

Warning: Gale Force Demographic Wind Gusts Ahead!



James H. Johnson, Jr., Ph.D.
Frank Hawkins Kenan Institute of Private Enterprise
Kenan-Flagler Business School
University of North Carolina at Chapel Hill

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Overview

North Carolina's Population Boom

Demographic Winners & Losers

Seven Gale Force Wind Gusts

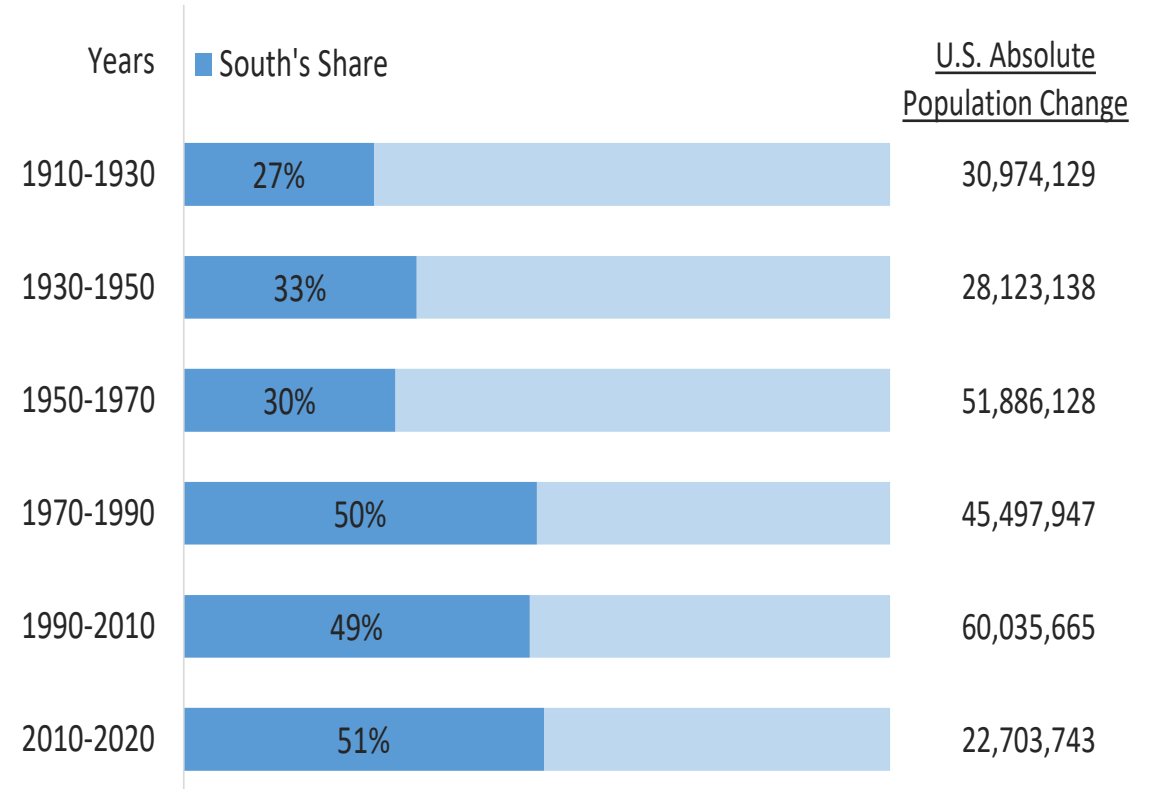
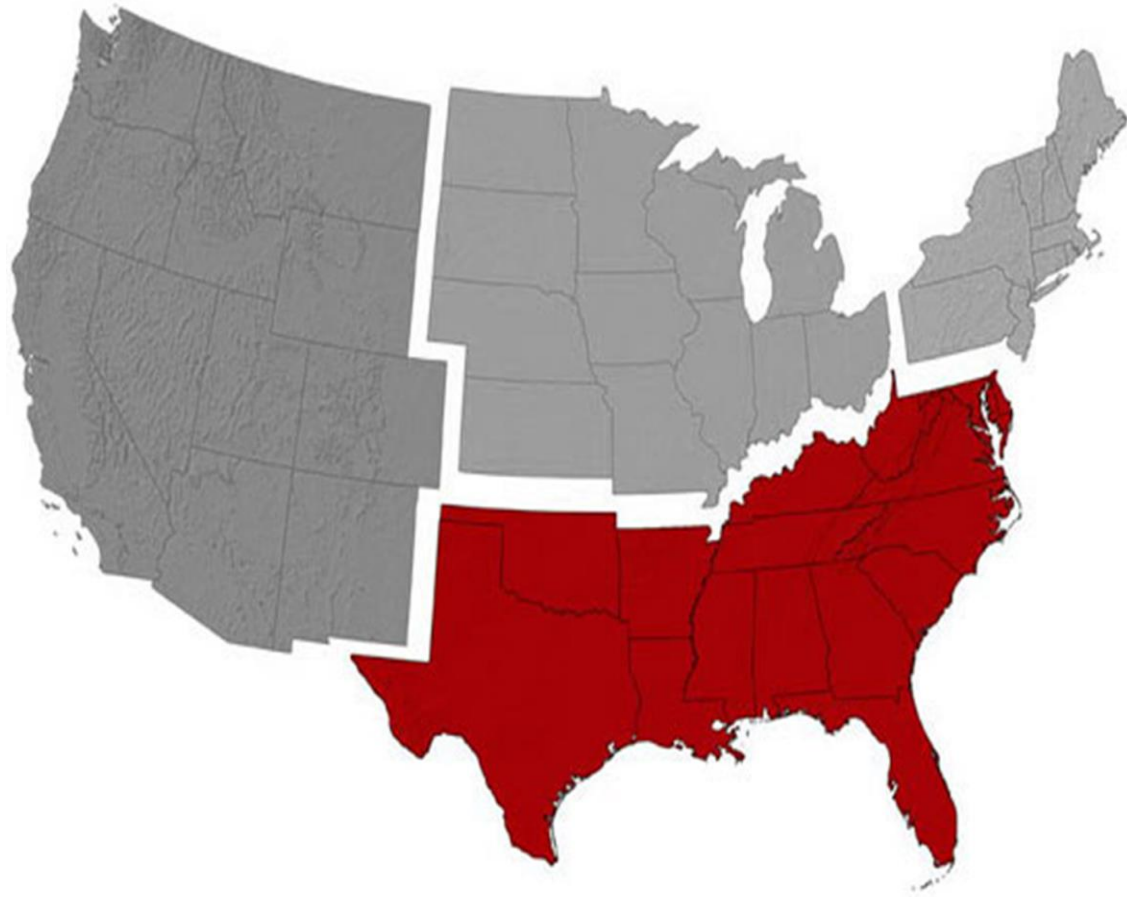
Key Takeaways

Discussion

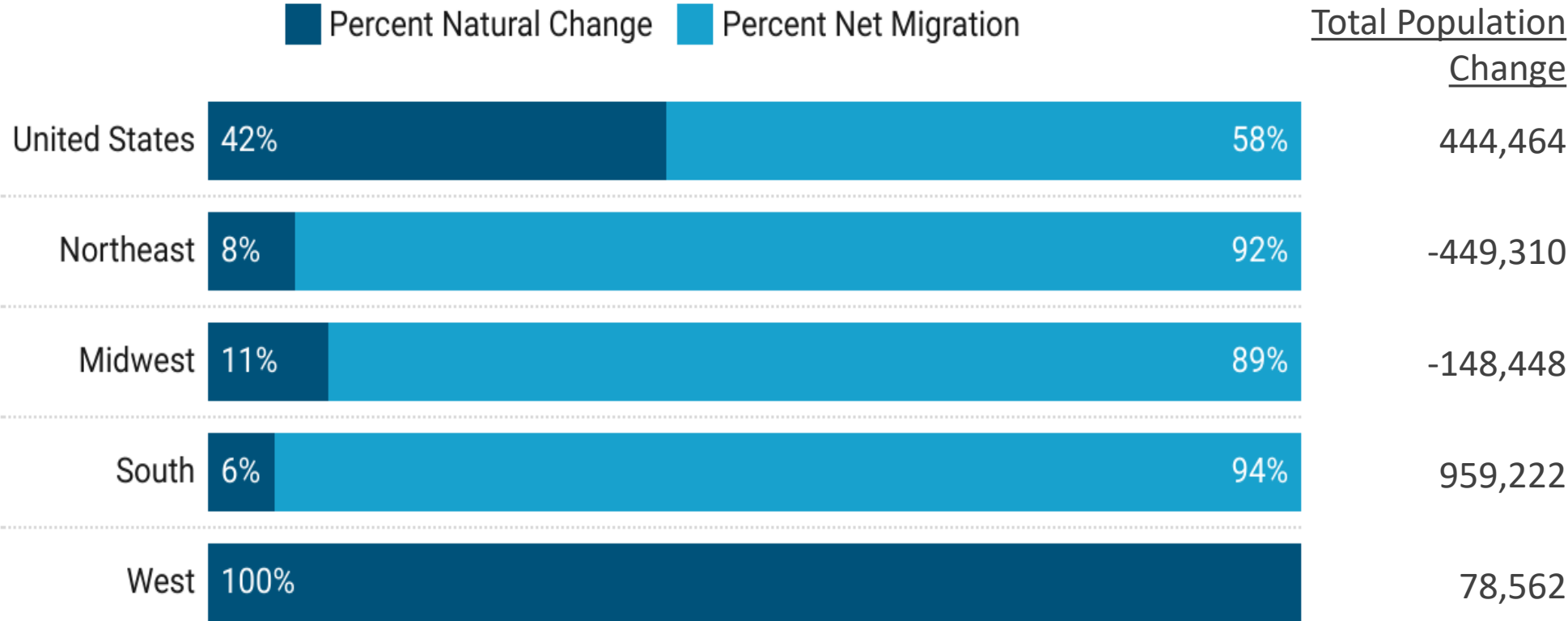
North Carolina's Population Boom

All that and a bag of chips plus dip!

The South's Share of U.S. Net Population Growth 1910-2020

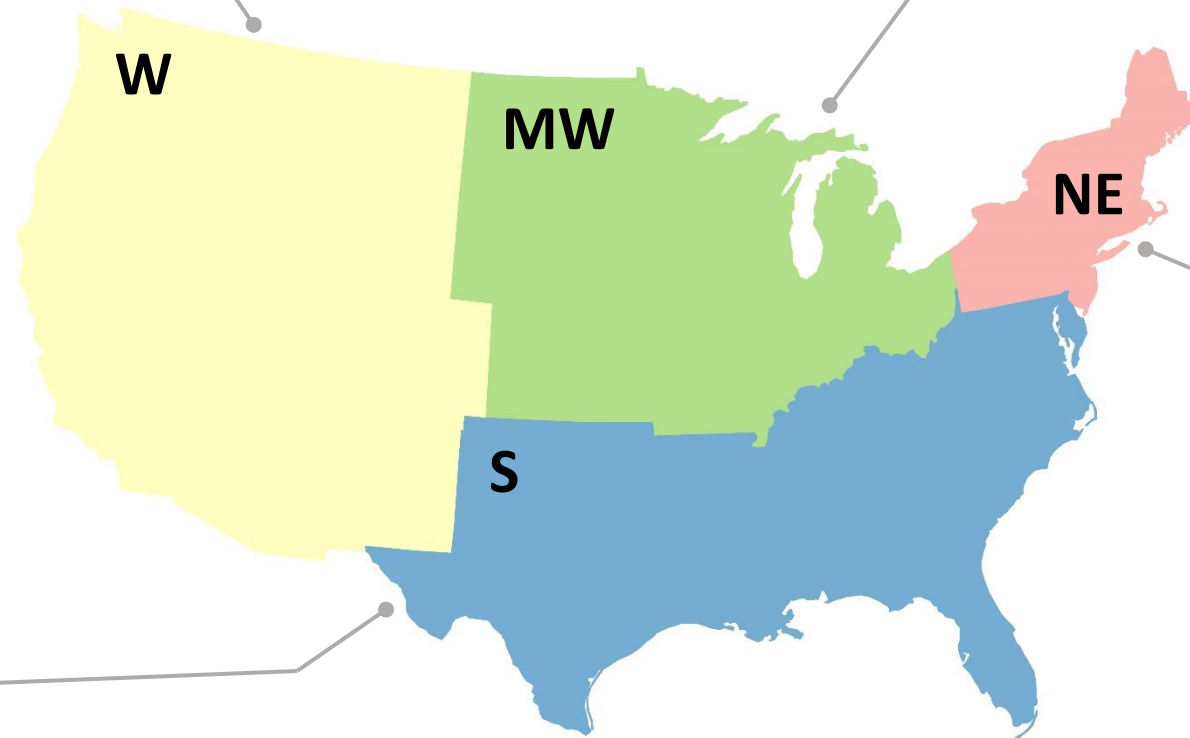


Components of Population Change, April 1, 2020 to July 1, 2021



Net Migration by Region, United States, 2020-2021

Type of Migrant	Migrants /Day	Total
Internal	+296	+108,000
Abroad	+394	+144,000
Internal + Abroad	+690	+252,000

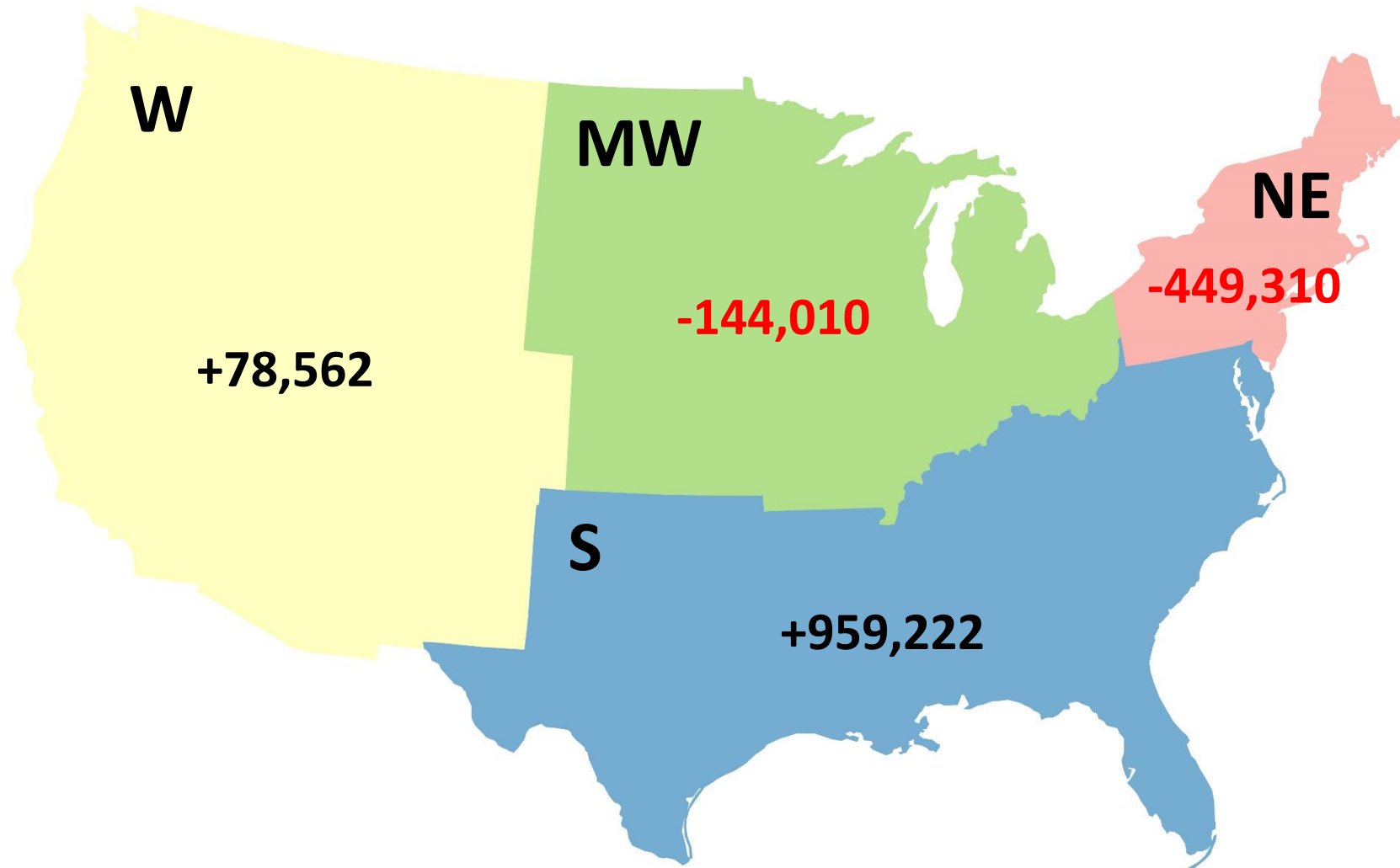


Type of Migrant	Migrants /Day	Total
Internal	-367	-134,000
Abroad	+173	+63,000
Internal + Abroad	-194	-71,000

Type of Migrant	Migrants /Day	Total
Internal	+693	+263,000
Abroad	+885	+313,000
Internal + Abroad	+1,578	+576,000

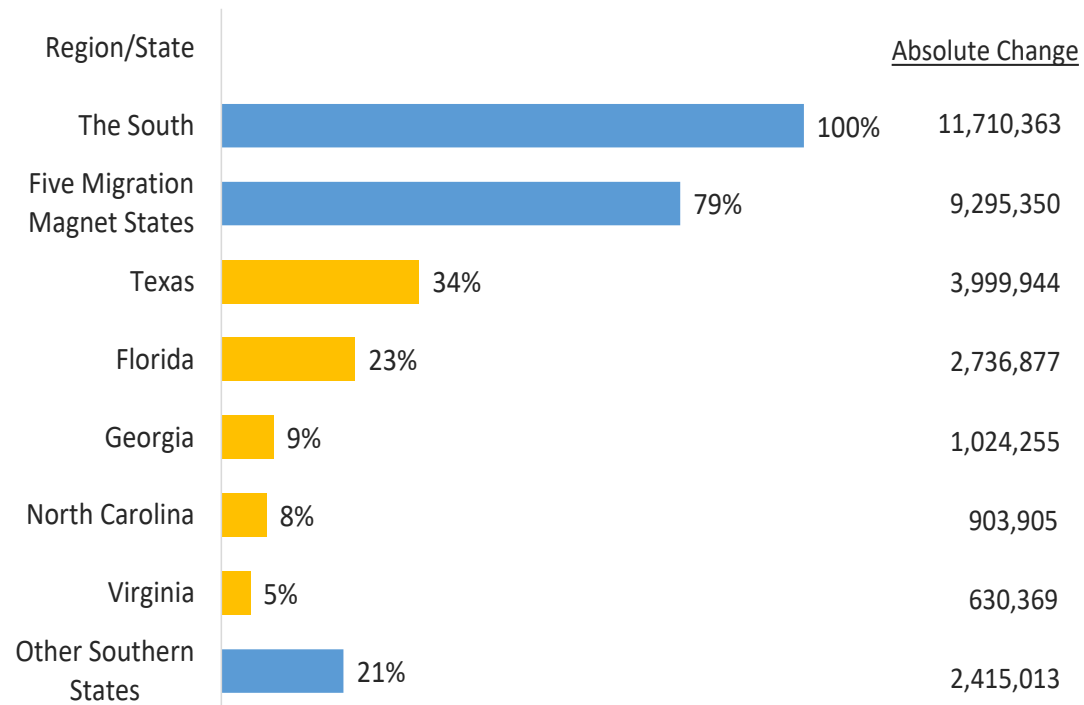
Type of Migrant	Migrants /Day	Total
Internal	-622	-227,000
Abroad	+222	+81,000
Internal + Abroad	-400	-146,000

Cumulative Population Change by Region, April 1, 2020 to July 1, 2021

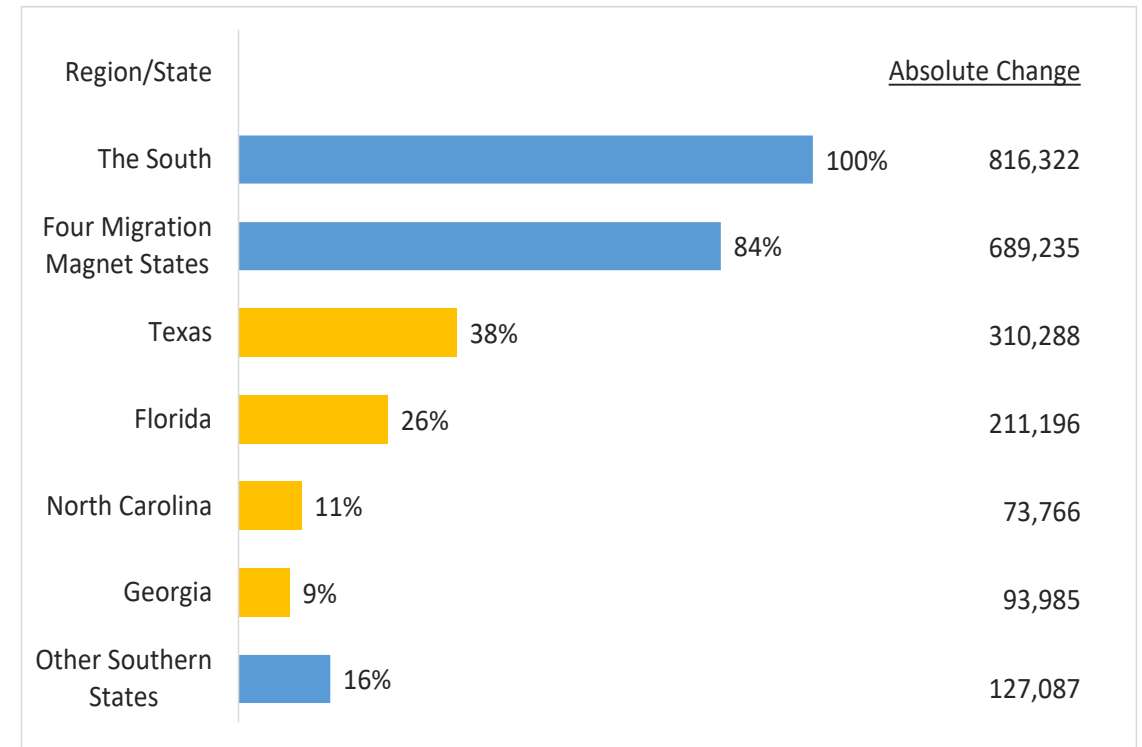


State Shares of South's Net Growth

2010-2020























2020-2021



North Carolina Population Change, 1990-2020











Census Period	Absolute Change	Percent Change
1990-2000	1,420,676	21.4
2000-2010	1,486,170	18.5
2010-2020	903,905	9.5
1990-2020	3,810,751	59.2

Top 10 Net Exporters and Net Importers of Population, U.S. States, 2017

Net Exporters		Net Importers		
<u>Absolute Number</u>	<u>Migrants/Day</u>	<u>State</u>	<u>Migrants/Day</u>	<u>Absolute Number</u>
-167,328	-458	New York		
-144,343	-395	Illinois		
-137,895	-378	California		
-72,855	-200	New Jersey		
-29,376	-80	Louisiana		
-26,734	-73	Massachusetts		
-20,140	-55	Hawaii		
-18,246	-50	Maryland		
-15,646	-43	Connecticut		
-13,506	-37	Kansas		
		Florida		326
		Arizona		270
		North Carolina		194
		Washington		170
		Texas		157
		Oregon		110
		South Carolina		103
		Tennessee		99
		Nevada		95
		Colorado		89

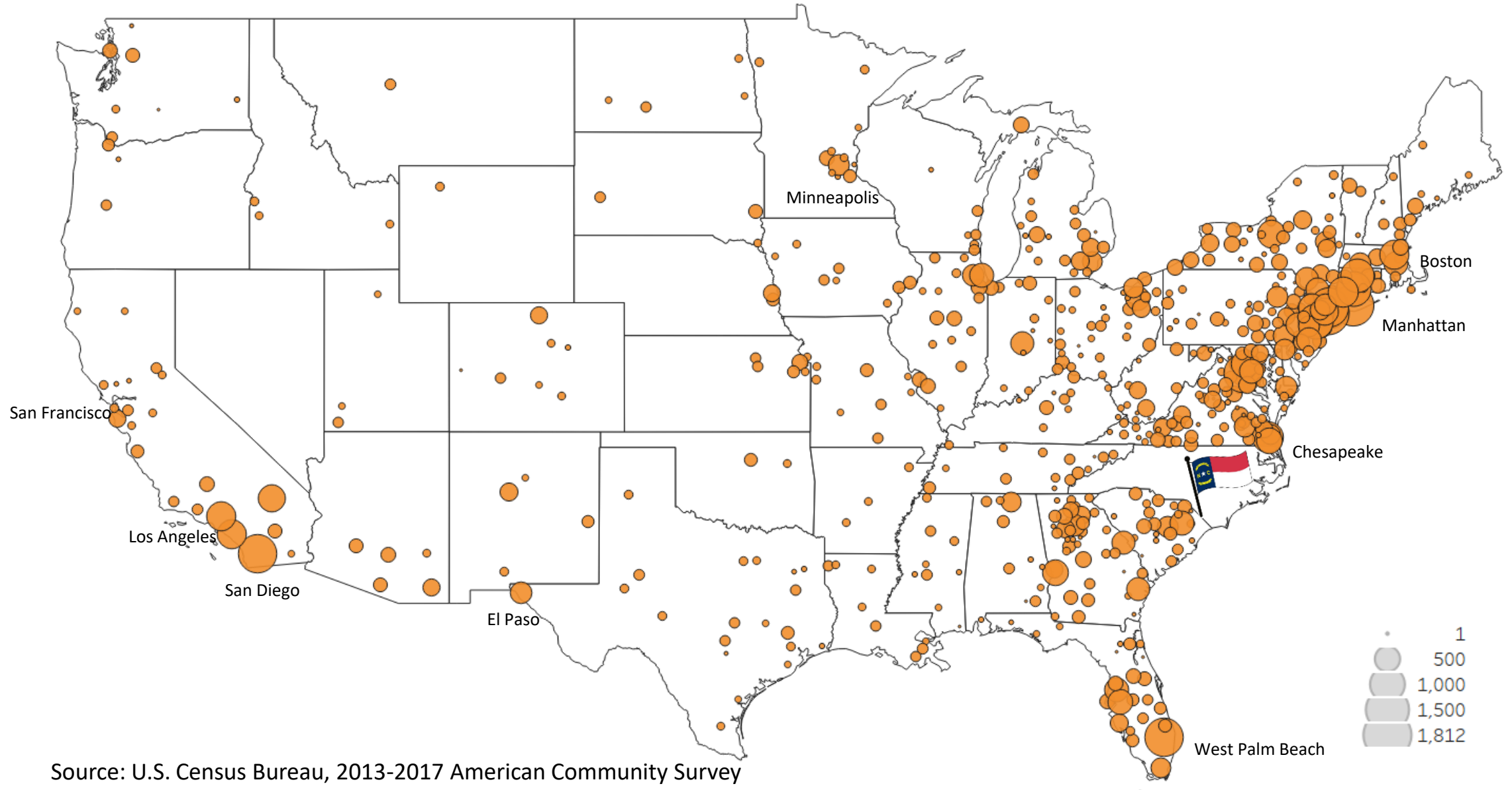
Source: U.S. Census Bureau, 2017 American Community Survey

Net Migration to North Carolina, 2010-2018

Year	Migrants/Day	Absolute Number
2010-2018		+151 495,379
2018		+218 79,731
2017		+194 70,628
2016		+204 74,333
2015		+201 73,406
2014		+103 37,585
2013		+79 28,832
2012		+94 34,486
2011		+110 40,144
2010		+154 56,231

Source: American Community Survey, State to State Migration Flows, 2010-2018

Origins of North Carolina Migration Flows, 2013-2017



Source: U.S. Census Bureau, 2013-2017 American Community Survey

Net Migration Trends By Region and Major Demographic Group, 2017-2021

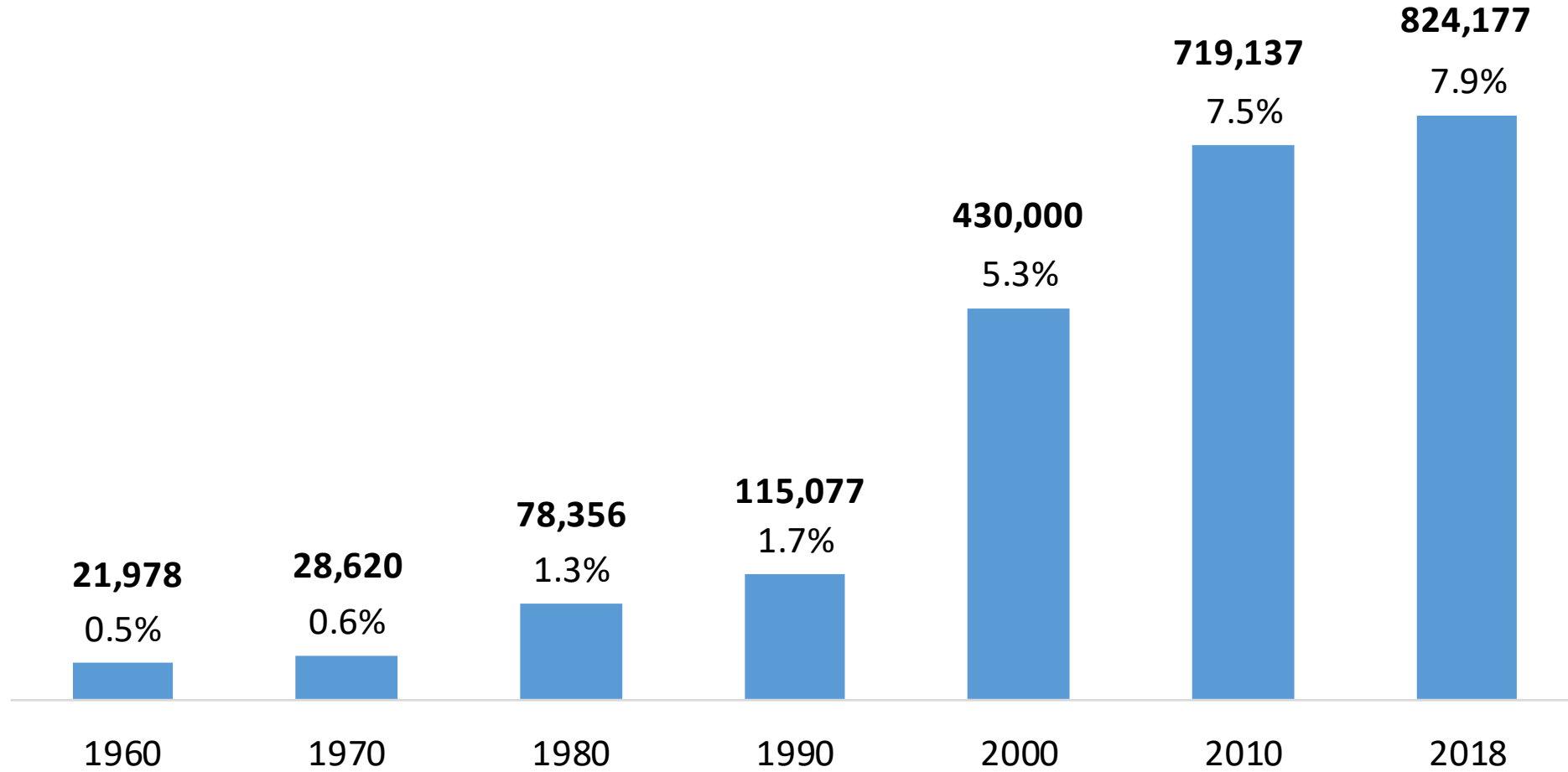
	Northeast	Midwest	South	West
Total	-982	-209	1,398	-206
White	-519	-67	628	-40
Black	-101	-85	271	-85
Asian	-44	-87	141	-9
Hispanic	-270	-62	342	-10
Elderly	-55	-25	26	29
Native born	-783	-141	961	-206
Foreign born	-200	-69	269	0

(numbers in thousands)

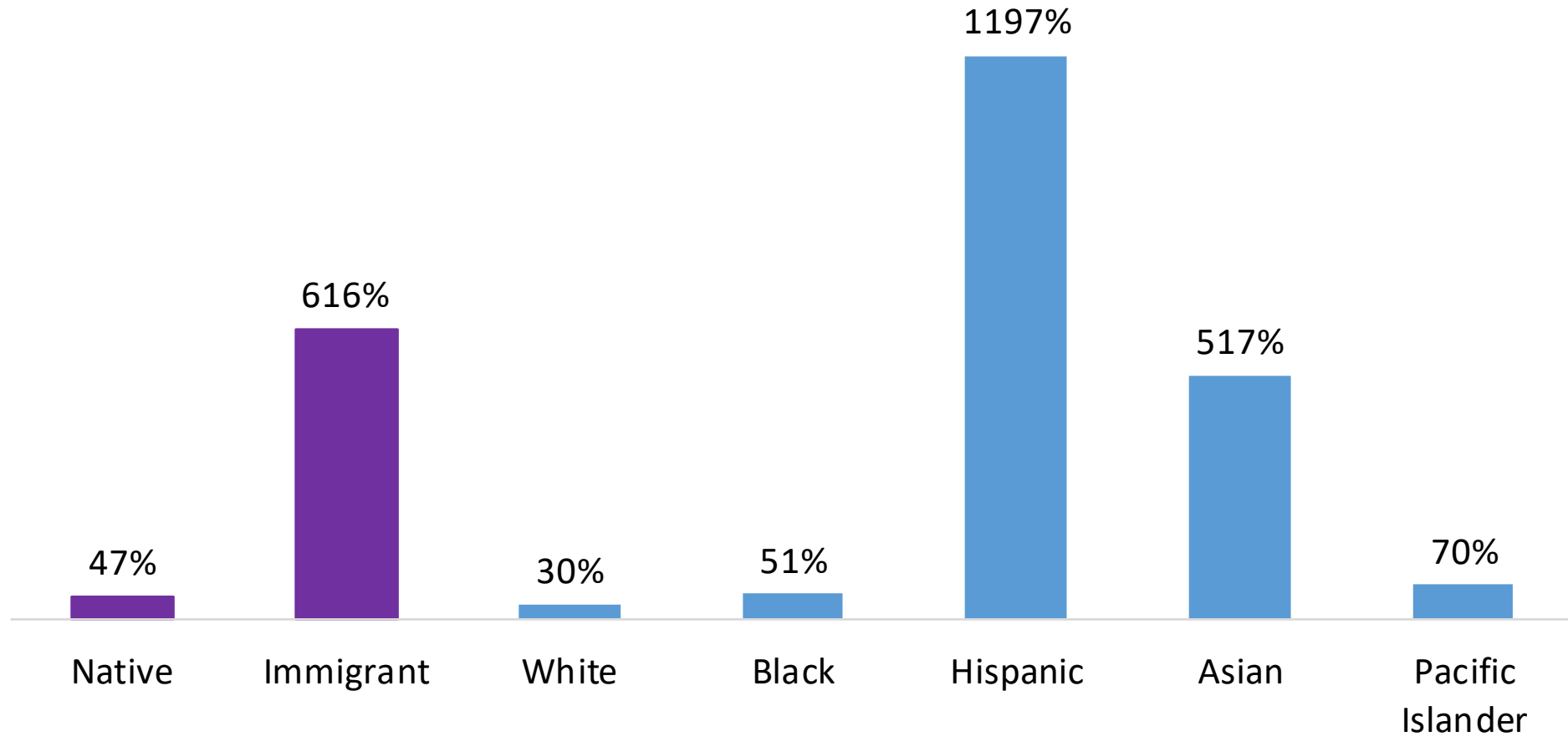
■ = Net Import

■ = Net Export

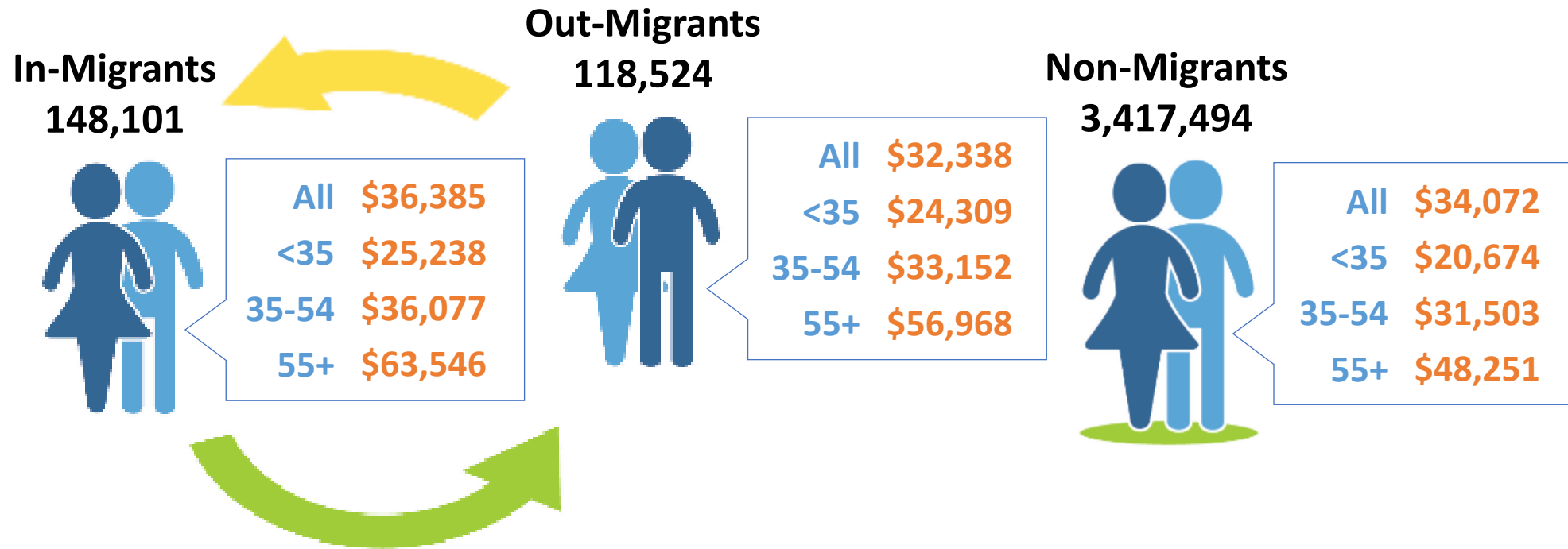
North Carolina Foreign Born Population Growth, 1960-2018



North Carolina Population Growth by Nativity, Race, and Ethnicity, 1990-2018



Per Capita Adjusted Gross Income (AGI) of North Carolina In-Migrants, Out-Migrants and Non-Migrants by Age, 2017-2018



Source: IRS, Statistics of Income Division, Individual Master File, December 2019

Demographic Winners & Losers



North Carolina's Growth Magnets, 2010-2020

County		Percent of Growth (Net Growth: 903,965)	
Wake	228,417	47%	95%
Mecklenburg	195,854		
Durham	57,246	64%	
Guilford	52,893	84%	
Cabarrus	47,793		
Johnston	47,121	95%	
Union	36,975		
Forsyth	31,920		
Buncombe	31,134		
Brunswick	29,262		
Iredell	27,256		
Onslow	26,804		
New Hanover	23,035		
Gaston	21,857		
Alamance	20,284		

Pandemic Refugees Driving NC Growth

- *“...wow, do we need affordable housing...with people fleeing the city, every house that’s for sale [in this community] is gone. They’re [outsiders] are buying these houses sight unseen; they’re coming here. They don’t even go in the home; they’re buying them online, and they’re fleeing the city. I’ve got people from New York, Pennsylvania, Tennessee, Florida. They’re all coming here. There’s no affordable housing. That was a problem before the pandemic, now it is a real problem”* (western NC key informant).

- *“We had a billion dollars—one billion dollars in residential real estate sales in the high-country region for the year 2020. A lot of those folks are relocating from Charlotte, Raleigh, Atlanta, wherever they come from, driving up the property values as well as they come, to the point that any parcel that we could have ever thought about for some sort of [affordable] housing project is so astronomically priced now that it makes it not cost effective.”*

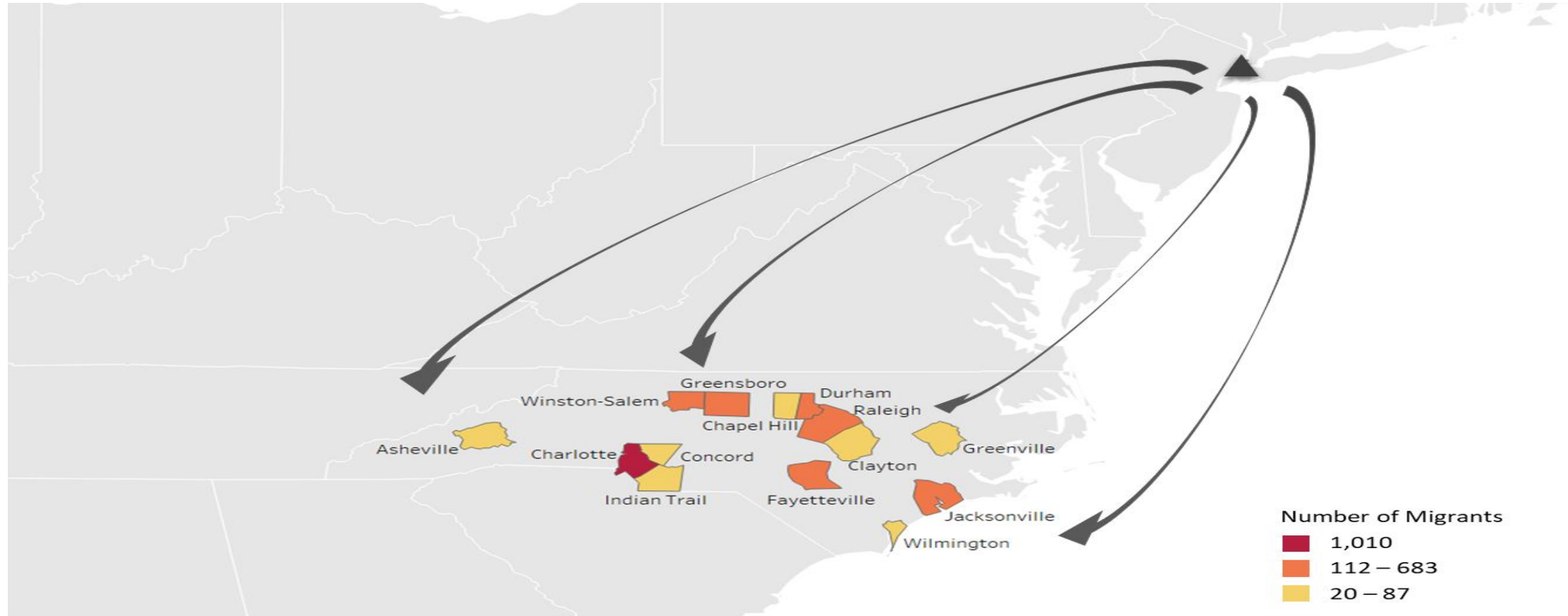
He concluded,

- *“So, while in the short-term we’ve got some economic flow in our county, if you were a real estate agent or a construction worker you were doing ok. But long-term, that’s just going to make a hard issue [affordable housing] even worse”* (another western NC key informant).

Pandemic Refugees Driving Growth

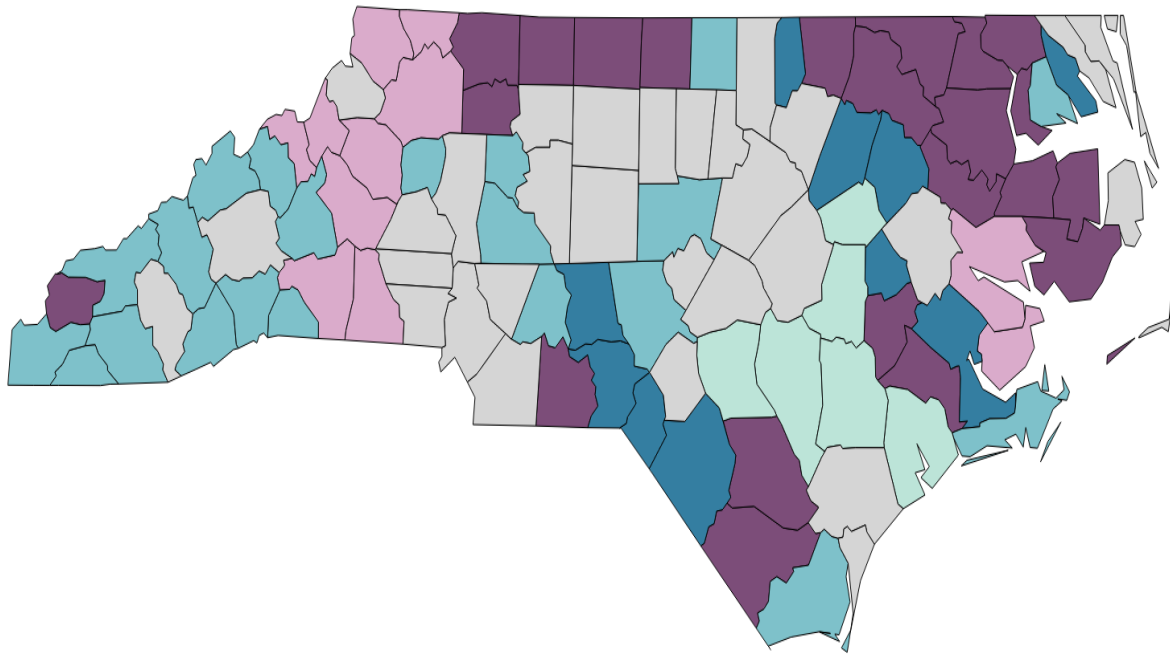
- *“What I’ve seen...our population changed. We’re a population of 17,800 people...but...we’re eight golf courses and two ski resorts. So, all these people that are normally not here chose to flee the city and come to their homes in the mountains [during the pandemic]. So, our population is probably 27,000 people. And that did put a strain ...on services that the county provided” (western NC key informant)*

New York City, NY - Out Migration Fields in North Carolina, 2017-2018



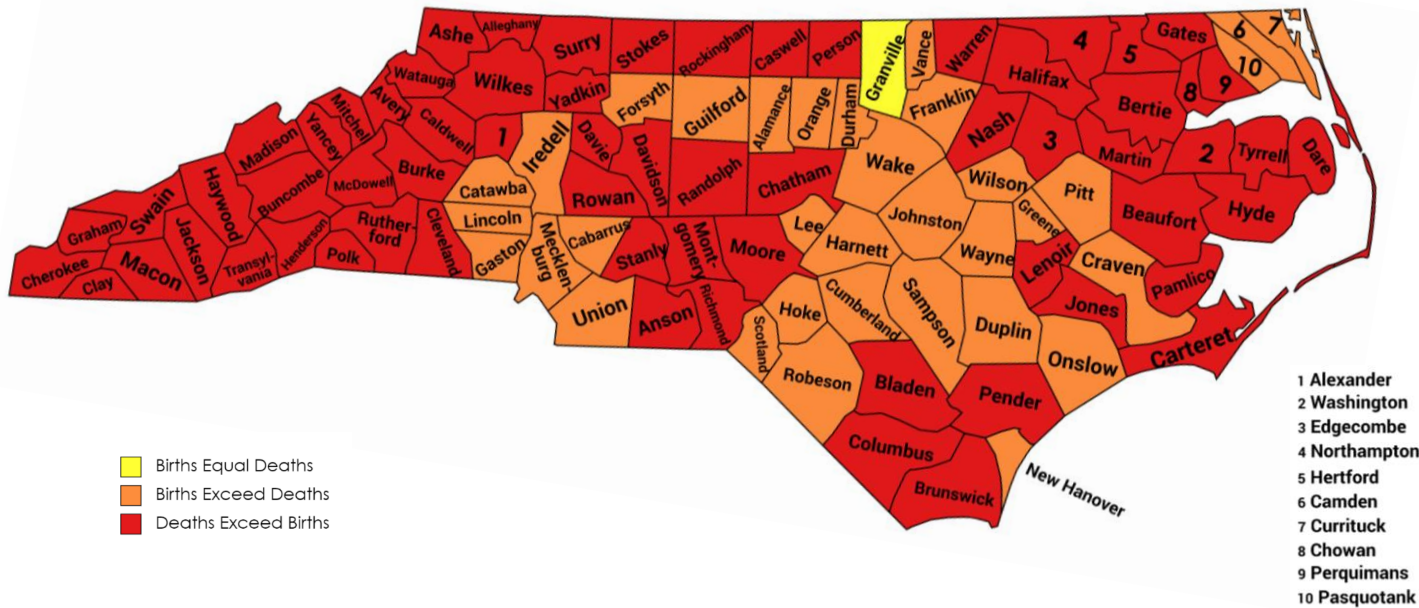
Source: IRS Migration File

Demographic Change Typology, North Carolina Counties, 2010-2019



- Balanced Growth
- Natural Growth
- Migration Magnet
- Emptying Out
- Biologically Declining
- Dying

North Carolina Vital Statistics, Total Population, 2019



Demographic Weather Alert!

- *Current worker shortages as the nation and NC attempt to rebound from the pandemic-induced economic recession merely represents the eye of the impending demographic storm.*



U.S. & N.C. Gale Force Demographic Wind Gusts

Slowing Total and Foreign-born population growth & White Population Loss

Below Replacement Level fertility

Deaths of Despair & Declining life expectancy

Involuntary Retirements of 55 and older population

Declining female labor force participation.

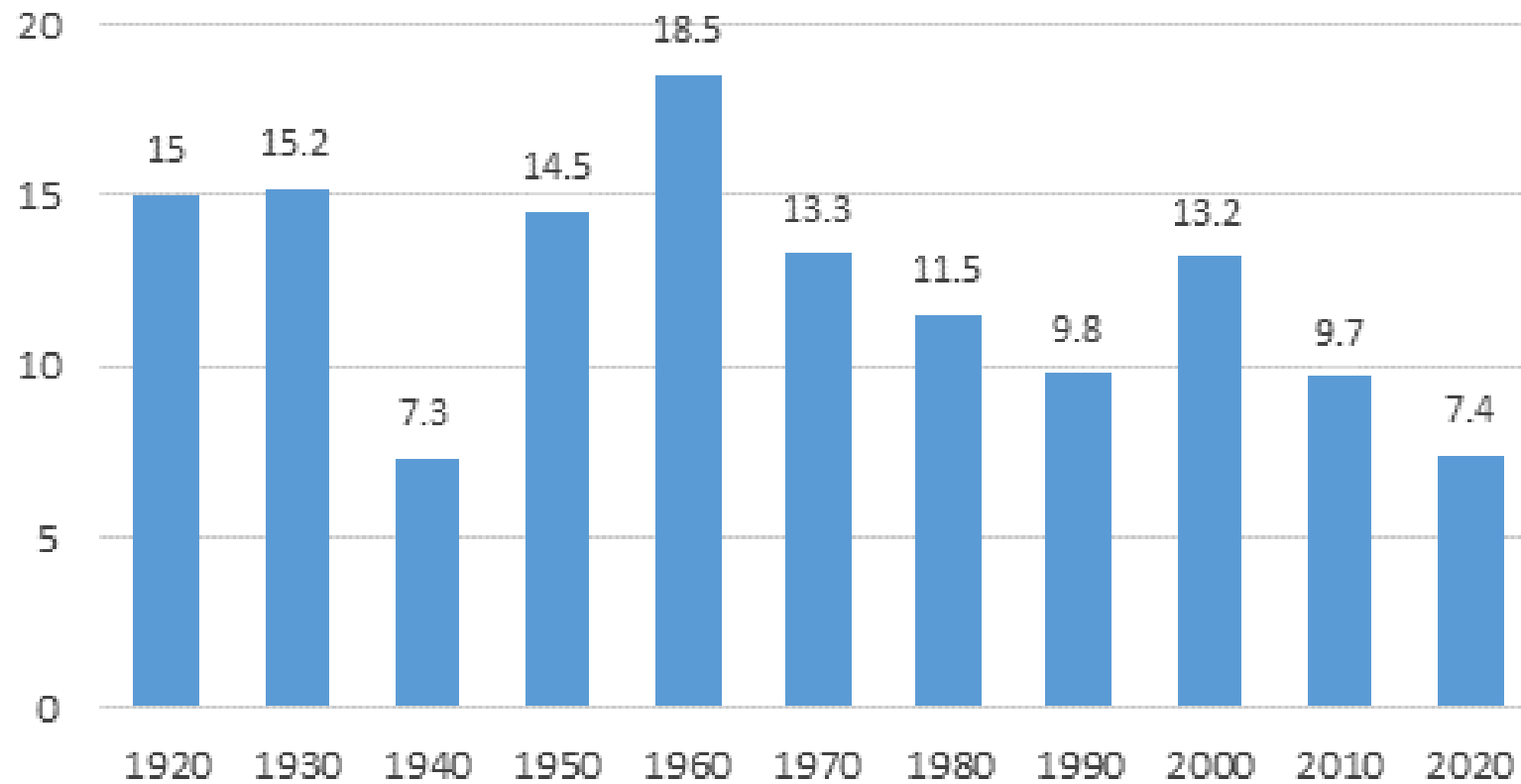




Slowing Total Population Growth

Gale Force Wind Gust #1

Percent Increase in U.S. Population, 1920-2020



Absolute & Percent Change in Total Population, U.S. & N.C., 1990-2020

United States

Census Period	Absolute Change	Percent Change
1990-2000	32,712,033	13.2
2000-2010	27,323,632	9.7
2010-2020	22,703,743	7.4

North Carolina

Census Period	Absolute Change	Percent Change
1990-2000	1,420,676	21.4
2000-2010	1,486,170	18.5
2010-2020	903,905	9.5



Slowing Foreign-Born Population Growth

Gale Force Wind Gust # 2

Foreign Born Population Change, U.S. & N.C., 1990-2019

United States

Census Period	Absolute Change	Percent Change
1990-2000	11,340,573	57.4
2000-2010	7,567,123	24.3
2010-2019	5,336,858	13.7
2016-2019 (Trump Years)	1,193,556	2.7

North Carolina

Census Period	Absolute Change	Percent Change
1990-2000	314,923	273.7
2000-2010	289,646	67.3
2010-2019	164,985	22.9
2016-2019 (Trump Years)	94,993	12.0



White Population Decline

Gale Force Wind Gust #3

Absolute & Percent White Population Change, U.S. & N.C., 1990-2020

United States

Census Period	Absolute Change	Percent Change
1990-2000	6,424,478	3.4
2000-2010	2,264,778	1.2
2010-2020	-5,119,905	-2.6

North Carolina

Census Period	Absolute Change	Percent Change
1990-2000	676,028	13.5
2000-2010	576,840	10.2
2010-2020	88,153	1.4

Non-Hispanic White Shares of Net Population Growth, 1990-2020



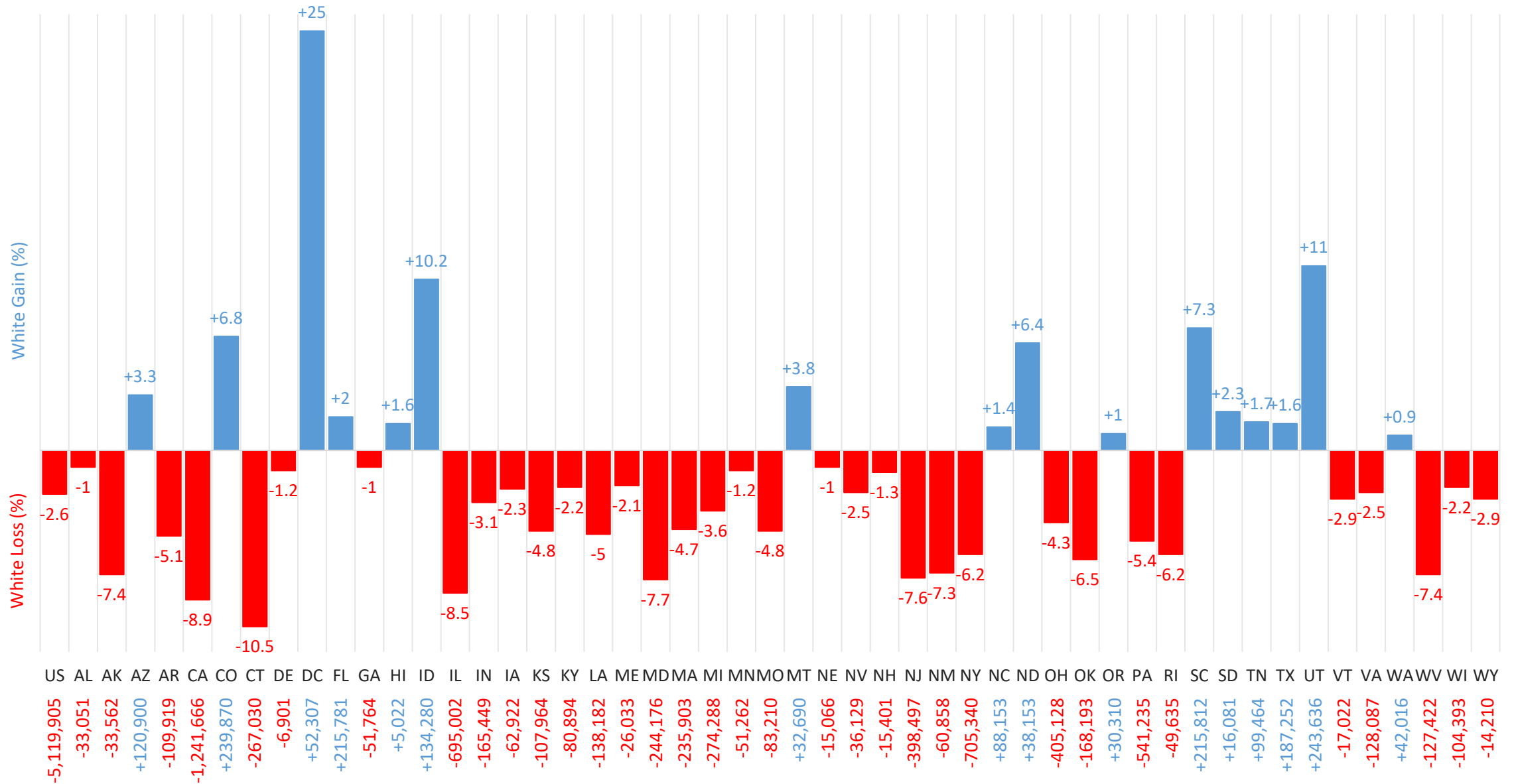
Declining Shares of Net Growth

Decade	Share of Net Growth
1990-2000	19.6
2000-2010	8.2
2010-2020	0.0

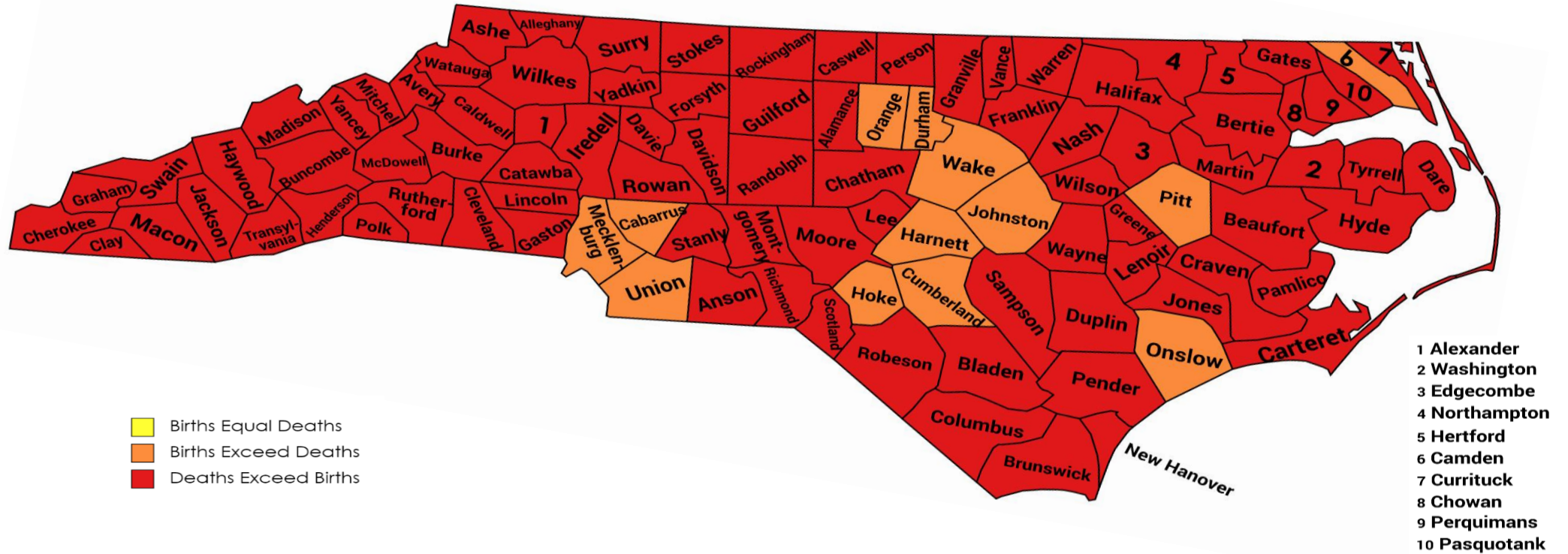
Absolute & Percent Change in U.S. White Population by Region, 2010-2020

Area	2020 White Population	Absolute Change in White Population 2010-2020	Percent Change in White Population 2010-2020
United States	196,697,647	-5,119,905	-2.6
Northeast	35,752,998	-2,255,096	-5.9
Midwest	50,082,552	-2,014,081	-3.9
South	65,754,358	-1,229,817	-1.8
West	37,468,662	-537,701	-1.4

States Losing and Gaining White Population, 2010-2020



North Carolina Vital Statistics, White Population, 2019



A pair of white, knitted baby booties with small bows on the ankles, resting on a blue textured surface. The booties are positioned in the lower right quadrant of the frame. The background is a solid blue color with a fine, pebbled texture.

Declining Fertility

Gale Force Wind Gust #4

Total Fertility Rate in the United States in 2019, by Ethnicity of Mother

Race/Ethnicity	Total Fertility Rate
All	1.7
Native Hawaiian/Other Pacific Islander	2.2
Hispanic	1.9
Black (non-Hispanic)	1.8
American Indian/Alaskan Native	1.6
White (non-Hispanic)	1.6
Asian	1.5

Key Drivers of Fertility Declines

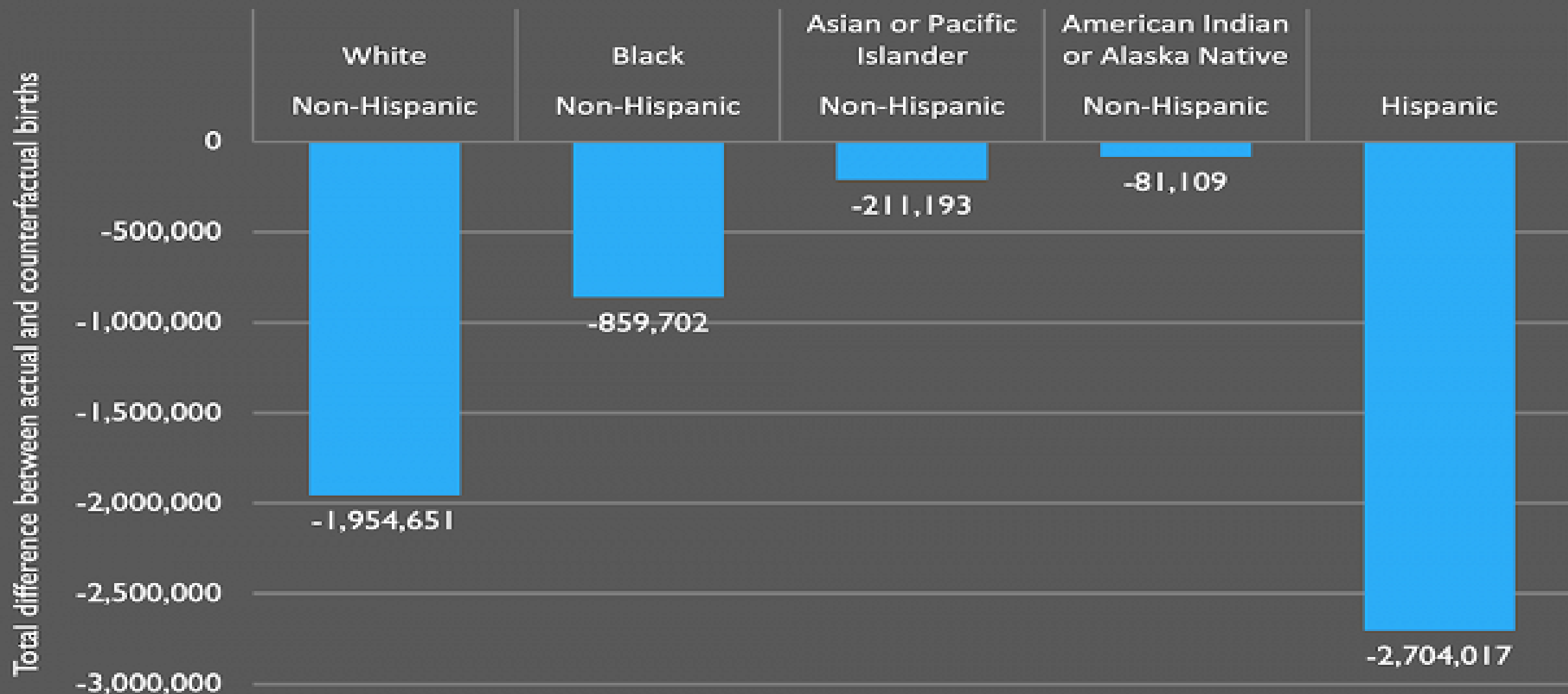
Increasing Labor Force Participation & Career Orientation of Women

Women having fewer children

Some women opting not to have children—voluntary childlessness.

Women aging out of the childbearing years

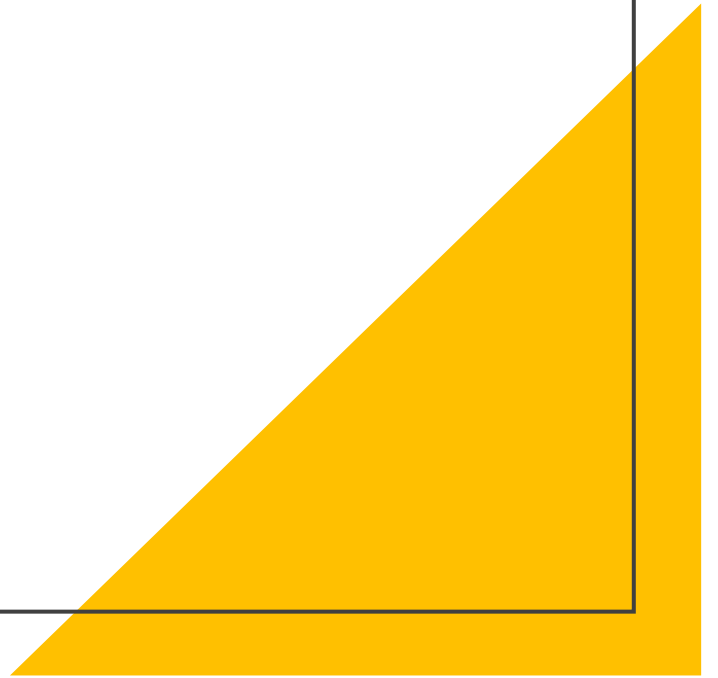
Figure 1: Difference Between Actual Births and Births if 2008 Fertility Rates Had Persisted, 2009-2019



Source: CDC WONDER data, author's calculations

Deaths of Despair

Gale Force Wind Gust #5





Deaths of Despair & Declining Life Expectancy

*Suicide, alcohol, drug,
and coronavirus-related
deaths creating a
demographic depression*



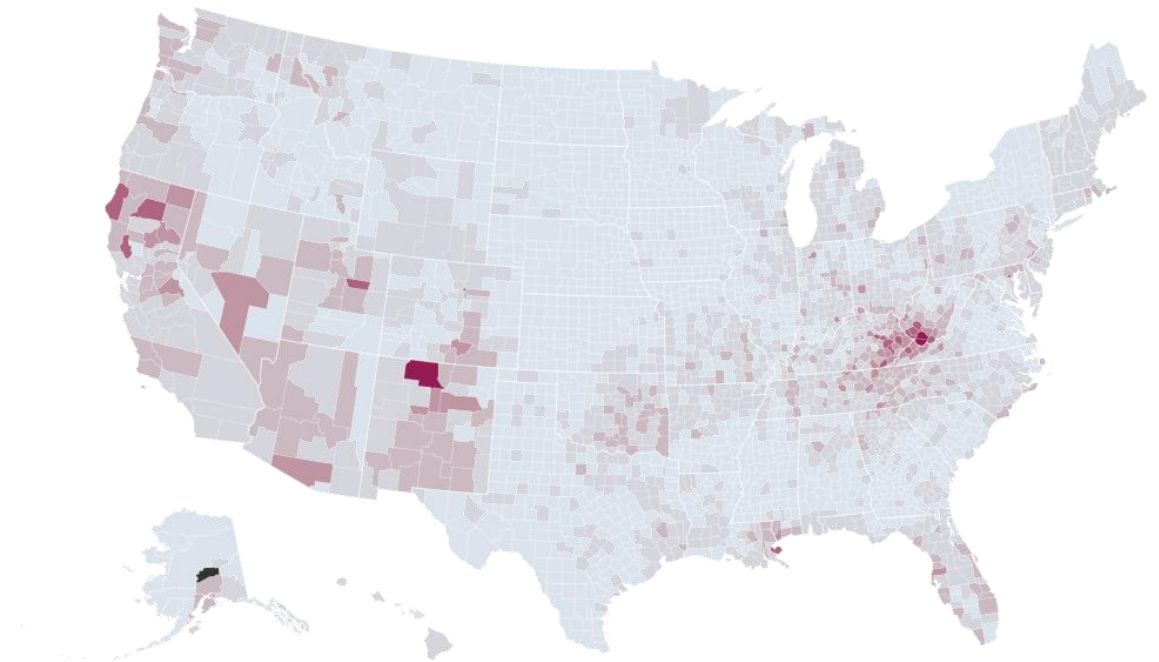
The Drug Overdose Crisis in 1999

Drug overdose deaths per 100,000:

0-4 4.1-8 8.1-12 12.1-16 16.1-20 >20



1999 2014





Drug overdose deaths per 100,000:

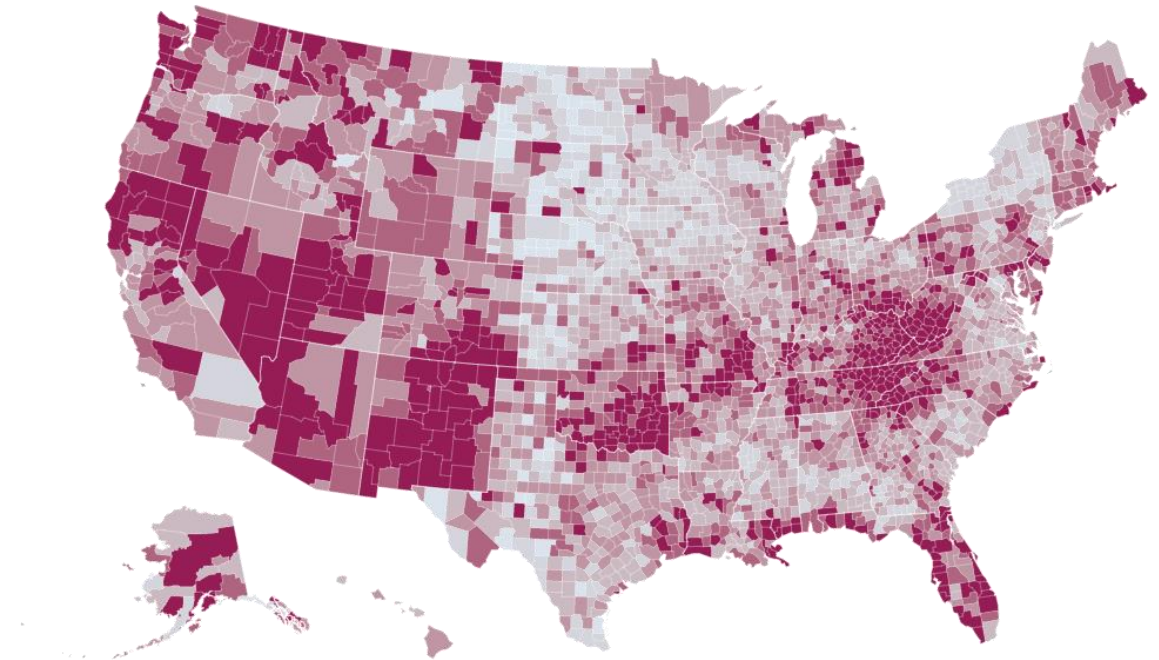
0-4 4.1-8 8.1-12 12.1-16 16.1-20 >20



The Drug Overdose Crisis in 2014

1999

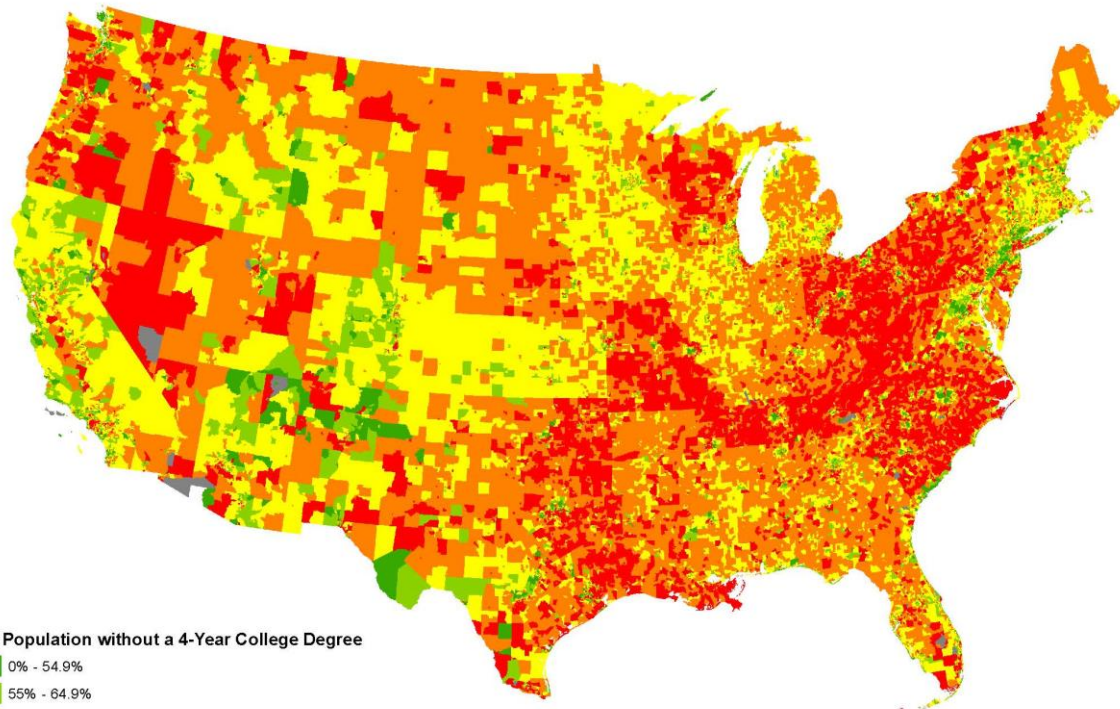
2014



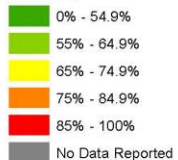
Population Experiencing a Demographic Depression

Deaths of Despair

In 2017 alone, there were 158,000 deaths of despair in the U.S., the equivalent of three fully loaded Boeing 737 Max jets falling out of the sky every day for a year (Karma, 2020).



% of Population without a 4-Year College Degree



North Carolina Opioid Statistics, 2018

Pills
Dispensed



445,002,000
Average: 43/person

Overdose
Deaths



1,718
Average: 5/day

Hospital Emergency
Department Visits



6,764
Average: 18/day

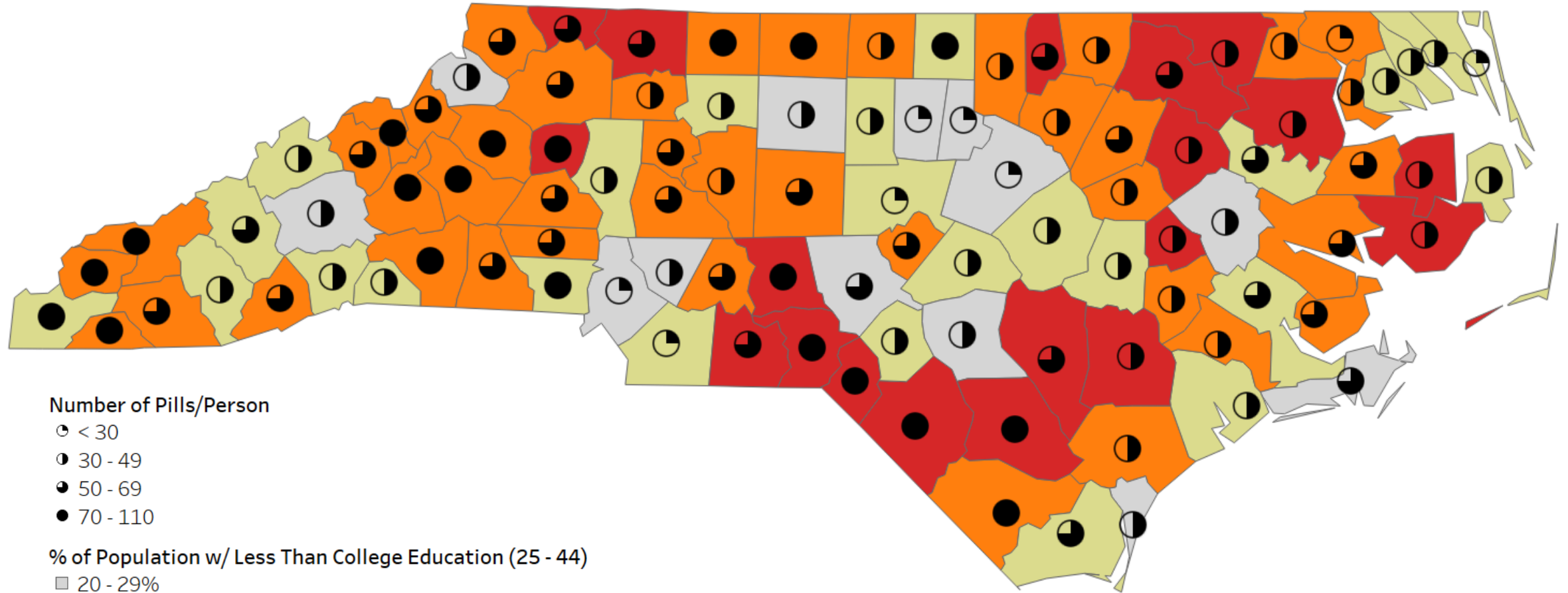
Naloxone
Reversals



3,723
Average: 10/day

Opioid Pills Dispensed Per Capita by County, 2018

(The State: 43 Pills/Person)



Number of Pills/Person

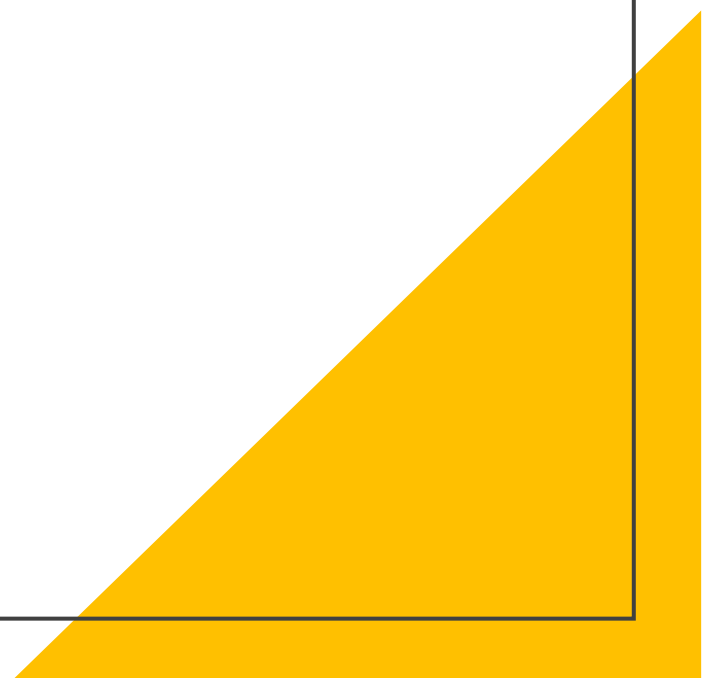
- < 30
- ◐ 30 - 49
- ◑ 50 - 69
- 70 - 110

% of Population w/ Less Than College Education (25 - 44)

- 20 - 29%
- ◻ 30 - 39%
- ◼ 40 - 49%
- 50% +

Complicating Matters

Coronavirus Pandemic



Reduced Life Expectancy Due to Covid-19 Pandemic



Group	Years Shortened	Life Expectancy at Birth
All Races	1.13 years	77.48
Blacks	2.10 years	72.78
Latinos	3.05 years	78.77
Whites	0.68 years	77.84

Drug Overdose Deaths Soar During the Pandemic

- CDC data indicate there were 90,000 drug overdose deaths in 2020, representing a 21,000 or 30% increase over the 2019 death toll.

- Commenting on these recently released statistics, a Stanford University expert on addiction and drug policy is quoted as saying,

It's terrifying. It's the biggest increase in overdose deaths in the history of the United States, it's the worst overdose crisis in the history of the United States, and we're not making progress. It's really overwhelming.

- For far too many individuals struggling with drug addiction, the pandemic-induced forced isolation combined with the shutdown of in-person drug treatment and counseling services proved to be deadly.

- According to the CDC the 2020 casualties brings the total to more than 900,000 overdose deaths since the U.S. drug epidemic began in the late 1990s.

U.S. Drug Overdose Deaths Spike Amid the Pandemic

Number of drug overdose deaths in the United States*



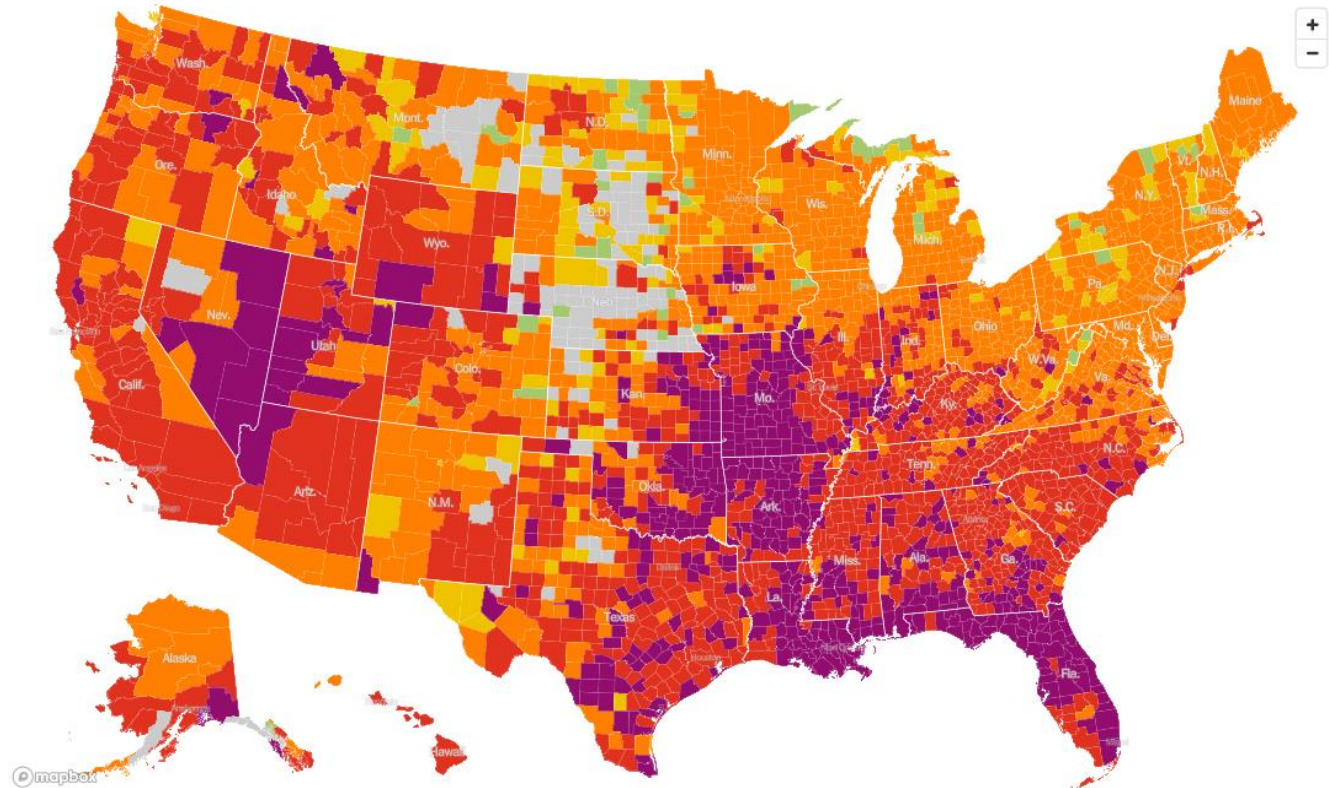
* Estimates for 2020 and 2021 are based on provisional data.

** 2021 estimate refers to 12-month period ending April 2021

Source: Centers for Disease Control and Prevention



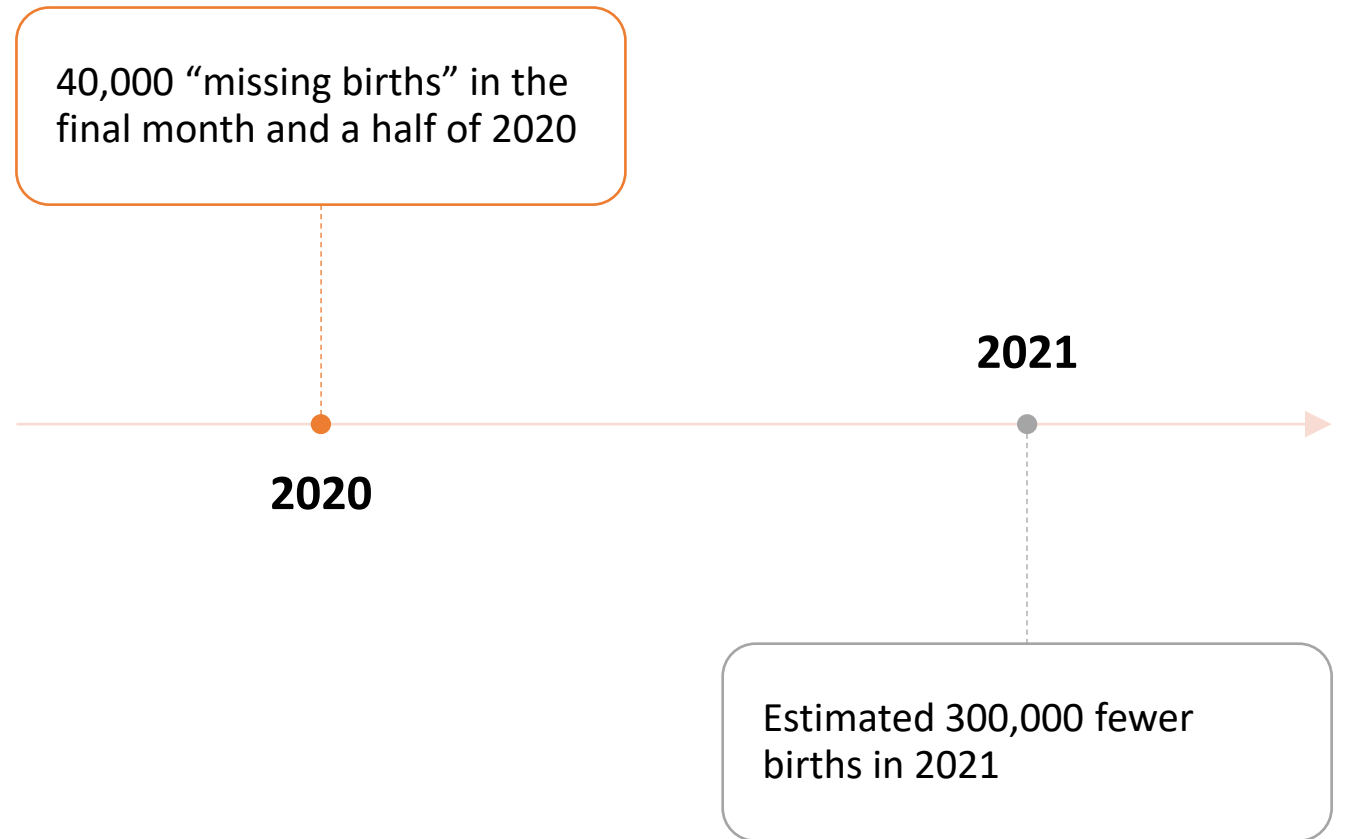
Covid-19 risk for unvaccinated people



Source: Covid-19 risk assessment by The New York Times and Resolve to Save Lives based on reported cases and test positivity data. [Read more below.](#)

LOW MODERATE HIGH VERY HIGH EXTREMELY HIGH

COVID-19's Impact on U.S. Fertility



Children's Lives Upended by "Orphanhood"

- *COVID-19 Drove an estimated 15% increase in Orphaned Children*

COVID-19 Deaths	Number of Children Orphaned
Primary Caregiver	122,000
Secondary Caregiver	22,000

Declining Female Labor Force Participation & Involuntary Retirements

Gale Force Wind Gusts #6 & #7

A large yellow triangle is positioned in the bottom right corner of the slide, pointing towards the top right.

Declining Female Labor Force Participation & Involuntary Retirements

Women's COVID-19 Burden

“And no offense to all the guys on this [Zoom], but it's [the pandemic] really been detrimental to women. The majority of the burden has been placed on not only the schooling, the childcare, the nutrition—it's a lot. I've seen women cry just like, 'I'm just so tired I don't know what to do'”

(Western NC key informant)



COVID-19 reportedly has forced more than 2 million women out of the workforce (Barry & Gupta, 2021).

COVID-19 Causalities

1.7 million workers 55 and older reportedly forced into involuntary retirement (Davis, et al, 2021).

Black workers without a college degree were more likely than other groups to involuntarily retire during the pandemic.

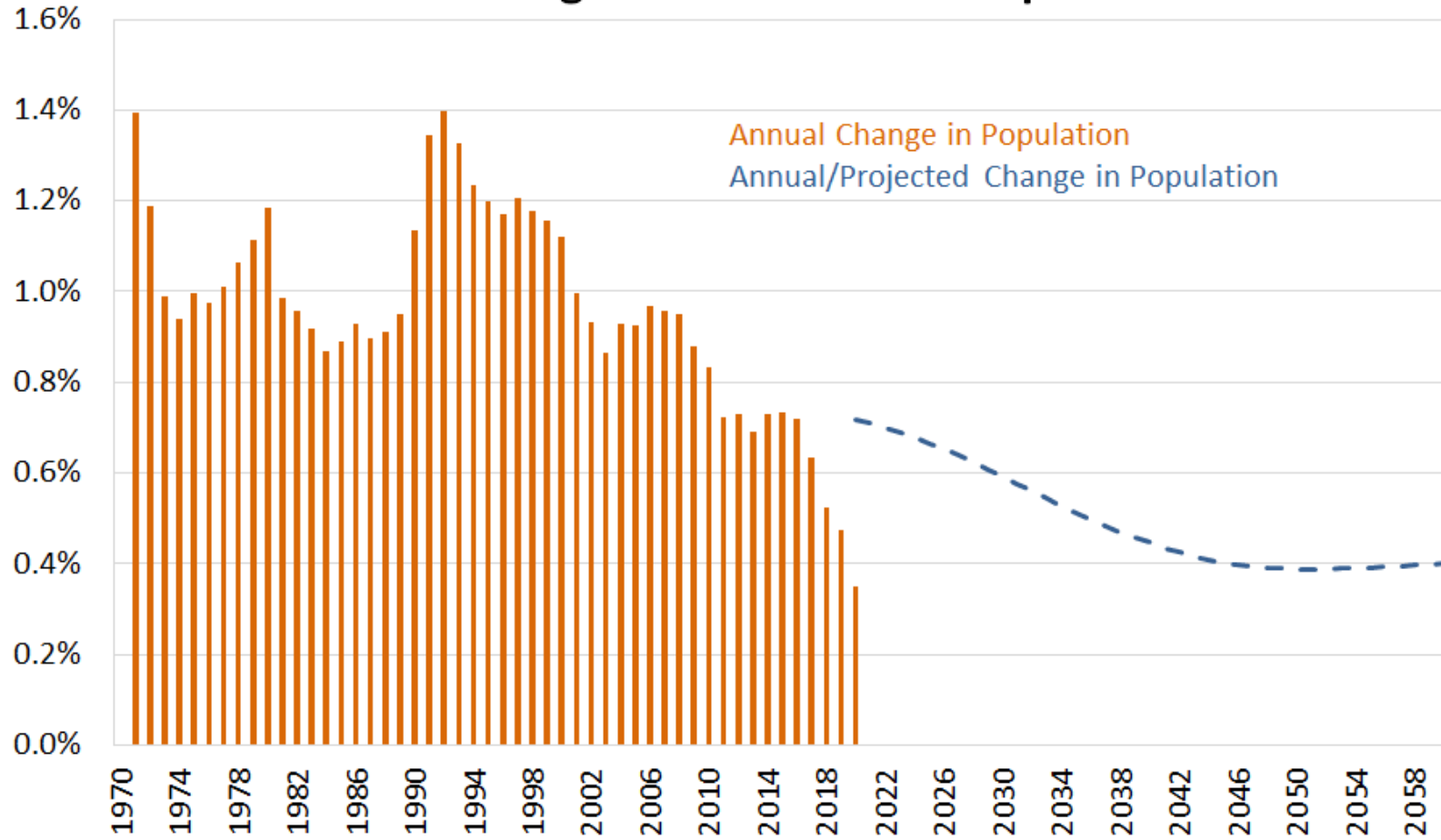
Involuntary retirees' median savings of \$9,000.00.

Key Takeaways

Addressing the Demographic Gale Force Wind Gusts



Annual Change in U.S. Resident Population



NOTES: The actual change in population is as of Dec. 22. The projected change is as of April 16 and displays the actual change from 1970 through 2019.

SOURCES: Census Bureau and Haver Analytics.

Recommendations for Action and Advocacy

Audit enterprises to ensure they inclusive and equitable places to work—demonstrated commitment to reputational equity.

Reform immigration laws in ways that reflect the critical role that immigrants must play in our economy and society more generally moving forward given slowing total population growth, white population losses, declining fertility, aging, and crisis-induced premature deaths of prime-working age individuals.

Encourage family-friendly business policies that support women having children and allow them the flexibility to provide and care for their offspring. Women—as both employees and leaders—are key to the future viability of U.S. business enterprises.

Attack the childcare crisis head on by seeding NC's expansive childcare deserts with accessible, high quality, and affordable day care and equipping facility owners and operators with strong business acumen.

Direct resources to address the root causes of deaths of despair and the racially disparate impact of the COVID-19 pandemic. We can no longer afford to continue to lose members of the prime-working age demographic to premature deaths. They make up the next generation of talent that must propel our nation in the hyper-competitive global economy.

Create encore entrepreneurship and workforce development training programs that provide pathways of re-entry into the post-pandemic economy for the 55+ population of involuntary retirees.

THE END



Questions

