

Disruptive Demographics and the American South



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May 2013

OVERVIEW

- Demographic Trends
- Challenges & Opportunities
- Discussion

what CENSUS 2010 will REVEAL



May 2013

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6 DISRUPTIVE TRENDS

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



The South

Continues To Rise

...Again!

May 2013

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%

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

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%

Migration-Induced Population Change

Domestic and International

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

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= 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



A Brief Immigration History

Legal Immigration to United States

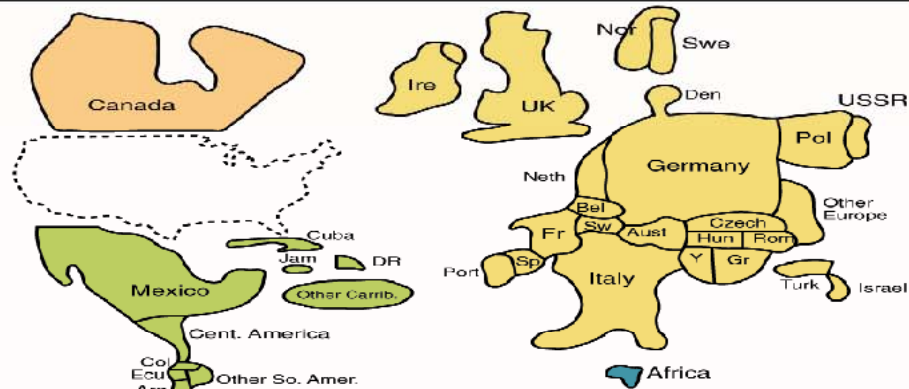
1921-1960

40 years

Area Proportional to
Number of Immigrants

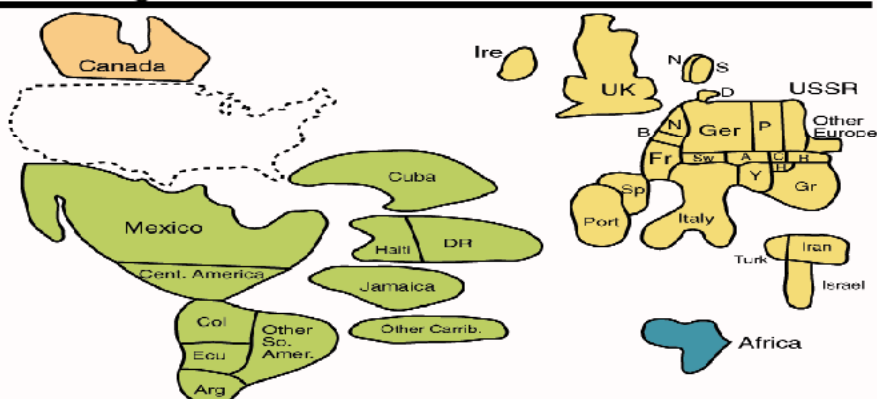
10,000

100,000



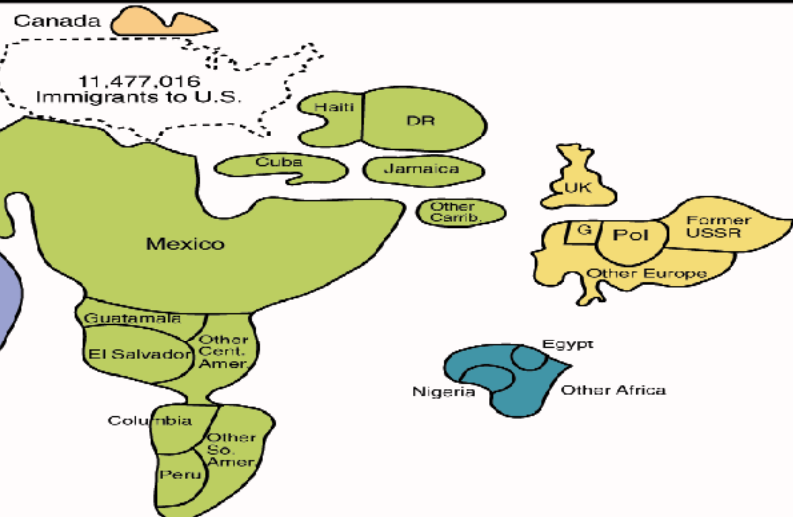
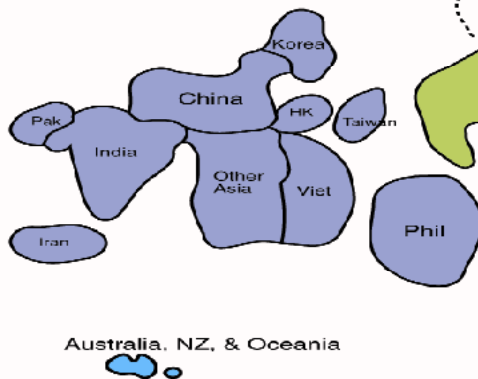
1961-1986

16 years



1987-1998

12 years



The Numbers

Legal Immigrants

Year	Annual Flow
1920-1961	206,000
1961-1992	561,000
1993-1998	800,654
1999-2004	879,400
2005-2008	1,137,000
2009-2012	1,067,000

Refugees, Parolees, Asylees

Year	Annual Flow
1961-1993	65,000
1994-1998	107,000
1999-2004	85,500
2005-2008	75,000
2009-2012	92,500

The Numbers Cont'd

• Illegal Immigrants

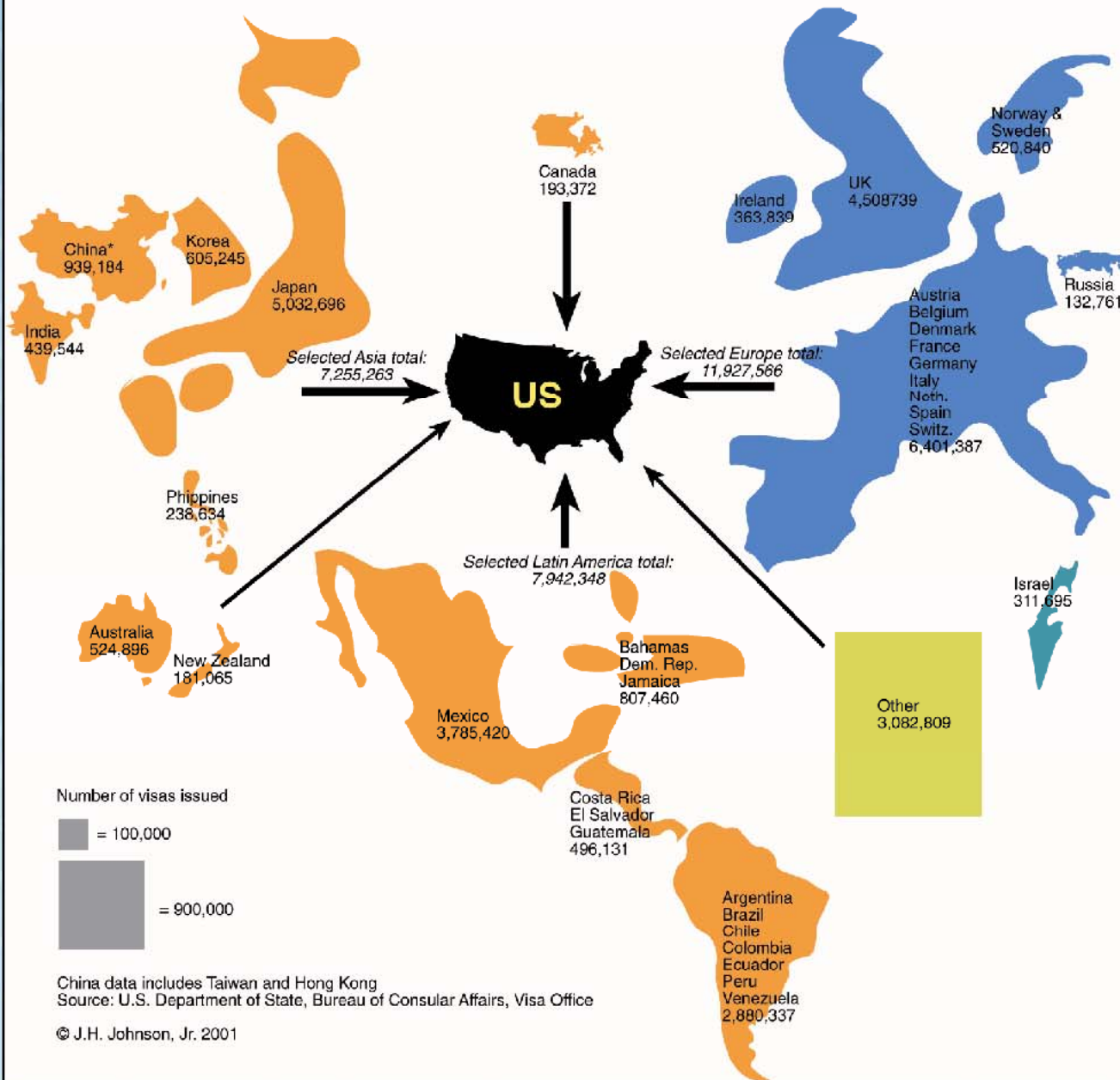
- 300,000 to 400,000 annually over the past two decades
- Three million granted amnesty in 1986
- 2.7 million illegal immigrants remained after 1986 reforms
- October 1996: INS estimated there were 5 million illegal immigrants in U.S.
- Since August 2005: Estimates of illegal population have ranged between \$7 million and \$15 million
- Today: An estimated 11.5 million unauthorized immigrants reside in U.S.

NON-IMMIGRANTS ADMITTED TO UNITED STATES, SELECTED YEARS, 1981-2011

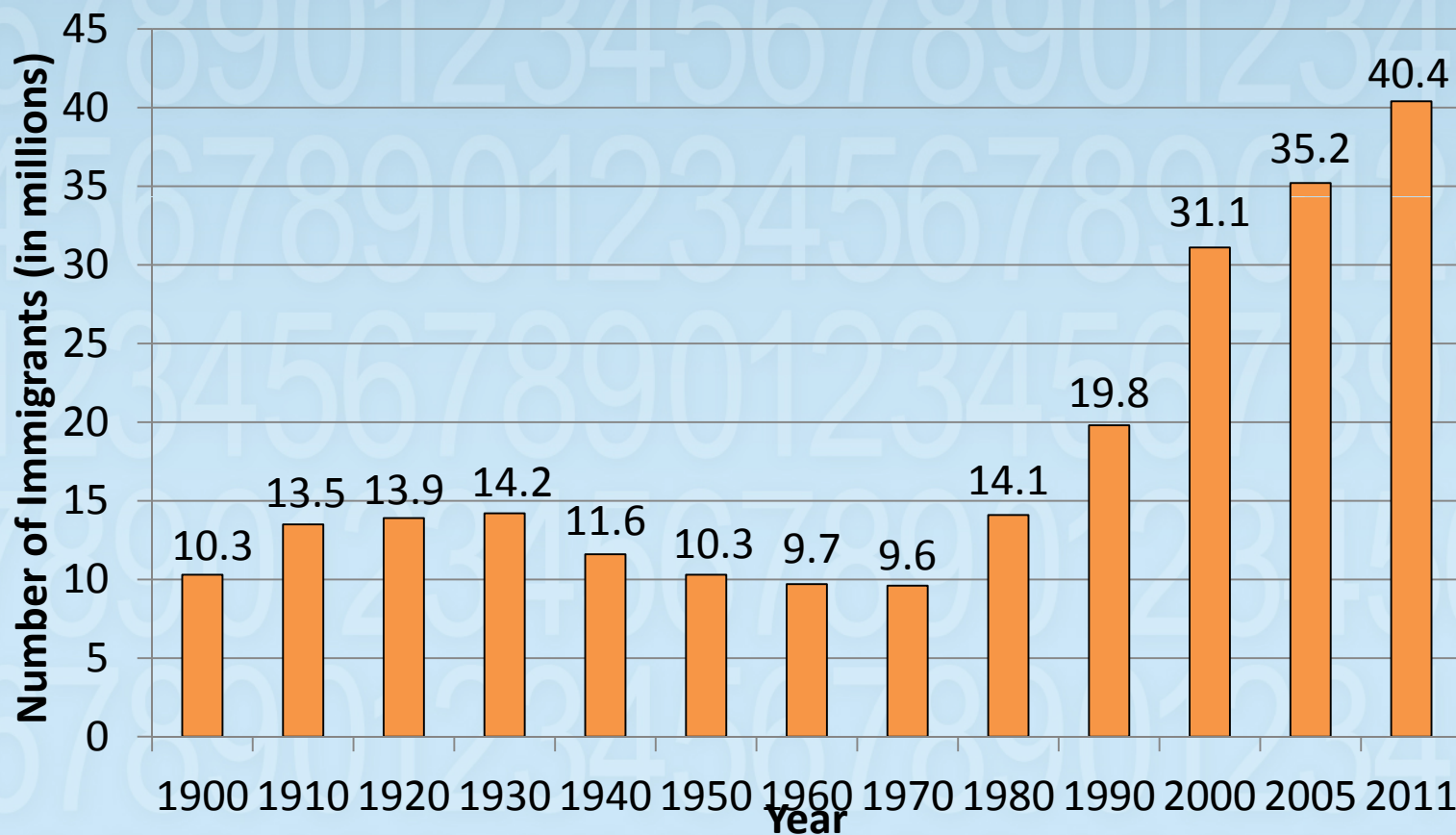
Year	All Classes	Exchange Visitors	Academic & Vocational Students
1981	11,756,903	108,023 (1%)	271,861 (2%)
1985	9,539,880	141,213 (1%)	285,496 (3%)
1990	17,574,055	214,644 (1%)	355,207 (2%)
1995	22,640,540	241,364 (1%)	395,480 (2%)
2000	33,690,082	351,743 (1%)	699,953 (2%)
2001	32,824,088	389,435 (1%)	741,921 (2%)
2002	27,907,139	370,176 (1%)	687,506 (2%)
2008	39,381,928	506,138 (1%)	917,373 (2%)
2011	53,082,286	526,931 (1%)	1,702,730 (3%)

Non-Immigrants Arriving in United States by County of Citizenship, 1999

(Issuance of Non-residence visas, fiscal year 1999)



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

THE “BROWNING” OF AMERICA

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%

Non-White and Hispanic Shares of Population, 2000-2010

Area	Absolute Population Change	Non-White Share	Hispanic Share
US	27,323,632	91.7	55.5
South	14,318,924	79.6	46.4
Texas	4,293,741	89.2	65.0
Florida	2,818,932	84.9	54.7
Georgia	1,501,206	81.0	27.9
NC	1,486,170	61.2	28.3

MEDIAN AGE OF U.S. POPULATION BY RACE, HISPANIC ORIGIN & GENDER, 2009

Race	Total	Male	Female
United States	36.8	35.4	38.2
White Alone	38.3	37.0	39.6
White, Non-Hispanic	41.2	39.9	42.6
Black Alone	31.3	29.4	33.3
AI/AN Alone	29.5	29.0	30.2
Asian Alone	33.6	32.6	34.6
NH/PI Alone	29.9	29.5	30.3
Two or More Races	19.7	18.9	20.5
Hispanic	27.4	27.4	27.5

MEDIAN AGE AND FERTILITY RATES FOR FEMALES IN SOUTH, 2005-2010

Demographic Group	Median Age	Fertility/1000 Women
All Women	37.7	58
White, Non-Hispanic	42.8	50
African American	30.0	61
American Indian & Native Alaskan	33.5	65
Asian	34.6	63
Native Hawaiian & Pacific Islander	28.7	77
Some Other Race	26.7	88
Two Or More Races	19.6	59
Hispanic	28.3	80
Native Born	37.4	55
Foreign Born	40.4	79

TOTAL FERTILITY RATES OF U.S. WOMEN BY RACE/ETHNICITY, 2007

Race/Ethnicity	Total Fertility Rate
Hispanic	2.99
Non-Hispanic White	1.87
Blacks	2.13
Asian	2.04
Native American	1.86

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).

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

Race/Ethnicity	2005	2050
White	67%	47%
Blacks	12.8%	13%
Hispanics	14%	29%
Asian	5%	9%



Marrying Out

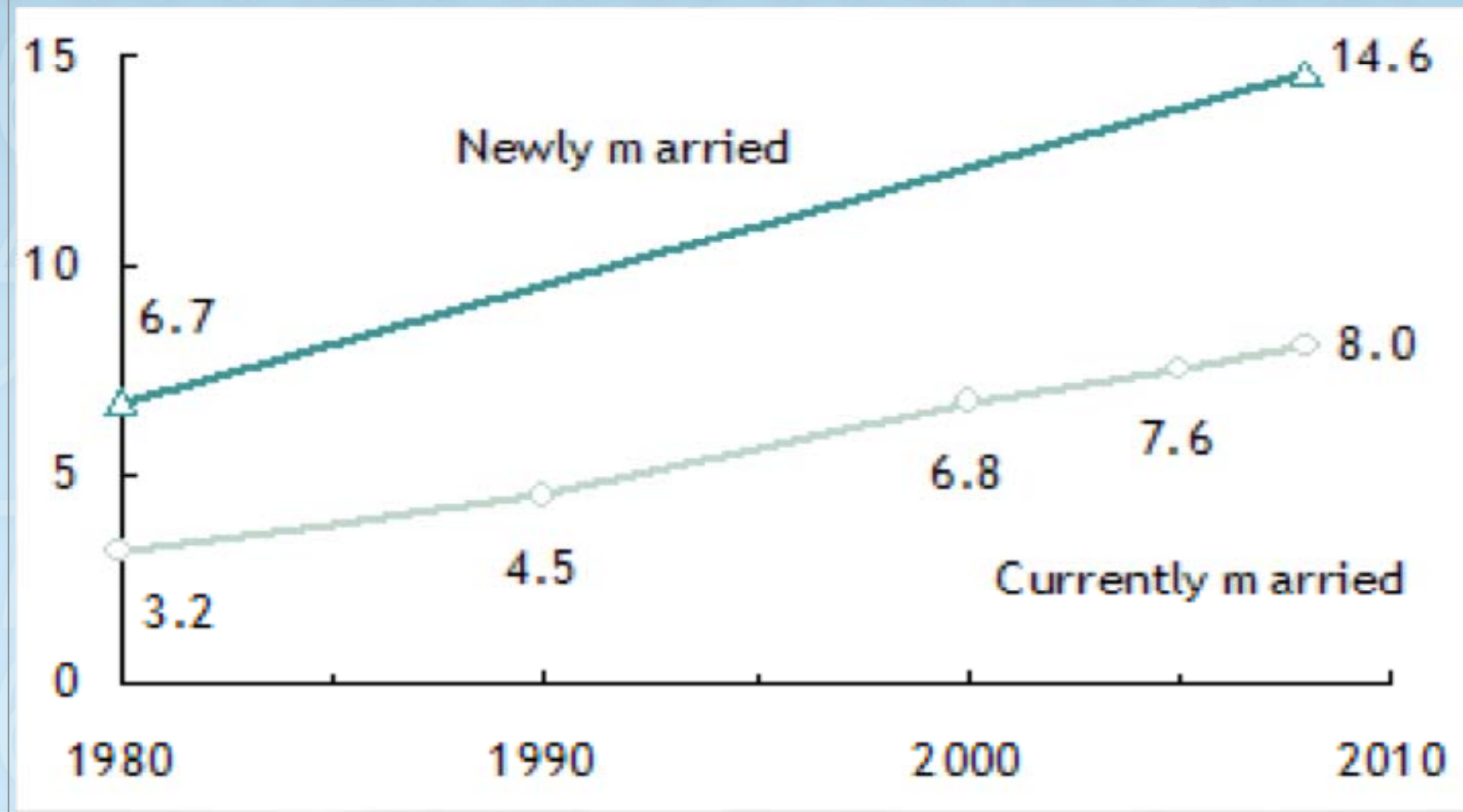
is “In”

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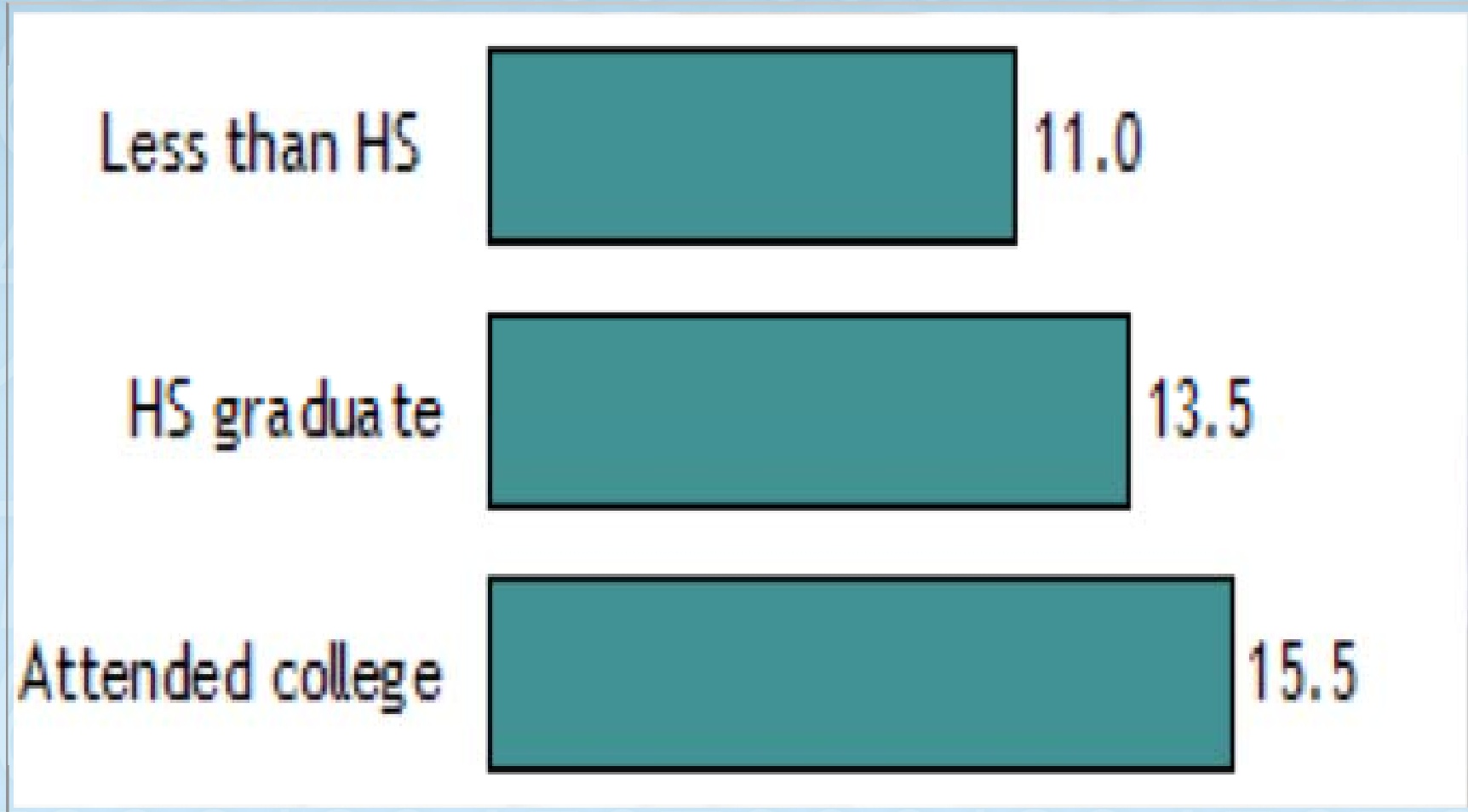
INTERMARRIAGE TREND, 1980-2008

% Married Someone of a Different Race/Ethnicity



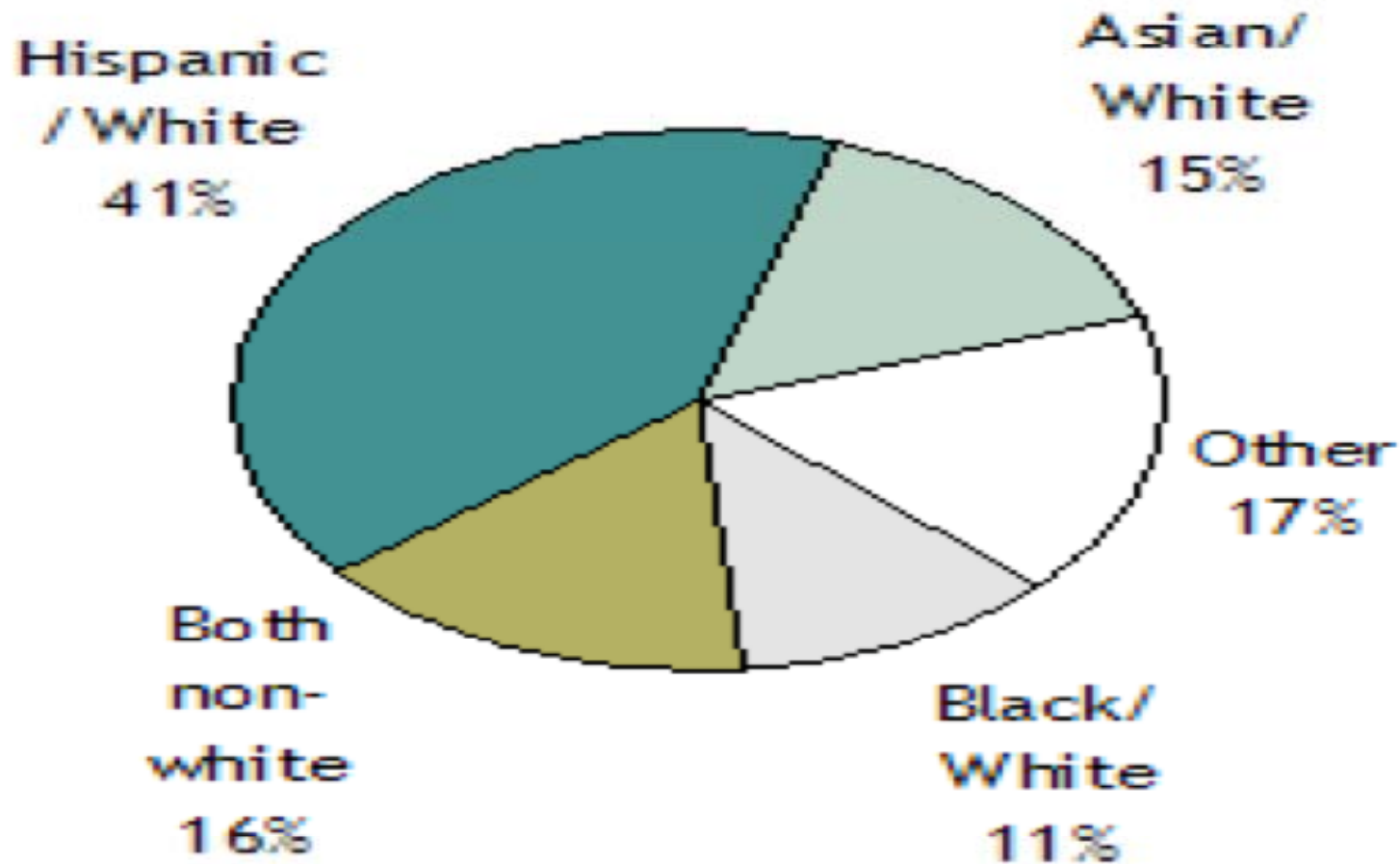
EDUCATION & INTERMARRIAGE

% of Newlyweds Who Married Someone
of a Different Race/Ethnicity, 2008



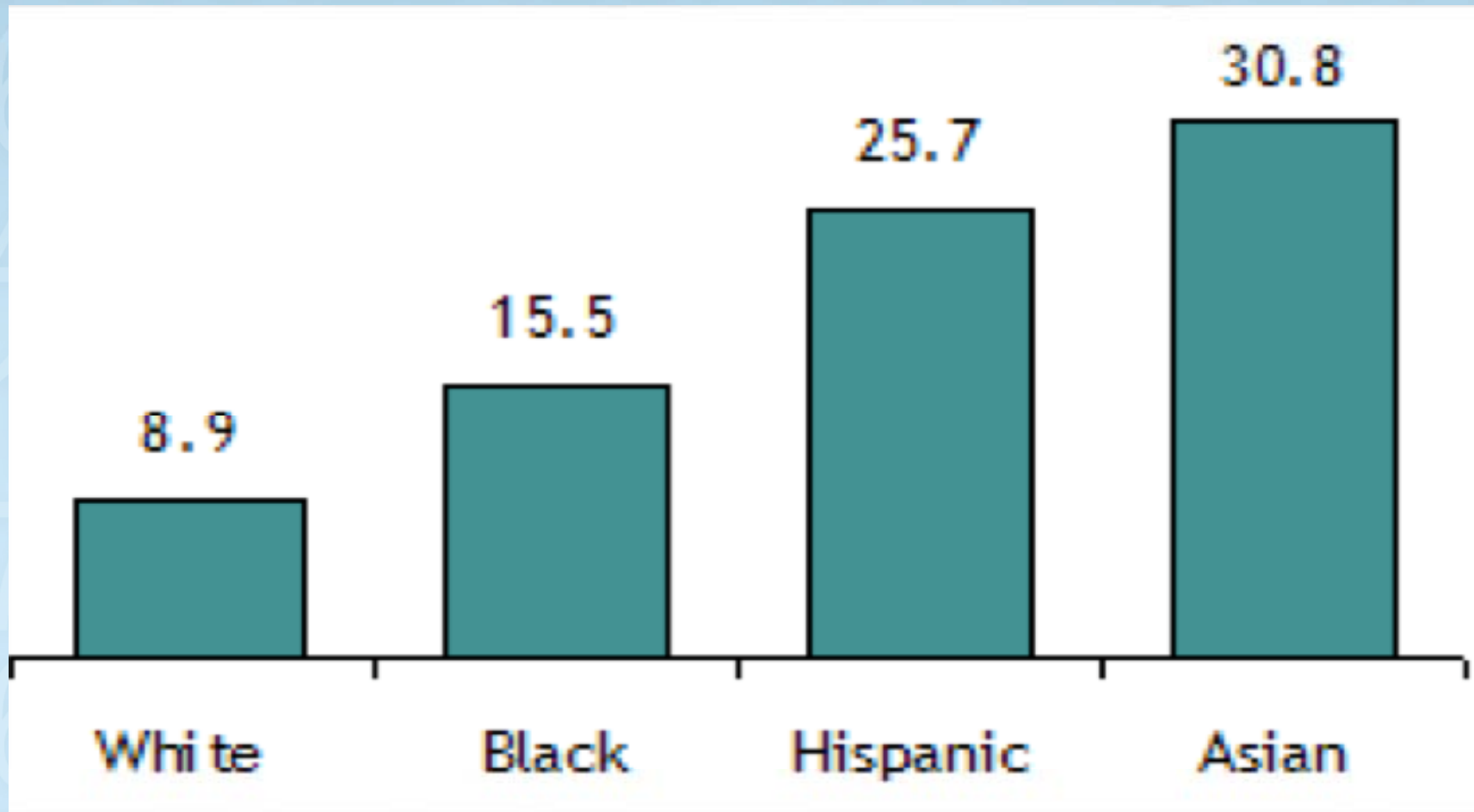
INTERMARRIAGE TYPES

Newly Married Couples in 2008



INTERMARRIAGE RATES BY RACE & ETHNICITY

% of Newlyweds Who Married Someone of a Different Race/Ethnicity, 2008



THE SILVER TSUNAMI

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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

THE GREYING OF AMERICA

U.S. Census Projections



SOURCE: U.S. CENSUS REPORT "65+ IN THE UNITED STATES: 2003" May 2013

ABSOLUTE AND PERCENT CHANGE IN U.S. POPULATION BY AGE

Age	2005	2050	% Change
Total	296	438	50.0
0-17	73	102	39.7
18-64	186	255	37.1
65+	37	81	118.9

OLDER WORKERS IN U.S. WORKFORCE

YEAR

Age 65 or
Older

Age 75 or
Older

1998

11.9%

4.7%

2008

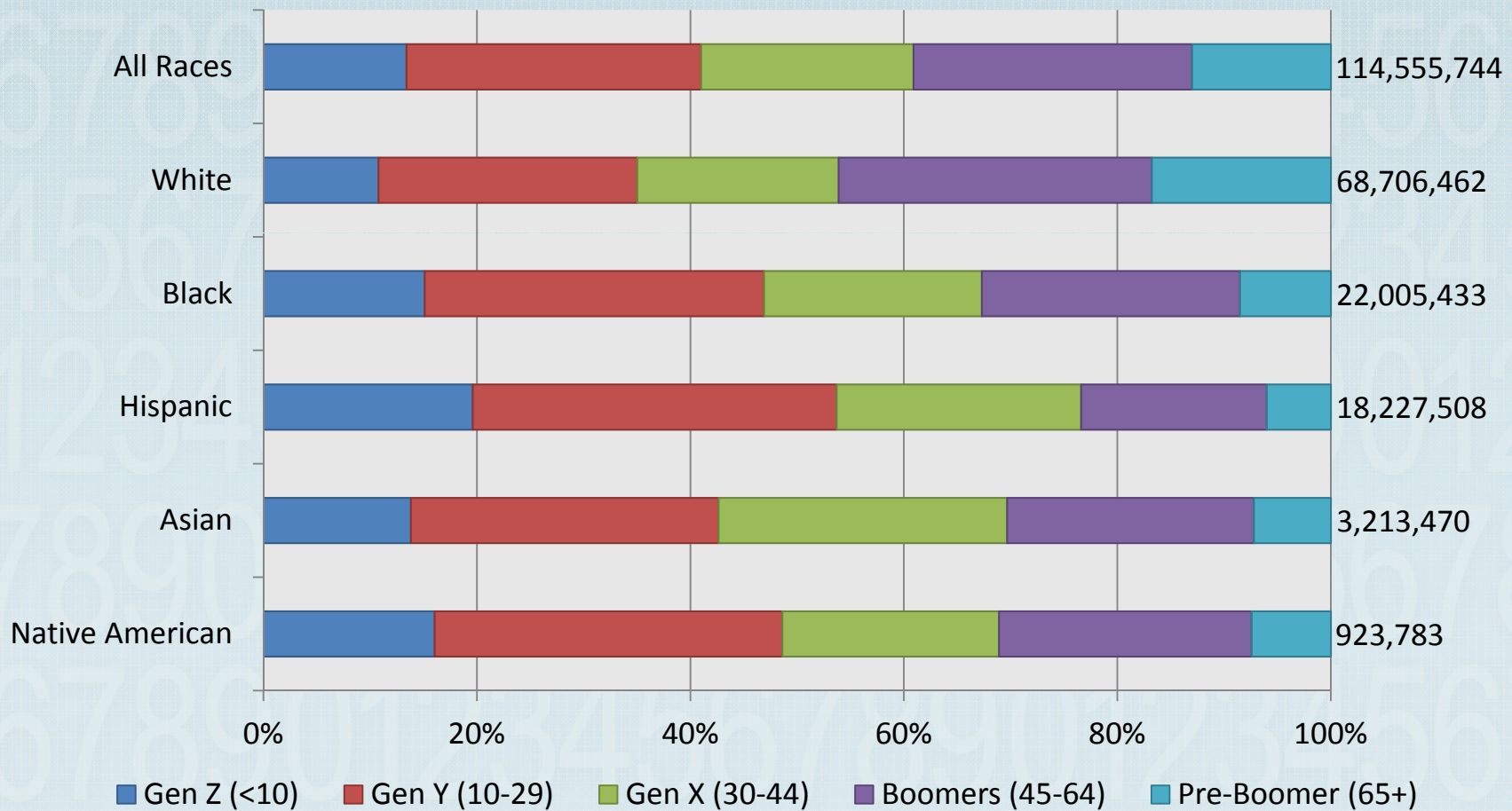
16.8%

7.3%

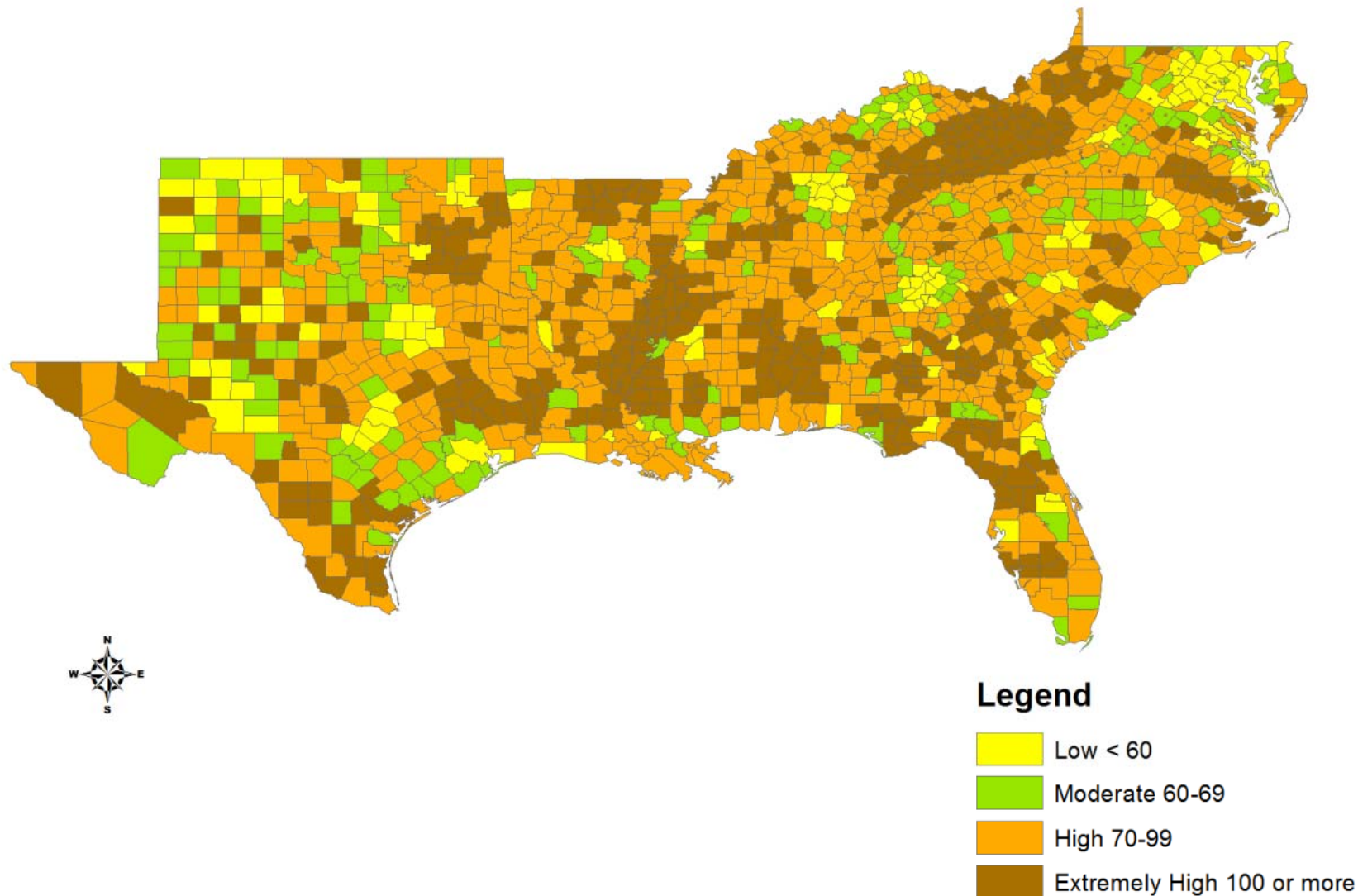
POPULATION CHANGE BY AGE IN THE SOUTH, 2000-2010

Age	2010 Population	Absolute Change 2000-2010	Percent Change 2000-2010
Total	114,555,744	14,318,924	14.3
<10 (Gen Z)	15,346,300	1,284,900	9.1
10-29 (Gen Y)	31,624,788	3,247,518	11.4
30-44 (Gen X)	22,820,248	-401,156	-1.7
45-64 (Boomers)	29,870,423	7,731,944	34.9
65+ (Pre-Boomers)	14,893,985	2,455,718	19.7

GENERATIONAL DISTRIBUTION OF SOUTH'S POPULATION BY RACE/ETHNICITY, 2010



DEPENDENCY RATIOS IN THE AMERICAN SOUTH



Source: Census 2010

DEPENDENCY RATES FOR SELECTED SOUTHERN STATES, 2006-2010

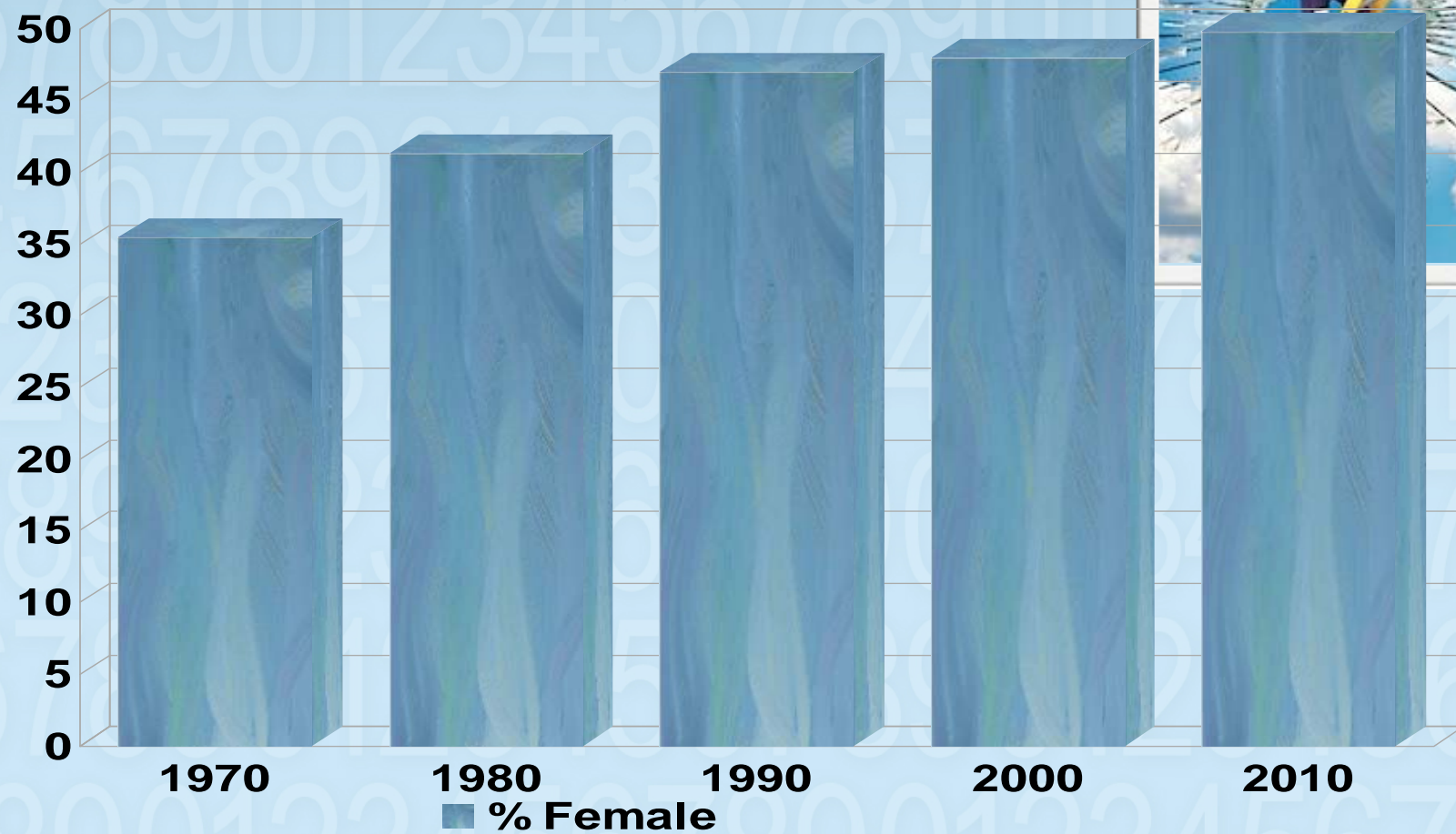
	Dependency Rate
Georgia	67.4
Counties with Population Decline (31)	100.4
Counties Growing 0.1-10% (44)	75.2
Counties Growing 10% or more (84)	62.6
	Dependency Rate
North Carolina	68.7
Tier 1	90.5
Tier 2	71.3
Tier 3	56.6
	Dependency Rate
Alabama	80.9
5 Counties with Greatest % Loss	152.5
5 Counties with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

The image is a collage. The top half features a large, ornate architectural archway in a warm, golden-brown color. Below this, a semi-transparent blue band contains the title 'The End of Men?' in a bold, black, sans-serif font. The bottom half of the image is a collage of several women. In the foreground, a woman with dark hair and a pearl necklace is centered. To her left, a woman in a red jacket is partially visible. To her right, a woman in a blue blazer is prominent. Other women are visible in the background, some smiling and some looking serious. The overall theme appears to be professional women in the workplace.

The End of Men?

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FEMALE WORKFORCE REPRESENTATION



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.

Snapshot of U.S. & NC Disabled Male Populations, 2011

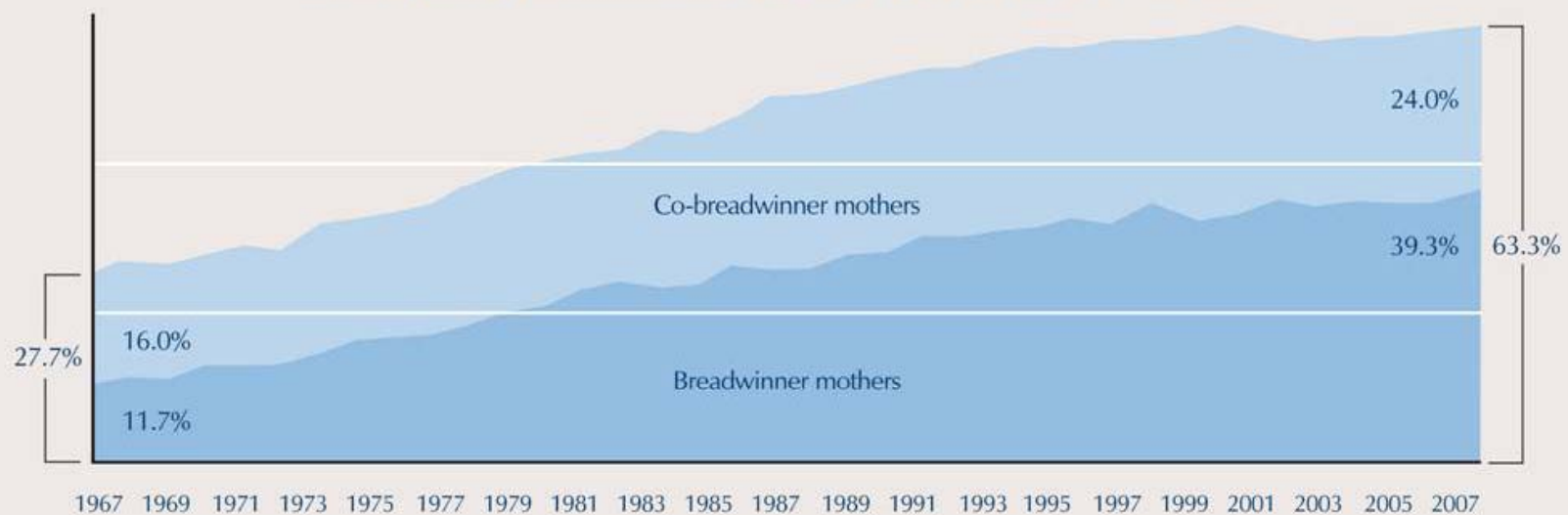
Indicator	United States	North Carolina
Absolute Number	8,622,600	334,200
Prevalence	12.1%	13.3%
Veteran Service Connected Disability	19.1%	18.8%
Employment Rate	33.4%	30.7%
Employed Full-time	20.7%	19.5%
Not working but looking	11.7%	12.2%
Annual Earnings	\$36,700	\$32,600
SSI	19.6%	15.7%
Less than High School	22.4%	24.5%
Uninsured	17.5%	18.8%
Below Poverty Level	27.8%	28.4%

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

Figure 6

THE NEW WORKFORCE: SHARE OF MOTHERS WHO ARE
BREADWINNERS OR CO-BREADWINNERS, 1967 TO 2008



Source: The Shriver Report, "A Woman's Nation Changes Everything," 2009

Source: Heather Boushey and Jeff Chapman's analysis of Miriam King, Steven Ruggles, Trent Alexander, Donna Leicach, and Matthew Sobek. Integrated Public Use Microdata Series, Current Population Survey: Version 2.0 (Machine-readable database). Minneapolis, MN: Minnesota Population Center (producer and distributor), 2009

Notes: Breadwinner mothers include single mothers who work and married mothers who earn as much or more than their husbands. Co-breadwinners are wives who bring home at least 25 percent of the couples' earnings, but less than half. The data only includes families with a mother who is between the ages of 18 and 60 and who has children under age 18 living with her.

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

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%



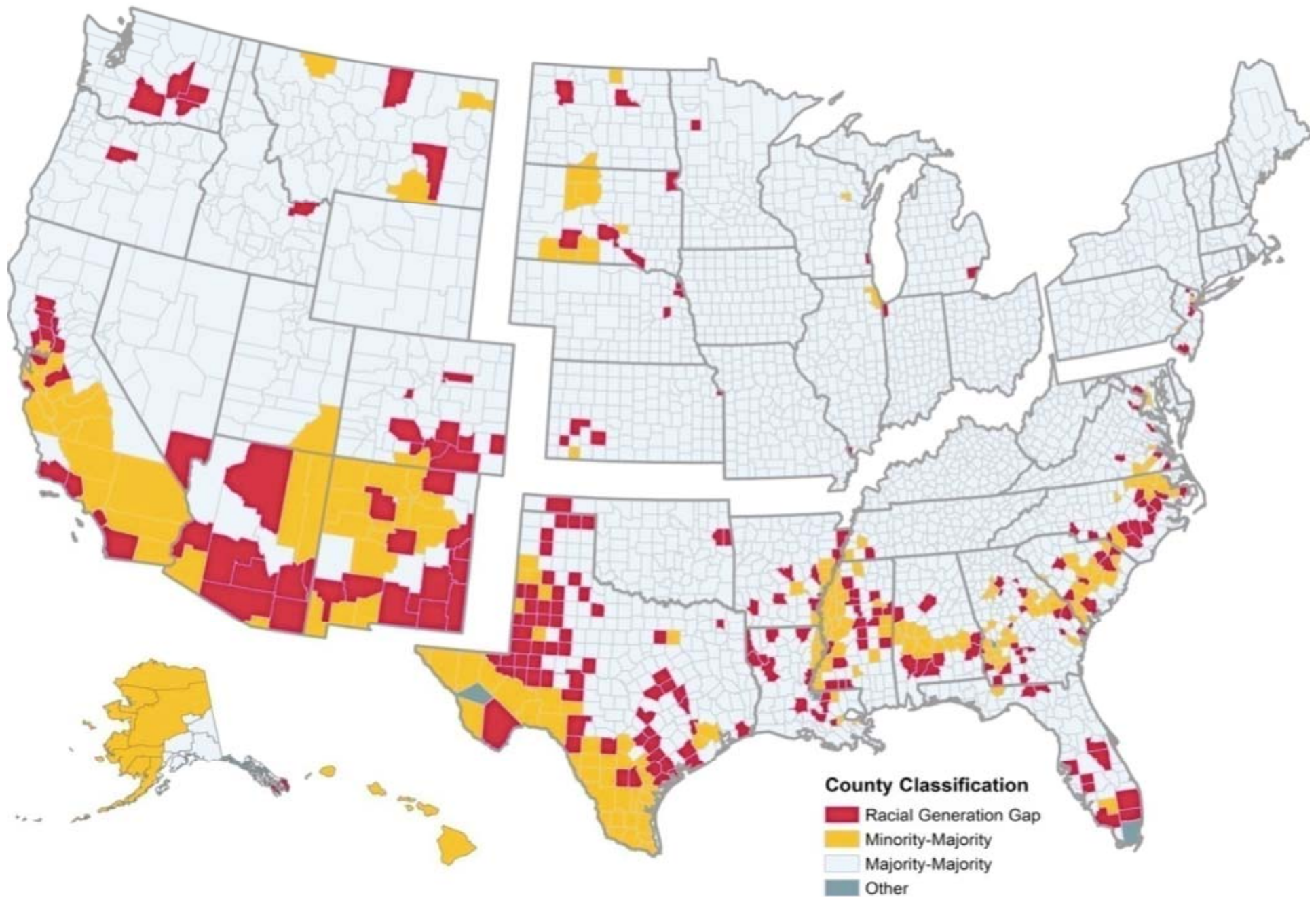
DIVERSITY RULES



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



A photograph of four students in a chemistry laboratory. They are wearing lab coats and have their hands raised in the air, smiling. 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 lab setting with white walls and equipment.

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
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Management	39.0
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Community & Social Services Occupations	36.1
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Installation, Maintenance & Repair Work	34.9
---	------

Production Occupations	33.4
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THE COMPETITIVE TOOL KIT

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

Moving Forward

- Manage the transition for the “greying” to the “browning” of America.
- Celebrate female-dominated labor force and leadership
- Embrace Immigrants.
- Improve Male Education Outcomes.
- Recognize the business development and job creation potential of diverse ethnic markets and elder care economy.

Immigrant Costs and Benefits

January 2006 



THE ECONOMIC IMPACT OF THE HISPANIC POPULATION
ON THE STATE OF NORTH CAROLINA

John D. Kasarda and James H. Johnson, Jr.
FRANK HAWKINS KENAN INSTITUTE OF PRIVATE ENTERPRISE

Kenan-Flagler Business School
THE UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL



**A Profile of Immigrants in Arkansas
Volume 2:
Impacts on the Arkansas Economy**

John D. Kasarda James H. Johnson Jr. Stephen J. Appold Derrek L. Croney



WINTHROP ROCKEFELLER FOUNDATION

A Profile
of Immigrants
in Arkansas

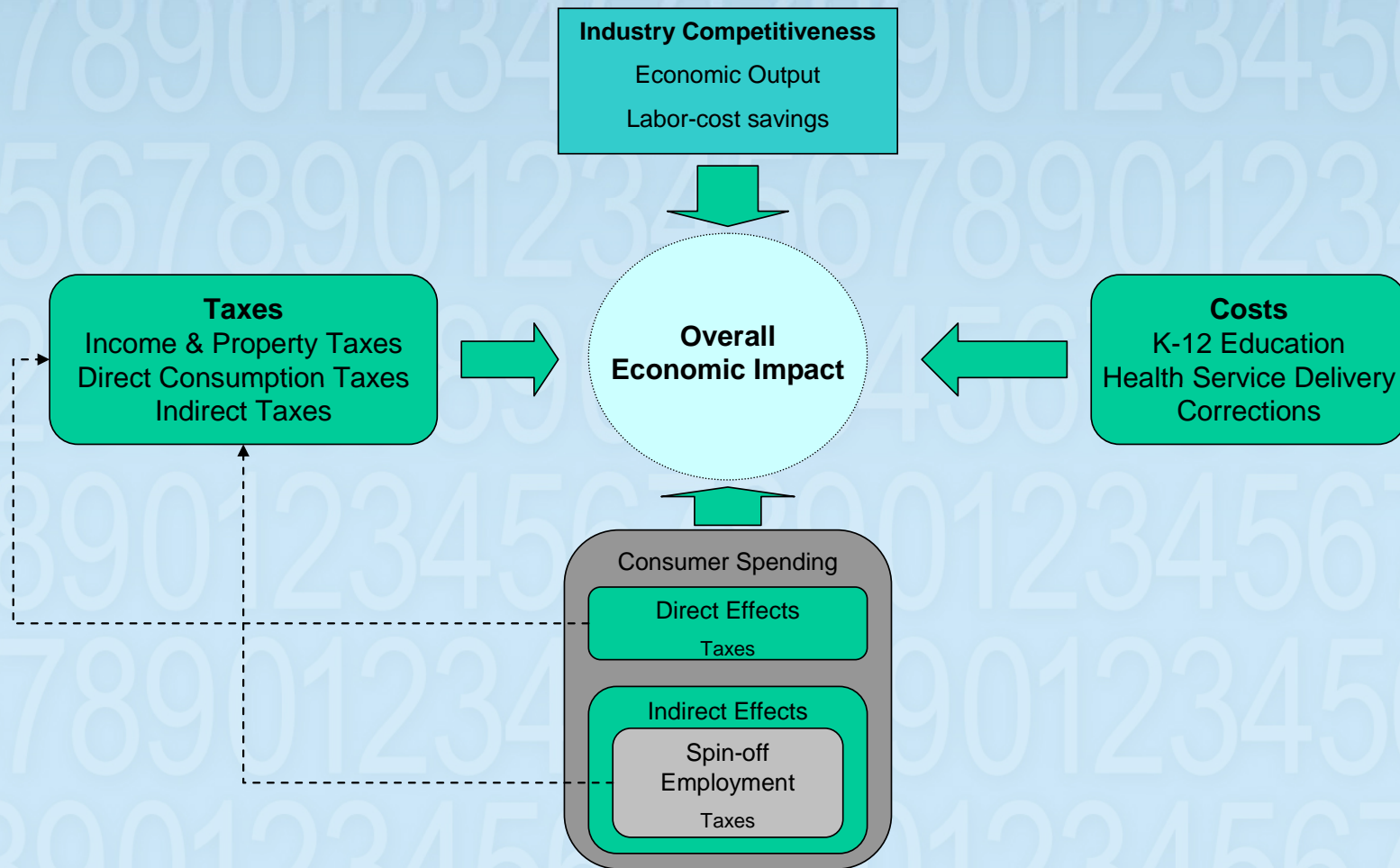
*Economic and Fiscal
Benefits and Costs*

VOLUME 2



COMMISSIONED BY THE WINTHROP ROCKEFELLER FOUNDATION
LITTLE ROCK, ARKANSAS

Conceptual Framework for Assessing the Economic Impact of Immigrants



Data and Methods

- Immigrant Buying Power (after-tax income)
- Reduced by 16 percent for remittances, savings, interest payments
- Input-Output Model to Generate Direct and Indirect Effects
 - Total Business Revenue
 - Spin-Off Jobs
 - State and Local Taxes
- Economic Output, Direct Taxes Paid, and Public Costs from Government Sources

Estimated Immigrant Economic Impact

Place	Buying Power	Economic Impact	Spin-Off Employment	Spin-off Labor Income	Spin-off State Taxes
North Carolina (2004)	\$8.3b	\$9.2b	89,600	\$2.4b	\$455m
Arkansas (2004)	\$2.7b	\$2.9b	23,100	\$618m	\$144m
Arkansas (2010)	\$4.3b	\$3.9b	36,100	\$1.3b	\$237m

Estimated Cost of Essential Services

Service	North Carolina 2004	Arkansas 2004	Arkansas 2010
K-12 Education	\$467m	\$186m	\$460m
Health Care	\$299m	\$38m	\$57m
Corrections	\$51m	\$15m	\$38m
Total	\$817m	\$237m	\$555m

Estimated Tax Contributions

Place	Direct	Indirect Business	Indirect Personal	Total
North Carolina (2004)	\$408m	\$222m	\$126m	\$756m
Arkansas (2004)	\$193m	\$47m	\$17m	\$257m
Arkansas (2010)	\$412m	\$74m	\$38m	\$524m

Estimated Net Fiscal Impact

Place	Cost of Essential Services	Tax Contributions	Net Impact on State Budget	Per-capita Impact
North Carolina (2004)	\$817m	\$756m	-\$61m	-\$102
Arkansas (2004)	\$237m	\$257m	+19m	+158
Arkansas (2010)	\$555m	\$524m	-\$31m	-\$127

SUMMARY RESULTS OF THREE ECONOMIC IMPACT STUDIES

Indicator	North Carolina Hispanics 2004	Arkansas Immigrants 2004	Arkansas Immigrants 2010
Consumer Expenditures & Tax Contributions	\$9.2b (\$15, 130)	\$2.9b (\$23,577)	\$3.9b (\$16,300)
Cost of Essential Services	\$817m (\$1,360)	\$237m (\$1,927)	\$555m (\$2,300)
Net Benefit	8.3b (\$13,770)	2.67b (\$21,951)	\$3.4b (\$13,900)
Benefit-Cost Ratio	\$10.00-\$1.00	\$11.00-\$1.00	\$6.00-\$1.00

Projected Changes in U.S. Buying Power by Race/Ethnicity, 2010-2015

Race/Ethnic Group	2010	2015	Projected Change
All Groups	\$11.1 trillion	\$14.1 trillion	27%
Hispanics	\$ 1.0 trillion	\$ 1.5 trillion	50%
Asians	\$ 544.0 billion	\$775.0 billion	42%
African Americans	\$ 957.0 billion	\$ 1.2 trillion	25%
Native Americans	\$ 67.7 billion	\$ 90.4 billion	34%

Value-Adds of Immigrants

- Boost economic growth & prosperity
- Fuel knowledge creation
- Contribute to innovation & technological progress
- Raise human capital levels & diversify business leadership
- Fill 3-D jobs
- Increase tax revenues

The Elder Care Economy

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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 END

