

# ASSET INVENTORY

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## ▶ What do we already have in place that can help us improve health?

An **Asset Inventory** is an important element of the state health assessment. The inventory is simply a list of a community's strengths, resources, supports, and capabilities that contribute to people's health and well-being. Instead of focusing on the community's problems, the asset inventory highlights those current assets that can be leveraged to promote community health.

The Mobilizing for Action through Planning and Partnerships (MAPP 2.0) framework, developed by the National Association of County and City Health Officials (NACCHO), defines an asset inventory as a tool for identifying the people, organizations, programs, services, partnerships, and physical resources that contribute to a community's well-being.

### **Community assets can include:**

- Local health departments, clinics, and hospitals
- Community organizations and coalitions
- Schools, universities, and early childhood programs
- Parks, greenways, and recreation centers
- Food assistance programs, transportation supports, or housing services
- Cultural groups, faith-based organizations, and trusted community leaders

Data systems, training programs, and other capacity-building resources. An asset inventory helps the community identify existing strengths that partners can use to address health priorities. The inventory helps ensure that planning is realistic, collaborative, and grounded in local capacity, expanding the focus from merely identifying gaps to also recognizing and leveraging opportunities.



## Historical Profile of North Carolina

North Carolina’s historical trajectory provides essential context for understanding the state’s contemporary demographic patterns, economic development, and persistent health disparities. From Indigenous stewardship through colonial settlement, industrial expansion, and modern population growth, the state’s past has profoundly shaped the conditions experienced by communities today.

### Indigenous Peoples and Early Colonial Development

For thousands of years, the region now known as North Carolina has been home to diverse Indigenous nations, including but not limited to the Catawba, Cherokee, Lumbee and Tuscorora. European colonization began in the late 1600s, primarily by English settlers migrating from Virginia. In 1729, North Carolina was established as a separate royal colony.

Agriculture anchored the colonial economy, with tobacco, naval stores, and later cotton driving growth. Enslaved African labor became central to this system. By 1860, about one-third of North Carolina’s population was enslaved (University of Maryland).

### Civil War and Reconstruction

North Carolina was the final state to secede from the Union, joining the Confederacy in May 1861 and ultimately contributing more troops to the Confederate Army than any other state. Despite having fewer large plantations than parts of the Deep South, the state experienced extensive wartime losses.

Reconstruction (1865 – 1877) created opportunities for political participation and expanded civil rights for Black North Carolinians, particularly in eastern counties. Unfortunately, these gains were later undone through racial suppression and violence.

In 1898, a coup in Wilmington overthrew the city’s multiracial government. Tragically, dozens of Black people were killed or displaced, marking the beginning of a sustained period of Jim Crow segregation and disenfranchisement.



### Industrialization and Urbanization (1900 – 1950)

During the early 20th century, North Carolina’s Piedmont region developed into a major industrial center, with Charlotte, Durham, Greensboro, and Winston-Salem emerging as national leaders in textiles, tobacco, and furniture manufacturing. Urbanization accelerated over the next half century, rising from approximately 10% of the population in 1900 to about 34% in 1950 (NCpedia, U.S. Census Bureau, 1950). Nevertheless, structural inequities remained, as Black workers continued to be excluded from higher-wage positions and many rural communities still faced historical gaps in sanitation, transportation, and public health infrastructure.



## Postwar Growth and Civil Rights (1950 – 2000)

The post–World War II era ushered in significant economic transformation for North Carolina. Although the state’s traditional industries began to decline, the finance, education, and research industries began a significant expansion. A noteworthy example of this mid-20<sup>th</sup>-century industrial expansion is Research Triangle Park (RTP) in central North Carolina. Created in 1959, RTP accelerated technological innovation and has attracted significant federal investment.

North Carolina played a visible role in the Civil Rights Movement, including the pivotal 1960 Greensboro sit-ins. Integration and voting rights were advanced by landmark federal legislation, notably the Civil Rights Act of 1964 and the Voting Rights Act of 1965. However, disparities in housing, schooling, income, and health outcomes persisted.

Meanwhile, by the 1980s and 1990s, Charlotte had become one of the nation’s leading banking centers in contrast to many rural and former manufacturing communities — particularly in tobacco and textile dependent counties — who simultaneously experienced economic decline and population loss.

## Population Growth and Demographic Change (1990 – Present)

Between 1990 and 2020, North Carolina’s population grew from about 6.7 million to more than 10.4 million, driven by both domestic migration and international immigration (Carolina Demography; Office of State Budget and Management, 2021). Growth was concentrated in metropolitan regions such as the city of Charlotte, the Research Triangle, and the Triad.

At the same time, the state experienced profound demographic diversification. North Carolina’s Hispanic/Latine population grew to about 10.7% by 2020 (NALEO Educational Fund, 2022), and Asian and multiracial populations also expanded. The foreign-born population reached around 9% in recent years, leading to an increase in linguistic and cultural diversity (Axios, 2024).

In addition to these demographic changes, North Carolina’s population is rapidly aging. As of 2023, approximately 17–18% of people were ages 65 or older, a significant increase from the much lower percentages at the turn of the century (America’s Health Rankings, 2023; Office of State Budget and Management, 2023). The rise in proportion of older populations is most pronounced in rural counties, with implications for the health care workforce, long-term services, and community infrastructure.

## THE DEMOGRAPHIC SHIFTS TO WATCH

Population growth, increased cultural diversity, and a rapidly aging population are reshaping the state’s workforce, health care needs, and community infrastructure.

*North Carolina Office of State Budget and Management, 2024; North Carolina Healthcare Association, 2024*

## Geographical and Infrastructural Profile of North Carolina

North Carolina's physical geography and infrastructure have a direct impact on population health, access to services, and economic opportunity. The state encompasses three distinct geographic regions: mountains, piedmont, and coastal plain. Each region is shaped by unique environmental conditions, distinct development patterns, and diverse transportation systems.

### Regional Geography

#### *Mountain Region (Western North Carolina)*

Home to the Blue Ridge and Great Smoky Mountains, is the most rural region of the state. It is characterized by low population density, limited public transit, and long travel distances to health care and social services. Topographic barriers further complicate infrastructure development and emergency response (NCpedia; NCDHHS Office of Rural Health, 2023; Arcury et al., 2005).

#### *Piedmont Region (Central North Carolina)*

The Piedmont is the most urbanized and economically developed region, encompassing North Carolina's five largest cities — Charlotte, Raleigh, Durham, Winston-Salem, and Greensboro. It contains the highest concentration of interstate highways, rail lines, and public transit systems, supporting both population growth and economic activity (NCpedia, North Carolina Department of Transportation (NCDOT), 2019, NCDOT, 2017).

#### *Coastal Plain (Eastern North Carolina)*

The Coastal Plain includes both inland agricultural areas and the Atlantic coastline. Its flat, low-lying terrain makes the region highly vulnerable to hurricanes, flooding, storm surge, and sea-level rise.

Many eastern counties continue to face limited access to health care and persistent infrastructure challenges (Geography of North Carolina, 2024; North Carolina Department of Environment and Natural Resources, 2014; U.S. Environmental Protection Agency, 2025).

### Transportation Infrastructure

#### *Roads*

The North Carolina Department of Transportation (NCDOT) maintains nearly 80,000 miles of public roads, which constitutes the second-largest state-maintained highway network in the U.S. (NCDOT, 2017). The state's population and economic centers are connected by several major interstate corridors (including I-26, I-40, I-73, I-74, I-85, and I-95). However, direct interstate access remains limited in many western and eastern counties, creating barriers to education, employment, and health care services (NCDOT, 2017).

#### *Public Transit*

Public transit services operate primarily in metropolitan areas and remain limited in rural regions.

- **Charlotte Area Transit System (CATS):** Offers extensive bus service and operates the state's only light rail line, the LYNX Blue Line (Charlotte Area Transit System; *Lynx Blue Line*, 2025).
- **GoTriangle:** Connects Raleigh, Durham, Chapel Hill, and surrounding communities through regional bus service and vanpool programs (GoTriangle; *GoTriangle*, 2024).
- **Other Cities:** Greensboro, Winston-Salem, Asheville, and Fayetteville maintain municipal bus systems with more limited service.

Overall, only about 1% of North Carolinians commute to work using public transit, far below the national average (Carolina Demography, 2015; King, 2023). According to national data, the national average is 5% (U.S. Census Bureau, 2021).



### Airports

North Carolina is served by four international airports and a network of regional airports.

- **Albert J. Ellis Airport (OAJ)**
- **Asheville Regional Airport (AVL)**
- **Charlotte Douglas International Airport (CLT)**
- **Coastal Carolina Regional Airport (EWN)**
- **Fayetteville Regional Airport (FAY)**
- **Piedmont Triad International Airport (GSO)**
- **Pitt-Greenville Airport (PGV)**
- **Raleigh-Durham International Airport (RDU)**
- **Wilmington International Airport (ILM)**

These airports, along with smaller general aviation facilities, make up North Carolina's extensive public airport system (Federal Aviation Administration).

### Rail

Amtrak provides intercity rail service through two primary routes:

- **Carolinian** (Charlotte–Raleigh–Rocky Mount–Northeast Corridor)
- **Piedmont** (Charlotte–Raleigh)

Rail service remains limited to select corridors and does not provide full statewide coverage (Amtrak; NCDOT).

## Broadband and Digital Infrastructure

Connectivity to high-speed internet is essential for accessing health care, education, employment, and civic participation. As of 2023, at least 1.1 million North Carolina households were on the underserved side of the digital divide and lacking either access, affordability, or the digital skills needed for full participation (Broadband USA, 2023; North Carolina Department of Information Technology, 2023).

The North Carolina Broadband Infrastructure Office leads statewide digital equity efforts. The Growing Rural Economies with Access to Technology (GREAT) Grant Program has been capitalized at approximately \$380 million, supporting last-mile broadband infrastructure expansion in underserved communities (North Carolina Department of Information Technology, 2024).

## Environmental and Geographic Barriers

Physical geography creates unique challenges for health care access, infrastructure resilience, and emergency response:

- **Mountain Terrain:** Limits hospital locations, increases travel distances for care, and complicates emergency response (Arcury et al., 2005).
- **Flood-Prone Eastern Regions:** Frequently impacted by hurricanes and inland flooding that disrupt transportation, power, and health services (North Carolina Department of Environment and Natural Resources, 2014).
- **Health Workforce Shortages:** Many rural counties in all three regions are federally designated Health Professional Shortage Areas (HPSAs), reflecting geographic isolation and provider scarcity (North Carolina Department of Health and Human Services Office of Rural Health, 2023; Health Resources and Services Administration).

## Cultural Profile of North Carolina

North Carolina’s cultural identity reflects the intersection of its geographic diversity, racial and ethnic composition, and longstanding public and private investment in the arts, heritage, and education. The state supports a rich cultural landscape that integrates Indigenous histories, longstanding regional traditions, a vibrant multilingual landscape, and the contributions of increasingly diverse populations.

### Multicultural Landscape

North Carolina has long served as a crossroads of cultures. Indigenous communities have lived in the region for thousands of years, and today the state recognizes eight tribes, including the Lumbee, Coharie, Haliwa-Saponi, Sappony, Waccamaw Siouan, Meherrin, Occaneechi Band of the Saponi Nation, and the Eastern Band of Cherokee Indians (North Carolina Commission of Indian Affairs). Two tribes have federal recognition (Eastern Band of Cherokee Indians and Lumbee Tribe of North Carolina).

Over the past several decades, North Carolina has experienced substantial racial and ethnic diversification. The Hispanic/Latine population grew from less than 2% of people in 1990 to more than 10% in 2020, making it one of the fastest-growing demographic groups in the state (U.S. Census Bureau, 1990; NALEO Educational Fund, 2022). Immigration from Latin America, Southeast Asia, Africa, and the Caribbean has contributed to growing linguistic, religious, and culinary diversity across communities (North Carolina Department of Commerce, 2022).

The majority of North Carolinians ages five and older (approximately 8.7 million people, or 88%) primarily speak English at home; however, this percentage varies by county. From 2018 to 2022, Duplin County had the lowest population percentage who spoke English at home, at 77%.

Spanish is the state’s second most spoken language at home, used by about 8% of the state’s population ages five and older. Duplin County has the highest proportion of Spanish speakers, at 21%.

In addition to English and Spanish, 13 other languages are each spoken by at least 10,000 North Carolinians ages five and over (Cline, 2024; OSBM).

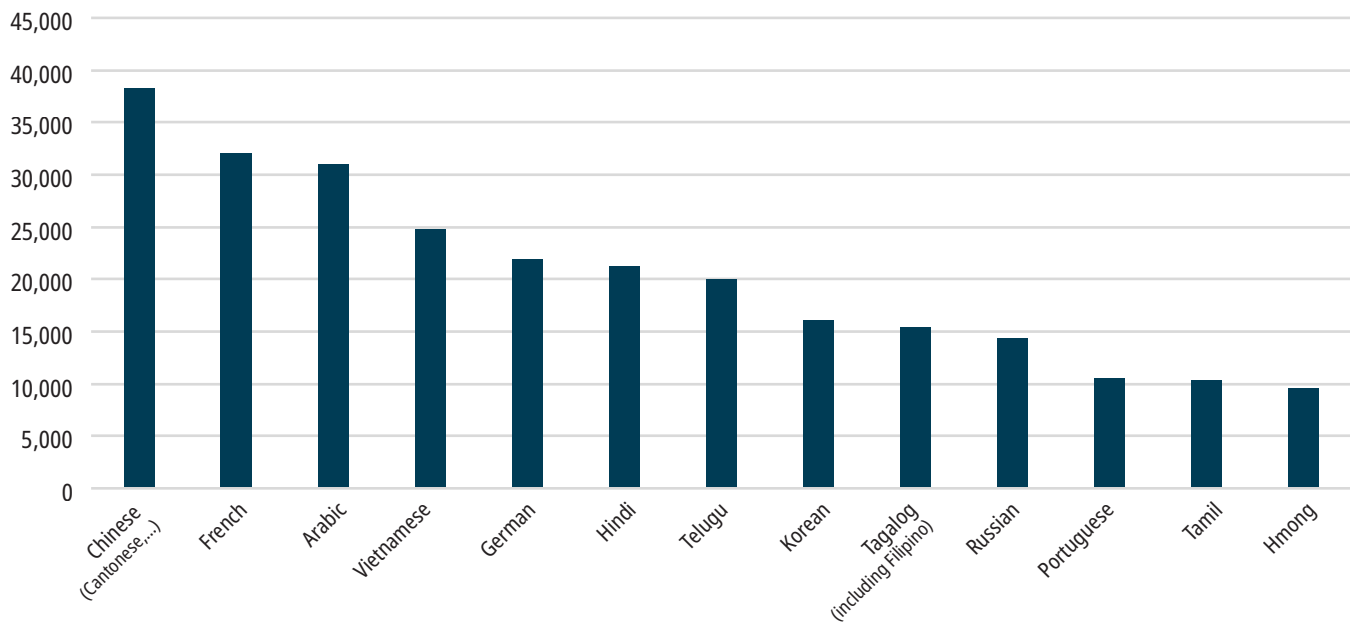
**Table 1. Language Spoken at Home in North Carolina (Population Ages 5+)**

Language	Population
English	8,700,000
Spanish	775,000
Chinese (Cantonese, Mandarin)	38,296
French	32,019
Arabic	30,931
Vietnamese	24,822
German	21,901
Hindi	21,244
Telugu	19,921
Korean	16,130
Tagalog (including Filipino)	15,442
Russian	14,390
Portuguese	10,498
Tamil	10,390
Hmong	9,508

*Source: U.S. Census Bureau, American Community Survey, 2018–2022.*



**Figure 2. Language Spoken at Home in North Carolina Other Than English or Spanish (Population Ages 5+)**



Source: US Census Bureau, American Community Survey, 2018-2022

To support cross-cultural engagement and strengthen community cohesion, many public institutions, community organizations and nonprofits have expanded culturally relevant programming including language access services, multicultural festivals and inclusive arts initiatives.

### Arts Infrastructure and Public Support

North Carolina has built a robust arts infrastructure with significant public investment. The North Carolina Arts Council, a division of the Department of Natural and Cultural Resources (DNCR), provides grants, training, and technical assistance to artists, schools, and nonprofit organizations in all 100 counties (North Carolina Arts Council). Since its establishment in 1967, the Council has supported traditional, folk, and contemporary arts while promoting access to cultural programming in both rural and urban communities.

DNCR also administers statewide cultural heritage programs and manages state historic sites, archives, and museum divisions that preserve North Carolina's history and elevate diverse narratives (North Carolina Department of Natural and Cultural Resources). Public higher education institutions — including members of the UNC System and the North Carolina Community College System — contribute to the cultural ecosystem through performing arts series, artist residencies, gallery exhibitions, and community events (University of North Carolina System; North Carolina Community College System).

Private foundations, local arts councils, and nonprofit organizations further support festivals, heritage programming, and arts education initiatives across the state.



## Museums and Cultural Institutions

North Carolina maintains a strong network of museums that reflects a wide range of disciplines:

- **North Carolina Museum of Art (Raleigh):** A leading regional art museum with a permanent collection and rotating exhibitions (North Carolina Museum of Art).
- **North Carolina Museum of History and North Carolina Museum of Natural Sciences (Raleigh):** Offer interactive exhibits and educational programs for families, students, and visitors (North Carolina Museum of History, North Carolina Museum of Natural Sciences).
- Regional museums such as the Mint Museum (Charlotte), Cameron Art Museum (Wilmington), and Reynolda House Museum of American Art (Winston-Salem) expand access to arts and cultural experiences statewide (Mint Museum, Cameron Art Museum, Reynolda House Museum of American Art).

These institutions are supported through a mix of state appropriations, philanthropy, and competitive grants, and many maintain partnerships with schools and universities to promote cultural literacy and lifelong learning.

## Festivals and Community Celebrations

Festivals across North Carolina highlight the state's artistic traditions and multicultural communities:

- **Arts and Music:** MerleFest in Wilkesboro, one of the country's premier Americana and roots music festivals (MerleFest); American Dance Festival in Durham (American Dance Festival); and LEAF Global Arts programming in programming in western North Carolina.
- **Cultural Heritage:** North Carolina Azalea Festival (Wilmington); American Indian Heritage Celebration (Raleigh); and the NC Folk Festival (Greensboro) (North Carolina Folklife Institute).
- **Seasonal and Agricultural:** North Carolina State Fair (Raleigh) and the Hendersonville Apple Festival (North Carolina State Fair).
- **Food and Drink:** Lexington Barbecue Festival; North Carolina Wine Festival (North Carolina Winegrowers Association).

Local governments, arts councils, and grassroots organizations further enrich cultural life by hosting multicultural celebrations, LGBTQ+ pride events, neighborhood parades, and community festivals throughout the year.





## Sports and Community Identity

### Youth Sports

Youth sports remain a cornerstone of community life. Local parks and recreation departments offer opportunities in soccer, basketball, baseball/softball, and other sports, supporting physical activity, teamwork, and youth development. The North Carolina High School Athletic Association (NCHSAA) provides statewide governance for interscholastic athletics (NCHSAA).

### Collegiate Athletics

North Carolina’s colleges and universities have a rich tradition of athletic participation across a wide range of intercollegiate conferences, reflecting the state’s long-standing commitment to collegiate sports and student-athlete excellence. Institutions across the state compete at the NCAA Division I, II, and III levels, with representation in nationally recognized conferences including the ACC, AAC, CAA, MEAC, Sun Belt, Big South, Conference Carolinas, CIAA, USA South, and ODAC (National Collegiate Athletic Association [NCAA], 2025).

### Professional Sports

North Carolina is home to several professional franchises, including:

- Carolina Panthers (NFL)
- Carolina Hurricanes (NHL)
- Charlotte Hornets (NBA)
- Charlotte FC (MLS)

Minor league baseball also has a strong presence, with teams such as the Durham Bulls, Asheville Tourists, and Winston-Salem Dash anchoring local sports culture (Minor League Baseball).



**Table 2. National Collegiate Athletic Association (NCAA)**

#### NCAA Division I

- Atlantic Coast Conference (ACC)
- American Athletic Conference (AAC)
- Coastal Athletic Association (CAA)
- Mid-Eastern Athletic Conference (MEAC)
- Sun Belt Conference
- Big South Conference

#### NCAA Division II

- Conference Carolinas
- Central Intercollegiate Athletic Association (CIAA)

#### NCAA Division III

- USA South Athletic Conference
- Old Dominion Athletic Conference (ODAC)

## Economic Profile

### of North Carolina

North Carolina's economy is dynamic and multifaceted, evolving from historical roots in agriculture and manufacturing to a modern landscape anchored by technology, health care, finance, clean energy, and advanced manufacturing. As the nation's ninth most populous state, North Carolina plays a significant role in the United States economy, leveraging strong population growth, a competitive business climate and ongoing investments in infrastructure and workforce development (U.S. Census Bureau, 2024).

North Carolina has one of the larger state economies in the country. In current dollars, the state's gross domestic product (GDP) grew from roughly \$600 billion in 2020 to about \$795 billion in 2023, reflecting substantial post-pandemic expansion (Federal Reserve Bank of St. Louis, 2024; Bureau of Economic Analysis, 2024). The state has repeatedly been recognized for its business climate. For example, CNBC named North Carolina "America's Top State for Business" in both 2022 and 2023, citing strengths in workforce, infrastructure and economic development strategy (CNBC, 2022, 2023; U.S. Bureau of Labor Statistics, 2022).

Labor market conditions remain relatively strong. The statewide unemployment rate has been holding in the mid 3% range — about 3.6% in 2024 — aligning closely with the national average and remaining near historic lows (Bureau of Labor Statistics [BLS], 2024; High Point Office of Budget and Evaluation, 2025). At the same time, the state's households continue to struggle with expenses following the sharp run-up in prices during 2021–2022. Although inflation has recently eased, elevated costs for housing, transportation, and other essential goods and services continue to strain household budgets (Census Bureau data summarized in Timiraos, 2025).

## Major Employment Sectors

North Carolina's employment base is broadly diversified, spanning management, health care, education, manufacturing, services and technology sectors. May 2023 Occupational Employment and Wage Statistics reported an approximate state total of 4.8 million jobs across all occupations, including the following:

**291,430** (6.1%)

MANAGEMENT OCCUPATIONS

**263,540** (5.5%)

BUSINESS AND FINANCIAL OCCUPATIONS

**171,450** (3.6%)

COMPUTER AND MATHEMATICAL OCCUPATIONS

**79,640** (1.7%)

ARCHITECTURE AND ENGINEERING OCCUPATIONS

**268,890** (5.6%)

HEALTH CARE PRACTITIONERS AND TECHNICAL OCCUPATIONS

**263,050** (5.5%)

EDUCATION, TRAINING AND LIBRARY OCCUPATIONS

**474,970** (9.9%)

SALES AND RELATED OCCUPATIONS

**655,540** (13.7%)

OFFICE AND ADMINISTRATIVE SUPPORT OCCUPATIONS

**444,760** (9.3%)

PRODUCTION OCCUPATIONS

*(BLS, 2024; Economic Policy Institute, 2024).*



These data underscore the importance of traditional sectors such as production and office support, as well as the expanding footprint of knowledge-intensive occupations in business, technology and health care sectors.

## Regional Disparities and the County Tier System

Economic conditions vary markedly across North Carolina's regions. The state's six most metropolitan counties (Wake, Mecklenburg, Guilford, Durham, Forsyth and Buncombe) all benefit from diversified economies, strong job growth, higher average incomes and robust infrastructure. In contrast, many rural counties, particularly in eastern and far-western North Carolina, face higher poverty rates, slower job growth, and more limited employment opportunities, reflecting and reinforcing persistent disparities in health, education, and access to services (North Carolina Department of Commerce, 2024; International Monetary Fund, 2025).

Each year, the North Carolina Department of Commerce employs a statutory three-tier system to classify all 100 counties and direct economic development investment. Counties are ranked based on four indicators: average unemployment rate, median household income, population growth, and per capita property tax base. Rankings are then used to assign each county to one of three tiers:

**TIER 1:** 40 most economically distressed counties

**TIER 2:** The next 40 counties

**TIER 3:** 20 least distressed (most prosperous) counties

The three-tier system is used to target incentive programs toward Tier 1 and Tier 2 counties seeking to attract and retain employers. Program incentives include Job Development Investment Grants and other supports (North Carolina Department of Commerce, 2024; International Monetary Fund, 2025). Critics note that the system may not fully capture within-county disparities or rapidly changing local conditions, yet the three-tier system remains central to North Carolina's strategy for promoting more balanced regional growth.

## Labor Force and Employment Trends

North Carolina's labor market has largely recovered from the COVID-19 downturn. However, disparities persist. Unemployment and underemployment rates remain higher for Black, Latine, and Indigenous workers than among white workers, reflecting long-standing inequities in access to education, transportation, child care and professional networks (North Carolina Justice Center, 2023; myFutureNC, 2025; World Population Review, 2025).

People living in rural areas, especially in counties with limited public transit or broadband access, may face additional barriers to stable employment and career advancement. These include longer commutes, fewer local job openings and limited access to training programs that require reliable internet.

## Key Industries and Emerging Sectors

North Carolina has cultivated competitive advantages across several high-growth industries:

### *Biotechnology and Life Sciences*

North Carolina is an established, national leader in life sciences and is anchored by Research Triangle Park (RTP), the largest research park in the United States. Recent estimates indicate more than 800 life sciences companies, employing 70,000–75,000 workers and demonstrating a strong growth trend since 2018 (Economic Development Partnership of North Carolina, 2024, 2025; Edgeton, 2025). New investments in biomanufacturing and pharmaceutical production continue to expand this sector.

### *Advanced Manufacturing*

The state has transitioned from traditional textiles and furniture manufacturing to aerospace, automotive, pharmaceuticals, and precision machinery industries, leveraging logistics assets and a skilled manufacturing workforce (North Carolina Department of Commerce, 2024; International Monetary Fund, 2025).



### **Finance and Financial Technology (FinTech)**

Charlotte is widely recognized as one of the nation's leading banking centers, home to major institutions such as Bank of America and Truist and an emerging hub for digital financial services (Economic Development Partnership of North Carolina, 2024; International Monetary Fund, 2025; TAC Economics, 2025; Tok & Heng, 2022).

### **Information Technology**

Firms specializing in cloud computing, data analytics, cybersecurity, and software development have increasingly located in the Triangle, Charlotte, and other metropolitan areas, drawn by proximity to research universities and a growing technology workforce (Economic Development Partnership of North Carolina, 2024; TAC Economics, 2025).

### **Clean Energy and Climate Technology**

North Carolina is a major solar energy state. In 2023, it ranked fourth nationally in installed solar generating capacity, with about 6,600 megawatts of capacity and roughly 10% of the state's electricity coming from solar energy (U.S. Energy Information Administration [EIA], 2024, 2025; Solar Energy Industries Association [SEIA], 2024). State policy and private investment are also advancing offshore-wind planning, energy storage, and grid modernization.

These industries offer opportunities for high-wage employment but often require postsecondary credentials or specialized skills, making alignment of education and workforce systems critical to ensuring equitable access to these jobs.

## **Income, Wages, and Cost of Living**

In 2023, North Carolina's median household income was \$69,904, which is below the national median (Data USA; U.S. Census Bureau, 2024). Income inequality is pronounced across geographic and demographic groups, with higher earnings concentrated in fast-growing metropolitan counties and among individuals with four-year degrees or higher.

Housing affordability is one of the most acute pressures on household budgets. Statewide data indicate that nearly half of renter households are cost-burdened, spending 30% or more of their income on housing, and renter cost burden has remained near 50% for much of the past decade (North Carolina Department of Commerce, 2025; North Carolina Housing Coalition, 2025). Severe cost burden — spending more than 50% of income on housing — is especially common among extremely low-income renters (National Low Income Housing Coalition; Smith, 2025).

The cost of living varies widely. Urban areas such as Raleigh, Charlotte, and Asheville have seen rapid increases in home prices and rents, while many rural communities struggle with stagnant wages, aging housing stock, and limited new construction (ncIMPACT Initiative, 2024). These patterns translate directly into disparities in health, educational opportunity and economic mobility.

# \$69,904

## Median Household Income

### Nearly Half of Renters Cost-Burdened

In 2023, the statewide median household income was \$69,904, below the national median. Nearly one in two renter households spends 30% or more of income on housing, underscoring widespread affordability challenges.

North Carolina | Data USA



## Business Environment and Economic Development

Multiple national rankings place North Carolina among the top states for business climate. CNBC named North Carolina America's Top State for Business in 2022 and 2023, citing strengths in workforce, education, infrastructure, and access to capital (CNBC, 2022, 2023; U.S. Bureau of Labor Statistics, 2022). The state's economic development strategy leverages:

- / 01 Targeted incentive programs to support industry relocation and expansion
- / 02 Rural economic development initiatives, including site-readiness and main-street revitalization
- / 03 Support for small businesses and entrepreneurship, often in partnership with community colleges, regional councils of government, and local chambers of commerce

Despite this strong macro-level environment, stakeholders in tribal communities, historically Black neighborhoods, and rural areas frequently point to underinvestment in broadband, industrial sites, and small business capital, which can limit the reach of statewide growth.

## Workforce Development and Education Alignment

North Carolina has set postsecondary attainment and workforce alignment as a central policy priority. The statewide myFutureNC goal is for two million North Carolinians ages 25–44 to hold a high-quality degree or credential by 2030 (myFutureNC).

According to the 2025 myFutureNC Educational Attainment Report, about 1.19 million adults ages 25 to 44, roughly 42% of that age group, have not yet earned a postsecondary degree or credential. This group includes hundreds of thousands of adults with “some college” experience or “no degree”

(myFutureNC, 2025). Closing this attainment gap presents challenges for both employers and communities, particularly as many of the fastest-growing jobs require education beyond high school.

**To address these gaps, the state is investing in:**

- K–12 to college pathways, including dual-enrollment and Career & College Promise
- Community college programs aligned with key industries (e.g., life sciences, advanced manufacturing, information technology and clean energy)
- Adult learner initiatives such as NC Reconnect, which help adults with some college but no credential return to school and complete their education (myFutureNC, 2024, 2025).

## Regional and Racial Disparities

Economic health in North Carolina continues to vary by region and race. Urban regions like the Research Triangle, Charlotte, and the Triad, have experienced the greatest benefits from recent job announcements, while many rural counties in eastern and western North Carolina continue to face persistent poverty, an aging population, and ongoing out-migration (Bhatt, 2025; ncIMPACT Initiative, 2024; North Carolina Department of Commerce, 2024; International Monetary Fund, 2025).

Communities of color, particularly Black and Latine people, are more likely to experience lower wages, higher unemployment, lower homeownership rates, and greater exposure to housing cost burden (Childress, 2025; NC Budget & Tax Center, 2025; North Carolina Housing Coalition, 2025). These patterns reflect long-standing structural racism, segregation, and disinvestment, underscoring the need for intentional, place-based strategies that pair economic development investments with efforts to expand affordable housing, quality education, and asset-building opportunities.

## Military Profile of North Carolina



North Carolina's military presence is a defining feature of its economic, social, and workforce landscape. As home to some of the nation's largest and most strategically important installations, the state plays a critical role in national defense while benefiting from substantial economic activity generated by service members, veterans, military families, and defense-related industries (Our NC Military).

North Carolina hosts a wide array of Army, Marine Corps, Air Force, and Coast Guard facilities that support training, aviation, logistics, special operations, and coastal security. These installations anchor local economies, attract defense contractors, and contribute to a robust pipeline of skilled workers transitioning into civilian careers, supporting approximately 11% of statewide employment (Our NC Military, North Carolina Military Affairs Commission, 2022).

### Major Military Installations

**Fort Bragg (Cumberland County).** Formerly known as Fort Liberty, Fort Bragg is the largest U.S. military installation by population, with more than 50,000 active-duty personnel and over 14,000 civilian employees. The installation is home to the 82nd Airborne, XVIII Airborne Corps, and the U.S. Army Special Operations Command, among other elite units (North Carolina Department of Military & Veterans Affairs).

**Marine Corps Base Camp Lejeune (Onslow County)** is the largest Marine Corps installation on the East Coast, spanning over 150,000 acres, including 14 miles of Atlantic coastline. Camp Lejeune serves as the headquarters for Marine Corps Installations East (MCIEAST) (Marine Corps Installations East; Headquarters and Support Battalion).

**Marine Corps Air Station (MCAS) New River (Onslow County)** hosts approximately 7,000 active-duty personnel and 1,000 civilian employees, supporting Marine aviation and helicopter operations (North Carolina Department of Military and Veterans Affairs).

**Marine Corps Air Station (MCAS) Cherry Point (Craven County)** employs roughly 6,000 active-duty personnel and 5,400 civilian workers. Among Cherry Point's major tenants is the Fleet Readiness Center (FRC) East, which performs aircraft maintenance for the Marine Corps and other military services (Military OneSource, 2024; Military OneSource).

**Seymour Johnson Air Force Base (Wayne County)** supports the 4th Fighter Wing and employs approximately 4,100 active-duty service members and 1,000 civilian staff (MilitaryINSTALLATIONS; Military OneSource, 2024).

**U.S. Coast Guard Air Station Elizabeth City (Pasquotank County)** is one of the nation's largest Coast Guard aviation facilities, supporting mid-Atlantic and offshore missions (MyBaseGuide, 2025; U.S. Coast Guard, 2024; United States Coast Guard).

Together, these installations form a statewide network of military readiness, training, aviation support, and coastal defense.



## Statewide Military and Defense Impact

Defense is North Carolina's second-largest economic sector, generating approximately \$66 billion annually (Our NC Military). The defense industry supports about 11% of statewide employment, equal to roughly 653,000 jobs when accounting for active-duty service members, civilian employees, contractors, and indirect economic activity (Our NC Military; North Carolina Military Affairs Commission, 2022).

Military installations also anchor local economies. Camp Lejeune alone generates nearly \$3.6 billion in annual economic activity for the Jacksonville region (Marine Corps Installations East, 2023). Defense procurement, construction, logistics, aerospace manufacturing, and information technology services further amplify the economic contributions of these installations, particularly in Cumberland, Onslow, Craven, and Wayne counties (Our NC Military).

## Transitioning Service Members and Workforce Development

Each year, approximately 20,000 North Carolina service members transition out of the military, providing a steady influx of experienced workers with skills in logistics, aviation, cybersecurity, health care, and operations management (Our NC Military). Although veterans contribute to a highly capable labor force, they may experience challenges related to credential transferability, housing affordability, and gaps in behavioral health services (National Veterans Homeless Support).

## Veterans and Military Families

North Carolina is home to one of the nation's largest veteran populations. In 2024, the state had over 620,000 non-active-duty veterans, comprising a substantial segment of the state's civilian labor force. Veterans ages 35 to 64 account for the highest number of employed veterans (approximately 125,880), but this same group also comprises the largest number of unemployed veterans (Carolina Demography, 2025).

The national Veterans Health Administration (VHA) meets the health care needs of the country's veteran population through 18 regional networks known as Veterans Integrated Service Networks (VISNs). VISN 06, also called the VA Mid-Atlantic Health Care Network, provides services to veterans throughout North Carolina and parts of Virginia. The VISN structure is intended to deliver comprehensive health care to veterans while coordinating care with community providers (U.S. Department of Veterans Affairs, U.S. Department of Veterans Affairs, 2025).

Within VISN 06, there are seven VA medical centers (VAMCs), four of which are located in North Carolina: Asheville, Fayetteville, Salisbury, and Durham. Additional VHA facilities are distributed throughout North Carolina and parts of Virginia, including Community-Based Outpatient Clinics (CBOCs), Health Care Centers (HCCs), specialty clinics such as dialysis and rehabilitation centers, and Vet Centers offering mental health services (North Carolina Department of Military & Veterans Affairs; U.S. Department of Veterans Affairs).

## National Guard and Statewide Support Infrastructure

Military readiness is also supported by the North Carolina National Guard, along with additional training, research, and support facilities located across the state. These units provide domestic emergency response, aviation support, engineering services, and cybersecurity capabilities, playing a vital role during hurricanes, wildfires, floods, and other emergencies (National Guard Bureau, 2024; North Carolina National Guard).

## Educational Profile of North Carolina

North Carolina's education system spans a broad continuum from early childhood programs through higher education and adult learning. While the state is home to nationally recognized innovations and strong public institutions, persistent gaps in access, funding, and outcomes continue to shape educational opportunities, particularly for rural, low-wealth, and historically underserved communities.

### Early Childhood Education and Child Care

North Carolina has a longstanding commitment to early learning through both public and private programs, including North Carolina Pre-kindergarten Program (NC Pre-K), Smart Start, and Head Start/Early Head Start. Despite this infrastructure, access remains limited. As of 2023, licensed child care providers could accommodate only 18.7% of the state's infants and toddlers, with the most severe shortages occurring in rural counties (Child Care Association, 2022).

The average annual cost of infant care currently exceeds \$11,000, often surpassing in-state university tuition (Economic Policy Institute, 2023). Subsidies are available to working families earning up to 200% of the federal poverty level. In 2023 more than 60,000 children benefited from child care subsidies; however, thousands remain on waiting lists due to funding constraints (NCDHHS Division of Child Development and Early Education [DCDEE], 2023).

NC Pre-K provides free preschool for eligible four-year-olds, particularly children at risk of poor academic outcomes. Smart Start promotes early literacy, family engagement and child health through partnerships in all 100 counties. Head Start and Early Head Start extend comprehensive early learning and wraparound services to include low-income and migrant families (U.S. Administration for Children & Families, 2023).



### K–12 Education: Changing Models and Expanding Choice

North Carolina's K–12 landscape has undergone significant diversification. Traditional public schools continue to serve the majority of students (approximately 76%); however, charter schools, private schools, home schools and other alternative models are steadily expanding. These alternative models account for a growing share of the state's overall enrollment (North Carolina Department of Public Instruction [NCDPI], 2023). Charter school enrollment has grown sharply since the statewide cap was lifted in 2011 and home school enrollment surged during the COVID-19 pandemic.

In 2023, the Opportunity Scholarship program was expanded to include all families regardless of income, leading to an acceleration in private school enrollment and prompting questions regarding accountability, funding equity and statewide system coherence (NC State Education Assistance Authority, 2023). These structural shifts reflect a broader trend toward pluralism in educational delivery and have intensified discussions about resource allocation and student outcomes.



## Accelerated Pathways and High School Innovation

North Carolina is a national leader in early college and dual enrollment models. Through the Career & College Promise (CCP) initiative, high school students earn tuition-free college credit, thereby shortening the time required to complete a degree and reducing overall student debt. Cooperative Innovative High Schools (CIHS) — often located on community college campuses — target first-generation college students and those at risk of not completing high school. As of 2023, 134 CIHS programs were operating across the state (NCDPI, 2023).

### 134 Cooperative Innovative High Schools

North Carolina leads the nation in early college models, with high schools offering accelerated pathways.

## Postsecondary and Adult Education

North Carolina's higher education ecosystem includes:

- **The University of North Carolina System:** 16 public universities and the North Carolina Schools of Science and Mathematics with nearly 250,000 students enrolled systemwide (UNC System, 2023). Five of the 16 UNC institutions are historically black colleges and universities (HBCUs).
- **The North Carolina Community College System (NCCCS):** Fifty-eight colleges serving all 100 counties and providing academic transfer pathways, workforce credentials, basic skills programs and correctional education (NCCCS, 2023).
- **Private nonprofit colleges and universities:** Enrolling roughly 87,000 students, these institutions offer key contributions to research, liberal arts education and state workforce pipelines (NC Independent Colleges and Universities, 2023).

Programs such as NC Promise offer reduced tuition (\$500 per semester for in-state students) at select UNC institutions, improving affordability for thousands of students annually.

Adult education opportunities like high school equivalency, English language acquisition, and workforce upskilling are available through community colleges and partnerships with employers, libraries, and correctional facilities.

## Supporting Special Populations

The state of North Carolina administers several specialized programs to support equitable access:

- Migrant Education Program and McKinney-Vento Homeless Education Program provide tutoring, transportation and enrollment support for mobile and unhoused students.
- Youth in foster care benefit from school stability requirements, while juveniles in detention receive instruction through North Carolina Department of Public Safety programs (NC DPS, 2023).
- For incarcerated adults, 43 community colleges partner with prisons to deliver high school equivalency and career preparation, supporting reentry and reducing recidivism.

## Funding and Access Challenges

Funding inequities persist across North Carolina's public schools and are largely tied to property tax revenue. Wealthier districts supplement state education allocations to provide higher salaries, updated facilities, and expanded instructional supports, while low-wealth districts often struggle to meet basic needs.

The *Leandro v. State of North Carolina* case and its Comprehensive Remedial Plan highlight systemic inequities and outline reforms, including expanded early childhood education, strengthened instructional leadership, and targeted funding supports (WestEd, 2019; NC DPI, 2024; *Leandro v. State*, 488 S.E.2d 249 (N.C. 1997)). Federal Title I funds and state low-wealth appropriations mitigate some disparities but do not fully close persistent gaps.

## Digital Infrastructure and Workforce Challenges

The digital divide remains a barrier for rural and low-income communities. The NC Student Connect initiative, launched during the COVID-19 pandemic, expanded broadband access, devices, and hotspots to underserved students through public-private partnerships (North Carolina Department of Information Technology, 2023).

Staffing shortages, particularly in teaching, special education and school counseling, continue to constrain instructional quality. The TeachNC initiative seeks to strengthen educator pipelines through recruitment campaigns, licensure support, and targeted incentives for hard-to-staff subjects and high-need schools (TeachNC, 2024).

## Digital Access

The **NC Student Connect initiative** expanded broadband and device access during the pandemic, improving connectivity for underserved learners.

*North Carolina Department of Health and Human Services, 2023*

## Teacher Workforce

Teacher and counselor shortages continue to challenge school systems; **TeachNC** is helping rebuild educator pipelines statewide

*North Carolina Department of Health and Human Services, 2023*



## Health Care Profile of North Carolina

North Carolina's health care system is a diverse and evolving network serving more than 10 million people across urban, suburban and rural regions. Anchored by nationally recognized academic medical centers and a blend of public and private health care systems, North Carolina delivers high-quality, specialty care in metropolitan areas while confronting persistent disparities in access, affordability, and workforce capacity, particularly in rural and historically marginalized communities.



### Health Insurance Coverage and Medicaid Expansion

A transformative shift in North Carolina's health care landscape occurred on December 1, 2023, when the state expanded Medicaid eligibility to low-income adults for the first time. By early 2025, more than 630,000 people had enrolled through Medicaid expansion, significantly increasing access to primary, behavioral and preventive care (North Carolina Department of Health and Human Services [NCDHHS], 2025).

Before expansion, approximately 9.2% of North Carolinians — nearly one million people — lacked health insurance, a rate above the national average (U.S. Census Bureau, 2024). In 2023, 46.5% of the state's population obtained coverage through employer-

sponsored plans, with the remainder enrolled in Medicare, Medicaid, Marketplace plans or military/veterans' benefits (Kaiser Family Foundation, 2024).

Medicaid expansion is expected to reduce uncompensated care costs for hospitals, stabilize rural facilities, and narrow long-standing racial and geographic disparities in access to health care (NCDHHS, 2025; North Carolina Rural Health Research Program, 2024).

### Health Care Infrastructure and Provider Availability

North Carolina's health care infrastructure includes large academic and regional systems as well as dozens of independent community hospitals and Critical Access Hospitals (CAHs). Table 3 shows the largest health care system employers in North Carolina. While metropolitan areas support major tertiary and quaternary care centers, many rural hospitals face financial pressures, workforce shortages and limited-service lines (North Carolina Rural Health Research Program, 2024).

The NCDHHS Division of Health Service Regulation (DHSR) oversees licensure for hospitals, nursing and adult care homes, mental health facilities, ambulatory surgical centers and home health agencies, ensuring compliance with state and federal standards (NCDHHS, 2025). Many facilities pursue voluntary accreditation through The Joint Commission, the Accreditation Commission for Health Care (ACHC) or the Commission on Accreditation of Rehabilitation Facilities (CARF) to demonstrate their commitment to continuous quality improvement.

North Carolina also operates a Certificate of Need (CON) program to prevent unnecessary duplication of health services and promote efficient allocation of resources. Although critics contend that CON laws can restrict competition, recent legislative changes have eased requirements for certain outpatient services in high-growth markets (North Carolina General Assembly, 2023).

**Table 3. Largest Health Care System Employers in North Carolina**

Rank	Health Care System	Approximate Employees	Notes	In-text Citation
1	UNC Health	50,000+	Statewide public academic health system	(UNC Health)
2	Atrium Health (Advocate Health – NC operations)	30,000–35,000	NC operations only	(Atrium Health)
3	Novant Health	~30,000	Operates primarily in NC and Southeast	(Novant Health)
4	Duke University Health System	25,000–27,000	Health system only	(Duke Health)
5	ECU Health	~12,000	Regional system serving eastern NC	(ECU Health)
6	Cone Health	~13,000	Regional system serving the Triad	(Cone Health)
7	Mission Health (HCA Healthcare – Western NC)	10,000–12,000	Systemwide NC workforce	(HCA Healthcare)
8	WakeMed Health & Hospitals	8,000–9,000	Wake County/Raleigh region	(WakeMed)
9	CaroMont Health	5,000+	Gaston County region	(CaroMont Health)
10	FirstHealth of the Carolinas	5,000+	Sandhills region	(FirstHealth of the Carolinas)

*Note: Employee counts are reported by each health system on its official fact sheet, annual report, or “About” organizational profile page (or, where noted, a reputable nonprofit profile summarizing the organization’s disclosures). Health systems vary in how they define and report their “workforce” (e.g., “employees” vs. “team members/teammates,” inclusion of part-time staff, employed clinicians, affiliates, and multi-state operations). To support comparability, figures are presented as reported by the source and should be interpreted as approximations of workforce size. Counts were accessed on January 11, 2026.*

Emergency Medical Services (EMS) operate across all 100 counties through county-based, hospital-based, and contracted models. Staffing shortages, especially in rural counties, have prompted the expansion of community paramedicine, enabling EMS personnel to provide in-home preventive and transitional care (North Carolina Office of EMS, 2024).

## Workforce and Specialty Care Access

Persistent workforce shortages affect nearly every aspect of North Carolina’s health care delivery system. Over half the state’s counties are designated Health Professional Shortage Areas (HPSAs) for primary care, dental care, or behavioral health — often due to geographic isolation, aging populations, and limited provider recruitment pipelines (Health Resources and Services Administration, 2024).

Consistent access across North Carolina to quality and affordable dental care is strained and varies significantly by market. At the same time, the dental workforce has grown rapidly; a recent 10-year analysis (2014–2024) found that the number of dentists per 100,000 North Carolina residents increased faster than in any other state (J. Goodman, NC Dental Society, personal communication). While private practitioners provide more than 80% of the North Carolina’s dental services, their statewide distribution is uneven: over half of all dentists practice in just six counties, and several rural counties have no practicing dentist (North Carolina Oral Health Collaborative, 2024). With Medicaid expansion including adult dental benefits, demand for safety net dental care is projected to grow substantially.

Stagnant Medicaid reimbursement (unchanged since 2008) is the primary driver of participation decline and access barriers – not dentist supply.



## Mental and Behavioral Health

Mental and behavioral health needs rank among the state's most pressing challenges. Nearly one in five adults reports experiencing mental health symptoms, and 97 of North Carolina's 100 counties are classified as mental health HPSAs (Health Resources and Services Administration, 2024). The state ranks 39th nationally in access to mental health care (Mental Health America, 2024).

In response, North Carolina is implementing major system reforms, including:

- \$835 million investment in crisis services, facilities, and behavioral health workforce development (NCDHHS, 2024)
- Expansion of the 988 Suicide & Crisis Lifeline
- Mobile crisis teams and telepsychiatry
- Integration of behavioral health into Medicaid tailored plans

These strategies aim to strengthen crisis response systems, expand treatment capacity, and reduce avoidable hospitalizations, particularly in rural communities.

## Safety Net and Community-Based Care

North Carolina's safety net infrastructure includes:

- **Federally Qualified Health Centers (FQHCs):** Served around 750,000 patients in 2023, many uninsured or living in poverty (North Carolina Community Health Center Association, 2024).
- **Free and Charitable Clinics:** Provided more than 200,000 patient visits to over 80,000 individuals in 2023 (North Carolina Association of Free & Charitable Clinics, 2024).
- **Local Health Departments:** Deliver services in all 100 counties, including clinical services, maternal and child health programs, immunizations, disease surveillance, and environmental health services.
- **School-Based Health Centers:** Expand access to youth-centered care, especially in rural and low-income communities.

## \$835 MILLION

North Carolina is investing \$835 million in crisis services, treatment capacity and the behavioral health workforce.

*North Carolina Department of Health and Human Services, 2023*

These organizations provide integrated medical, dental, behavioral health, pharmacy, and enabling services, including case management, interpretation and transportation.

## State-Operated Facilities

The NCDHHS Division of State Operated Healthcare Facilities (DSOHF) provides specialized inpatient and residential care for individuals with significant behavioral health, developmental or chronic health needs. State-operated facilities include:

- Three psychiatric hospitals
- Three developmental centers
- Two neuro-medical centers
- Additional programs serving children, adults with intellectual/developmental disabilities, and individuals recovering from substance use disorders (NCDHHS, 2025).

These facilities represent the most intensive service settings in the state's continuum of care.

## Overall Outlook

North Carolina's health care system is undergoing a period of accelerated transformation. Medicaid expansion, behavioral health investments, digital connectivity improvements and efforts to rebuild the health workforce signal meaningful progress toward a more equitable and resilient system. However, persistent disparities — across geography, race, disability, and income — underscore the importance of sustained investment and policy coordination.