

Disruptive Demographics: Challenges and Opportunities for the Philanthropic Community



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OVERVIEW

- Demographic Trends
- Challenges & Opportunities
- Discussion

what CENSUS 2010 will REVEAL



October 2013

6 DISRUPTIVE TRENDS

- The South Rises – Again
- The Browning of America
- Marrying Out is “In”
- The Silver Tsunami is About to Hit
- The End of Men?
- Cooling Water from Grandma’s Well...
and Grandpa’s Too!



The South

Continues To Rise

...Again!

SOUTH'S SHARE OF U.S. NET POPULATION GROWTH, SELECTED YEARS, 1910-2010

Years	U.S. Absolute Population Change	South's Absolute Population Change	South's Share of Change
1910-1930	30,974,129	8,468,303	27%
1930-1950	28,123,138	9,339,455	33%
1950-1970	51,886,128	15,598,279	30%
1970-1990	45,497,947	22,650,563	50%
1990-2010	60,035,665	29,104,814	49%

U.S. POPULATION CHANGE BY REGION, 2000-2010

Region	2010 Population	Absolute Population Change, 2000-2010	Percent Population Change, 2000-2010
U.S.	309,050,816	26,884,972	9.5%
Northeast	55,417,311	1,753,978	3.3%
Midwest	66,972,887	2,480,998	3.0%
South	114,555,744	14,318,924	14.3%
West	72,256,183	8,774,852	13.8%
North Carolina	9,535,483	1,486,170	18.5%

SHARES OF NET POPULATION GROWTH BY REGION, 2000-2010

Region	Absolute Population Change	Percent of Total
UNITED STATES	26,884,972	100.0
NORTHEAST	1,753,978	6.0
MIDWEST	2,480,998	9.0
SOUTH	14,318,924	53.0
WEST	8,774,852	32.0

NET MIGRATION TRENDS, 2000-2008

	Northeast	Midwest	South	West
Total	-1,032	-2,008	+2,287	+46
Black	-346	-71	+376	+41
Hispanic	-292	-109	+520	-117
Elderly	-115	+42	+97	-27
Foreign born	-147	-3	+145	+3



= Net Import



= Net Export

GROSS AND NET MIGRATION FOR THE SOUTH, 2004-2010

The Region

Years	Domestic			Foreign		
	In	Out	Net	In	Out	Net
2004-2007	4,125,096	3,470,431	654,665	268,619	132,382	136,237
2007-2010	3,874,414	3,477,899	396,525	232,501	132,201	100,300

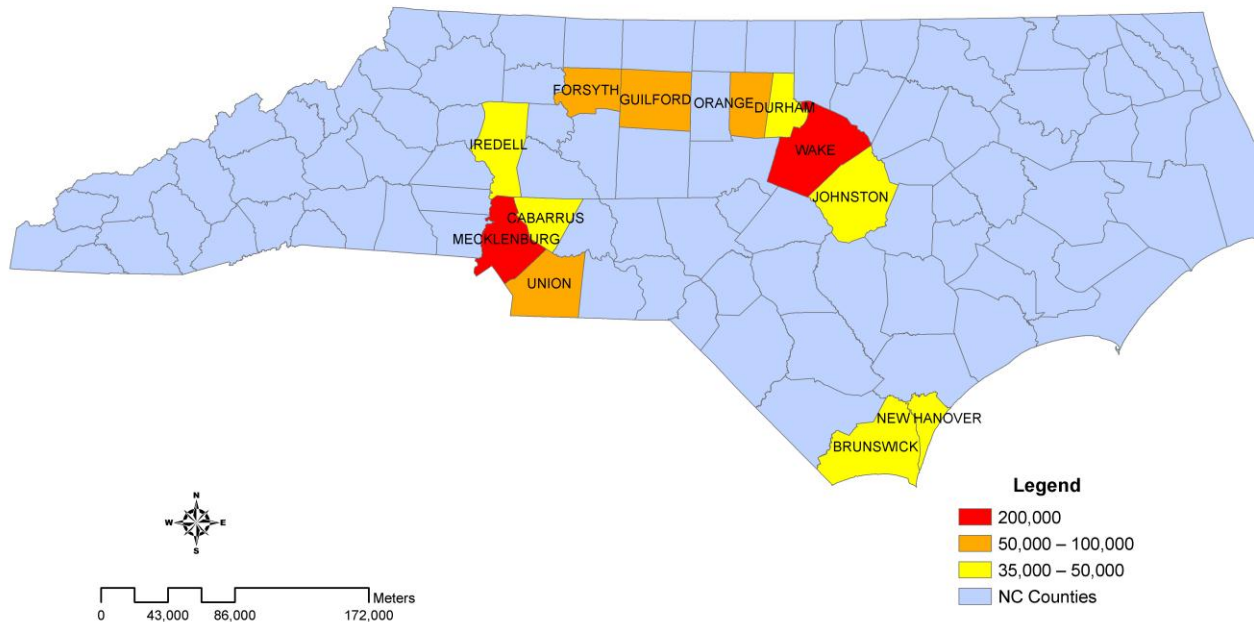
Florida

Years	Domestic			Foreign		
	In	Out	Net	In	Out	Net
2004-2007	812,053	630,051	182,002	41,745	24,108	17,637
2007-2010	654,931	668,087	-13,156	33,095	32,094	1,001

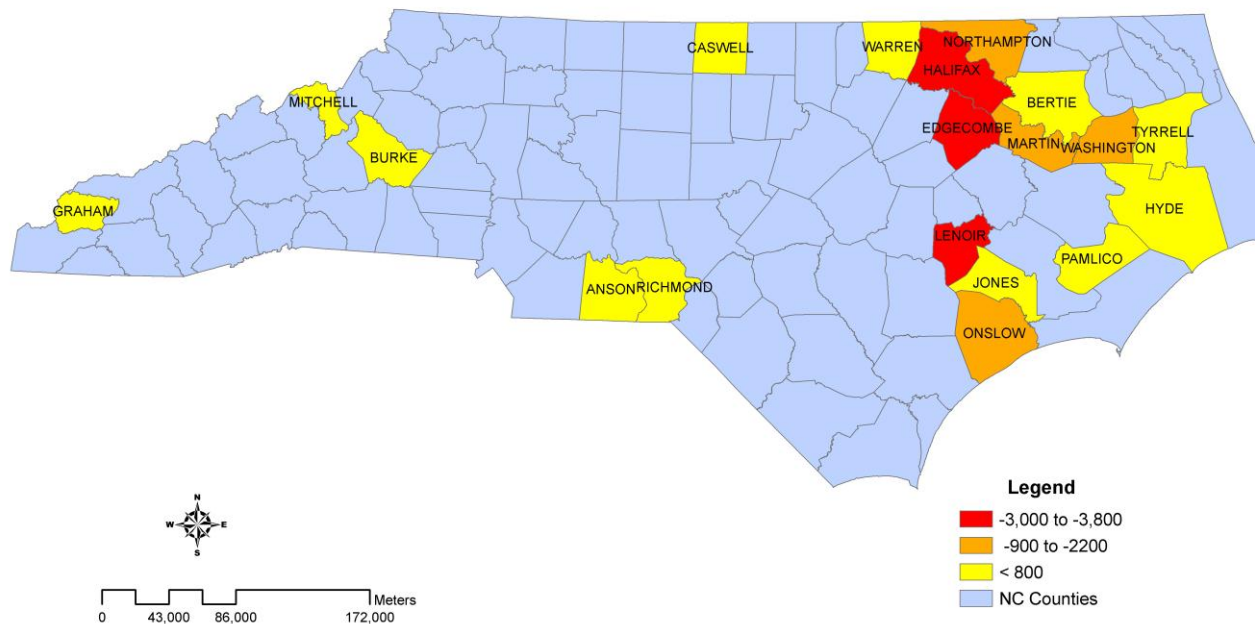
STATE SHARE OF SOUTH'S NET GROWTH, 2000-2010

Region/State	Absolute Change	State's Share
The South	14,318,924	100.0%
Texas	4,293,741	30.0%
Florida	2,818,932	19.7%
Georgia	1,501,200	10.5%
North Carolina	1,486,170	10.4%
Other Southern States	4,218,881	29.4%

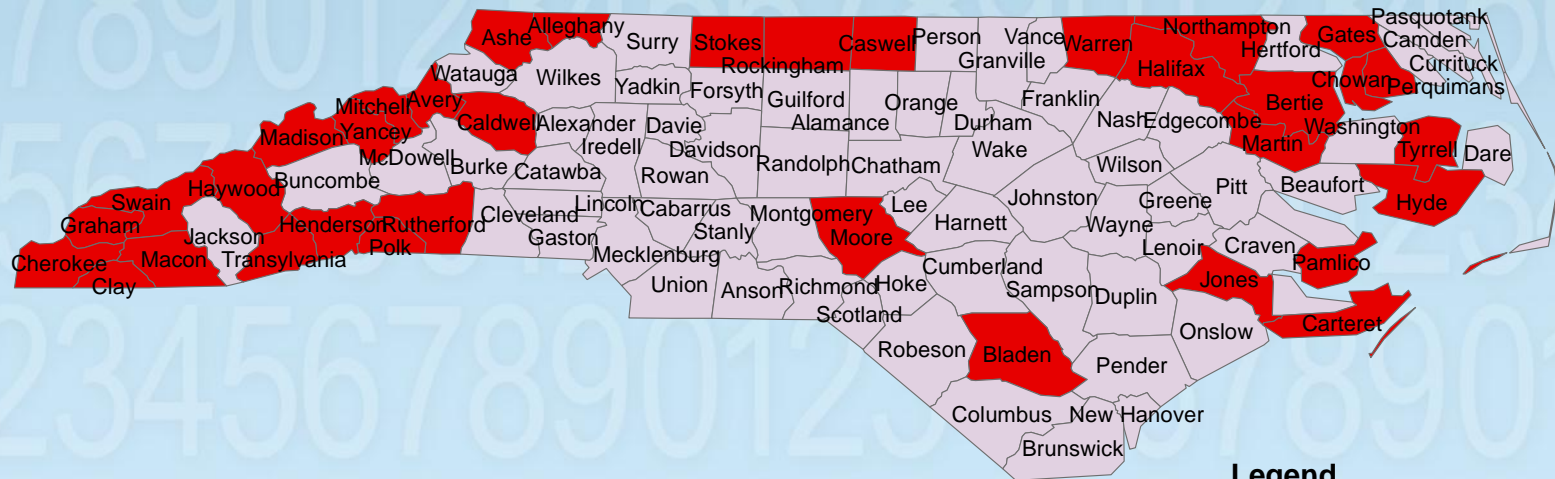
NC COUNTIES WITH THE LARGEST ABSOLUTE POPULATION GAINS, 2000-2010



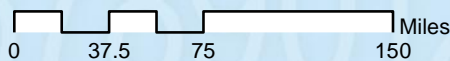
NC COUNTIES EXPERIENCING POPULATION DECLINE, 2000-2010



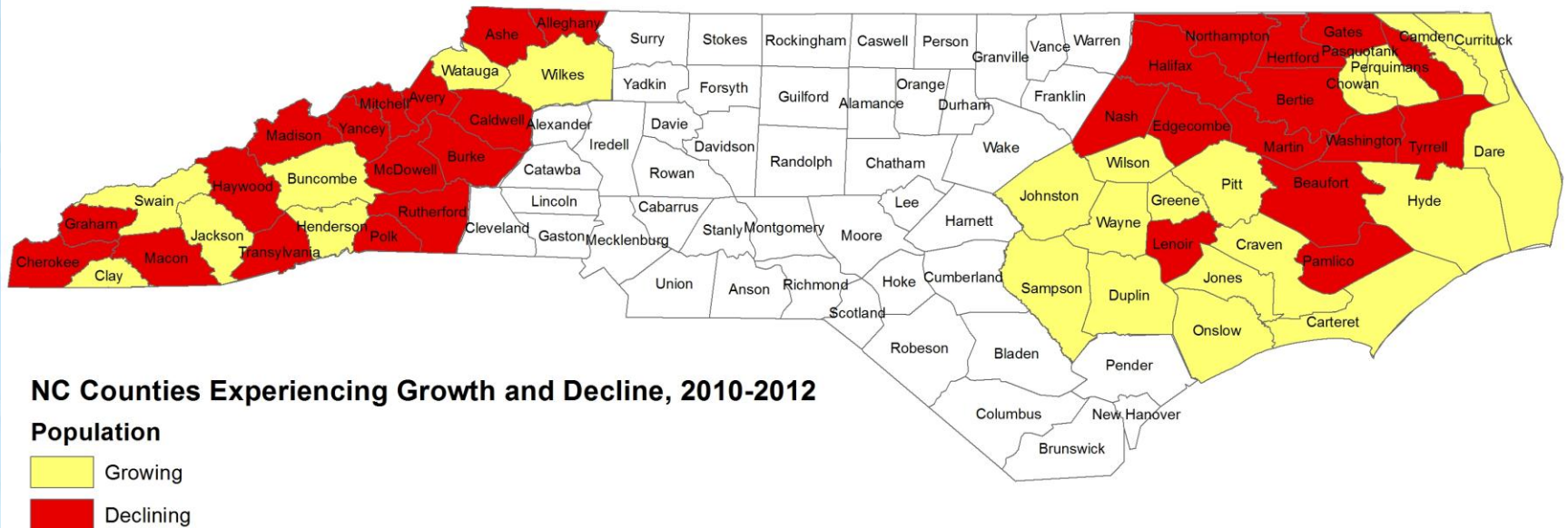
Counties with Biologically Declining Populations, 2009



4



North Carolina Counties Experiencing Growth & Decline, 2010-2012



Balance of Population Change Equation

- **Population Change = In-Flows – Out-Flows**

where

In-flows = [Births + In-Migrants]

&

Out-Flows =[Deaths + Out-Migrants]

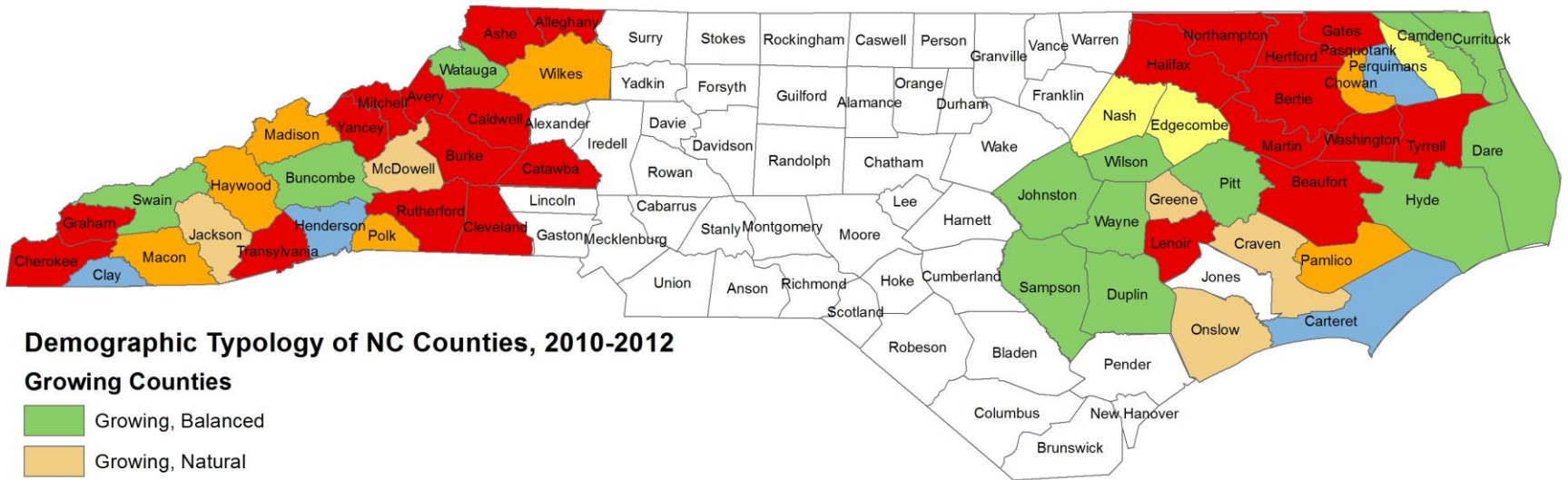
Typology of Communities

Demographic Experience	Drivers
Balanced Growth	Births exceed deaths and in-migration exceeds out-migration.
Natural Growth	Out-migration exceeds in-migration but this population loss is offset by an excess of births over deaths.
Migration Magnets	Deaths exceed births but population loss is averted because in-migration exceeds out-migration.
Dying	Deaths exceed births and out-migration exceeds in-migration, resulting in population loss.
Biologically Declining	In-migration exceeds out-migration but his net migration is not substantial enough to offset an excess of deaths over births
Emptying Out	Births exceed deaths but out-migration exceeds in-migration, resulting in net population loss

Types of Communities in Eastern and Western North Carolina

Type of Community	Number
Balanced Growth	13
Natural Growth	5
Migration Magnet	4
Emptying Out	3
Dying	23
Biologically Declining	7

Demographic Typology of NC Counties, 2010-2012



Demographic Typology of NC Counties, 2010-2012

Growing Counties

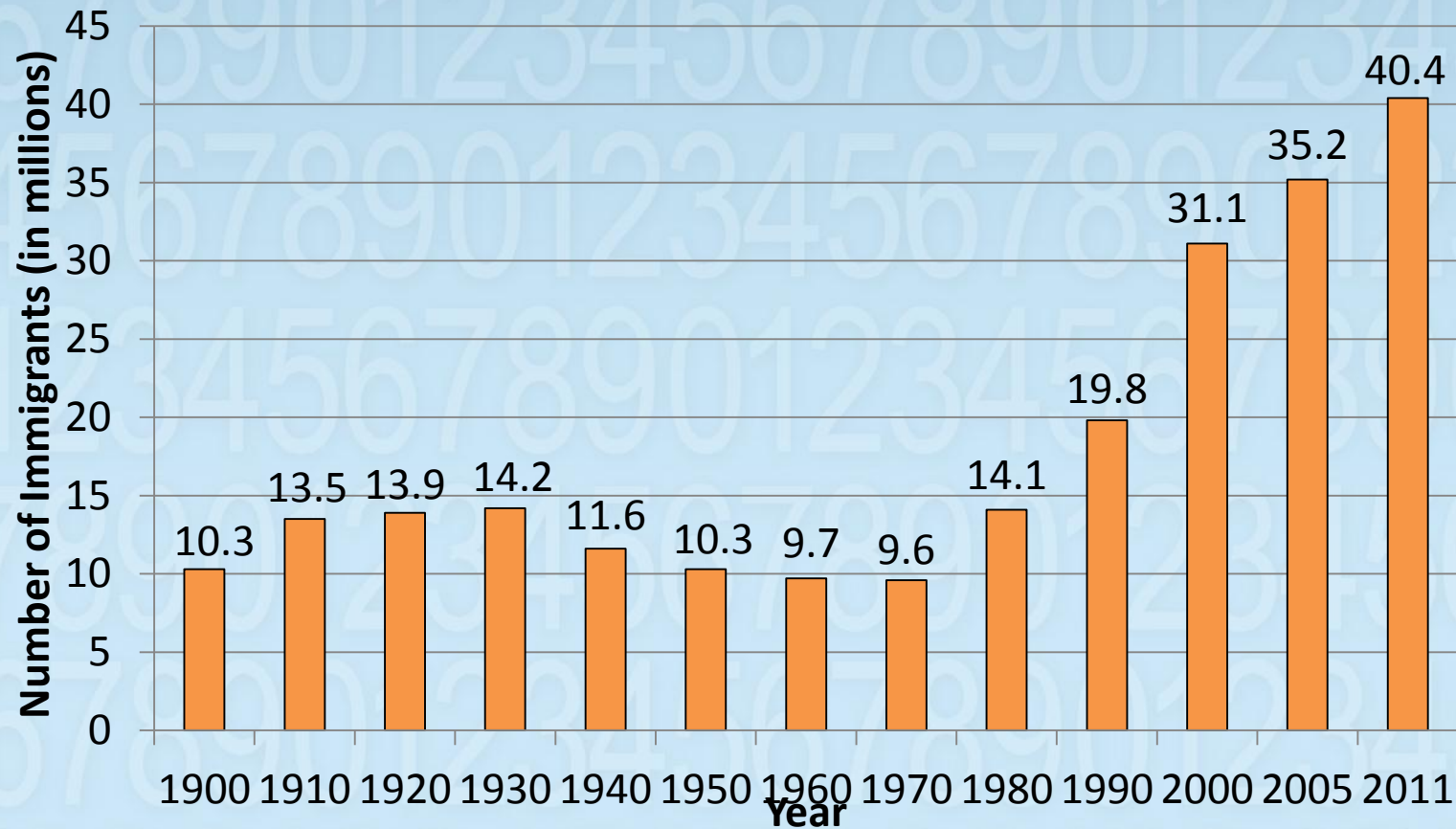
- Green: Growing, Balanced
- Orange: Growing, Natural
- Blue: Growing, Migration Magnets

Declining Counties

- Red: Declining, Dying
- Yellow: Declining, Emptying Out
- Orange: Declining, Biologically Declining

THE “BROWNING” OF NORTH CAROLINA

U.S. Immigrant Population, 1900-2011



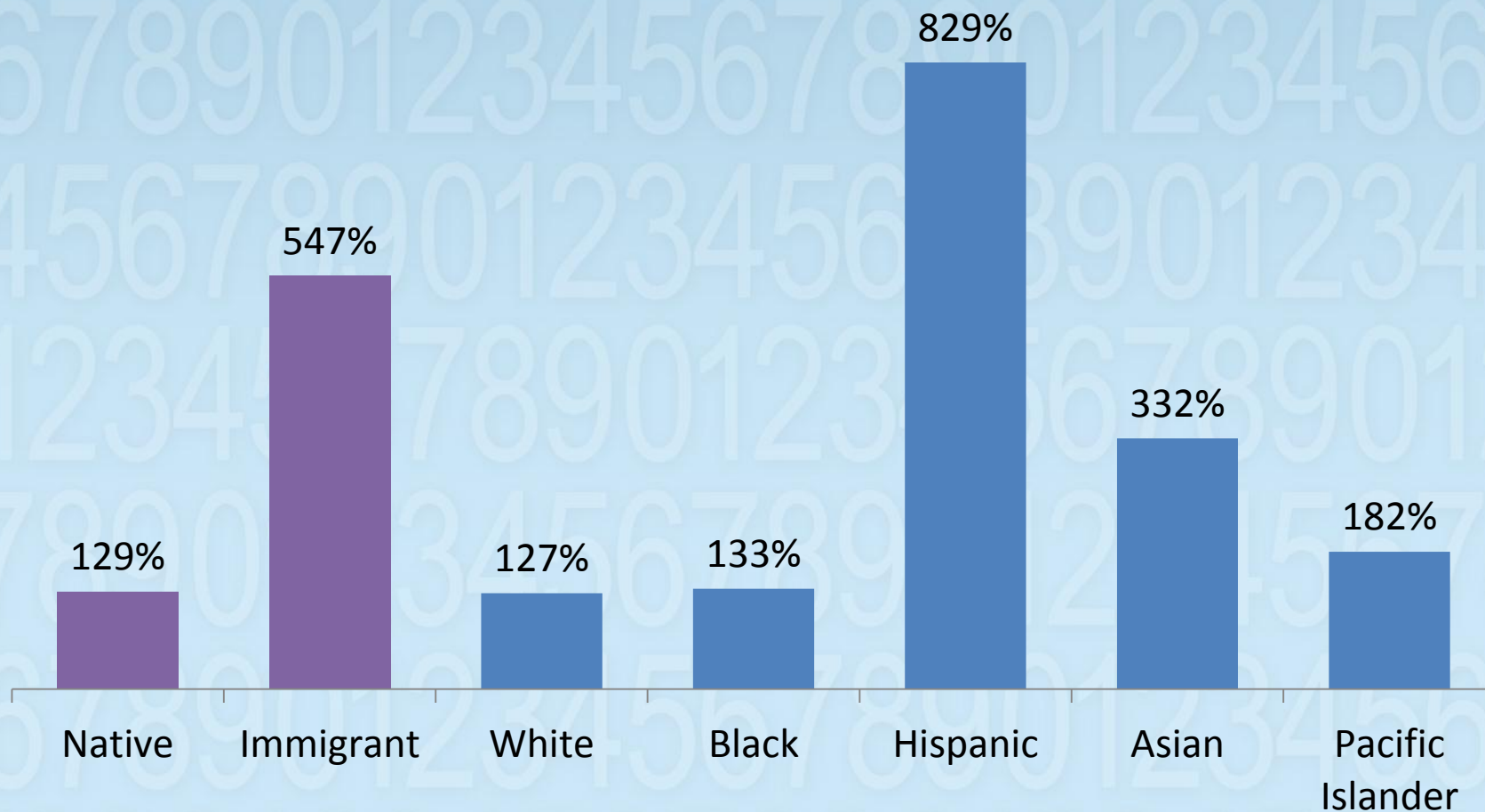
U.S. Foreign Born Population by Race/Ethnicity, 2011

Race/Ethnicity	Foreign Population	Share of Total (%)
Total	40,381,574	100.0
Hispanic	18,788,300	46.5
White Alone, not Hispanic	7,608,236	18.8
Black Alone, not Hispanic	3,130,348	7.8
Asian Alone, not Hispanic	9,988,159	24.7
Other Alone, not Hispanic	866,531	2.1

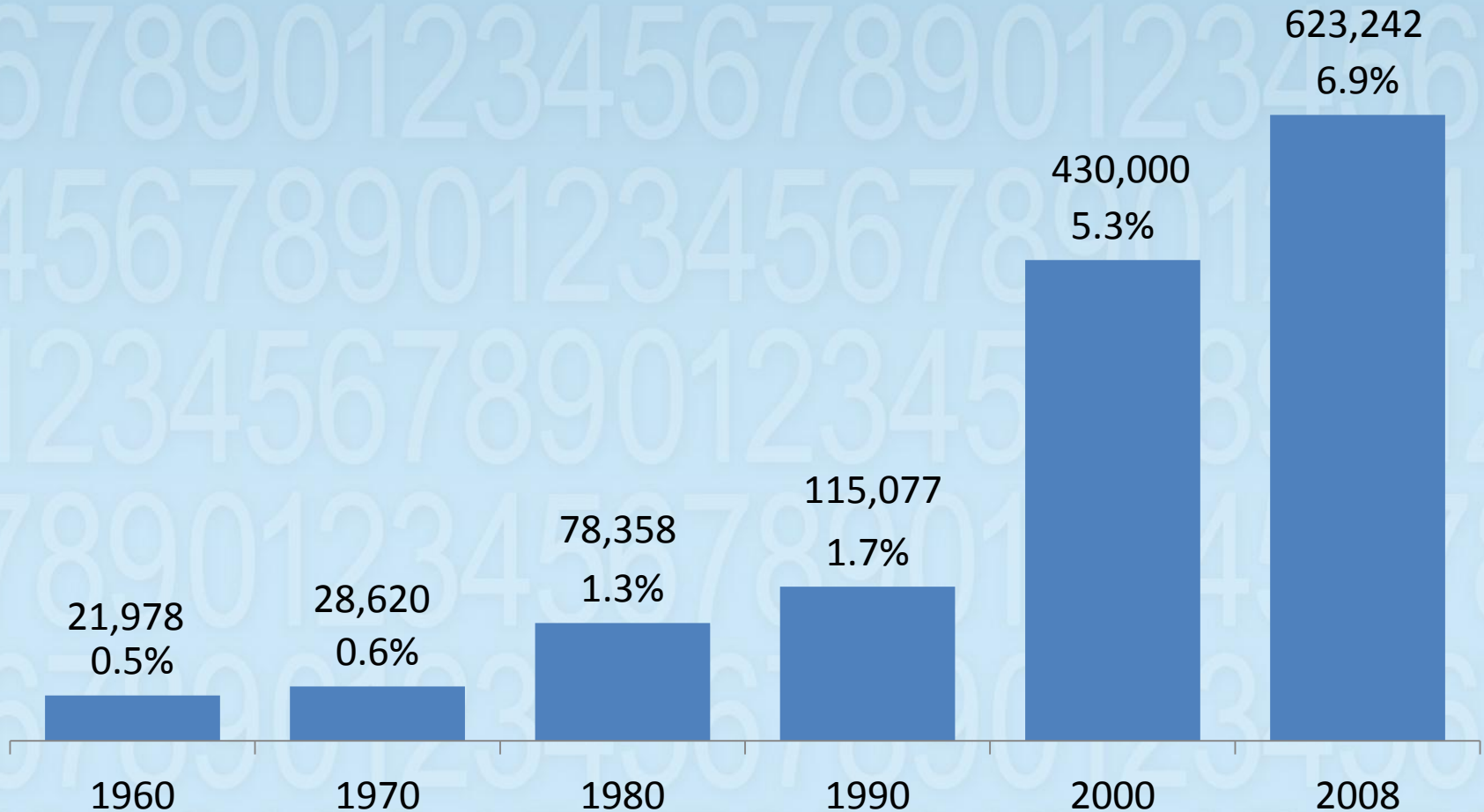
U.S. POPULATION CHANGE BY RACE & ETHNICITY, 2000-2010

Race	2010 Population	Absolute Change 2000 – 2010	Percentage Change 2000 - 2010
Total	308,745,538	27,323,632	9.7%
Non-Hispanic	258,267,944	12,151,856	4.9%
White	196,817,552	2,264,778	1.2%
Black	37,685,848	3,738,011	11.0%
AI/AN	2,247,098	178,215	8.6%
Asian	14,465,124	4,341,955	42.9%
NH/PI	481,576	128,067	36.2%
2 or More Races	5,966,481	1,364,335	29.6%
Hispanic	50,477,594	15,171,776	43.0%

NORTH CAROLINA POPULATION GROWTH BY NATIVITY, RACE, AND ETHNICITY, 1990-2007



NORTH CAROLINA FOREIGN BORN POPULATION GROWTH , 1990-2008



CONTRIBUTIONS OF NON-WHITES & HISPANICS TO NC POPULATION CHANGE, 2000-2010

Area	Absolute Population Change	Percent Non-White*	Percent Hispanic
All Counties	1,486,170	61.2	28.5
Tier 1 Counties	69,365	84.1	51.5
Tier 2 Counties	327,859	63.2	34.2
Tier 3 Counties	1,088,946	59.1	25.0

Source: Census 2000 and Census 2010. *Non-whites include Blacks, Hispanics, American Indians and Alaskan Natives, Asians, Native Hawaiians & Pacific Islanders, and people of two or more races.

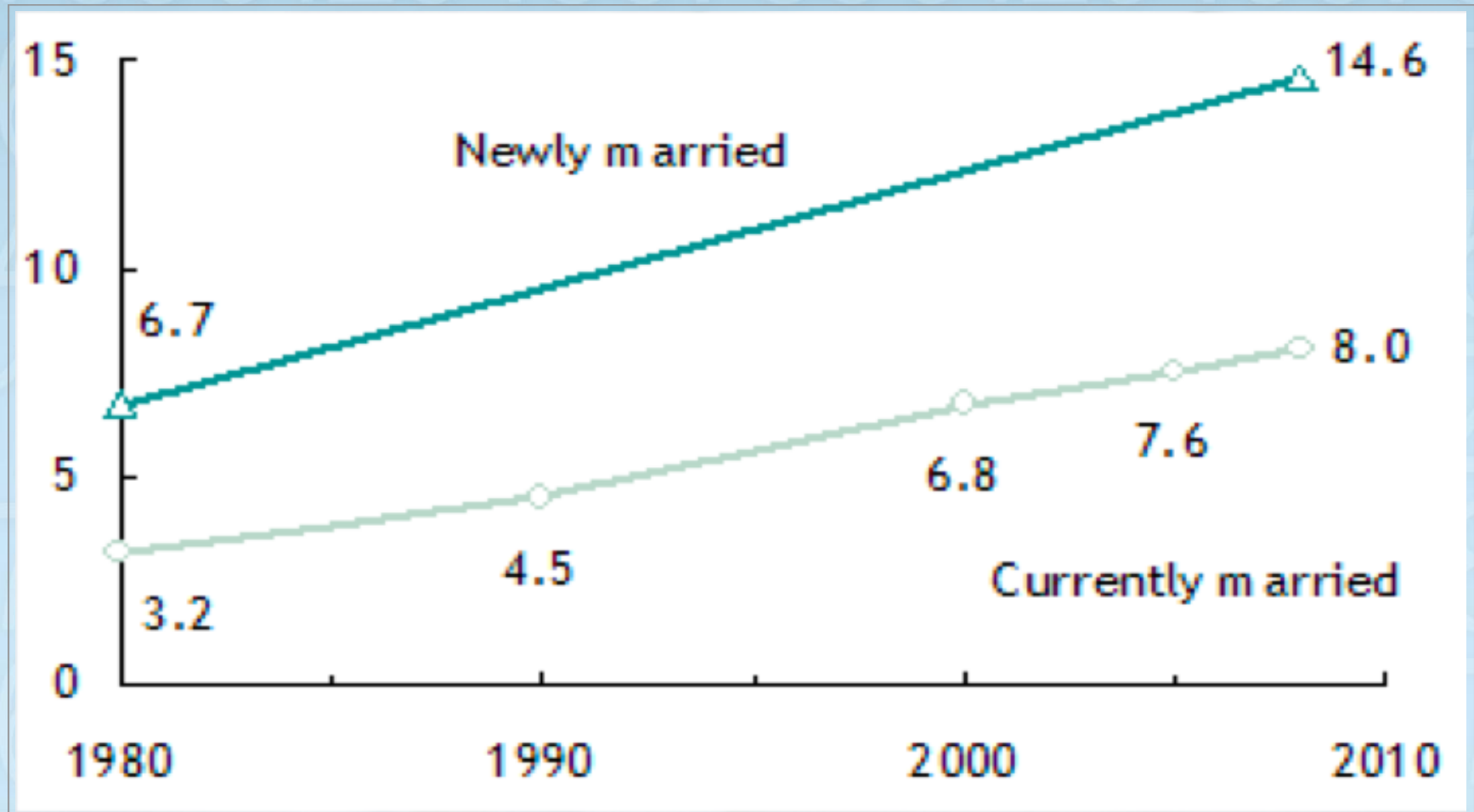
Marrying Out



is “In”

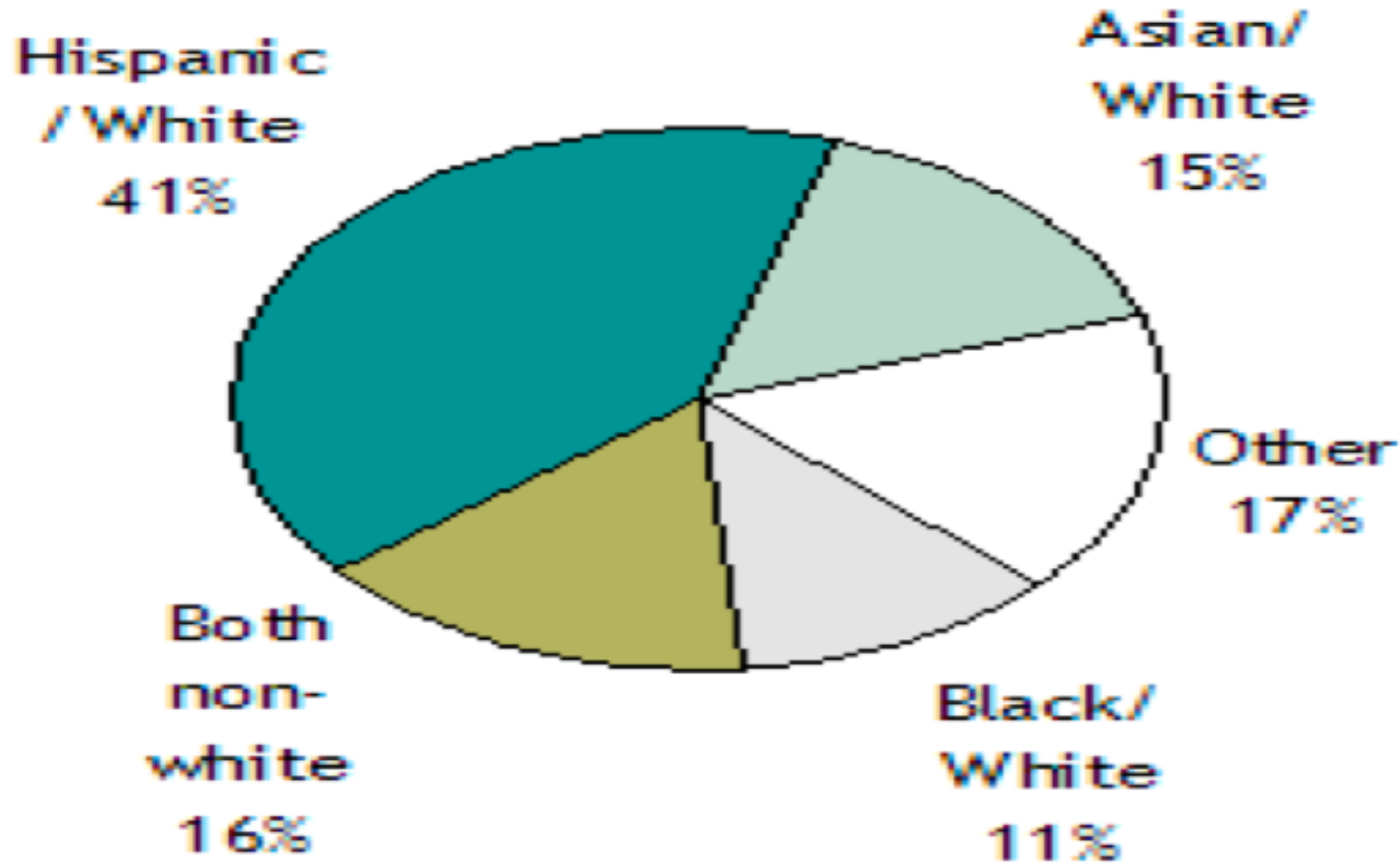
INTERMARRIAGE TREND, 1980-2008

% Married Someone of a Different Race/Ethnicity



INTERMARRIAGE TYPES

Newly Married Couples in 2008



OUT-MARRIAGE PATTERNS BY RACE AND GENDER, NC 2005-2009

Hispanic Men	21.4	Hispanic Women	21.6
White Female	18.0	White Male	16.4
Black Female	1.5	Black Male	3.7
Asian Female	0.7	Asian Male	0.2
Other Female	1.2	Other Male	1.3

Black Men	9.4	Black Women	3.4
White Female	6.0	White Male	0.6
Hispanic Female	1.4	Hispanic Male	1.9
Asian Female	0.5	Asian Male	0.1
Other Female	1.5	Other Male	0.9

White Men	3.3	White Women	3.4
Hispanic Female	1.1	Hispanic Male	1.2
Black Female	0.3	Black Male	1.1
Asian Female	0.9	Asian Male	0.2
Other Female	1.0	Other Male	0.9

Asian Men	12.3	Asian Women	31.4
White Female	10.0	Hispanic Male	1.5
Black Female	0.6	White Male	25.8
Hispanic Female	0.5	Black Male	2.7
Other Female	1.2	Other Male	1.3

MEDIAN AGE & FERTILITY RATES FOR FEMALES IN NC, 2005-2009

Demographic Group	Median Age	Fertility/1000 women*
All Females	38.1	56
White, Not Hispanic	41.6	49
Black	35.0	58
American Indian & Alaskan Native	34.1	74
Asian	32.8	67
Native Hawaiian & Pacific Islander	25.5	33
Some other race	22.1	108
Two or more races	17.8	78
Hispanic	22.3	101
Native Born	38.7	52
Foreign Born	35.3	92

Source: American Community Survey

*Women 15 to 50 with births in past 12 months

RELATIVE DISTRIBUTION OF U.S. BIRTHS BY RACE / ETHNICITY

Race/Ethnicity	1990	2008	2011
White	66%	50%	49.6%
Blacks	17%	16%	15.0%
Hispanics	15%	26%	26.0%
Other	2%	8%	9.4%

Source: Johnson and Lichter (2010); Tavernise (2011).

CHANGE IN THE RACE/ETHNIC COMPOSITION OF NC PUBLIC SCHOOLS, 2000-2009

Group	2009 Enrollment	2000 Enrollment	Absolute Change	Percent Change	Share of Net Change
Total	1,427,960	1,268,422	159,538	12.6	100.0%
AI/AN	20,378	18,651	1,727	9.6	1.2%
Black	444,870	393,712	51,158	13.0	32.1%
Asian	35,140	23,576	11,564	49.0	7.2%
Hispanic	152,605	56,232	96,373	171.4	60.4%
White	774,967	776,251	- 1,284	- 0.2	

Source: DPI, The Statistical Profile Online

NC's SILVER TSUNAMI



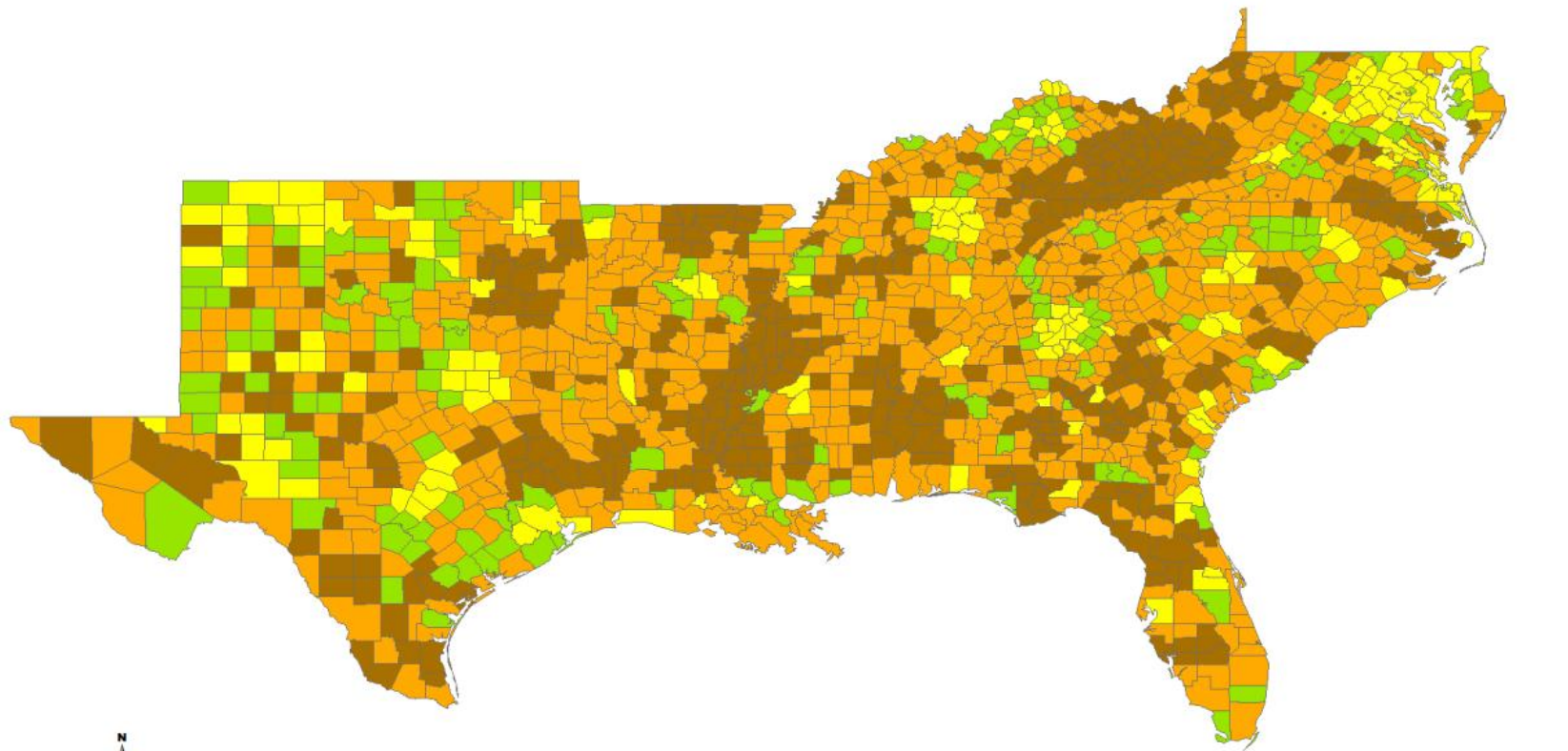
U.S. POPULATION CHANGE BY AGE, 2000-2009

Age	2009	Absolute Change 2000 - 2009	Percentage Change 2000 - 2009
<25	104,960,250	5,258,492	5.3
25-44	84,096,278	-1,898,345	-2.2
45-64	79,379,439	16,977,567	27.2
65+	39,570,590	4,496,886	12.8
TOTAL	307,006,550	24,834,593	8.8

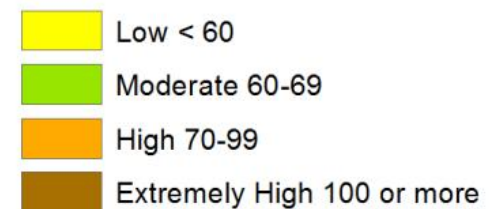
U.S. POPULATION TURNING 50, 55, 62, AND 65 YEARS OF AGE, (2007-2015)

	Age 50	Age 55	Age 62	Age 65
Average Number/Day	12,344	11,541	9,221	8,032
Average Number/Minute	8.6	8.0	6.4	5.6

DEPENDENCY RATIOS IN THE AMERICAN SOUTH



Legend



Source: Census 2010

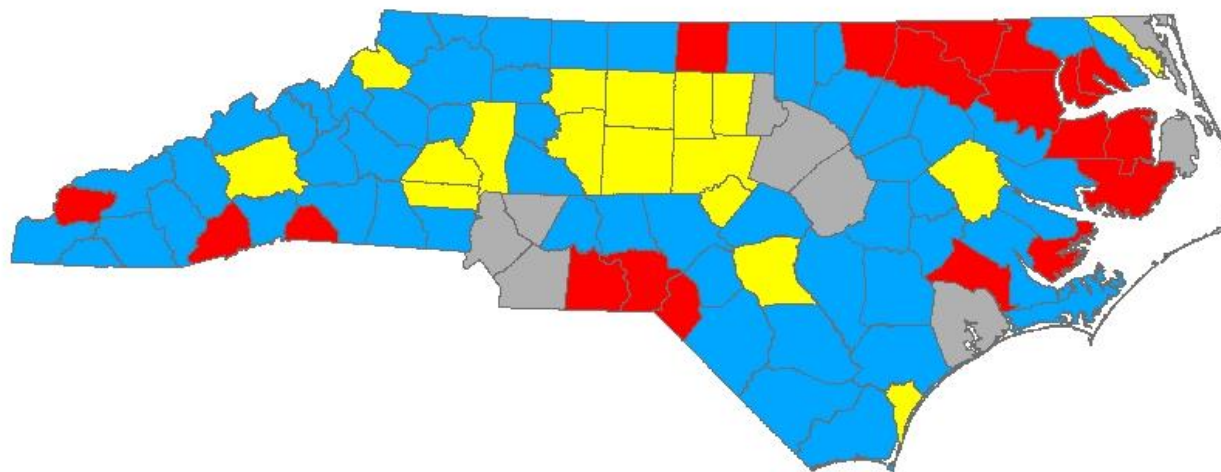
NC ABSOLUTE POPULATION CHANGE BY AGE, 2000-2010

Age	All Counties	Tier 3 Counties	Tier 2 Counties	Tier 1 Counties
All Ages	1,486,170	1,088,946	327,859	69,365
<25	449,385	369,818	85,481	- 5,914
25-44	73,209	159,248	- 36,139	-49,900
45-64	698,545	410,705	199,101	88,739
65+	265,031	149,175	79,416	36,440

DEPENDENCY RATES FOR SELECTED SOUTHERN STATES, 2006-2010

	Dependency Rate
Georgia	67.4
Counties with Population Decline (31)	100.4
Counties Growing 0.1-10% (44)	75.2
Counties Growing 10% or more (84)	62.6
	Dependency Rate
North Carolina	68.7
Tier 1	90.5
Tier 2	71.3
Tier 3	56.6
	Dependency Rate
Alabama	80.9
5 Counties with Greatest % Loss	152.5
5 Counties with Greatest % Gain	67.1

North Carolina Dependency Ratios, 2010



0 46,500 93,000 186,000 Meters

Source: Census 2010, STF1

Dependents per 100 workers

- Low < 60
- Moderate 60-69
- High 70-99
- Extremely High 100 or more

COOLING WATERS FROM GRANDMA'S WELL

And Grandpa's Too!

Children Living in Non-Grandparent and Grandparent Households, 2001-2010

Household Type	Absolute Number 2010	Absolute Change 2001-2010	Percent Change 2001-2010
All	74,718	2,712	3.8
No Grandparents	67,209	917	1.4
Both Grandparents	2,610	771	41.9
Grandmother Only	1,922	164	9.3
Grandfather Only	318	71	28.7

Children Living in Non-Grandparent and Grandparent-Headed Households by Presence of Parents, 2010

Household Type	All Children (in thousands)	Living with Both Parents	Living with Mother Only	Living with Father Only	Living with Neither parent
All	74,718	69.3%	23.1%	3.4%	4.0%
No Grandparents	67,209	73.4%	21.2%	3.3%	2.1%
Both Grandparents	2,610	18.1%	40.6%	5.2%	36.1%
Grandmother Only	1,922	13.8%	48.4%	4.5%	33.2%
Grandfather Only	318	26.4%	45.9%	4.4%	23.6%

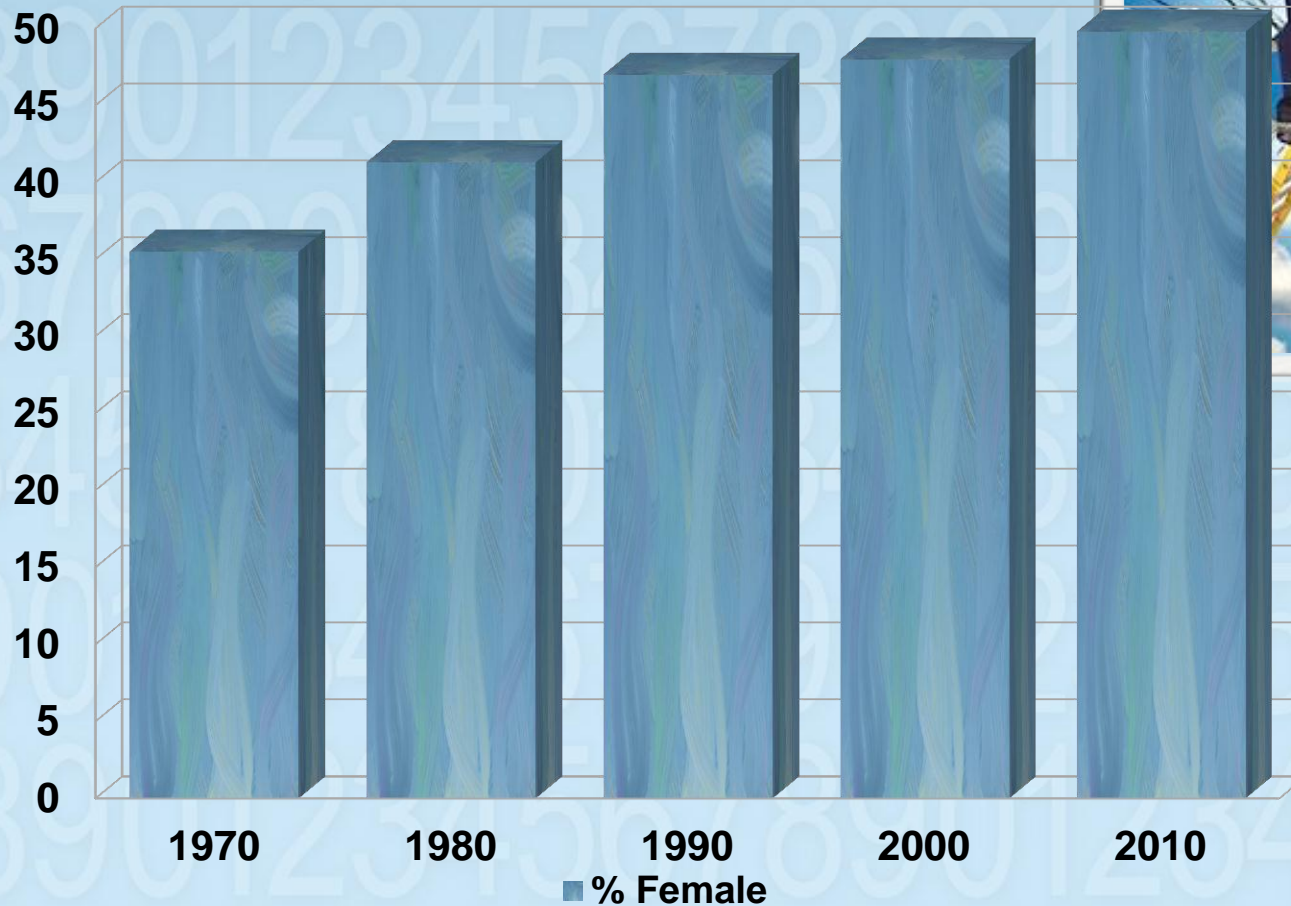
GRANDPARENTS LIVING WITH GRANDCHILDREN AGES 18 AND YOUNGER IN NORTH CAROLINA

	2005	2010	Percent Change
Total Households with Grandparents	146,875	175,019	19.2
Grandparents Responsible for Grandchildren	84,232	109,602	30.1
Child's Parents in Household	43,679	67,271	54.0

The End of Men?



FEMALE WORKFORCE REPRESENTATION



JOBS LOST/GAINED BY GENDER DURING 2007 (Q4) – 2009 (Q3) RECESSION

Industry	Women	Men
Construction	-106,000	-1,300,000
Manufacturing	-106,000	-1,900,000
Healthcare	+451,800	+118,100
Government	+176,000	+12,000
Total	-1,700,000	-4,700,000

THE PLIGHT OF MEN

- Today, three times as many men of working age do not work at all compared to 1969.
- Selective male withdrawal from labor market—rising non-employment due largely to skills mismatches, disabilities & incarceration.
- The percentage of prime-aged men receiving disability insurance doubled between 1970 (2.4%) and 2009 (4.8%).
- Since 1969 median wage of the American male has declined by almost \$13,000 after accounting for inflation.
- After peaking in 1977, male college completion rates have barely changed over the past 35 years.

COLLEGE CLASS OF 2010

DEGREE	MALE	FEMALE	DIFFERENCE
Associate's	293,000	486,000	193,000
Bachelor's	702,000	946,000	244,000
Master's	257,000	391,000	134,000
Professional	46,800	46,400	-400
Doctor's	31,500	32,900	1,400
TOTAL	1,330,300	1,902,300	572,000

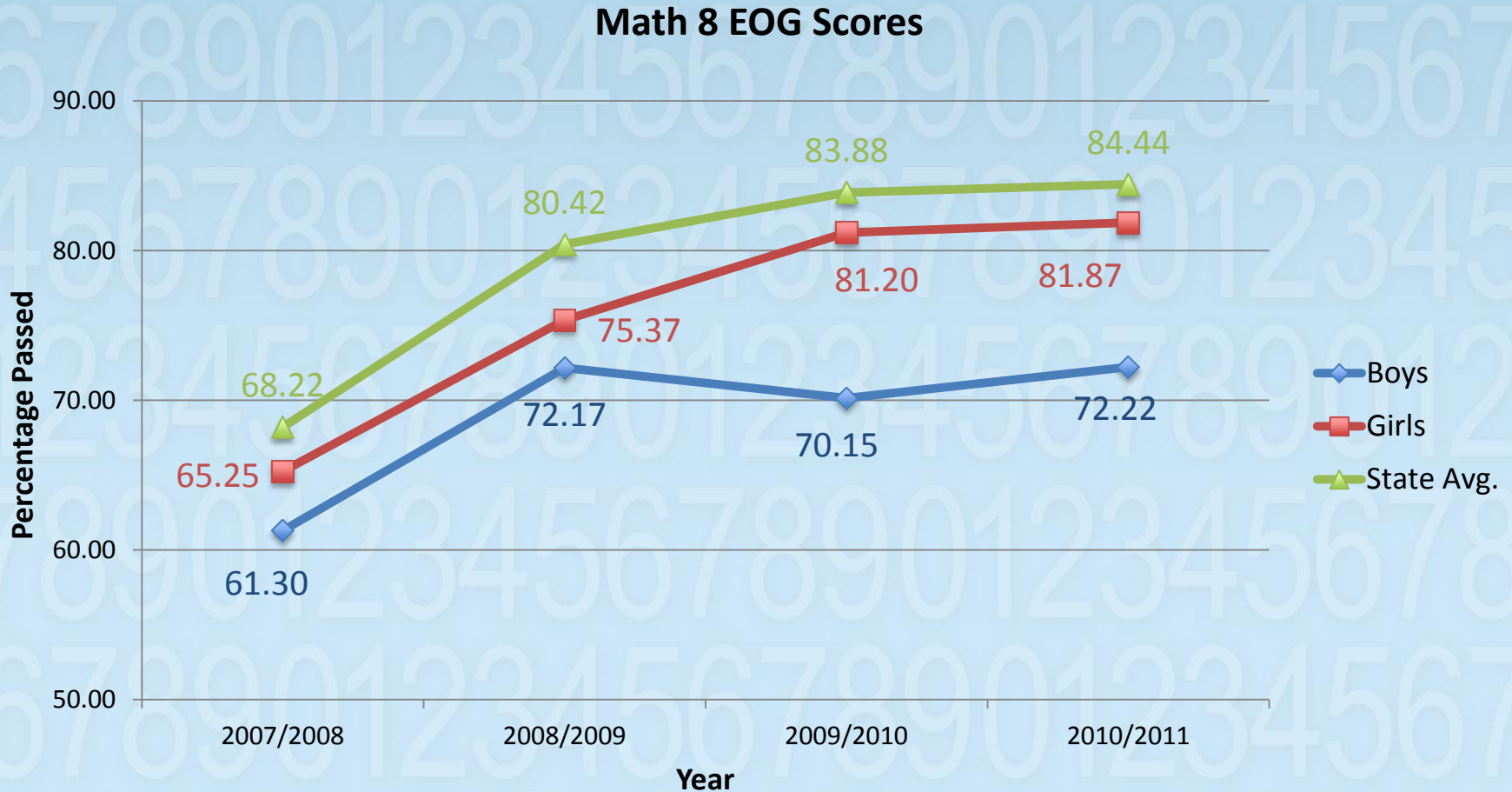
ENROLLMENT IN 2 YEAR COLLEGES, 2009

Area	Total Enrollment	Full Time Enrollment (%)	Male Enrollment (%)	Black Enrollment (%)
U.S.	20,966,826	63	43	13
Southeast Region	4,731,356	65	41	23
North Carolina	574,135	64	41	24
NC- 2 Yr Colleges	253,383	43	40	25

UNC SYSTEM STUDENT ENROLLMENT BY GENDER AND TYPE OF INSTITUTION, 2010

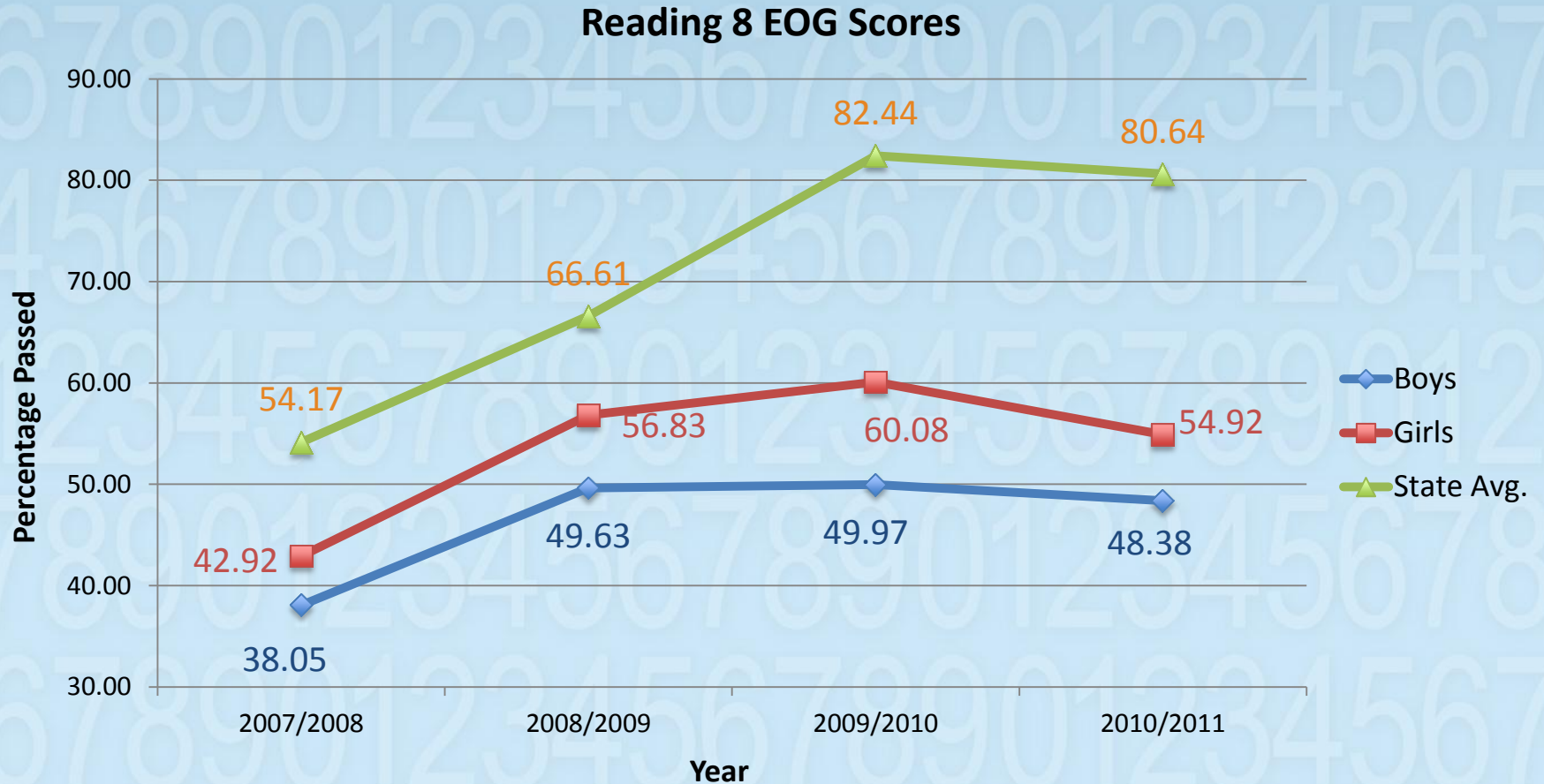
Type of Institution	Total Enrollment	Male Enrollment	Percent Male
UNC System	175,281	76,953	44
Majority Serving	139,250	63,403	46
Minority Serving	36,031	13,550	38
HBU's	29,865	11,191	37

Average EOG Scores



Gender scores are averages of 6 LEAs (Bertie, Bladen, Halifax, Duplin, Northampton and Pamlico)

Average EOG Scores



Gender scores are averages of 6 LEAs (Bertie, Bladen, Halifax, Duplin, Northampton and Pamlico)

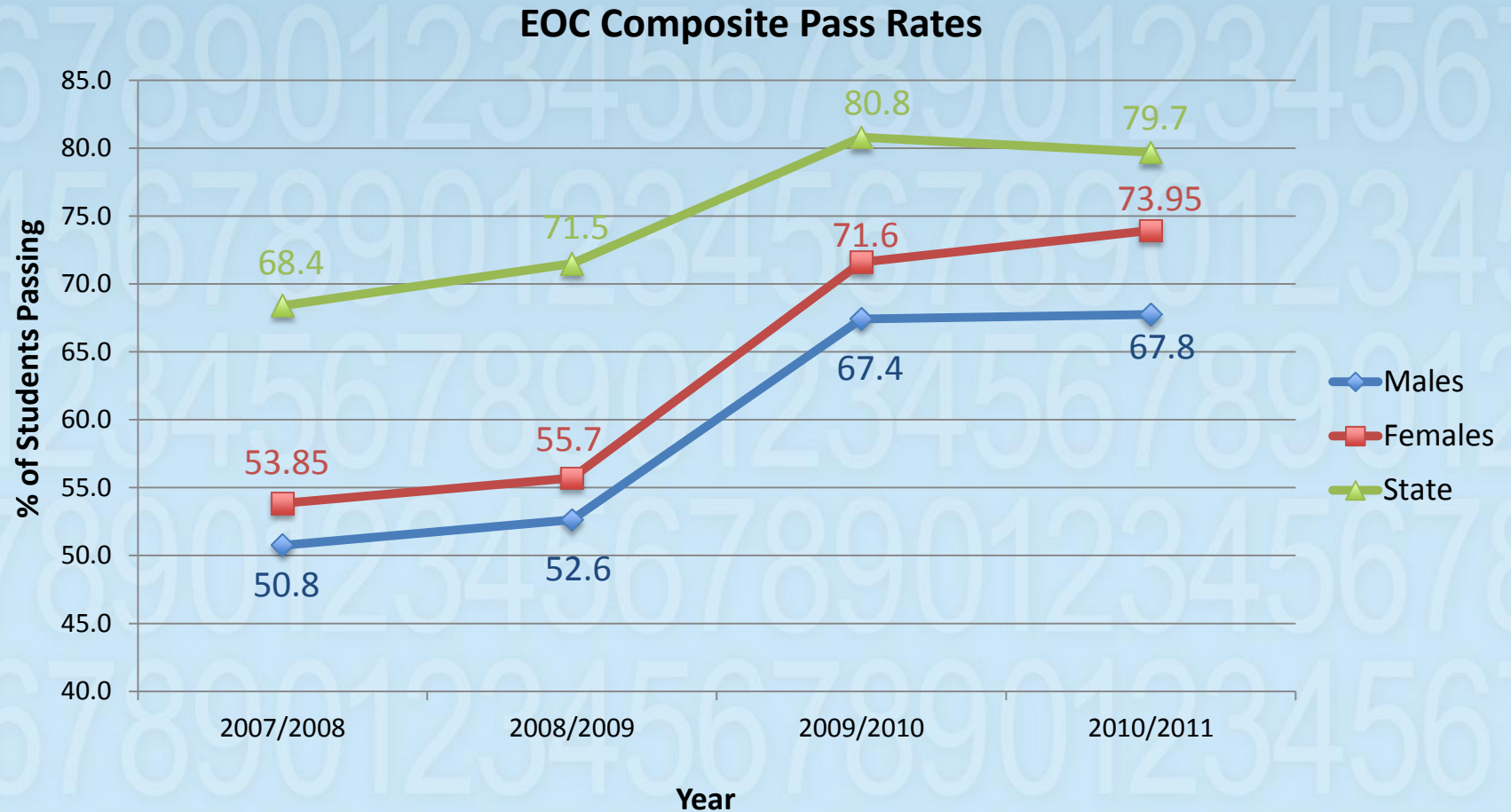
Average EOC Scores

Algebra 1 EOC Scores



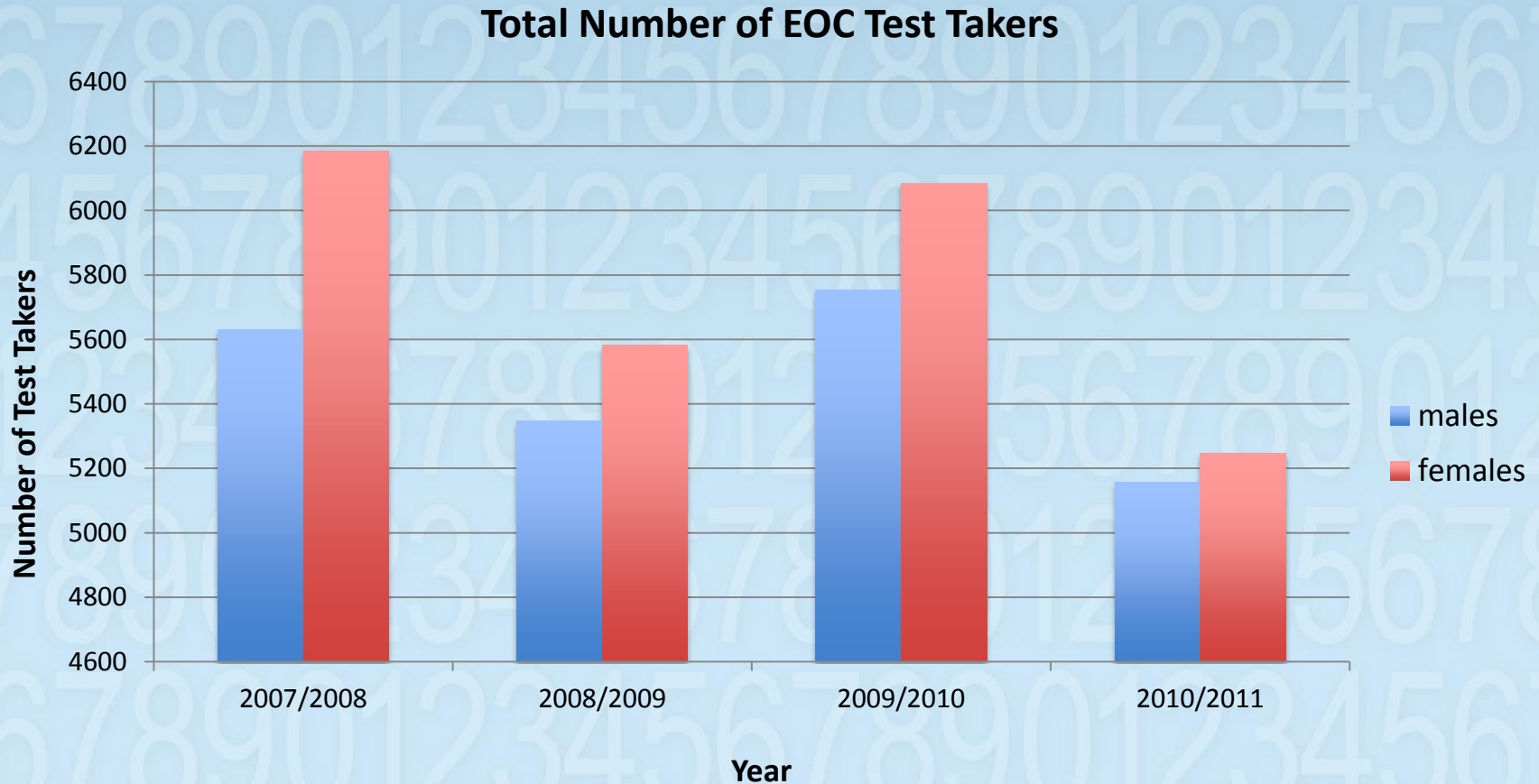
Gender scores are averages of 6 LEAs (Bertie, Bladen, Halifax, Duplin, Northampton and Pamlico)

EOC Composite Scores



Gender scores are averages of 6 LEAs (Bertie, Bladen, Halifax, Duplin, Northampton and Pamlico)

Male-Female Presence Disparity



Graph shows total number of male and female students tested of 6 LEAs (Bertie, Bladen, Duplin, Halifax, Northampton, and Pamlico)

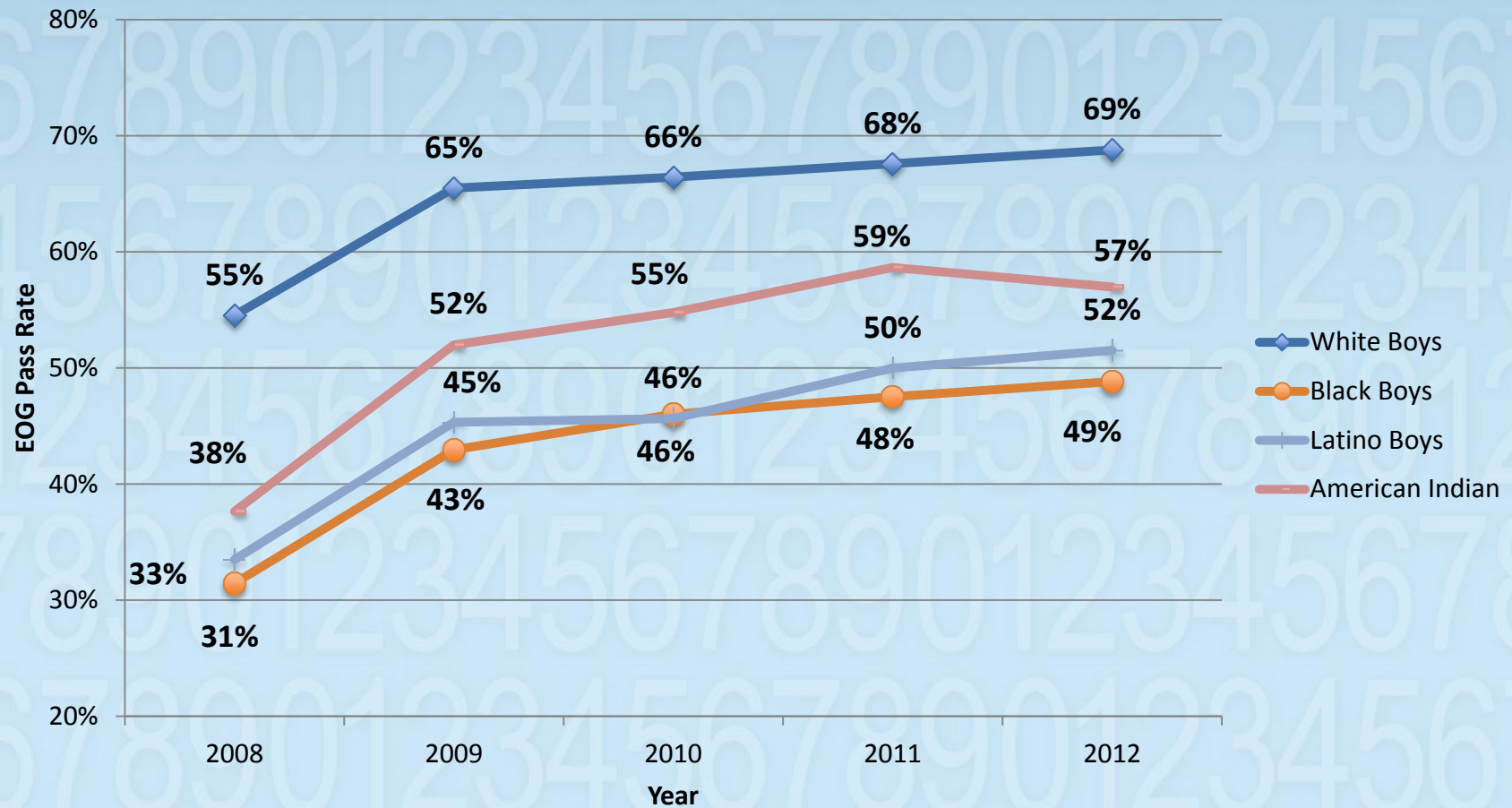
High School Graduation Rates



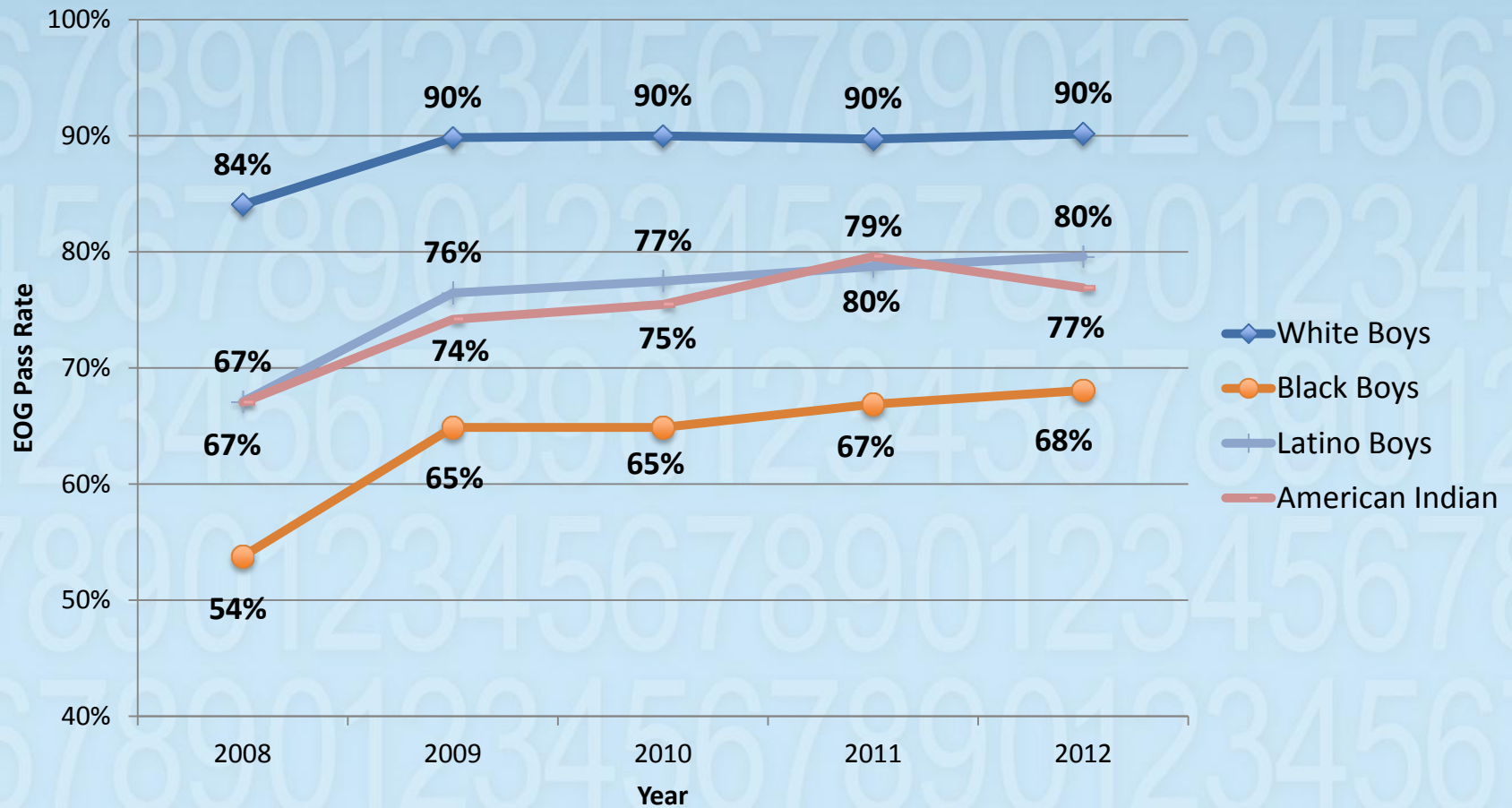
Avg. graduation rates of 6 LEAs (Bertie, Bladen, Halifax, Duplin, Northampton and Pamlico)

The Minority Male Challenge

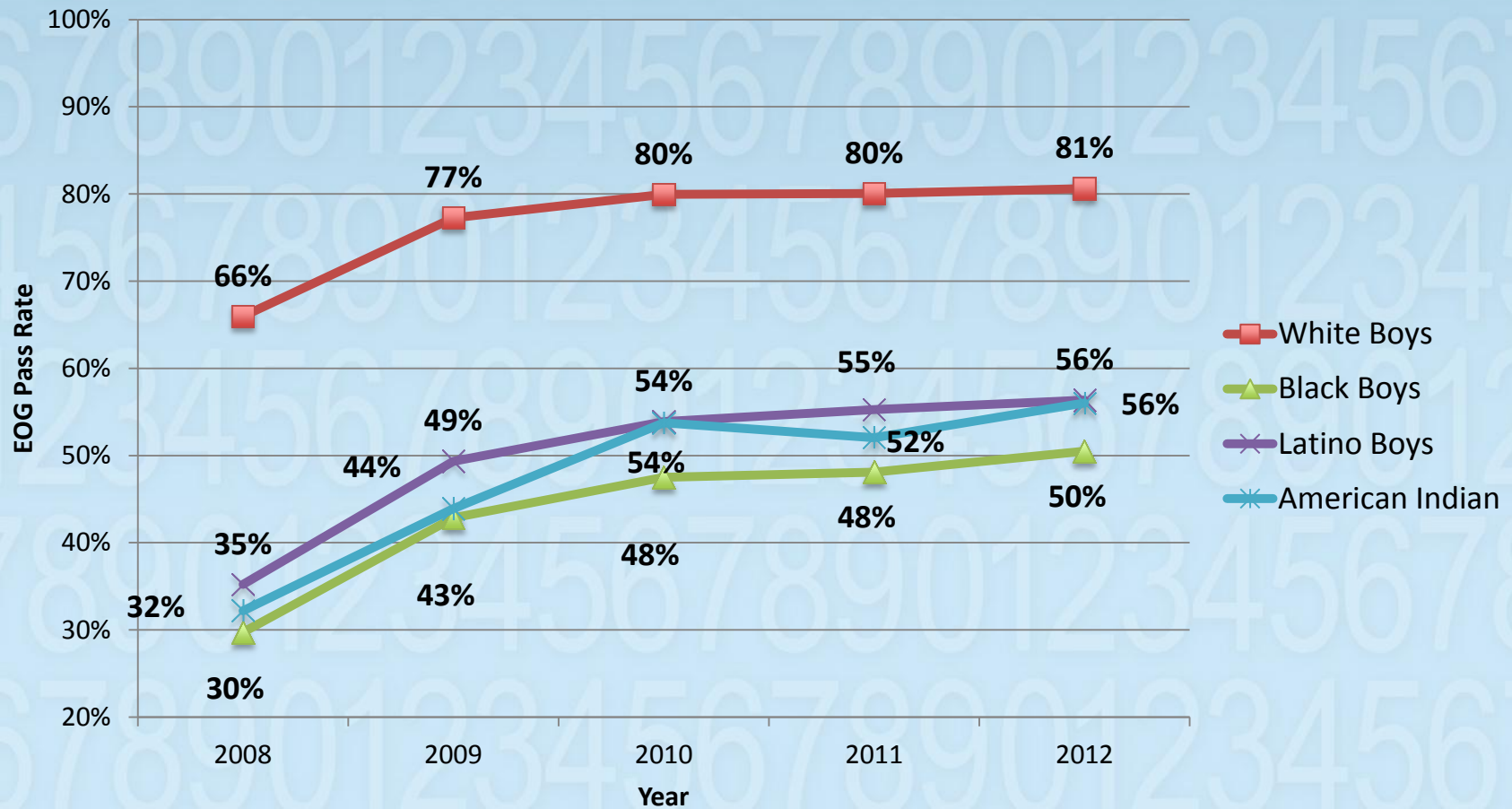
Third Grade EOG Reading Test Pass Rates For Males by Race/Ethnicity



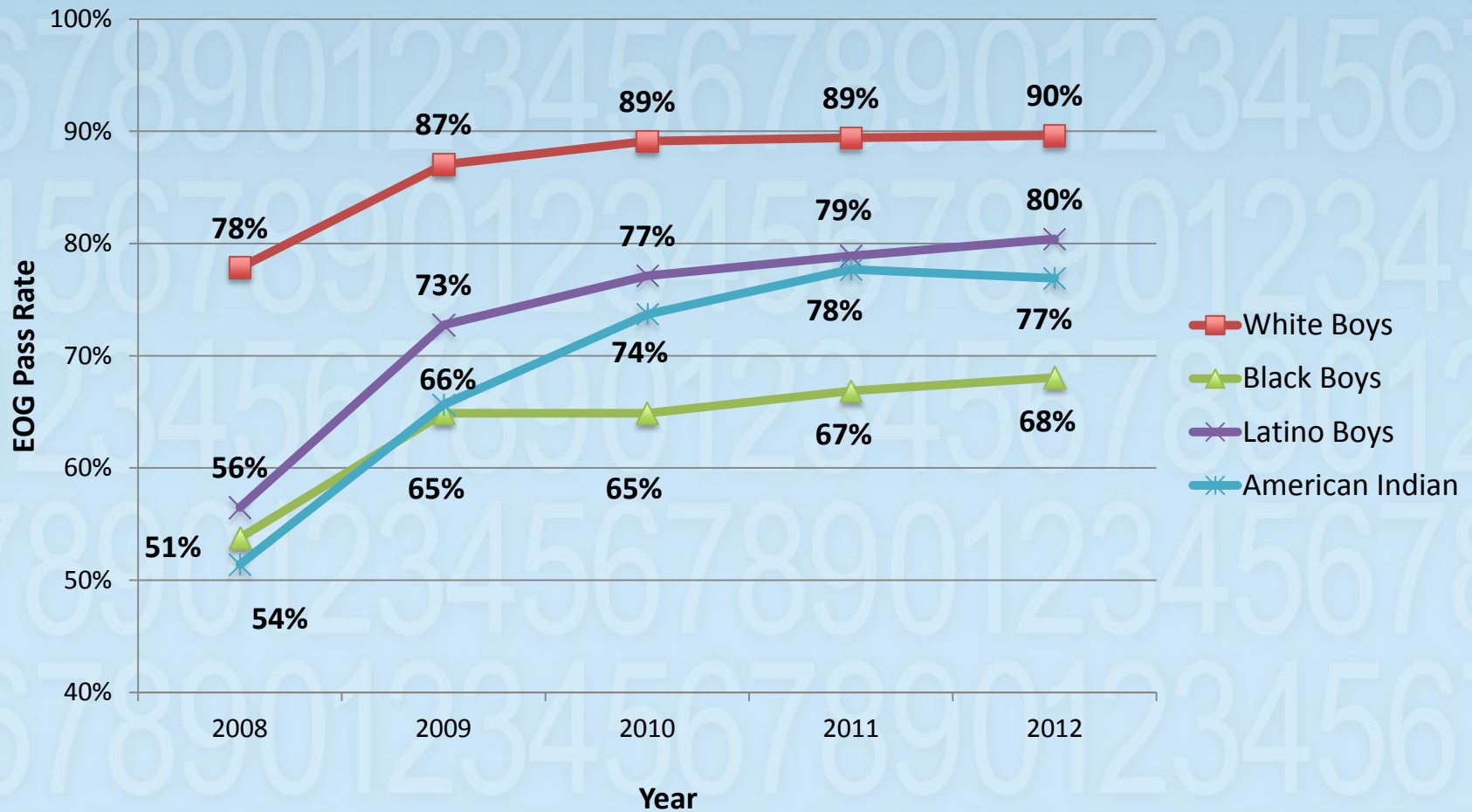
Third Grade EOG Math Test Pass Rates for Males by Race/Ethnicity



Eighth Grade EOG Reading Test Pass Rates for Males by Race/Ethnicity



Eighth Grade EOG Math Test Pass Rates for Males by Race/Ethnicity



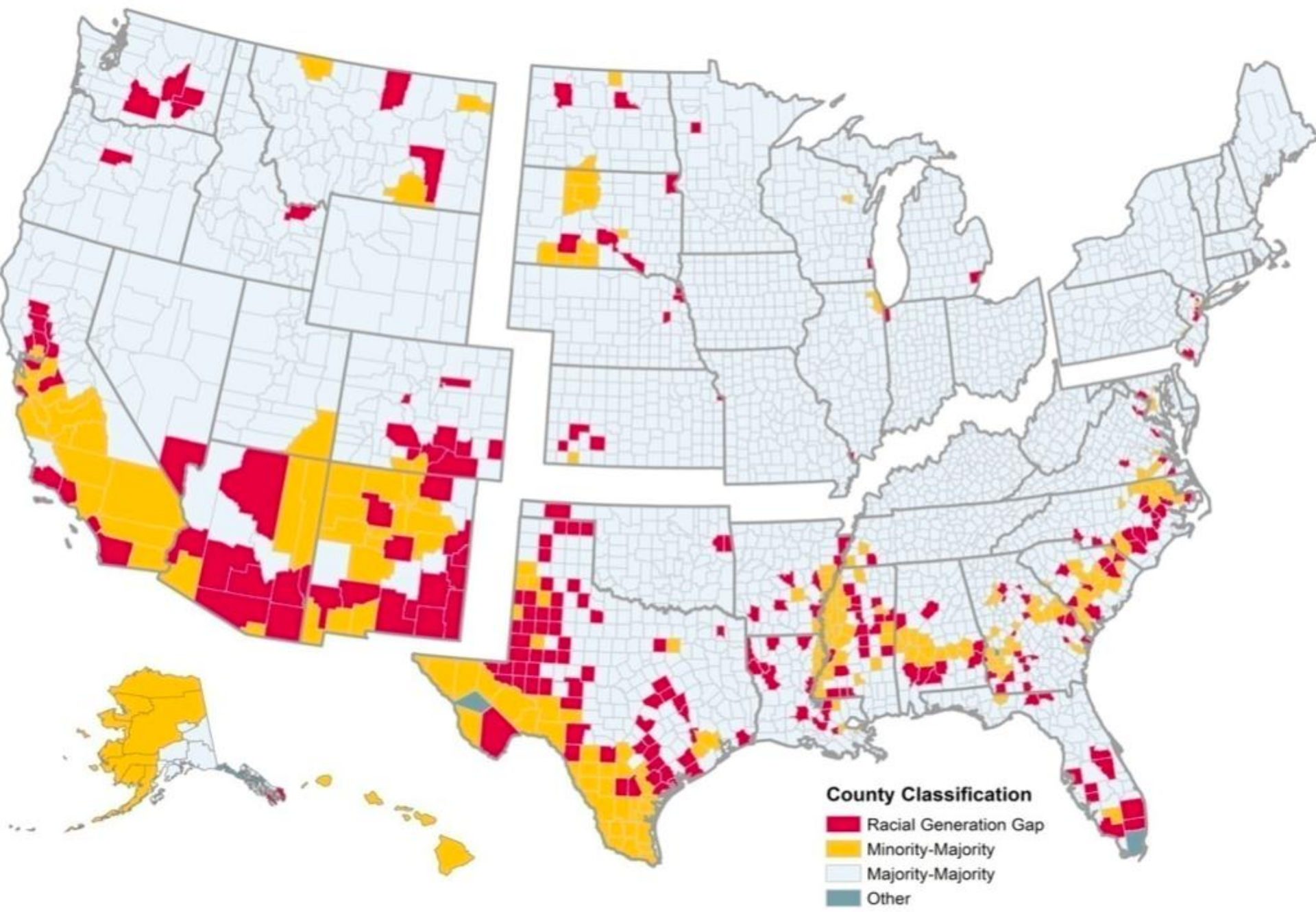


DIVERSITY RULES

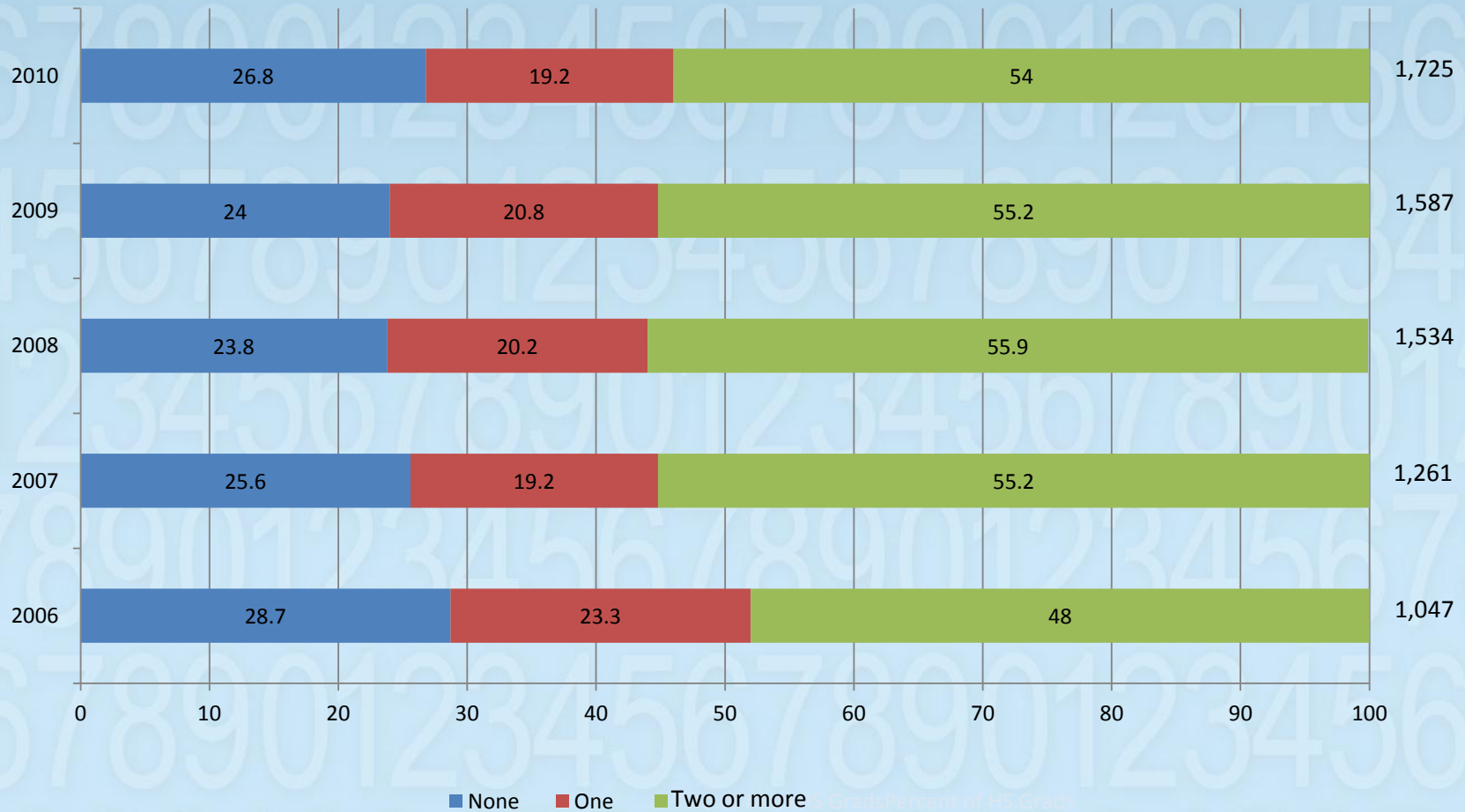
but Challenges Abound

September 2012

Racial/Ethnic Typology of U.S. Counties, 2005



Percent of High School Graduates Requiring Remedial Course Work



A group of four diverse students in a science laboratory. They are smiling and raising their hands. In the foreground, there are four Erlenmeyer flasks containing liquids of different colors: orange, green, blue, and yellow. The background is slightly blurred, showing a typical classroom or lab setting.

Education is Necessary

...but insufficient

AVERAGE SHARE OF LONG-TERM UNEMPLOYMENT BY EDUCATION

Education	1990-1993	2001-2004	% Change
Less Than High School	24.7%	23.7%	-1.0
High School Graduate	40.6%	34.3%	-6.3
Some College	20.7%	24.4%	3.7
Bachelor's Degree or More	14.0%	17.6%	3.6

AVERAGE SHARE OF LONG-TERM UNEMPLOYMENT BY OCCUPATION

Occupation	1990-1993	2001-2004	% Change
Blue Collar	40.5%	31.6%	-8.9
Service Occupation	14.3%	16.7%	2.4
White Collar	38.5%	44.4%	5.9

THE LONG-TERM UNEMPLOYED, 2009

PROFESSION

% OF ALL JOBLESS WORKERS

Architecture & Engineering	41.2
Management	39.0
Community & Social Services Occupations	36.1
Installation, Maintenance & Repair Work	34.9
Production Occupations	33.4

BACHELOR'S DEGREE HOLDERS (UNDER AGE 25) WHO WERE JOBLESS OR UNDEREMPLOYED

Year	Percent
2000	41.0
2011	53.6

CHANGE IN INCIDENCE OF POVERTY BY EDUCATIONAL ATTAINMENT IN NC, 2005-2007, 2008-2010

Educational Attainment	2005-2007	2008-2010	Percent Change
Less than High School	253,304	276,757	9.3%
High School Graduate	216,667	234,371	8.2%
Some College, Associate Degree	136,185	186,834	37.2%
Bachelor's degree or higher	49,082	57,919	18.0%

Source: American Community Survey

THE COMPETITIVE TOOL KIT

- Analytical Reasoning
- Entrepreneurial Acumen
- Contextual Intelligence
- Soft Skills/Cultural Elasticity
- Agility and Flexibility

Moving Forward

- Rebrand communities as a sustainable place to live and do business
- Improve Male Education Outcomes
- Augment efforts to recruit plants with strategies to recruit people
- Embrace immigrants
- Recognize business development & job creation potential of elder care economy, diverse ethnic markets, & nascent freelance economy.

Implications for Workforce Planning and Development

- Managing transition from the “graying” to the “browning” of America.
- Competition for talent will be fierce – and global.
- Successful recruitment and retention will hinge on your ability to effectively manage the full nexus of “diversity” issues.

Implications for Workforce Planning and Development

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IMPLICATIONS FOR BUSINESS

- Emergence of global care economy
- Adjustments for aging consumers
- Succession Planning
- Female-Dominated Labor Force and Leadership
- Free Agency Rules

The Elder Care Economy

Age-Related Challenges

- Mobility Limitations
- Hearing Loss
- Vision Impairments
- Mental Disorders
- Substance Abuse Issues
- Chronic Disabilities
- Economic Constraints

The Triple Whammy

- Aging Boomers Face Mortality
- Elder Care Responsibilities
- Raising Grandchildren

OPPORTUNITIES

- Cater products & Labeling to emerging Groups
- Design & package products with equality in mind

LABELING & PACKAGING

- Easy to Read
- Easy to Understand
- Easy to Carry
- Easy to Enjoy
- Safer to Use

DEFINITION OF EASY TO CARRY: CURRENT VS. FUTURE

Current Population

Future Grey Population

Bulky and Heavy

Minimal Unit Size and Weight

Big-sized cart, shopping cart, car trunk

Compact car, Rolling carriage

Price Sensitive

Weight Sensitive

Aesthetics Is More Important

Function Is More Important

Mostly carry with one hand

Handle with both hands

SMART SLIPPERS



GLOWCAPS



SENIOR PLAYGROUNDS



SENIOR PLAYGROUNDS



The Freelance Economy

DRIVERS

- Broadband Technology
- Cloud Computing
- Other Technological Innovations
- Disruptive Demographics
- Global Economic Recession

The Online Market Place

- Guru.com
- Elance.com
- Odesk.com
- Freelancer.com

The Freelancer Economy— Technology

- Websites & Ecommerce (42,084)
- Programming and Databases (47,749)
- Engineering & CAD (10,463)
- Networking & Telephone Systems (10,154)
- ERP & CRM (2,288)

The Freelancer Economy— Creative Arts

- Graphic Design & Multimedia (32,289)
- Writing, Editing, & Translation (45,510)
- Illustration & Art (11,451)
- Photography & Videography (7,399)
- Fashion & Interior Designs (2,746)
- Broadcasting (4,806)

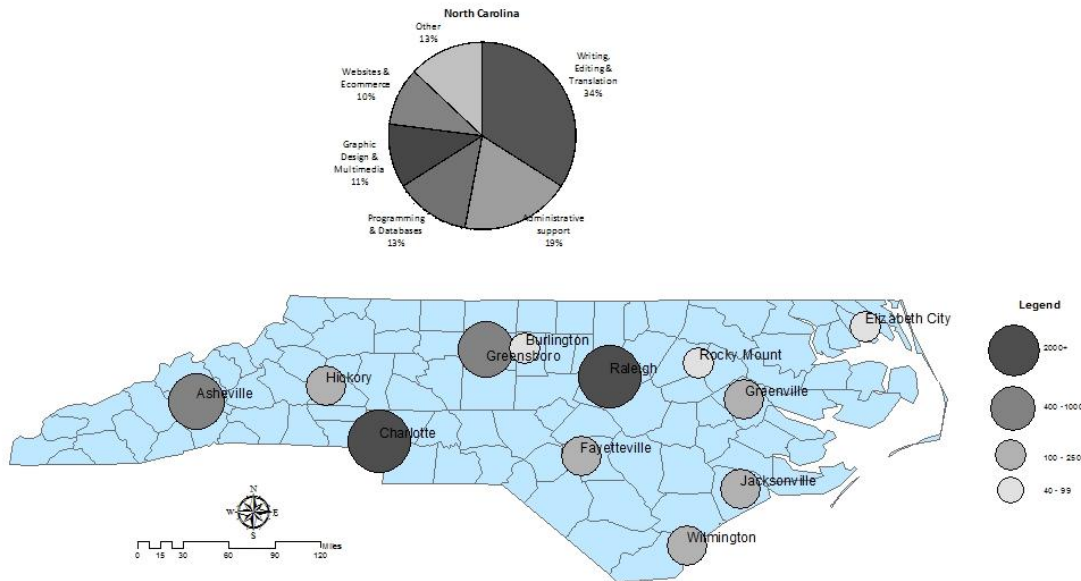
The Freelancers Economy— Business

- Administrative Support (36,504)
- Marketing & Communications (8,187)
- Sales & Telemarketing (4,167)
- Business Consulting (11,887)
- Legal (2,567)
- Finance & Accounting (4,657)

Top Freelancer Locations

United States (200,619)	Australia (3,307)
India (60,212)	Bangladesh (2,694)
United Kingdom (10,387)	Romania (2,494)
Canada (9,133)	Indonesia (2,332)
Pakistan (7,731)	Russian Federation (2,223)
Philippines (5,221)	Uruguay (1,847)

DISTRIBUTION OF FREELANCE ENTREPRENEURS



Area	Total Number of Freelancers	Writing, Editing & Translation	Administrative support	Programming & Databases	Graphic Design & Multimedia	Websites & Ecommerce	Other
North Carolina	6,435	34%	19%	13%	11%	10%	13%
Raleigh-Durham	2,230	17%	17%	16%	10%	10%	30%
Charlotte	2,247	14%	16%	11%	11%	8%	40%
Asheville	465	26%	16%	10%	8%	13%	27%
Burlington	71	27%	30%	7%	6%	7%	23%
Fayetteville	210	21%	29%	9%	11%	9%	24%
Greensboro	889	20%	18%	12%	13%	9%	28%
Hickory	154	17%	26%	10%	10%	12%	25%
Jacksonville	155	17%	31%	5%	12%	6%	29%
Greenville	110	17%	32%	14%	12%	5%	20%
Wilmington	244	25%	18%	7%	12%	9%	29%
Elizabeth City	46	17%	35%	9%	7%	15%	17%
Rocky Mount	88	24%	31%	9%	10%	9%	17%

Freelancers within 30 mile radius of Zip: 27514 (N= 1,578)

Programming & Databases (287)	Illustration & Art (50)
Writing, Editing & Translation (281)	Photography & Videography (41)
Administrative Support (217)	Sales & Marketing (26)
Website & Ecommerce (153)	Broadcasting (25)
Graphic Design & Multimedia (148)	Finance & Accounting (22)
Business Consulting (101)	Legal (18)
Networking & Telephone Systems (76)	ERP & CRM (14)
Engineering & CAD (57)	Fashion & Interior Design (8)
Marketing & Communications (54)	

THE END

