

DCHC STATE OF THE REGION SUMMARY 2019

**2019
STATE OF
THE REGION**

DCHC
Metropolitan Planning Organization
Planning Tomorrow Today



Prepared by: RENAISSANCE
PLANNING



POPULATION &
DEMOGRAPHICS



ECONOMY



REGIONAL
STRUCTURE



MOBILITY



SAFETY

- The State of the Region report covers five topics relevant to understanding transportation and growth dynamics in the region.
- Each chapter contains an introductory section; key findings for each topic are introduced and discussed.
- At the end of each chapter are a series of metrics that help understand the dynamics of the chapter's topic.
- Each metric has indicators telling the story of the state of the region.

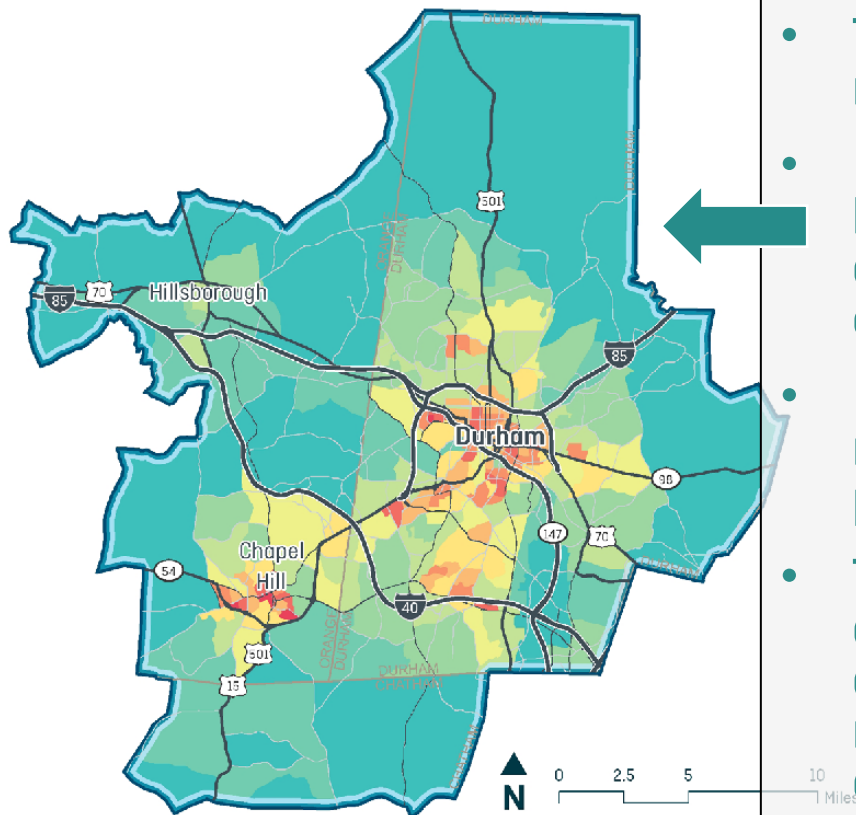
PEER REGION COMPARISONS

DCHC



- Peer comparisons highlight similarities and differences in selected metrics for the DCHC region compared to peer regions across the country.
- Peer regions (metropolitan statistical areas or MSA) were selected based on a variety of factors including relative similarity to the DCHC region. Factors considered include:
 - Demographic growth trends and characteristics
 - Economic trends and characteristics
 - Population trends and characteristics.

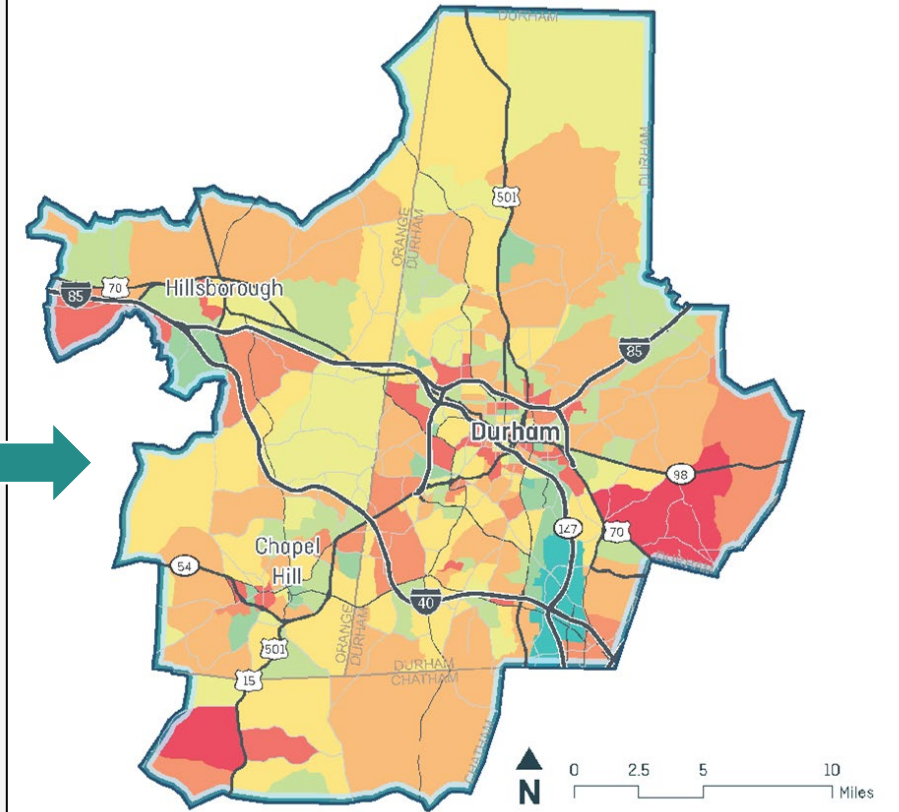
1 | POPULATION & DEMOGRAPHICS: DENSITY



POPULATION PER SQUARE MILE BY BLOCK GROUP



- The region is growing rapidly
- Population density is highest in city centers and along transportation corridors.
- Recent growth has been most pronounced in peripheral locations.
- There are spatial disparities in educational attainment, income, and race characteristics across the region.

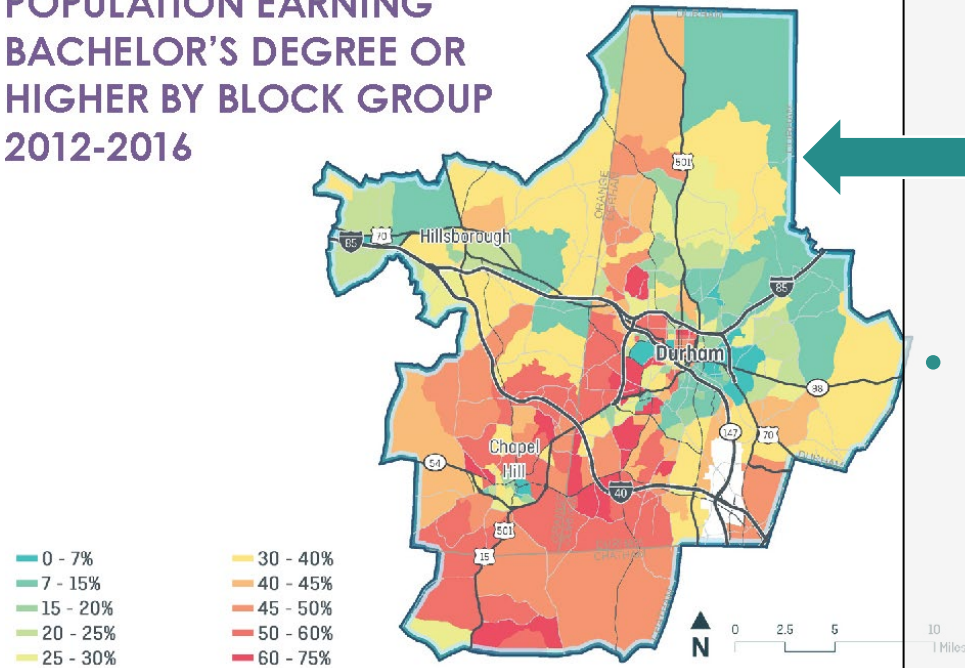


POPULATION DENSITY CHANGE BY BLOCK GROUP



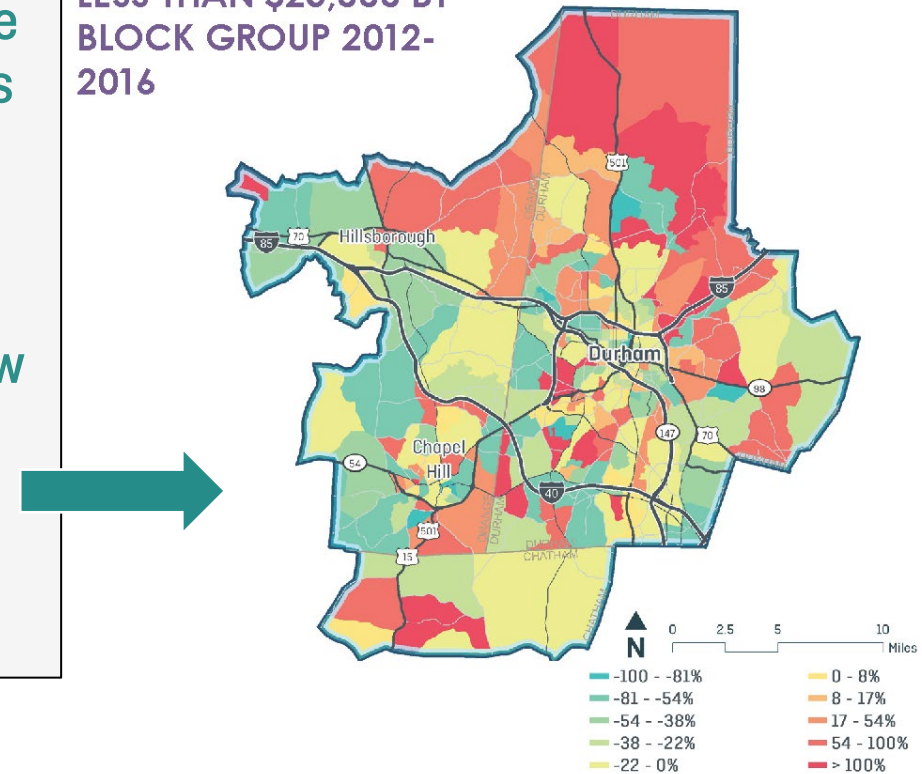
1 | POPULATION & DEMOGRAPHICS: EDUCATION AND INCOME

PERCENTAGE OF POPULATION EARNING BACHELOR'S DEGREE OR HIGHER BY BLOCK GROUP 2012-2016



- The western and southern portions of the region have high shares of residents with bachelor's degrees or higher.
- Notable increases in low income households are observed in areas with lower educational attainment

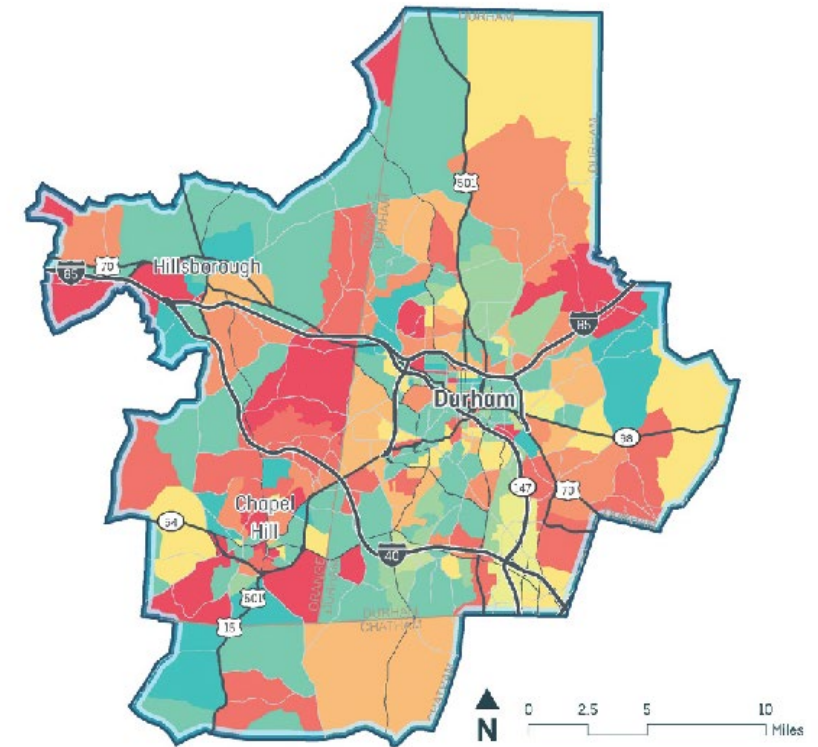
CHANGE IN NUMBER OF HOUSEHOLDS EARNING LESS THAN \$25,000 BY BLOCK GROUP 2012-2016



1 | POPULATION & DEMOGRAPHICS: RACE

- The Black/African American population has declined in many block groups in central Durham and grown in eastern and northern Durham County, eastern Orange County, and northern Chatham County.
- The Asian population is growing throughout the region, notably doubling in some areas of Chapel Hill.
- Northern and central Orange County have seen significant growth in Hispanic populations; the percentage has doubled in some areas.

CHANGE IN AFRICAN AMERICAN POPULATION BY BLOCK GROUP 2012-2016



1 | POPULATION & DEMOGRAPHICS: PEERS

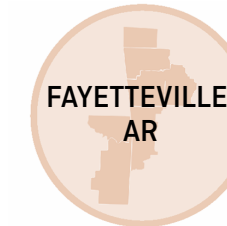
Income Change

Increase in households earning \$125,000 or more and a decrease in those earning less than \$25,000. These trends are most similar to Raleigh and Seattle among peer communities



Diversity

Increases in Asian residents and residents identifying as two or more races. DCHC trends are most similar to those observed in Fayetteville, AR.



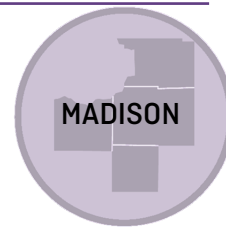
Educational Attainment

Percentage of population with a bachelor's degree and with post-graduate degrees has increased. These changes reflect a metropolitan trend, as Raleigh is the most similar peer.



Age

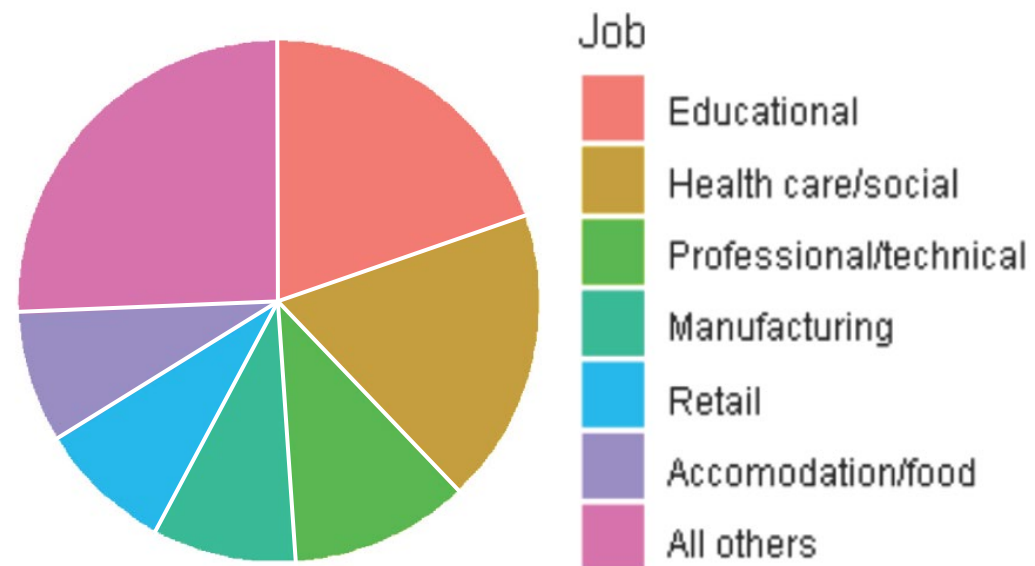
Increases in residents 65 years and up; decreases in younger population groups. Similar trends are observed in all peer regions except Seattle and Charlotte.



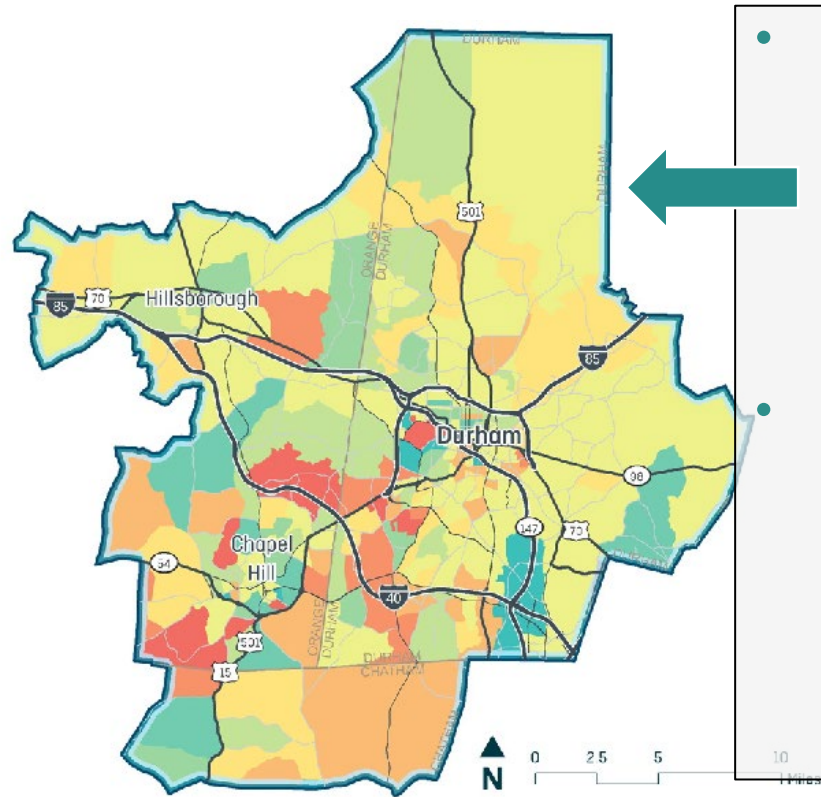
JOBS

- The **educational services** and **health care/social services** sectors each account for nearly one in five jobs in the region.
- **Educational services** grew more than any other sector between 2016 and 2017.
- **Health care/ social services** declined slightly between 2016-2017.

MIX OF JOBS BY INDUSTRY FOR THE DCHC REGION (2017)

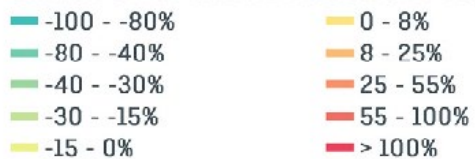


2 | ECONOMY: HOUSING AFFORDABILITY

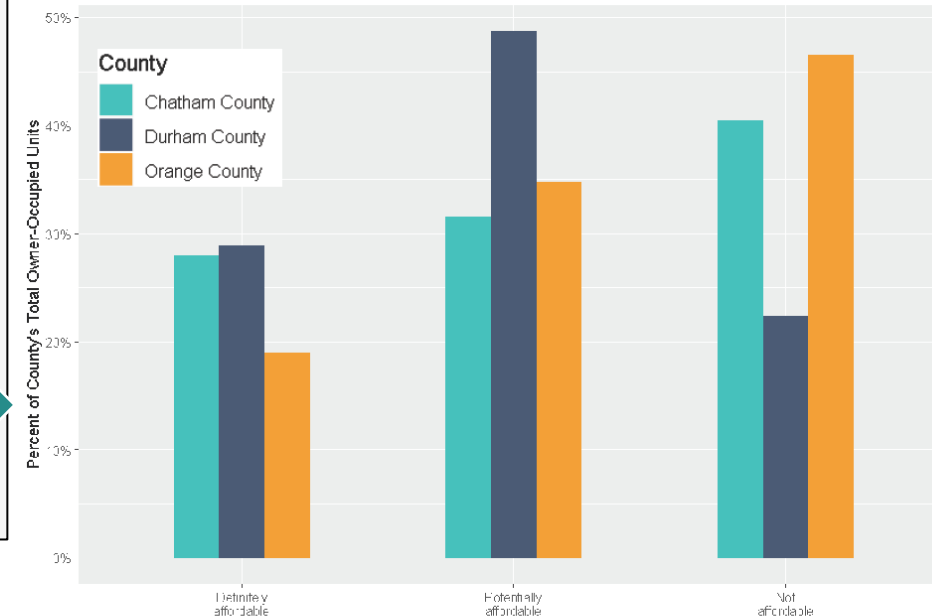


- Affordable housing is declining in many parts of the region, especially in areas with existing multimodal transportation infrastructure.
- Workers earning the area median income will most likely find housing in Durham or Chatham County.

CHANGE OF AFFORDABLE HOUSING BY BLOCK GROUP



HOUSING AFFORDABILITY BY COUNTY 2016

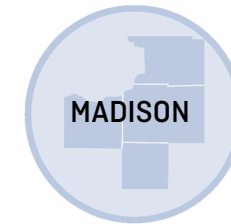


In Chatham County, the median home value is \$251,603. The affordable value is \$260,762.
 In Durham County, the median home value is \$195,903. The affordable value is \$246,354.
 In Orange County, the median home value is \$263,003. The affordable value is \$296,269.



Jobs

High shares of education and health care jobs, which is most similar to Madison, WI. DCHC region has higher shares of technical professionals relative to Madison, which has more public administration jobs as the state capital.



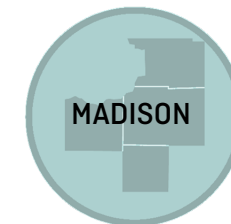
Income

Household income is notably lower in DCHC compared to Madison, Raleigh, and Seattle. The most similar peer region is Charlotte.



Home Value

The median home value in the DCHC region is around \$212,000. This is higher than Charlotte, Huntsville, and Fayetteville (AR), lower than Seattle, and similar to Raleigh and Madison.

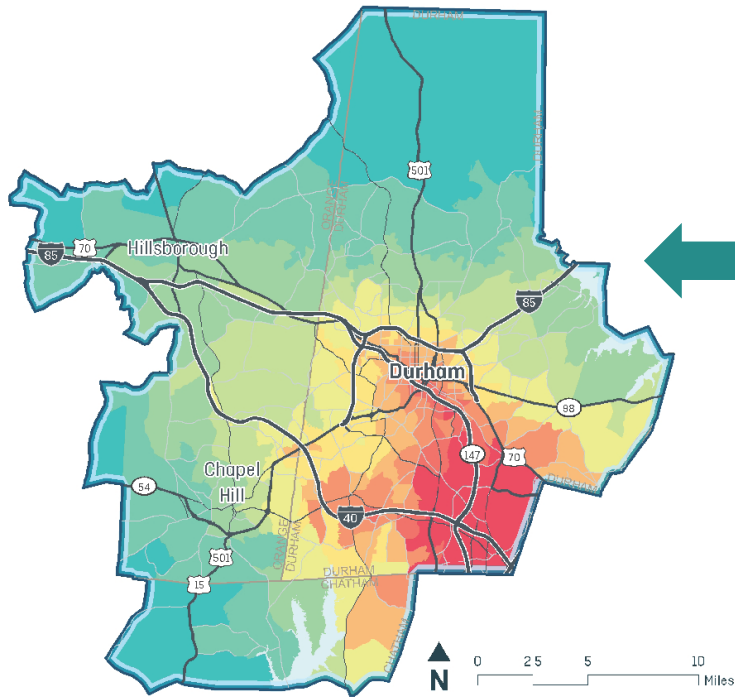


Home Affordability

About 30% of the DCHC region's housing stock is unaffordable to households earning the area median income. This is most similar to Seattle.



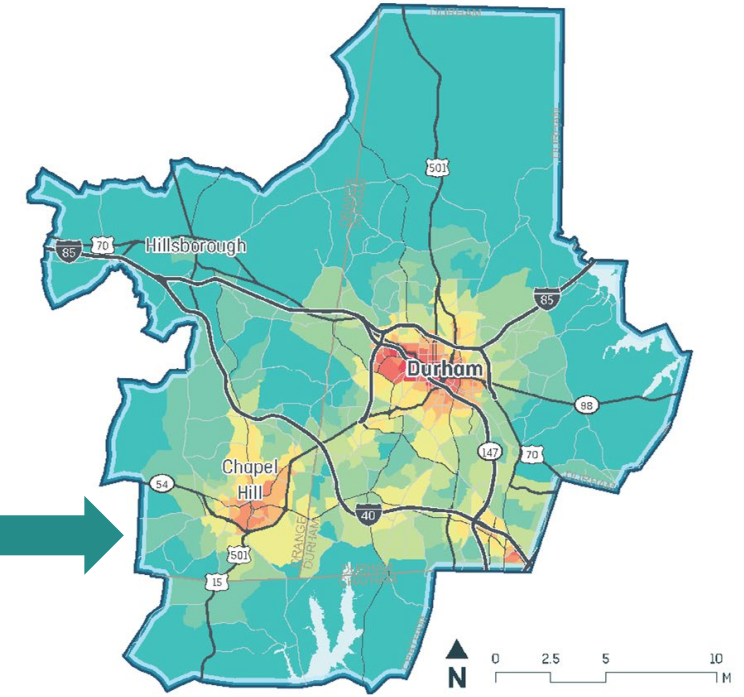
3 | REGIONAL STRUCTURE: ACCESS TO JOBS



Total number of jobs available to residents within a reasonable commute time.

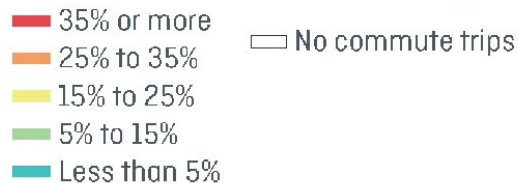
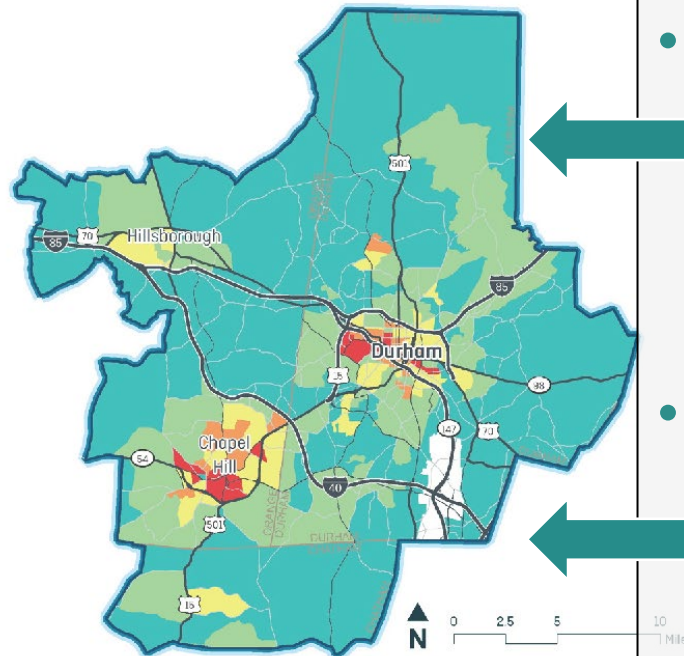


- Research Triangle Park is the geographical center of the Triangle region with the highest numbers of jobs reachable by driving.
- Traditional city centers are the only locations with strong access to jobs by transit. Transit access to jobs from areas proximate to RTP is very low relative to auto access.



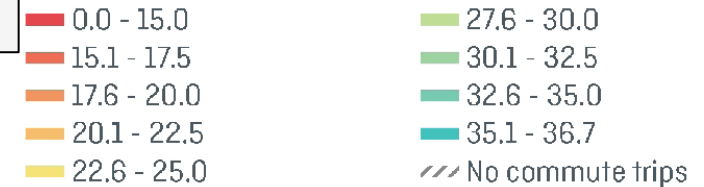
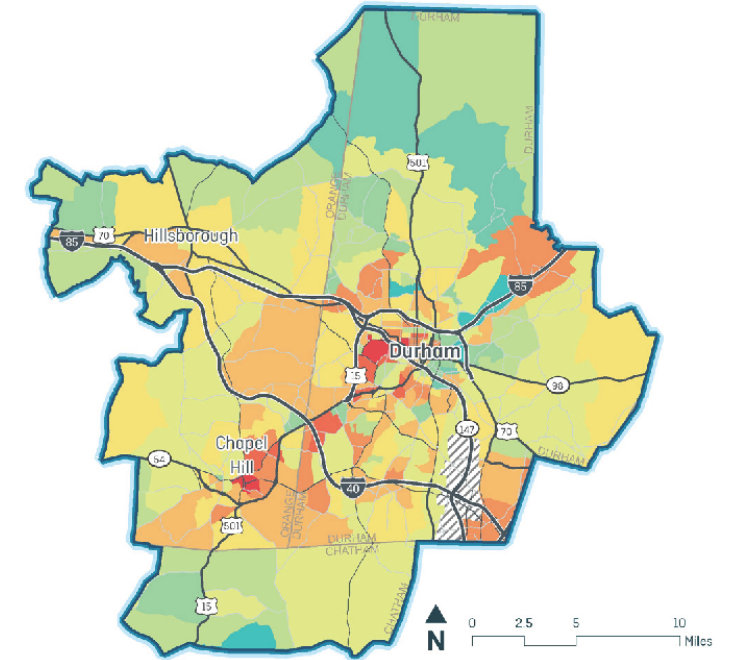
3 | REGIONAL STRUCTURE: TRAVEL BEHAVIOR

NON-AUTO MODE SHARE 2016



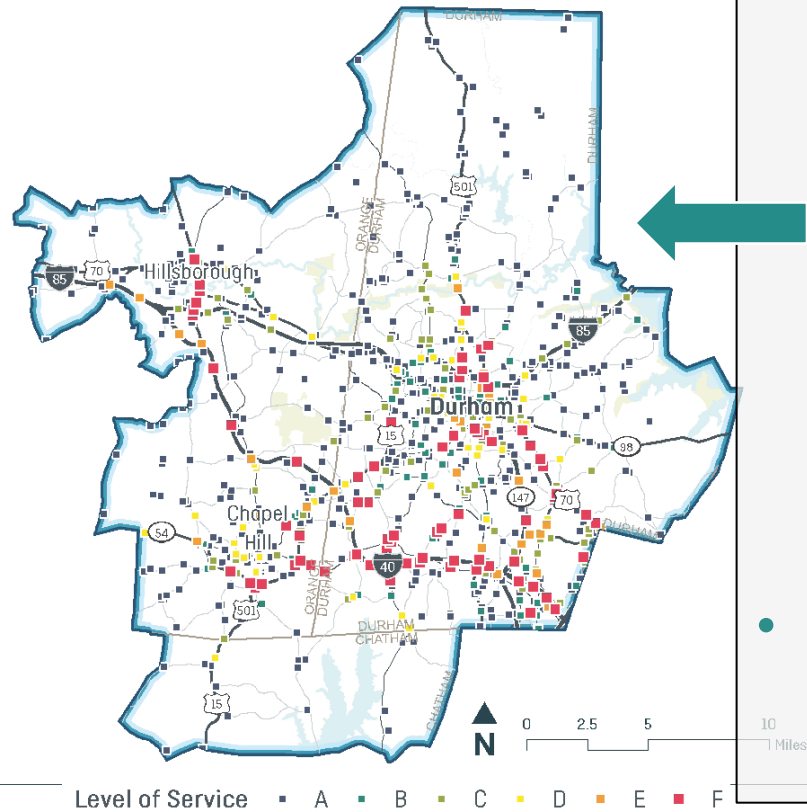
- Urban centers have the highest non-auto mode shares and shortest average commute times.
- Automobiles remain the most common mode choice in the most rapidly growing areas.

AVERAGE COMMUTE TIME BY BLOCK GROUP 2016



4 | MOBILITY: HIGHWAY PERFORMANCE

VEHICULAR LEVEL OF SERVICE 2017

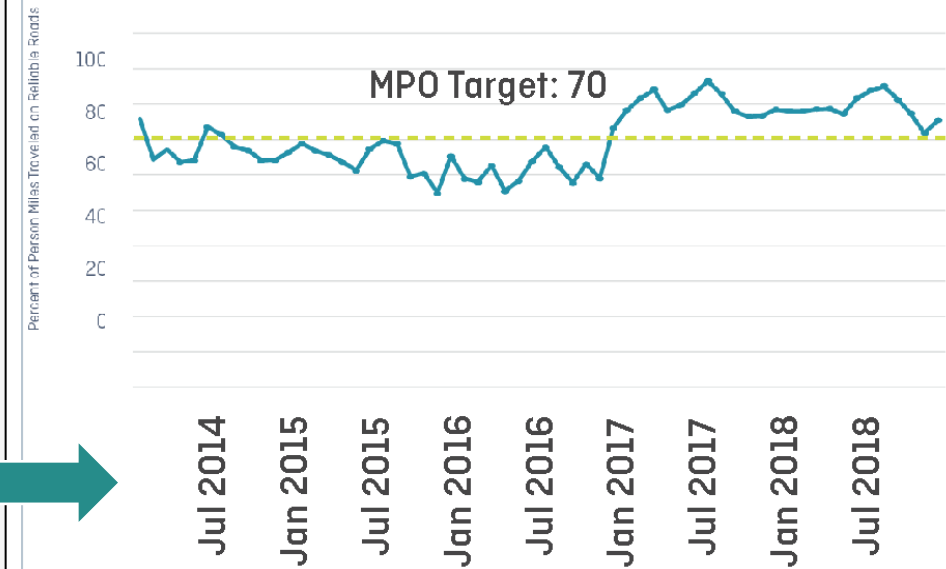


- Overall, LOS in the DCHC area remains adequate, but LOS has declined on 58.6 percent of roads since 2013. Major corridors experiencing a downward trend in LOS include:

- I-40
- US 70
- NC 54
- US 15-501

- Travel time reliability metrics remain at or near MPO targets.

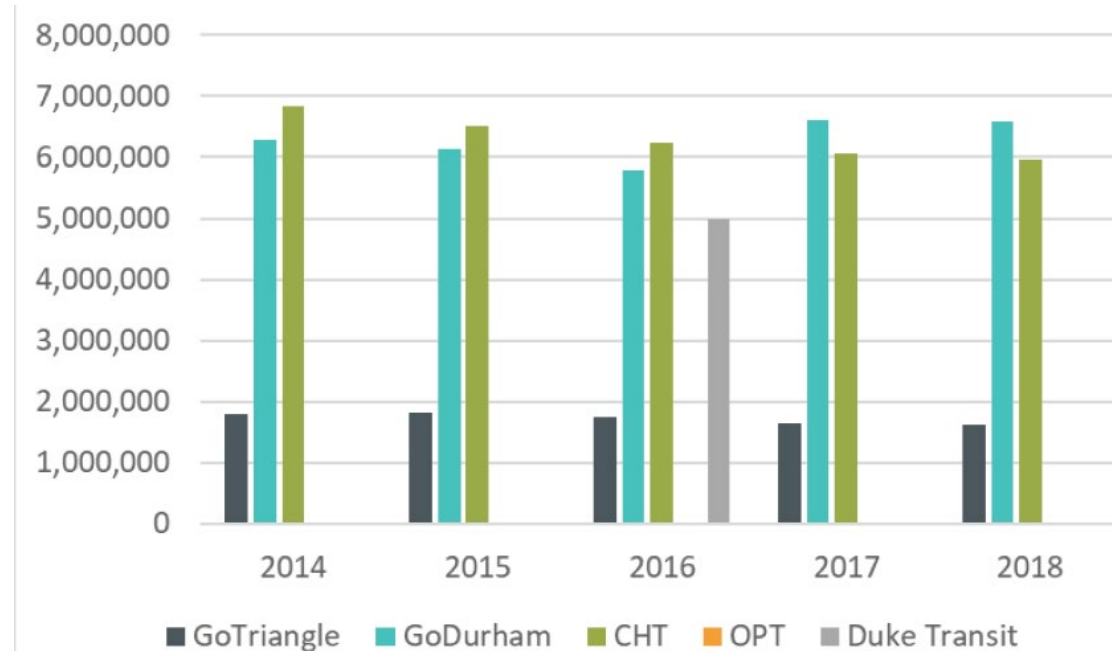
NON-INTERSTATE NHS TRAVEL TIME RELIABILITY MEASURE 2014-2018



4 | MOBILITY: TRANSIT PERFORMANCE

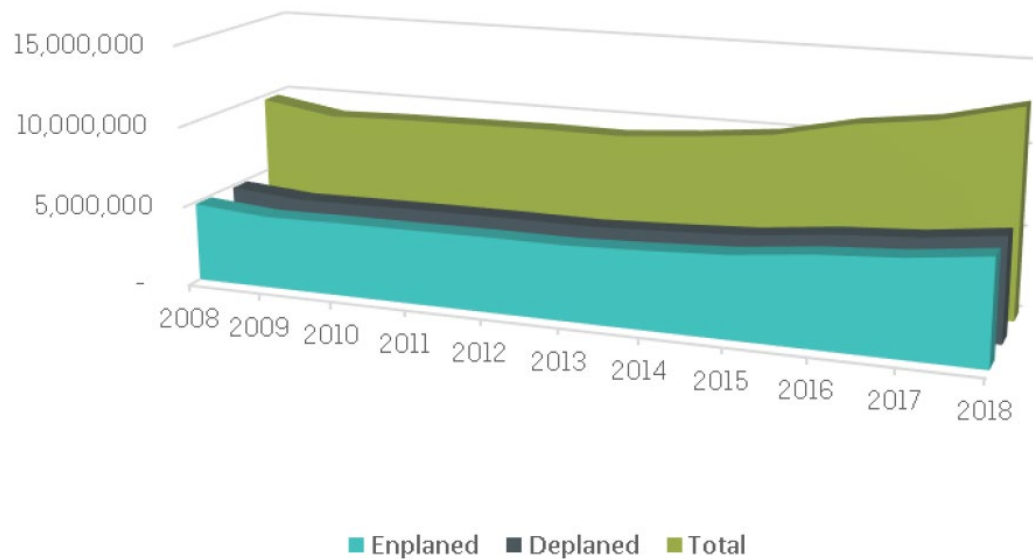
- Overall transit ridership has remained stable in the last five years, with ridership declines on CHT offset by increases on GoDurham.
- Demand-response ridership for GoTriangle increased by more than 50 percent from 2017 to 2018.

TRANSIT RIDERSHIP: FIXED ROUTE

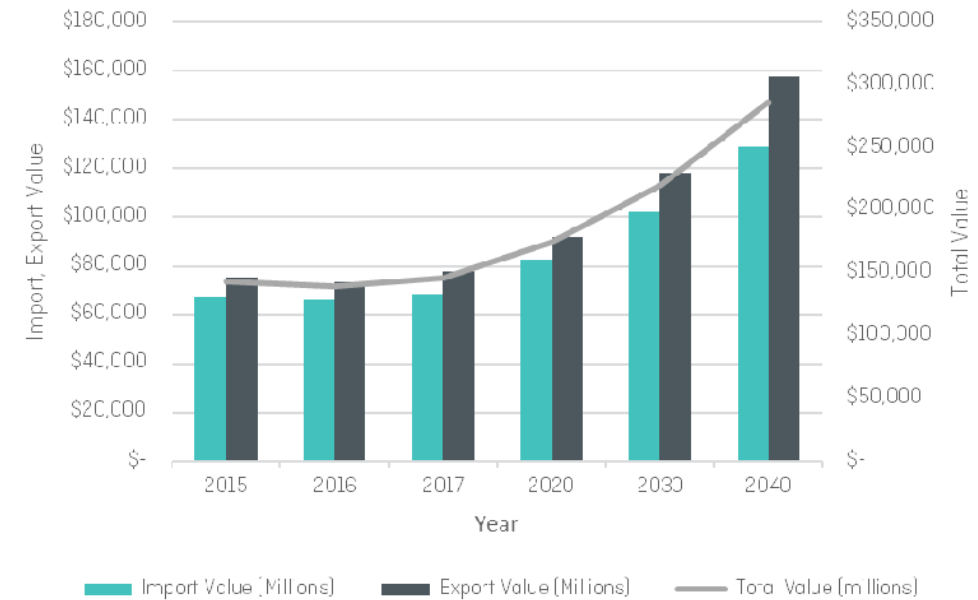


4 | MOBILITY: AIR AND FREIGHT

RDU AIR TRAVEL TRAFFIC 2008-2018



DCHC REGION FREIGHT VALUE 2015-2040

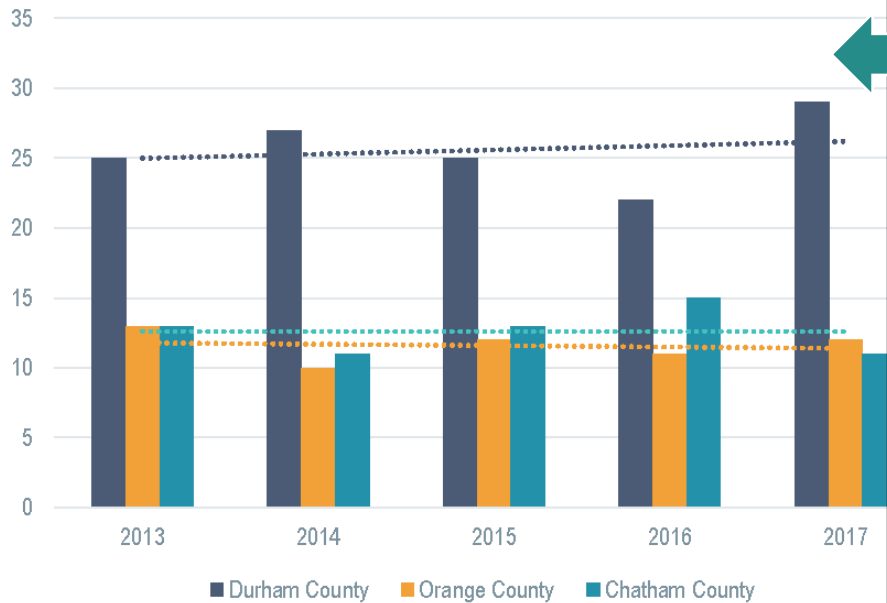


- Air traffic at RDU airport has steadily increased in recent years.
- The total value of freight moving into and out of the region has increased substantially.



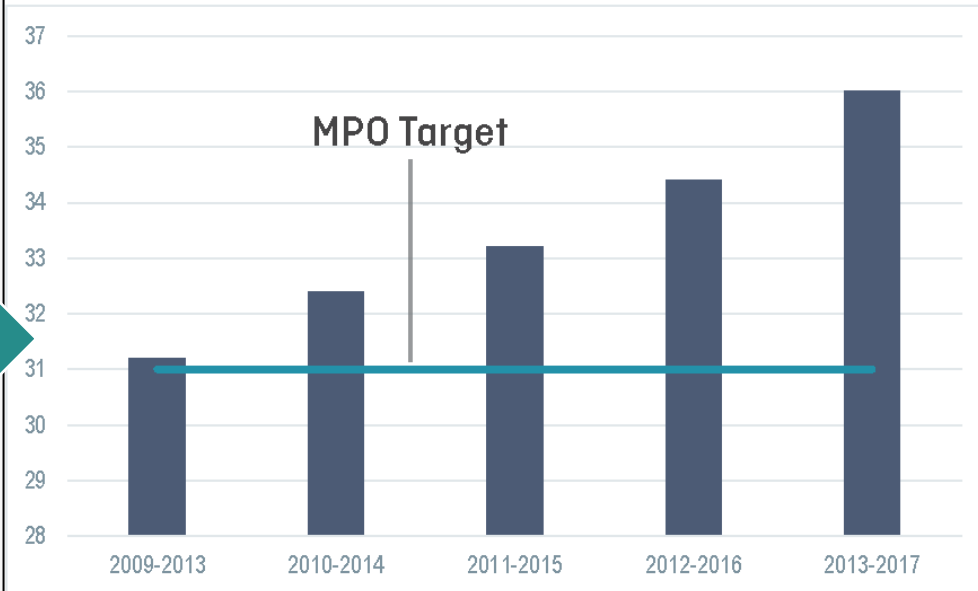
5 | SAFETY: MOTORIZED FATALITIES AND INJURIES

Total Vehicular Fatalities by County 2013-2017

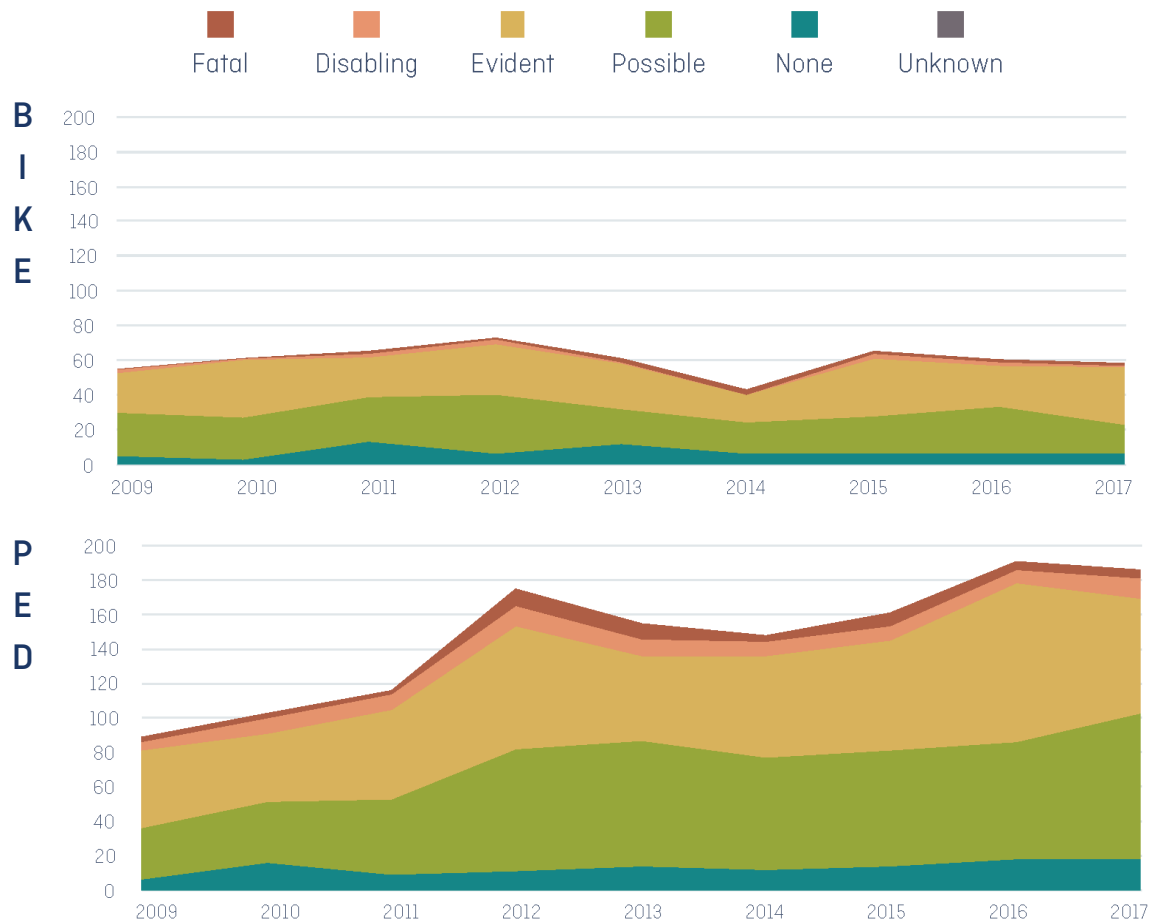


- In the last five years, vehicular fatalities in the region have been stable.
- However, the rolling five-year average of motorized fatalities and serious injuries has steadily increased and is above the MPO target.

Motorized Fatalities and Serious Injuries (5-year averages)



5 | SAFETY: NON-MOTORIZED CRASHES



- Pedestrian crashes have increased throughout the region.
- Bicycle crashes have remained stable, with a notable dip in 2014.
- Only a small share of non-motorized incidents result in fatalities or serious injuries.



THANK YOU



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