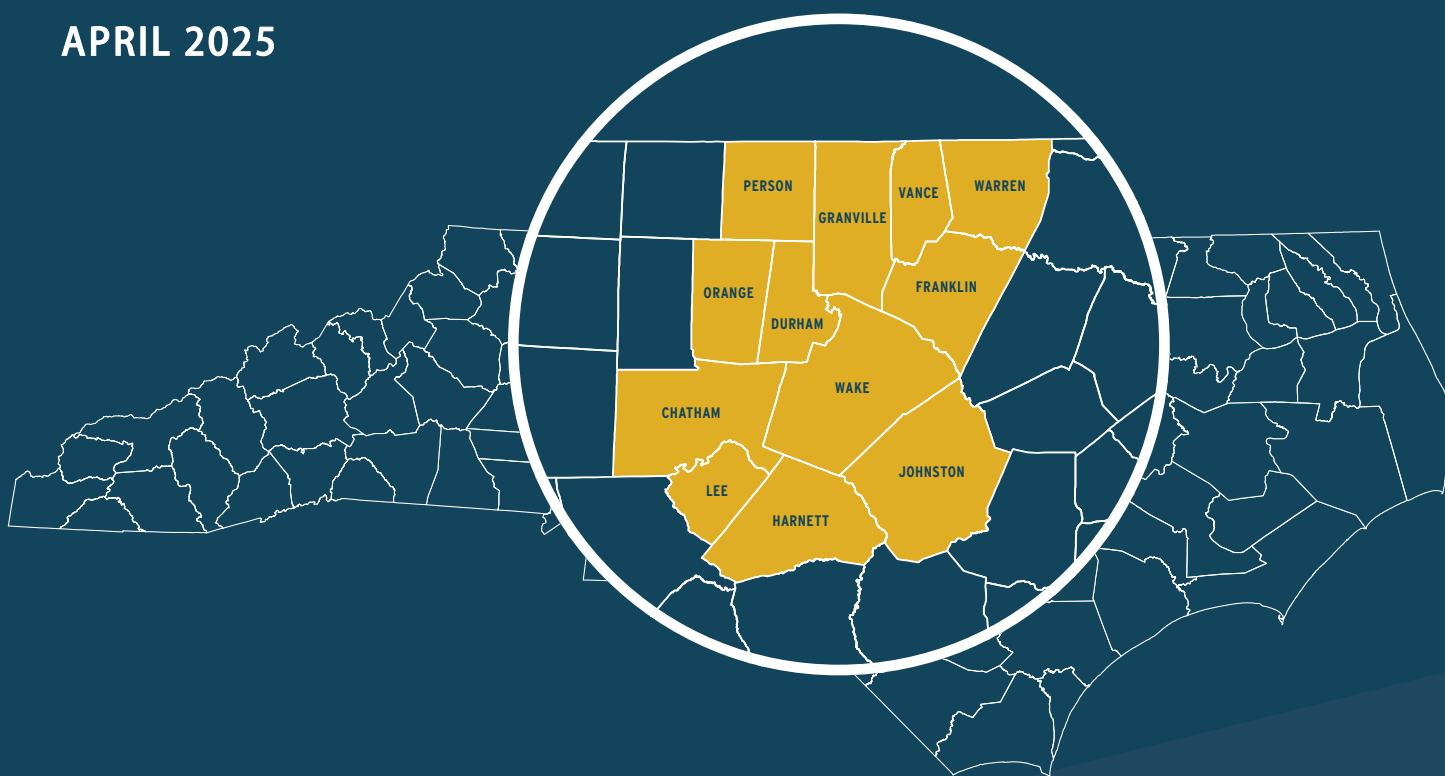# North Carolina Community College System

2025 Raleigh-Durham Region Labor Market Analysis Report

APRIL 2025

Raleigh-Durham Region Counties
Chatham · Durham · Franklin · Granville · Harnett · Johnston · Lee · Orange · Person · Vance · Wake · Warren

NC Community Colleges serving the Raleigh-Durham Region
Central Carolina CC · Durham TCC · Johnston CC · Piedmont CC · Vance-Granville CC · Wake TCC

NC DEPARTMENT *of* COMMERCE LABOR & ECONOMIC ANALYSIS

ECONOMIC DEVELOPMENT PARTNERSHIP *of* NORTH CAROLINA

NC Community COLLEGES CREATING SUCCESS

Introduction

This report is designed to help stakeholders understand the current and future labor market within their region. It is also a tool for North Carolina community colleges as they consider programmatic changes that align with the labor market and identify potential opportunities for programmatic collaboration with other colleges in the region. This report specifically provides regional insights into:

- Recent trends associated with overall employment at the region and county levels

- Current regional diversity of industry sectors and occupational groups

- Projected regional changes across industry sectors and occupational groups

- Regional projections for annual openings in occupations requiring or preferring a community college education and their associated earnings

- Annual count of regional community college completers by program and their associated earnings

- Comparison of occupational openings and community college completers by PropelNC Workforce Sector

- Recent economic development activity

Region

North Carolina's 100 counties are organized into eight multi-county economic regions called Prosperity Zones, which are further divided into sixteen Sub Prosperity Zones. The Raleigh-Durham region is one of two subzones of the North Central region, encompassing the following counties: Chatham, Durham, Franklin, Granville, Harnett, Johnston, Lee, Orange, Person, Vance, Wake, and Warren.

Highlights

Employment (Pages 4-5)

- The region grew employment by 12.5% between 2018 and 2023, resulting in 1,140,992 workers in 2023.

- 7 of 12 counties in the region saw growth in employment across the 6-year period.

- The regional unemployment rate was 3.1% in 2023, below the statewide rate (3.5%).

- All counties showed a net decrease in unemployment rates across the 6-year period. In 2023, unemployment rates ranged from 2.9%-5.4%.

Existing Industry Sectors and Occupational Groups (Pages 6-7)

- In 2022, the four largest industry sectors in the region were Health Care and Social Assistance, Professional, Scientific, and Technical Services, Educational Services, and Retail Trade.

- In 2022, the four largest occupational groups in the region were Office and Administrative Support, Sales and Related, Management, and Transportation and Material Moving.

Labor Supply and Demand (Page 8)

- During the COVID-19 pandemic, there was an oversupply of job seekers relative to job openings. In every year since (through 2023), job openings have outpaced labor.

- In 2023, Architecture and Engineering Occupations and Healthcare Support Occupations had significantly more jobs than job seekers (ratio: 0.2), whereas Life, Physical, and Social Science Occupations had about twice as many job seekers as available jobs (ratio: 2.3).

Employment Projections (Pages 9-10)

- The region is projected to add 147,718 jobs between 2022 and 2032. The Healthcare and Social Assistance sector will experience the largest growth (+28,302), and the Arts, Entertainment, and Recreation sector will have the largest percent growth (25.3%).

- Across the 10-year period, the Healthcare Practitioners and Technical Occupations group will experience the largest growth (+16,595), and this sector, along with the Healthcare Support Occupations group, will have the fastest percent growth (20.5%).

Focused Occupational Projections (Pages 11-12)

- Between 2022 and 2032, it is projected that Home Health and Personal Care Aides and Registered Nurses will be the two occupations with the highest number of annual openings in the region.

- Within the region, median annual earnings among the top twenty-five occupations range from $30,708 (Teaching Assistants, Except Postsecondary) to $107,622 (Project Manager Specialists).

Community College Completers and Earnings (Page 13)

- In the 2023-2024 academic year, the Nursing Assistant/Aide and Patient Care Assistant/Aide and Information Technology pathways produced the most completers (931 and 919, respectively).

- The Registered Nursing/Registered Nurse completers had the highest average median salary ($79,932).

PropelNC Workforce Sector Occupation Projections and Community College Completers (Page 14)

- Using projections for 2032, the PropelNC-aligned workforce sectors with the largest number of openings in the Raleigh-Durham region were Trades and Transportation (29.0%) and Business and Management (26.1%).

- In comparison, based on completions in the 2023-2024 academic year, the PropelNC-aligned workforce sectors with the largest number of completers included Business and Management (16.3%) and Public Safety and First Responders (14.9%).

Economic Development Projects (Page 15-16)

- Between 2019 and 2024, 225 economic development projects were reported across the region, adding a total of 42,089 jobs and $27.6 billion in capital investment.

- Across the six-year period, the Biotechnology, Pharmaceuticals and Life Sciences sector saw the largest growth in jobs (11,750 new positions) and the greatest investment ($14.7 billion).

- The announced projects included 44 foreign direct investments from 18 different countries, including the United Kingdom (6 projects) and Japan (12 projects).

Appendix (Page 17-22)

- Technical Documentation

- Detailed Data Tables

- Acknowledgements

Employment

Employment Trends

Data from the Quarterly Census of Employment and Wages shows that the Raleigh-Durham region experienced a 12.5% increase in employment between 2018 and 2023, resulting in 1,140,992 workers in 2023. After reducing the workforce by over 31,000 individuals during the COVID-19 pandemic, the region quickly recovered and experienced a net gain of 127,034 workers since 2018. Compared to state trends, the Raleigh-Durham region lost a lower percentage of their workforce during the pandemic (-3.9% statewide compared to -3.0% regionally) and recovered at a faster rate (2.8% growth statewide in 2022-2023 compared to 3.0% regionally). Figure 1 compares statewide and regional employment from 2018 to 2023.

Figure 1. Statewide and regional employment statistics from 2018-2023.
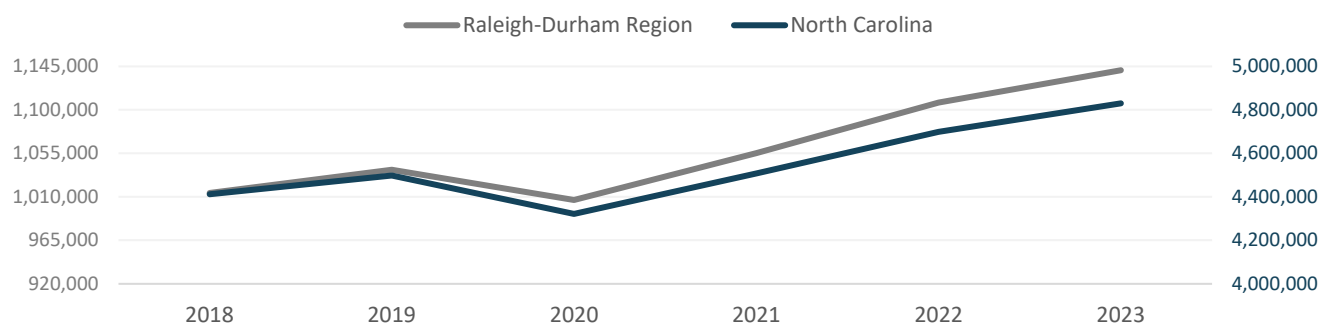
Employment by County

The two counties with the largest workforces in the Raleigh-Durham region, Durham (233,266 workers in 2023) and Wake (639,870 workers in 2023), drove the growth in employment from 2018 to 2023. Both experienced more than a 13% net increase in their workforce and showed steady growth each year except for 2020. Two counties, Chatham (17,338 workers in 2023) and Johnston (58,589 workers in 2023), experienced even greater net growth at 16.2% and 20.3%, respectively. In contrast, five counties in the region experienced a net reduction in workforce across the 6-year period: Granville, Lee, Person, Vance, and Warren. In 2023, these five counties hosted between 2,944 (Warren) and 25,997 (Lee) workers, reflecting a 0.5% (Lee) to 3.6% (Warren) net loss since 2018. Table 1 provides a breakdown of statewide, regional, and county-level employment across the period.

Table 1. Statewide, regional, and county-level employment statistics from 2018-2023.

	2018	2019	2020	2021	2022	2023	Net Change
North Carolina	4,411,261	4,497,459	4,321,018	4,506,954	4,698,369	4,830,066	9.5%
Raleigh-Durham	1,013,958	1,037,876	1,006,713	1,055,155	1,107,503	1,140,992	12.5%
Chatham	14,926	15,391	14,944	15,827	16,822	17,338	16.2%
Durham	204,928	211,616	212,219	221,822	227,975	233,266	13.8%
Franklin	12,324	12,159	11,972	12,333	12,850	13,448	9.1%
Granville	21,122	20,976	20,122	20,258	20,532	20,298	-3.9%
Harnett	25,325	25,742	25,257	26,034	26,992	27,708	9.4%
Johnston	48,698	50,739	50,968	53,041	56,449	58,589	20.3%
Lee	26,134	25,638	24,712	25,291	25,920	25,997	-0.5%
Orange	72,874	73,360	70,002	72,046	75,586	77,843	6.8%
Person	9,790	9,726	9,326	9,517	9,536	9,512	-2.8%
Vance	14,501	14,469	13,533	13,863	14,102	14,179	-2.2%
Wake	560,283	574,989	550,680	582,146	617,818	639,870	14.2%
Warren	3,053	3,071	2,978	2,977	2,921	2,944	-3.6%

Unemployment Rate Trends

Unemployment data, obtained from the Local Area Unemployment Statistics, suggests that the rate of unemployment in the Raleigh-Durham region hovered around 3.6% in 2018 and 2019, below statewide averages. Unsurprisingly, unemployment rates hit a record high across the 6-year period in 2020, reaching 6.4%. Since then, unemployment rates have declined rapidly, reaching pre-pandemic levels by 2022 (3.3%) and resulting in a net change in unemployment rate of -0.5% between 2018 and 2023. Compared to statewide trends, the Raleigh-Durham region saw lower unemployment during the COVID-19 pandemic, and as of 2023 has slightly lower unemployment rates (3.1% versus 3.5% statewide). Figure 2 compares statewide and regional unemployment rates from 2018 to 2023.

Figure 2. Statewide and regional unemployment statistics from 2018-2023.
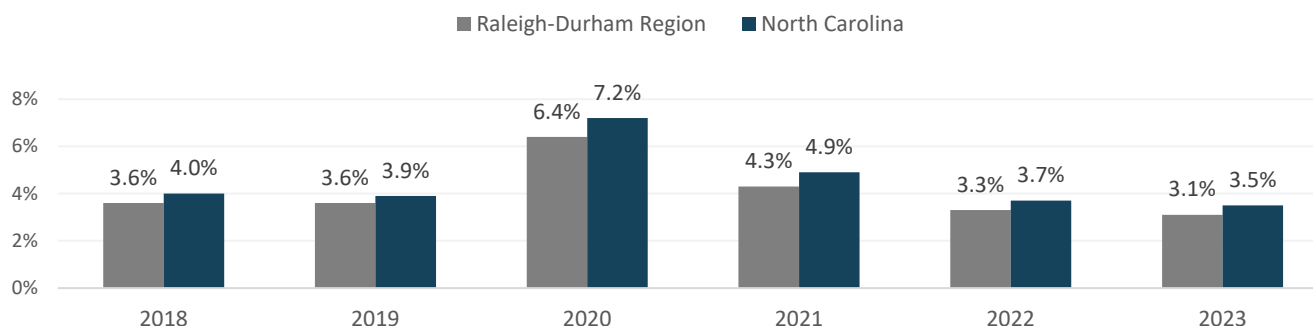
Unemployment Rate by County

In 2023, unemployment rates in the Raleigh-Durham region ranged from 2.9% (Orange County) to 5.4% (Vance and Warren Counties). Based on six years of data from 2018-2023, Chatham, Granville, and Orange Counties tend to have slightly lower unemployment rates than the regional average, Franklin, Harnett, Lee, Person, Vance, and Warren Counties tend to have slightly higher unemployment rates than the regional average, and Durham, Johnston, and Wake Counties tend to be very similar to the regional average (which is unsurprising for Durham and Wake Counties given that, based on the volume of jobs, they drive the unemployment rates for the region). Despite some high rates of unemployment in small counties, all have experienced a decline in unemployment in the two years following the COVID-19 pandemic. Table 2 displays statewide, regional, and county-level unemployment rates from 2018-2023.

Table 2. Statewide, regional, and county-level unemployment statistics from 2018-2023.

	2018	2019	2020	2021	2022	2023
North Carolina	4.0%	3.9%	7.2%	4.9%	3.7%	3.5%
Raleigh-Durham	3.6%	3.6%	6.4%	4.3%	3.3%	3.1%
Chatham	3.4%	3.4%	5.3%	3.7%	3.1%	3.0%
Durham	3.6%	3.4%	6.3%	4.3%	3.2%	3.1%
Franklin	4.1%	4.0%	6.7%	4.8%	3.7%	3.5%
Granville	3.4%	3.3%	5.7%	4.1%	3.2%	3.0%
Harnett	4.7%	4.6%	7.4%	5.4%	4.1%	3.9%
Johnston	3.7%	3.7%	6.2%	4.3%	3.3%	3.2%
Lee	4.4%	4.4%	7.9%	5.5%	4.3%	4.0%
Orange	3.3%	3.3%	5.3%	3.6%	3.1%	2.9%
Person	4.2%	4.2%	7.1%	5.2%	3.8%	3.5%
Vance	5.9%	5.7%	10.0%	7.9%	5.9%	5.4%
Wake	3.5%	3.4%	6.3%	4.1%	3.1%	3.0%
Warren	6.0%	5.6%	9.7%	7.8%	6.4%	5.4%

Existing Industry Sectors and Occupational Groups

Industry Sectors

In 2022, four industries – Retail Trade; Educational Services; Professional, Scientific, and Technical Services; and Health Care and Social Assistance – each accounted for 9.0% or greater of jobs in the Raleigh-Durham region (a combined 489,392 out of 1,196,917 jobs in the area). An additional six industry sectors each boasted between 5.0-7.6% of the total job count, including Construction (60,263 jobs), Self Employed and Unpaid Family Workers (71,830 jobs), Government (74,880 jobs), Administrative and Support and Waste Management and Remediation Services (75,341 jobs), Manufacturing (77,708 jobs), and Accommodation and Food Services (90,755 jobs). Collectively, these ten industries account for nearly 80% of positions in the Raleigh-Durham region in 2022. In contrast, three sectors – Mining, Quarrying, and Oil and Gas Extraction; Utilities; and Agriculture, Forestry, Fishing and Hunting; – had less than 8,000 jobs each and accounted for less than 1.0% of the total job market. Other sectors – for example, Information; Finance and Insurance; and Wholesale Trade – accounted for between 2.5% (roughly 31,000 jobs) and 3.5% (around 42,000 jobs) of the market. Figure 3 shows the statewide and regional distribution of the workforce in each industry sector.
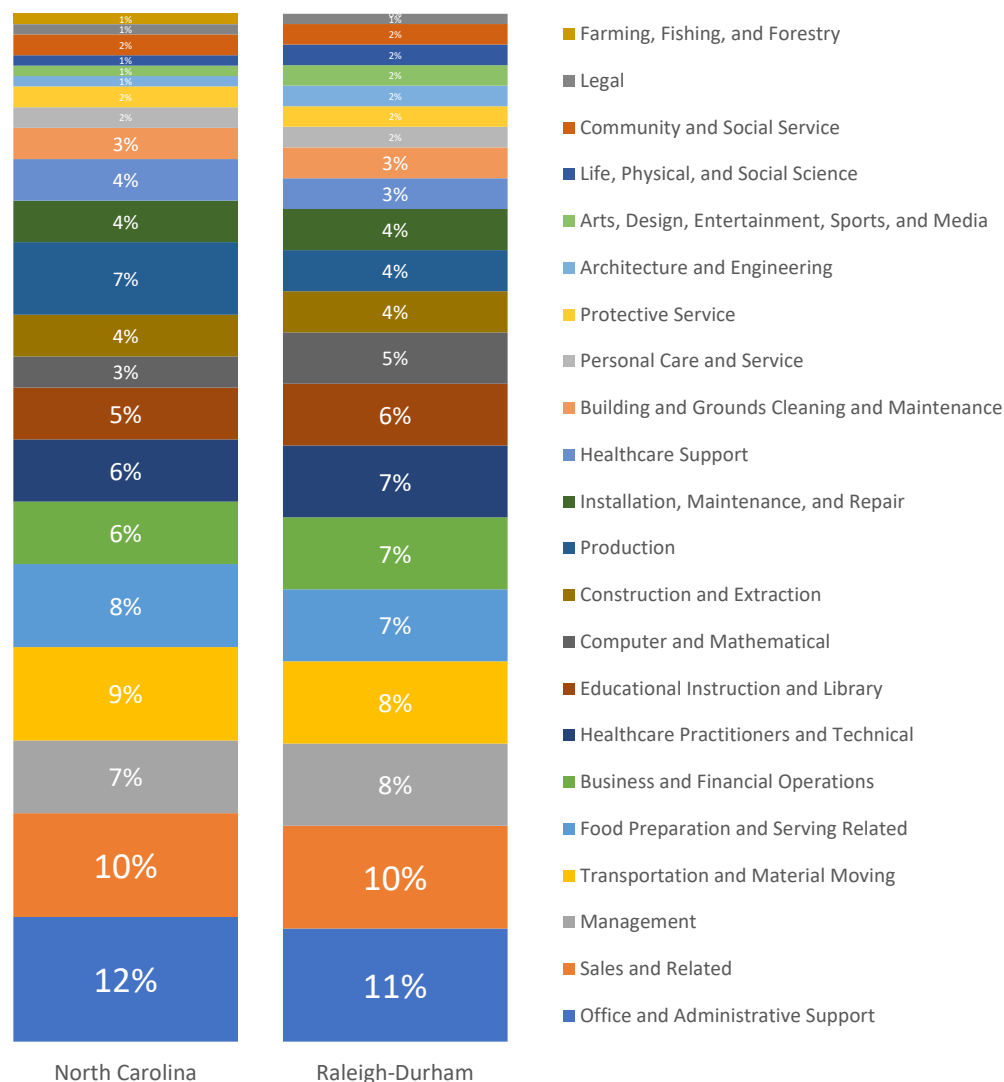
Figure 3. Statewide and regional distribution of industry sectors in 2022.
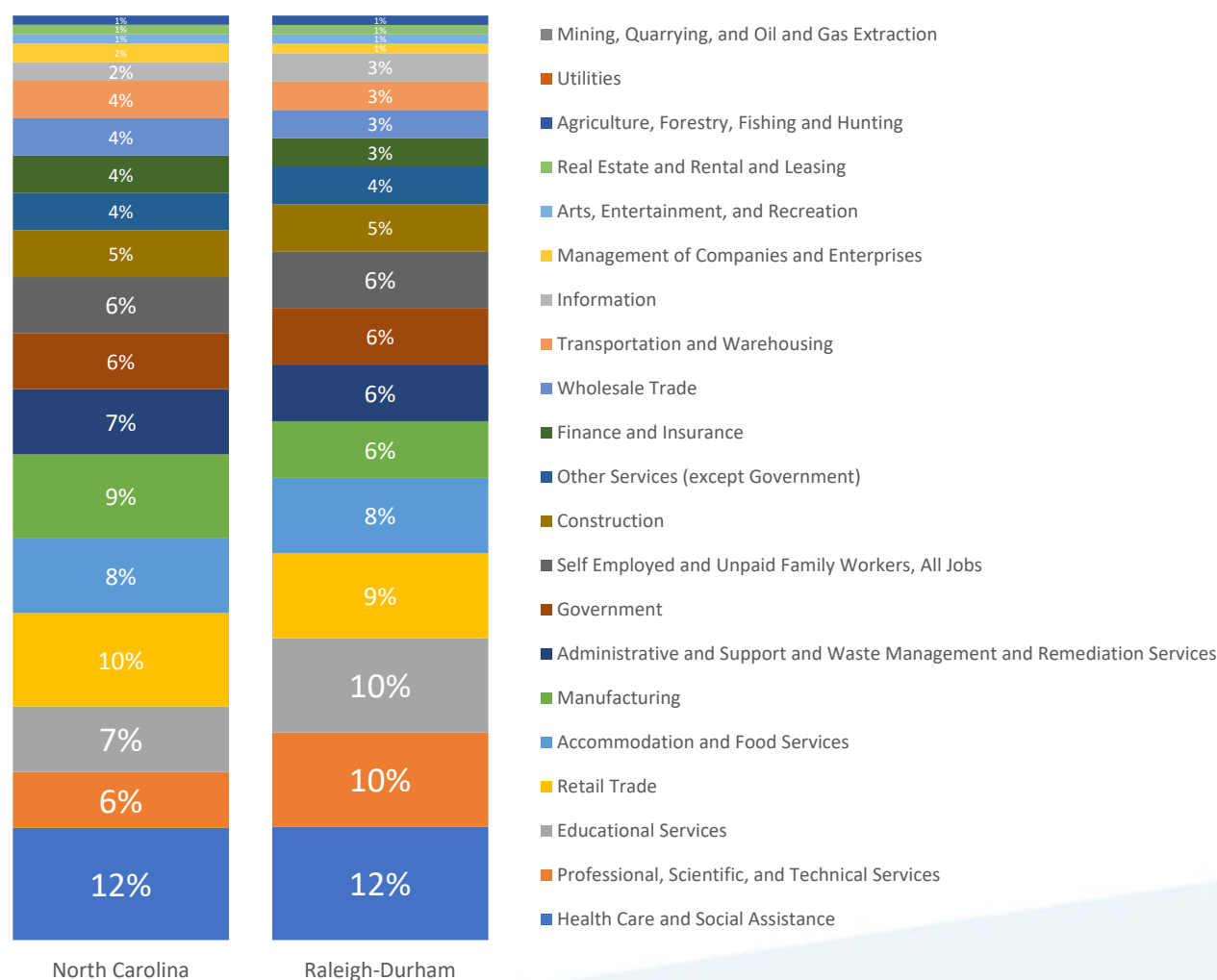
Occupational Groups

The occupational landscape consists of twenty-two occupational groups, the smallest of which (Farming, Fishing, and Forestry Occupations) was estimated to contain 5,357 positions in 2022, and the largest of which (Office and Administrative Support Occupations) was estimated to have 136,235 positions in 2022 in the Raleigh-Durham region, representing between 0.4% and 11.4% of the total workforce in this area. Other smaller occupational groups include Legal Occupations (9,226 jobs), Community and Social Service Occupations (20,135 jobs), and Life, Physical, and Social Science Occupations (20,980 jobs). In total, thirteen occupational groups have less than 50,000 jobs, each representing less than 5.0% of the total workforce. In addition to Office and Administrative Support Occupations, only one occupational group topped 100,000 occupations: Sales and Related Occupations (115,120 jobs, 9.6%). An additional four sectors –Business and Financial Operations Occupations; Food Preparation and Serving Related Occupations; Transportation and Material Moving Occupations; and Management Occupations – had between 84,550 and 98,244 positions, representing between 7.1% and 8.2% of the total job market. Figure 4 shows the statewide and regional distribution of the workforce in each occupational group.

Figure 4. Statewide and regional distribution of occupational groups in 2022.

Legend:
- Farming, Fishing, and Forestry
- Legal
- Community and Social Service
- Life, Physical, and Social Science
- Arts, Design, Entertainment, Sports, and Media
- Architecture and Engineering
- Protective Service
- Personal Care and Service
- Building and Grounds Cleaning and Maintenance
- Healthcare Support
- Installation, Maintenance, and Repair
- Production
- Construction and Extraction
- Computer and Mathematical
- Educational Instruction and Library
- Healthcare Practitioners and Technical
- Business and Financial Operations
- Food Preparation and Serving Related
- Transportation and Material Moving
- Management
- Sales and Related
- Office and Administrative Support

North Carolina | Raleigh-Durham

Labor Supply and Demand

Occupational Trends – State Level

Data from the NC Department of Commerce compares the amount of labor supply (the number of persons looking for a job) to labor demand (the number of job openings) at a statewide level. In 2020, this ratio was positive, indicating an oversupply of job seekers relative to job openings. In 2021, the ratio was 1.0, indicating equal supply and demand, whereas in the years since, job openings have outpaced labor. Figure 5 shows statewide average rates of jobseekers to job openings from 2020 to 2023.

Figure 5. Statewide average rate of jobseekers per job opening from 2020-2023.

2020	2021	2022	2023
1.7	1.0	0.8	0.9
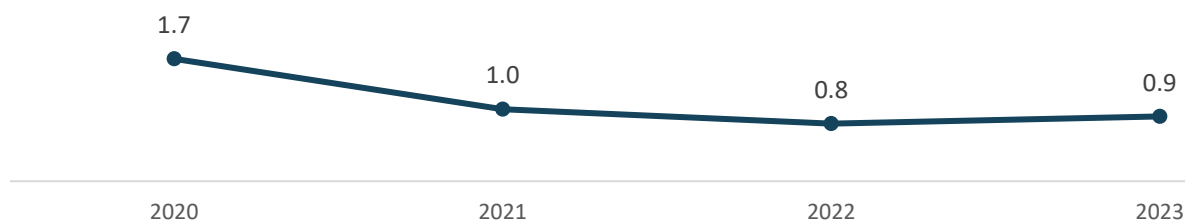
The trend of decreasing ratios generally holds true across all occupational groups (Table 3). As of 2023, Architecture and Engineering Occupations and Healthcare Support Occupations have the lowest ratios (0.2), indicating that there are approximately five jobs for every job seeker in these fields. In contrast, Life, Physical, and Social Science Occupations (2.3), Arts, Design, Entertainment, Sports, and Media Occupations (1.9), and Construction and Extraction Occupations (1.9) have the highest ratios, indicating that there are about twice as many jobseekers as there are available jobs.

Table 3. Statewide average rate of jobseekers per job opening by occupational group from 2020-2023.
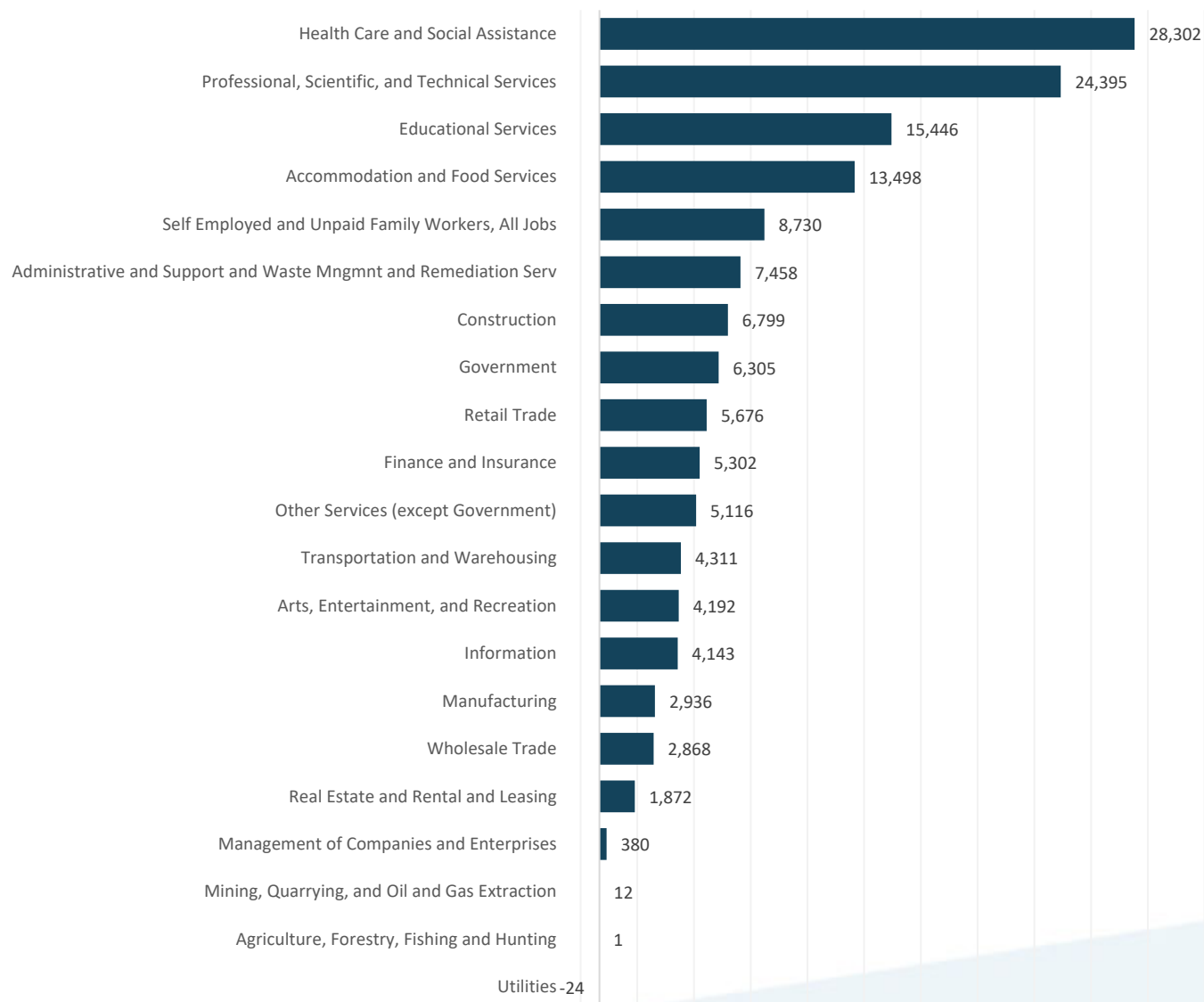
Occupational Group	2020	2021	2022	2023
Architecture and Engineering	1.0	0.4	0.4	0.2
Healthcare Support	0.6	0.8	0.4	0.2
Installation, Maintenance, and Repair	0.9	0.3	0.4	0.3
Business and Financial Operations	1.2	0.9	0.5	0.5
Healthcare Practitioners and Technical	1.0	0.7	0.7	0.5
Community and Social Service	1.9	1.9	0.8	0.7
Food Preparation and Serving Related	1.2	0.5	0.5	0.7
Transportation and Material Moving	2.2	0.8	0.8	0.9
Building and Grounds Cleaning and Maintenance	1.5	1.6	1.5	1.0
Legal	1.2	0.3	0.8	1.0
Office and Administrative Support	1.2	1.0	0.8	1.0
Protective Service	1.3	0.8	0.5	1.0
Educational Instruction and Library	2.8	2.6	1.6	1.1
Production	2.3	1.1	0.8	1.1
Computer and Mathematical	1.7	1.2	1.3	1.2
Management	2.7	1.3	0.9	1.2
Personal Care and Service	3.6	1.8	1.2	1.2
Arts, Design, Entertainment, Sports, and Media	3.1	3.2	2.0	1.9
Construction and Extraction	3.5	2.5	2.2	1.9
Sales and Related	2.5	1.3	1.5	1.9
Life, Physical, and Social Science	2.1	2.6	1.2	2.3
Total (average across all occupational groups)	**1.7**	**1.0**	**0.8**	**0.9**

Employment Projections

Industry Projections

Based on the latest projections, the Raleigh-Durham region is expected to add over 147,700 jobs between 2022 and 2032. Ten sectors are projected to grow by 11%-15%, and three sectors are projected to grow by 19% or more. The Arts, Entertainment, and Recreation sector is expected to have the largest percent growth at 25.3% (+4,192 jobs). The other fastest-growing sectors (Professional, Scientific, and Technical Services and Health Care and Social Assistance) will each add over 24,000 positions. These two sectors alone account for 35.6% of the regional job growth (52,697 out of 147,718 jobs). In contrast, while most industry sectors are expected to grow in the Raleigh-Durham region between 2022 and 2032, the Utilities sector is expected to lose jobs (-24 jobs, -0.7%). Similarly, the Agriculture, Forestry, Fishing and Hunting sector will show little net change. Figure 6 shows the projected net growth across the ten-year period for each industry sector.
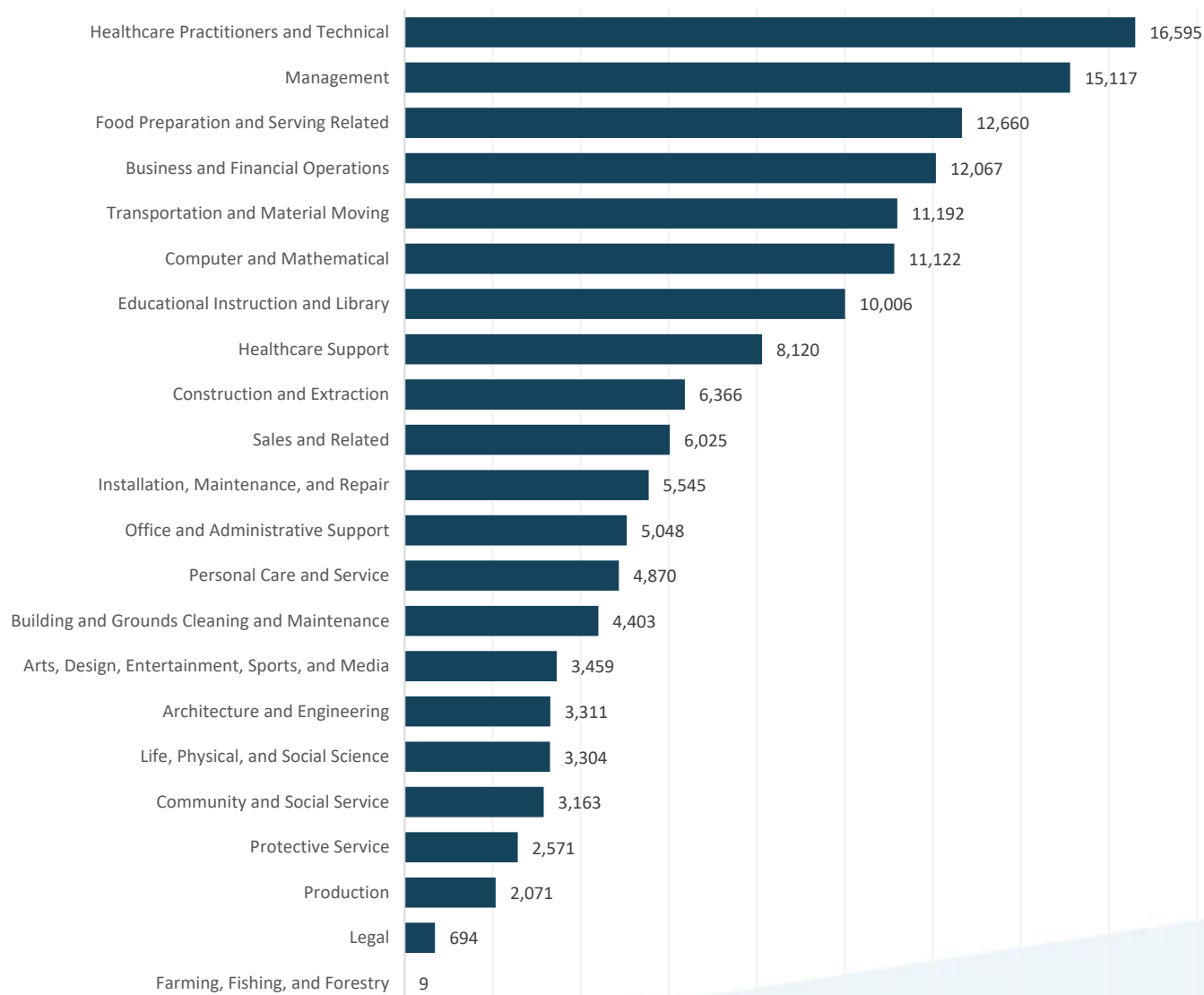
Figure 6. Regional projections for net growth of industry sectors from 2022 to 2032.

Sector	Net Growth
Health Care and Social Assistance	28,302
Professional, Scientific, and Technical Services	24,395
Educational Services	15,446
Accommodation and Food Services	13,498
Self Employed and Unpaid Family Workers, All Jobs	8,730
Administrative and Support and Waste Mngmnt and Remediation Serv	7,458
Construction	6,799
Government	6,305
Retail Trade	5,676
Finance and Insurance	5,302
Other Services (except Government)	5,116
Transportation and Warehousing	4,311
Arts, Entertainment, and Recreation	4,192
Information	4,143
Manufacturing	2,936
Wholesale Trade	2,868
Real Estate and Rental and Leasing	1,872
Management of Companies and Enterprises	380
Mining, Quarrying, and Oil and Gas Extraction	12
Agriculture, Forestry, Fishing and Hunting	1
Utilities	-24

Occupational Group Projections

Occupational employment is divided among twenty-two occupational groups, ten of which are expected to change by less than 5,000 positions in the Raleigh-Durham region between 2022 and 2032. Given the small share of the occupational groups, this still represents a 15.7% or greater change for Personal Care and Service Occupations (+4,870 jobs), Arts, Design, Entertainment, Sports, and Media Occupations (+3,459 jobs), Life, Physical, and Social Science Occupations (+3,304 jobs), and Community and Social Service Occupations (+3,163 jobs). In contrast, the Farming, Fishing, and Forestry Occupations sector is expected to experience little net change across the ten-year period. Meanwhile, six groups are expected to add over 11,000 positions each, growing by 12.0%-20.5%. These six sectors, which include Transportation and Material Moving Occupations (+11,192 jobs), Business and Financial Operations Occupations (+12,067 jobs), Management Occupations (+15,117 jobs), Healthcare Practitioners and Technical Occupations (+16,595 jobs), Computer and Mathematical Occupations (+11,122 jobs), and Food Preparation and Serving Related Occupations (+12,660 jobs), are expected to collectively add over 78,000 positions, accounting for 53% of job growth in the region. Figure 7 shows the projected net growth across the ten-year period for each occupational group.

Figure 7. Regional projections for net growth of occupational groups from 2022 to 2032.

Occupational Group	Net Growth
Healthcare Practitioners and Technical	16,595
Management	15,117
Food Preparation and Serving Related	12,660
Business and Financial Operations	12,067
Transportation and Material Moving	11,192
Computer and Mathematical	11,122
Educational Instruction and Library	10,006
Healthcare Support	8,120
Construction and Extraction	6,366
Sales and Related	6,025
Installation, Maintenance, and Repair	5,545
Office and Administrative Support	5,048
Personal Care and Service	4,870
Building and Grounds Cleaning and Maintenance	4,403
Arts, Design, Entertainment, Sports, and Media	3,459
Architecture and Engineering	3,311
Life, Physical, and Social Science	3,304
Community and Social Service	3,163
Protective Service	2,571
Production	2,071
Legal	694
Farming, Fishing, and Forestry	9

Focused Occupational Projections

Occupational Projections

Specific occupational projections are considered to provide a more granular look at which jobs are expected to have the most openings between 2022 and 2032 based on an annual average of the NC Department of Commerce employment projections. Based on an internal analysis of program alignment, occupations either minimally requiring or preferring a community college credential were included in the analysis.

In the Raleigh-Durham region, the twenty-five occupations with the highest average annual openings range from Preschool Teachers, Except Special Education (556) to Home Health and Personal Care Aides (2,256). In total, these occupations account for a projected 27,278 annual openings. Other occupations with a high number of annual openings include Nursing Assistants (2,008), Registered Nurses (2,151), Secretaries and Administrative Assistants, Except Legal, Medical, and Executive (1,753), and First-Line Supervisors of Food Preparation and Serving Workers (1,651). Meanwhile, occupations toward the lower end of the top twenty-five include Management Analysts; Automotive Service Technicians and Mechanics; Computer Support Specialist; and Electricians.

Current Earnings

In the Raleigh-Durham region, median annual earnings among the top twenty-five occupations range from $30,708 (Teaching Assistants, Except Postsecondary) to $107,622 (Project Manager Specialists). Six of the top twenty-five have annual median earnings under $40,000, while six have annual median earnings between $40,001 and $50,000. Other occupations with lower annual median earnings include Home Health and Personal Care Aides; Childcare Workers; Preschool Teachers, Except Special Education; and Nursing Assistants. Meanwhile, occupations with the highest annual earnings include Management Analysts ($105,227), Registered Nurses ($84,757), and Accountants and Auditors ($84,165).

Table 4 includes occupation titles, median earnings, and average annual openings for 25 Standard Occupation Code (SOC) titles with the largest number of annual openings. Two additional tables are available in the Appendices – one that details the 50 SOC occupation titles with the largest number of annual openings that require or prefer either a minimum of a high school credential or a community college credential (Table 8), and one that details the 50 SOC occupation titles with the largest number of annual openings that require a minimum of a Bachelor's degree (Table 9).

Table 4. Regional summary of the top 25 SOC occupation titles with the highest number of average annual openings.

Occupation Title	Median Earnings	Annual Openings
Home Health and Personal Care Aides	$31,064	2,256
Registered Nurses	$84,757	2,151
Nursing Assistants	$39,151	2,008
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	$48,753	1,753
First-Line Supervisors of Food Preparation and Serving Workers	$44,679	1,651
Bookkeeping, Accounting, and Auditing Clerks	$50,609	1,549
Heavy and Tractor-Trailer Truck Drivers	$52,894	1,546
Accountants and Auditors	$84,165	1,181
Maintenance and Repair Workers, General	$49,432	1,094
Light Truck Drivers	$40,774	1,088
Business Operations Specialists, All Other	$81,627	1,086
Miscellaneous Assemblers and Fabricators	$39,158	1,048
Teaching Assistants, Except Postsecondary	$30,708	911
Medical Assistants	$43,748	836
Human Resources Specialists	$70,831	791
Childcare Workers	$31,259	783
First-Line Supervisors of Construction Trades and Extraction Workers	$76,087	743
Project Management Specialists	$107,622	686
Medical Secretaries and Administrative Assistants	$42,027	651
Exercise Trainers and Group Fitness Instructors	$52,104	627
Management Analysts	$105,227	590
Computer User Support Specialists	$65,365	573
Automotive Service Technicians and Mechanics	$53,119	562
Electricians	$54,274	558
Preschool Teachers, Except Special Education	$37,704	556

Community College Completers and Earnings

This section summarizes the top 25 Classification of Instructional Programs (CIP) codes with the highest number of completers in the region. "Completers" is defined as the unduplicated student count of Curriculum students successfully completing (i.e., graduating with) an AAS, Diploma, Certificate, or workforce continuing education students with 144+ hours of coursework aligned with workplace entry. It should be noted that the completion count is based on student county of residence, regardless of which college they are enrolled in. One important exclusion that results from this methodology is that those in the military with county residencies outside the state are not included in the completion counts.

Estimated median earnings are based on the earnings in the third year after exit of community college graduates who earned either an AAS, Diploma, or Certificate. For this report, exiters from 2016-17 through 2019-20 are included. Those with any post-secondary enrollment after exit are not included. Earnings are based on the highest quarterly wage record within a year projected out to an annual estimate.

In the Raleigh-Durham region, the top 25 CIPs ranged from 77 completers to 931 completers. Seven CIPs produced more than 400 completers, these include Nursing Assistant/Aide; Information Technology; Emergency Medical Technology; Business Administration and Management; Cosmetology/ Cosmetologist; Accounting and Finance; and Criminal Justice and Police Science. Table 5 (below) includes instructional program description, estimated median earnings, and completers for the 25 CIPs with the largest number of completers.

Table 5. Regional summary of the top 25 Classification of Instructional Programs (CIPs) with the highest number of completers (2023-24).
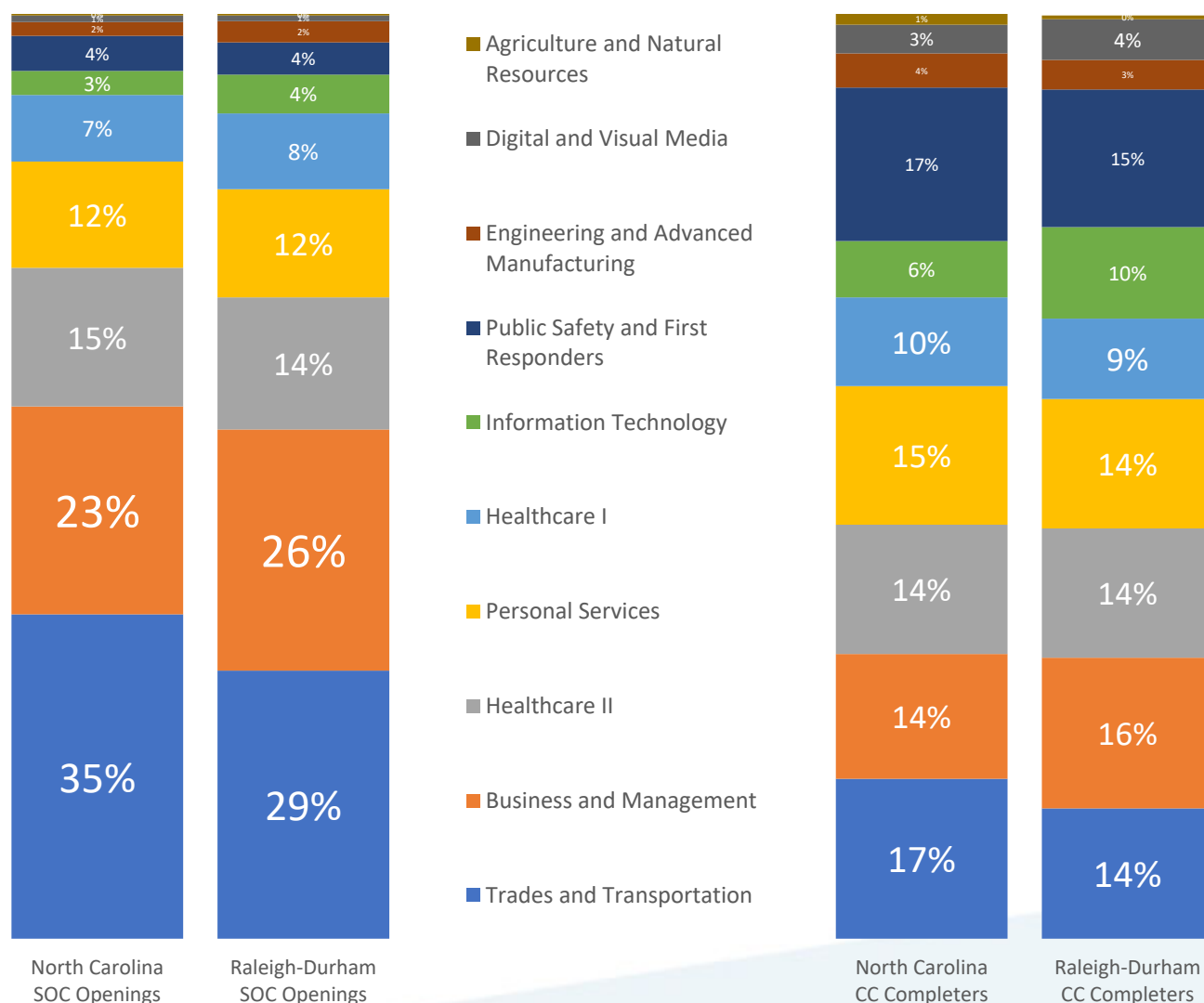
Instructional Program Description	Estimated Median Salary	Completers
Nursing Assistant/Aide and Patient Care Assistant/Aide	$39,984	931
Information Technology	$63,652	919
Emergency Medical Technology/Technician (EMT Paramedic)	$62,948	705
Business Administration and Management, General	$49,704	657
Cosmetology/Cosmetologist, General	$34,370	516
Accounting and Finance	$56,492	439
Criminal Justice/Police Science	$56,120	406
Registered Nursing/Registered Nurse	$79,932	397
Welding Technology/Welder	$51,574	291
Early Childhood Education and Teaching	$37,480	237
Medical Office Management/Administration	$40,596	216
Automobile/Automotive Mechanics Technology/Technician	$50,308	196
Game and Interactive Media Design	*	192
Commercial and Advertising Art	$40,020	180
Truck and Bus Driver/Commercial Vehicle Operator and Instructor	$58,560	178
Criminal Justice/Safety Studies	$48,796	147
Electrician	$55,372	141
Heating, Air Conditioning, Ventilation and Refrigeration Maintenance Technology/Tech	$60,468	135
Massage Therapy/Therapeutic Massage	$39,150	128
Medical/Clinical Assistant	$39,558	123
Building/Property Maintenance	$67,846	93
Child Development	$37,424	92
Barbering/Barber	$35,012	87
Licensed Practical/Vocational Nurse Training	$57,236	83
Radiologic Technology/Science - Radiographer	$58,504	77

*Represents a cell with insufficient data to calculate median

PropelNC Workforce Sector Occupation Projections and Community College Completers

Occupations where a community college credential is either required or identified as employer preferred were categorized into PropelNC-related workforce sectors. Similarly, this categorization was applied to programs and coursework associated with community college completers. Please note that some PropelNC workforce sectors were either combined or split for reporting purposes. Like the state, the largest share of PropelNC occupations in the Raleigh-Durham region were in Trades and Transportation (29.0%). This was followed by Business and Management (26.1%), Healthcare II (14.3%), and Personal Services (11.7%). As for community college completers, the largest share of PropelNC completers in the Raleigh-Durham region was Business and Management (16.3%). This was followed by Public Safety and First Responders (14.9%), Trades and Transportation (14.1%), Healthcare II (14.0%), and Personal Services (14.0%). Figure 8 shows the statewide and regional distribution projected annual openings and 2023-24 community college completers by PropelNC workforce sector.

Figure 8. Statewide and regional distribution projected annual openings and 2023-24 community college completers by PropelNC workforce sector.

Legend:
- Agriculture and Natural Resources
- Digital and Visual Media
- Engineering and Advanced Manufacturing
- Public Safety and First Responders
- Information Technology
- Healthcare I
- Personal Services
- Healthcare II
- Business and Management
- Trades and Transportation

North Carolina SOC Openings: 2%, 4%, 3%, 7%, 12%, 15%, 23%, 35%

Raleigh-Durham SOC Openings: 2%, 4%, 4%, 8%, 12%, 14%, 26%, 29%

North Carolina CC Completers: 1%, 3%, 4%, 17%, 6%, 10%, 15%, 14%, 14%, 17%

Raleigh-Durham CC Completers: 0%, 4%, 3%, 15%, 10%, 9%, 14%, 14%, 16%, 14%

Economic Development Projects

Between 2019 and 2024, the Raleigh-Durham region reported 225 economic development projects, adding a total of 42,089 jobs and $27 billion in capital investment. Across the six-year period, the Raleigh-Durham region saw the greatest job creation and investment in 2022 (11,525 jobs and $10 billion, respectively). In general, the region experienced consistent job creation year-over-year but had a notable decline in 2023. In comparison, statewide job creation was highest in 2022, with nearly 30,000 jobs created from project announcements that year. This corresponds with over $20 billion in investments, which was the highest annual investment during the time period. The following figures show a comparison between annual statewide and regional job creation (Figure 9) and investment (Figure 10) from project announcements during the six-year period.

Figure 9. Statewide and regional job creation from project announcements by year from 2019 through 2024.
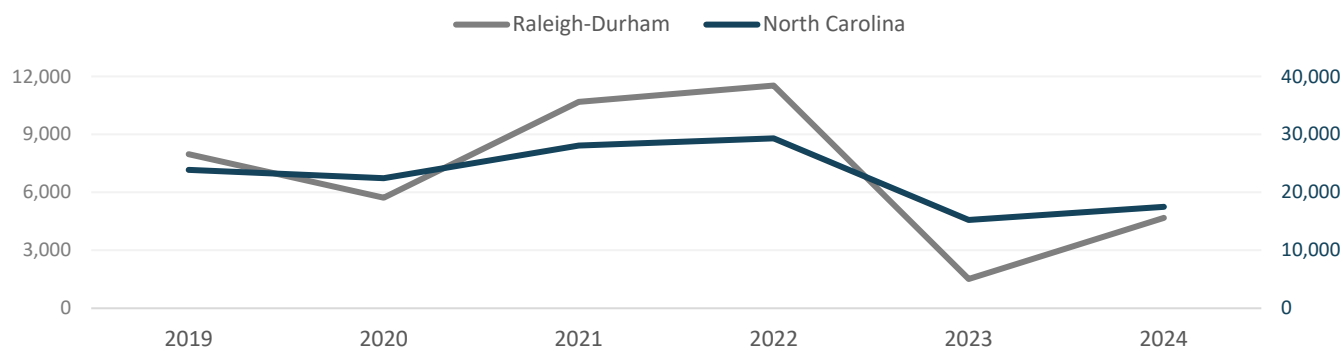
Figure 10. Statewide and regional investment from project announcements by year from 2019 through 2024 (in millions).
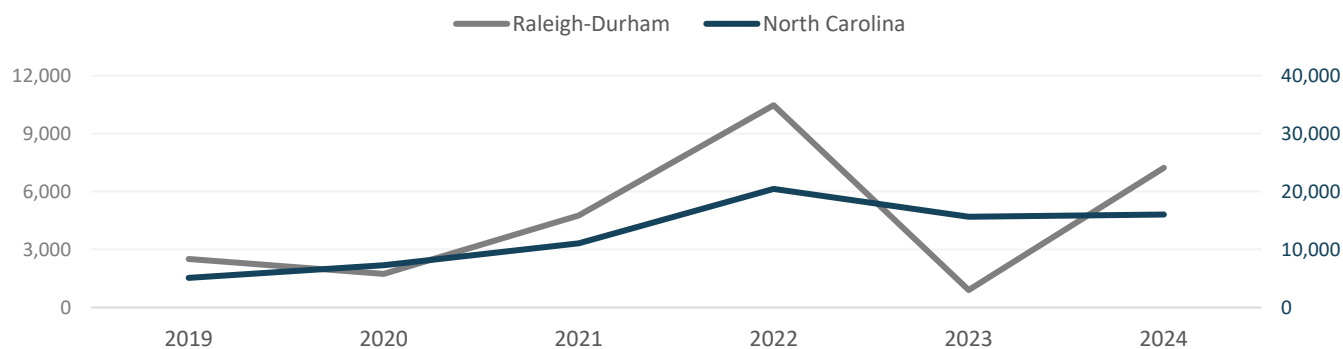
In the Raleigh-Durham region, the industry sectors with the highest number of jobs included Biotechnology, Pharmaceuticals and Life Sciences (11,750 jobs), Automotive (9,082 jobs), and Information Technology (7,687 jobs). Similarly, the industry sectors with the highest investment (in millions) included Biotechnology, Pharmaceuticals and Life Sciences ($14.7), Energy ($5.3), and Automotive ($4.3). Table 6 shows the number of projects, announced jobs, and investment by industry sector from 2019 through 2024.
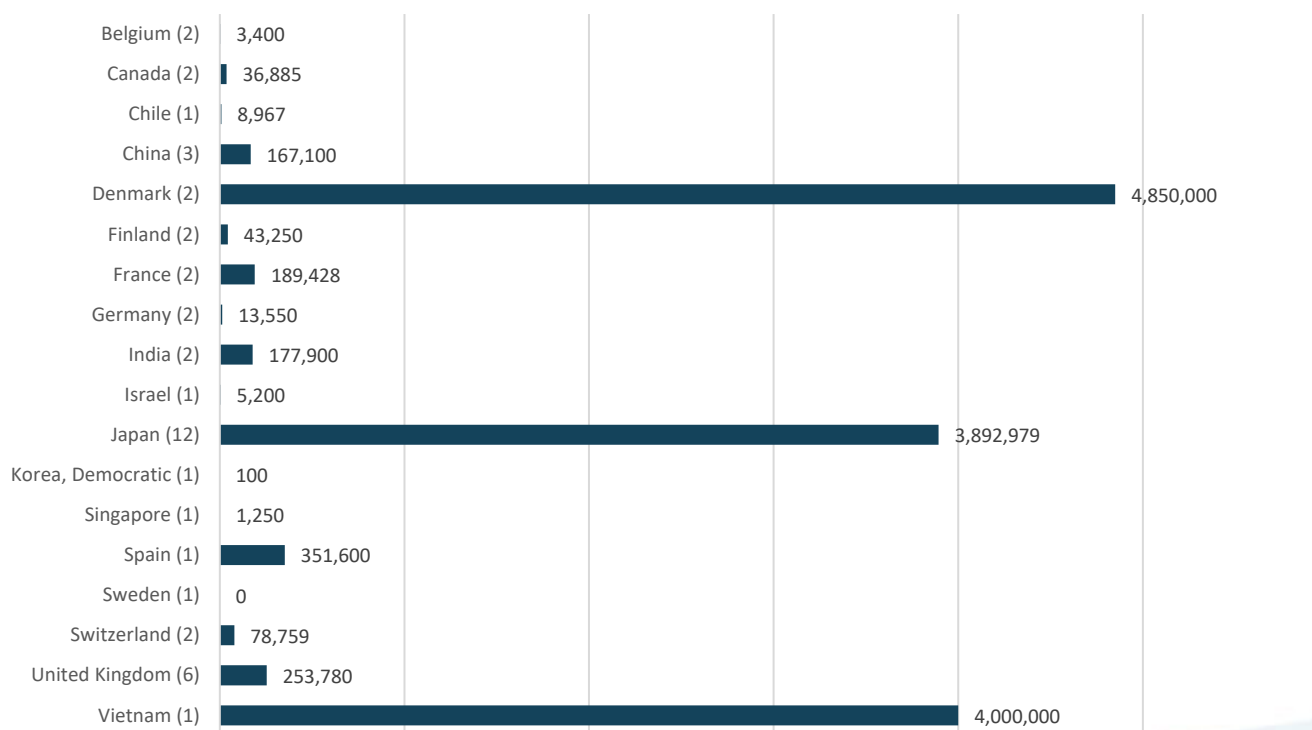
Table 6. Regional Number of Projects, Announced Jobs, and Investment by Industry Sector from 2019-2024.

Industry Sector	Number of Projects	Announced Jobs	Investment (in thousands)
Aerospace/Aviation	5	441	57,700
Automotive	9	9,082	4,253,677
Automotive/Motor Vehicles	3	607	188,050
Biotechnology, Pharmaceuticals and Life Sciences	54	11,750	14,667,790
Business and Financial Services	6	1,064	17,350
Chemicals, Plastics and Rubber	7	334	130,684
Computers and Electronics	1	30	100
Construction Materials	1	157	39,865
Energy	6	2,801	5,310,591
Food, Beverage and Agriculture	17	2,388	486,100
Furniture and Home Furnishings	6	908	133,880
Information Technology	17	7,687	820,615
Other	43	3,318	1,117,125
Textiles	7	546	207,522
Textiles, Apparel and Sporting Goods	1	105	38,859
Transportation and Logistics	2	525	36,000

The announced projects included 44 total foreign direct investment projects from 18 different countries, including Japan (12 projects), United Kingdom (6 projects), and China (3 projects). Foreign-based companies often seek partnerships with local community colleges to establish a talent pipeline, through apprenticeship programs or other custom training opportunities. Figure 11 shows the cumulative investment of all countries who announced projects in the region from 2019 through 2024.

Figure 11. Investment (in thousands) per Foreign Direct Investment Parent Country. Project Count in Parentheses.

Country	Investment
Belgium (2)	3,400
Canada (2)	36,885
Chile (1)	8,967
China (3)	167,100
Denmark (2)	4,850,000
Finland (2)	43,250
France (2)	189,428
Germany (2)	13,550
India (2)	177,900
Israel (1)	5,200
Japan (12)	3,892,979
Korea, Democratic (1)	100
Singapore (1)	1,250
Spain (1)	351,600
Sweden (1)	0
Switzerland (2)	78,759
United Kingdom (6)	253,780
Vietnam (1)	4,000,000

Appendix

Technical Documentation

Table 7. Summary of data sources.

Section	Sub-section(s)	Description	Source
Employment			
	Employment Trends; Employment by County	*The Quarterly Census of Employment and Wages (QCEW) program publishes a quarterly count of employment reported by employers covering more than 95 percent of U.S. jobs, available at the county, metropolitan statistical area, state, and national levels by industry.* **URL**: https://d4.nccommerce.com/QCEWSelection.aspx **Dates**: 2018-2023	**Quarterly Census of Employment and Wages:** N.C. Department of Commerce & U.S. Department of Labor
	Unemployment Rate Trends; Unemployment Rate by County	*The Local Area Unemployment Statistics (LAUS) program is a federal-state cooperative effort in which monthly estimates of total employment and unemployment are prepared.* **URL**: https://d4.nccommerce.com/LausSelection.aspx **Dates**: 2018-2023	**Local Area Unemployment Statistics:** N.C. Department of Commerce & U.S. Department of Labor
Existing Industry Sectors and Occupational Groups			
	Industry Sectors; Occupational Groups	*Two measures of employment produced by the U.S. Bureau of Labor Statistics (BLS) are used to determine base year employment: (1) the Current Employment Statistics (CES) survey, an establishment survey that provides data on wage and salary employment and weekly hours for most nonagricultural industries and the logging industry, and (2) the Current Population Survey (CPS), a household survey that includes information regarding agricultural employment, self-employed workers and hours, and private household workers.* **URL**: https://tools.nccareers.org/employmentprojections/about.html **Dates**: 2022	**Employment Projections Program:** N.C. Department of Commerce & U.S. Department of Labor
Labor Supply and Demand			
	Labor Supply and Demand	*The amount of labor supply—the number of persons looking for a job, by occupation and place of residence—is estimated using labor force data from federal household surveys. Occupational trends are derived from labor force data on experienced workers from the U.S. Bureau of Labor Statistics' (BLS) Current Population Survey (CPS). The amount of labor demand—the number of job openings, by occupation and place of work—is estimated using online job postings data and federal surveys of employers. Data on job openings at the state level come from the BLS's Job Openings and Labor Turnover Survey (JOLTS).* **URL**: https://analytics.nccommerce.com/NC-Labor-Supply-Demand/ **Dates**: 2020-2023	**NC Labor Supply and Demand:** N.C. Department of Commerce & U.S. Department of Labor
Employment Projections			
	Industry Projections; Occupational Group Projections	*Every two years, in conjunction with the Bureau of Labor Statistics (BLS), the North Carolina Department of Commerce publishes long-term industry and occupational employment projections for statewide and sub-state areas. The employment projections are an estimate of the future demand for workers based on historical employment data and various economic factors.* **URL**: https://tools.nccareers.org/employmentprojections/about.html **Dates**: 2022, 2032 projections	**Employment Projections Program:** N.C. Department of Commerce & U.S. Department of Labor

Focused Occupational Projections and Current Earnings

Occupational Projections	Occupational projections were calculated using the methodology described above for "Occupational Group Projections." Based on an internal analysis of program alignment, occupations either minimally requiring or preferring a community college credential were included in the analysis. **URL**: https://tools.nccareers.org/employmentprojections/about.html **Dates**: 2022, 2032 projections	**Employment Projections Program:** N.C. Department of Commerce & U.S. Department of Labor
Current Earnings	*LEAD utilizes industry employment data derived from the Enhanced Quarterly Unemployment Insurance (EQUI) dataset. The data contains a quarterly count of employment and wages report that is sent from employers based on the North American Industry Classification System (NAICS) code. Employment data on uncovered industries within the Unemployment Insurance (UI) program is collected from other sources such as Current Employment Statistics (CES), Census Bureau, and Railroad Retirement Board.* **Dates**: 2022	**Enhanced Quarterly Unemployment Insurance (EQUI) dataset:** N.C. Department of Commerce & U.S. Department of Labor

Community College Completers and Earnings

Community College Completers	"Completers" is defined as the unduplicated student count of Curriculum students successfully completing (i.e., graduating with) an AAS, Diploma, Certificate, or workforce continuing education students with 144+ hours of coursework aligned with workplace entry. **Dates**: 2023-2024 academic year	North Carolina Community Colleges
Estimated Median Salary	Estimated median earnings are based on the earnings in the third year after exit of community college graduates who earned either an AAS, Diploma, or Certificate. For this report, exiters from 2016-17 through 2019-20 are included. Those with any postsecondary enrollment after exit are not included. Earnings are based on the highest quarterly wage record within a year projected out to an annual estimate. **Dates**: graduates from 2016-17 through 2019-20; wages from 2019-20 through 2022-23	North Carolina Community Colleges; National Student Clearinghouse (NSC); Common Follow-up System (CFS)

PropelNC Workforce Sector Occupation Projections and Community College Completers

PropelNC Workforce Sector Occupation Projections and Community College Completers	See methodology for occupational projections and community college completers above. Occupations were categorized into PropelNC-related workforce sectors. Similarly, this categorization was applied to curriculum programs and workforce continuing education coursework associated with community college completers. Please note that some PropelNC workforce sectors were either combined or split for reporting purposes.	North Carolina Community Colleges

Economic Development Projects

Economic Development Projects	The North Carolina Economic Development Activity Report is a comprehensive picture of job and investment growth, tracking job and capital investment of economic development projects, by county, across the state of North Carolina. **URL**: https://cir.edpnc.com/ **Dates**: 2019-2024	North Carolina Economic Development Activity Report (EDAR): The Economic Development Partnership of North Carolina (EDPNC)

Italics indicate that the text is copied directly from documentation provided by the data producers.

Detailed Data Tables

Table 8. Summary of the top 50 SOC occupation titles, where a community college education is either required or preferred, with the highest number of annual openings in the Raleigh-Durham region.

Occupation Title	Median Earnings	Annual Openings
Home Health and Personal Care Aides	$31,064	2,256
Registered Nurses	$84,757	2,151
Nursing Assistants	$39,151	2,008
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	$48,753	1,753
First-Line Supervisors of Food Preparation and Serving Workers	$44,679	1,651
Bookkeeping, Accounting, and Auditing Clerks	$50,609	1,549
Heavy and Tractor-Trailer Truck Drivers	$52,894	1,546
Accountants and Auditors	$84,165	1,181
Maintenance and Repair Workers, General	$49,432	1,094
Light Truck Drivers	$40,774	1,088
Business Operations Specialists, All Other	$81,627	1,086
Miscellaneous Assemblers and Fabricators	$39,158	1,048
Teaching Assistants, Except Postsecondary	$30,708	911
Medical Assistants	$43,748	836
Human Resources Specialists	$70,831	791
Childcare Workers	$31,259	783
First-Line Supervisors of Construction Trades and Extraction Workers	$76,087	743
Project Management Specialists	$107,622	686
Medical Secretaries and Administrative Assistants	$42,027	651
Exercise Trainers and Group Fitness Instructors	$52,104	627
Management Analysts	$105,227	590
Computer User Support Specialists	$65,365	573
Automotive Service Technicians and Mechanics	$53,119	562
Electricians	$54,274	558
Preschool Teachers, Except Special Education	$37,704	556
Hairdressers, Hairstylists, and Cosmetologists	$40,272	555
Computer Systems Analysts	$110,797	551
Dental Assistants	$50,831	499
Pharmacy Technicians	$42,215	473
Bus Drivers, School	$38,563	471
Executive Secretaries and Executive Administrative Assistants	$66,259	449
Farmers, Ranchers, and Other Agricultural Managers	$85,188	436
Carpenters	$50,324	428
Property, Real Estate, and Community Association Managers	$67,285	416
Real Estate Sales Agents	$46,711	411
Heating, Air Conditioning, and Refrigeration Mechanics and Installers	$56,387	410
First-Line Supervisors of Mechanics, Installers, and Repairers	$78,003	399
Buyers and Purchasing Agents	$70,371	379
Plumbers, Pipefitters, and Steamfitters	$54,443	366
Police and Sheriff's Patrol Officers	$62,504	364
First-Line Supervisors of Production and Operating Workers	$69,185	364
Food Service Managers	$68,613	363
Veterinary Assistants and Laboratory Animal Caretakers	$37,949	346
Clinical Laboratory Technologists and Technicians	$65,232	345
Firefighters	$39,824	330
Operating Engineers and Other Construction Equipment Operators	$51,736	321
Paralegals and Legal Assistants	$61,603	319
Correctional Officers and Jailers	$48,898	304
First-Line Supervisors of Landscaping, Lawn Service, and Groundskeeping Workers	$54,902	304
Licensed Practical and Licensed Vocational Nurses	$62,753	293

Table 9. Summary of the top 50 SOC occupation titles (including ties), where a Bachelor's degree is required, with the highest number of annual openings in the Raleigh-Durham region.

Occupation Title	Median Earnings	Annual Openings
Market Research Analysts and Marketing Specialists	$83,140	951
Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products	$109,946	457
Social Science Research Assistants	$54,306	341
Clergy	$62,021	341
Writers and Authors	$75,268	298
Coaches and Scouts	$46,016	289
Natural Sciences Managers	$176,964	282
Middle School Teachers, Except Special and Career/Technical Education	$54,381	251
Data Scientists	$133,146	187
Compliance Officers	$76,694	185
Information Security Analysts	$132,962	176
Administrative Services Managers	$107,957	174
Mechanical Engineers	$104,100	168
Computer Network Architects	$135,246	167
Human Resources Managers	$136,665	152
Community and Social Service Specialists, All Other	$61,804	151
Architectural and Engineering Managers	$151,308	150
Industrial Production Managers	$126,136	134
Electrical Engineers	$114,038	131
Computer Programmers	$111,344	117
Kindergarten Teachers, Except Special Education	$52,942	116
Directors, Religious Activities and Education	$65,701	110
Career/Technical Education Teachers, Postsecondary	$64,387	108
Architects, Except Landscape and Naval	$84,413	105
Teaching Assistants, Postsecondary	$33,213	102
Special Education Teachers, Kindergarten and Elementary School	$62,440	100
Technical Writers	$95,717	99
Adult Basic Education, Adult Secondary Education, and English as a Second Language Instructors	$63,123	96
Occupational Health and Safety Specialists	$86,169	93
Editors	$75,499	93
Financial Specialists, All Other	$84,739	91
Interior Designers	$63,077	86
Biological Scientists, All Other	$104,319	85
Sales Engineers	$113,247	81
Facilities Managers	$103,484	80
Art Directors	$106,461	80
Social and Community Service Managers	$77,109	79
Fundraisers	$66,562	77
Special Education Teachers, Secondary School	$53,800	75
Special Effects Artists and Animators	$82,034	74
Soil and Plant Scientists	$85,600	73
Compensation, Benefits, and Job Analysis Specialists	$66,203	71
Purchasing Managers	$141,712	70
Producers and Directors	$65,490	69
Social Scientists and Related Workers, All Other	$86,776	66
Career/Technical Education Teachers, Secondary School	$61,697	64
Dietitians and Nutritionists	$67,875	62
Health Education Specialists	$67,542	60
Probation Officers and Correctional Treatment Specialists	$56,394	58
Training and Development Managers	$126,085	55
Interpreters and Translators	$49,973	55

Table 10. Summary of the top 50 Classification of Instructional Programs (CIPs) with the highest number of completers.

Instructional Program Description	Estimated Median Salary	Completers
Nursing Assistant/Aide and Patient Care Assistant/Aide	$39,984	931
Information Technology	$63,652	919
Emergency Medical Technology/Technician (EMT Paramedic)	$62,948	705
Business Administration and Management, General	$49,704	657
Cosmetology/Cosmetologist, General	$34,370	516
Accounting and Finance	$56,492	439
Criminal Justice/Police Science	$56,120	406
Registered Nursing/Registered Nurse	$79,932	397
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Commercial and Advertising Art	$40,020	180
Truck and Bus Driver/Commercial Vehicle Operator and Instructor	$58,560	178
Criminal Justice/Safety Studies	$48,796	147
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Building/Property Maintenance	$67,846	93
Child Development	$37,424	92
Barbering/Barber	$35,012	87
Licensed Practical/Vocational Nurse Training	$57,236	83
Radiologic Technology/Science - Radiographer	$58,504	77
Management Science	$87,196	62
Aesthetician/Esthetician and Skin Care Specialist	$31,224	58
Legal Assistant/Paralegal	$46,446	53
Culinary Arts/Chef Training	$37,286	51
Forensic Science and Technology	$46,312	50
Language Interpretation and Translation	$40,008	50
Mechanical/Mechanical Engineering Technology/Technician	$60,488	48
Manufacturing Engineering Technology/Technician	$65,988	47
Fire Prevention and Safety Technology/Technician	$75,524	45
Dental Assisting/Assistant	$42,920	42
Office Management and Supervision	$41,778	41
Dental Hygiene/Hygienist	$66,940	41
Architectural Engineering Technologies/Technicians	$56,418	40
Autobody/Collision and Repair Technology/Technician	$55,378	37
Mental and Social Health Services and Allied Professions, Other	$29,124	35
Sports, Kinesiology, and Physical Education/Fitness, Other	$38,012	35
Electromechanical Technologies/Technicians, Other	$70,960	34
Baking and Pastry Arts/Baker/Pastry Chef	$38,772	33
Lineworker	$92,864	33
Institutional Food Workers	*	30
Logistics, Materials, and Supply Chain Management	$64,958	30
Hotel, Motel, and Restaurant Management	$39,512	29
Clinical Research Coordinator	*	28
Diagnostic Medical Sonography/Sonographer and Ultrasound Technician	$70,022	26
Electrical, Electronic, and Communications Engineering Technology/Technician	$65,512	26
Computer Numerically Controlled (CNC) Machinist Technology/CNC Machinist	*	26

*Represents a cell with insufficient data to calculate median.

Acknowledgements