NC Demographic Trends Through 2035

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

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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

Officially 9th most populous state as of 2014

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>10M in 2015

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Data Sources: U.S. Census Bureau, NC OSBM
North Carolina’s Total Population (July 1), 1990-2035

Officially **9th most populous state** as of 2014

**>10M** in 2015

12.1M in 2035

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

50% in 1990 vs. 66% in 2010

Data Source: U.S. Census Bureau
Population growth will be uneven across North Carolina

Projected population growth, 2010-2035

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Population growth trends across North Carolina from 2010 to 2035, with data sourced from NC OSBM. The map indicates varying levels of population growth across different counties, with some experiencing losses and others experiencing growth.

Projected Population Growth, 2010-35

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

Data Source: NC OSBM
Nearly all of the fastest growing counties are in major metro areas

Projected population growth, 2010-2035
Many counties outside of major metros projected to lose population

Projected population growth, 2010-2035

Data Source: NC OSBM
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

- Triangle: 34%
- Charlotte: 34%
- Triad: 10%
- Wilmington: 7%
- Asheville: 5%
- All Other Metros: 10%
- No Metro Area: 1%

Data Source: NC OSBM
Two-thirds of NC growth projected to occur in Triangle or Charlotte

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Data Source: NC OSBM
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

Data Source: U.S. Census Bureau
Observed growth suggests Triangle may outpace projections

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

Projecting (2010-35) vs. Observed (2010-14)

- Triangle: 40% vs. 34%
- Charlotte: 34% vs. 34%
- Triad: 10% vs. 10%
- Wilmington: 7% vs. 7%
- Asheville: 5% vs. 4%
- All Other Metros: 10% vs. 7%
- No Metro Area: -2% vs. 1%

Data Sources: NC OSBM, U.S. Census Bureau
Concentration of jobs in urban centers drives population shifts

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

Data Source: QCEW, BLS
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

Data Source: 2014 American Community Survey
Non-car commuting
(among 4.4 million workers)

209,100 work at home
54,700 public transit
91,000 bike or walk

Data Source: 2014 American Community Survey
Half of state’s 2 million new residents in next 20 years will be 65+

Projected NC population growth by age, 2015-2035

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Projected Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 18</td>
<td>152,000</td>
</tr>
<tr>
<td>18 to 34</td>
<td>373,000</td>
</tr>
<tr>
<td>35 to 64</td>
<td>549,000</td>
</tr>
<tr>
<td>65+</td>
<td>994,000</td>
</tr>
</tbody>
</table>

Data Source: NC OSBM
By 2035, more than 1 in 5 NC residents will be 65 or older

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

Data Sources: U.S. Census Bureau, NC OSBM
54 counties projected to have fewer children by 2035

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

Data Source: NC OSBM
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

Data Source: NC OSBM
Only one county projected to have fewer older adults by 2035

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

Data Source: NC OSBM
Baby Boomers are currently largest adult generation in NC
Generational composition of North Carolina's 18+ population, 2010-2035

Data Source: NC OSBM
Millennial adults will outnumber Boomers in NC by 2017

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

- Greatest (1927-1927)
- Silent (1928-1945)
- Boomers (1946-1964)
- Gen X (1965-1981)
- Gen Z (2005-

Data Source: NC OSBM
Housing Unit Demand
2015-2035

+1.1M households
+793K homeowners

Source: Carolina Demography projections using ACS, CPS, and NC OSBM data
Increases in vacation homes also impact infrastructure demands

Data Source: Carolina Demography
We help organizations make data-driven decisions.

DEMOGRAPHIC RESEARCH AND CONSULTING

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Learn more:

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