Research Triangle Equitable Growth Profile

_Strengthening the Research Triangle for Economic Success_

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PolicyLink is a research and action institute dedicated to fostering equitable communities of opportunity by lifting up what works.

The USC Program for Environmental and Regional Equity (PERE) conducts research and facilitates discussions on issues of environmental justice, regional inclusion, and social movement building.
What Equity Is?

• Full inclusion of all residents in the economic, social, and political life of the region, regardless of race, ethnicity, age, gender, neighborhood of residence, or other characteristics.

• Achieving equity requires a strong commitment to partnerships that result in real change for the better, in the lives of people.

• Equity investments are not “charity.” Equity is smart strategic investments in our most valuable capital – human beings.
Why equity is an imperative for the Triangle?

Inequality is bad for the economy

According to the IMF, lower inequality results in faster and more sustained economic growth.

- A 2011 study analyzed over 100 countries and found that every 10 percent increase in income inequality increased the length of a country’s growth cycle by 50 percent.

- A 2014 study found lower inequality is correlated with faster economic growth.

Source: Andrew Berg & Jonathan Ostry, International Monetary Fund
Why equity is an imperative for the Triangle?

The consensus is growing - inequality has a negative impact on growth.

Income inequality hurts economic growth, researchers say.

Income Inequality May Take Toll on Growth

IMF study finds inequality is damaging to economic growth

"This inequality is destabilizing and undermines the ability of the economy to grow sustainably and efficiently," she said. Income inequality, she continued, "is "anathema to the social progress that is part and parcel of such growth."

Embedding Equity in Local and Regional Strategies

Equitable Growth Profile of the Research Triangle Region

The Ghost of History

LOOK At These Homes NOW

An entire block ruined by negro invasion. Every house marked “X” now occupied by negroes. ACTUAL PHOTOGRAPH OF 4300 WEST BELLE PLACE

SAVE YOUR HOME! VOTE FOR SEGREGATION

This TRACT IS EXCLUSIVE AND RESTRICTED
Embedding Equity in Local and Regional Strategies

Equitable Growth Profile of the Research Triangle Region

The Ghost of History

**red-line** /red lin/ v: to deny loans to certain neighborhoods based on the race and/or ethnicity of its occupants. The impact of which is still evident in American cities today.

1. The Home Owners’ Loan Corporation (HOLC) was created in the wake of the Great Depression to help refinance homes at risk of foreclosure. However, the HOLC is best known for creating residential security maps, better known as “redlining maps,” to guide investment in American cities. These maps assigned grades of ‘A’ through ‘D’ to neighborhoods to indicate their desirability in terms of investment. Black and Immigrant neighborhoods were often given grades of ‘C’ or ‘D’, resulting in little or no access to mortgage insurance or credit for decades. Though the HOLC was discontinued in 1951, the impact of disinvestment as a result of redlining is still evident in many American cities today.
Not Really Ghosts - History Continues Today

Redlining & Recent Subprime Lending in Cleveland
Embedding Equity in Local and Regional Strategies

Not Really Ghosts - History Continues Today

Source: David Horsey / Los Angeles Times
Why equity is an imperative?

• The face of America is changing.

• Yet racial and income inequality is high and persistent.

• Strong communities of color are necessary for the nation’s economic growth and prosperity.

• The way forward is an equity-driven growth model.

• Metropolitan regions are where this new growth model will be created.
The Face of America is Changing
American will be Majority People-of-Color Nation by 2043

Diversity is Increasing Everywhere

Projected Population Growth from 2010 to 2040 Attributable to People of Color

Map created by PolicyLink and the Program for Environmental and Regional Equity (PERE) using data from the 2010 Decennial Census, Woods & Poole Economics projections data (adjusted using 2010 census data), Census TIGER/Line, NHGIS, and ESRI.
Diversity is Increasing Throughout the Triangle
Equitable Growth Profile of the Research Triangle Region
Defining the region

For the purposes of the equitable growth profile and data analysis, we define the Research Triangle Region as the 13-county area depicted in the map to the left. This includes the seven counties served by the Triangle J Council of Governments, the five counties served by the Kerr-Tar Council of Governments and one other county that is integrally connected to them. All data presented in the profile use this regional boundary. Minor exceptions due to lack of data availability are noted in the “Data and methods” section beginning on page 63.
What is an equitable region?

All residents:
• feel safe and possess a sense of belonging
• are fully able to participate in the economy
• contribute to the readiness for the future
• connect to assets and resources and opportunities

Strong equitable neighborhoods and regions:
• Foster economic vitality
• Are places of connection,
• Are ready for the future
Demographics

Who lives in the region and how is this changing?

The region is undergoing a major demographic shift. The region will become majority people of color around 2040, just before the nation does. Its Black, Latino, Asian, and mixed race populations will all continue to grow steadily over the next several decades.

Racial/Ethnic Composition, 1980 to 2040

Source: U.S. Census Bureau; Woods & Poole Economics, Inc.
Demographics

Who lives in the region and how is this changing?

Communities of color are spread throughout the region, but are more concentrated in the north and east. The region’s rural counties of the northeast and major cities are home to the most diverse populations.

Source: U.S. Census Bureau.
Note: Data represent a 2008 through 2012 average.
Diversity is increasing throughout the region. Between 2010 and 2040, the share of people of color is projected to rise in every county, with Lee and Wake Counties becoming majority people of color. In 2040, two-thirds of the region’s population will live in majority people-of-color counties.

Sources: U.S. Census Bureau; Woods & Poole Economics, Inc.
Demographics

Who lives in the region and how is this changing?

In the past decade, communities of color contributed the majority of population growth (56 percent). People of color contributed the majority of net growth in Harnett, Wake, Orange, Warren, Lee, and Durham counties and all of the net growth in Vance County.

Share of Population Growth Attributable to People of Color by County, 2000 to 2010

Source: U.S. Census Bureau.
Demographics
Who lives in the region and how is this changing?

The senior population is contributing to growth throughout the region. Growth in the senior population has outpaced that of the youth population in all but two counties — Orange and Chatham.

Growth Rates of the Total Population, Seniors, and Youth by County, 2000 to 2010

<table>
<thead>
<tr>
<th>Research Triangle Region</th>
<th>Total Population</th>
<th>Total Seniors</th>
<th>Total Youth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wake</td>
<td>30%</td>
<td>33%</td>
<td>40%</td>
</tr>
<tr>
<td>Durham</td>
<td>29%</td>
<td>25%</td>
<td>28%</td>
</tr>
<tr>
<td>Orange</td>
<td>25%</td>
<td>28%</td>
<td>49%</td>
</tr>
<tr>
<td>Johnston</td>
<td>24%</td>
<td>26%</td>
<td>30%</td>
</tr>
<tr>
<td>Chatham</td>
<td>22%</td>
<td>24%</td>
<td>25%</td>
</tr>
<tr>
<td>Franklin</td>
<td>21%</td>
<td>23%</td>
<td>23%</td>
</tr>
<tr>
<td>Harnett</td>
<td>20%</td>
<td>20%</td>
<td>20%</td>
</tr>
<tr>
<td>Granville</td>
<td>15%</td>
<td>15%</td>
<td>18%</td>
</tr>
<tr>
<td>Moore</td>
<td>15%</td>
<td>15%</td>
<td>18%</td>
</tr>
<tr>
<td>Lee</td>
<td>13%</td>
<td>17%</td>
<td>20%</td>
</tr>
<tr>
<td>Person</td>
<td>11%</td>
<td>11%</td>
<td>14%</td>
</tr>
<tr>
<td>Vance</td>
<td>6%</td>
<td>6%</td>
<td>9%</td>
</tr>
<tr>
<td>Warren</td>
<td>5%</td>
<td>5%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Source: U.S. Census Bureau.
Note: Youth include persons under age 18 and seniors include those age 65 or older.
Demographics

Who lives in the region and how is this changing?

The region’s fastest-growing demographic groups are comparatively young. The region’s Latino population has a median age of 25, and the Asian population has a median age of 32, whereas the White population has a median age of 39.

Median Age by Race/Ethnicity, 2012

Source: IPUMS.
Note: Data represent a 2008 through 2012 median.
Demographics

Who lives in the region and how is this changing?

There is a growing racial generation gap. Today, 48 percent of youth in the region are people of color, compared to 23 percent of seniors. This 25-percentage-point gap has more than doubled since 1980, but is similar to the national average (26 percentage points).

Percent People of Color by Age Group, 1980 to 2010

- Percent of seniors who are POC
- Percent of youth who are POC

Source: U.S. Census Bureau.
Note: Youth include persons under age 18 and seniors include those age 65 or older.
Triangle Are You Ready?
Inclusive growth
Is the region experiencing robust economic growth?

The region is recovering from the Great Recession. Pre-downturn, the region’s economy was performing stronger than average in terms of both job and GDP growth compared with the nation. It hasn’t caught up with its past growth rates. Although the region continues to have an above-average rate of job growth, GDP growth has slowed.

Annual Average Growth in Jobs and GDP, 1990 to 2007 and 2009 to 2012

Source: U.S. Bureau of Economic Analysis.
Inclusive growth
Is the region growing good jobs?

The region is growing low- and high-wage jobs faster than middle-wage jobs. Job growth was strong overall but the region saw less growth of middle-wage jobs. High-wage workers saw the greatest wage gains, followed by middle-wage workers. Low-wage workers saw the smallest wage increases.

Growth in Jobs and Earnings by Industry Wage Level, 1990 to 2012

Source: U.S. Bureau of Labor Statistics; Woods & Poole Economics, Inc. Universe includes all jobs covered by the federal Unemployment Insurance (UI) program.
Inclusive growth
Is inequality low and decreasing?

Income inequality is on the rise in the region. Inequality is slightly lower than the national average, but has steadily risen over the past three decades.

Income Inequality, 1979 to 2012

Gini coefficient measures income equality on a 0 to 1 scale.
0 (Perfectly equal) -------> 1 (Perfectly unequal)

Source: IPUMS.
Note: Data for 2012 represent a 2008 through 2012 average.
Inclusive growth
Are incomes increasing for all workers?

Wages are rising unequally. Across the board, the region’s workers are seeing above-average wage increases, but wage gains are much higher for top earners than for those in the lower half of the income spectrum. Workers at the 20th percentile and below have seen very modest gains (7 percent).

Real Earned-Income Growth for Full-Time Wage and Salary Workers, 1979 to 2012

Source: IPUMS. Universe includes civilian noninstitutional full-time wage and salary workers ages 25 through 64.
Note: Data for 2012 represent a 2008 through 2012 average.
Inclusive growth

Are incomes increasing for all workers?

There is a persistent racial gap in wages. Looking over the past decade, wages have decreased slightly for all workers (except for Asians), and there has been no improvement in the racial wage gap. People of color earn about $7 less per hour than Whites in the region.

Median Hourly Wage by Race/Ethnicity, 2000 and 2012

Source: IPUMS. Universe includes the civilian noninstitutional population ages 25 through 64.
Note: Data for 2012 represent a 2008 through 2012 average. Values are in 2010 dollars.
Inclusive growth

Is the middle class expanding?

The middle class is shrinking. Since 1979, the share of households with high incomes declined from 30 percent to 27 percent, while the middle class has declined from 40 percent to 37 percent of households. The share of lower-income households has increased from 30 percent to 36 percent.

Households by Income Level, 1979 and 2012

Source: IPUMS. Universe includes all households (no group quarters).
Note: Data for 2012 represent a 2008 through 2012 average. Dollar values are in 2010 dollars.
Inclusive growth
Is the middle class becoming more inclusive?

The loss of middle-class standing is more prominent among communities of color. The share of households of color that are middle class shrank 4 percentage points since 1979, versus 1 percentage point for White households. Latinos experienced the biggest losses in upper-income status and the largest growth in lower-income status.

Households by Income Level and Race/Ethnicity, 1979 and 2012

Source: IPUMS. Universe includes all households (no group quarters).
Note: Data for 2012 represent a 2008 through 2012 average.
Full employment
How close is the region to reaching full employment?

Several counties stand out for their high levels of unemployment. As of August 2014, the region’s unemployment rate was 4.4 percent, lower than the U.S. rate of 5.6 percent. Vance, Warren, and Lee counties had particularly high rates of unemployment (between 6.7 and 7.6 percent).

Unemployment Rate by County, December 2014

But every county has pockets of high unemployment. Outlying, rural counties have pockets of high unemployment as do the urban centers in Wake, Durham, and Orange counties. Neighborhoods with high unemployment exist in the cities of Raleigh, Durham, Garner, and Chapel Hill.

Source: U.S. Census Bureau. Universe includes the civilian noninstitutional population ages 16 and older.
Note: Data represent a 2008 through 2012 average. Areas in White are missing data.
African Americans and Latinos face comparatively higher rates of joblessness. In 2012, nearly 11 percent of Blacks and 9 percent of Latinos and Native Americans were unemployed compared to only 5.5 percent of Whites.
Full employment
How close is the region to reaching full employment?

Unemployment decreases as educational levels rise, but racial gaps remain. Blacks have the highest unemployment rates across levels of education. Less-educated Latinos do well on unemployment compared with their White counterparts at lower levels of education, but fare worse at higher levels.

Unemployment Rate by Educational Attainment and Race/Ethnicity, 2012

Source: IPUMS. Universe includes the civilian noninstitutional population ages 25 through 64.
Note: Unemployment for Asians and Others with a HS diploma or less is excluded due to small sample size. Data represent a 2008 through 2012 average.
Full employment
How close is the region to reaching full employment?

Women of color have the highest rates of unemployment at every level of education. Both White women and women of color have higher unemployment than their male counterparts. For White women, the employment gap closes completely with higher education; for women of color, it does not.

Unemployment Rate by Educational Attainment, Race/Ethnicity, and Gender, 2012

- **Less than a HSDiploma**
  - Women of color: 19%
  - Men of color: 12%
  - White women: 13%
  - White men: 11%

- **HSDiploma, no College**
  - Women of color: 19%
  - Men of color: 12%
  - White women: 13%
  - White men: 10%

- **More than HSDiploma but less than BA Degree**
  - Women of color: 11%
  - Men of color: 10%
  - White women: 11%
  - White men: 7%

- **BA Degree or higher**
  - Women of color: 5%
  - Men of color: 4%
  - White women: 6%
  - White men: 3%

Source: IPUMS. Universe includes the civilian noninstitutional population ages 25 through 64.
Note: Data represent a 2008 through 2012 average.
Access to good jobs
Can workers access high-opportunity jobs?

Access to high-opportunity jobs varies significantly by race/ethnicity throughout the region, even among workers with four-year degrees. Nearly three-quarters of college-educated Whites hold high-opportunity jobs, compared with only 46 percent of Latino immigrants and 59 percent of Blacks.

Jobs by Opportunity Level by Race/Ethnicity held by Workers with a Bachelor’s Degree or Higher, 2011

- High-opportunity
- Middle-opportunity
- Low-opportunity

Source: U.S. Bureau of Labor Statistics; IPUMS. Universe includes the employed civilian noninstitutional population ages 25 through 64.
Note: While data on workers is from the Research Triangle Region, the opportunity ranking for each worker’s occupation is based on analysis of the Raleigh-Cary and Durham Core Based Statistical Area as defined by the U.S. Office of Management and Budget. See page 77 for a description of our analysis of opportunity by occupation.
Access to good jobs
Can all workers earn a living wage?

Gaps in pay by race/ethnicity persist even as education rises. African Americans and Latinos earn lower wages than Whites at every level of education. Even among workers with a four-year college degree, Blacks and Latinos earn $7 per hour less than their White counterparts.

Median Hourly Wage by Educational Attainment and Race/Ethnicity, 2012

Source: IPUMS. Universe includes civilian noninstitutional full-time wage and salary workers ages 25 through 64.
Note: Wages for Asians and Others with a HS diploma or less are excluded due to small sample size. Data represent a 2008 through 2012 average. Dollar values are in 2010 dollars.
Access to good jobs
Can all workers earn a living wage?

Women of color have the lowest wages at every level of education. Both White women and women of color have lower wages than their male counterparts. Gaps in wages increase with education for both White women and women of color.

Median Hourly Wage by Educational Attainment, Race/Ethnicity, and Gender, 2012

- Women of color
- Men of color
- White women
- White men

Source: IPUMS. Universe includes civilian noninstitutional full-time wage and salary workers ages 25 through 64.
Note: Data represent a 2008 through 2012 average. Dollar values are in 2010 dollars.
Economic security
Is poverty low and decreasing?

Poverty is on the rise in the region, and is higher for communities of color than Whites. Nearly one out of every three Latinos and more than one out of every five African Americans and Native Americans live in poverty, compared to less than 8 percent of Whites.

Poverty Rate by Race/Ethnicity, 2000 and 2012

Source: IPUMS. Universe includes all persons not in group quarters.
Note: Data for 2012 represent a 2008 through 2012 average.
Economic security
Is poverty low and decreasing?

Rural poverty has deepened over the past decade.
High-poverty neighborhoods have emerged in Person, Vance, Moore, Johnston, and Lee counties, while other counties have seen more gradual increases.

Source: U.S. Census Bureau. Universe includes all persons not in group quarters.
Note: Data for 2012 represent a 2008 through 2012 average. Areas in White are missing data.
Neighborhood poverty has also deepened in urban counties over the past decade. High poverty-neighborhoods have emerged in north Durham and the eastern portion of Raleigh, as well as to the northeast of Raleigh.

Poverty Rate by Census Tract, 2000 and 2012 (Zoom-In)

Source: U.S. Census Bureau. Universe includes all persons not in group quarters.
Note: Data for 2012 represent a 2008 through 2012 average. Areas in White are missing data.
Economic security
Is poverty low and decreasing?

Poverty is highest in the region’s rural counties. At 28 percent, Vance County’s poverty rate is double the regional average, and Warren is close behind with a rate of 24 percent. While Wake County has one of the lowest poverty rates (11 percent), it has the largest number of people in poverty.

### Poverty Rate by County, 2012

<table>
<thead>
<tr>
<th>County</th>
<th>Poverty Rate</th>
<th>Number in Poverty</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research Triangle Region</td>
<td>14%</td>
<td>280,209</td>
</tr>
<tr>
<td>Urban</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wake</td>
<td>11%</td>
<td>96,703</td>
</tr>
<tr>
<td>Orange</td>
<td>17%</td>
<td>21,591</td>
</tr>
<tr>
<td>Durham</td>
<td>18%</td>
<td>46,112</td>
</tr>
<tr>
<td>Rural</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chatham</td>
<td>11%</td>
<td>7,006</td>
</tr>
<tr>
<td>Granville</td>
<td>14%</td>
<td>7,996</td>
</tr>
<tr>
<td>Moore</td>
<td>14%</td>
<td>12,675</td>
</tr>
<tr>
<td>Franklin</td>
<td>15%</td>
<td>9,047</td>
</tr>
<tr>
<td>Johnston</td>
<td>16%</td>
<td>26,988</td>
</tr>
<tr>
<td>Harnett</td>
<td>16%</td>
<td>18,318</td>
</tr>
<tr>
<td>Person</td>
<td>16%</td>
<td>6,380</td>
</tr>
<tr>
<td>Lee</td>
<td>17%</td>
<td>9,908</td>
</tr>
<tr>
<td>Warren</td>
<td>24%</td>
<td>280,209</td>
</tr>
<tr>
<td>Vance</td>
<td>28%</td>
<td>12,555</td>
</tr>
</tbody>
</table>

Source: U.S. Census Bureau. Universe includes all persons not in group quarters.
Note: Data represent a 2008 through 2012 average.
Economic security
Is poverty low and decreasing?

Poverty is increasing throughout the region. The number of people in poverty in Wake County more than doubled between 2000 and 2012. Growth in poverty outpaced the regional rate in rural Johnston County as well.

Growth in Population Below the Poverty Level by County, 2000 to 2012

<table>
<thead>
<tr>
<th>Research Triangle Region</th>
<th>68%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orange</td>
<td>41%</td>
</tr>
<tr>
<td>Durham</td>
<td>61%</td>
</tr>
<tr>
<td>Wake</td>
<td>103%</td>
</tr>
<tr>
<td>Warren</td>
<td>32%</td>
</tr>
<tr>
<td>Harnett</td>
<td>40%</td>
</tr>
<tr>
<td>Vance</td>
<td>45%</td>
</tr>
<tr>
<td>Chatham</td>
<td>48%</td>
</tr>
<tr>
<td>Person</td>
<td>51%</td>
</tr>
<tr>
<td>Moore</td>
<td>51%</td>
</tr>
<tr>
<td>Franklin</td>
<td>56%</td>
</tr>
<tr>
<td>Granville</td>
<td>60%</td>
</tr>
<tr>
<td>Lee</td>
<td>60%</td>
</tr>
<tr>
<td>Johnston</td>
<td>75%</td>
</tr>
</tbody>
</table>

Source: U.S. Census Bureau. Universe includes all persons not in group quarters.
Note: Data for 2012 represent a 2008 through 2012 average.
Economic security
Is working poverty low and decreasing?

The working poor population is on the rise. The region’s Latinos have a very high rate of working poor, defined as working full time with incomes at or below 200 percent of poverty. All communities of color experience higher rates of being working poor than Whites.

Source: IPUMS. Universe includes the civilian noninstitutional population ages 25 through 64 not in group quarters.
Note: Data for 2012 represent a 2008 through 2012 average.
Economic Security
Is poverty low for vulnerable populations?

Latino and African American children have the highest poverty rates. In 2012, nearly two out of every five Latino children and about three out of every 10 Black children lived in poverty, rates exceeding the average (about one in five). Whites and Asians have the lowest child poverty rates (8 percent and 7 percent).

Child Poverty Rate by Race/Ethnicity, 2012

- All: 19%
- Latino: 39%
- Black: 31%
- Other: 18%
- White: 8%
- Asian/Pacific Islander: 7%

Source: IPUMS. Universe includes the civilian non-institutional population under age 18.
Note: Data represent a 2008 through 2012 average.
Economic security
Is the tax structure equitable?

State and local taxes in North Carolina pose greater burdens on low- and middle-income families. Low-income families in North Carolina spend a greater share of their household income on state and local taxes than high-income families.

State and Local Taxes as a Share of Family Income, 2015

Source: Institute on Taxation & Economic Policy. Universe includes singles and couples, with and without children, under the age of 65.
Note: Figures show permanent law in North Carolina enacted through January 2, 2015 at 2012 income levels. Top figure represents total state and local taxes as a share of income, post-federal offset.
Economic security
Can residents build wealth?

Asset poverty is highest in rural counties but widespread across the region. Statewide, people of color are more likely to be asset poor. Asset poverty is defined as the percentage of households without sufficient net worth to subsist at the poverty level for three months in the absence of income.

Asset Poverty by County, 2012

<table>
<thead>
<tr>
<th>County</th>
<th>Asset Poverty</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research Triangle Region</td>
<td>23.7%</td>
</tr>
<tr>
<td>Urban</td>
<td></td>
</tr>
<tr>
<td>Orange</td>
<td>20.8%</td>
</tr>
<tr>
<td>Wake</td>
<td>21.4%</td>
</tr>
<tr>
<td>Durham</td>
<td>29.9%</td>
</tr>
<tr>
<td>Rural</td>
<td></td>
</tr>
<tr>
<td>Chatham</td>
<td>14.0%</td>
</tr>
<tr>
<td>Moore</td>
<td>20.7%</td>
</tr>
<tr>
<td>Johnston</td>
<td>21.9%</td>
</tr>
<tr>
<td>Granville</td>
<td>23.1%</td>
</tr>
<tr>
<td>Franklin</td>
<td>26.4%</td>
</tr>
<tr>
<td>Person</td>
<td>27.3%</td>
</tr>
<tr>
<td>Harnett</td>
<td>29.0%</td>
</tr>
<tr>
<td>Lee</td>
<td>29.3%</td>
</tr>
<tr>
<td>Warren</td>
<td>30.2%</td>
</tr>
<tr>
<td>Vance</td>
<td>38.7%</td>
</tr>
</tbody>
</table>

Source: Corporation for Enterprise Development.

Economic security
Can residents build wealth?

The region’s rural counties have some of the largest shares of unbanked households. Unbanked households are those with neither a checking nor a savings account. About one in six households in Vance and Warren Counties are unbanked.

Share of Unbanked Households by County, 2012

[Bar chart showing share of unbanked households by county]

Source: Corporation for Enterprise Development.
Strong industries and occupations

Health care, professional services, and wholesale trade are strong sectors experiencing growth in jobs and wages. The region’s sizable manufacturing sector continues to experience significant job losses, and wage decline is a major challenge within the region’s growing retail and food services sectors.

<table>
<thead>
<tr>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Health Care and Social Assistance</td>
<td>109,965</td>
<td>1.0</td>
<td>$44,303</td>
<td>38,003</td>
<td>53%</td>
<td>10%</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>92,453</td>
<td>0.9</td>
<td>$25,394</td>
<td>1,061</td>
<td>1%</td>
<td>-8%</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>80,491</td>
<td>1.0</td>
<td>$76,275</td>
<td>-41,403</td>
<td>-34%</td>
<td>11%</td>
</tr>
<tr>
<td>Accommodation and Food Services</td>
<td>71,018</td>
<td>0.9</td>
<td>$15,378</td>
<td>14,602</td>
<td>26%</td>
<td>-6%</td>
</tr>
<tr>
<td>Professional, Scientific, and Technical Services</td>
<td>63,714</td>
<td>1.3</td>
<td>$74,872</td>
<td>13,231</td>
<td>26%</td>
<td>12%</td>
</tr>
<tr>
<td>Administrative and Support and Waste Management and Remediation Services</td>
<td>52,428</td>
<td>1.1</td>
<td>$32,705</td>
<td>-796</td>
<td>-1%</td>
<td>13%</td>
</tr>
<tr>
<td>Construction</td>
<td>39,747</td>
<td>1.1</td>
<td>$41,934</td>
<td>-7,625</td>
<td>-16%</td>
<td>4%</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>31,748</td>
<td>0.9</td>
<td>$72,498</td>
<td>3,732</td>
<td>13%</td>
<td>20%</td>
</tr>
<tr>
<td>Finance and Insurance</td>
<td>29,073</td>
<td>0.8</td>
<td>$70,066</td>
<td>5,828</td>
<td>25%</td>
<td>21%</td>
</tr>
<tr>
<td>Other Services (except Public Administration)</td>
<td>22,787</td>
<td>0.8</td>
<td>$32,230</td>
<td>999</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>Information</td>
<td>21,404</td>
<td>1.2</td>
<td>$72,495</td>
<td>-3,610</td>
<td>-14%</td>
<td>10%</td>
</tr>
<tr>
<td>Education Services</td>
<td>20,263</td>
<td>1.2</td>
<td>$45,082</td>
<td>7,025</td>
<td>53%</td>
<td>6%</td>
</tr>
<tr>
<td>Transportation and Warehousing</td>
<td>13,828</td>
<td>0.5</td>
<td>$37,975</td>
<td>-2,302</td>
<td>-14%</td>
<td>1%</td>
</tr>
<tr>
<td>Arts, Entertainment, and Recreation</td>
<td>12,988</td>
<td>1.0</td>
<td>$20,019</td>
<td>3,441</td>
<td>36%</td>
<td>-12%</td>
</tr>
<tr>
<td>Management of Companies and Enterprises</td>
<td>12,632</td>
<td>1.0</td>
<td>$87,935</td>
<td>3,554</td>
<td>39%</td>
<td>33%</td>
</tr>
<tr>
<td>Real Estate and Rental and Leasing</td>
<td>11,684</td>
<td>0.9</td>
<td>$39,845</td>
<td>526</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>Agriculture, Forestry, Fishing and Hunting</td>
<td>3,828</td>
<td>0.5</td>
<td>$33,909</td>
<td>-923</td>
<td>-19%</td>
<td>-7%</td>
</tr>
<tr>
<td>Utilities</td>
<td>2,835</td>
<td>0.8</td>
<td>$83,001</td>
<td>-1,421</td>
<td>-33%</td>
<td>5%</td>
</tr>
<tr>
<td>Mining</td>
<td>629</td>
<td>0.1</td>
<td>$44,817</td>
<td>-748</td>
<td>-54%</td>
<td>-33%</td>
</tr>
</tbody>
</table>

Source: U.S. Bureau of Labor Statistics; Woods & Poole Economics., Inc. Universe includes all jobs covered by the federal Unemployment Insurance (UI) program.
Strong industries and occupations

What are the region’s strongest occupations?

Management occupations, computer operations, and teaching are strong and growing occupations in the region. These job categories all pay good wages, employ many people, and have exhibited gains in recent years.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Computer Occupations</td>
<td>35,740</td>
<td>$76,221</td>
<td>2%</td>
<td>8,890</td>
<td>33%</td>
<td>39</td>
</tr>
<tr>
<td>Health Diagnosing and Treating Practitioners</td>
<td>31,940</td>
<td>$72,950</td>
<td>6%</td>
<td>9,610</td>
<td>43%</td>
<td>42</td>
</tr>
<tr>
<td>Business Operations Specialists</td>
<td>27,290</td>
<td>$62,905</td>
<td>5%</td>
<td>8,360</td>
<td>44%</td>
<td>42</td>
</tr>
<tr>
<td>Preschool, Primary, Secondary, and Special Education School Teachers</td>
<td>23,500</td>
<td>$41,848</td>
<td>9%</td>
<td>8,690</td>
<td>59%</td>
<td>39</td>
</tr>
<tr>
<td>Financial Specialists</td>
<td>15,570</td>
<td>$62,029</td>
<td>4%</td>
<td>3,890</td>
<td>33%</td>
<td>42</td>
</tr>
<tr>
<td>Other Management Occupations</td>
<td>15,150</td>
<td>$83,345</td>
<td>13%</td>
<td>1,150</td>
<td>8%</td>
<td>44</td>
</tr>
<tr>
<td>Sales Representatives, Wholesale and Manufacturing</td>
<td>12,570</td>
<td>$57,548</td>
<td>-3%</td>
<td>1,270</td>
<td>11%</td>
<td>42</td>
</tr>
<tr>
<td>Top Executives</td>
<td>12,240</td>
<td>$117,129</td>
<td>9%</td>
<td>-90</td>
<td>-1%</td>
<td>46</td>
</tr>
<tr>
<td>Postsecondary Teachers</td>
<td>11,000</td>
<td>$89,799</td>
<td>1%</td>
<td>1,120</td>
<td>11%</td>
<td>36</td>
</tr>
<tr>
<td>Operations Specialties Managers</td>
<td>10,600</td>
<td>$111,884</td>
<td>14%</td>
<td>1,340</td>
<td>14%</td>
<td>42</td>
</tr>
<tr>
<td>Engineers</td>
<td>8,780</td>
<td>$79,766</td>
<td>1%</td>
<td>740</td>
<td>9%</td>
<td>42</td>
</tr>
<tr>
<td>Sales Representatives, Services</td>
<td>7,480</td>
<td>$58,965</td>
<td>14%</td>
<td>2,350</td>
<td>46%</td>
<td>40</td>
</tr>
<tr>
<td>Life Scientists</td>
<td>6,250</td>
<td>$75,895</td>
<td>9%</td>
<td>4,230</td>
<td>209%</td>
<td>39</td>
</tr>
<tr>
<td>Physical Scientists</td>
<td>4,140</td>
<td>$69,550</td>
<td>6%</td>
<td>420</td>
<td>11%</td>
<td>39</td>
</tr>
<tr>
<td>Advertising, Marketing, Promotions, Public Relations, and Sales Managers</td>
<td>3,990</td>
<td>$112,666</td>
<td>20%</td>
<td>-550</td>
<td>-12%</td>
<td>41</td>
</tr>
<tr>
<td>Supervisors of Construction and Extraction Workers</td>
<td>3,620</td>
<td>$52,563</td>
<td>2%</td>
<td>-1,120</td>
<td>-24%</td>
<td>43</td>
</tr>
<tr>
<td>Lawyers, Judges, and Related Workers</td>
<td>3,330</td>
<td>$96,245</td>
<td>18%</td>
<td>450</td>
<td>16%</td>
<td>45</td>
</tr>
<tr>
<td>Supervisors of Installation, Maintenance, and Repair Workers</td>
<td>2,870</td>
<td>$54,614</td>
<td>-3%</td>
<td>-70</td>
<td>-2%</td>
<td>43</td>
</tr>
<tr>
<td>Supervisors of Production Workers</td>
<td>2,420</td>
<td>$54,835</td>
<td>2%</td>
<td>-1,160</td>
<td>-32%</td>
<td>44</td>
</tr>
<tr>
<td>Supervisors of Protective Service Workers</td>
<td>1,680</td>
<td>$60,176</td>
<td>5%</td>
<td>1,000</td>
<td>147%</td>
<td>44</td>
</tr>
</tbody>
</table>

Source: U.S. Bureau of Labor Statistics; IPUMS. Universe includes all nonfarm wage and salary jobs. Analysis reflects the Raleigh-Cary and Durham Core Based Statistical Areas as defined by the U.S. Office of Management and Budget.

Note: See page 77 for a description of our analysis of opportunity by occupation.
Skilled workforce
Do workers have the education and skills needed for the jobs of the future?

The education levels of the region’s African American and Latinos (especially immigrants) aren’t keeping up with employers’ educational demands. By 2020, 42 percent of jobs in North Carolina will require at least an associate’s degree, yet most workers of color do not have that level of education.

Share of Working-Age Population with an Associate’s Degree or Higher by Race/Ethnicity, 2012, and Projected Share of Jobs that Require an Associate’s Degree or Higher, 2020

Source: Georgetown Center for Education and the Workforce; IPUMS. Universe for education levels of workers includes all persons ages 25 through 64.
Note: Data for 2012 by race/ethnicity/nativity represent a 2008 through 2012 average and is at the regional level; data on jobs in 2020 represent state-level projection for North Carolina.
Prepared youth
Are youth ready to enter the workforce?

More of the region’s youth are getting high school degrees today than in the past, but racial gaps remain. Although dropout and non-enrollment rates have decreased for Latinos, 45 percent of Latino immigrants and 13 percent of U.S.-born Latinos lack a high school education.


Source: IPUMS.
Note: Data for Others and US-born and immigrant Latinos in 1990 is excluded due to small sample size. Data for 2012 represent a 2008 through 2012 average.
A growing number of the region’s youth are disconnected from work and school. More than 30,000 youth are disconnected today, up from 25,000 in 2000. Youth of color are disproportionately disconnected (65 percent of the disconnected and only 46 percent of all 16-to-24-year-olds) but this is a growing challenge for youth of all races/ethnicities.
Equitable Growth Profile of the Research Triangle Region

Connectedness
Can all residents access affordable housing?

High rent burden is evident in the urban core and outer suburbs. While urban Wake County has a below-average renter burden (47 percent), rents are much higher in some of its urban core and suburban neighborhoods.

Source: U.S. Census Bureau. Universe includes all renter-occupied households with cash rent.
Note: Data represent a 2008 through 2012 average. Areas in White are missing data.
Equitable Growth Profile of the Research Triangle Region

Connectedness
Can all residents access affordable housing?

The region’s renter housing burden rates vary across race and ethnicity. More than half of Black and Latino renter households are housing burdened (paying more than 30 percent of income on rent). Asian renter households have rates of housing burden lower than Whites.

Percent Rent-Burdened Households by Race/Ethnicity, 2012

Source: IPUMS. Universe includes all renter-occupied households with cash rent.
Note: Data represent a 2008 through 2012 average.
Connectedness
Can all residents access transportation?

Car access varies by neighborhood in some counties. The vast majority of households in the region have access to at least one vehicle, but rates of carlessness are high in rural areas at the outer edges of the region, as well as in some urban centers in Wake County.

Percent Households without a Vehicle by Census Tract, 2012

Source: U.S. Census Bureau. Universe includes all households (excludes group quarters).
Note: Data represent a 2008 through 2012 average. Areas in White are missing data.
### Connectedness

**Can all residents access transportation?**

**Blacks have the least access to cars in the region.**
Black and Native American communities have the highest rates of carlessness (13 percent and 10 percent). Whites are the less likely than all communities of color to be carless (3 percent).

<table>
<thead>
<tr>
<th>Percent Households without a Vehicle by Race/Ethnicity, 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
</tr>
<tr>
<td>Black</td>
</tr>
<tr>
<td>Native American</td>
</tr>
<tr>
<td>Latino</td>
</tr>
<tr>
<td>Other</td>
</tr>
<tr>
<td>Asian/Pacific Islander</td>
</tr>
<tr>
<td>White</td>
</tr>
</tbody>
</table>

Source: IPUMS. Universe includes all households (excludes group quarters).
Note: Data represent a 2008 through 2012 average.
Connectedness
Do residents have reasonable travel times to work?

Rural residents face longer commutes on average.
Commute times in the region are lowest in urban counties: in Durham County the average travel time to work is 21 minutes, while in rural Person County it is 31 minutes.

<table>
<thead>
<tr>
<th>Research Triangle Region</th>
<th>Average Travel Time to Work in Minutes (2012)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Urban</td>
<td></td>
</tr>
<tr>
<td>Durham</td>
<td>21.4</td>
</tr>
<tr>
<td>Orange</td>
<td>22.1</td>
</tr>
<tr>
<td>Wake</td>
<td>23.5</td>
</tr>
<tr>
<td>Lee</td>
<td>22.4</td>
</tr>
<tr>
<td>Vance</td>
<td>23.7</td>
</tr>
<tr>
<td>Moore</td>
<td>24.0</td>
</tr>
<tr>
<td>Chatham</td>
<td>26.8</td>
</tr>
<tr>
<td>Granville</td>
<td>27.7</td>
</tr>
<tr>
<td>Warren</td>
<td>27.8</td>
</tr>
<tr>
<td>Johnston</td>
<td>28.3</td>
</tr>
<tr>
<td>Harnett</td>
<td>28.3</td>
</tr>
<tr>
<td>Franklin</td>
<td>29.9</td>
</tr>
<tr>
<td>Person</td>
<td>31.0</td>
</tr>
</tbody>
</table>

Source: U.S. Census Bureau. Universe includes all persons ages 16 or older who work outside of home. Note: Data represent a 2008 through 2012 average.
Connectedness
Do residents have reasonable travel times to work?

Native Americans face the longest commutes on average. Average commute times for Native Americans and Latinos exceed the average (28 and 26 minutes). On the other hand, Asians have the shortest average commute time at just under 22 minutes.

Average Travel Time to Work in Minutes by Race/Ethnicity, 2012

<table>
<thead>
<tr>
<th>Race/Ethnicity</th>
<th>Average Commute Time (minutes)</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>24.2</td>
</tr>
<tr>
<td>Native American</td>
<td>28.2</td>
</tr>
<tr>
<td>Latino</td>
<td>25.9</td>
</tr>
<tr>
<td>Other</td>
<td>24.4</td>
</tr>
<tr>
<td>Black</td>
<td>24.2</td>
</tr>
<tr>
<td>White</td>
<td>24.1</td>
</tr>
<tr>
<td>Asian/Pacific Islander</td>
<td>21.9</td>
</tr>
</tbody>
</table>

Source: IPUMS. Universe includes all persons ages 16 or older who work outside of home. Note: Data represent a 2008 through 2012 average.
Equity Will Make Our Economy and Democracy Stronger

The path to an economically strong, resilient region
Economic benefits of equity

How much higher would GDP be without racial economic inequities?

The Research Triangle Region’s GDP would have been $21.8 billion higher in 2012 if there were no racial disparities in income. If each racial/ethnic group had the same average income and work hours as Whites, the region’s GDP would increase by 19 percent.

Actual GDP and Estimated GDP without Racial Gaps in Income (Billions), 2012

Source: Bureau of Economic Analysis; IPUMS.
Note: Data for 2012 represent a 2008 through 2012 average.
The path to an economically strong, resilient region

The Path to Forward
Training! Good jobs! Training! Good jobs!

Create pathways to good jobs for workers facing barriers to employment

**Barriers:**
- Low educational attainment
- Criminal history
- Child care needs
- No or sporadic work history
- Skills gap

**Opportunities:**
- HS and post HS apprenticeship programs
- Business retention incentives
- Workforce development: lumber, manufacturing, wine, health
- Life and soft skills training
Build the foundation for the future

*Build cradle-to-career pipelines for all youth*

[promiseneighborhoodsinstitute.org](http://promiseneighborhoodsinstitute.org)

U.S. GDP would be two to four percent higher if we had closed the achievement gap between black and Latino students and white students during the 1980s and 1990s

(2009 McKinsey paper)
The path to an economically strong, resilient region

Build the foundation for the future
More than education and jobs....
Equitable Development Toolkit

Land Use and Environment
- Community Mapping
- Inclusionary Zoning
- Infill Incentives
- Brownfields
- Commercial Stabilization
- Commercial Linkage Strategies

Health and Place
- Healthy Food Retailing
- Asthma and the Environment
- Code Enforcement

Affordable Housing
- Just Cause Eviction Controls
- Rent Controls
- Expiring Use: Retention of Subsidized Housing
- Employer-Assisted Housing
- Housing Trust Funds

Economic Opportunity
- Minority Contracting
- Local Hiring Strategies
- Living Wage Provisions
- CDC's with Resident Shareholders
- Cooperative Ownership Models
- Community Development Financial Institutions

Coming Soon:
- Urban Parks and Greening
- Climate Change Advocacy
- Foreclosed Properties
Data in Action: Data Drives Economic Opportunity in New Orleans >
Data revealing 52 percent of black men in New Orleans are jobless led Mayor Landrieu to launch an ambitious new jobs plan.

Equity Profile: Houston Region
Houston’s economy is strong overall, but racial inequities in education, income, health, and opportunity—along with stagnant wages and rising inequality—place its future prosperity at risk.

• nationalequityatlas.com
• **Save the date!**
• **Equity 2015: The National Summit**
• **October 27-29, 2015**
• **Los Angeles, California**
PolicyLink is a national research and action institute advancing economic and social equity by Lifting Up What Works®.

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The USC Program for Environmental and Regional Equity (PERE) conducts research and facilitates discussions on issues of environmental justice, regional inclusion, and social movement building.

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Equitable Growth Profiles are products of a partnership between PolicyLink and PERE, the Program for Environmental and Regional Equity at the University of Southern California.

The views expressed in this document are those of PolicyLink and PERE, and do not necessarily represent those of Triangle J Council of Governments and Kerr Tar Regional Council of Governments.

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