

NC Demographic Trends Through 2035

House Select Committee on Strategic
Transportation Planning and Long Term Funding
Solutions

February 22, 2016

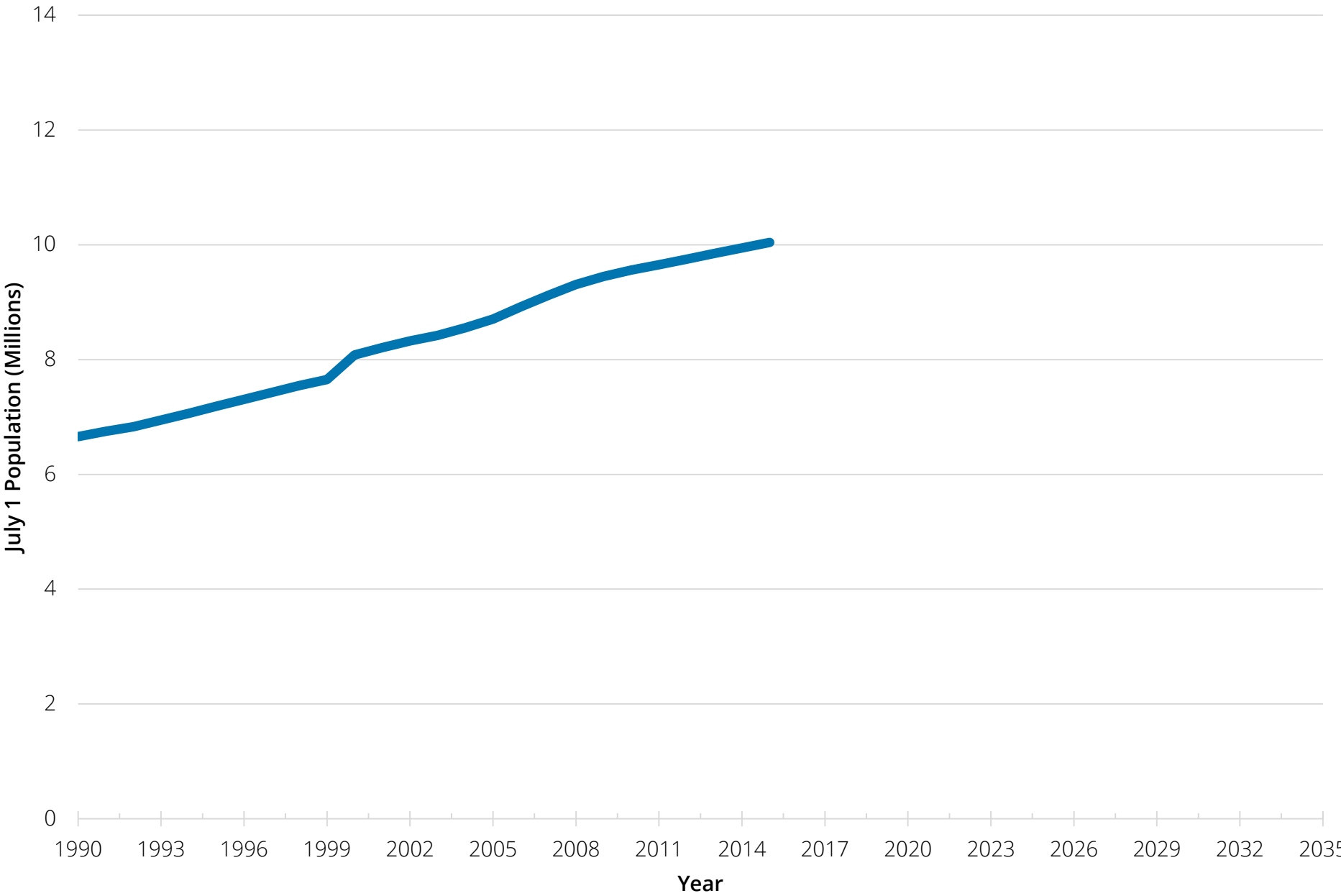
Rebecca Tippett, University of North Carolina



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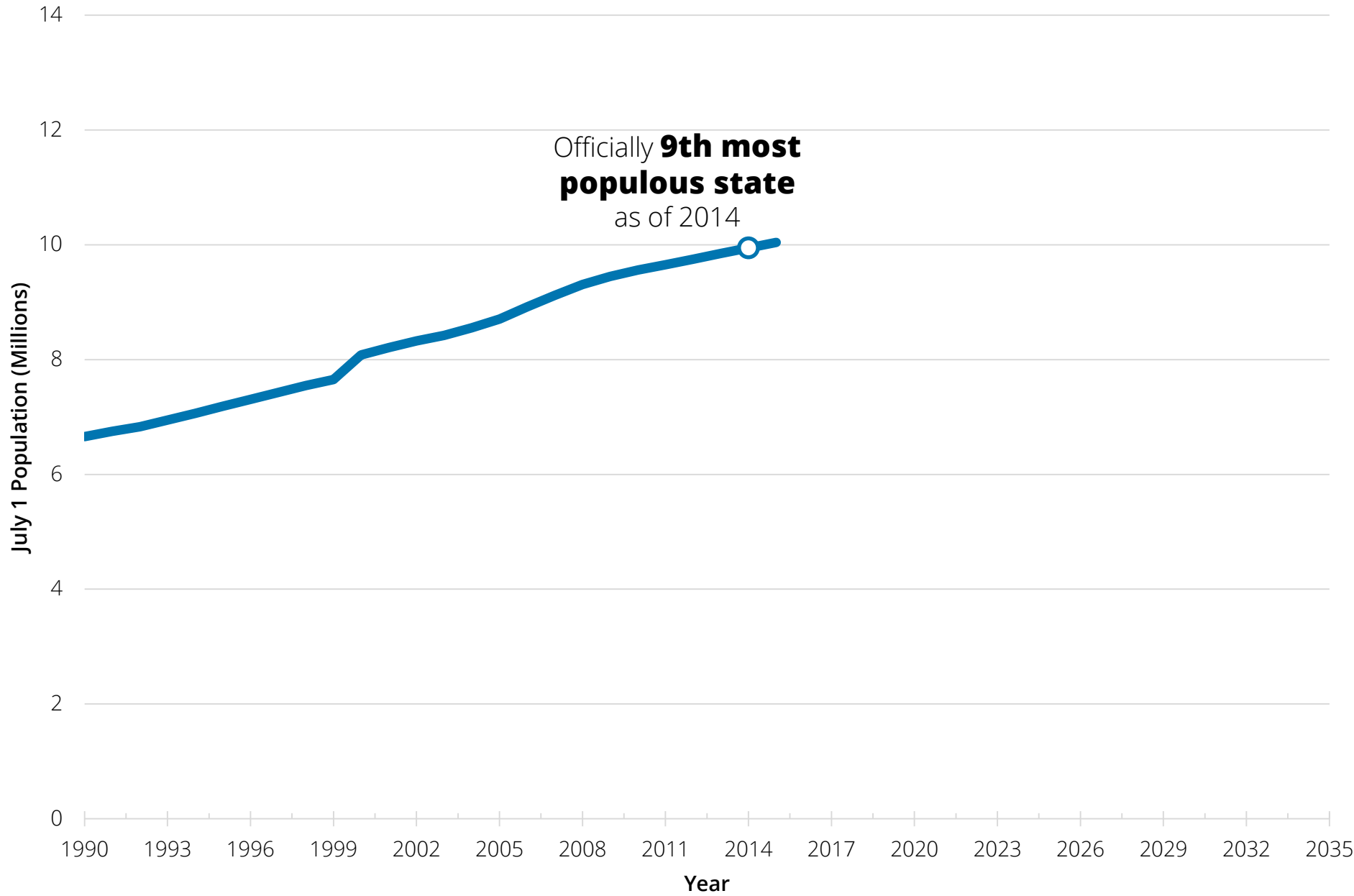
CAROLINA
DEMOGRAPHY

North Carolina's Total Population (July 1), 1990-2035



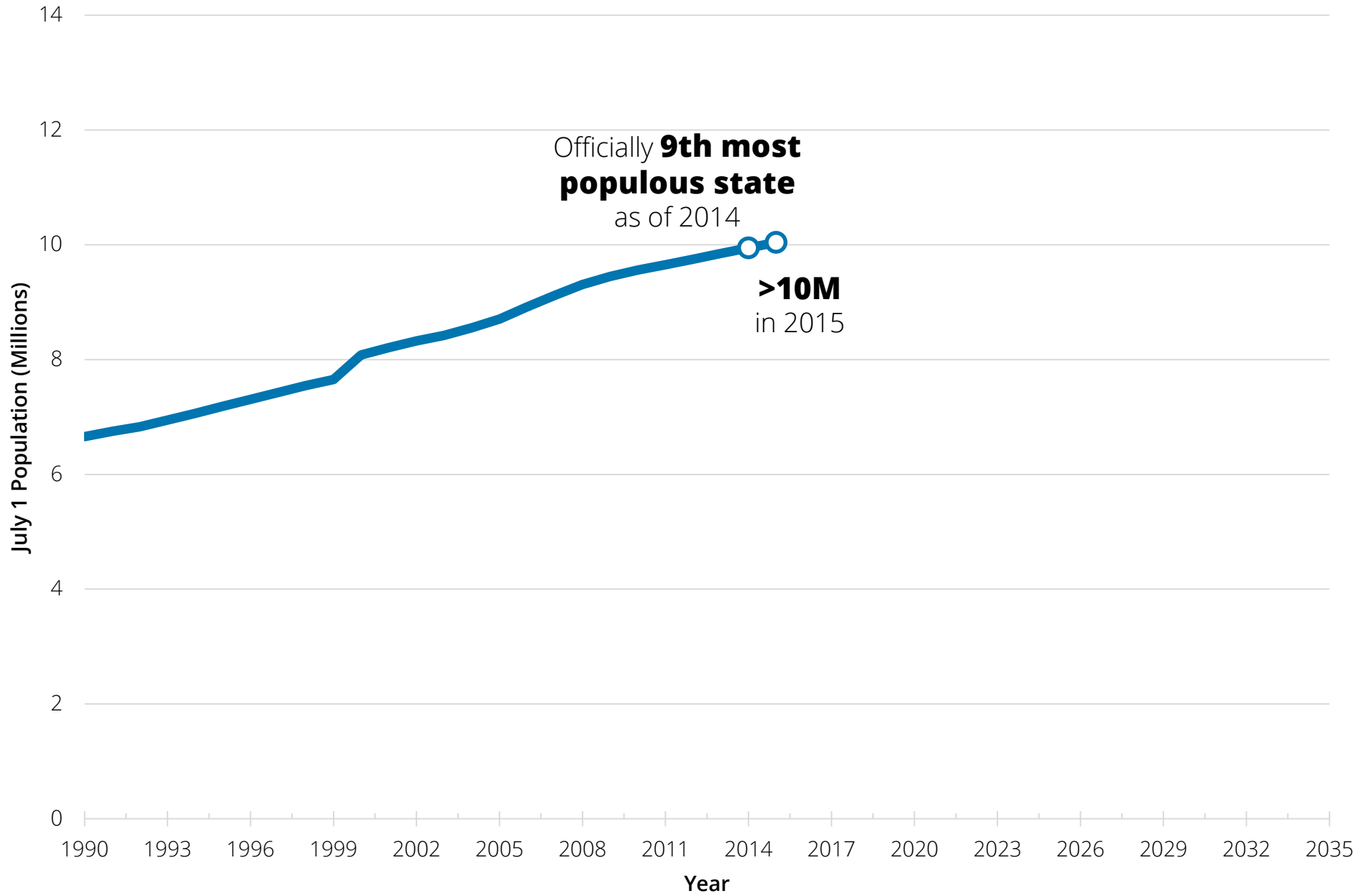
Data Source: U.S. Census Bureau Population Estimates, NCOSBM Projections

North Carolina's Total Population (July 1), 1990-2035



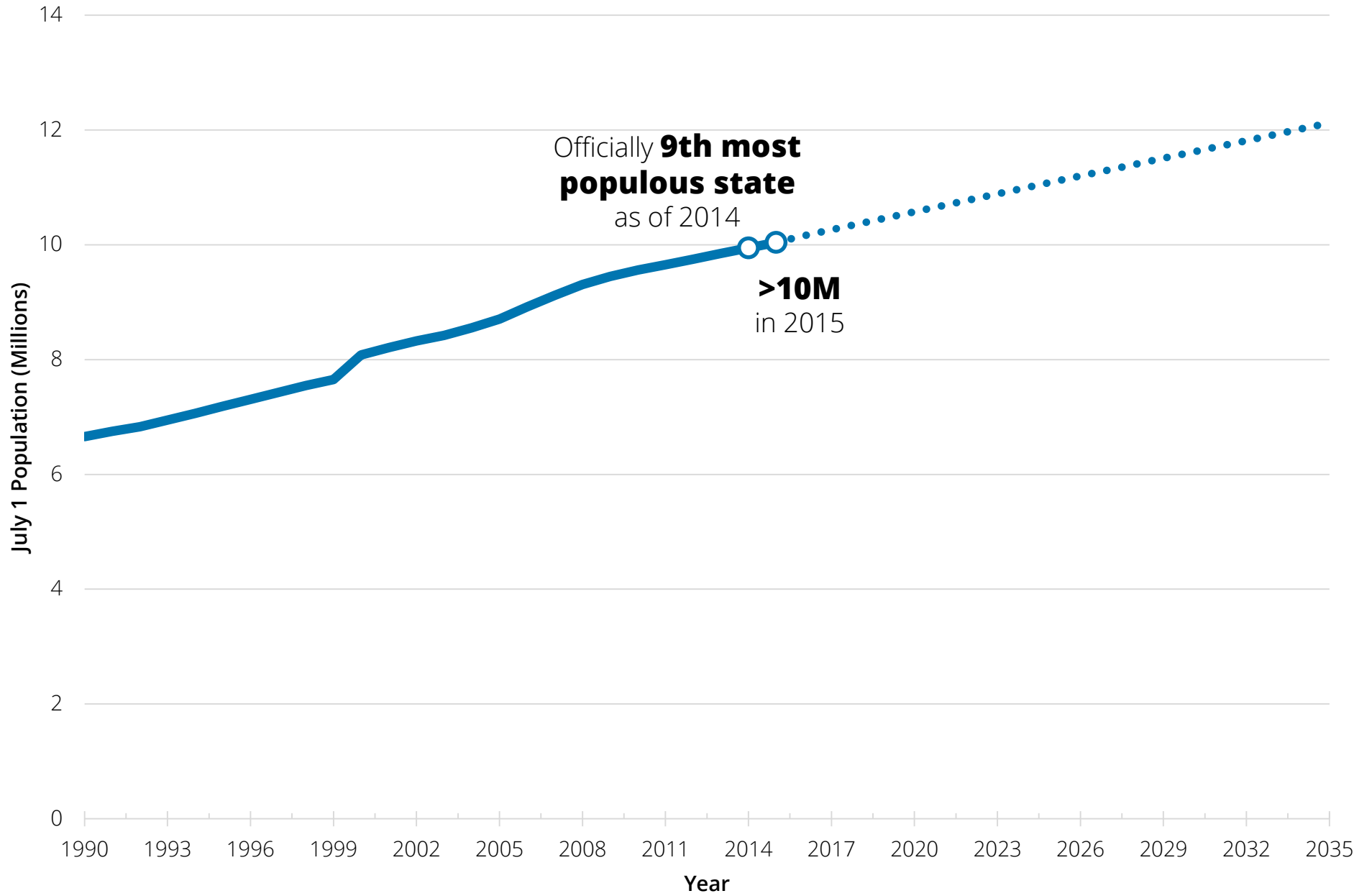
Data Source: U.S. Census Bureau

North Carolina's Total Population (July 1), 1990-2035



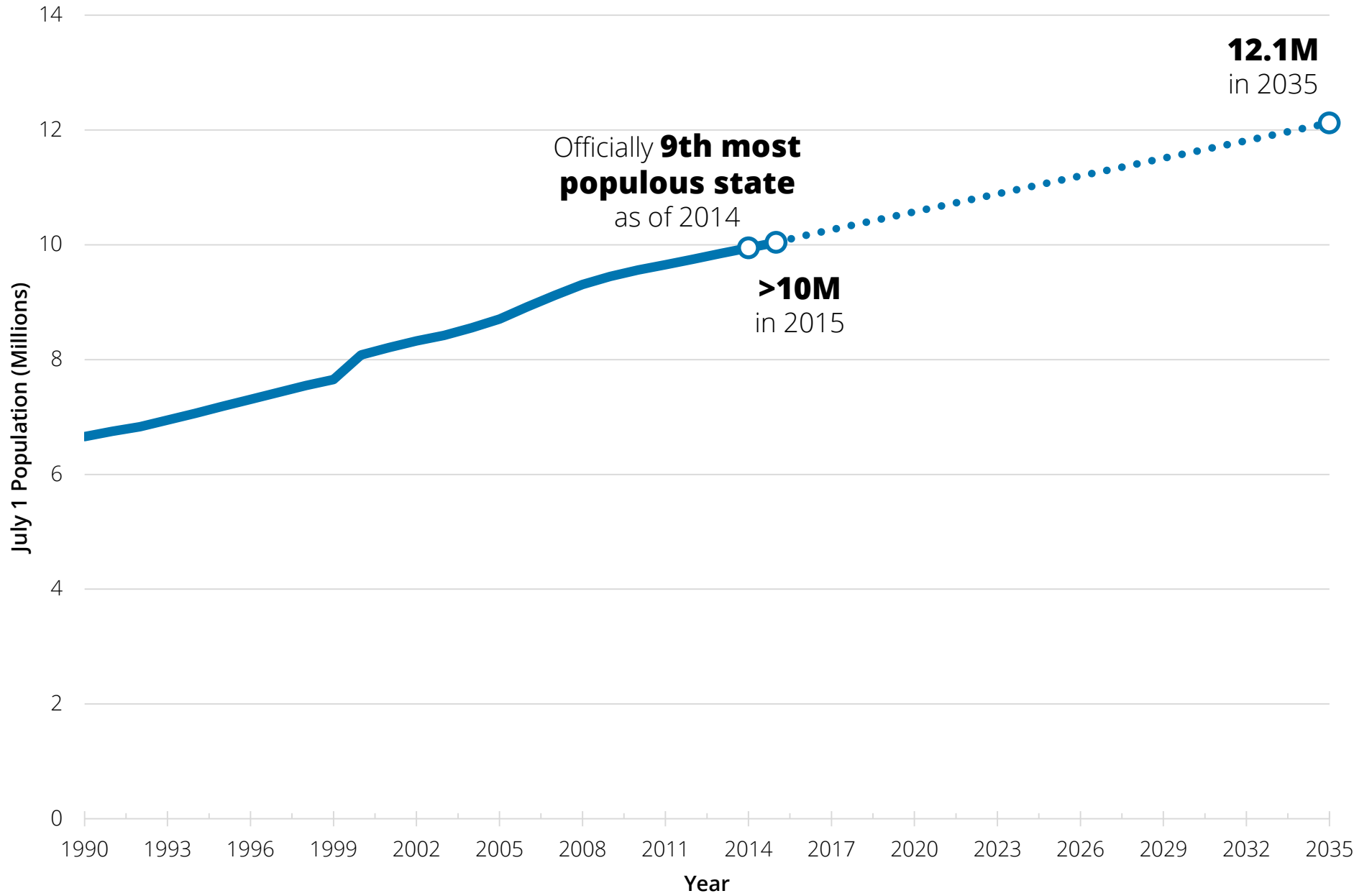
Data Source: U.S. Census Bureau

North Carolina's Total Population (July 1), 1990-2035



Data Sources: U.S. Census Bureau, NC OSBM

North Carolina's Total Population (July 1), 1990-2035



Data Sources: U.S. Census Bureau, NC OSBM

Urbanization

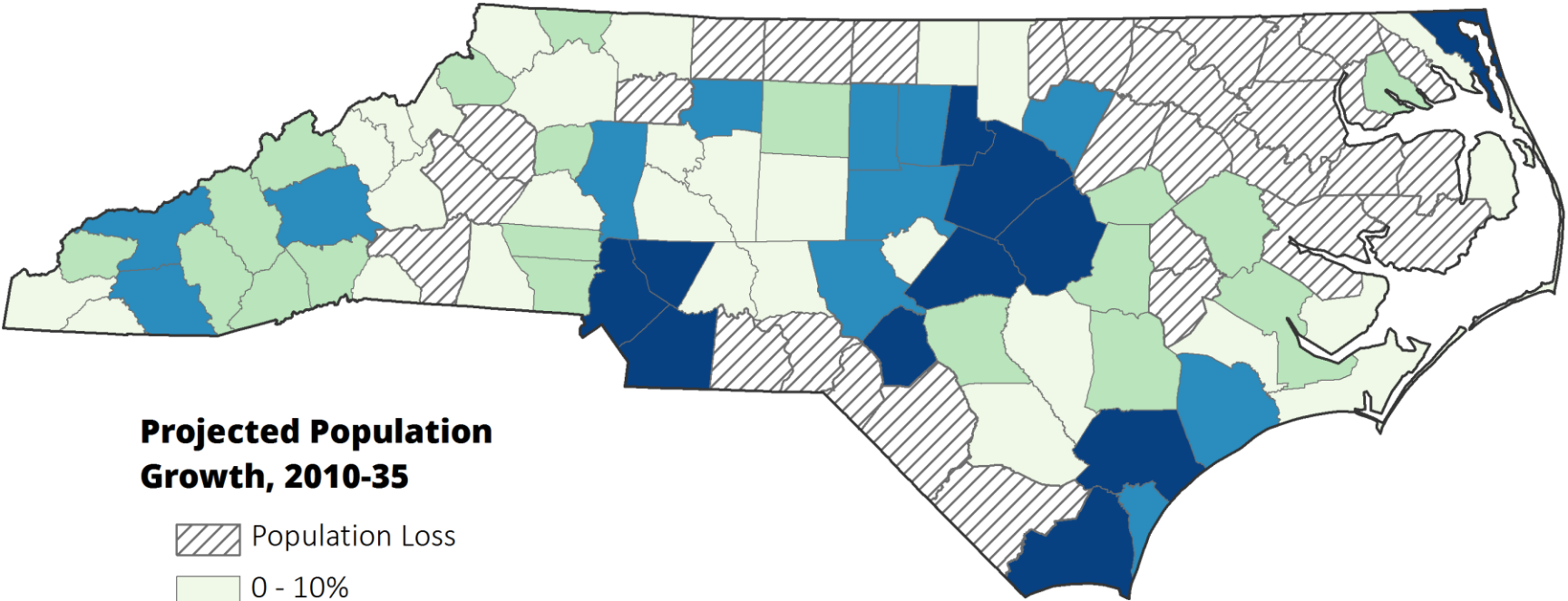
50% in 1990

vs.






66% in 2010

Population growth will be uneven across North Carolina

Projected population growth, 2010-2035

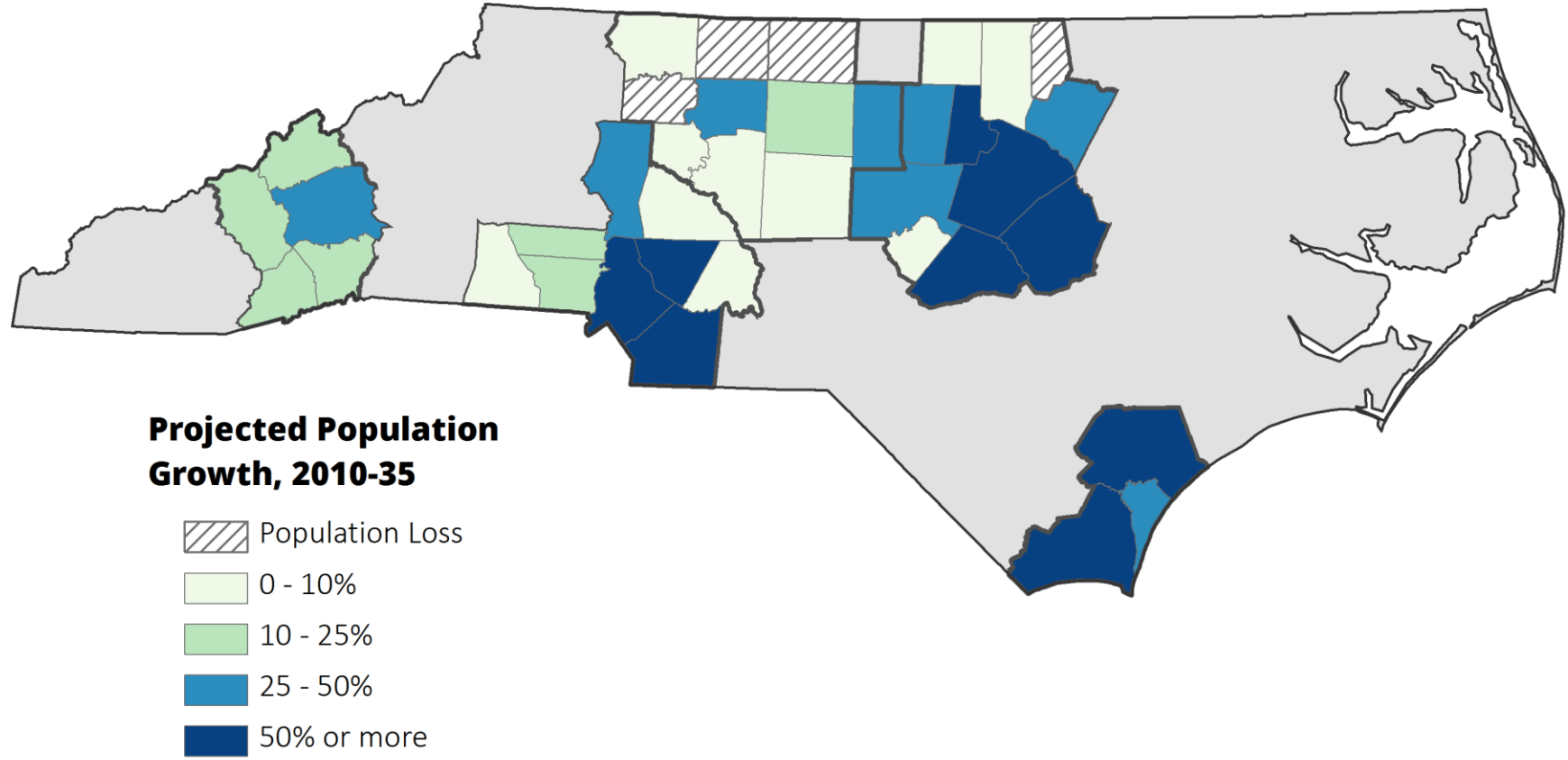


Projected Population Growth, 2010-35

-  Population Loss
-  0 - 10%
-  10 - 25%
-  25 - 50%
-  50% or more

Nearly all of the fastest growing counties are in major metro areas

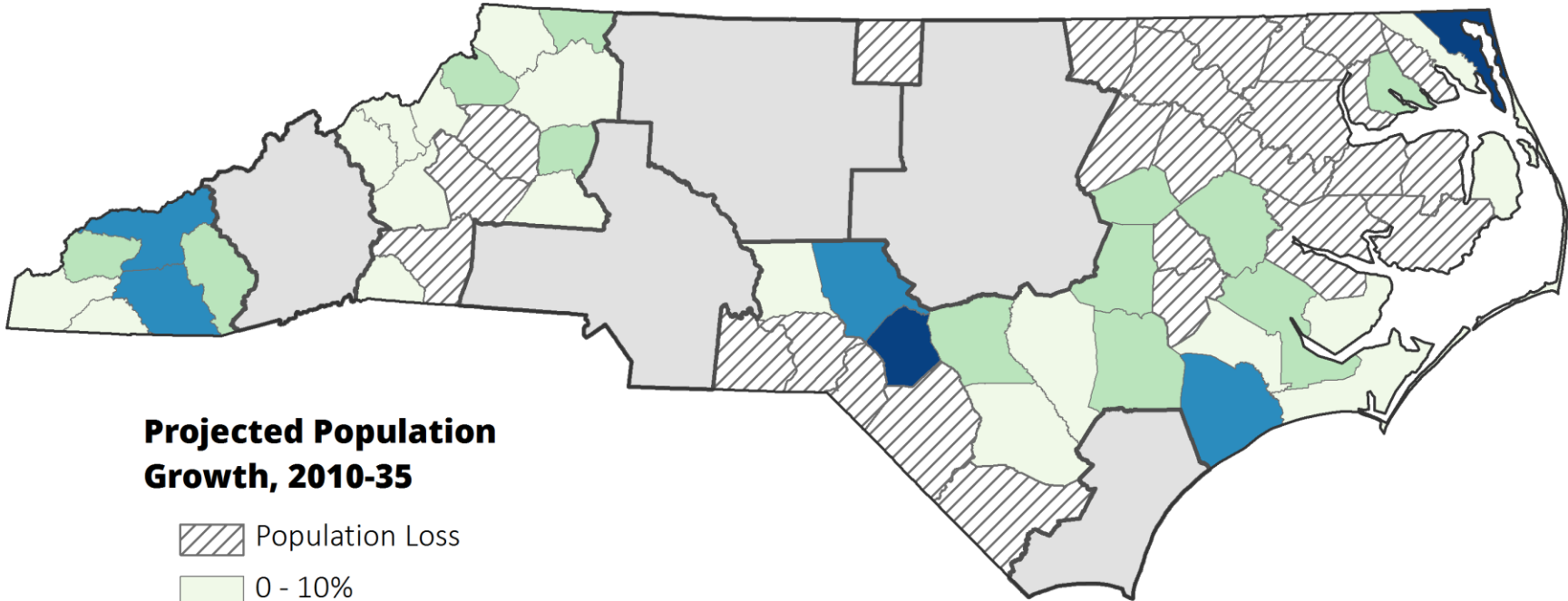
Projected population growth, 2010-2035








Data Source: NC OSBM

Many counties outside of major metros projected to lose population

Projected population growth, 2010-2035

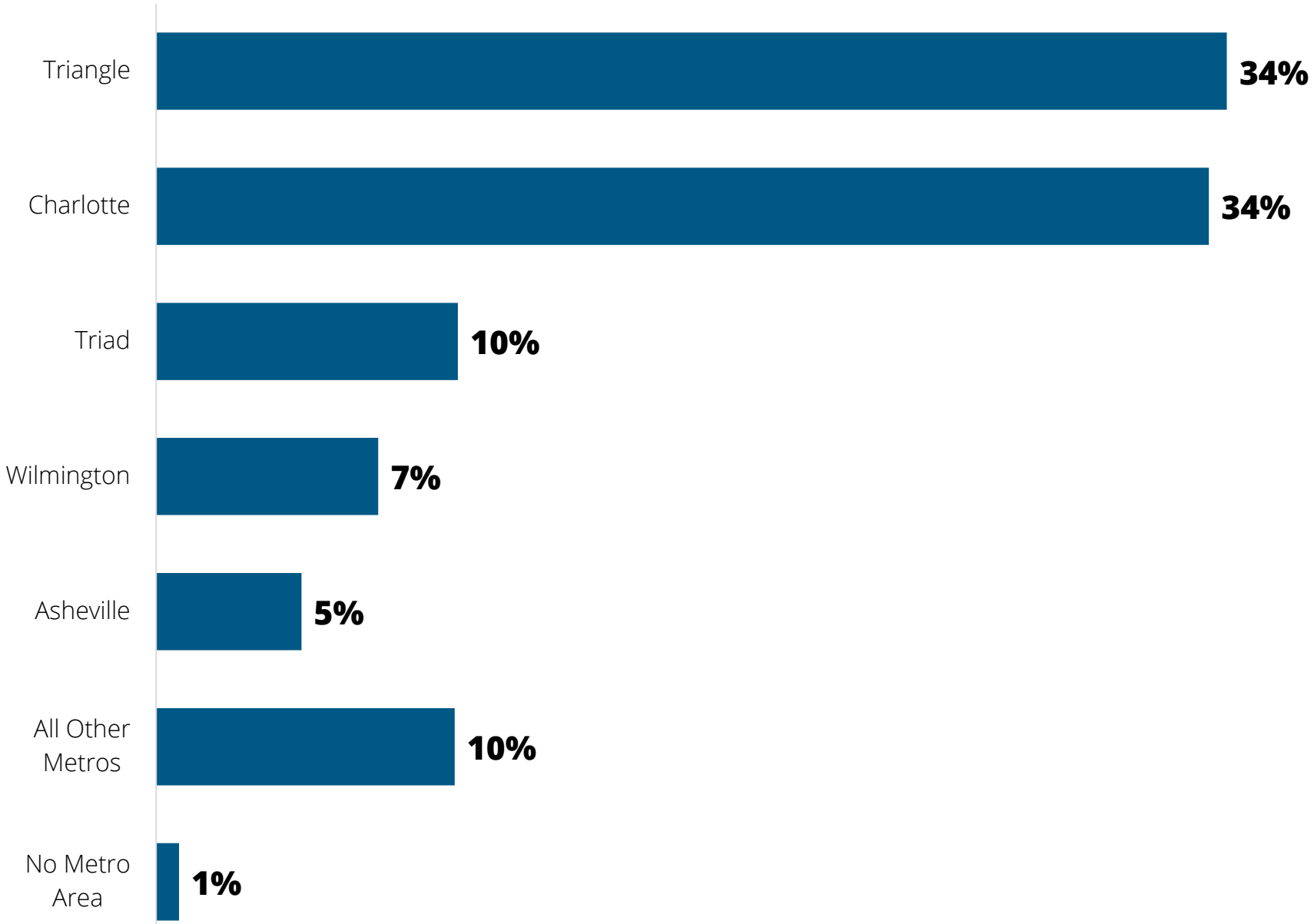


Projected Population Growth, 2010-35

-  Population Loss
-  0 - 10%
-  10 - 25%
-  25 - 50%
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Almost all future NC growth projected to occur in urban areas

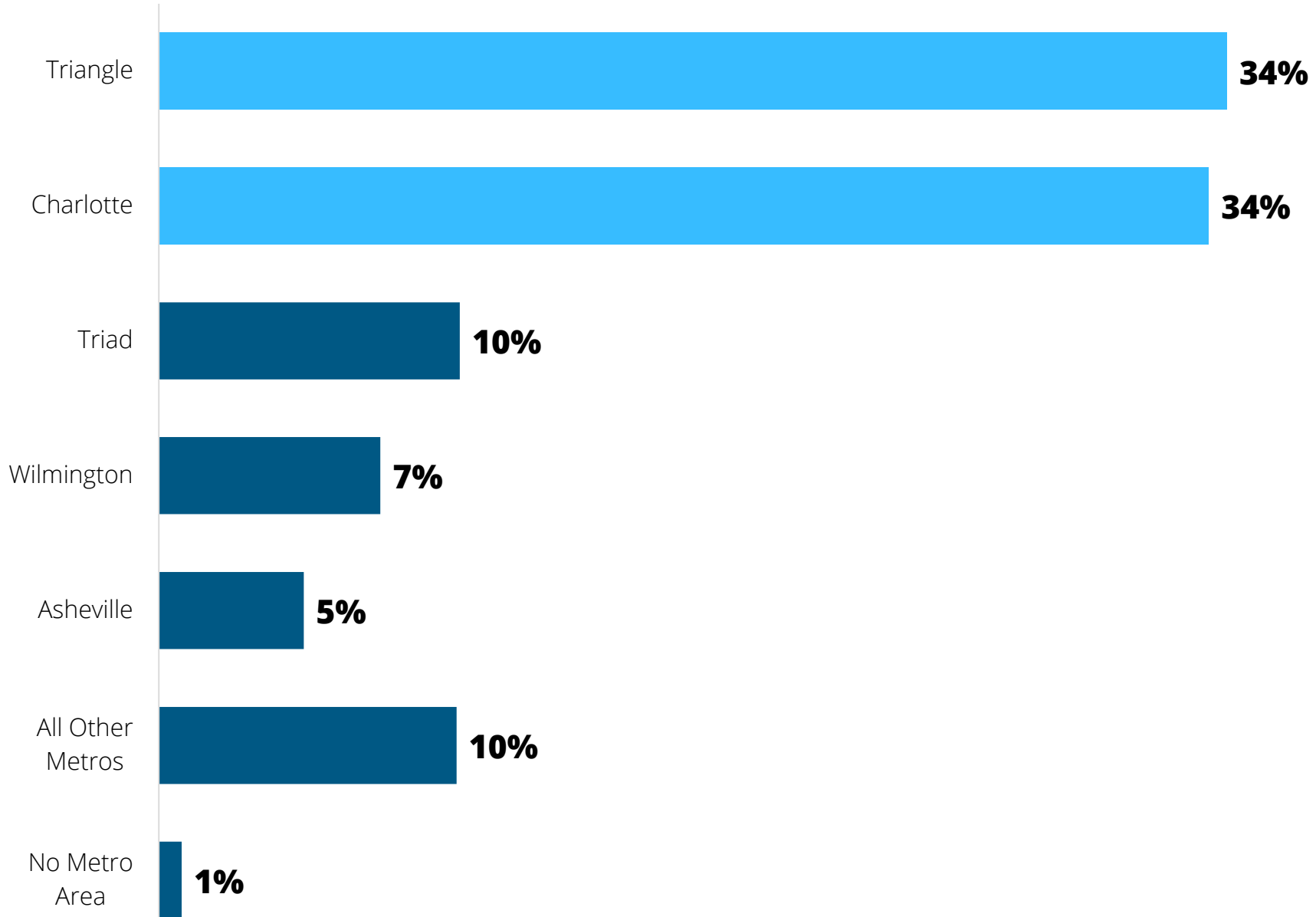
Projected share of 2010-2035 state population growth for select North Carolina metropolitan areas



Data Source: NC OSBM

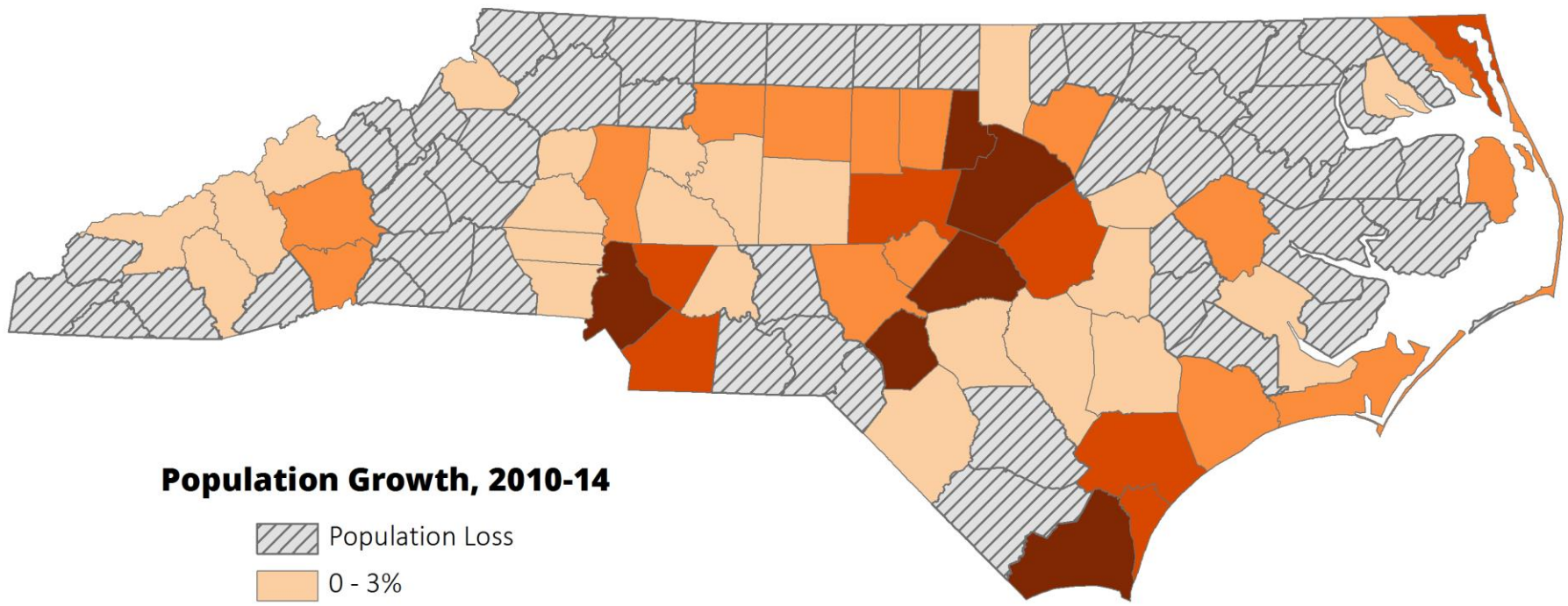
Two-thirds of NC growth projected to occur in Triangle or Charlotte

Projected share of 2010-2035 state population growth for select North Carolina metropolitan areas








Observed growth more uneven than projected

Population growth, 2010-2014

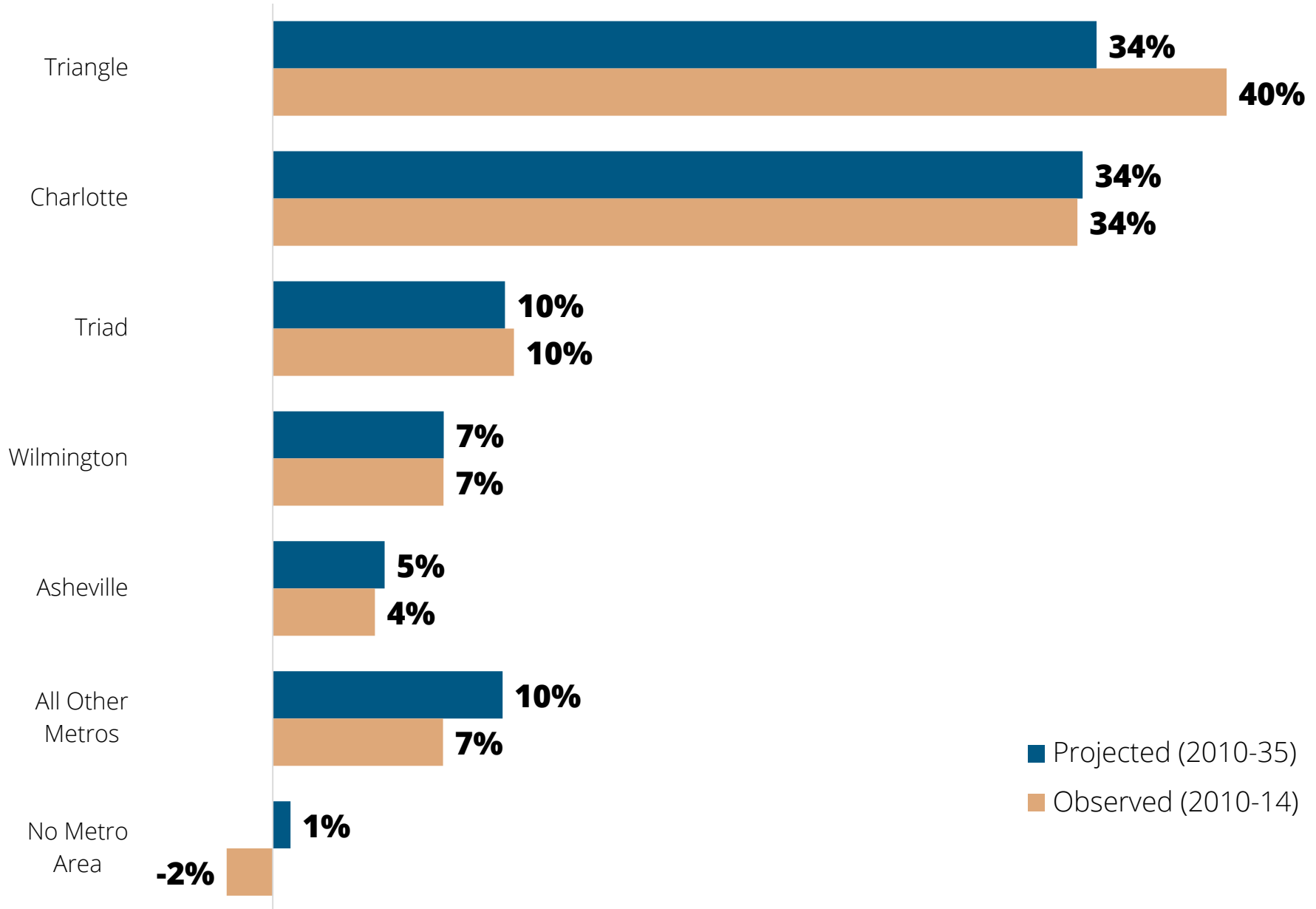


Population Growth, 2010-14

-  Population Loss
-  0 - 3%
-  3 - 6%
-  6 - 9%
-  9% or more

Observed growth suggests Triangle may outpace projections

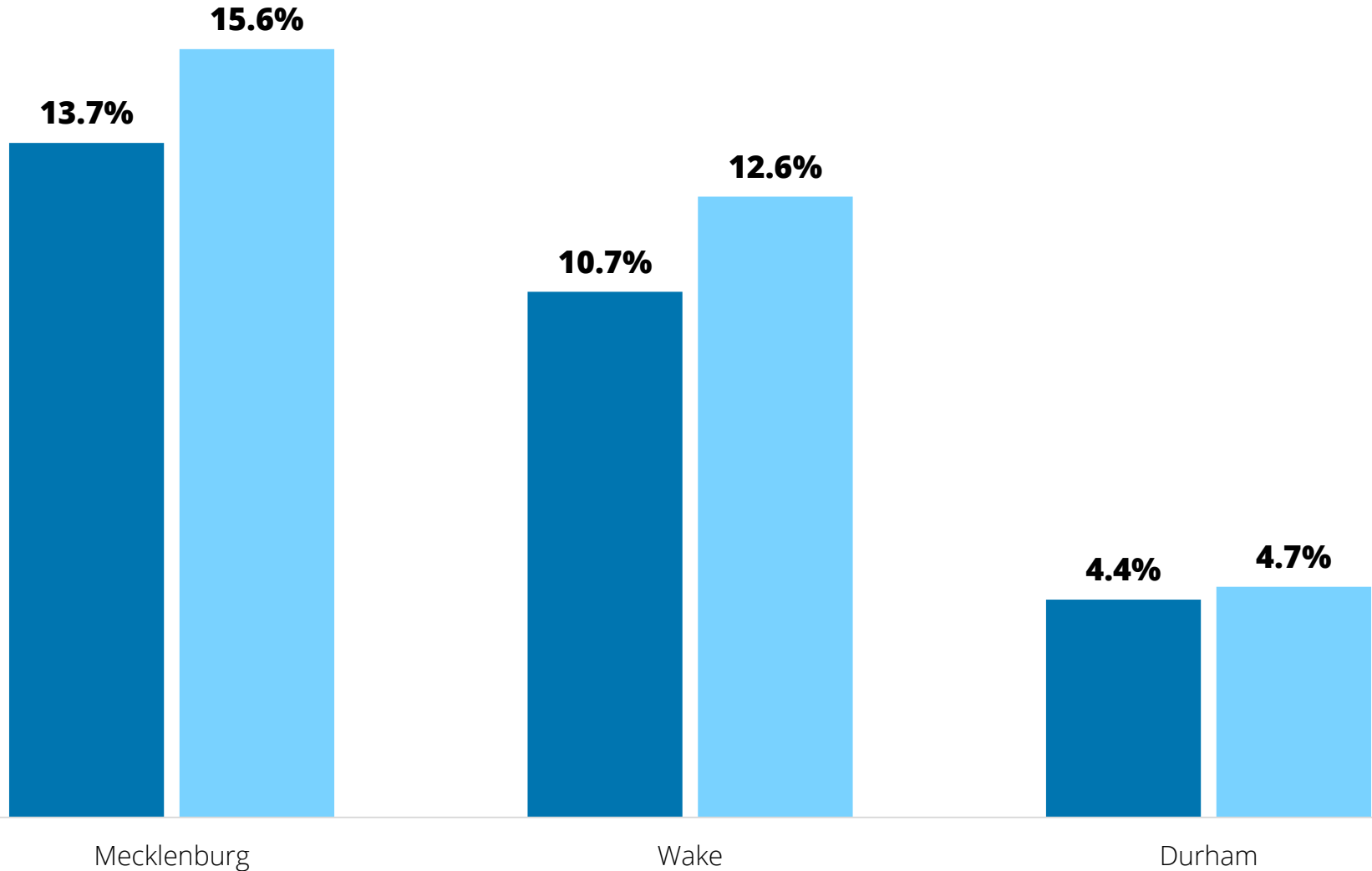
Share of state projected vs. observed growth for select North Carolina metro areas



Concentration of jobs in urban centers drives population shifts

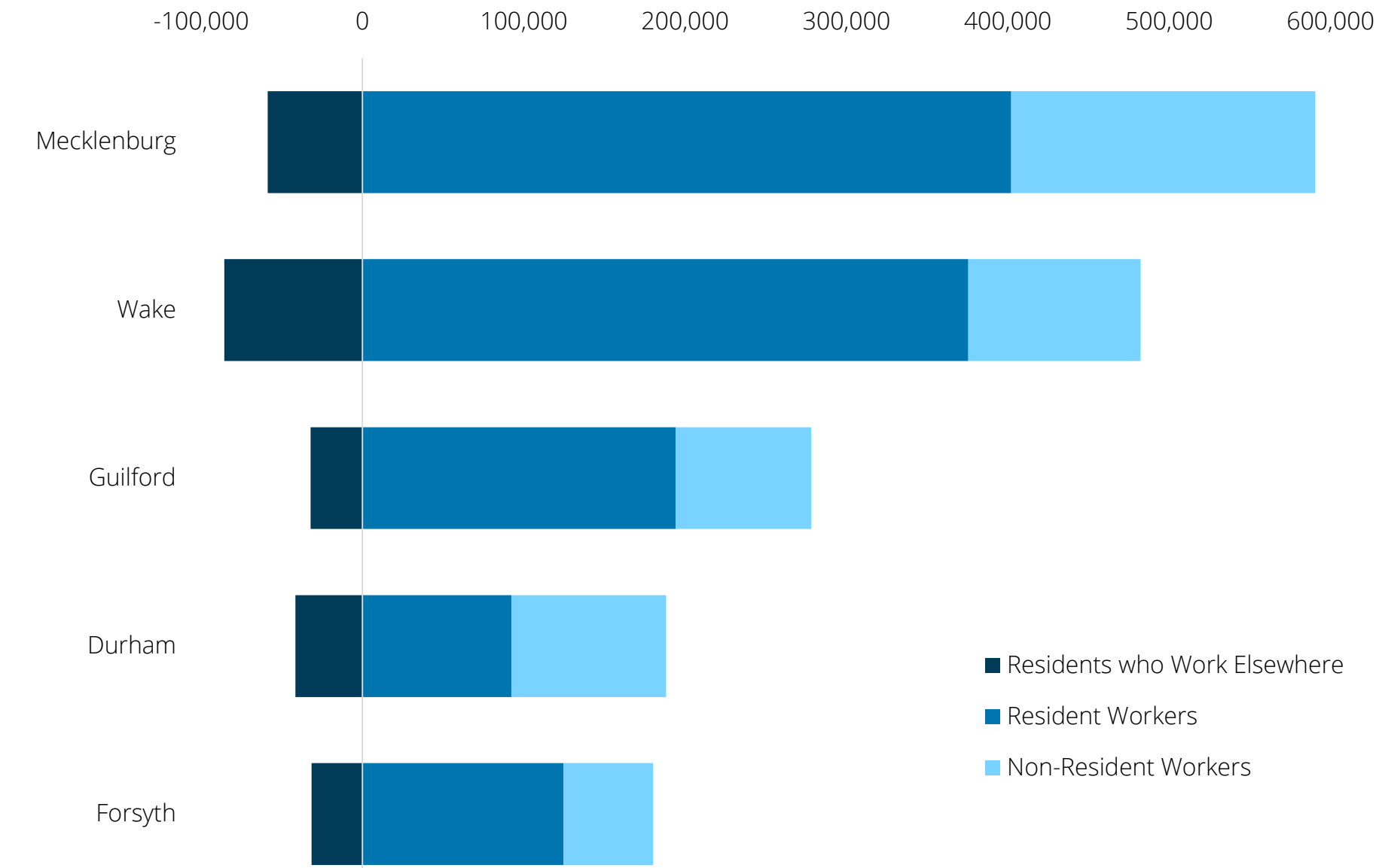
Share of state employment in Mecklenburg, Wake, and Durham, Q2 2005 vs. Q2 2015

■ 2005 (Q2) ■ 2015 (Q2)



More than 40% of NC workers work in these 5 counties

Net commuting patterns, 2009-2013



Data Source: 2009-2013 5-Year American Community Survey

Average commute to work:

24 minutes

Non-car commuting

(among 4.4 million workers)

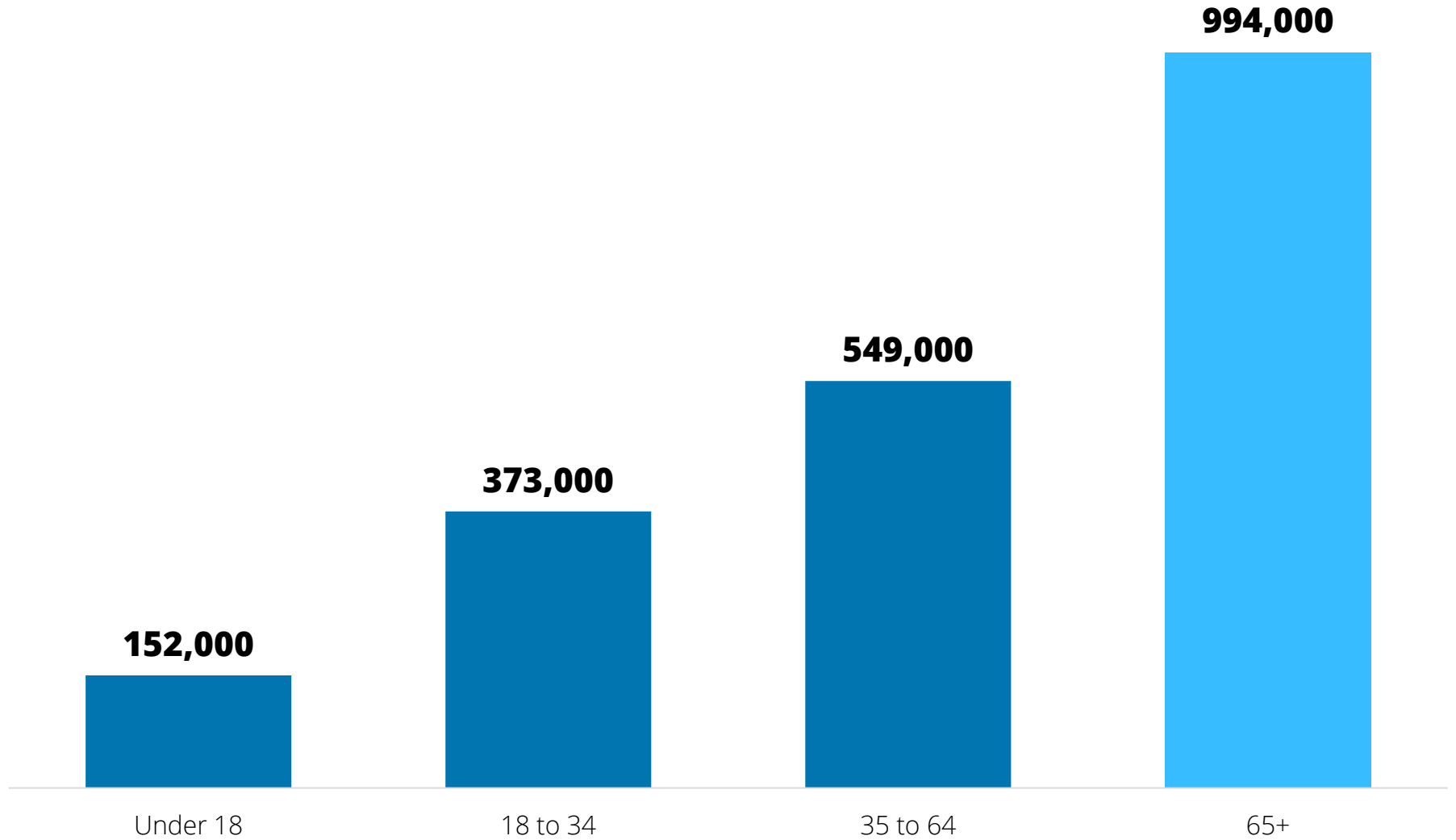
209,100 work at home

54,700 public transit

91,000 bike or walk

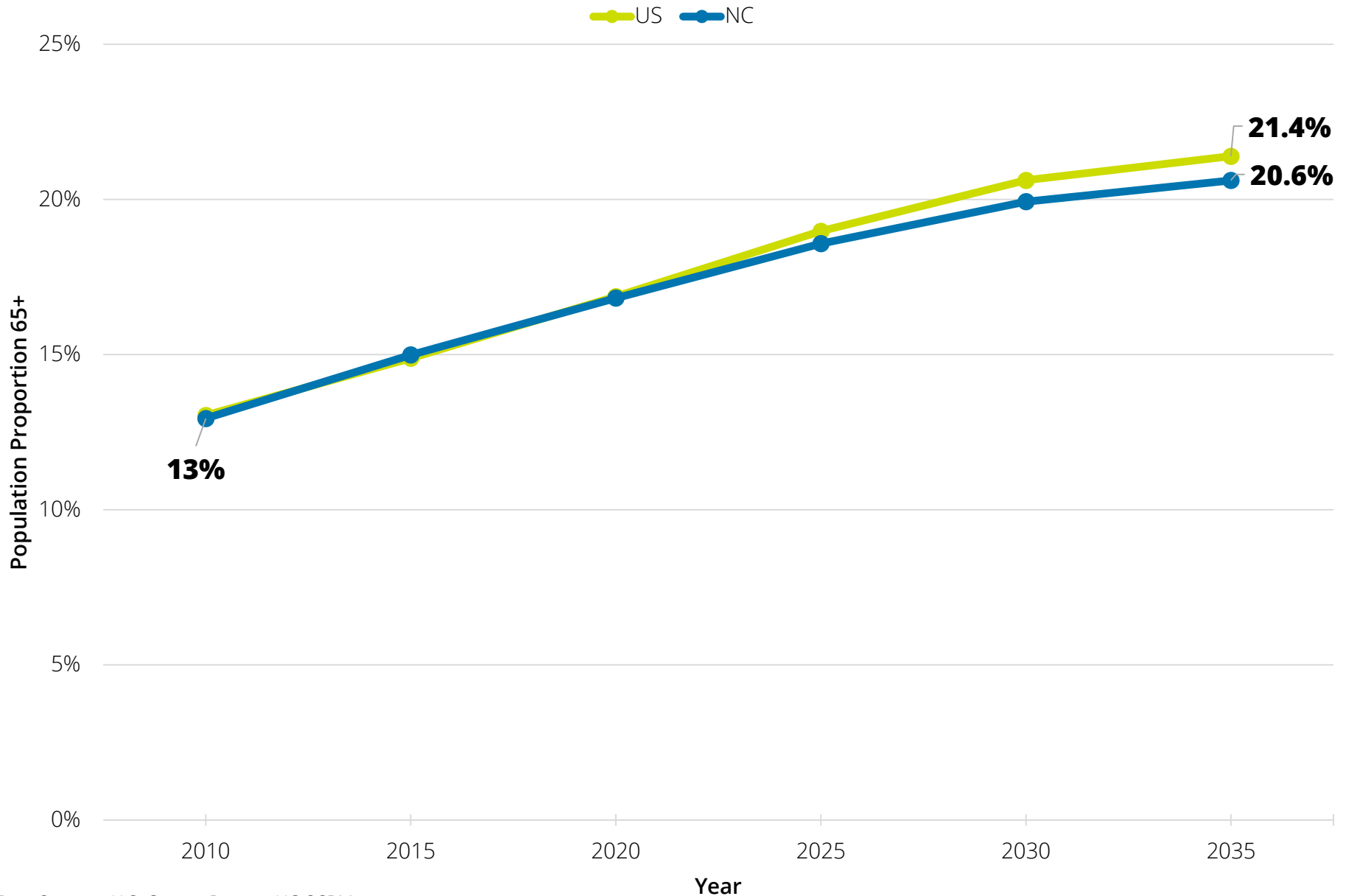
Half of state's 2 million new residents in next 20 years will be 65+

Projected NC population growth by age, 2015-2035



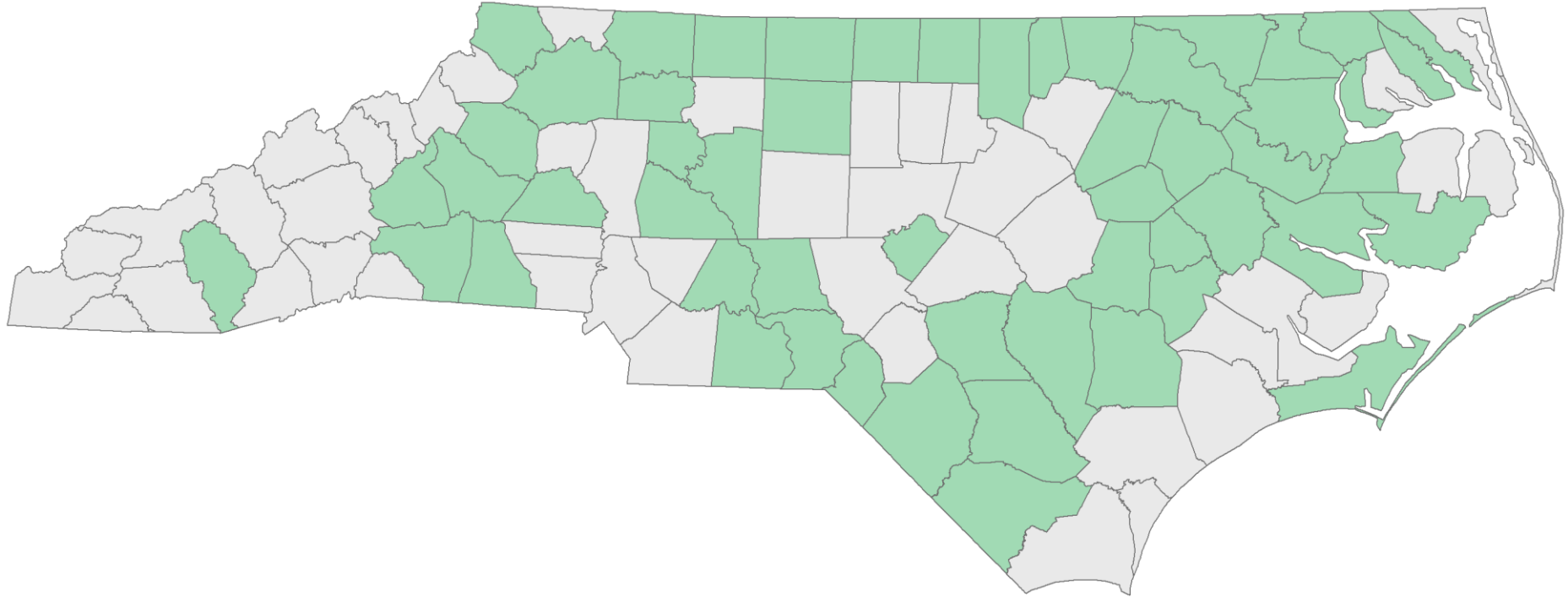
By 2035, more than 1 in 5 NC residents will be 65 or older

Projected population share 65+, NC vs. US, 2010-2035



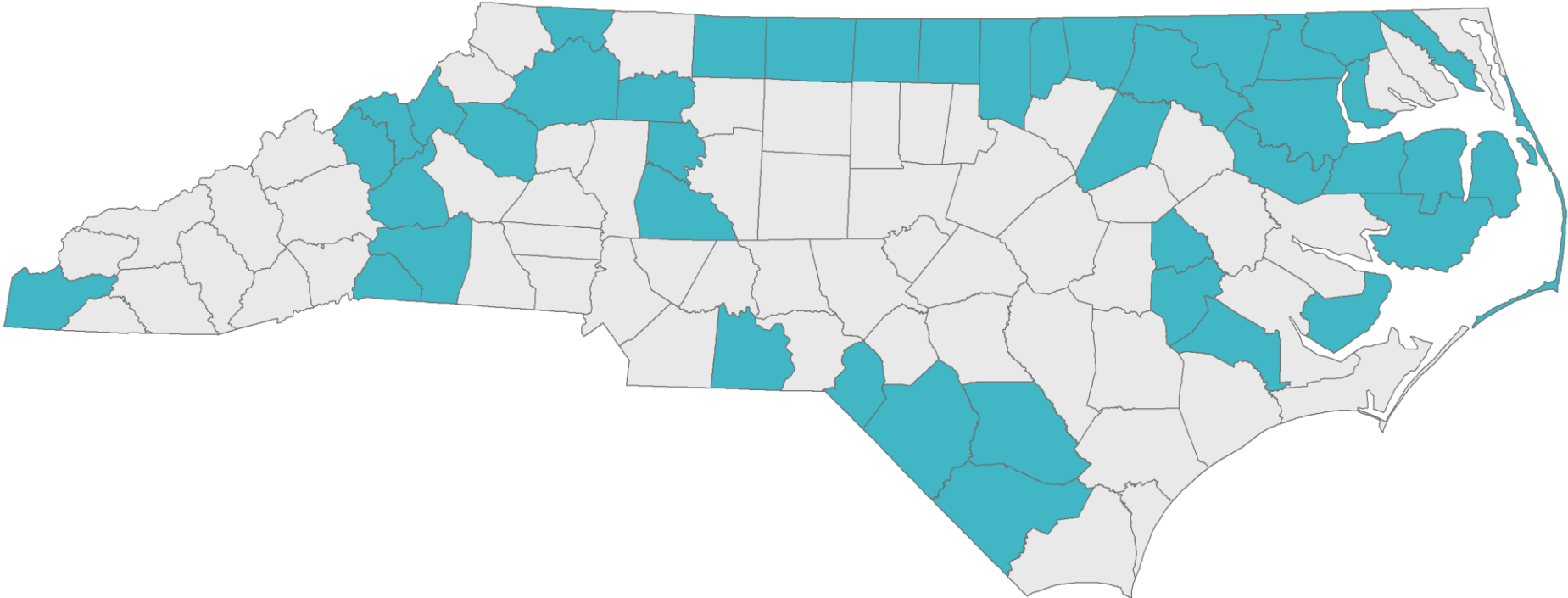
54 counties projected to have fewer children by 2035

Counties with projected declines in child population (0-17), 2015-2035



42 counties projected to have fewer young adults by 2035

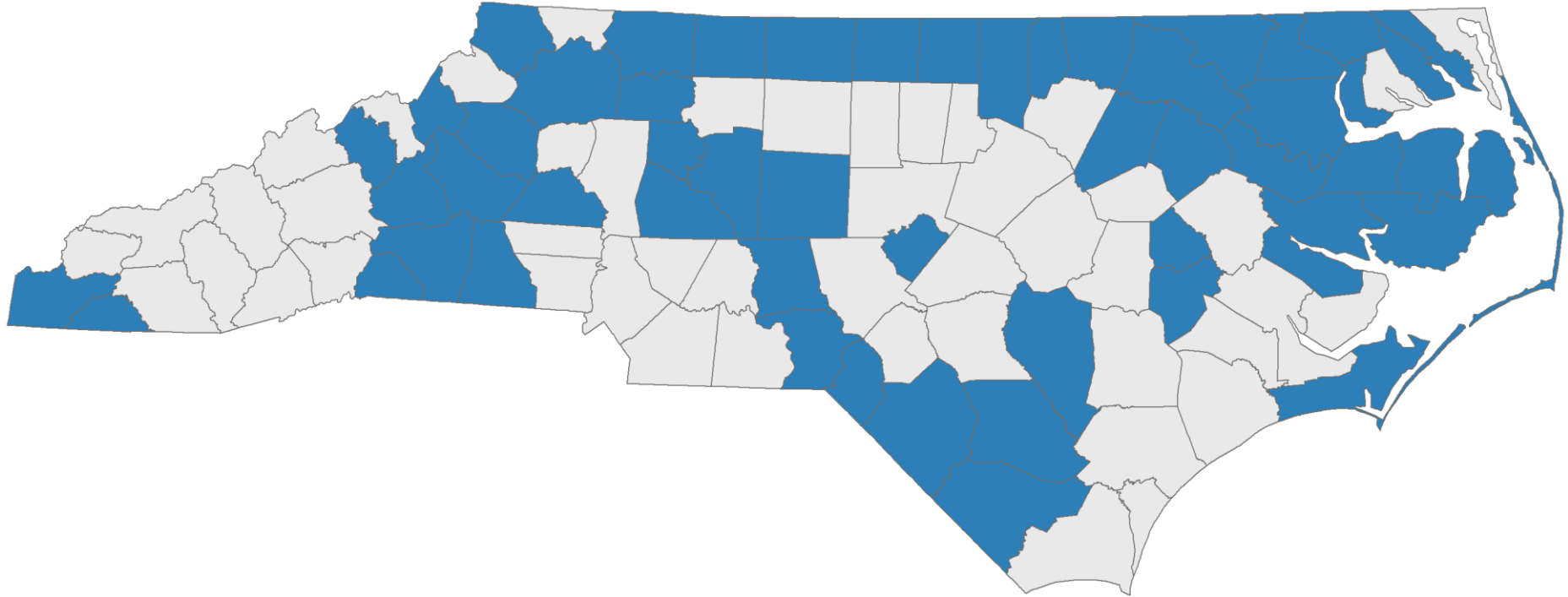
Counties with projected declines in young adult population (18-34), 2015-2035



Data Source: NC OSBM

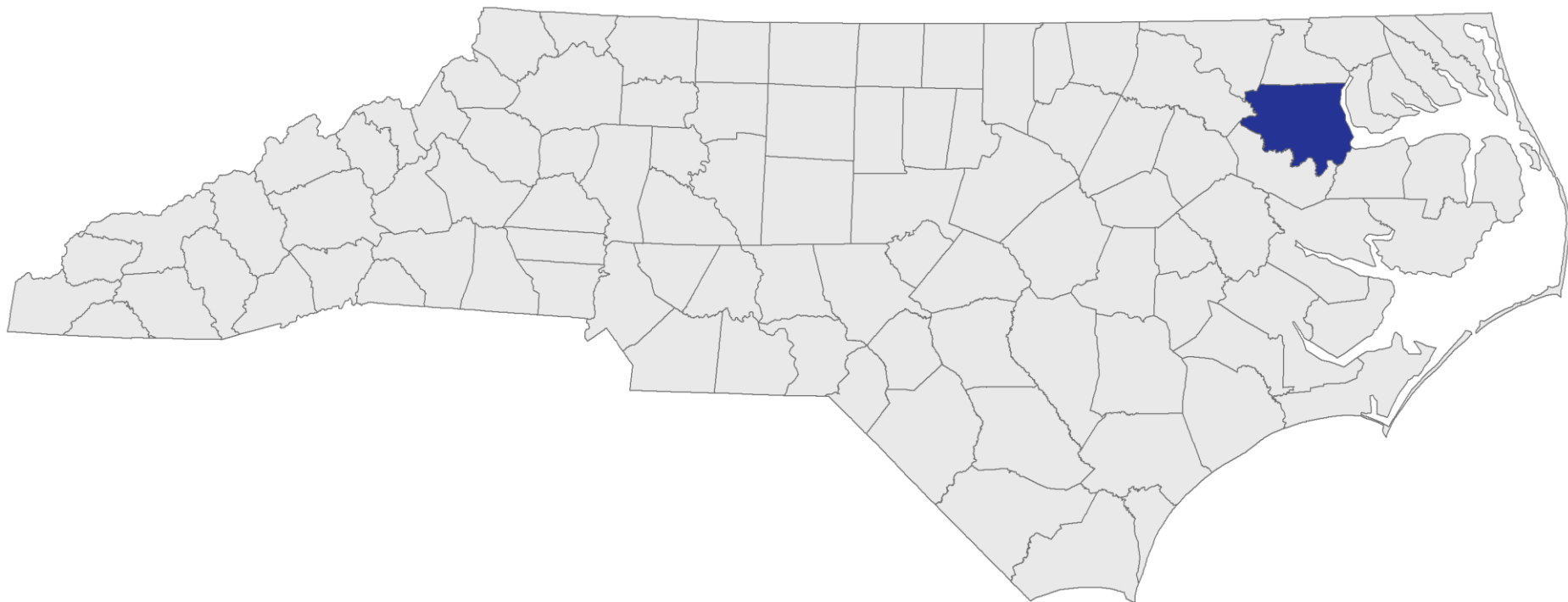
53 counties projected to have fewer working age adults by 2035

Counties with projected declines in prime working age adult population (35-64), 2015-2035



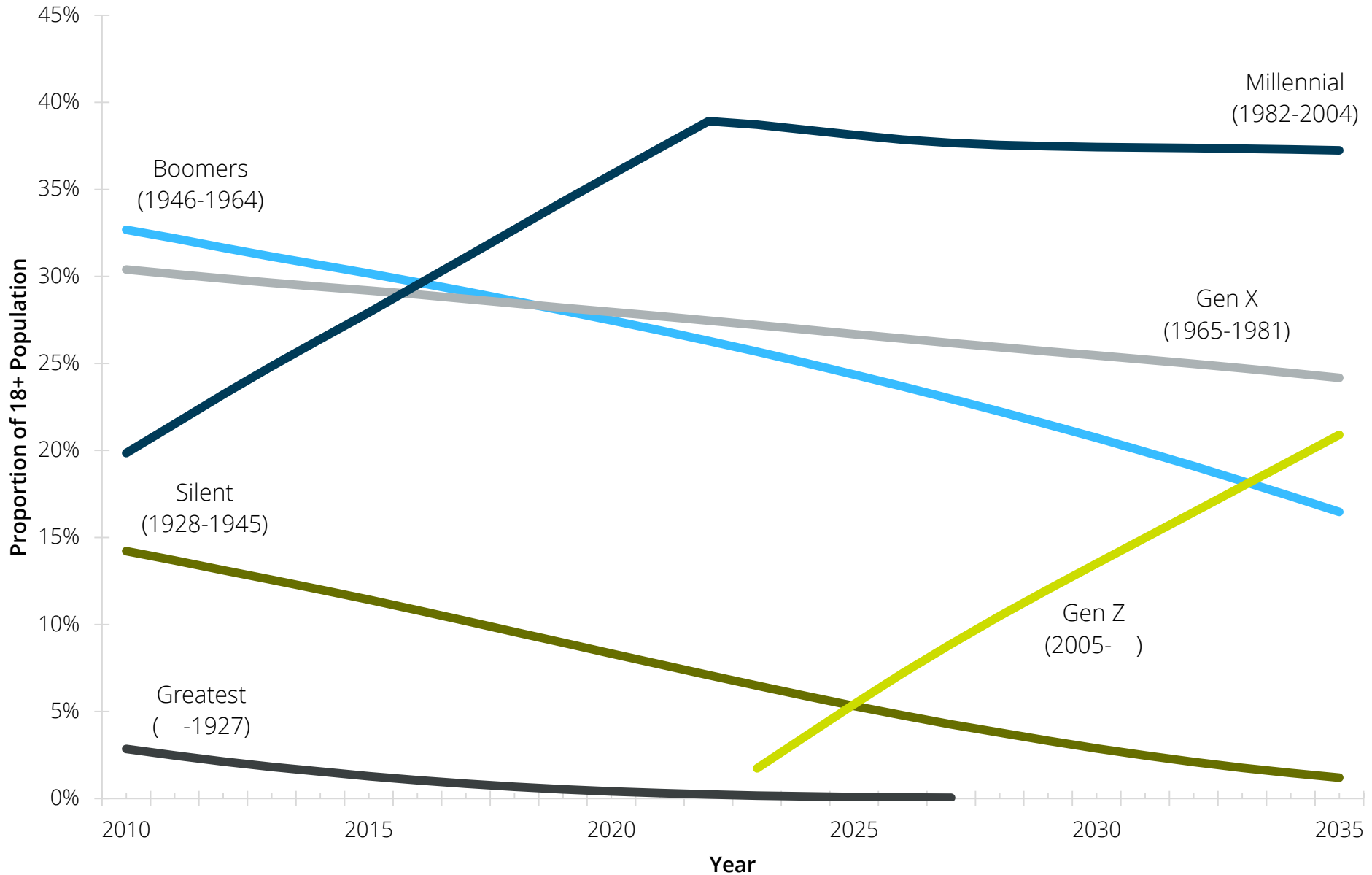
Only one county projected to have fewer older adults by 2035

Counties with projected declines in older adult population (65+), 2015-2035



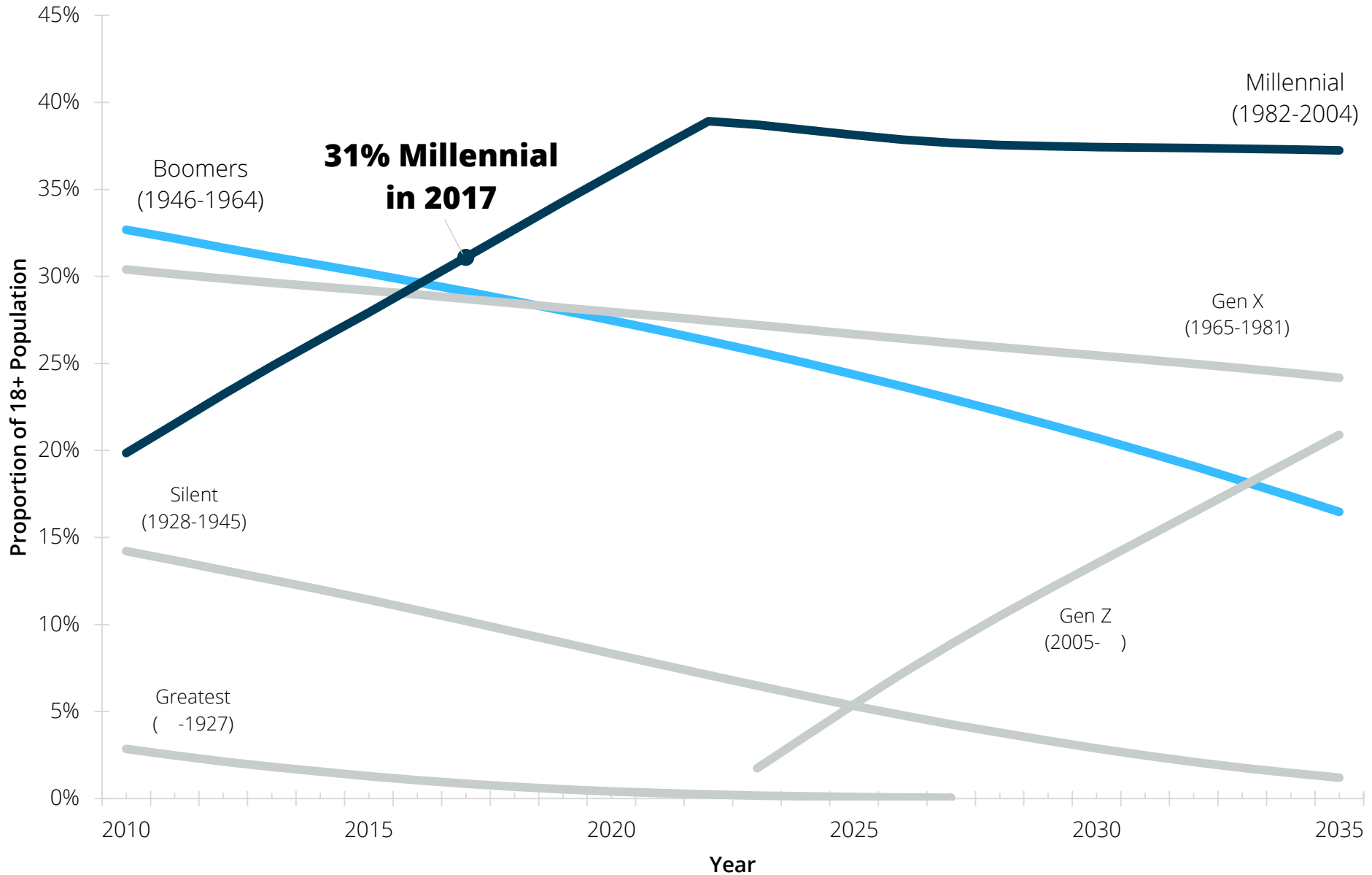
Baby Boomers are currently largest adult generation in NC

Generational composition of North Carolina's 18+ population, 2010-2035



Millennial adults will outnumber Boomers in NC by 2017

Generational composition of North Carolina's 18+ population, 2010-2035



Housing Unit Demand

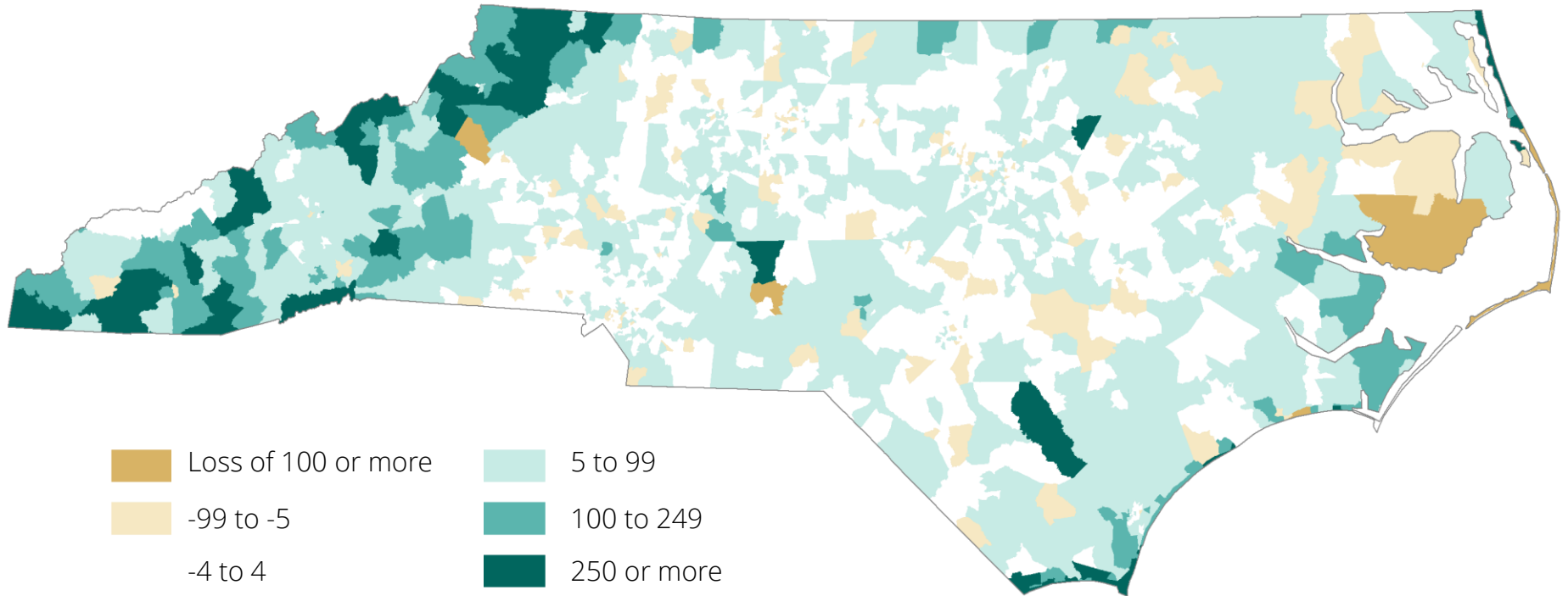
2015-2035

+1.1M households

+793K homeowners

Increases in vacation homes also impact infrastructure demands

Vacation home change by NC census tract, 2000 to 2010



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