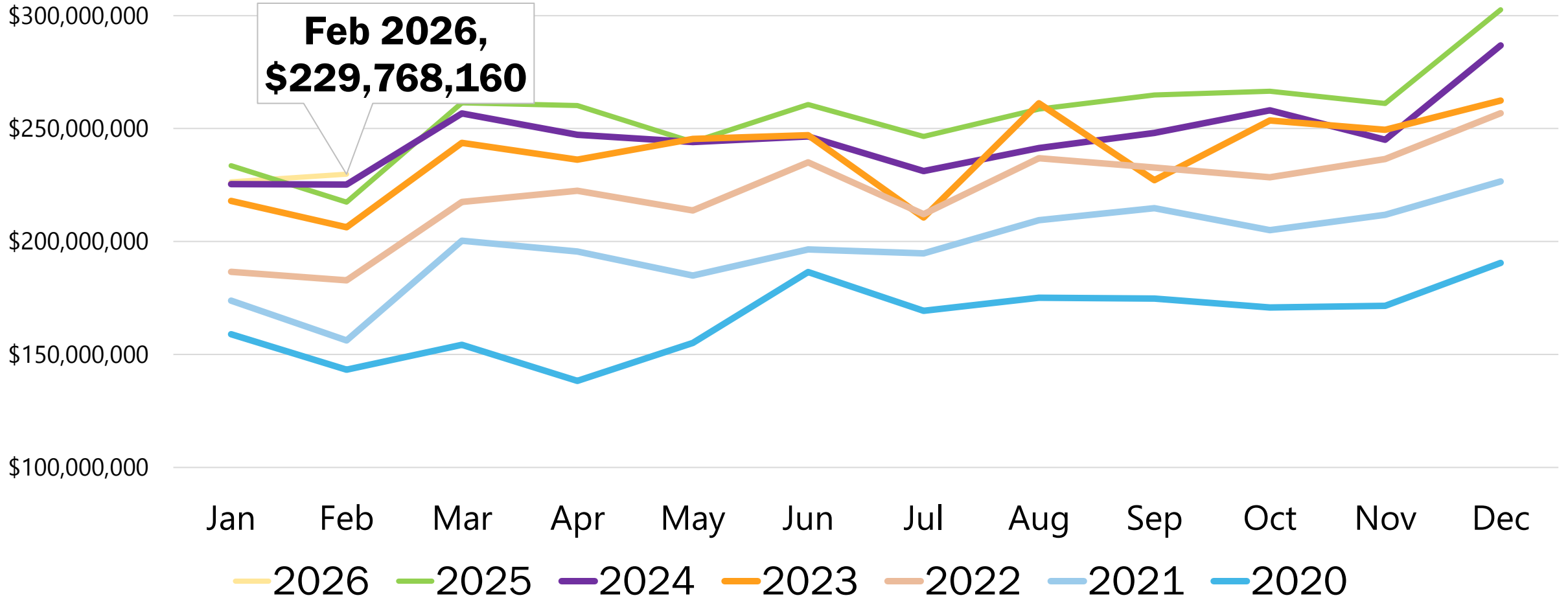


Orange County      Alamance County      Chatham County

Source: NC Department of Revenue

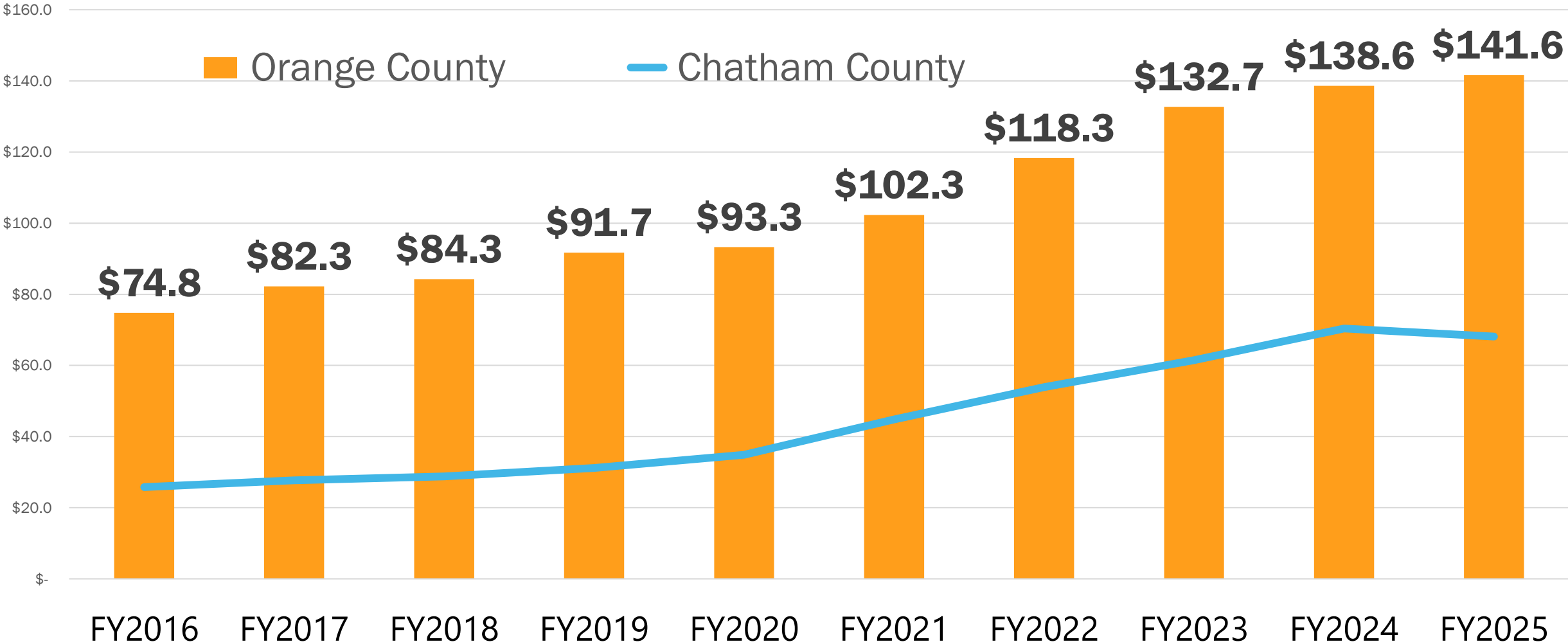
# Orange County Monthly Retail Sales

Taxable retail sales by month, 2020 through Feb 2026



# Sales Tax Collections: Orange County

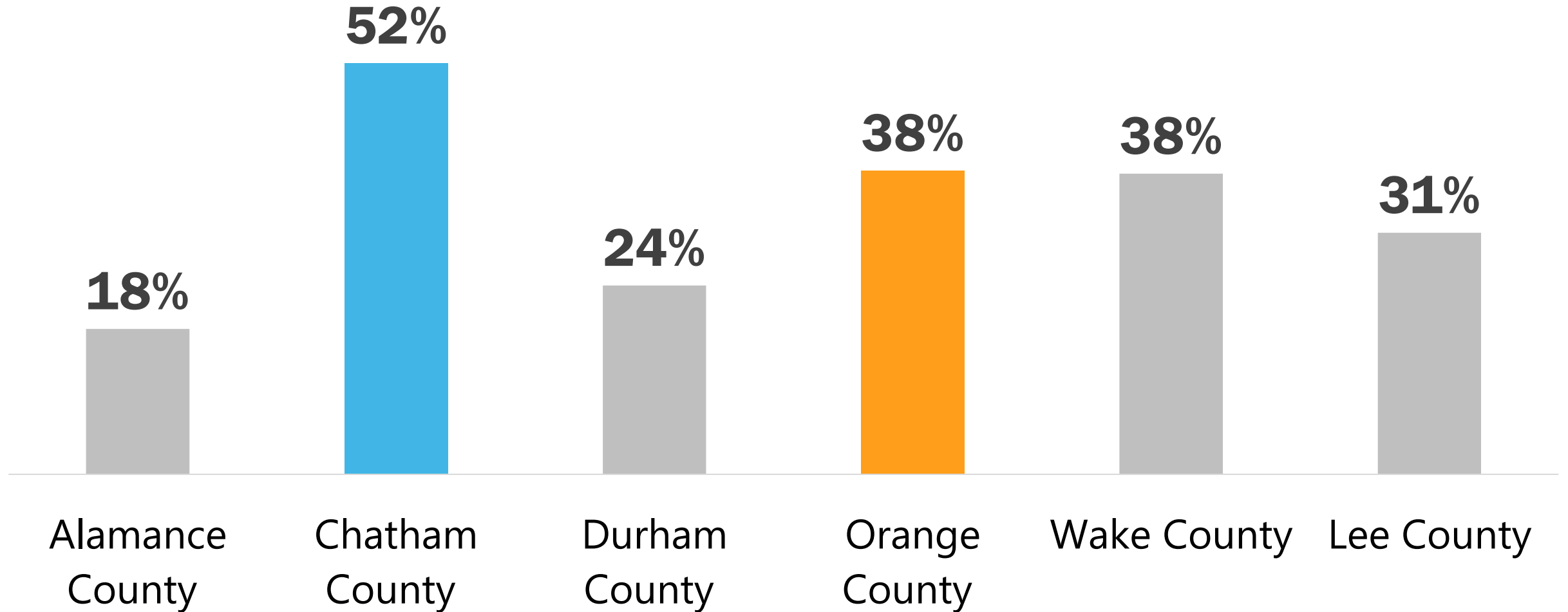
Orange County sales tax collections (in millions), FY2016 to FY2025



Source: NC Department of Revenue

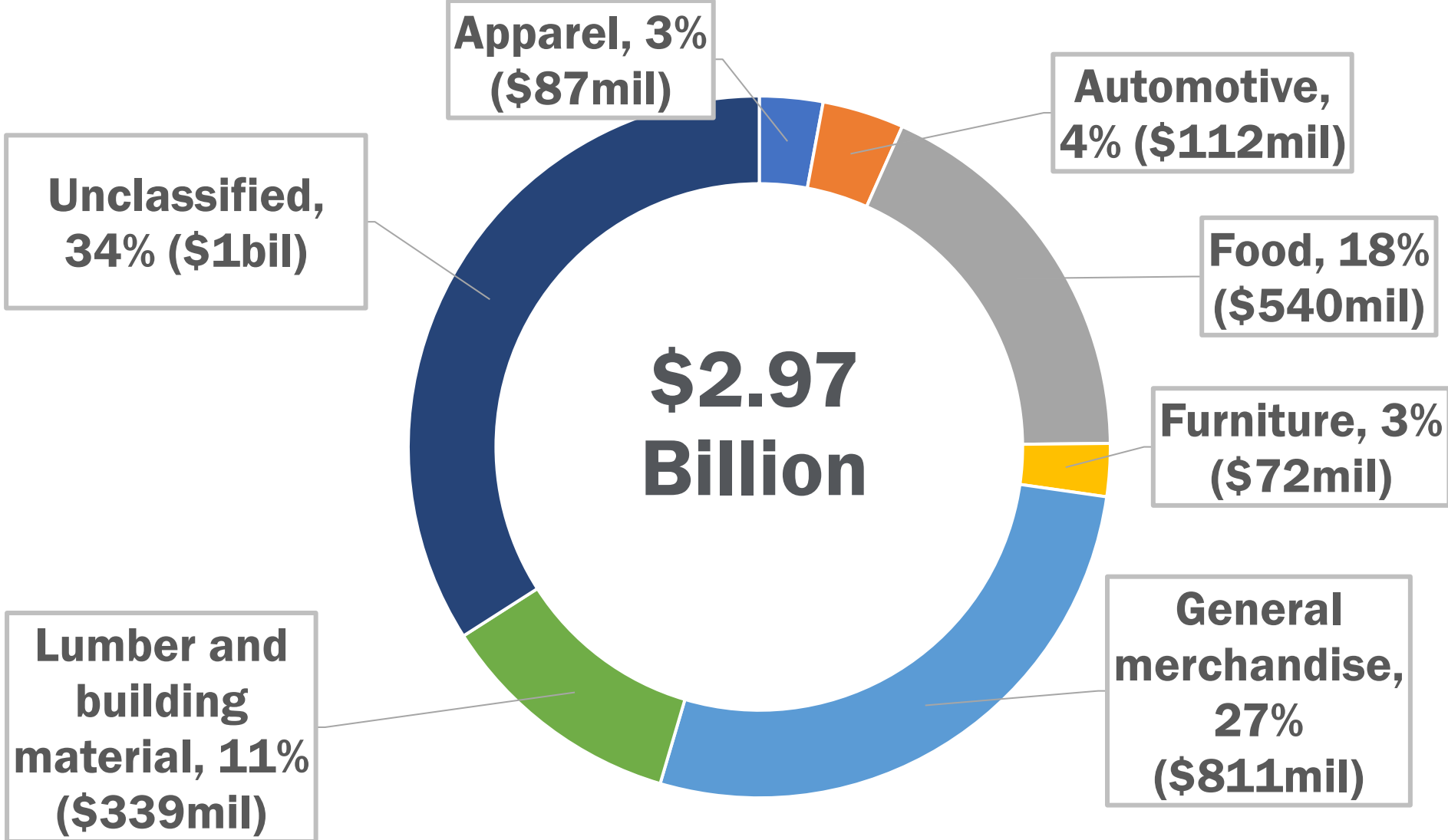
# Post-Pandemic Gross Sales Tax Collection Change

FY2021 to FY2025



# Taxable Sales and Purchases: Orange County

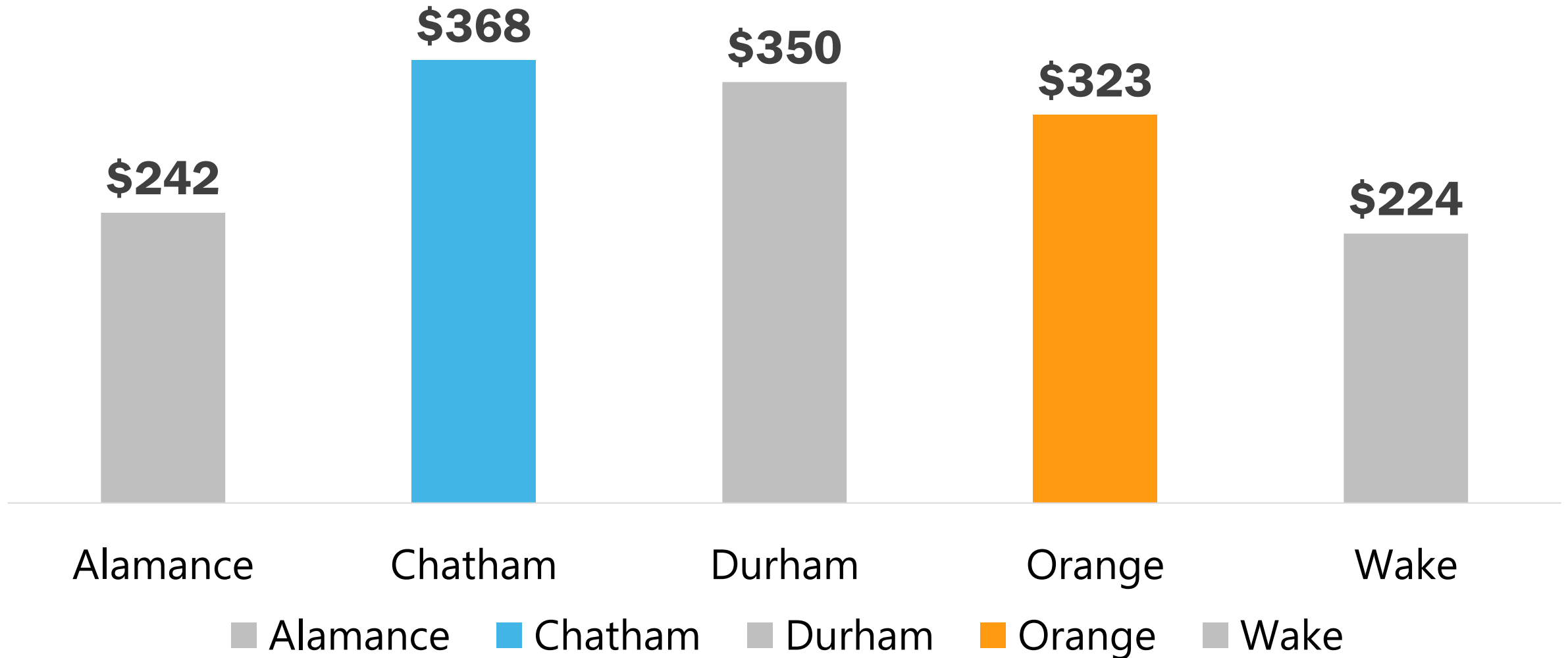
Orange County taxable sales and purchases by major business category, FY2025



Source: NC Department of Revenue

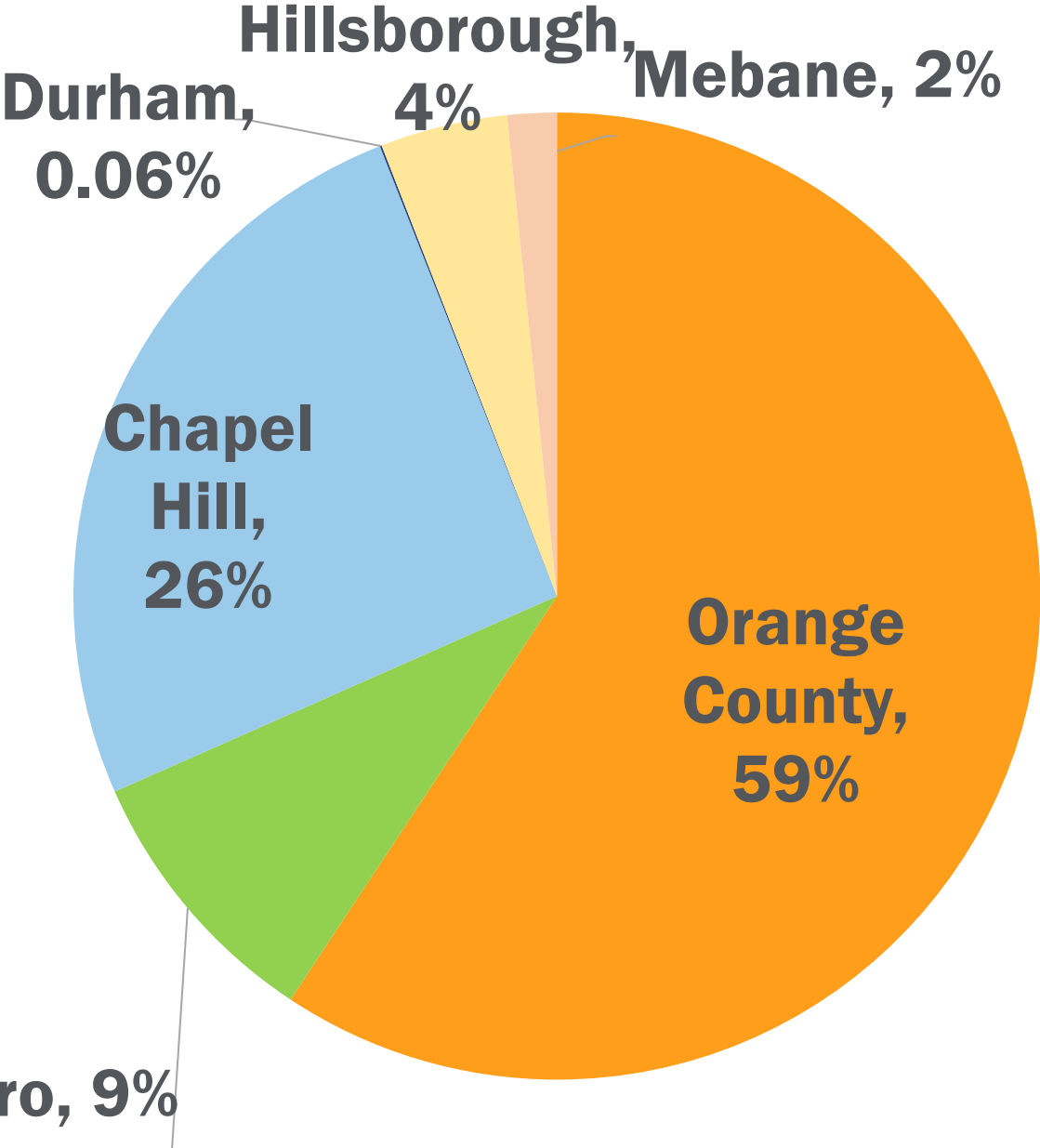
# County Sales Tax Per Capita, FY2021 vs. FY2025

Sales tax per capita is the average amount of sales tax revenue a government receives for each resident.



# Orange County Local Sales and Use Tax Distribution (\$79,263,565)

How Orange County's Local Sales and Use Tax is distributed to the county & among its municipalities, FY2025

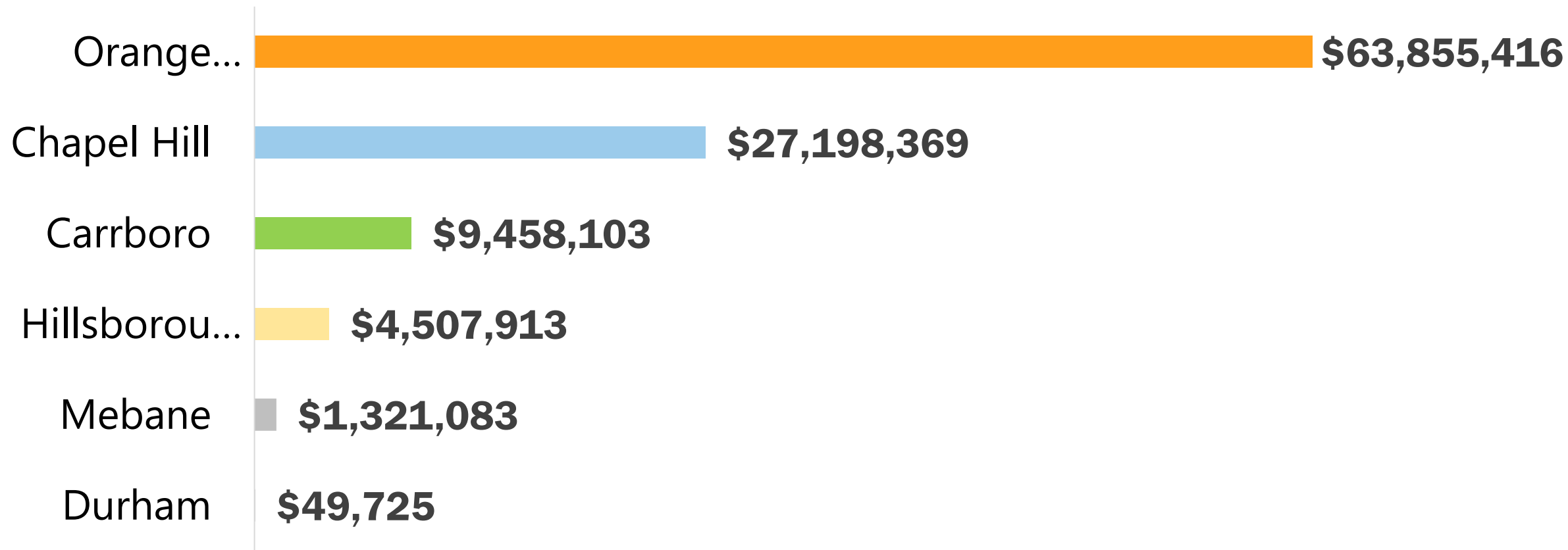


“Local Sales and Use Tax” includes Articles 39, 40, 42, 43, 44, 45 and 46 sales taxes.

Source: NC Department of Revenue

# Orange County All Sales Tax Distribution (millions)

Orange County “All Sales Tax” distribution to county and its municipalities, FY2025

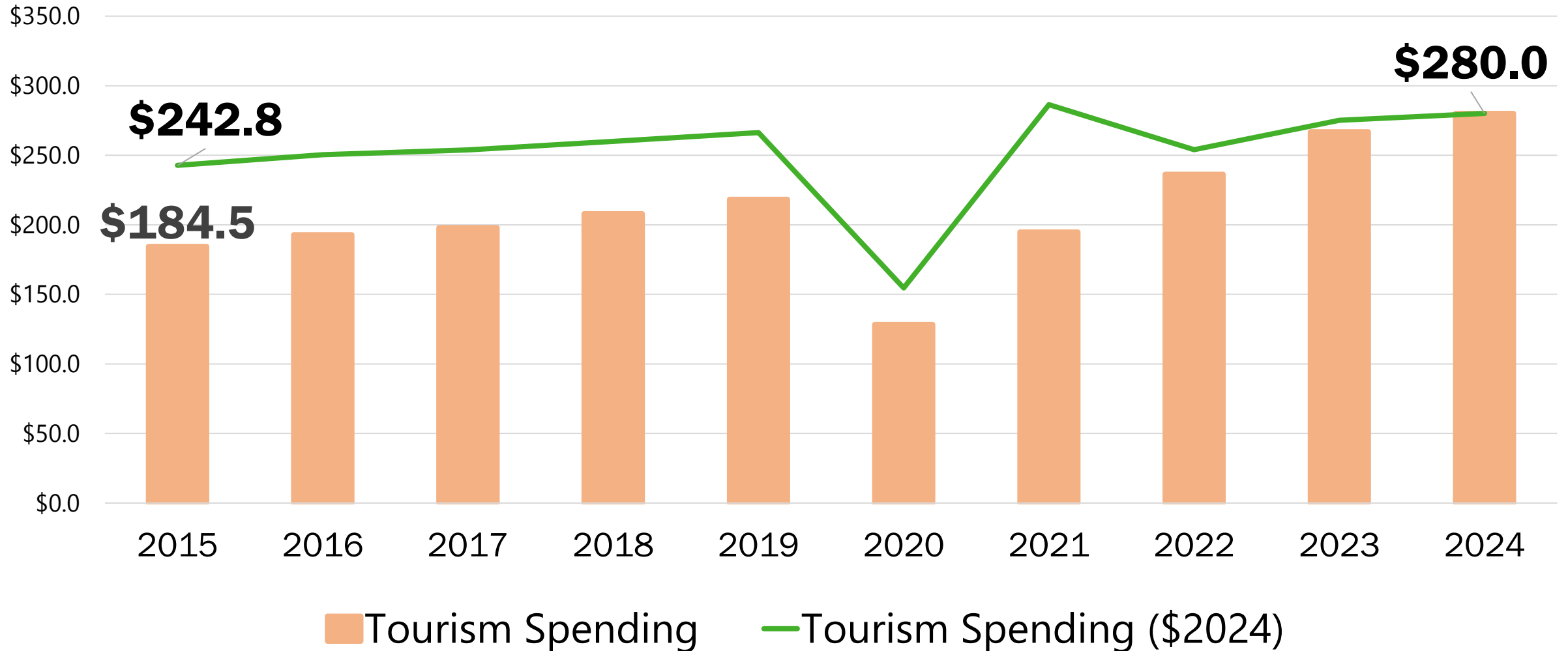


“All Sales Tax” includes Local Sales and Use tax plus sales tax on tire disposal, white good disposal, electricity, piped natural gas, telecommunications, beer and wine excise, video programming, and solid waste disposal

# **Economy: Tourism**

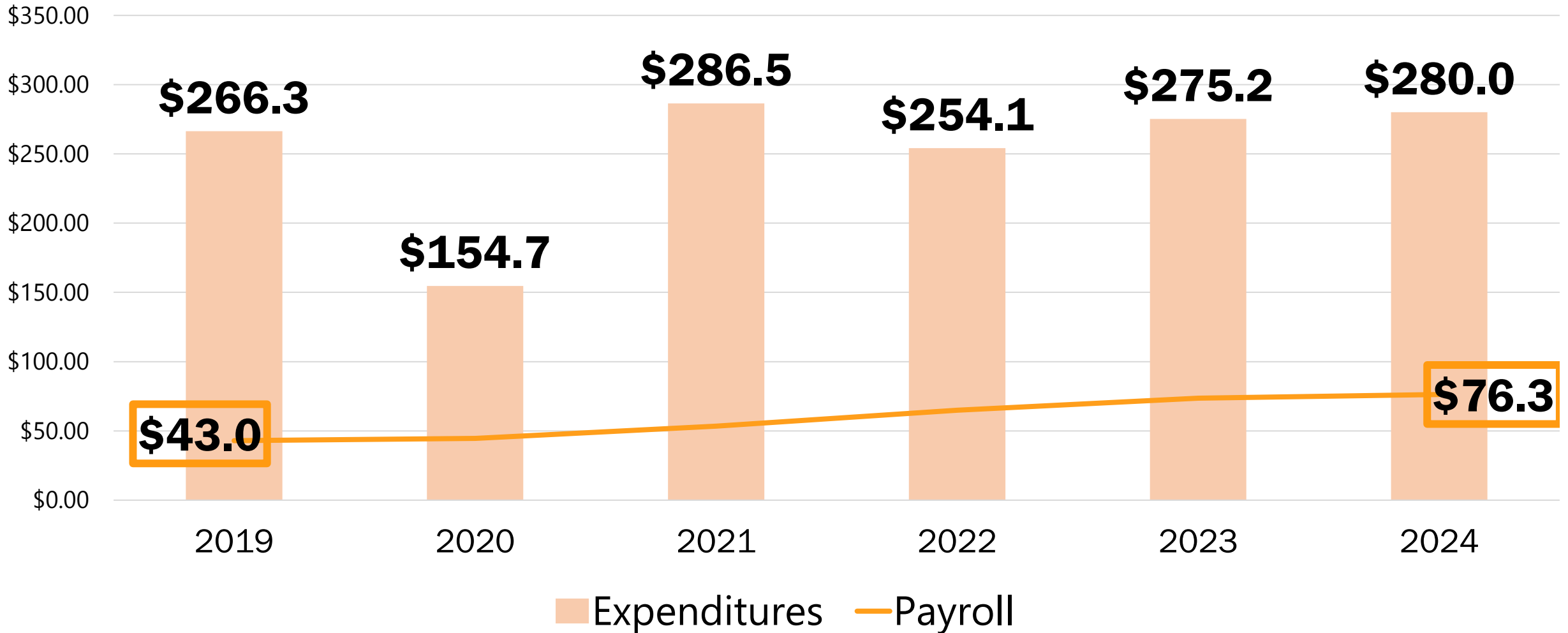
# Orange County Annual Tourism Spending, 2015 to 2024

In millions; unadjusted and adjusted \$2024



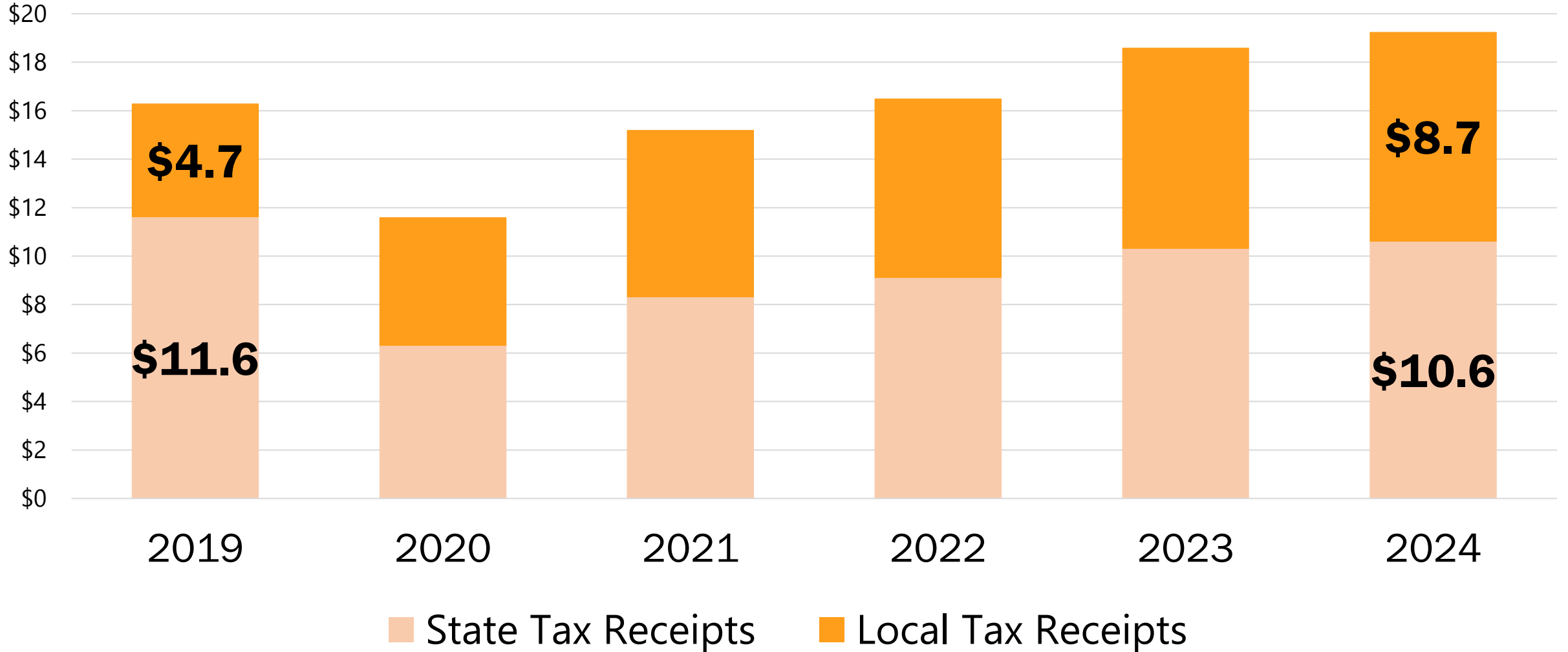
# Orange County Tourism Spending & Labor Payroll

In millions, inflation adjusted \$2024



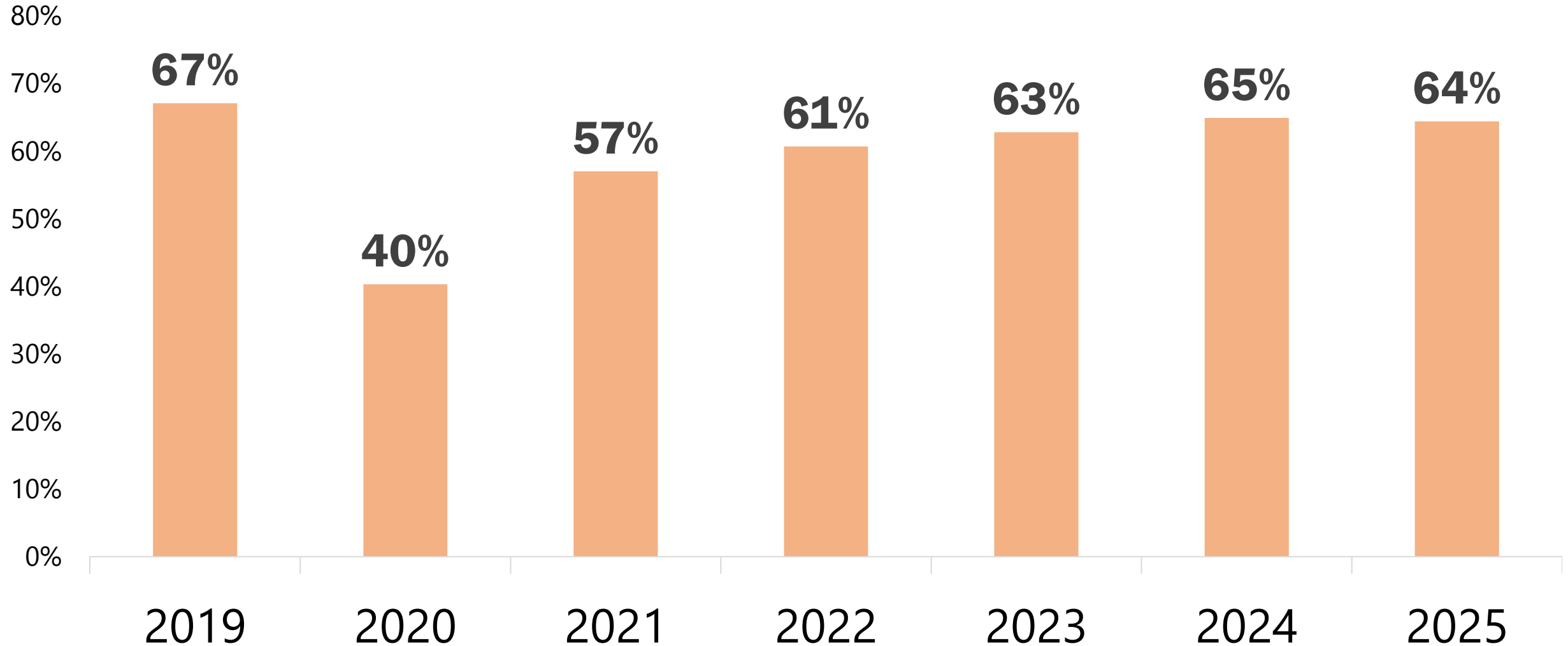
# Orange County Tourism-Produced Tax Revenue

State and local tax receipts, in millions (unadjusted)



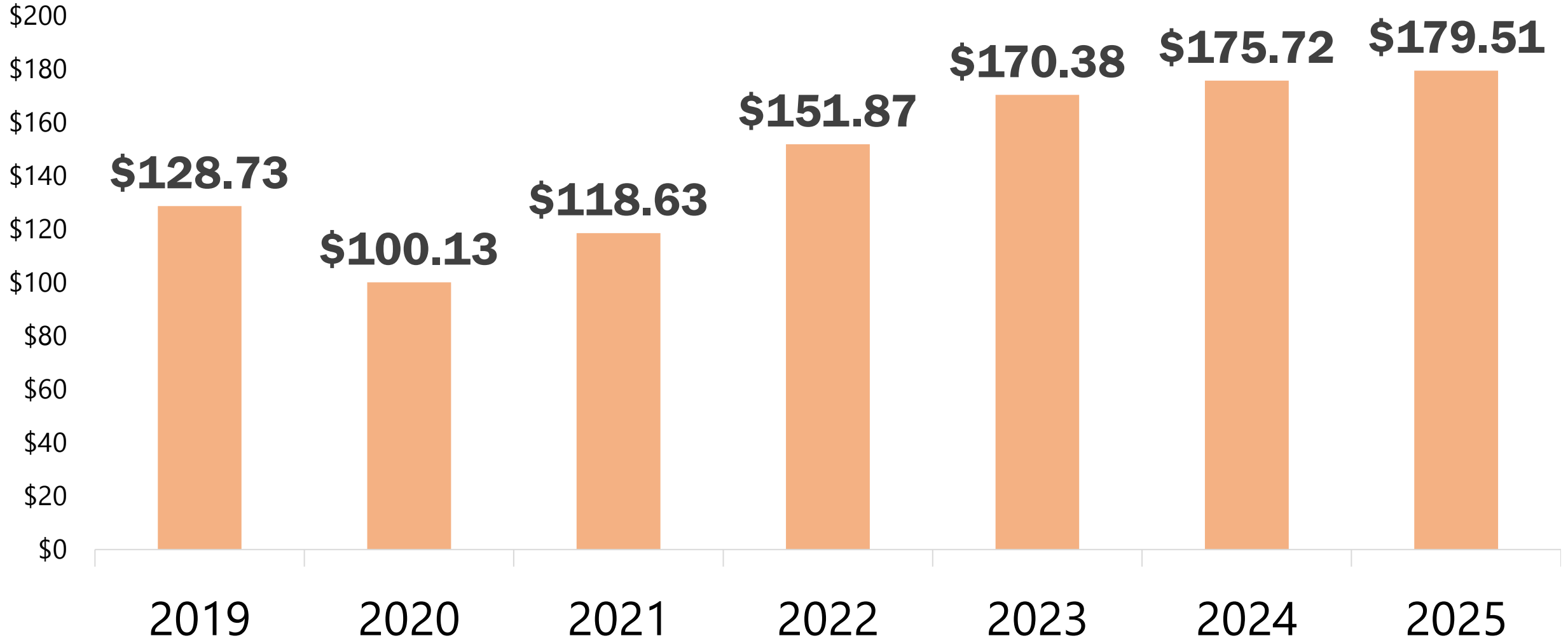
# Orange County Hotel Occupancy

County average daily occupancy, 2019 to 2025



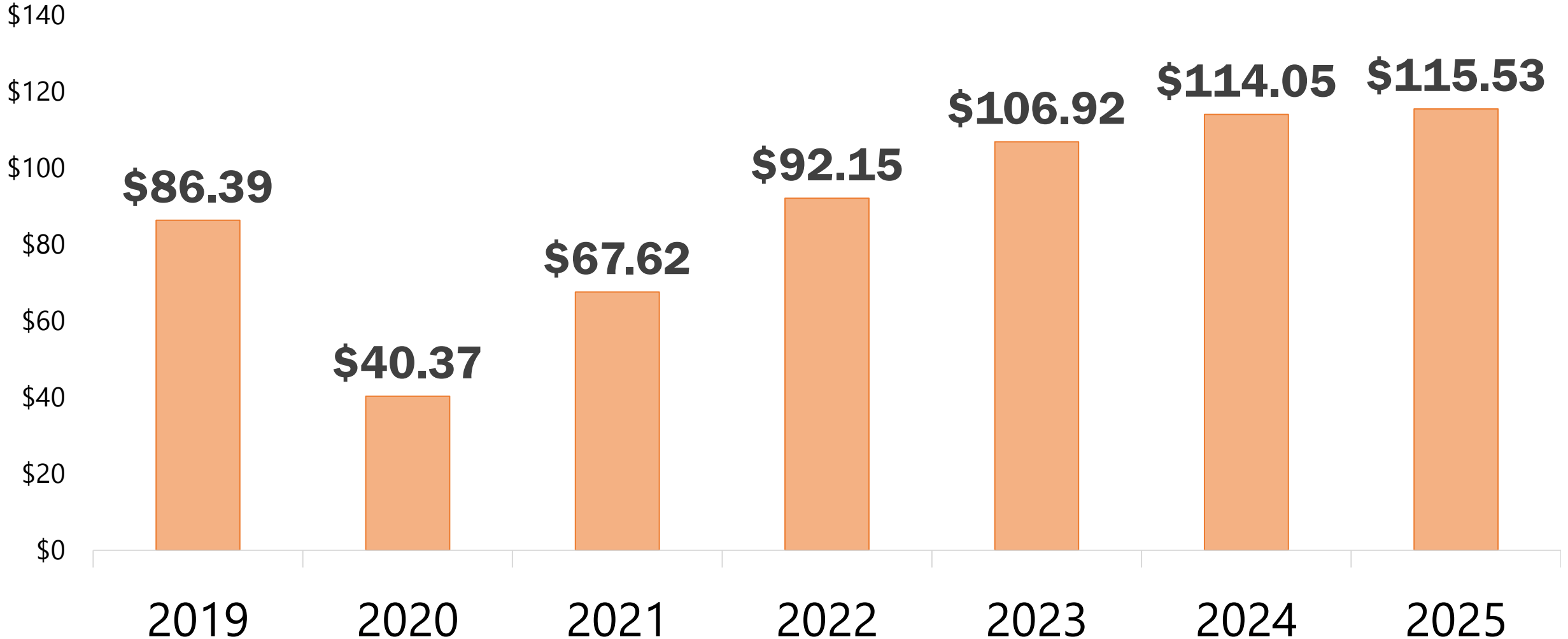
# Orange County Hotels Average Daily Rate

County average daily hotel room rate, 2019 to 2025



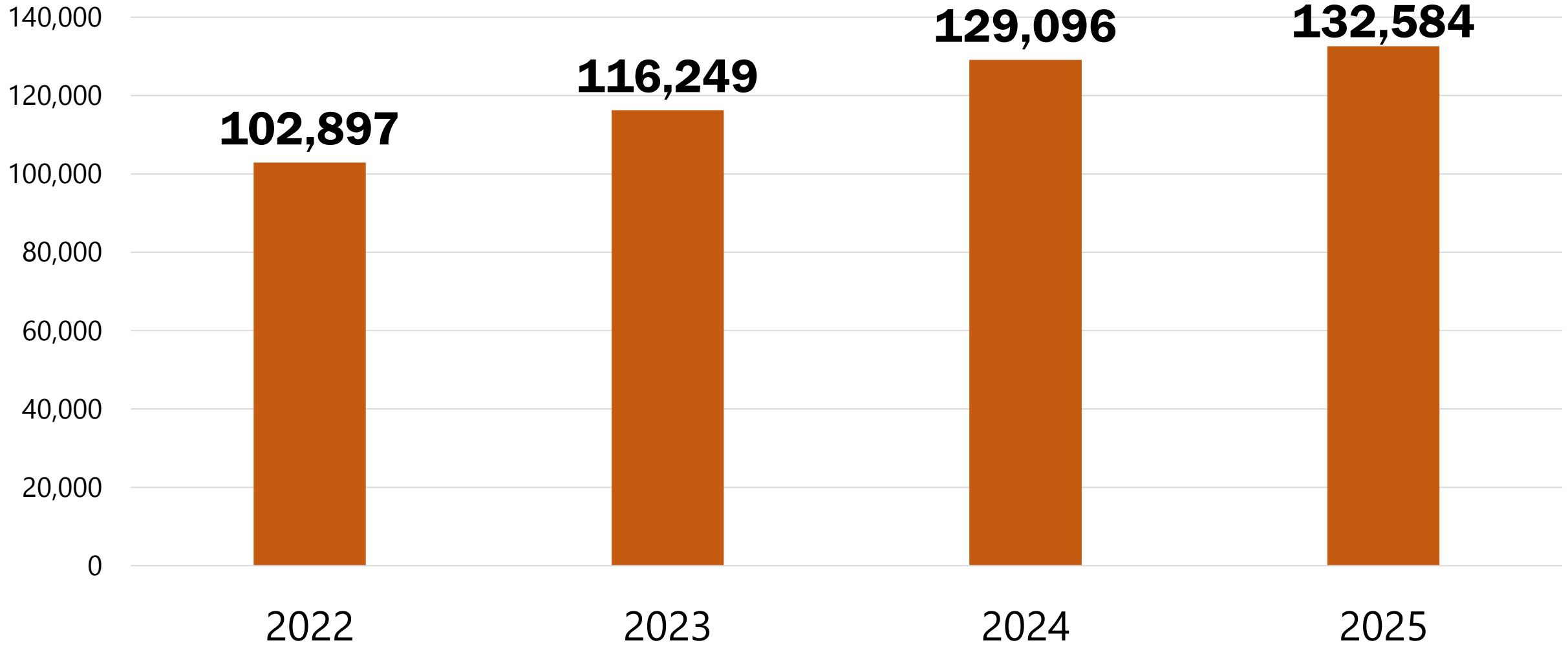
# Orange County Revenue Per Available Room (RevPAR)

County average revenue per available room, 2019 to 2025



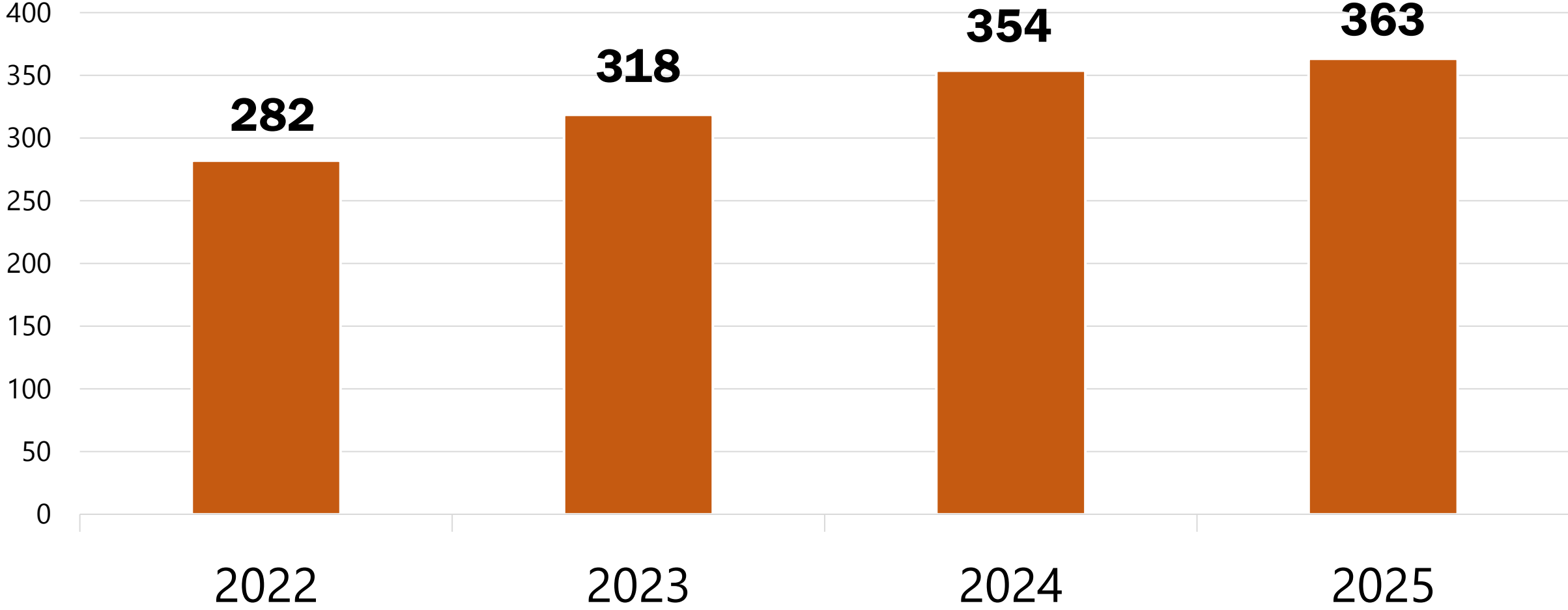
# Orange County Average Annual Short-Term Rental Supply

Room nights available per year



Source: Chapel Hill/Orange County Visitors Bureau

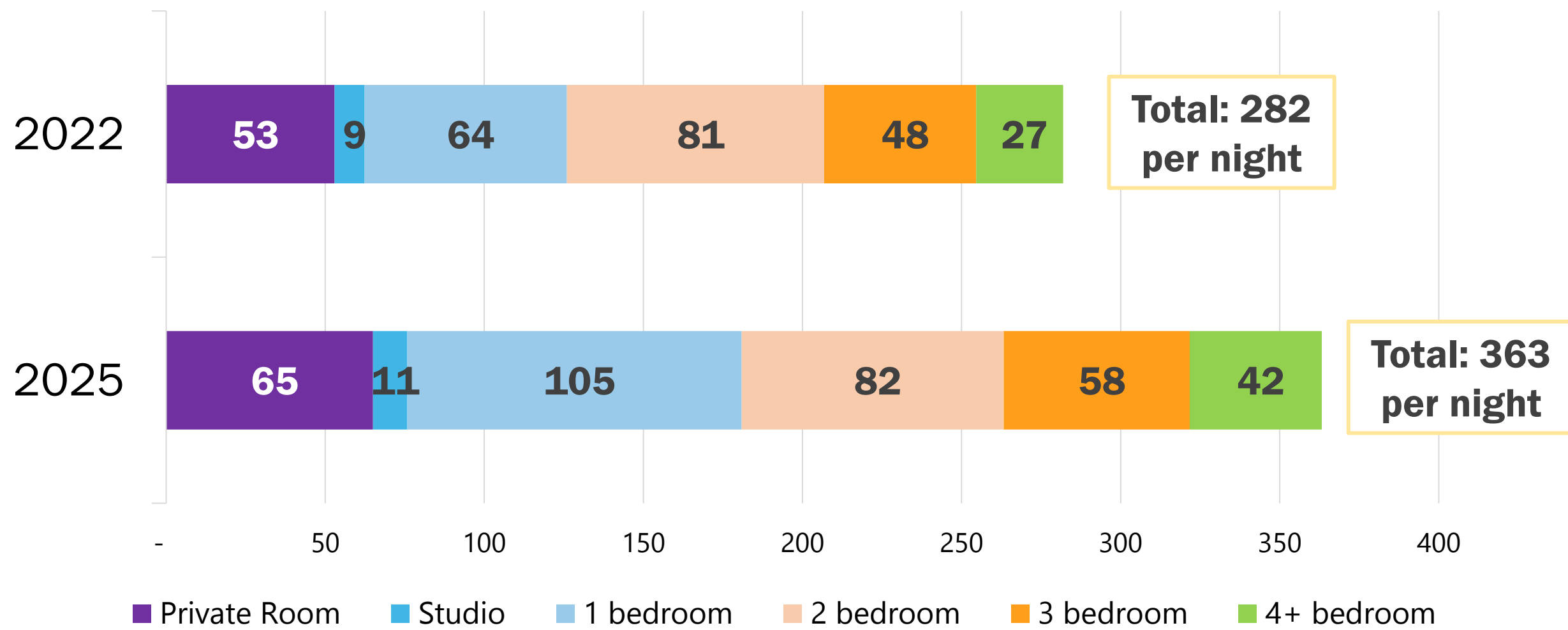
# Average Short-Term Rentals Available Per Night



Source: Chapel Hill/Orange County Visitors Bureau

# Average Daily Short-Term Rental Nights Available by Rental Size: 2022 v 2025

Average daily availability is determined by dividing annual room nights by 365



Source: Chapel Hill/Orange County Visitors Bureau



# Savannah Bananas

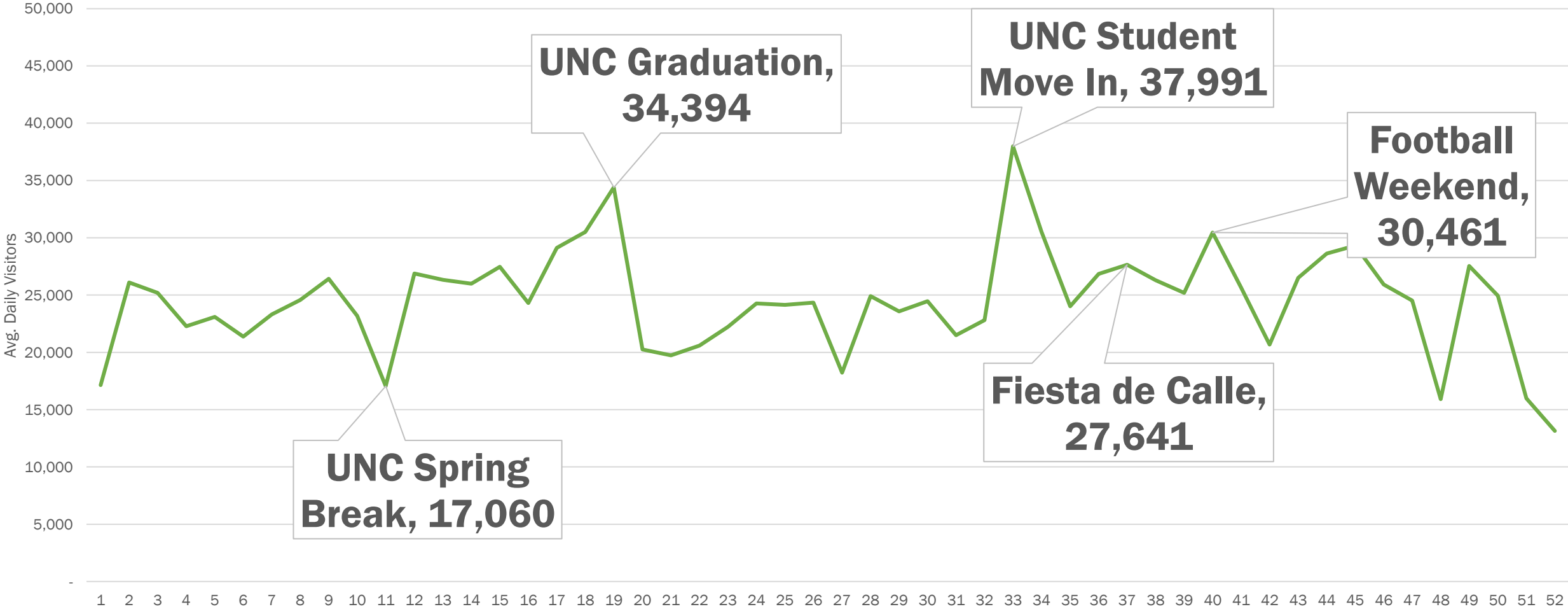
April 2026



- 88,000 visitors
- Over **30,000 travelers** traveled more than 30 miles to attend the games, from **36 states**.
- -\$17 million in direct spending impact



# Average Daily Downtown Foot Traffic By Week

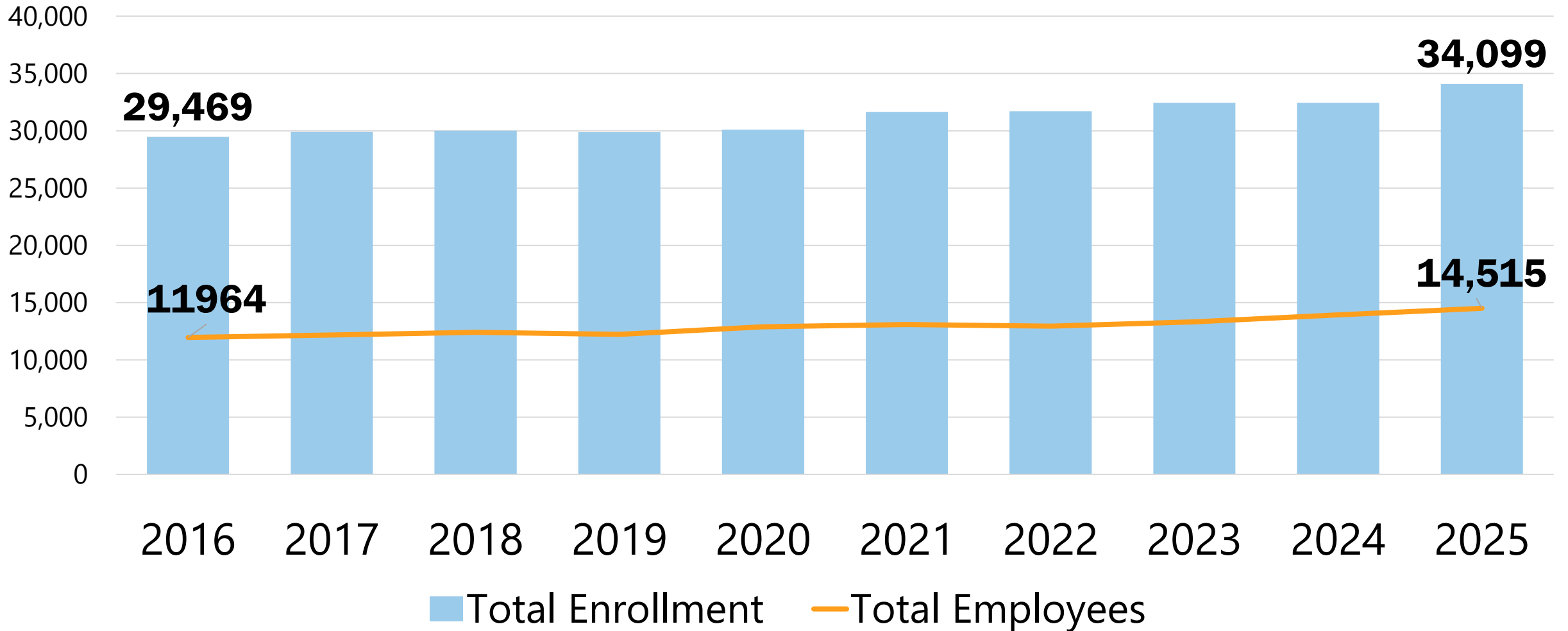


# **Economy: Size and Scope**

**UNC Chapel Hill**

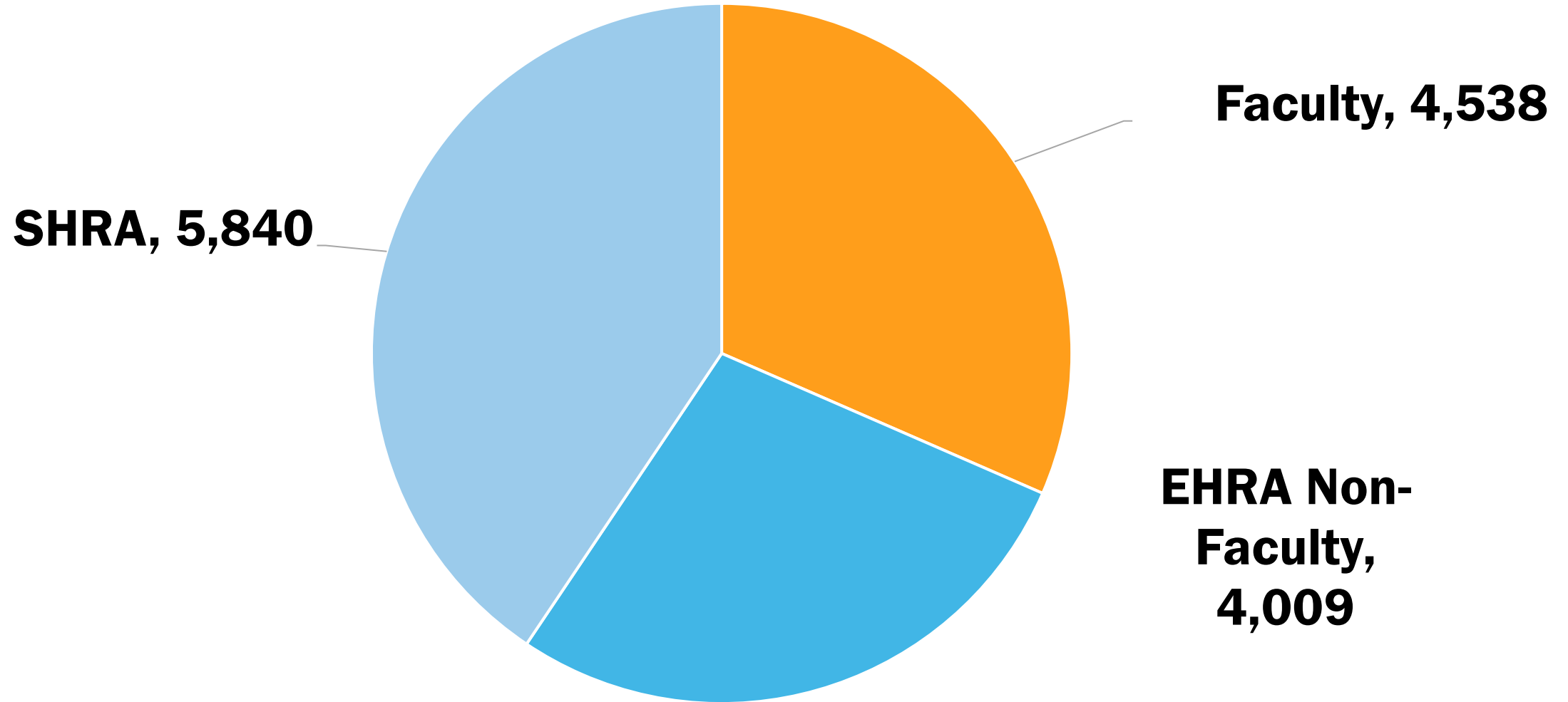
# UNC Chapel Hill Total Enrollment & Employee Count

2016 - 2025



# UNC Chapel Hill's 14,387 Employees by Classification

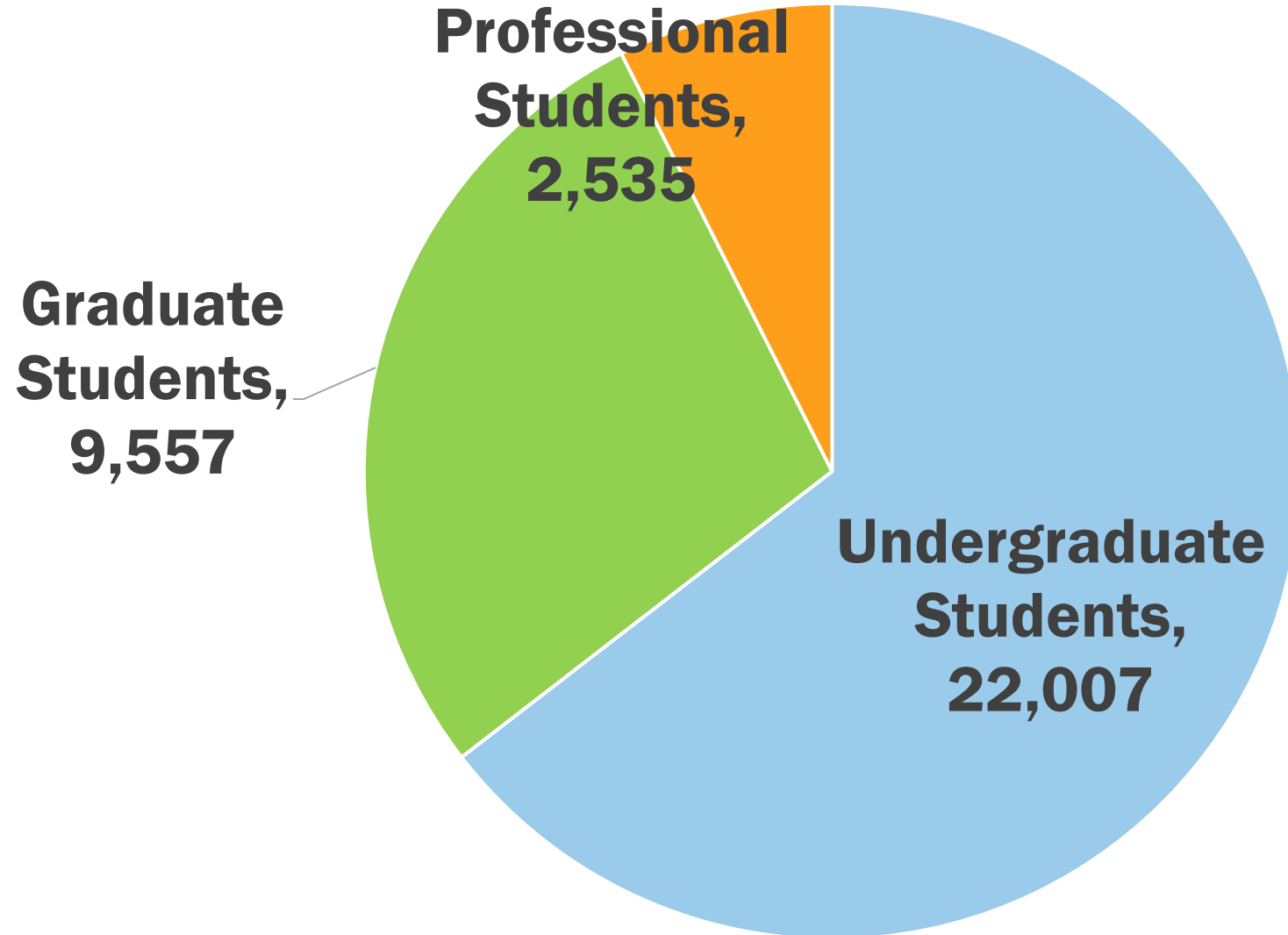
(FY2025) SHRA employees are Subject to the NC Human Resources Act and EHRA are Exempt from the Human Resources Act



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

# UNC Chapel Hill's 34,099 Students by Education Level

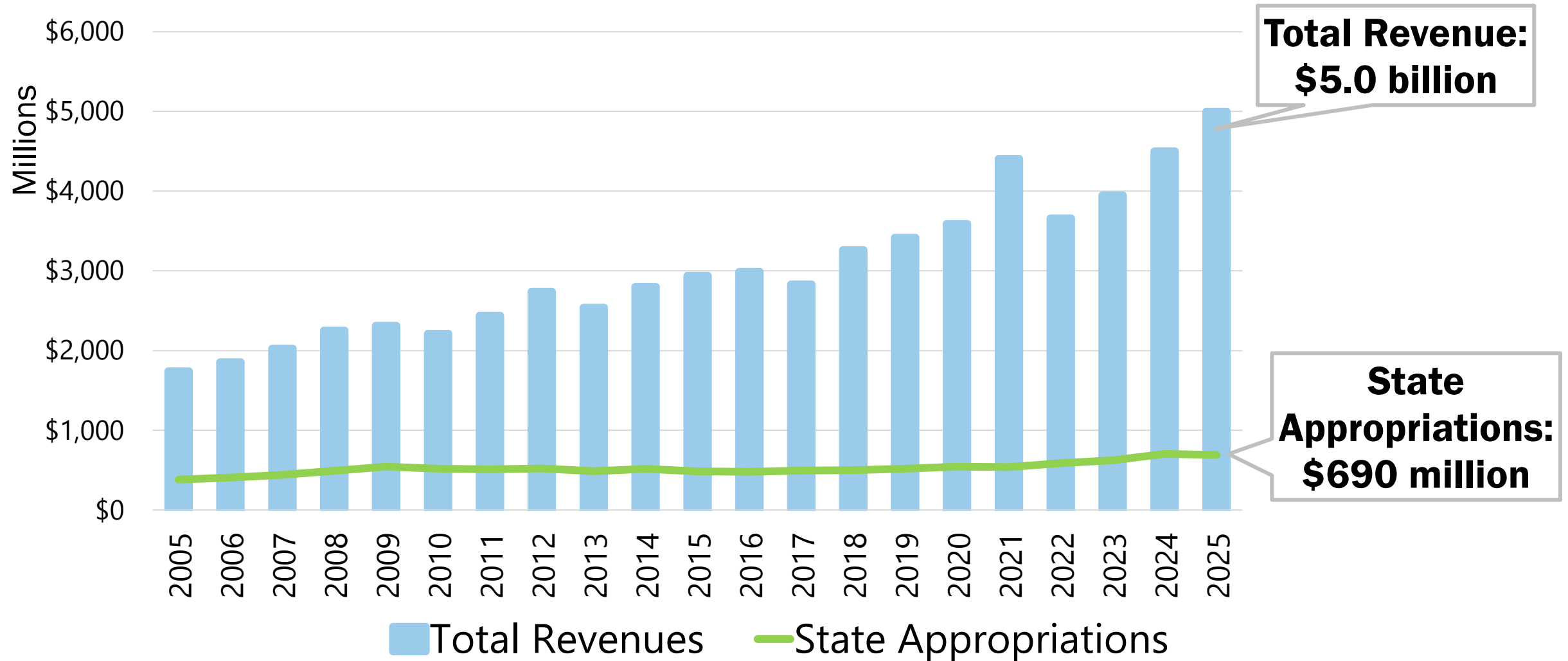
Fall 2025



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

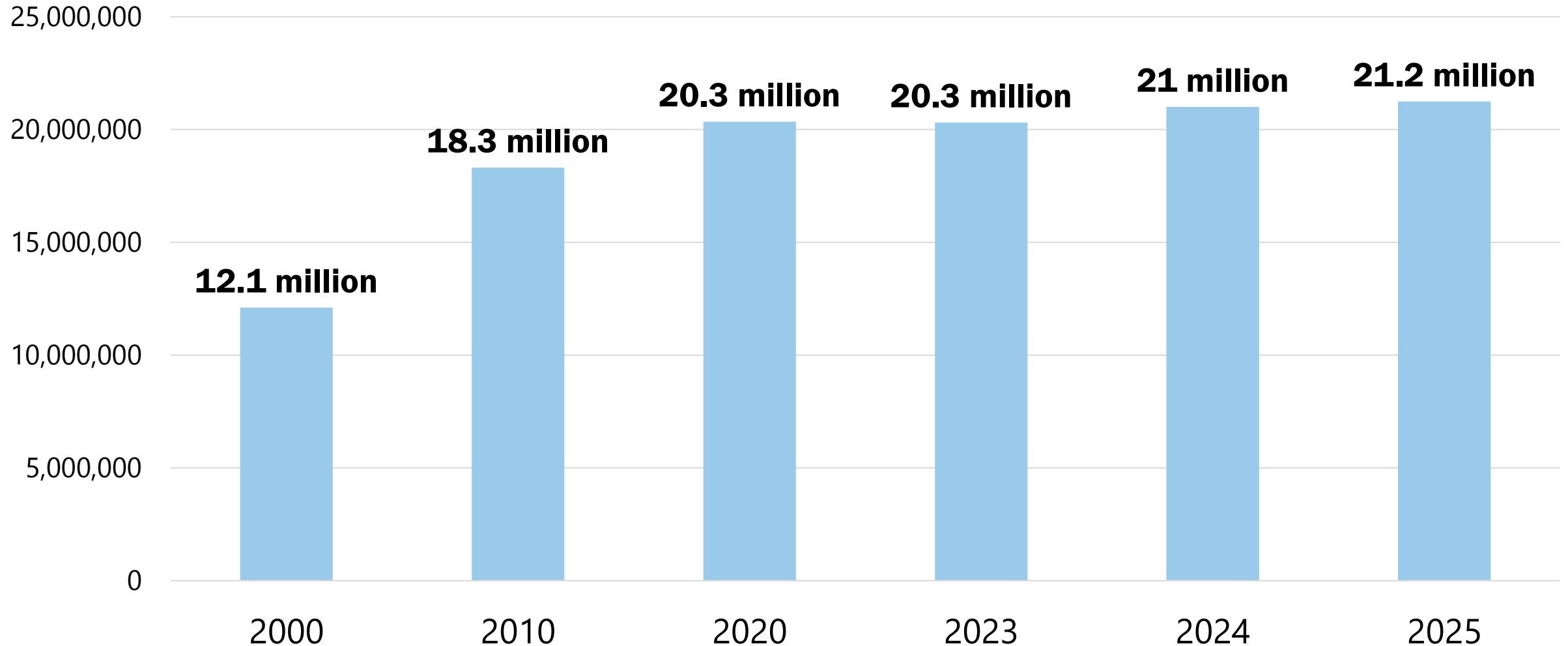
# UNC Chapel Hill Annual Revenues

Total annual operating revenue compared with state appropriations between FY2005 and FY2025



# UNC Chapel Hill Campus Facilities (sq. ft.)

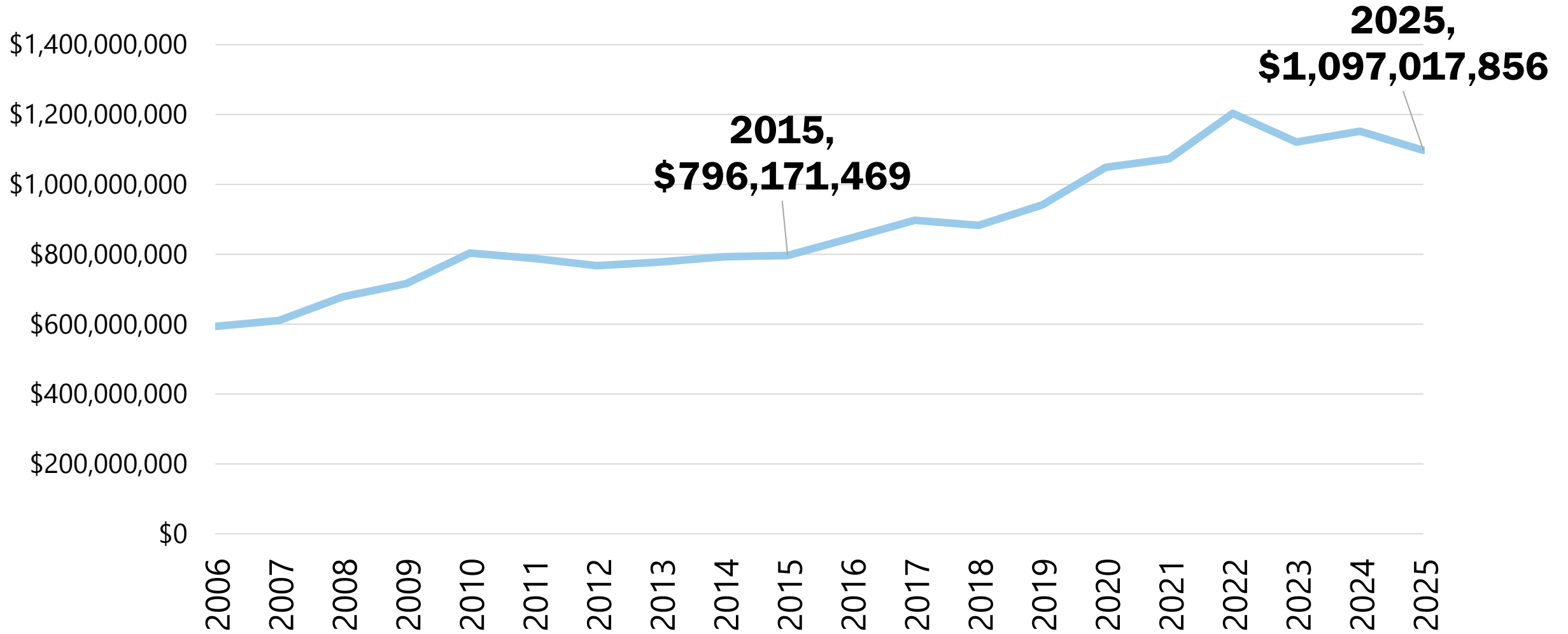
Square footage of UNC Chapel Hill campus facilities 2000, 2010, 2020, 2024, 2025



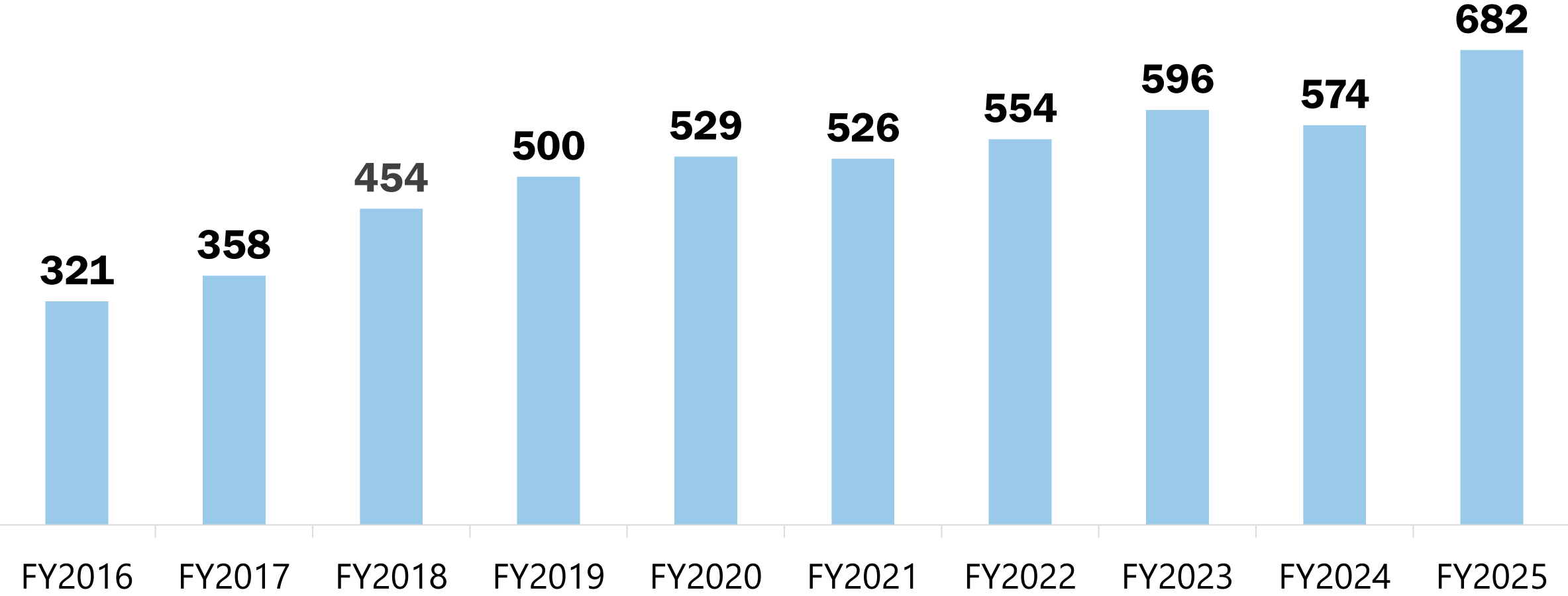
Source: UNC Office of Institutional Research and Analysis (OIRA)

# UNC Chapel Hill Annual Research Funding

2006-2025



# Total Active UNC-Chapel Hill Startups

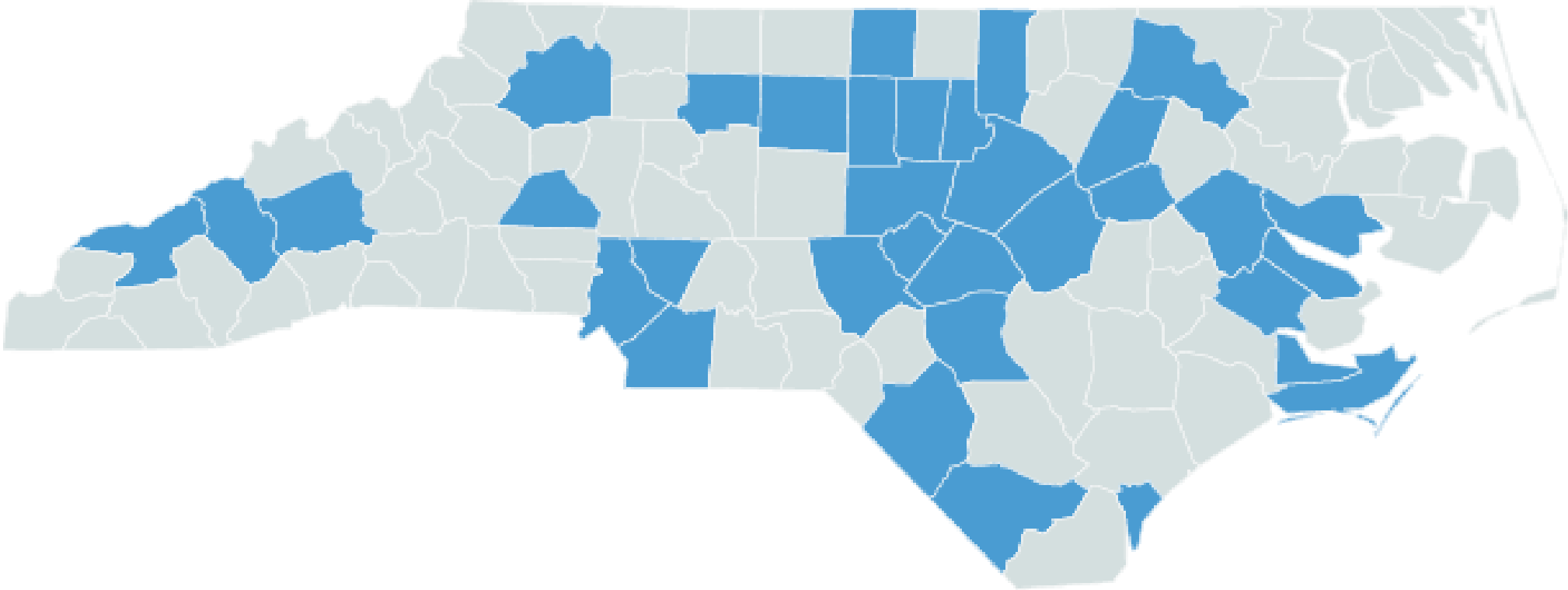


Source: Innovate Carolina

# There Are 537 UNC-Affiliated Startups Headquartered in 32 North Carolina Counties

**81%**

Of revenue earned by UNC-affiliated startups comes from those headquartered in North Carolina.

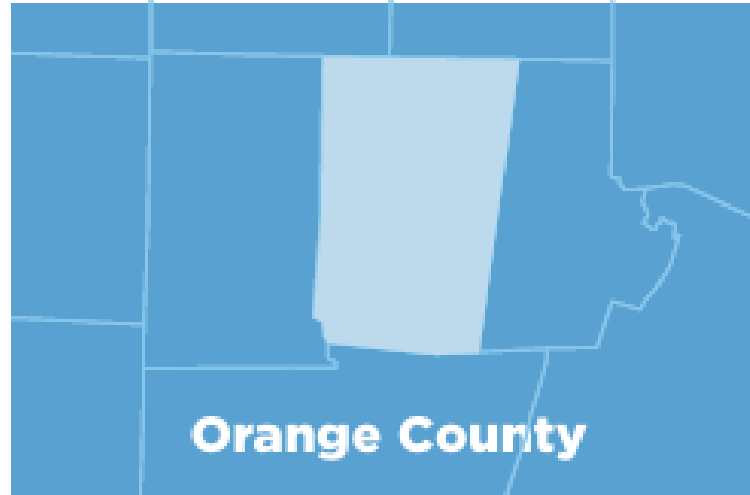


Source: Innovate Carolina

# UNC Startups, Jobs, & Annual Revenue



**537** Active UNC Startups  
**14,530** Jobs  
**\$18.4B** Annual Revenue



**211** Active UNC Startups  
**7,343** Jobs\*  
**\$156.8M** Annual Revenue

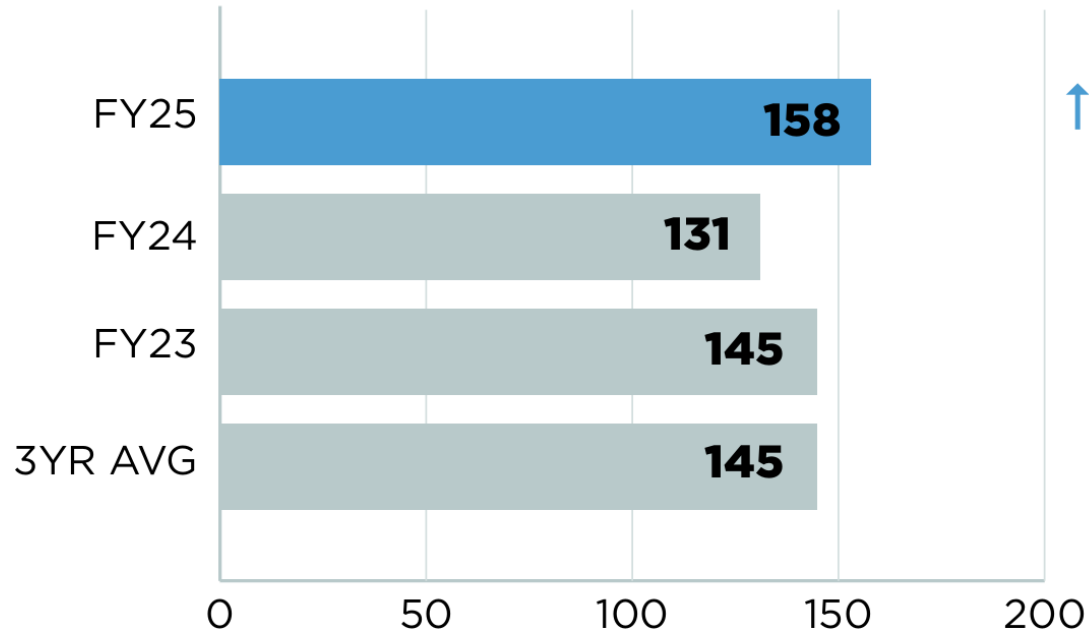


**184** Active UNC Startups  
**6,647** Jobs  
**\$123.3M** Annual Revenue

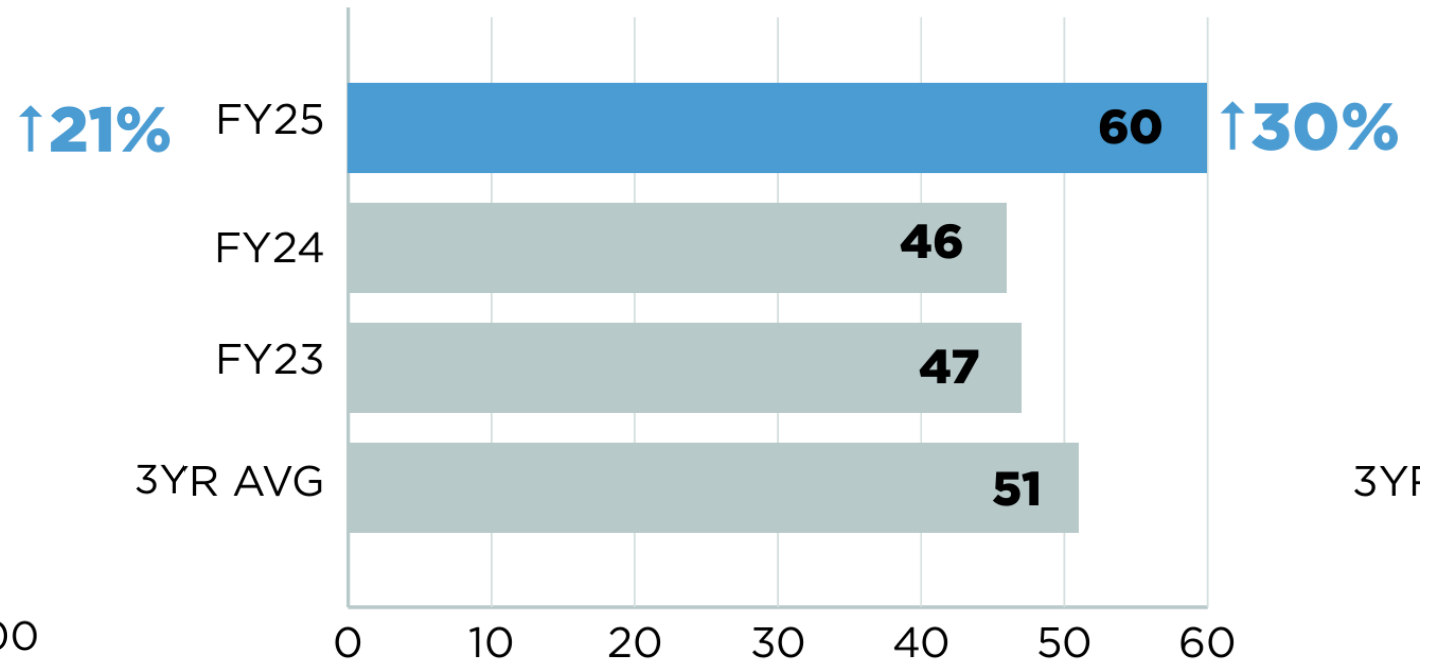
\*People employed in Orange County refer to employees on the payroll of a UNC-affiliated startup with an Orange County-based headquarters, though some of the employees may live or work outside of Orange County

# Carolina Invention Disclosures & Patents Issued

## Invention Disclosures



## Issued U.S. Patents



# UNC Startups' Economic & Employment Impacts on Orange County

FIGURE 9

UNC-Chapel Hill Startups: FY25 Economic Impact on Orange County

**\$712.68 Million**  
Economic Impact on Orange County

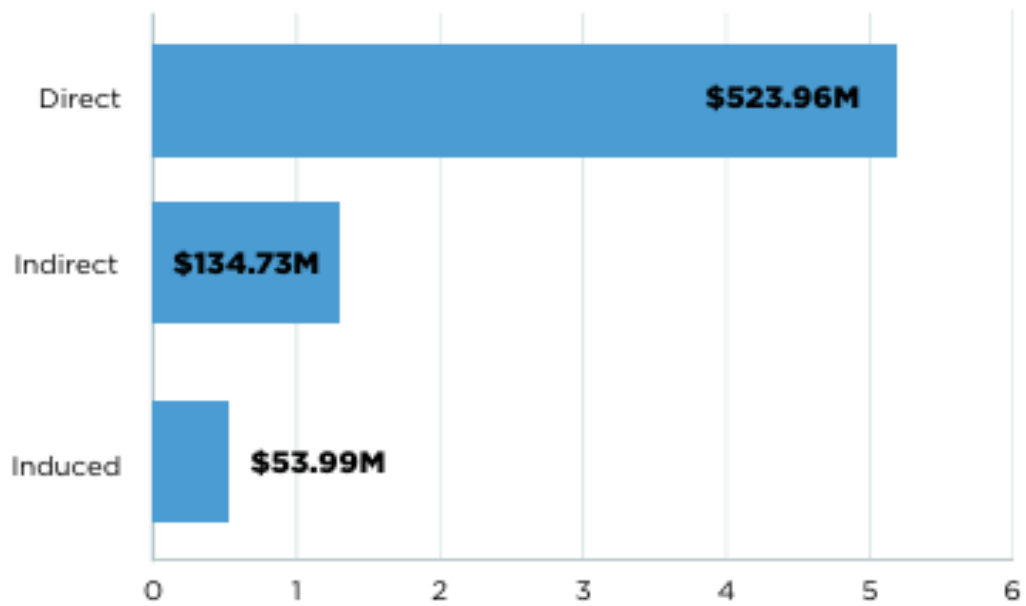
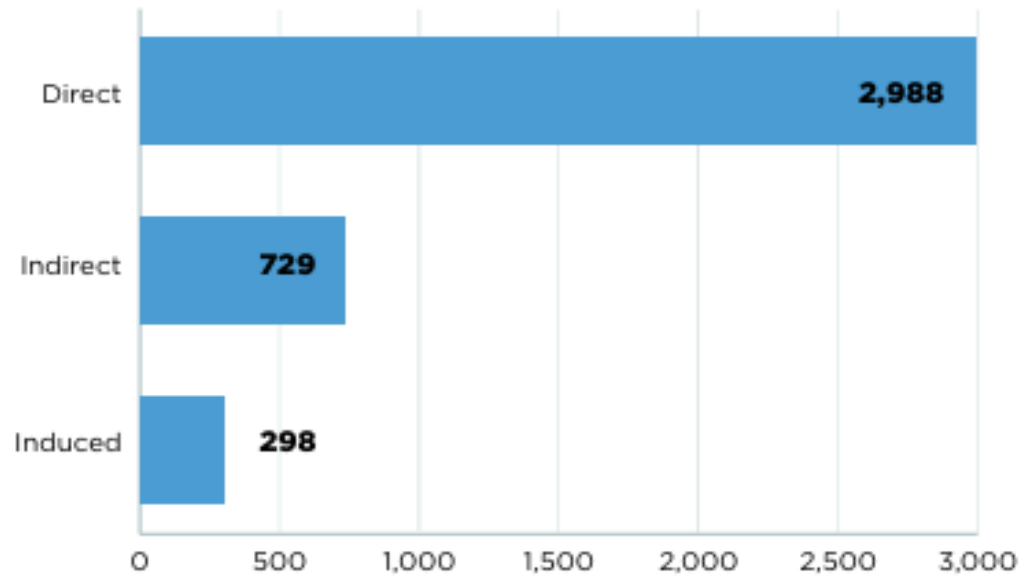


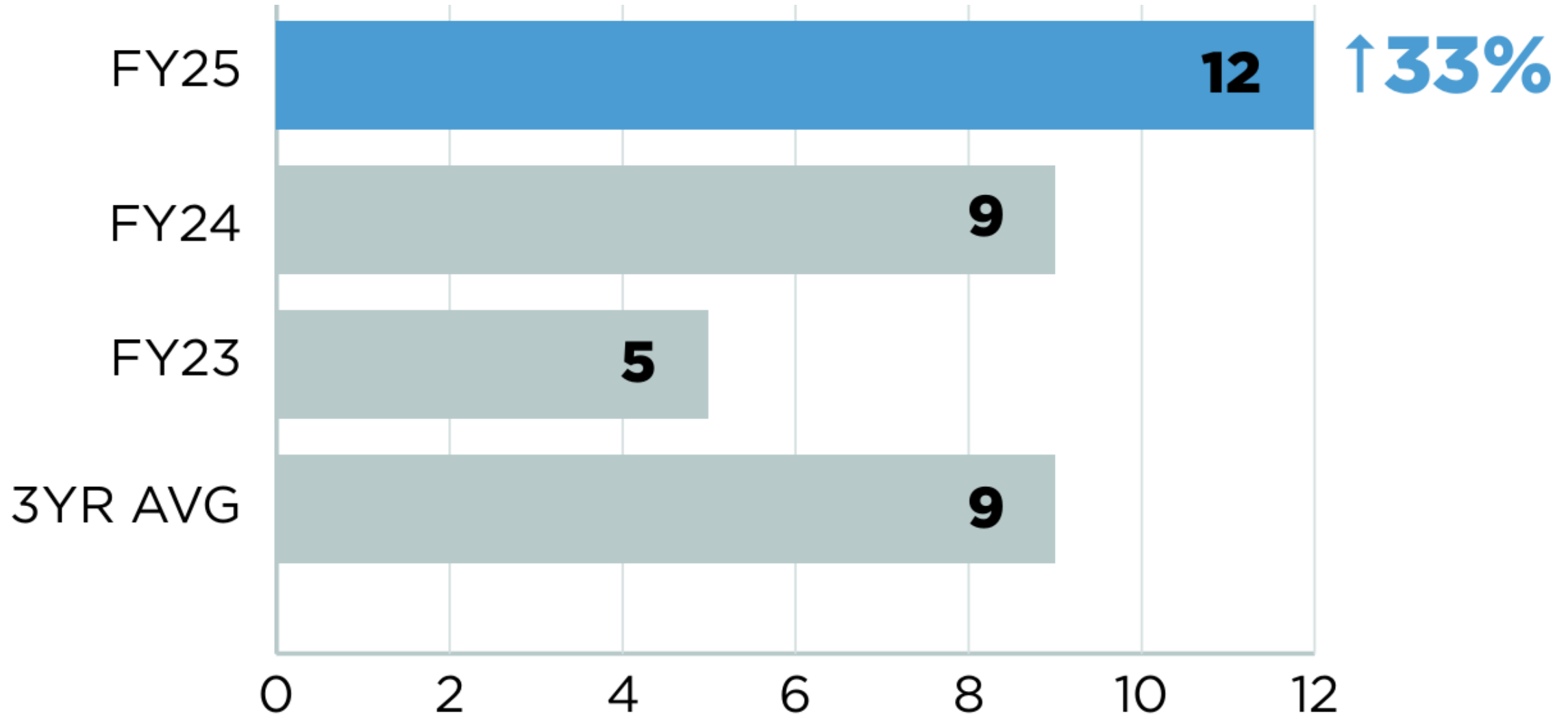
FIGURE 10

UNC-Chapel Hill Startups: FY25 Employment Impact on Orange County

**4,015**  
Jobs Supported in Orange County



# UNC Chapel Hill IP-Based Startups



# Education

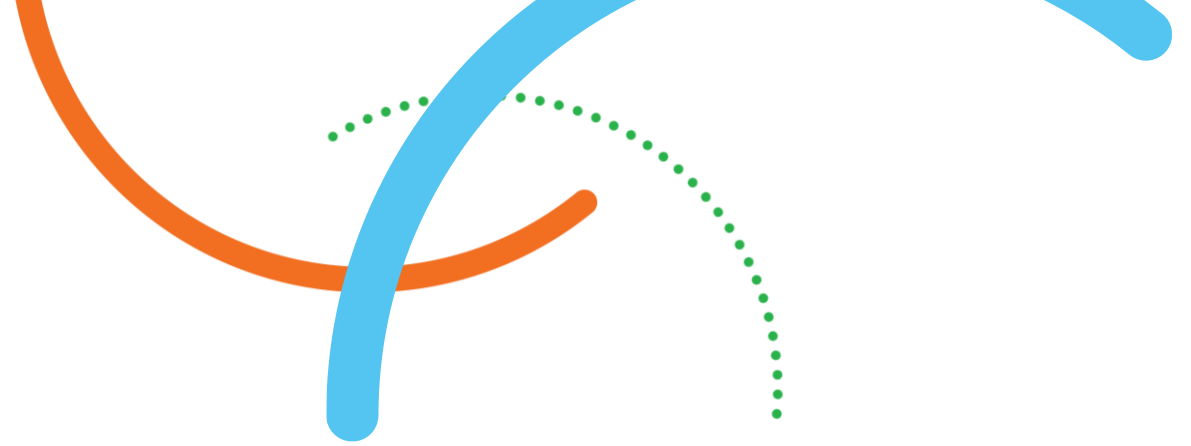
presented by





**Paul Hunton**  
President, General Manager

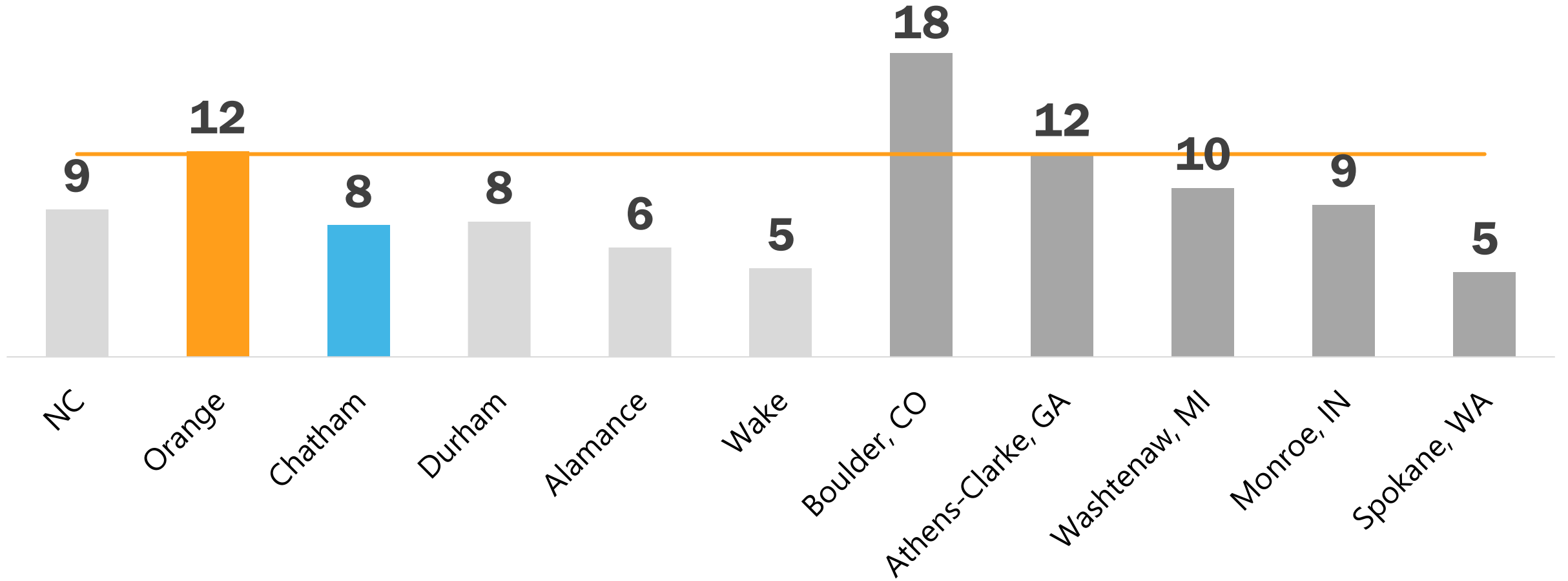




# **Education: Childcare**

# Childcare Centers

Number of centers per 1,000 children under age 5

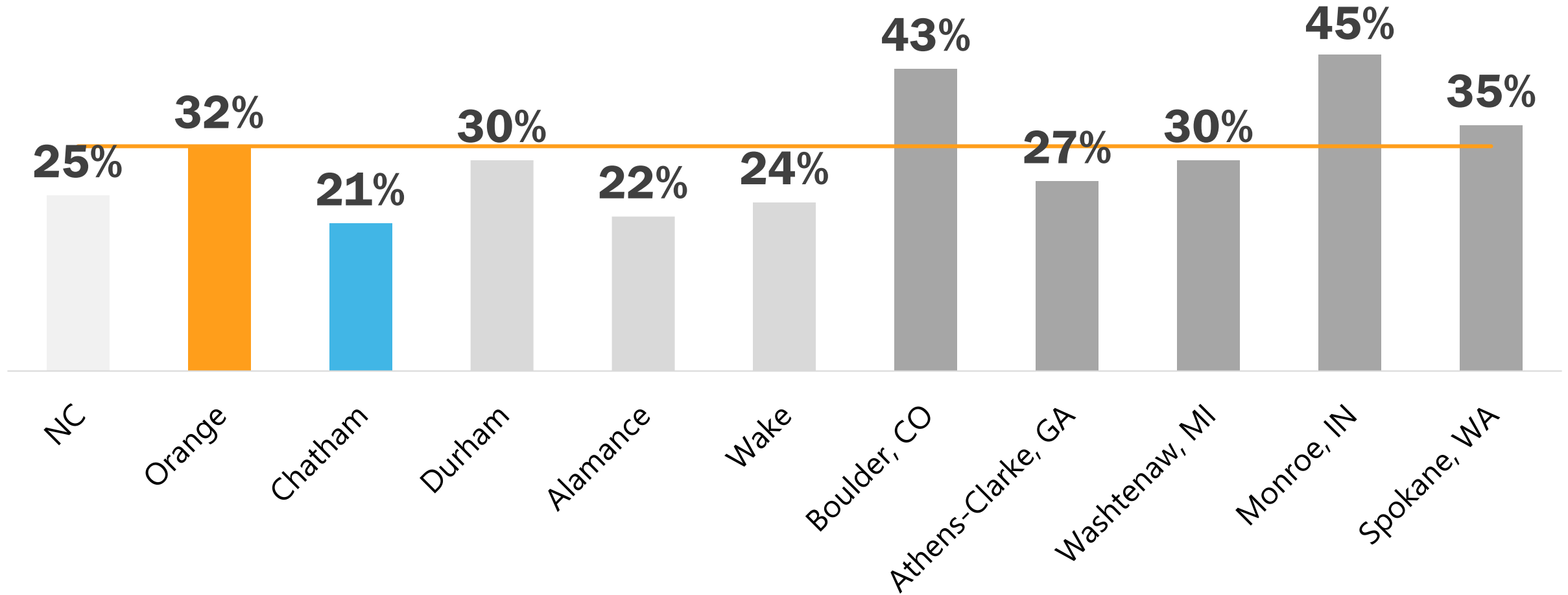


Note: Monroe, IN, Clarke, GA, and Washtenaw, MI are comparisons based on city visits done by Chamber; the other counties outside of NC are among the recommended comparison places from RWJF

Source: 2025 Robert Wood Johnson Foundation Health Rankings

# Childcare Cost Burden

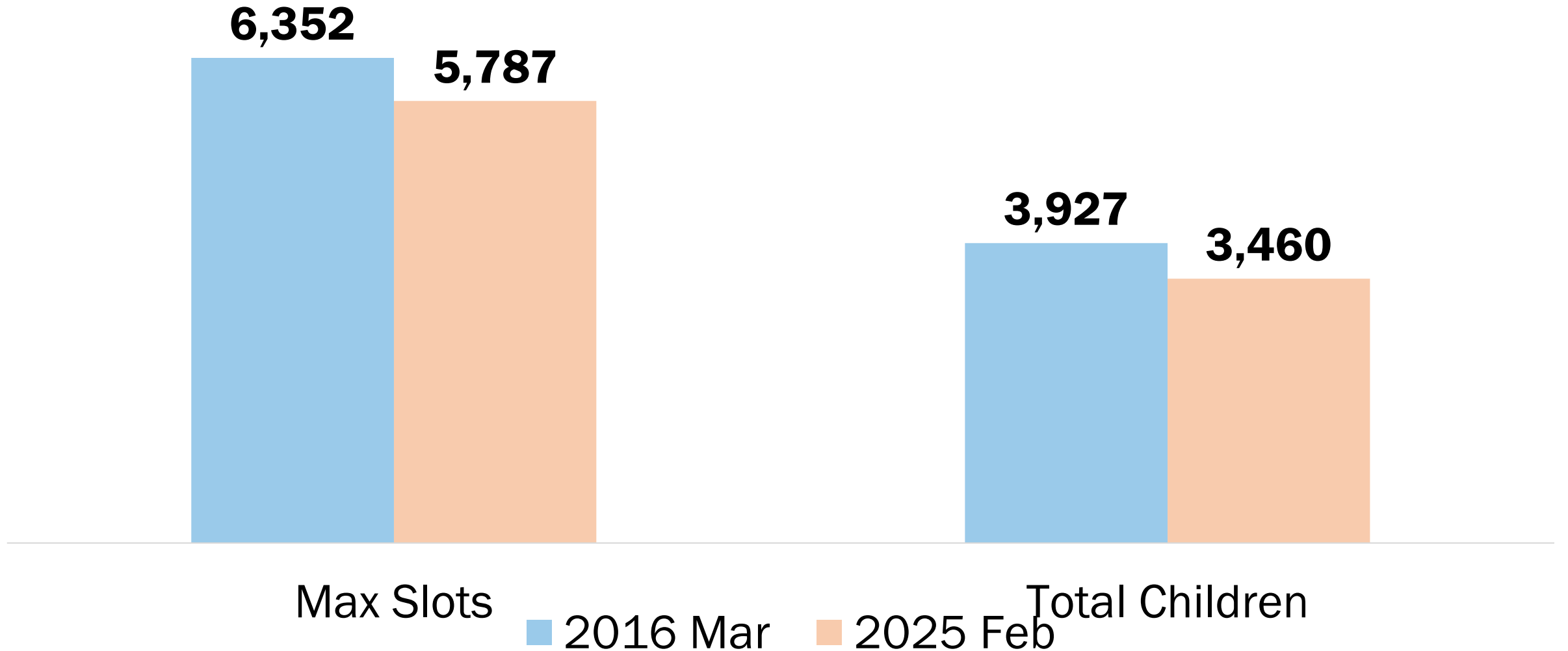
Childcare costs for a household with two children as a percent of median household income



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

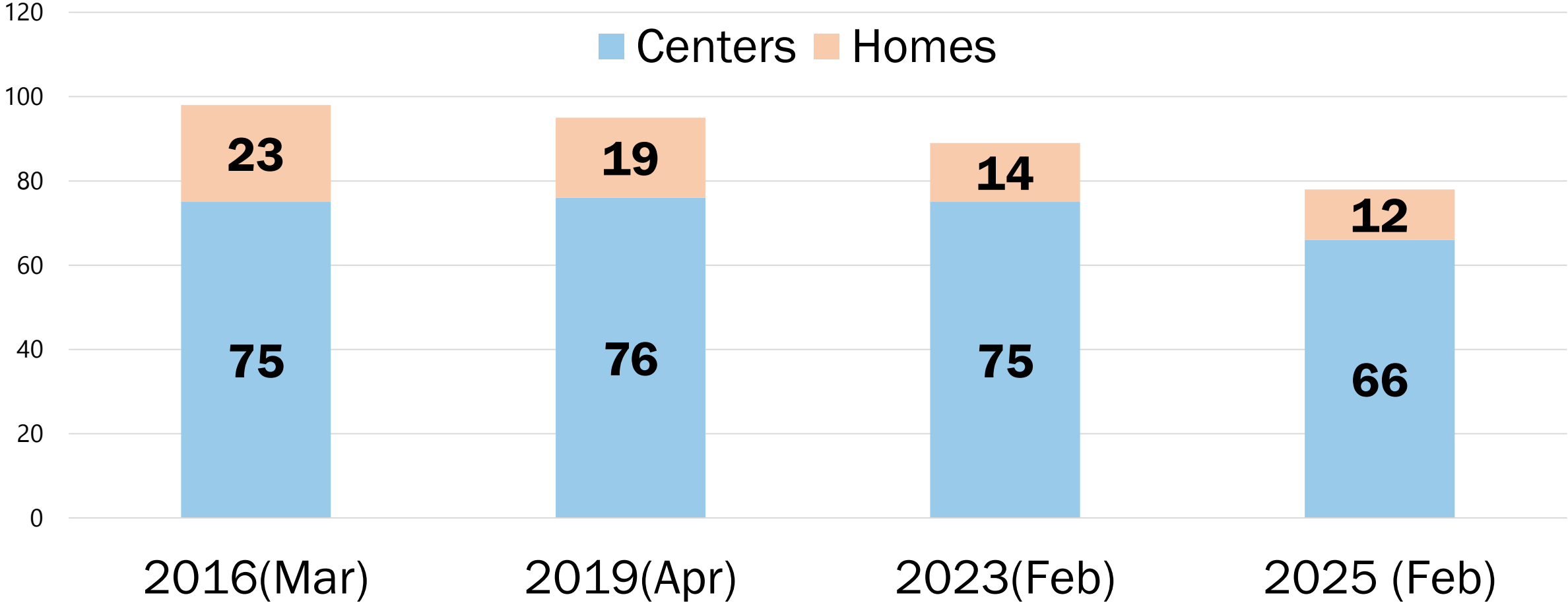
Source: 2025 Robert Wood Johnson Foundation Health Rankings

# Childcare Enrollment & Max Slots, 2016 vs. 2025



# Number of Licensed Childcare Homes & Centers Over the Decade

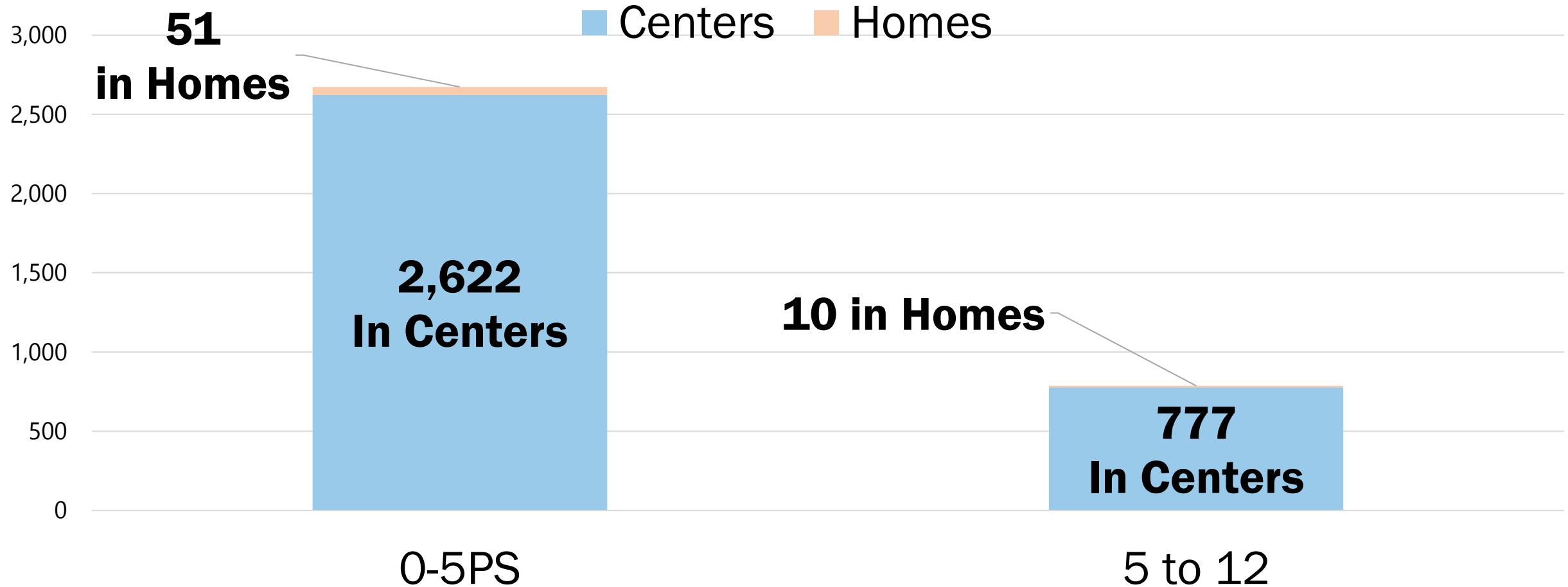
Orange County



Source: North Carolina Department of Health and Human Services

# Children Enrolled in Childcare Centers & Homes by Age

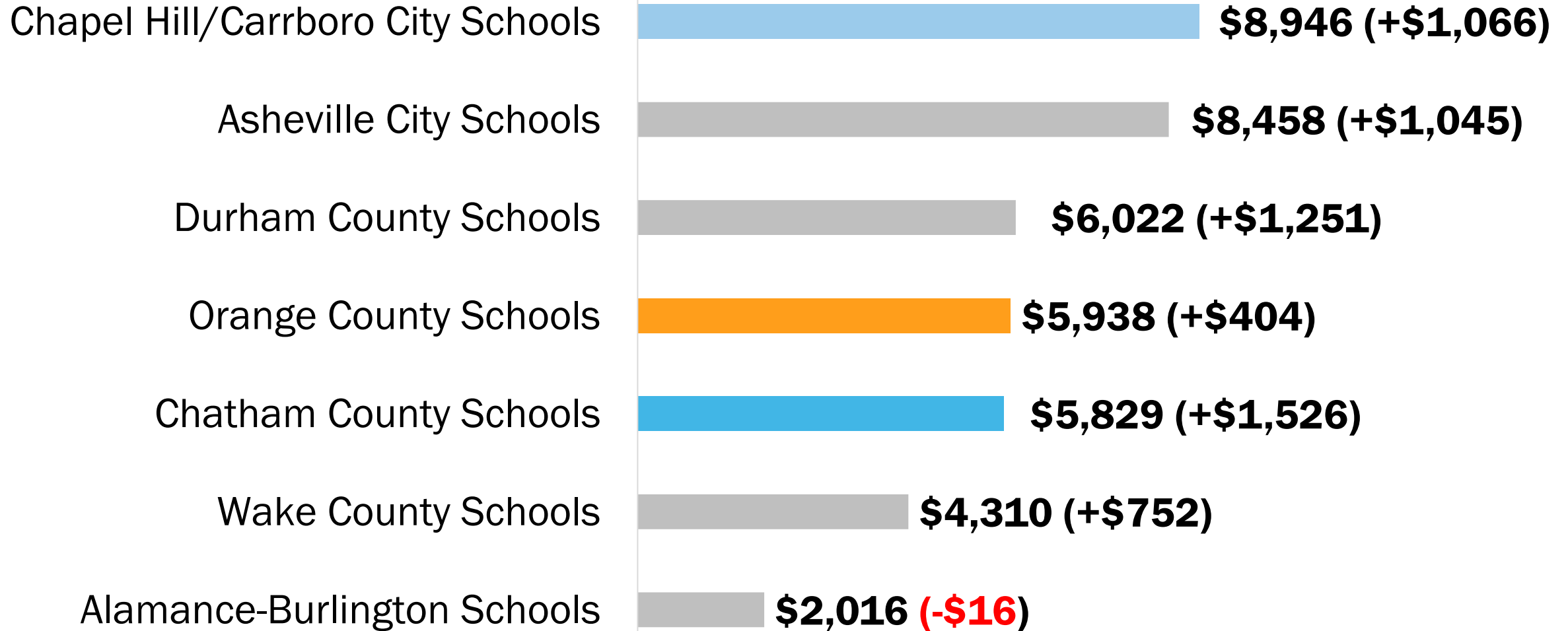
Orange County, February 2025



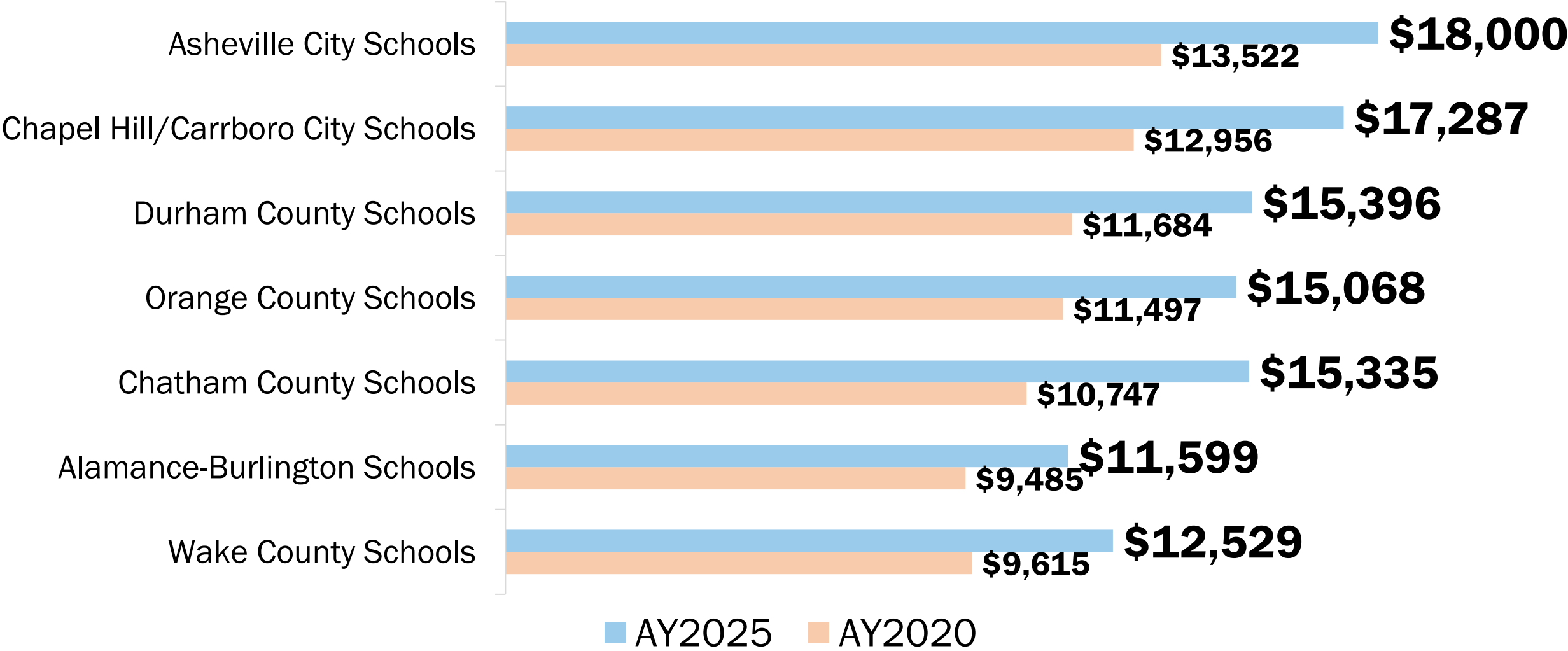
# Public Education

# Local Per Pupil Expenditure

AY2025 (with change since AY2020, inflation adjusted to \$2025)



# Total Per Pupil Expenditure AY2020 vs. AY2025

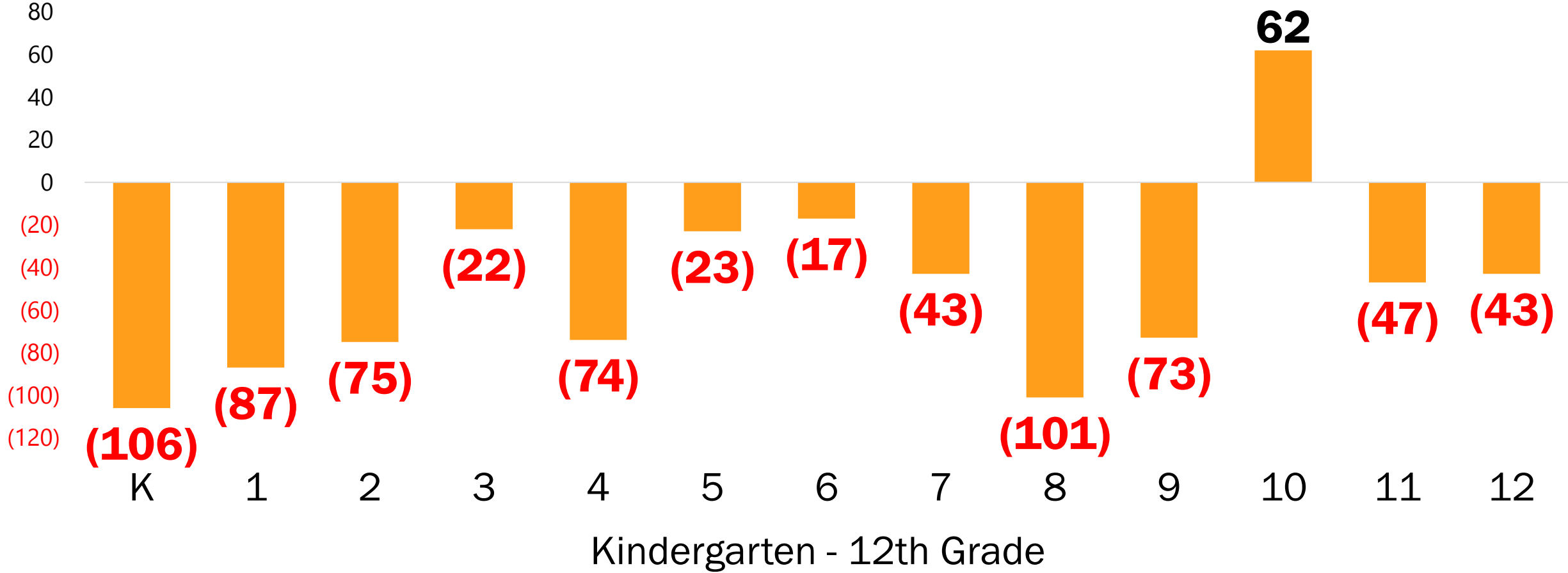


Source: NC Department of Public Instruction

# **Education: Enrollment**

# Orange County Schools Total Enrollment Declines by 649 Students Since 2020

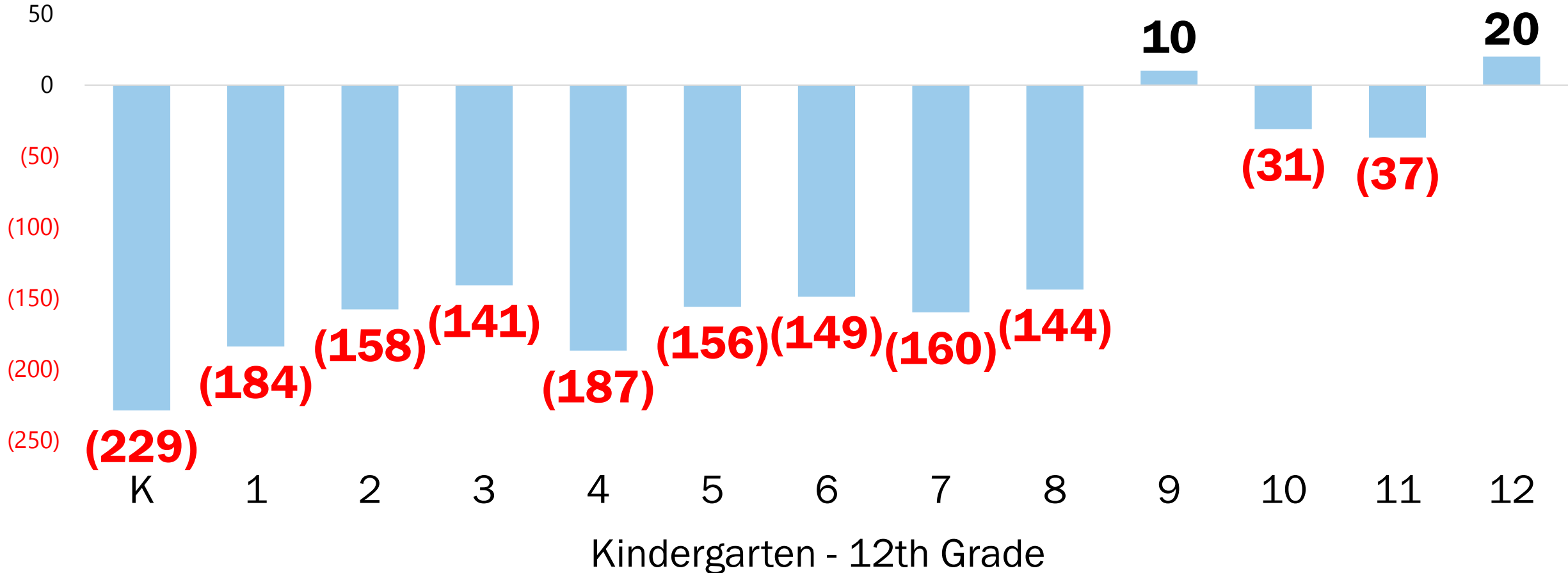
Change in Average Daily Membership (ADM), AY2020 to AY2026



Source: NC Department of Public Instruction

# CHCCS Total Enrollment Declines by 1,546 Students Since 2020

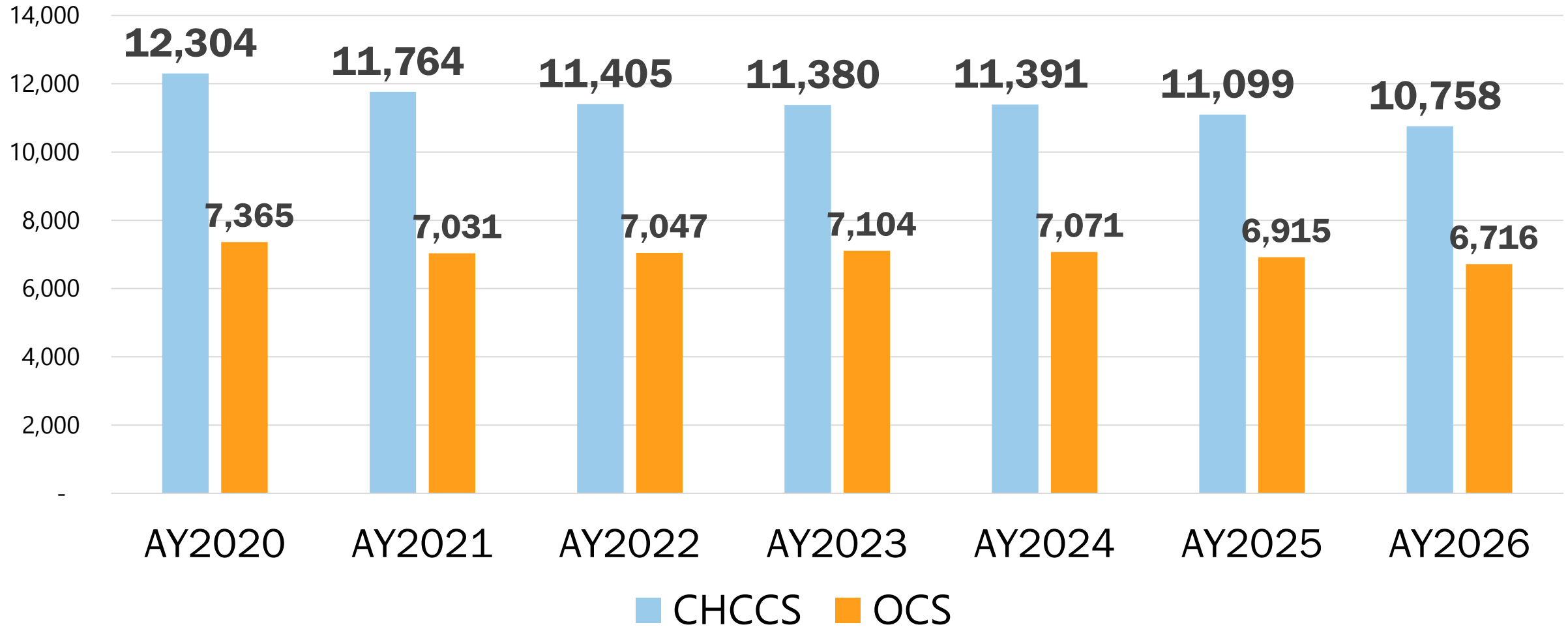
Change in Average Daily Membership (ADM), AY2020 to AY2026



Source: NC Department of Public Instruction

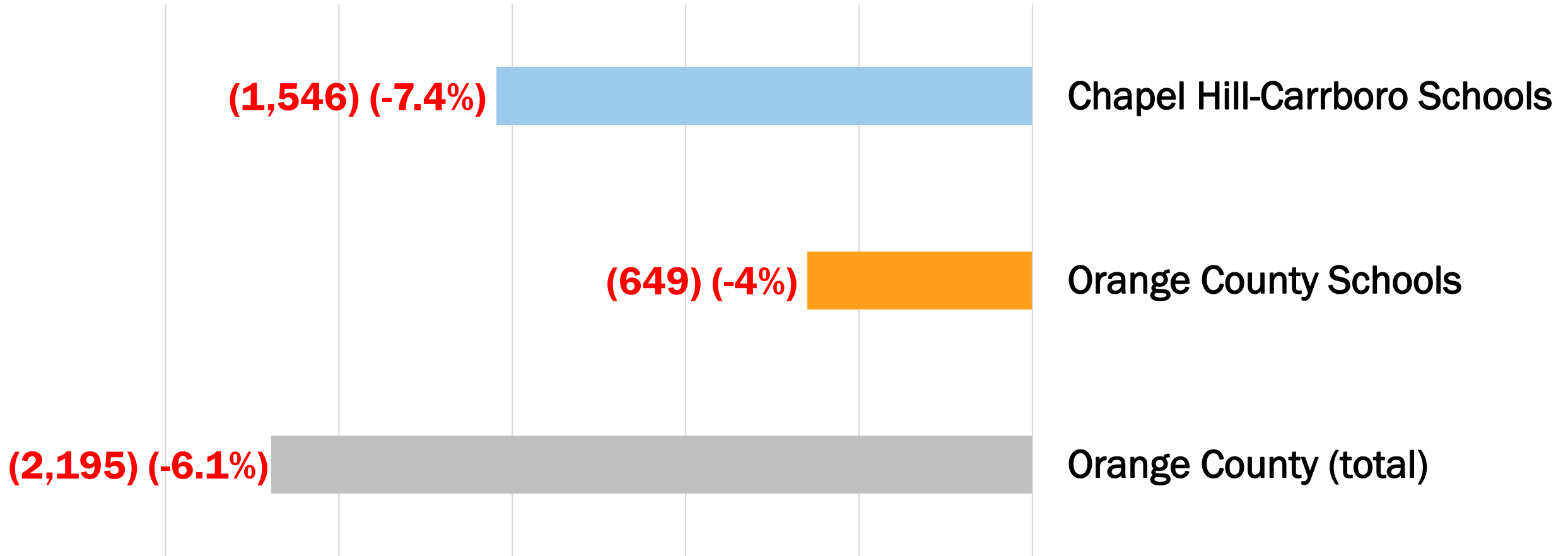
# CHCCS and OCS Enrollment, AY2020-AY2026

Average Daily Membership (ADM), AY2020-AY2026



# Student Headcount Declines

Student increase/decrease Average Daily Members (ADM) AY2020 to AY2026



# CHCCS Persistence and Progression Rates

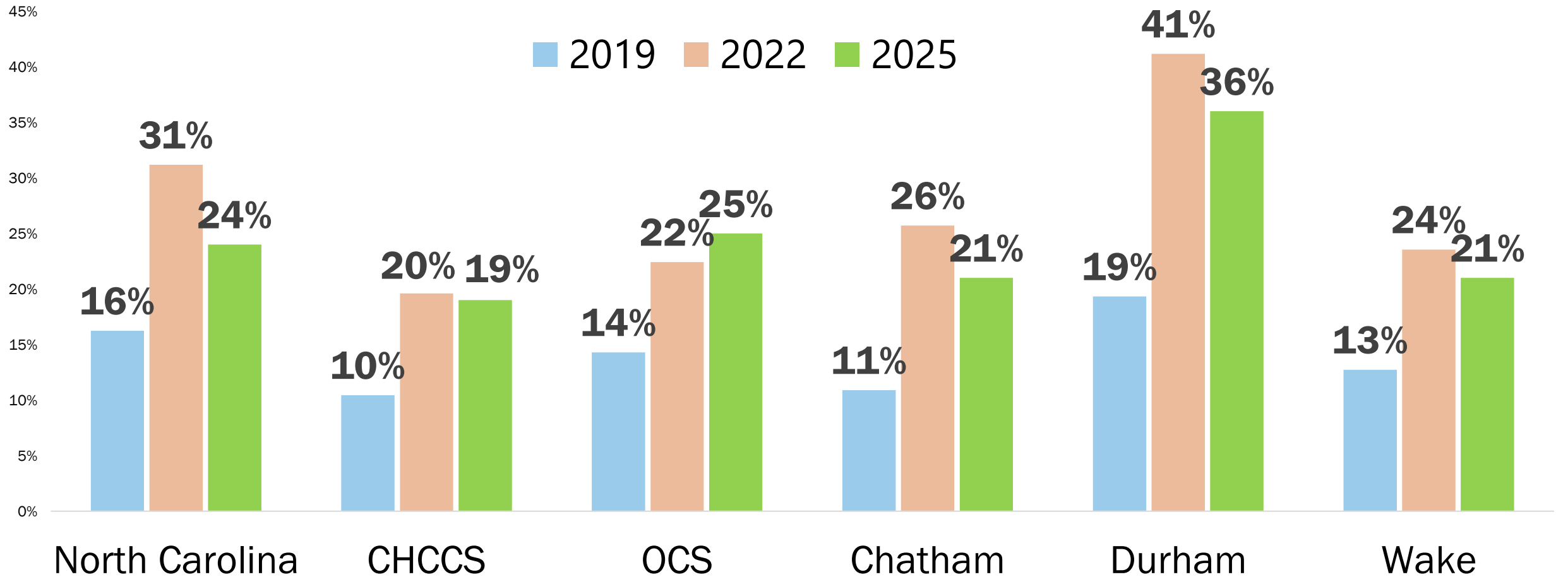
Analysis of whether there were more (green) or fewer (red) students in a grade compared to the previous grade the previous year, ie if 4<sup>th</sup> grad has more or fewer students than 3<sup>rd</sup> grade the previous year.

	K	1	2	3	4	5	6	7	8	9	10	11	12	
AY 2020	845	863	821	933	934	953	1,008	1,019	1,005	1,010	1,000	1,007	906	12,304
AY 2021	703	806	794	785	911	927	923	990	999	1,035	982	966	943	11,764
AY 2022	672	752	807	819	793	899	913	916	976	1,047	1,000	914	897	11,405
AY 2023	686	703	761	831	842	818	906	940	942	1,052	1,023	973	903	11,380
AY 2024	619	766	720	793	846	871	852	929	951	1,059	1,044	983	958	11,391
AY 2025	655	667	784	747	804	853	864	846	945	1,020	1,018	966	915	11,099
AY 2026	616	679	663	792	747	797	859	859	861	1,020	969	970	926	10,758

# **Education: Absenteeism**

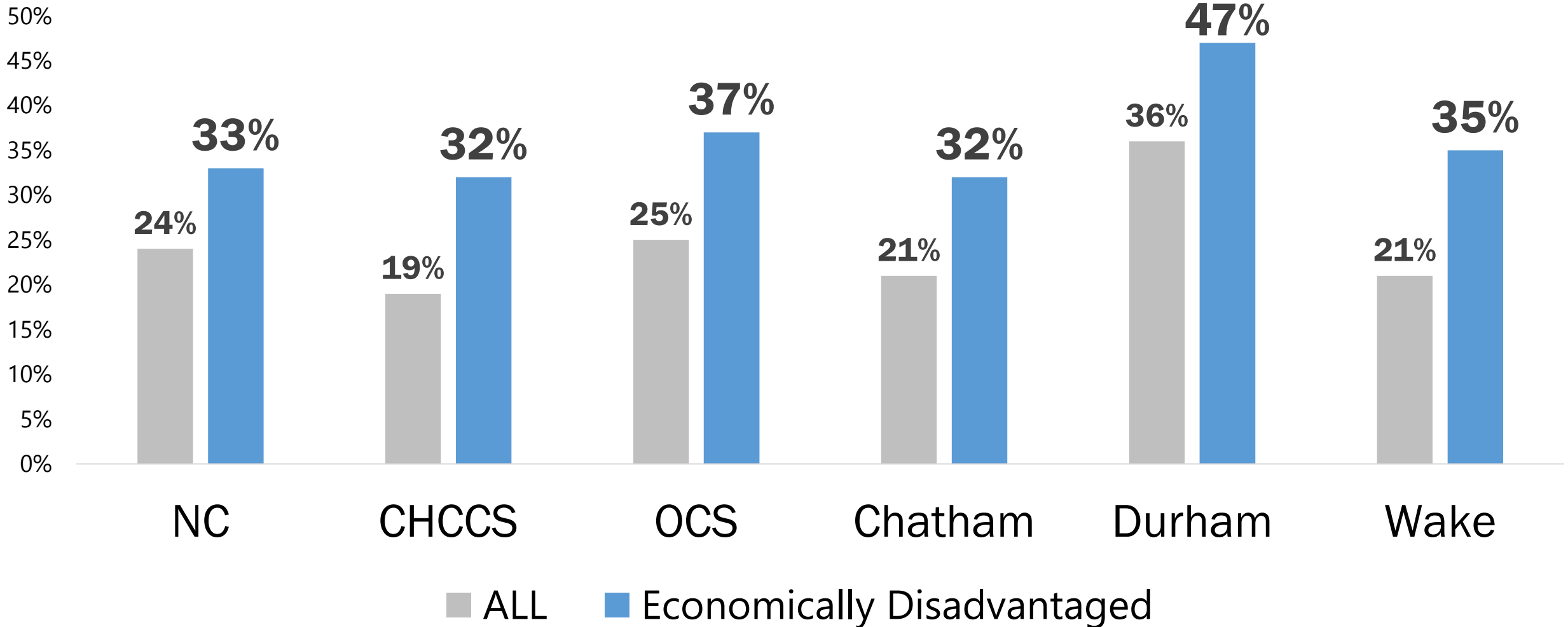
# Chronic Absenteeism – 2019 vs. 2022 vs. 2025

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



# Chronic Absenteeism by Family Income– AY2025

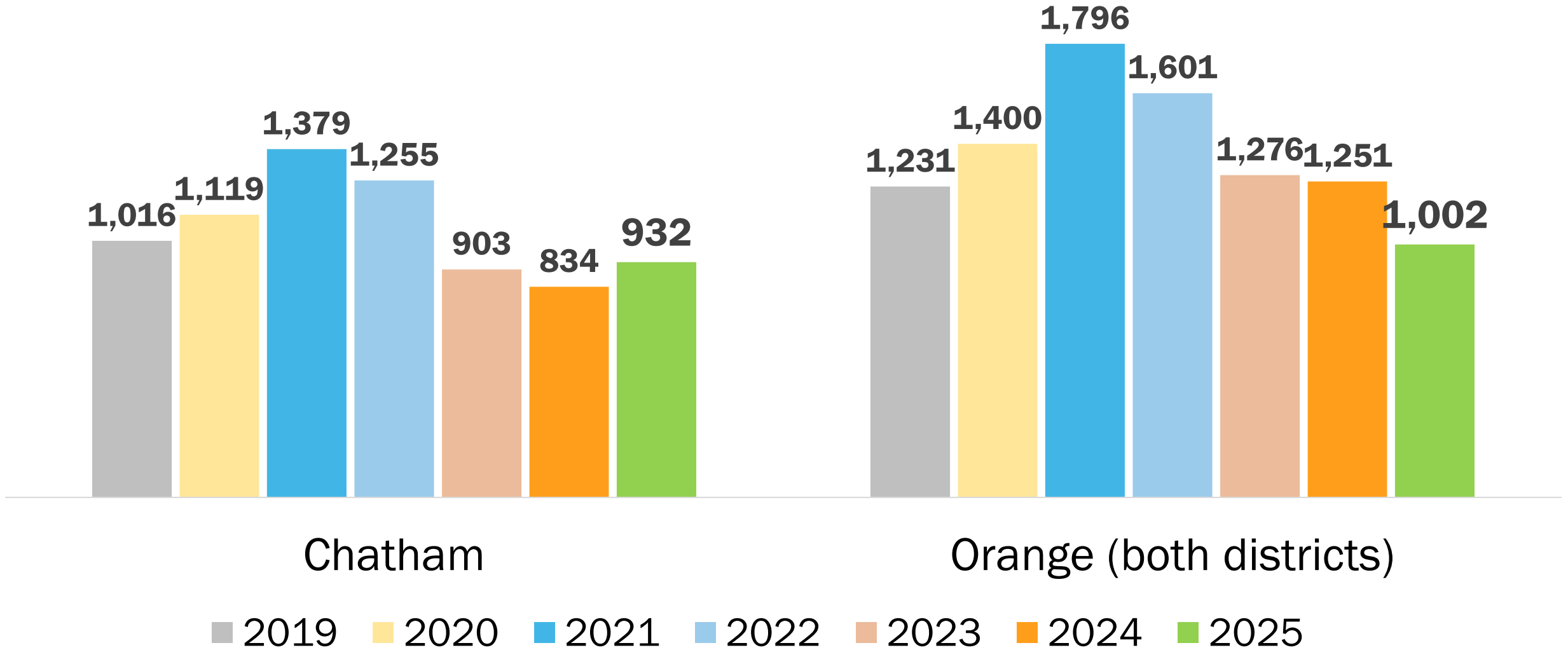
Chronic absenteeism is defined as missing 10% of school days in a year (18+ days if enrolled for the full school year)



**Education: Private/Home**

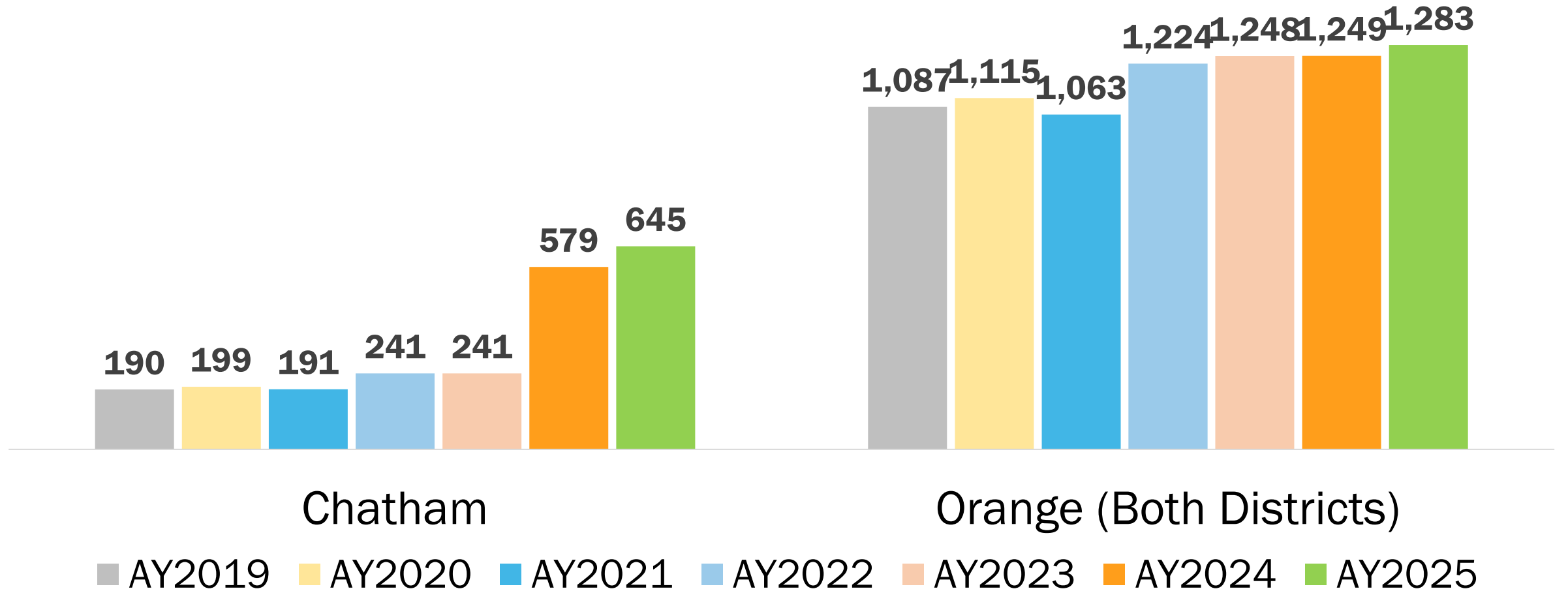
# Home School Enrollment

Number of students enrolled in home school, AY2019 – AY2025



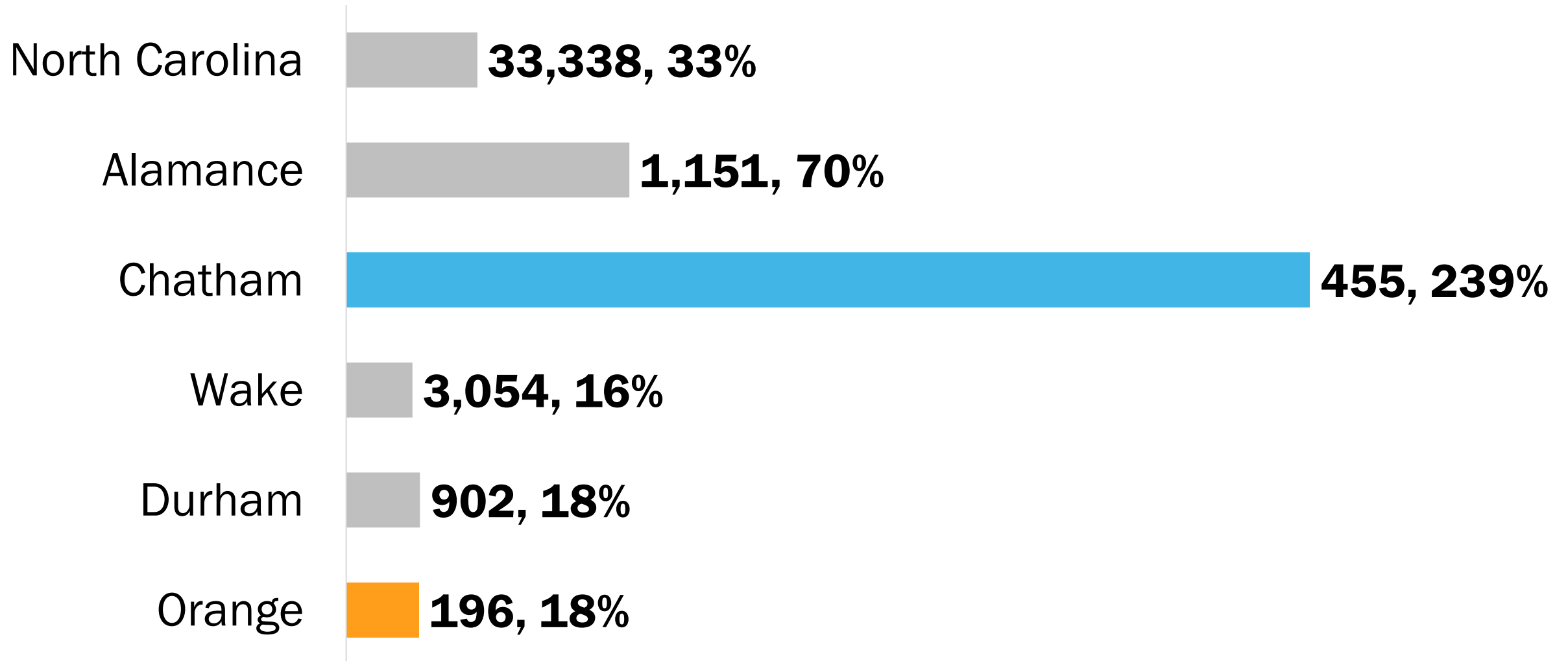
# Private School Enrollment

Number of students enrolled in private school, AY2019 – AY2025



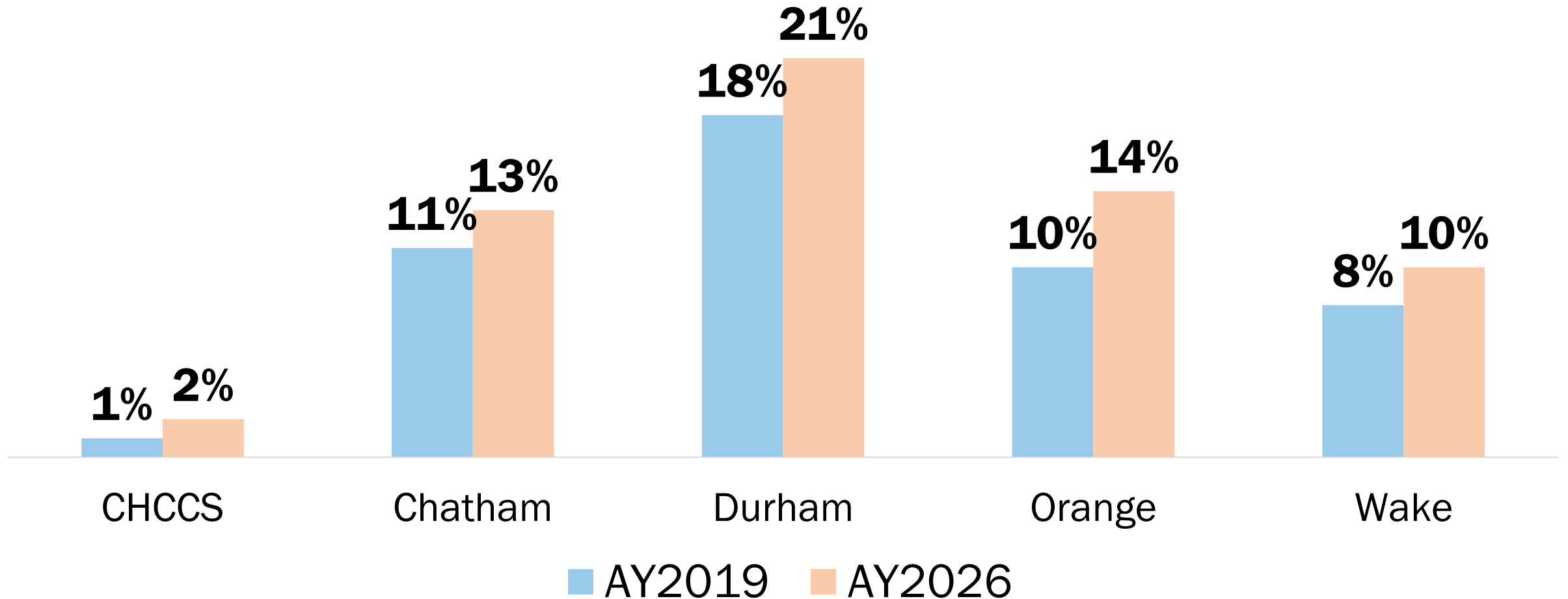
# Change in Private School Enrollments

Number and percent change in private school enrollments from AY2019 to AY2025



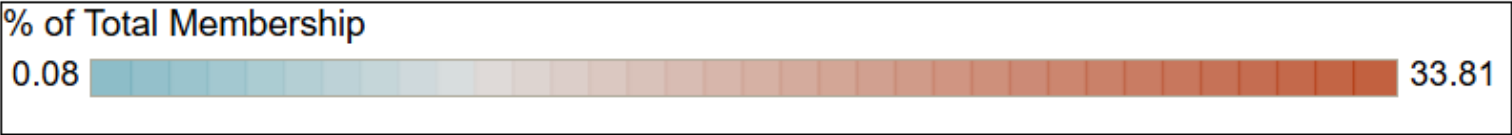
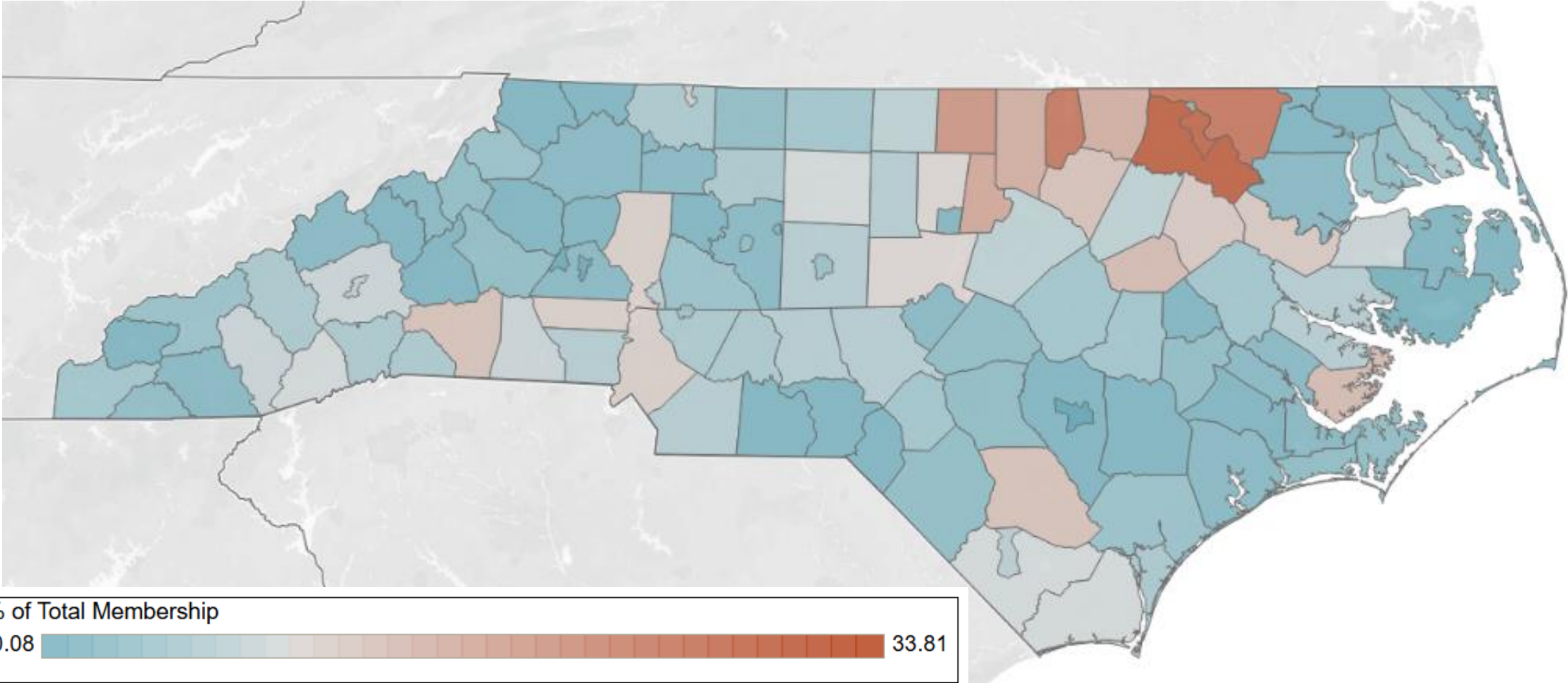
# Percent of Students Enrolled in Charter Schools

AY2019 vs. AY2026



# 2019 Charter School Enrollment

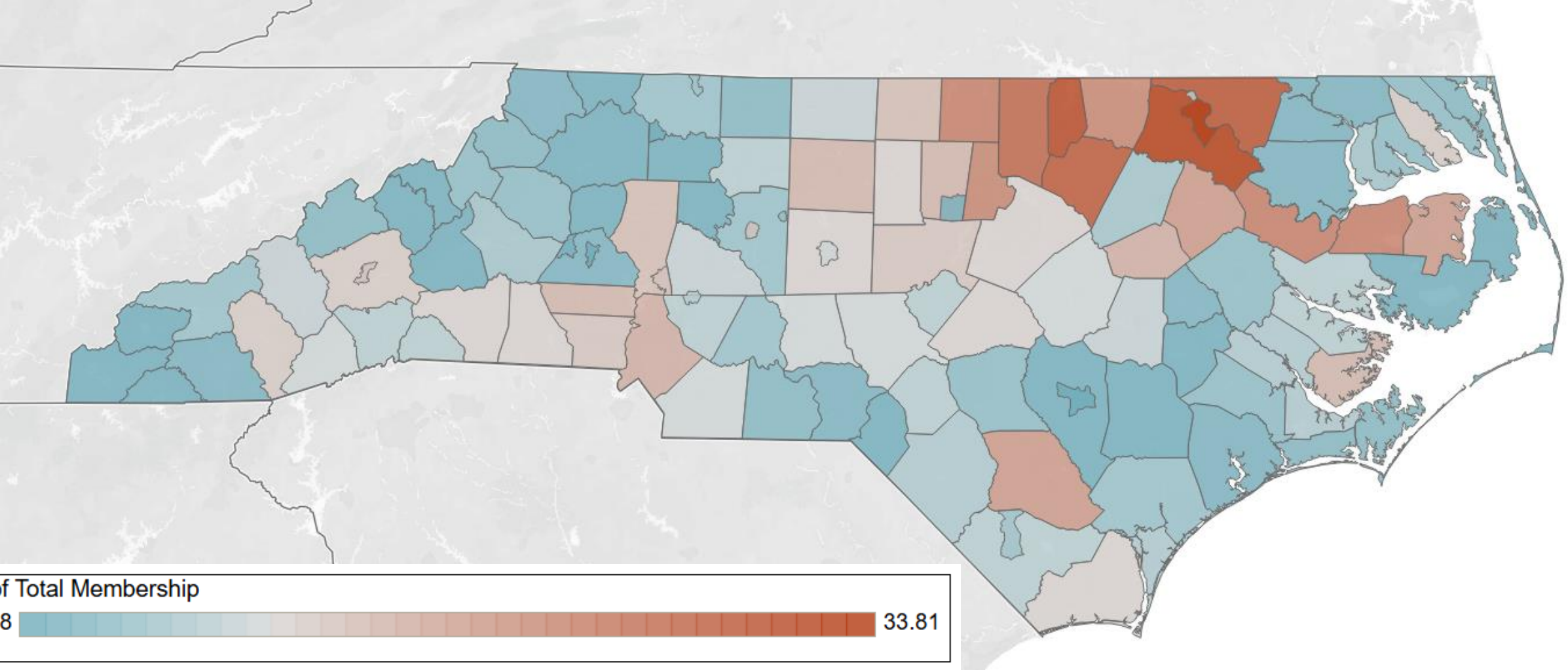
As a percentage of all students



Source: NC Department of Administration

# 2026 Charter School Enrollment

As a percentage of all students

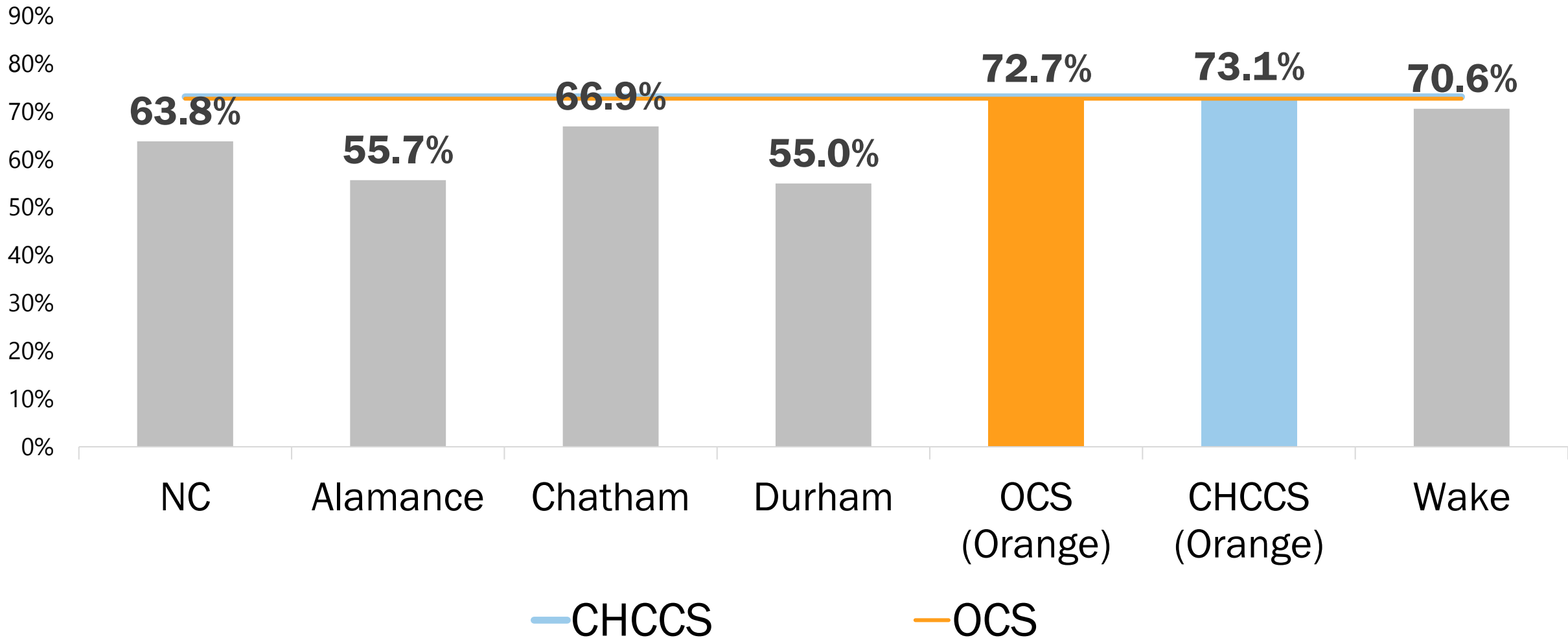


Source: NC Department of Administration

**Education: 3rd Grade**

# 3<sup>rd</sup> Grade Math End of Grade (EOG) Test – AY2025

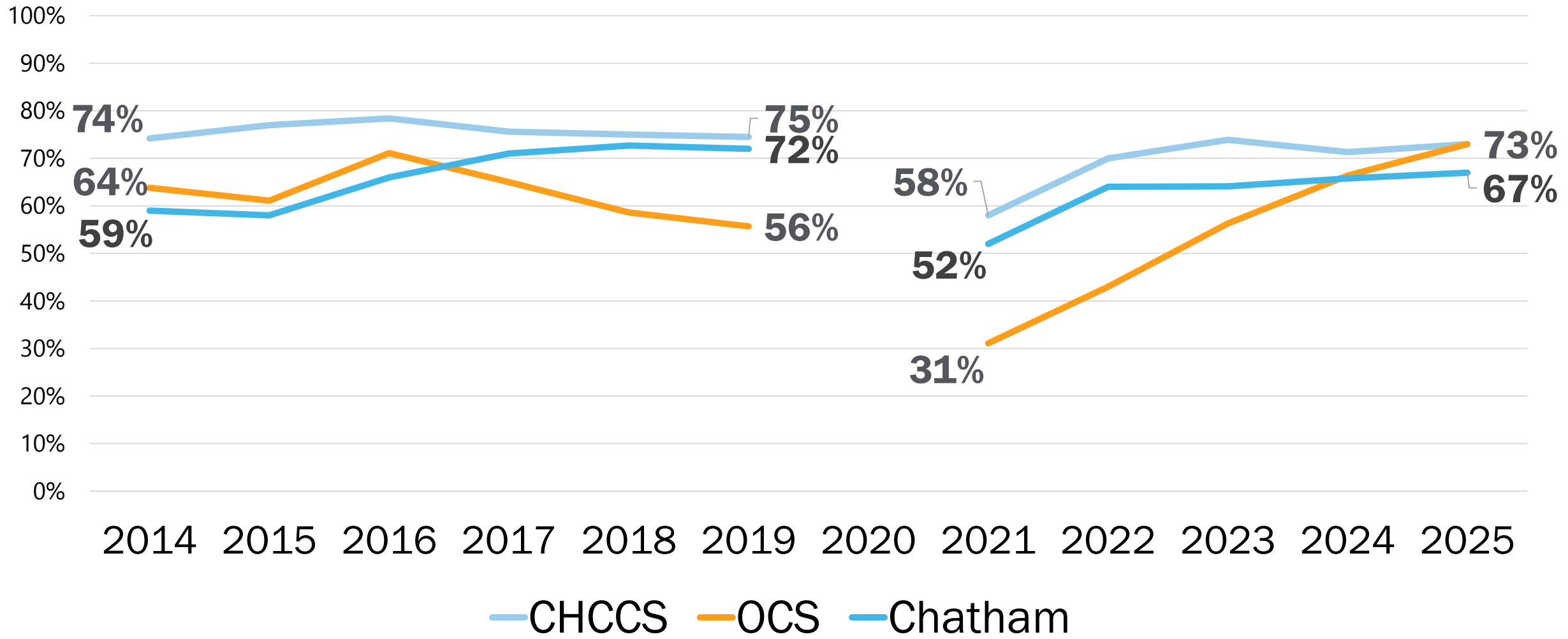
Percent of students “Grade Level Proficient” (level 3+) on Grade 3 Math EOG test, AY2025



Source: NC Department of Public Instruction

# 3rd Grade Math Proficiency Over the Decade

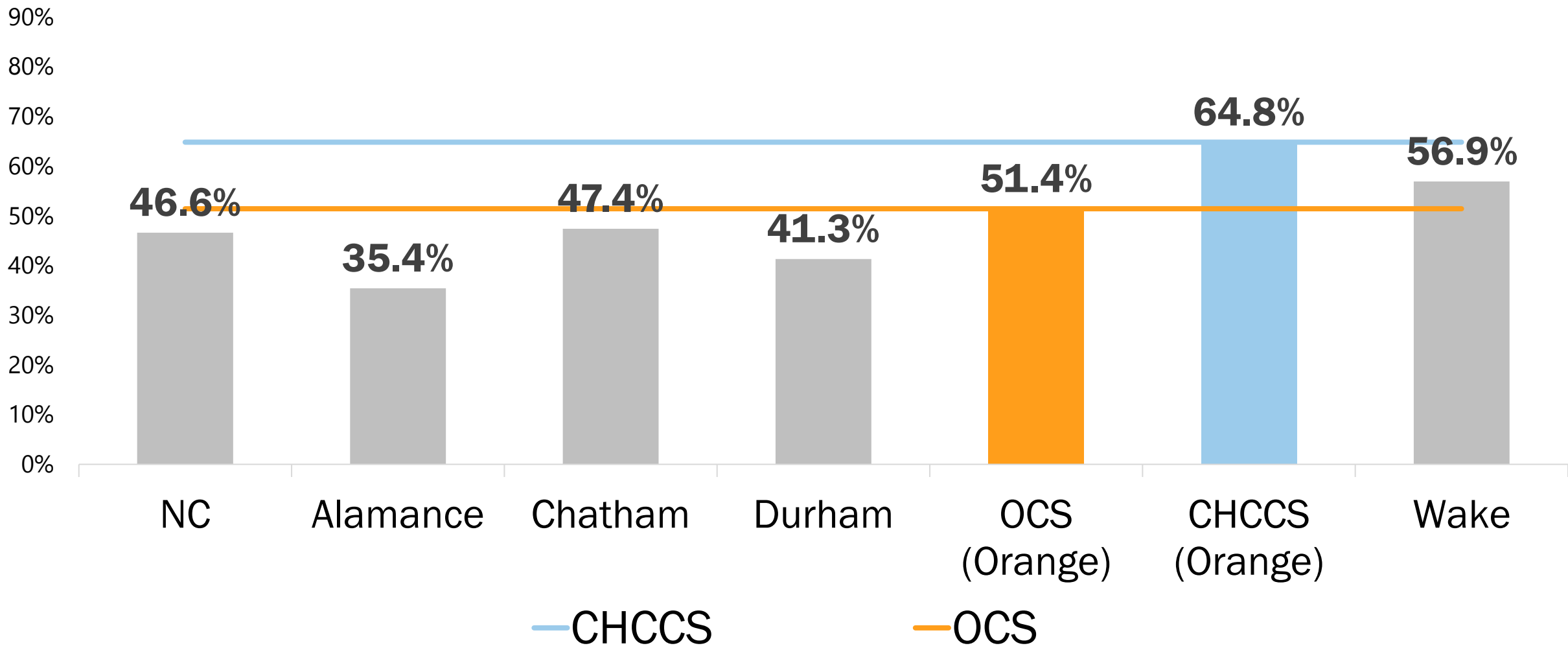
Percent of students “Grade Level Proficient” (level 3+) on Grade 3 Math EOG test, AY2016-AY2025. No EOG tests were taken in 2020.



Source: NC Department of Public Instruction

# 3<sup>rd</sup> Grade Reading End of Grade (EOG) Test – AY2025

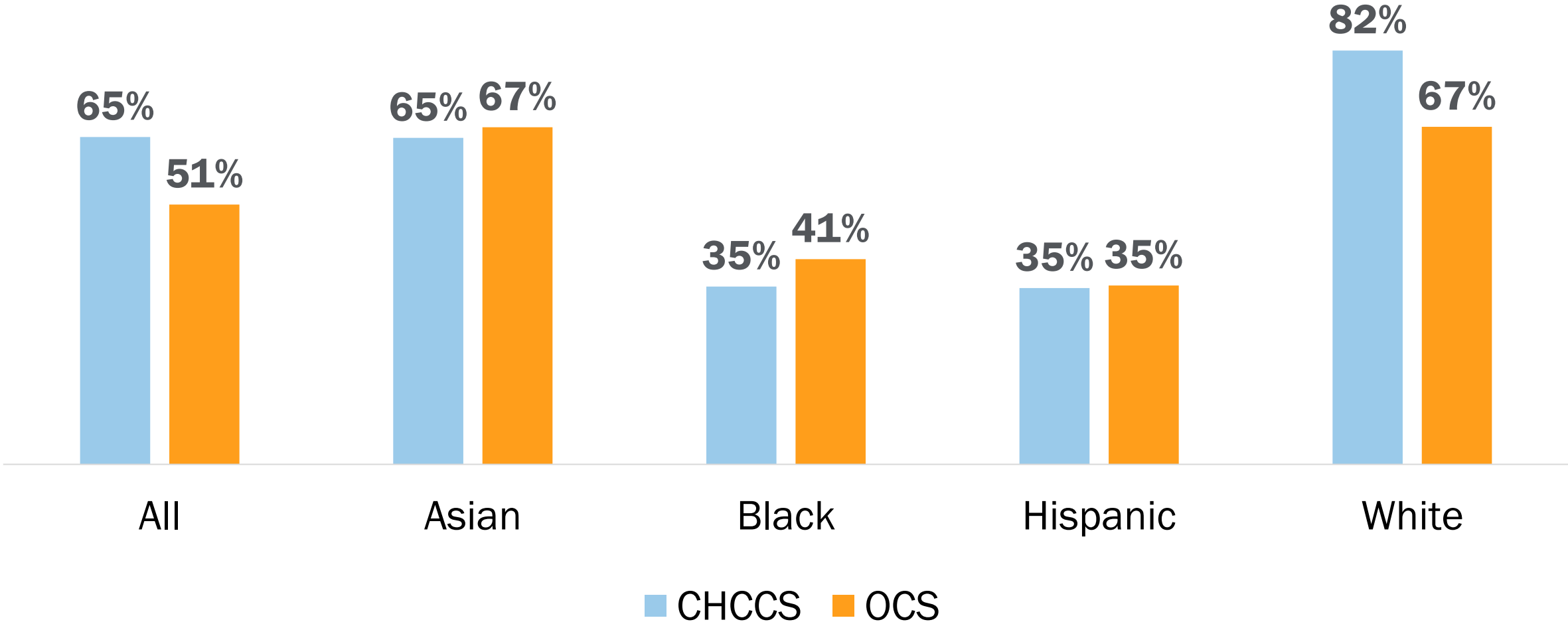
Percent of students “Grade Level Proficient” (level 3+) on Grade 3 Reading EOG test, AY2025



Source: NC Department of Public Instruction

# 3<sup>rd</sup> Grade Reading Proficiency – AY2025

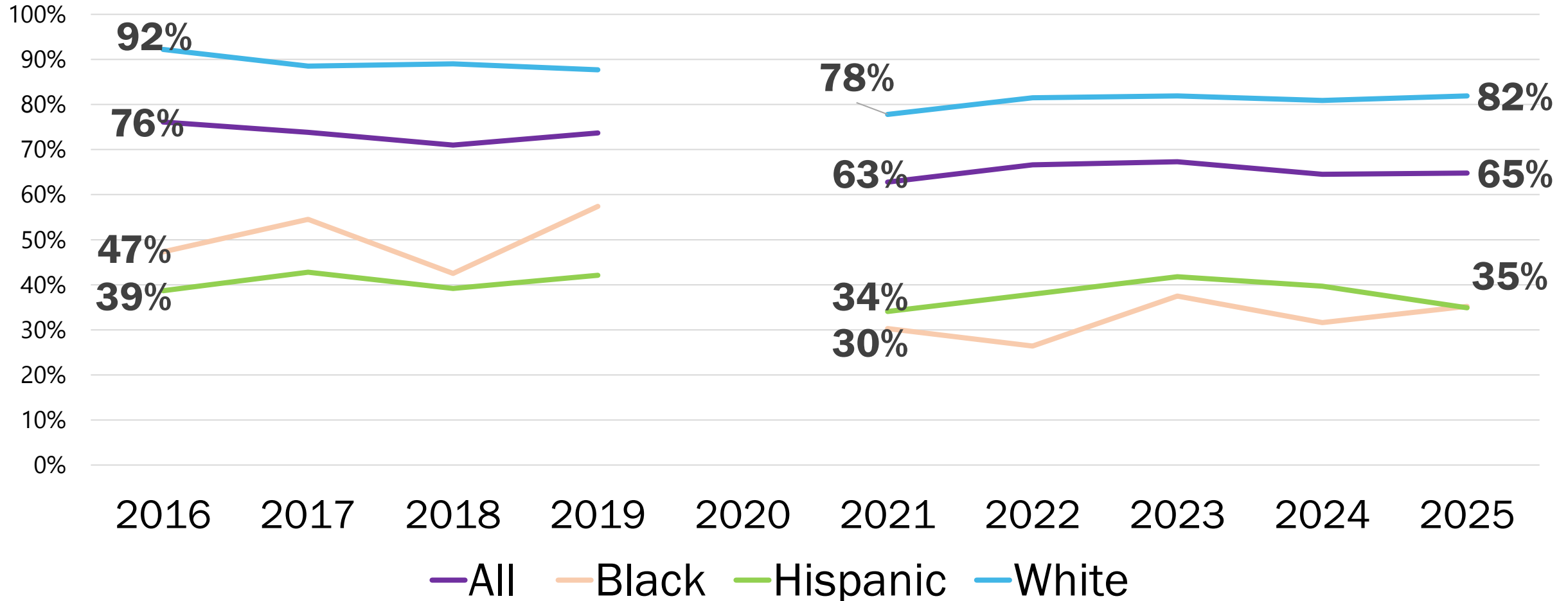
Percent of students “Grade Level Proficient” (level 3+) on Grade 3 Reading EOG test, AY2025



Source: NC Department of Public Instruction

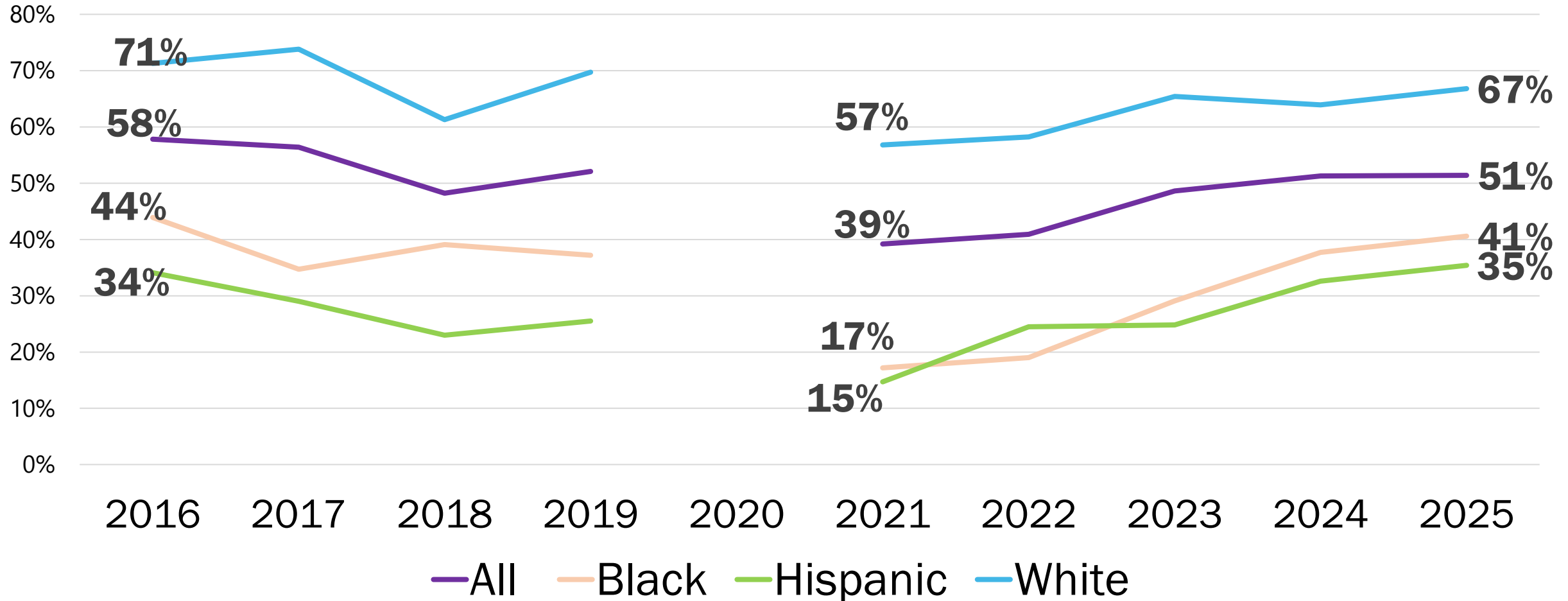
# CHCCS 3rd Grade Reading Proficiency Over the Decade

Percent of CHCCS students earning “Grade Level Proficient” scores (level 3+) on Grade 3 Reading EOG test, by race/ethnicity, AY2016-AY2025



# OCS 3rd Grade Reading Proficiency Over the Decade

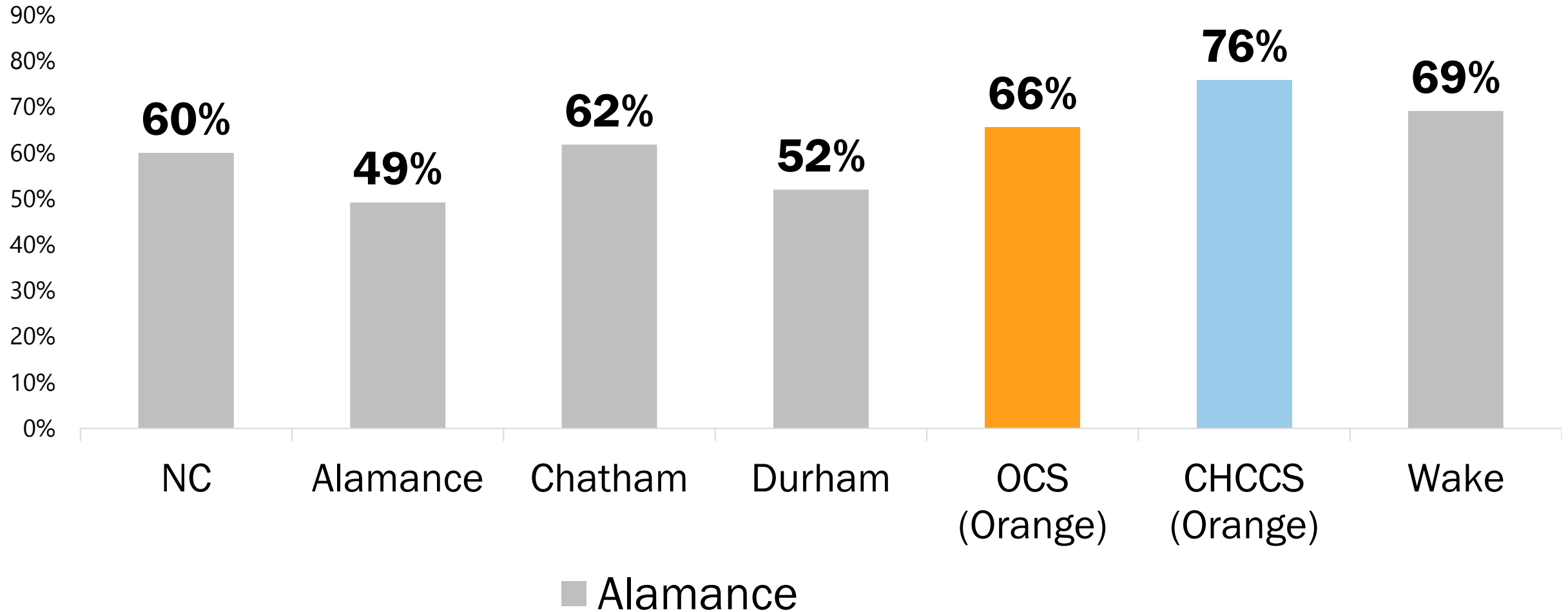
Percent of OCS students earning “Grade Level Proficient” scores (level 3+) on Grade 3 Reading EOG test, by race/ethnicity, AY2016-AY2025



**Education: 8th Grade**

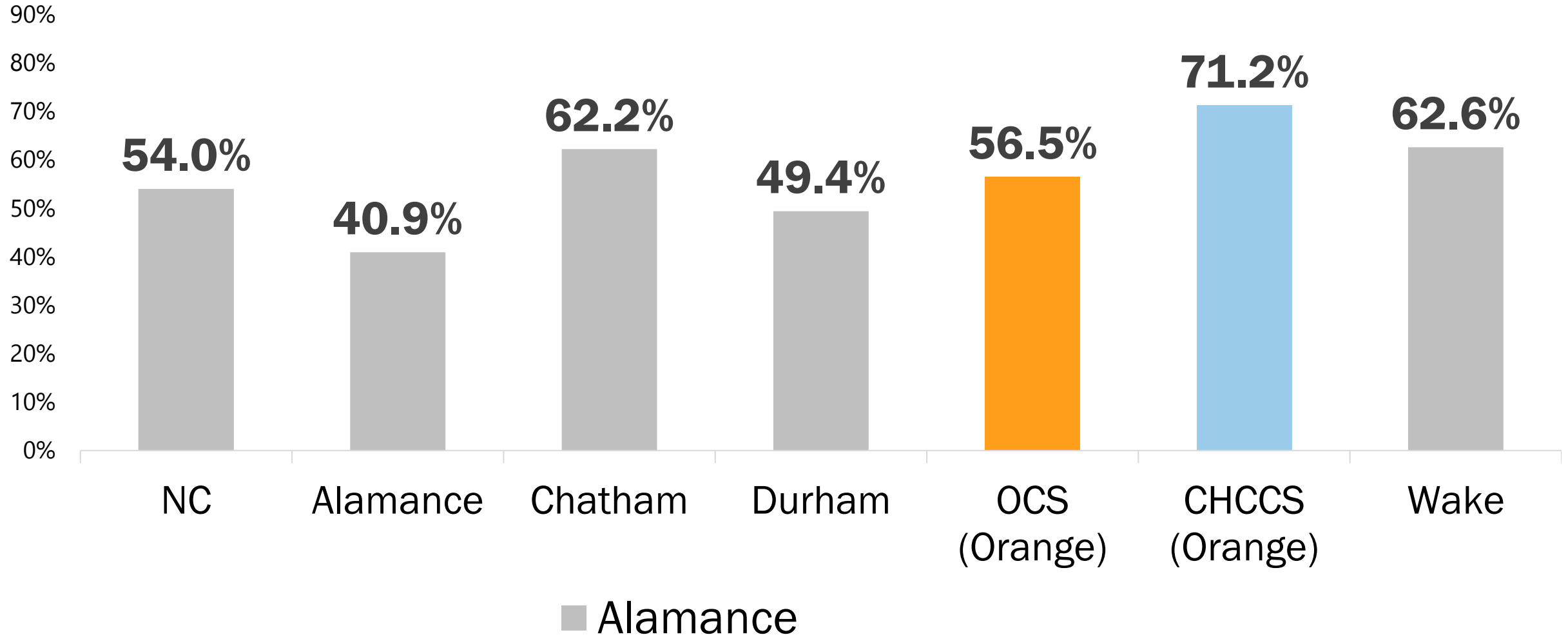
# 8<sup>th</sup> Grade Science End of Grade Test – AY2025

Percent of students “Grade Level Proficient” (level 3+) on Grade 8 Science EOG test, AY2025



# 8<sup>th</sup> Grade Reading End of Grade Test – AY2025

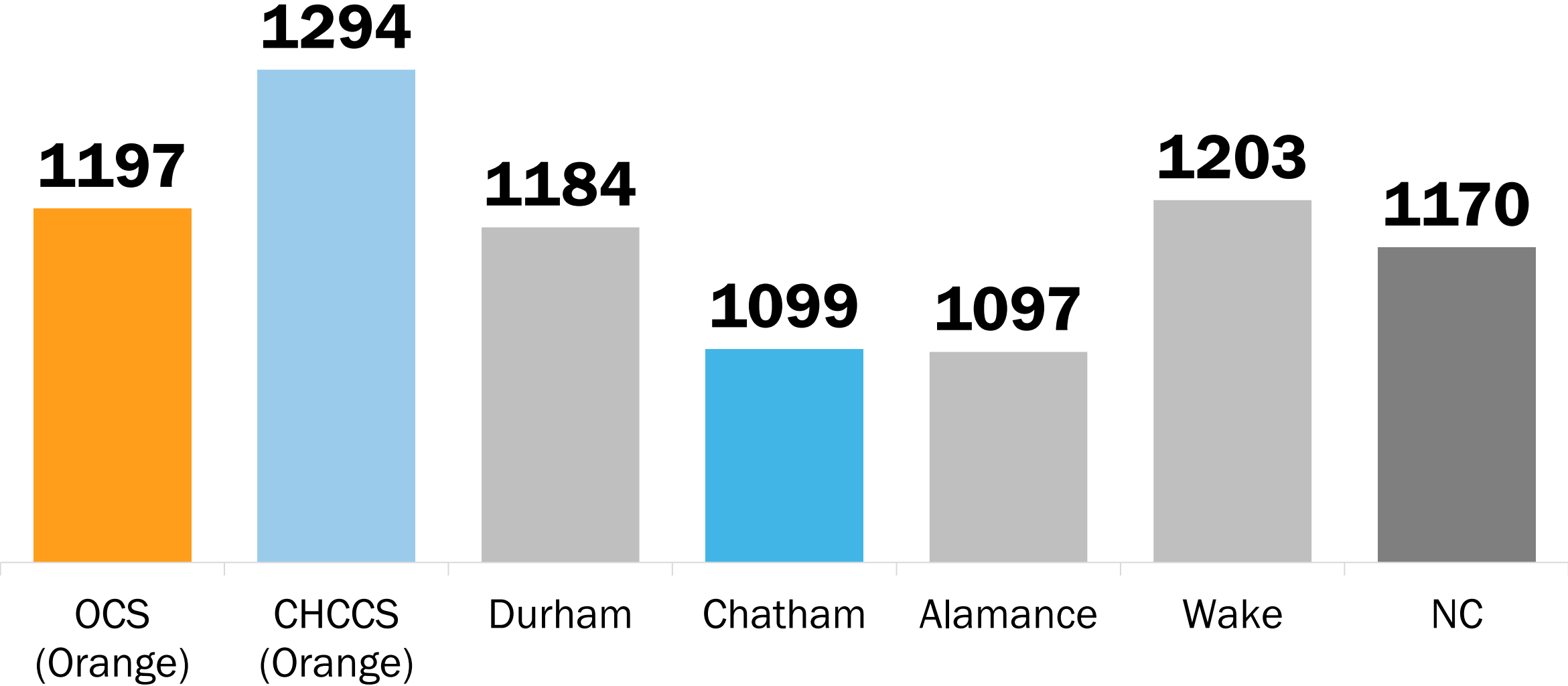
Percent of students “Grade Level Proficient” (level 3+) on Grade 8 Reading EOG test, AY2025



**Education: High School**

# Average SAT Total Scores

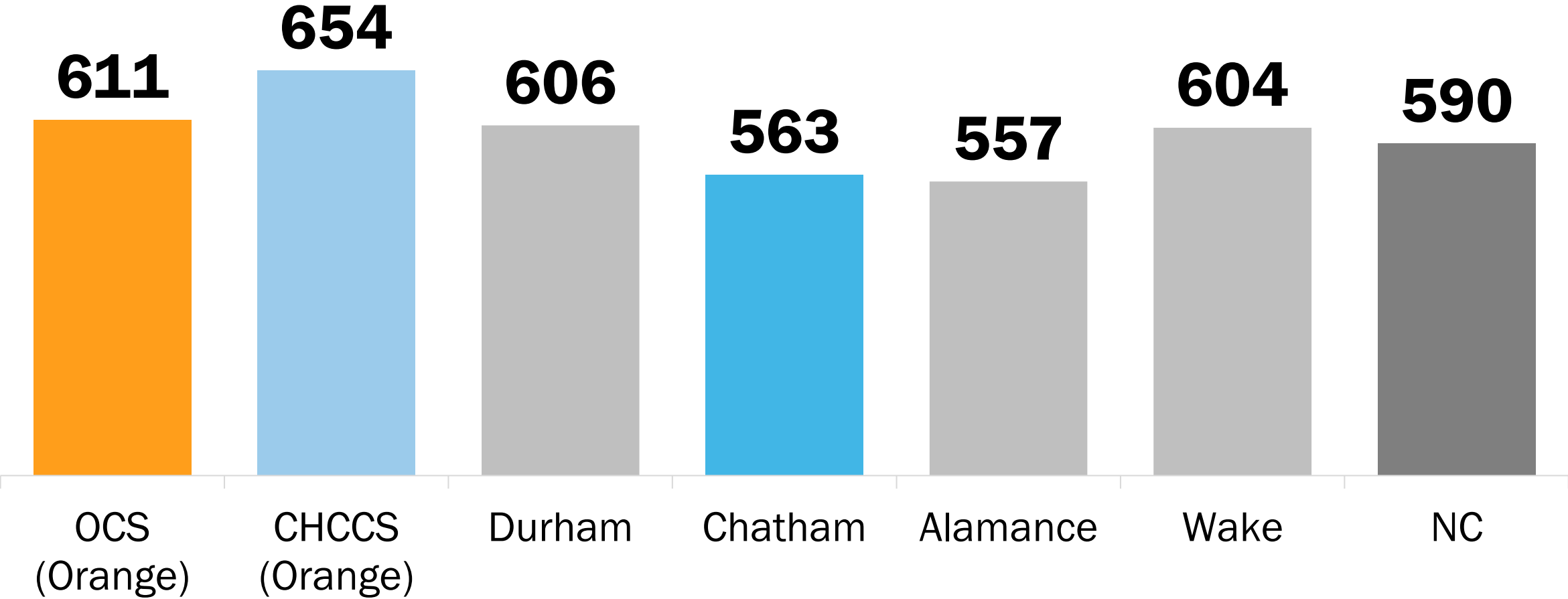
Average scores, AY2025



Source: NC Department of Public Instruction

# SAT Evidence-Based Reading and Writing Scores

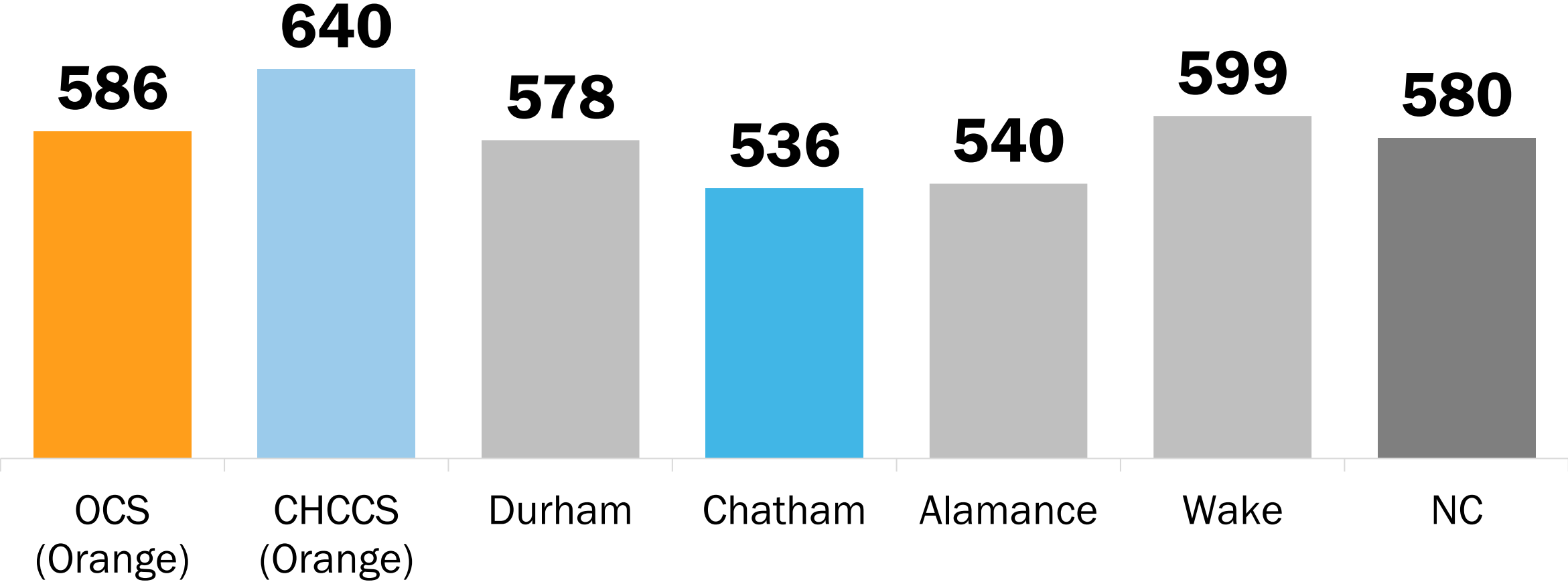
Average scores, AY2025



Source: NC Department of Public Instruction

# SAT Math Scores

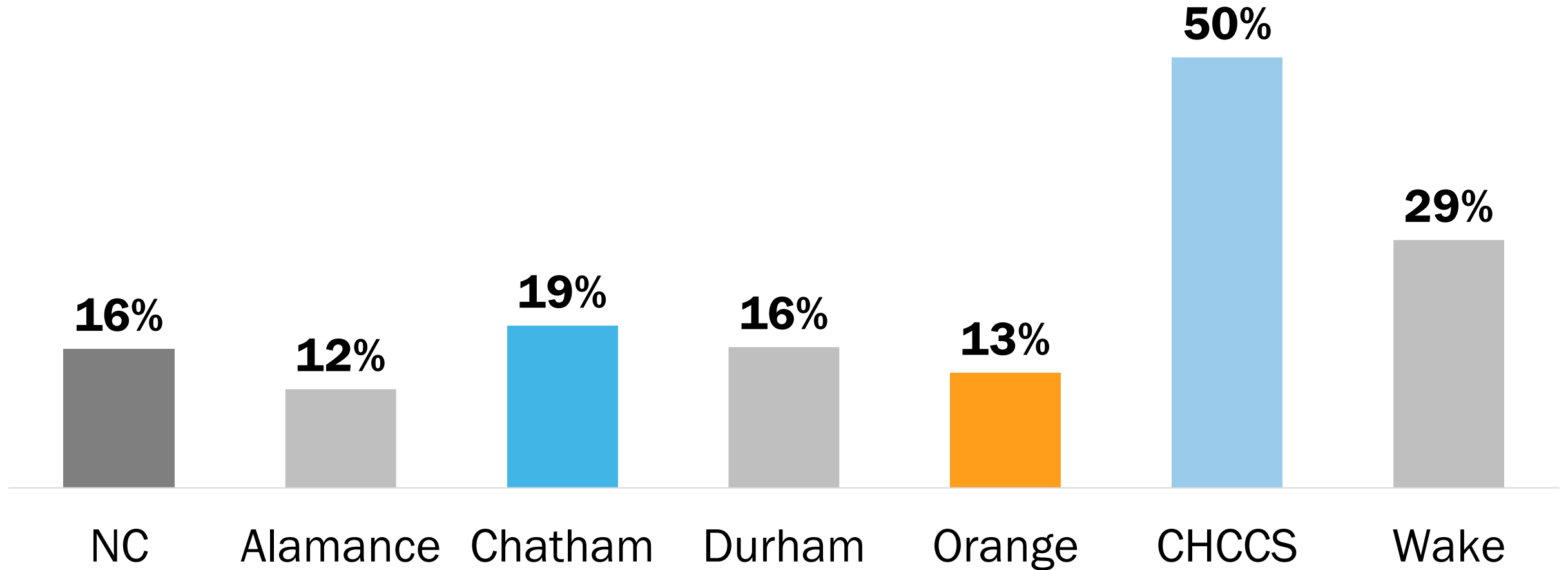
Average scores, AY2025



Source: NC Department of Public Instruction

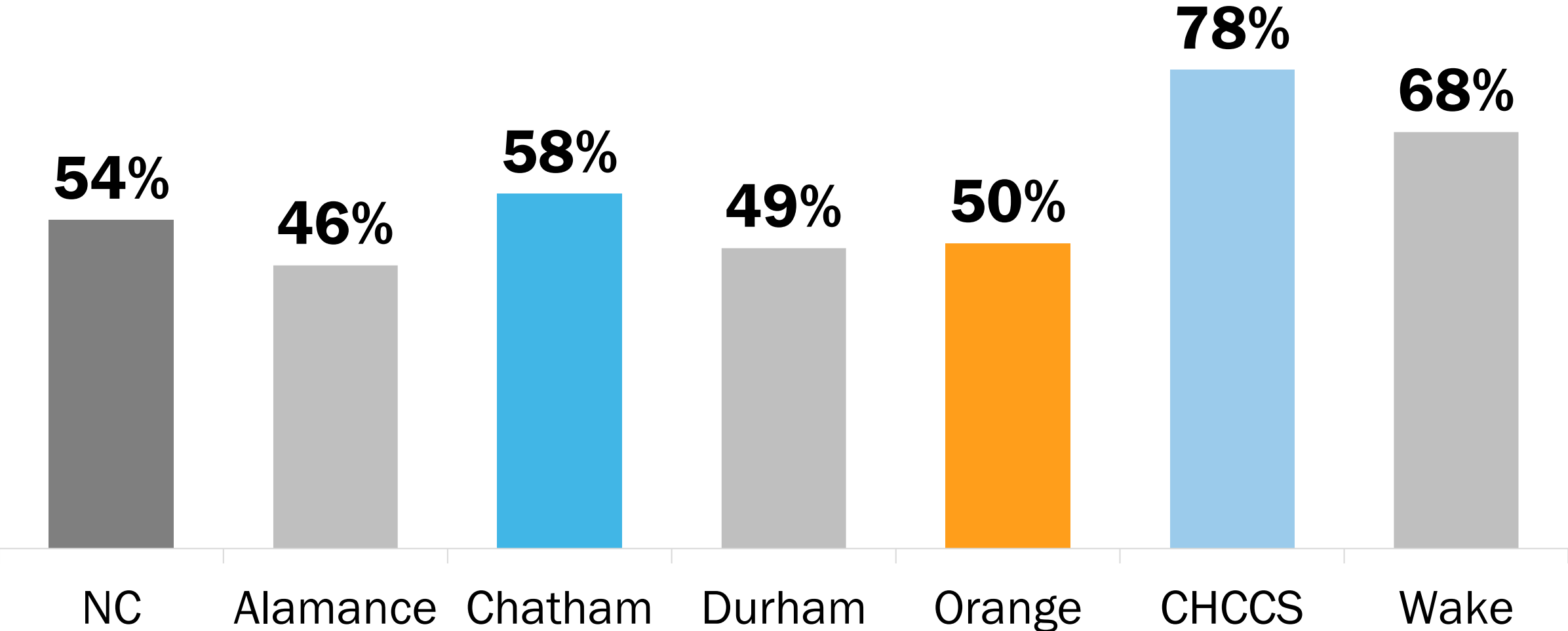
# Percent of all Students Meeting all 4 ACT Subtest Benchmarks (English, Math, Reading, Science)

AY2025



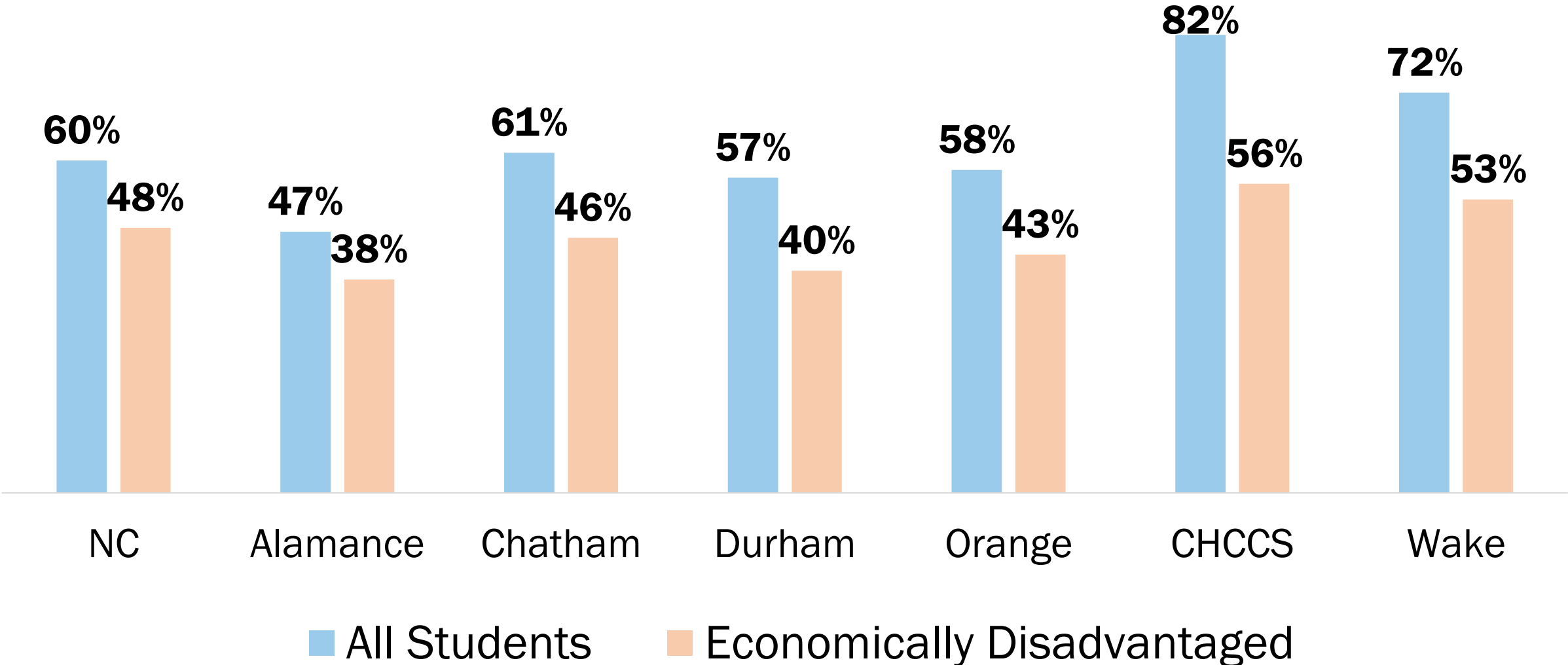
# Percent of Students Earning ACT Composite of 17 (UNC-system minimum)

AY2025



Source: NC Department of Public Instruction

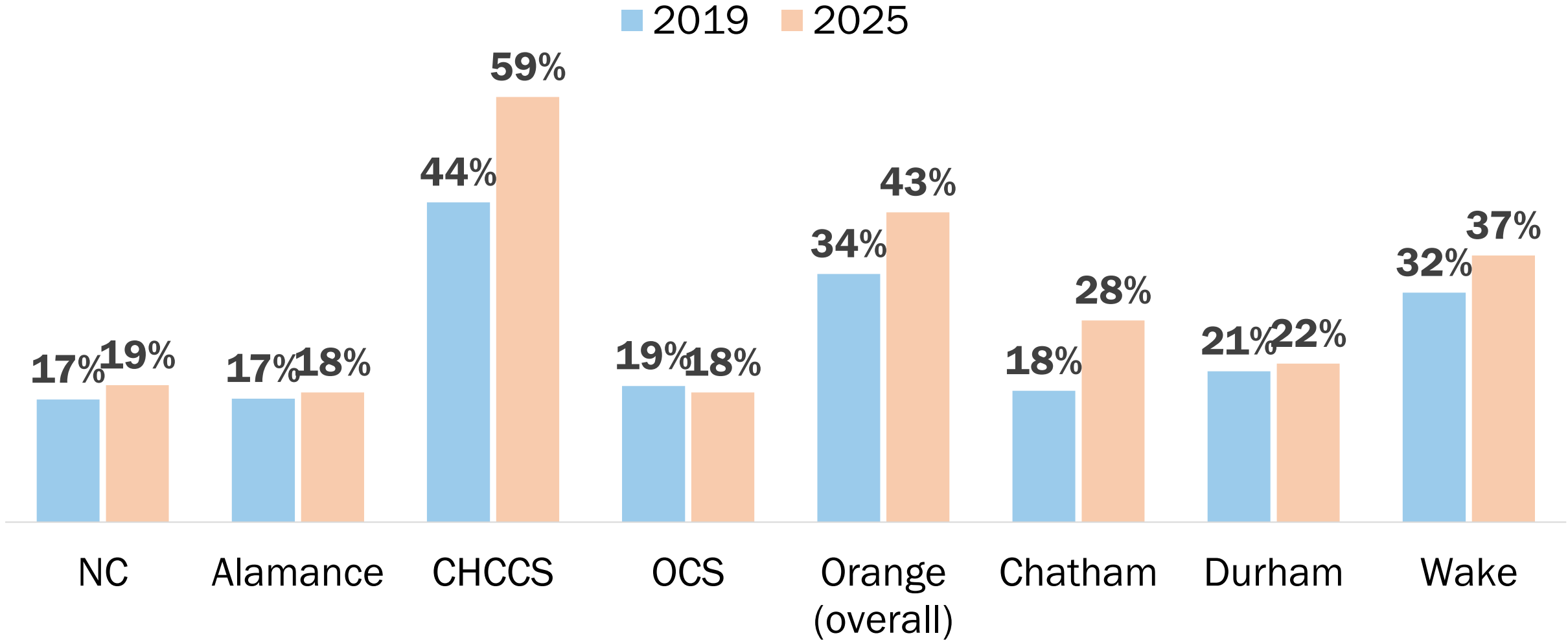
# Percent of Students Earning a Silver or Higher ("Career-Ready") ACT WorkKeys Score, AY2025



Source: NC Department of Public Instruction

# AP Participation

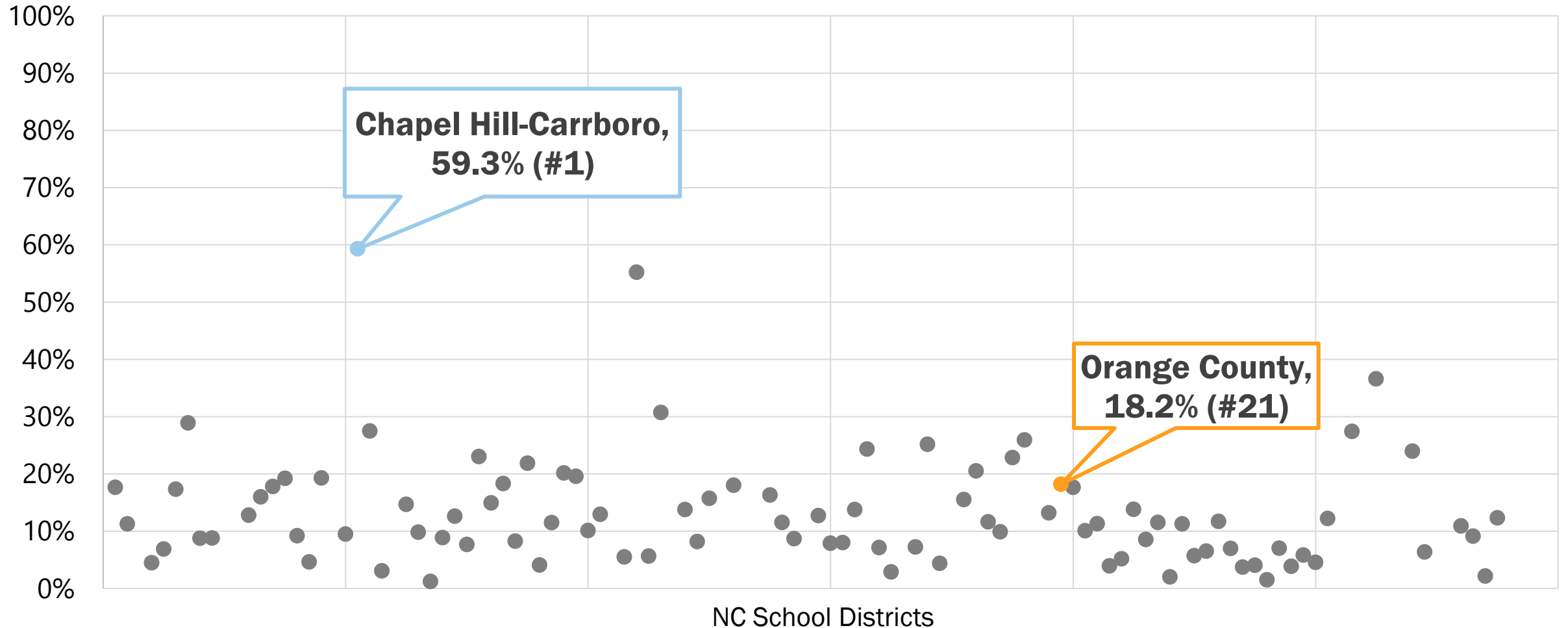
Percent of high school students enrolled in Advanced Placement (AP) courses, AY2019 vs. AY2025



Source: NC Department of Public Instruction

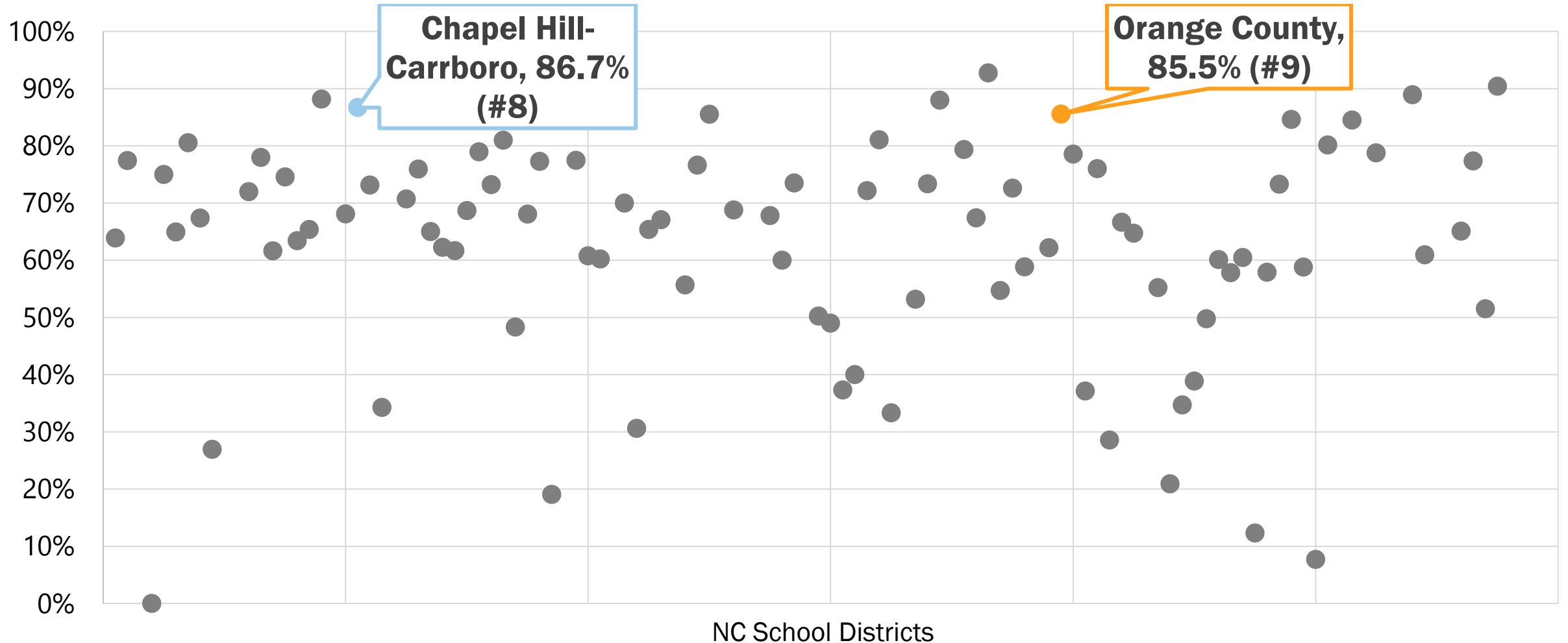
# NC School Districts' AP Exam Participation

Percent of high school students in each district taking AP exams, AY2025

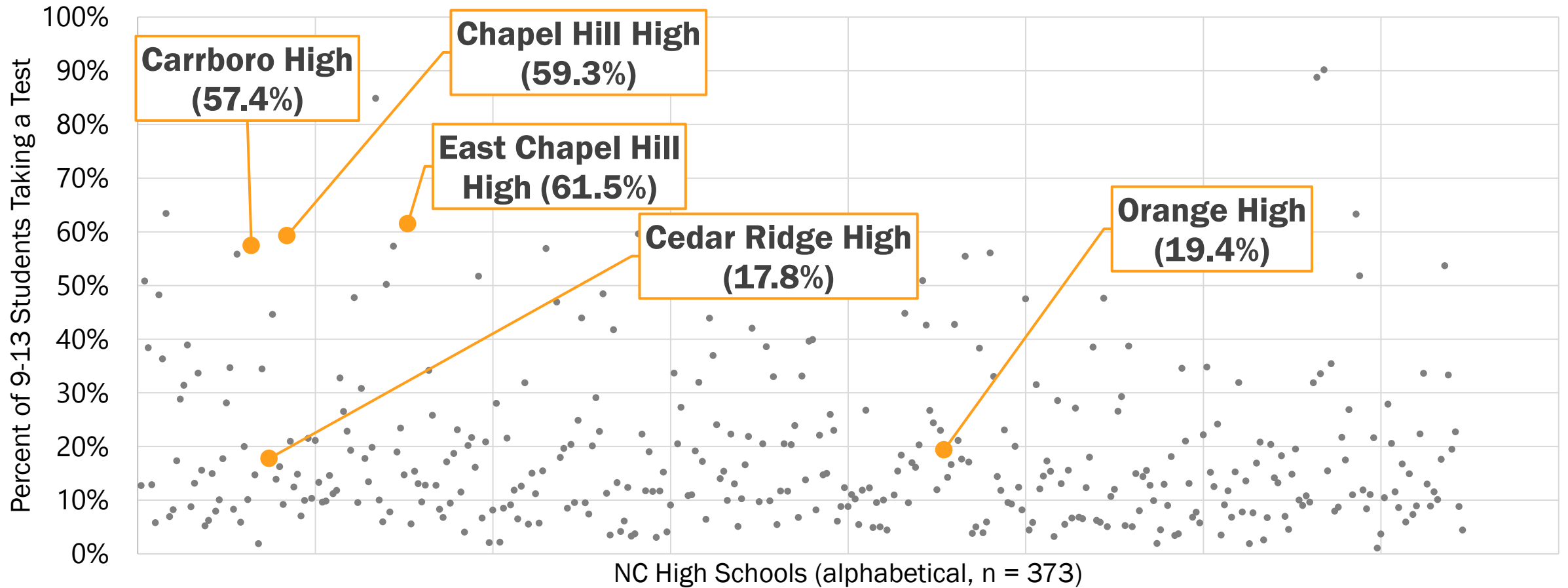


# NC School Districts' AP Exam Performance

Percent of high school students in each district scoring a 3 or higher on AP Exams, AY2025

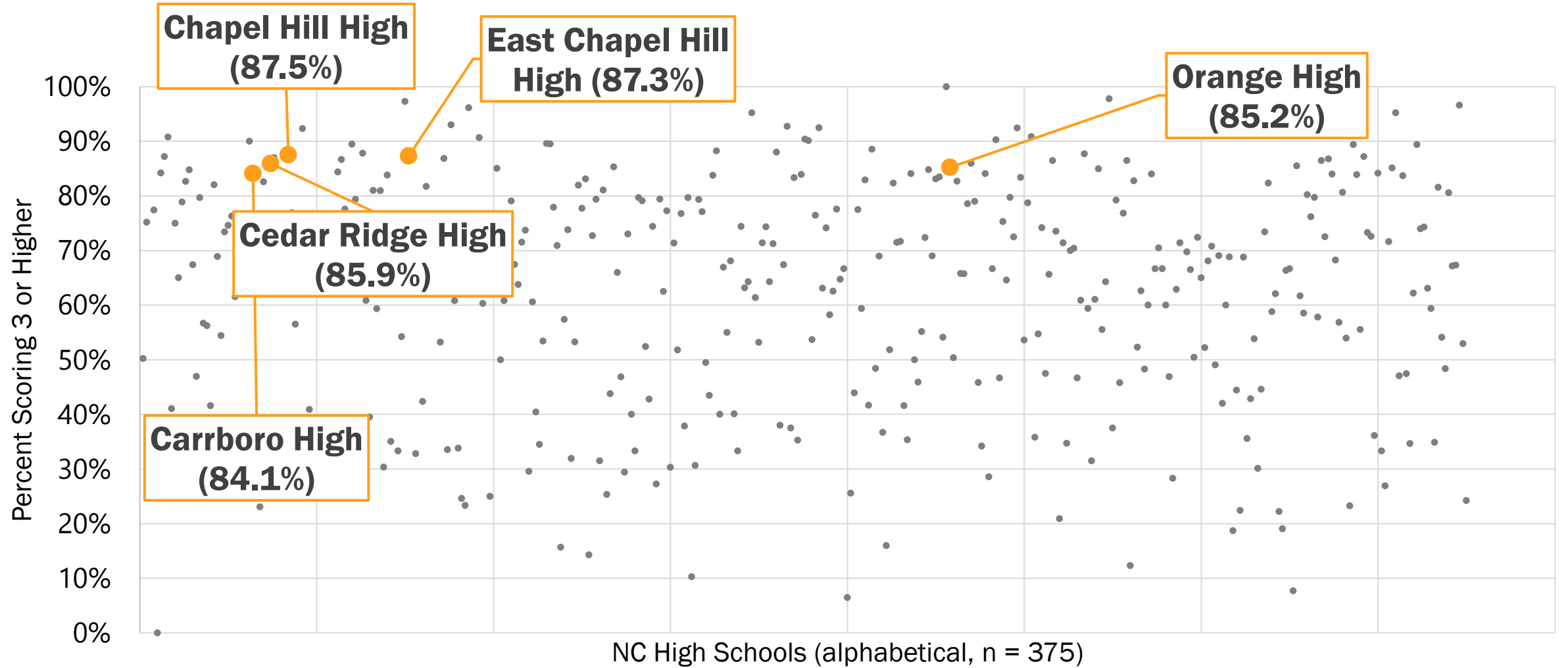


# NC High Schools by % of 9<sup>th</sup>-13<sup>th</sup> Graders Taking an AP Test



• All NC High Schools      • Orange County Schools

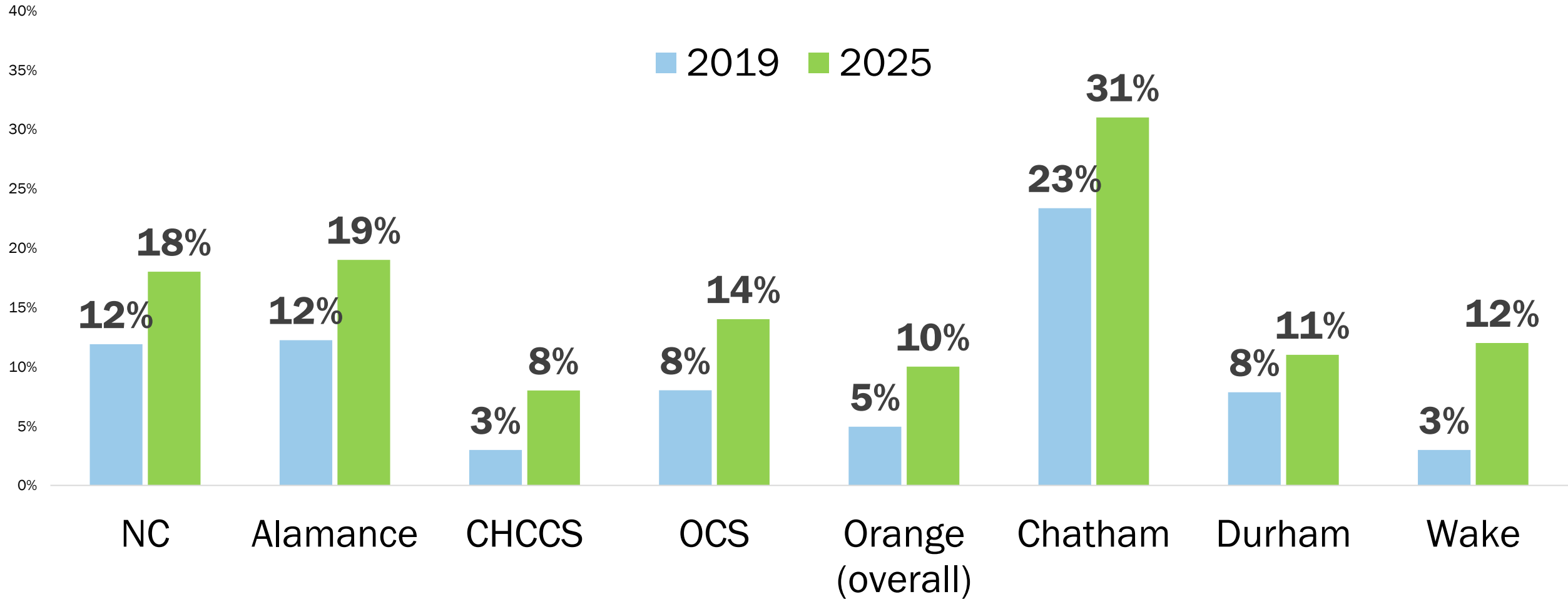
# NC High Schools by % of 9<sup>th</sup>-13<sup>th</sup> Graders Scoring 3+ on AP Exams



• All NC High Schools    • Orange County Schools

# Participation in Career-and-College Promise

Percent of high school students enrolled in Career & College Promise, North Carolina's dual enrollment program for high school students, AY2019 vs. AY2025



# **Education: Postsecondary Intent**

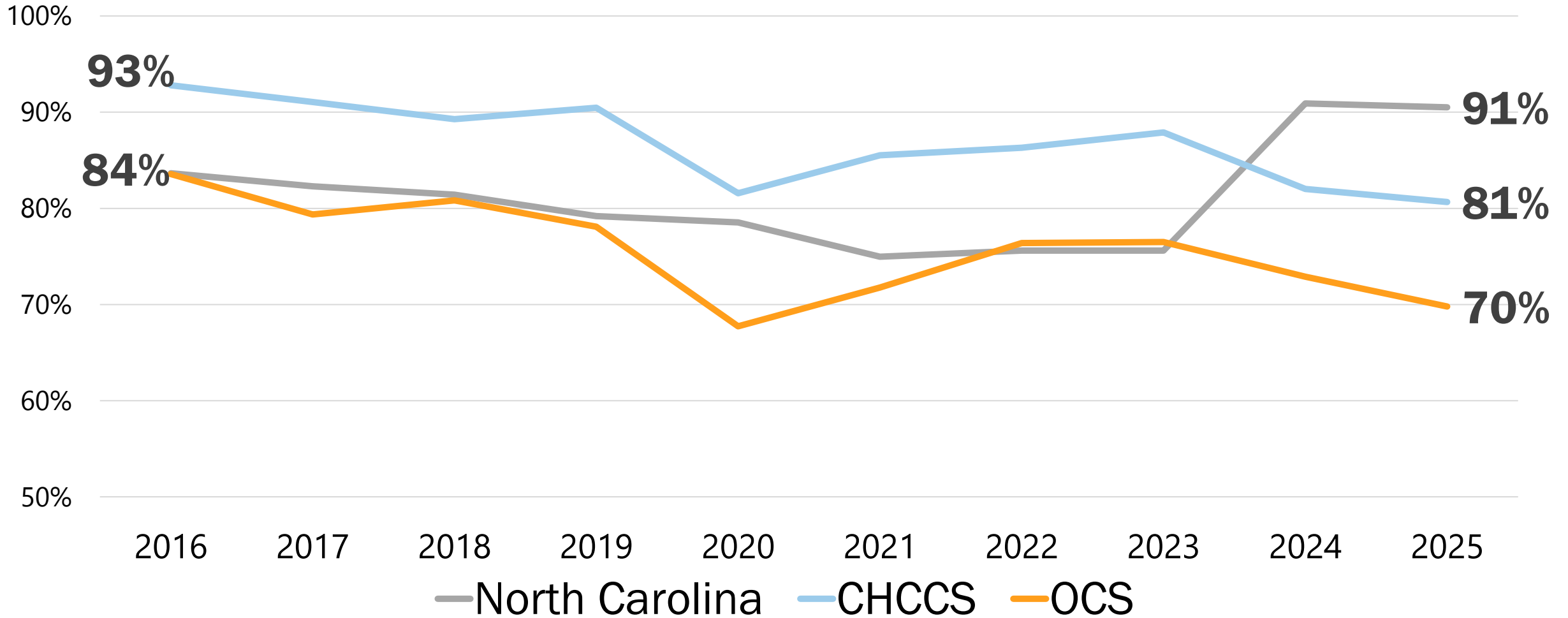
# Postsecondary Intentions

Percent of high school graduates who reported intentions to enroll in postsecondary education, AY2025



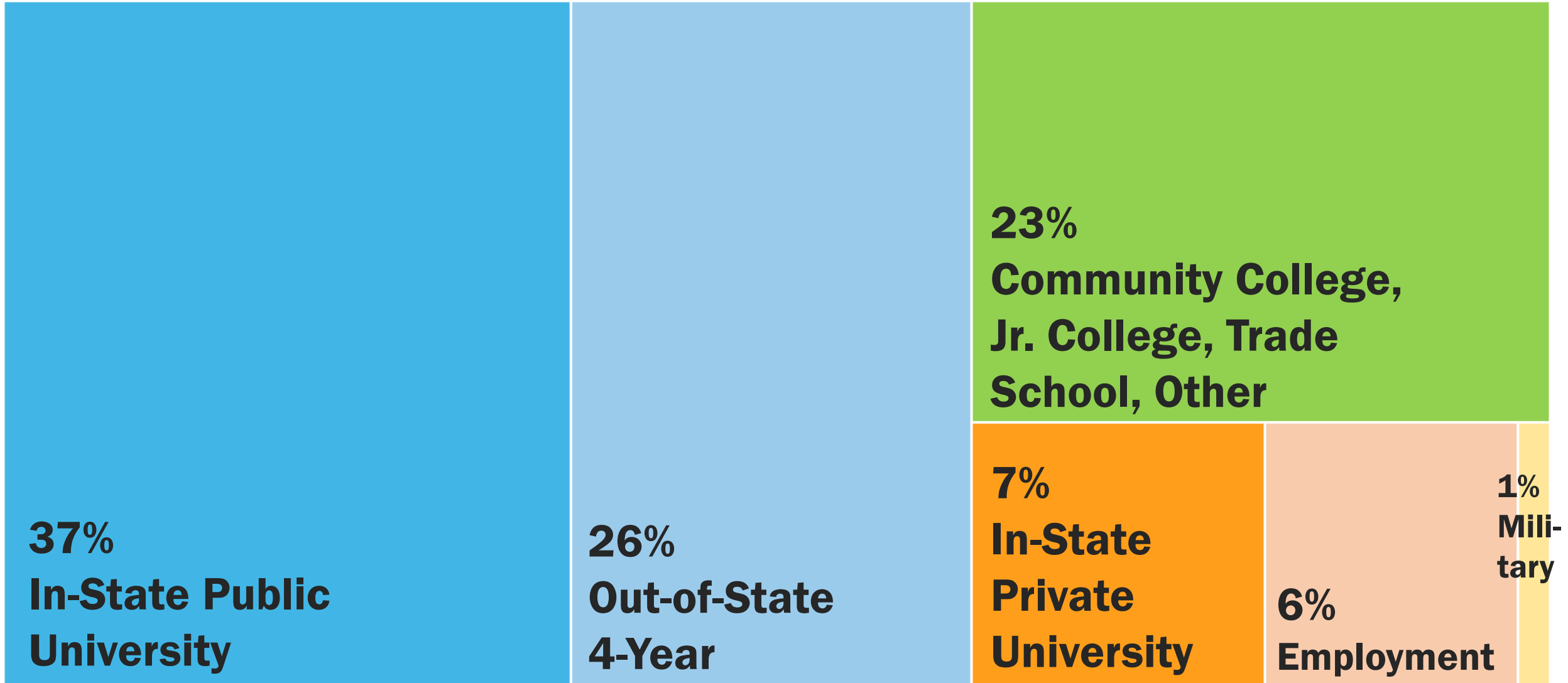
# Postsecondary Intentions

Percent of high school graduates who reported intentions to enroll in postsecondary education, AY2011 to AY2025



# CHCCS Postsecondary Intentions

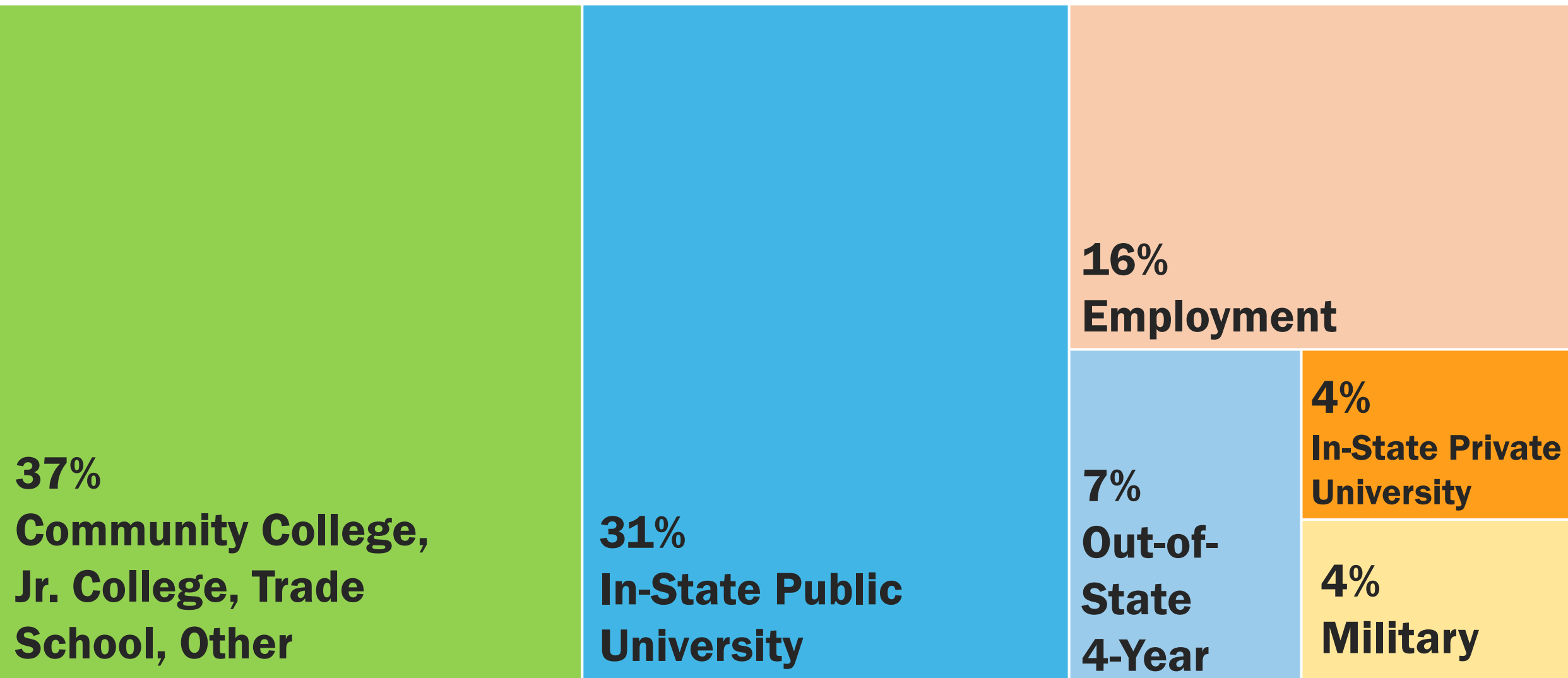
Breakdown of Chapel Hill Carrboro City Schools seniors' reported plans post-graduation, AY2025



Source: NC Department of Public Instruction

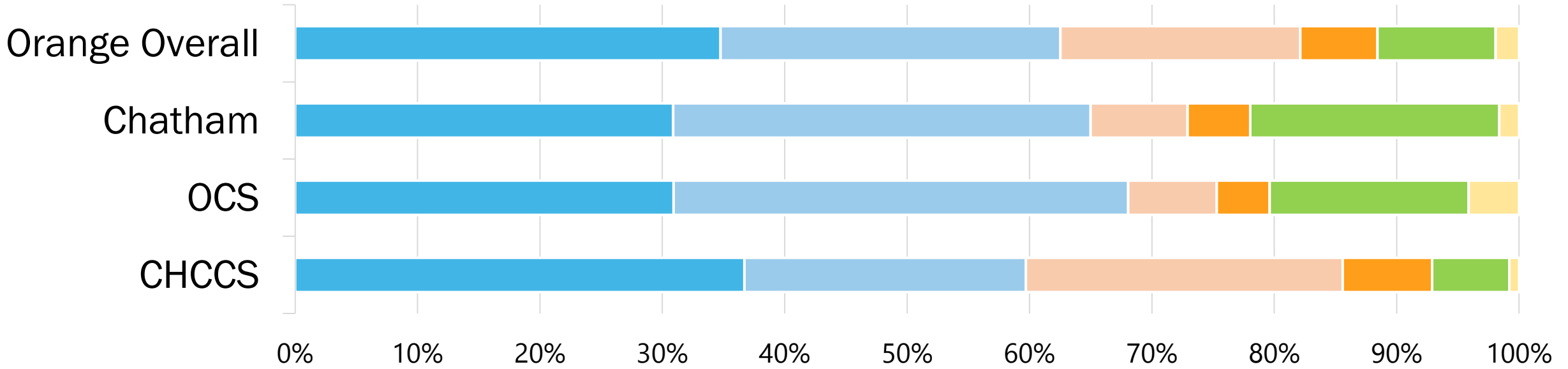
# OCS Postsecondary Intentions

Breakdown of Orange County Schools seniors' reported plans post-graduation, AY2025



Source: NC Department of Public Instruction

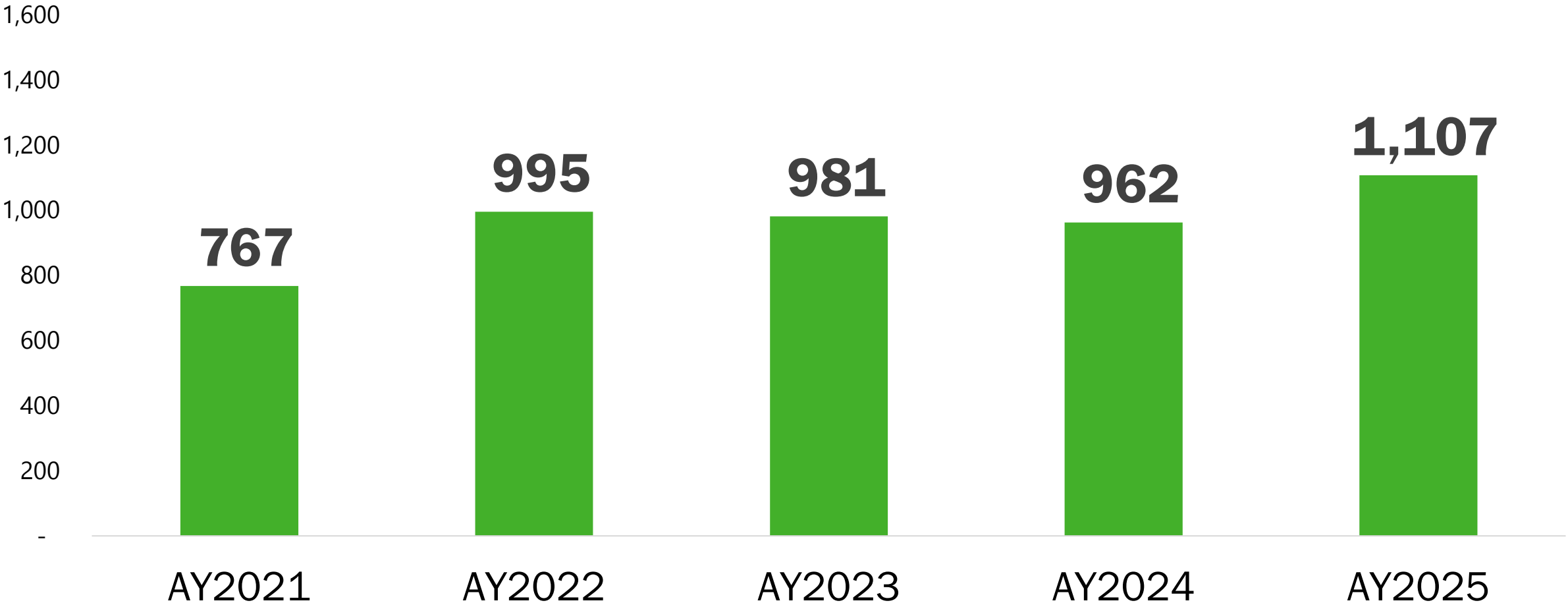
# High School Seniors' Postsecondary Intentions (AY2025)



- In-State Public University
- Community College In State, Junior College, Trade School or Undecided/Other
- Out-of-State 4 Year
- In-State Private University
- Employment
- Military

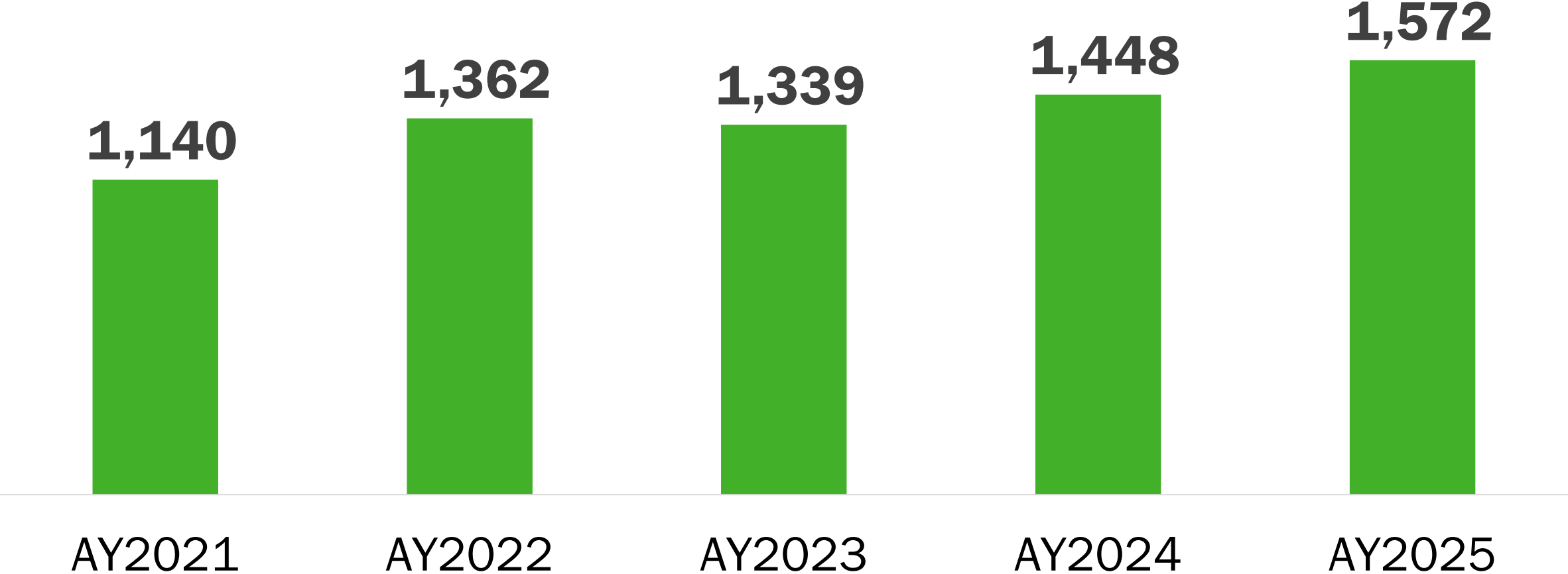
**Education: Durham Tech**

# Orange County Resident Enrollment in Durham Tech - Continuing Education Students



Source: Durham Tech

# Orange County Resident Enrollment in Durham Tech - Curriculum Students

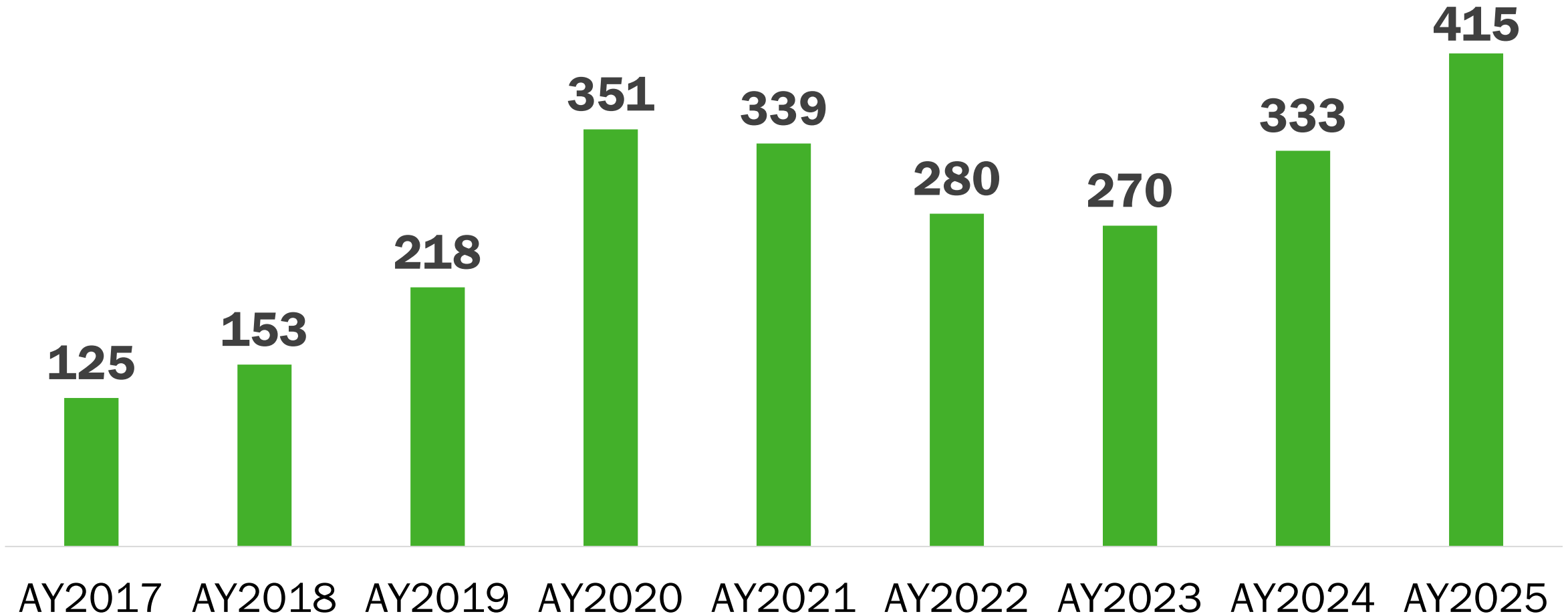


Source: Durham Tech

# 2024 Durham Tech Licensure Pass Rate

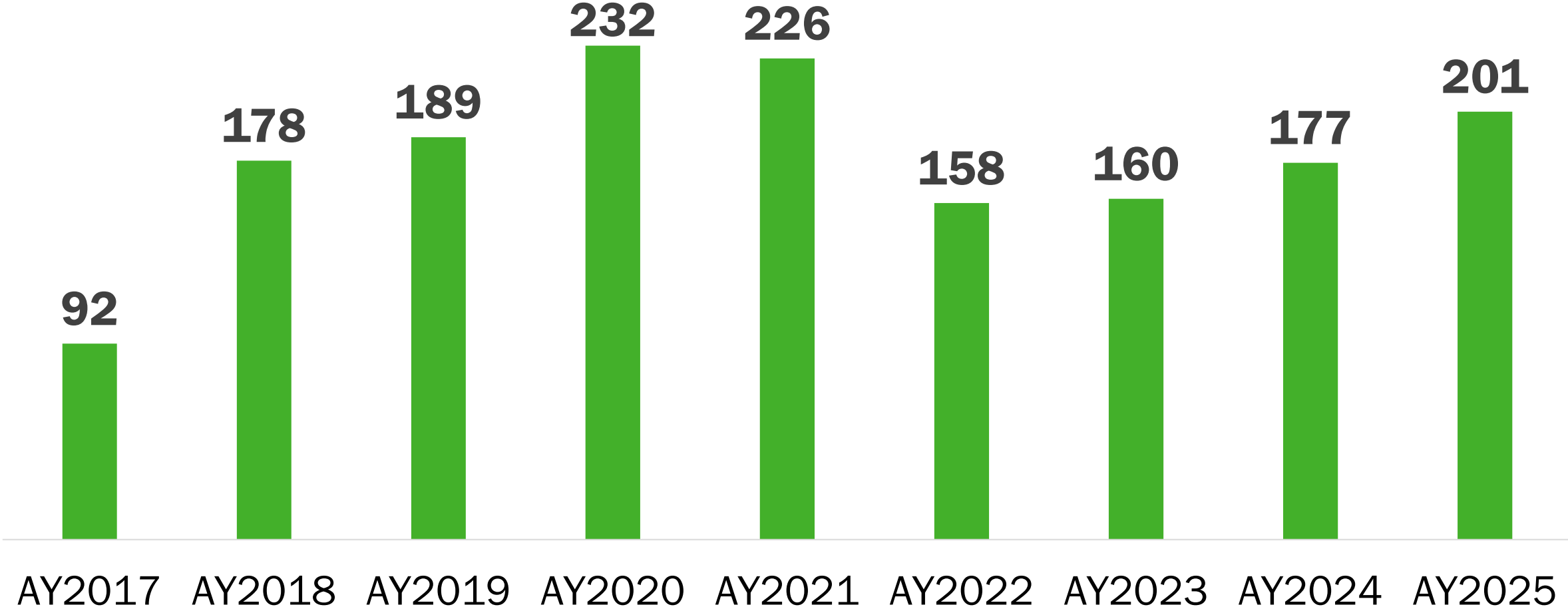


# Dual Enrolled High School Students Taking Classes at Durham Tech (Orange County Residents)



# Orange Promise Students Taking Classes at Durham Tech

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



Source: Durham Tech

**Environment**

# Public Recycling Per Capita

FY 2023

NC Rank	County	Ibs/Person
1	Craven County	188
3	Orange County	161
13	Durham County	118
24	Alamance County	96
25	Lee County	91
26	Wake County	88
33	Chatham County	77

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

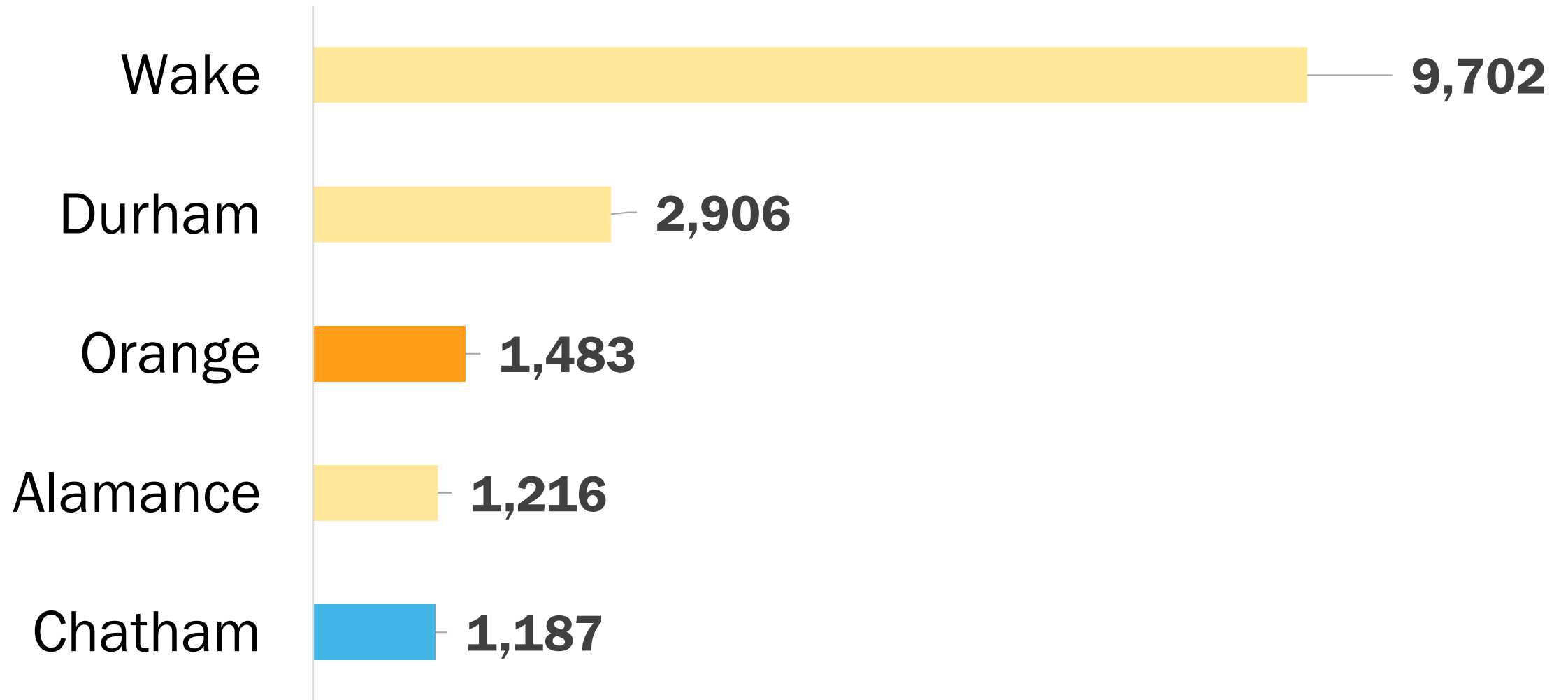
# Household Recyclables Per Capita

FY 2023

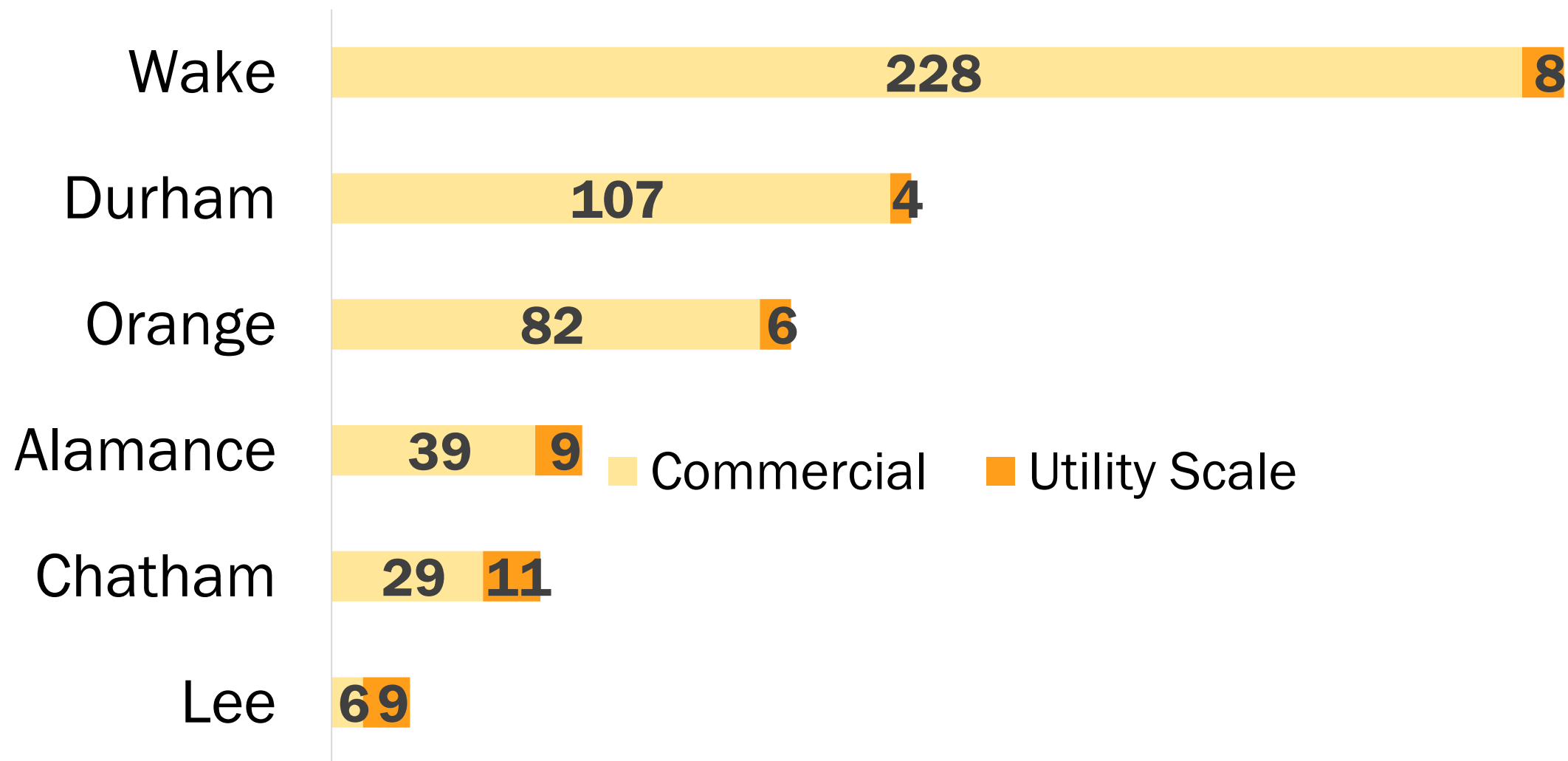
NC Rank	County	Ibs/Person
1	Brunswick County	329
14	Orange County	195
24	Chatham County	135
29	Durham County	129
43	Lee County	110
44	Wake County	108
45	Alamance County	106

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

# Residential Solar Systems by County

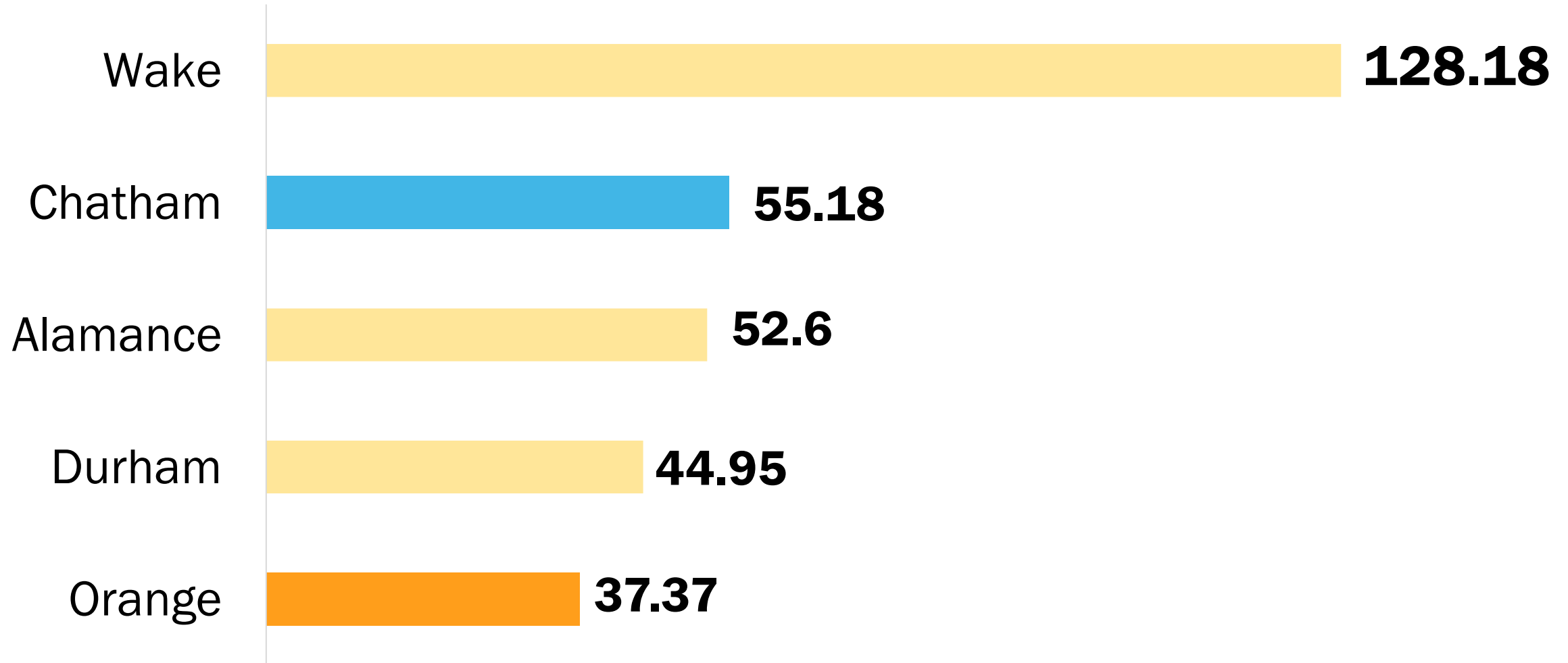


# Commercial and Utility Scale Solar Systems by County

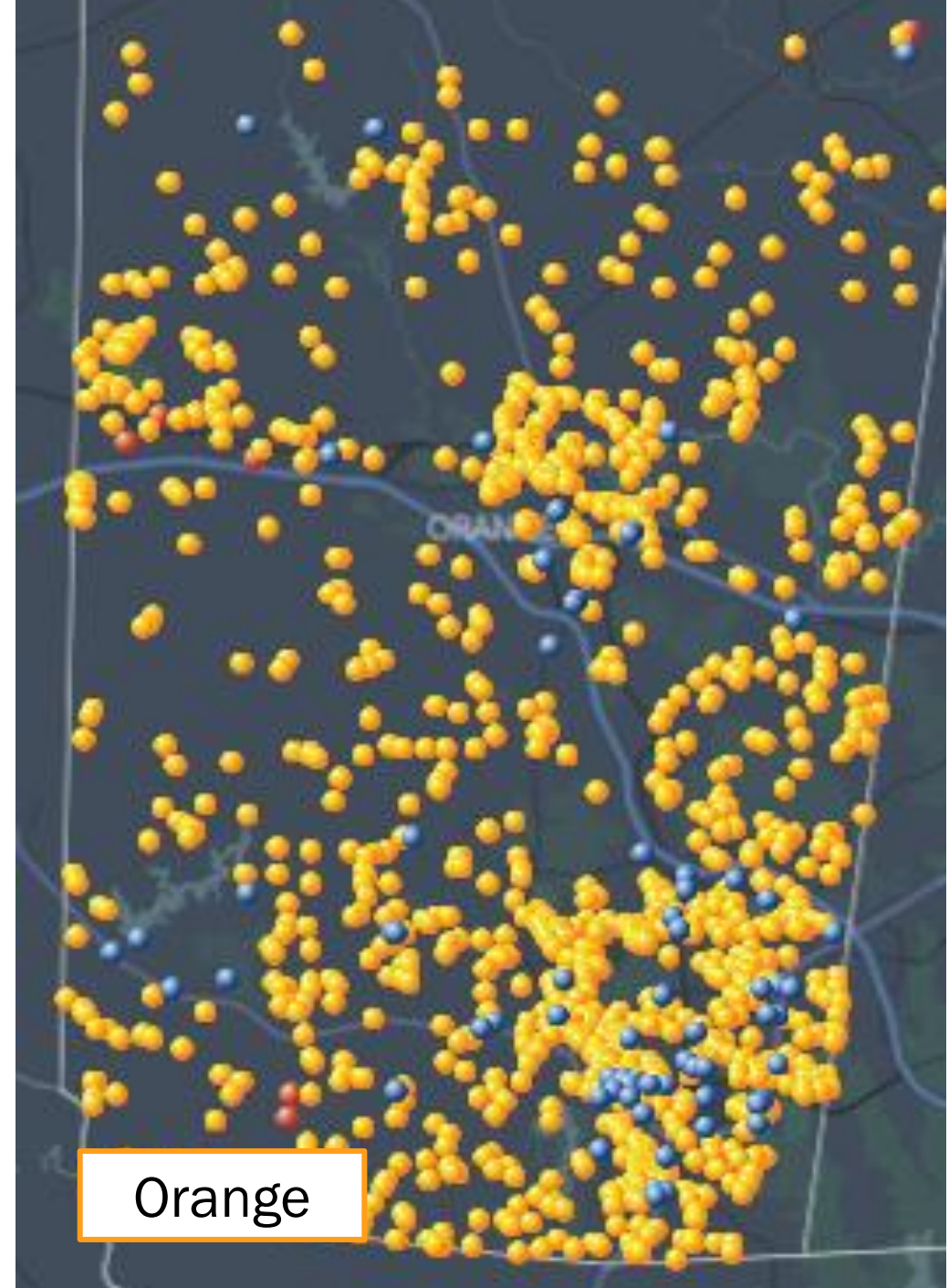
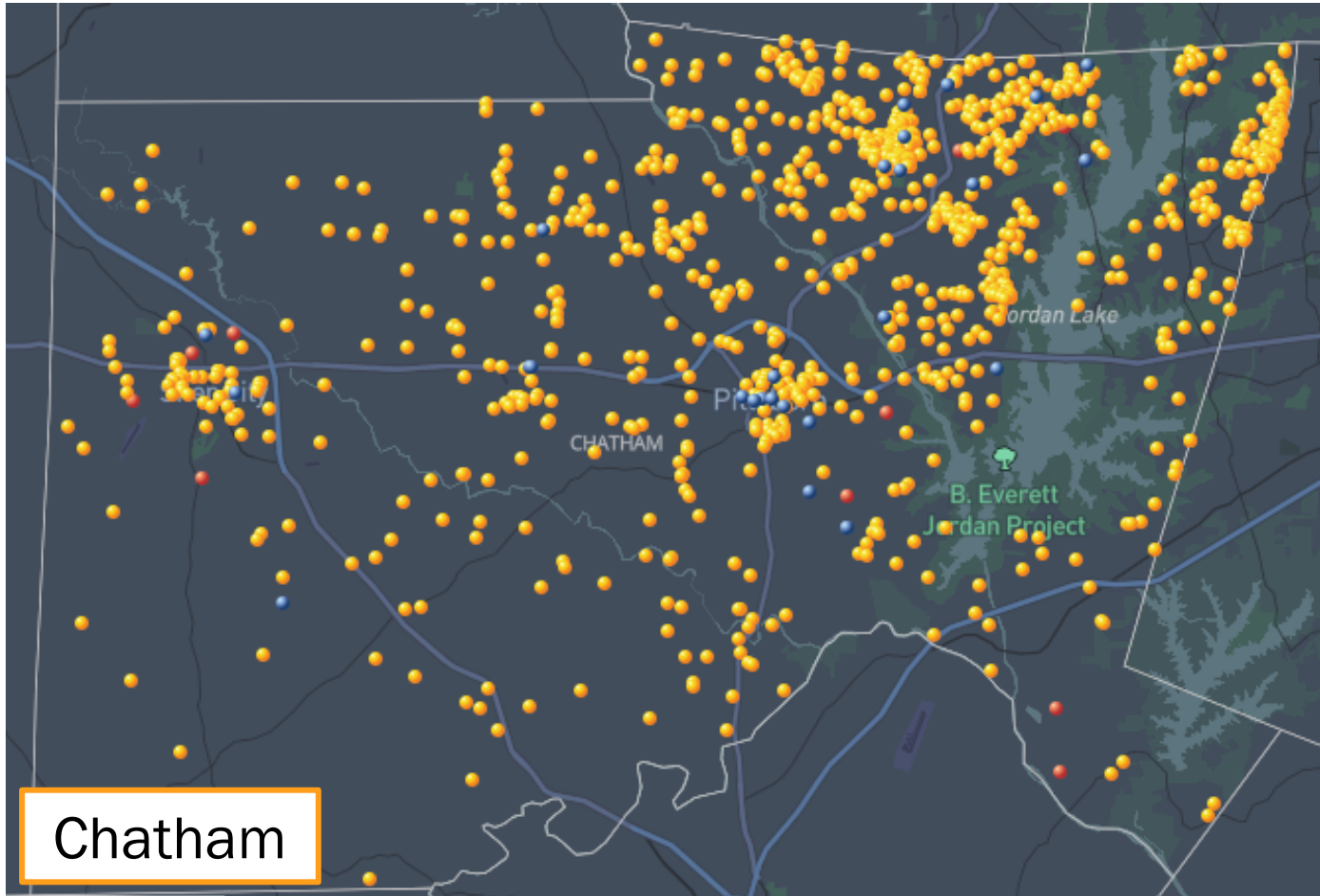


# County Solar Energy Capacity (megawatts)

Total installed solar energy capacity by county, 2025

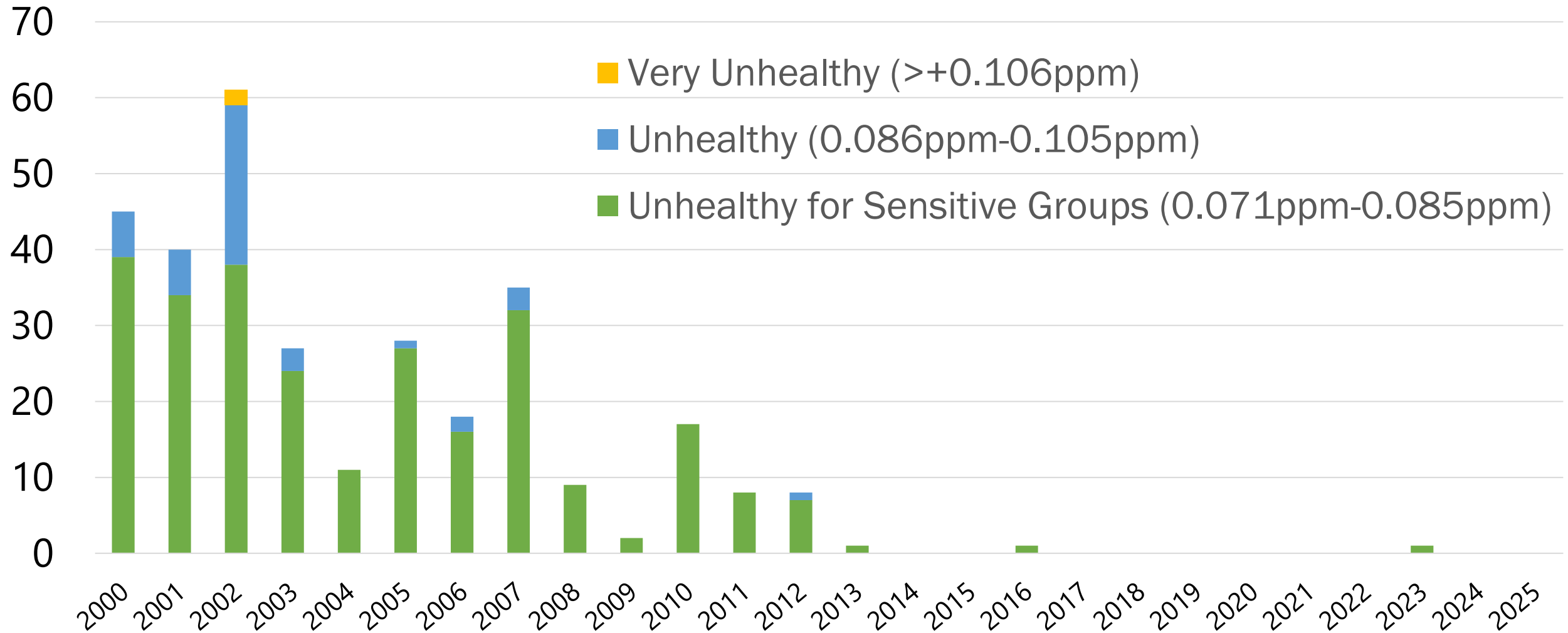


# Regional Solar Installations

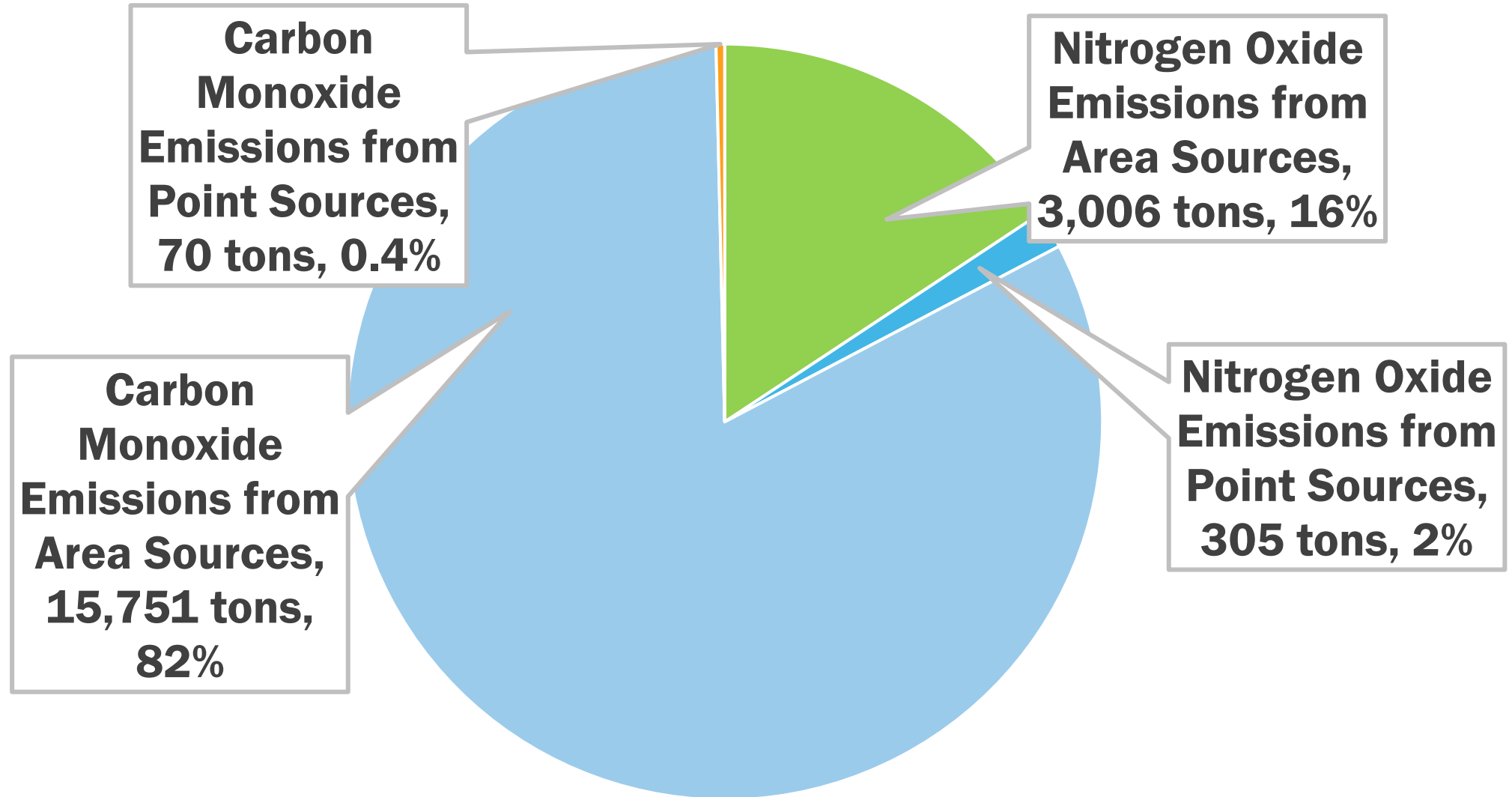


# Ozone Exceedance Days: Durham-Chapel Hill

Number of days 8-hour ozone daily max exceeded 0.070ppm, 2005 through 2025

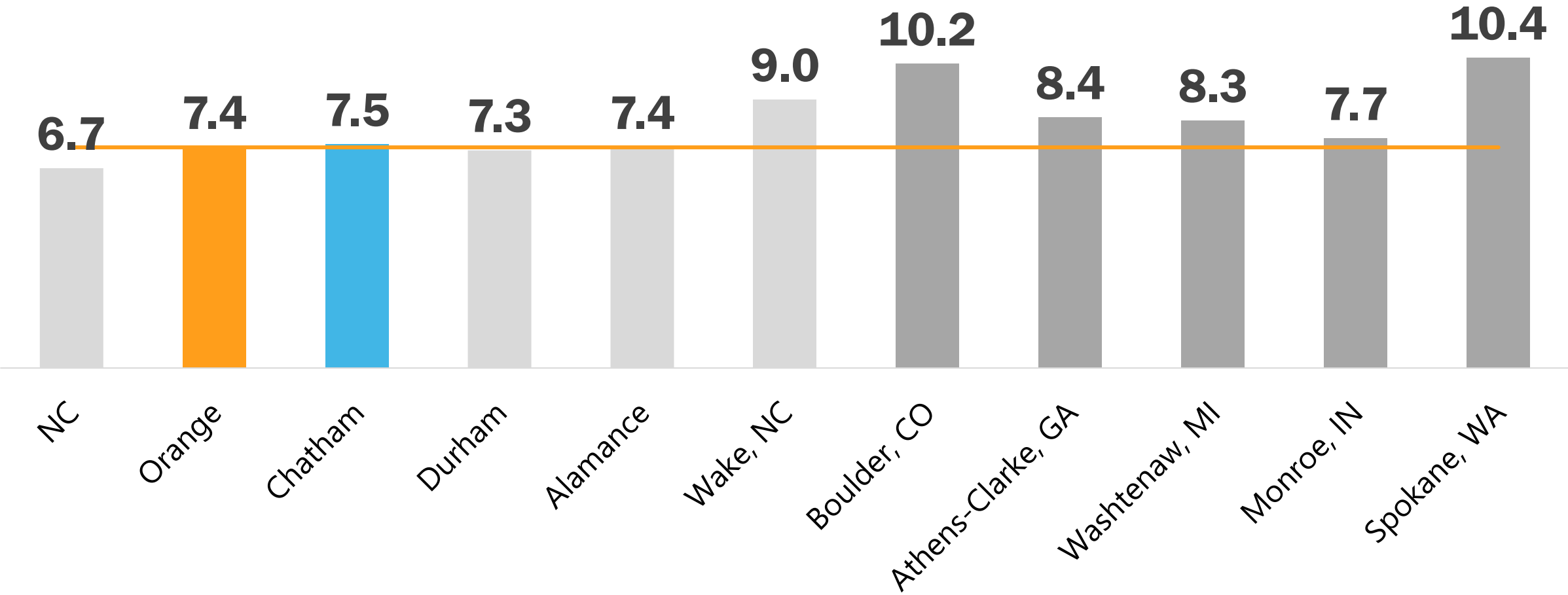


# Emissions: Orange County, NC



# Air Pollution: Particulate Matter

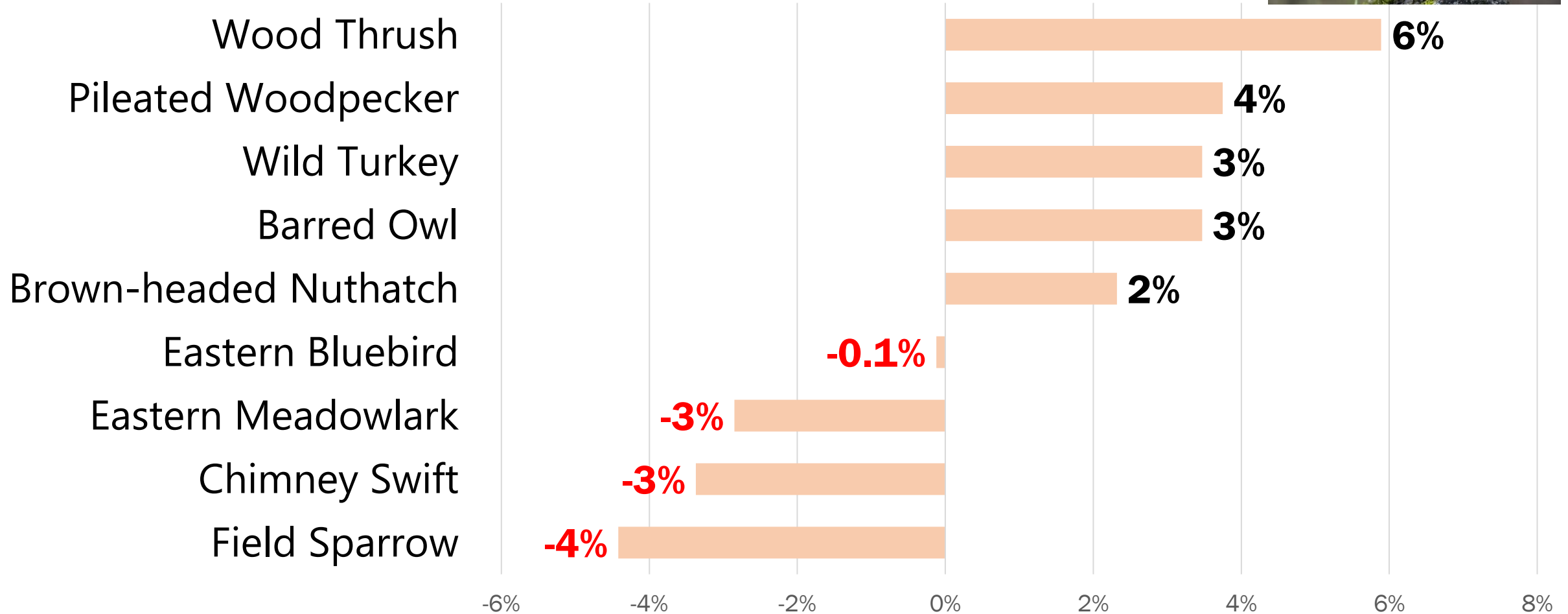
Average daily density of fine particulate matter in micrograms per cubic meter (PM2.5)



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

# Bird Population Change, 1999-2025

Bird population trends in Orange, Chatham, and Durham Counties



Source: Mini Bird Breeding Survey