

North Carolina & The Great Recession: A Data Portrait

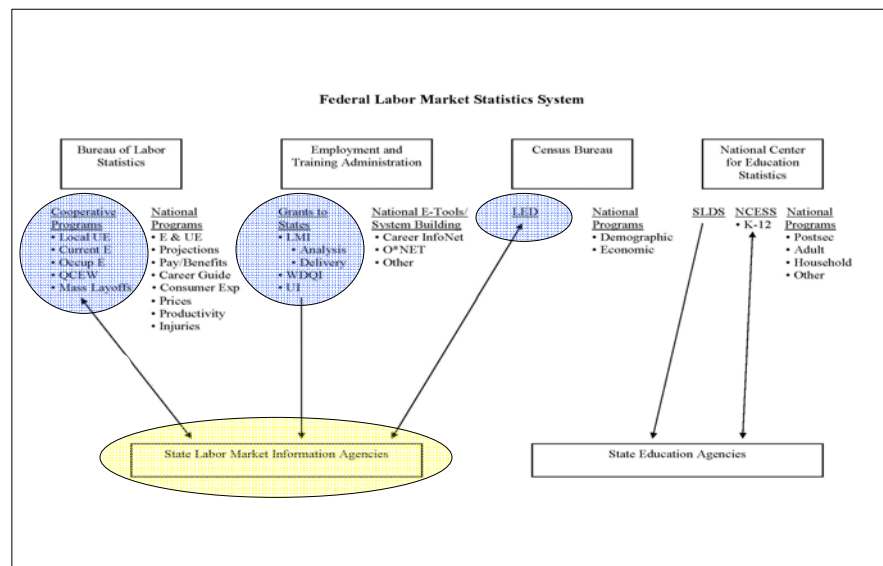
Presentation to 2010 Leadership Conference
Employment Security Commission of North Carolina

~ November 4, 2010 ~

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Chapel Hill, North Carolina



Building The Story: The Public Data System

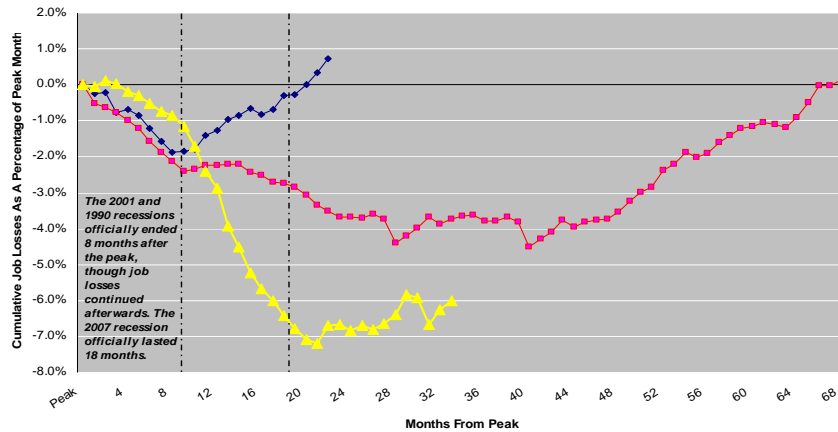


Source: Adapted from Brookings Institution Roundtable on "Putting America to Work," 9/27/10.



Part 1: Job Loss During The Great Recession

Cumulative Job Losses, Measured From Labor Market Peak to Recovery, by Month, North Carolina, Last Three Recessions



Source: Current Employment Statistics, ESC
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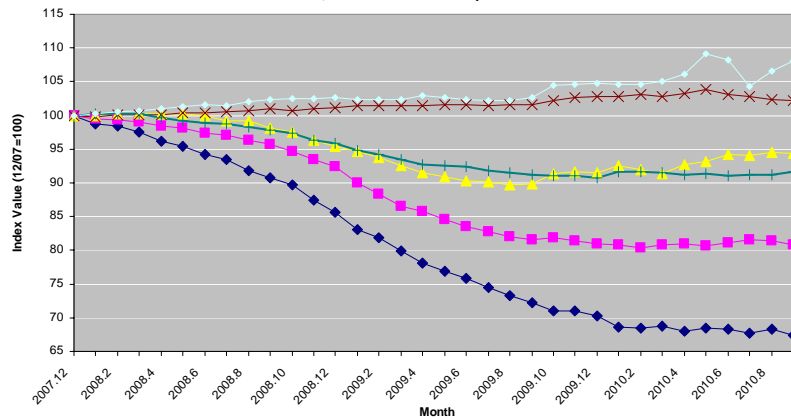
Legend: 1990 Recession (blue diamonds), 2001 Recession (pink squares), Current (yellow triangles)

10/22/10



A Widespread Recession

Change in Payroll Employment (Seasonally Adjusted), for Selected Industries, North Carolina, December 2007 - September 2010



Source: Analysis of Current Employment Statistics, © 2010, South by North Strategies, Ltd.

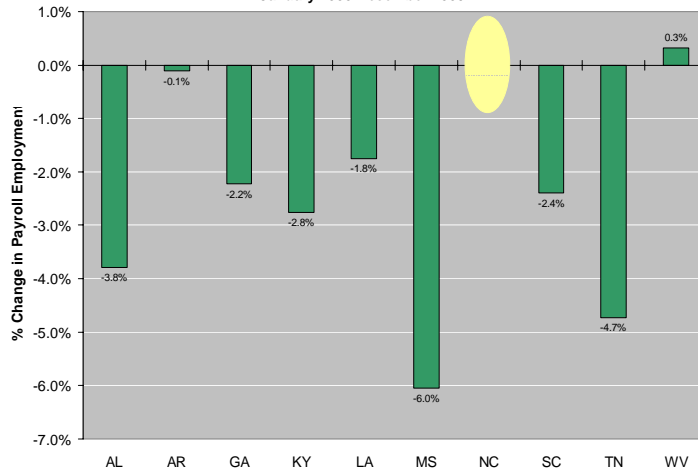
Legend: Construction (blue diamonds), Manufacturing (pink squares), Trade/Transp. (green triangles), Education and Health Services (red crosses), Government (cyan pluses)

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A Decade with Virtually No Net Job Growth

Change in Seasonally-Adjusted Payroll Employment, Selected Southern States, January 2000-December 2009

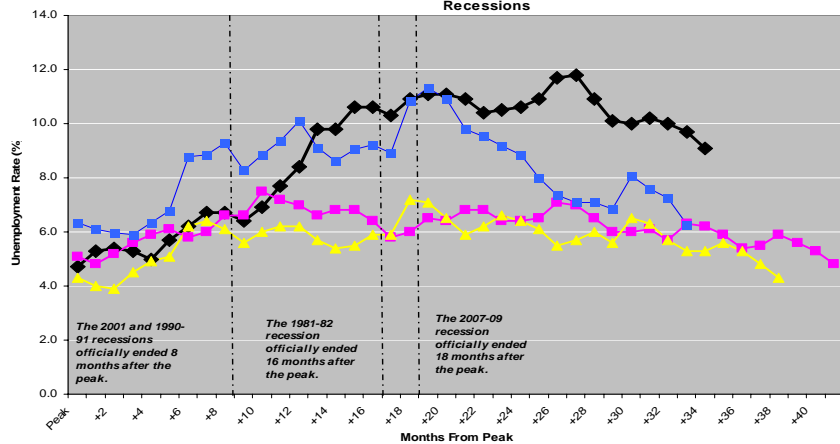


Source: South by North Strategies, Ltd. analysis of Current Employment Statistics, 7/28/10



Part 2: Rising Joblessness

NC Monthly Unemployment Rates (Unadjusted) From Peak to Recovery, Last Four Recessions



Source: SBN Strategies Analysis of ESC and BLS data

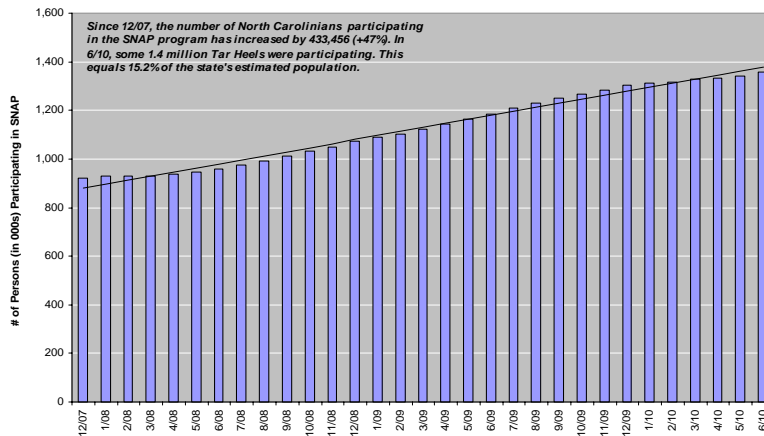
Legend: Current (black line with diamonds), 2001 Recession (magenta line with squares), 1990-91 Recession (yellow line with triangles), 1981-82 Recession (blue line with squares)

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Mounting Economic Hardships

Changes in # Persons Participating in SNAP Program, North Carolina
December 2007 - June 2010



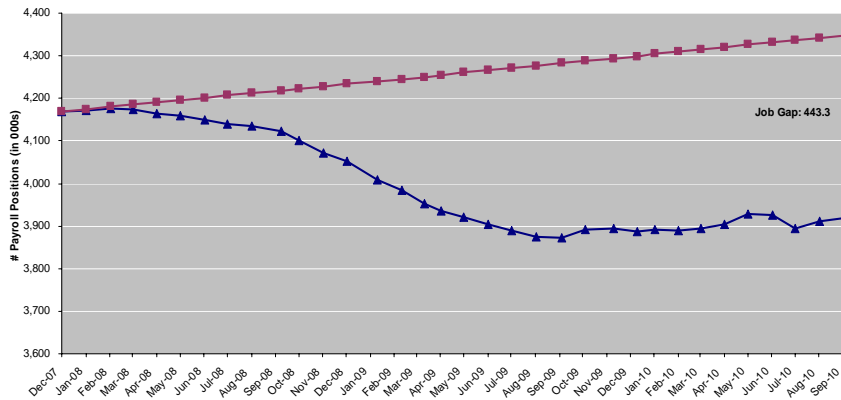
Source: South by North Strategies, Ltd. analysis of USDA data compiled by Food Research and Action Center © 2010, South by North Strategies, Ltd.

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Part 3: Future Prospects – Payroll Jobs

North Carolina's Job Gap
Actual Payroll Employment vs. Needed Payroll Employment
December 2007 - September 2010



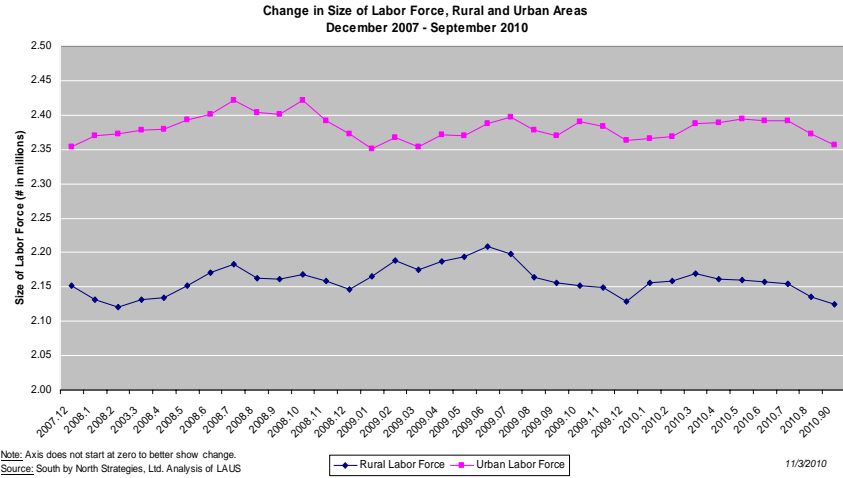
Source: South by North Strategies, Ltd. analysis of LAUS and CES data, various months © 2009-10, South by North Strategies, Ltd.

Actual Payroll Employment — Needed Payroll Employment

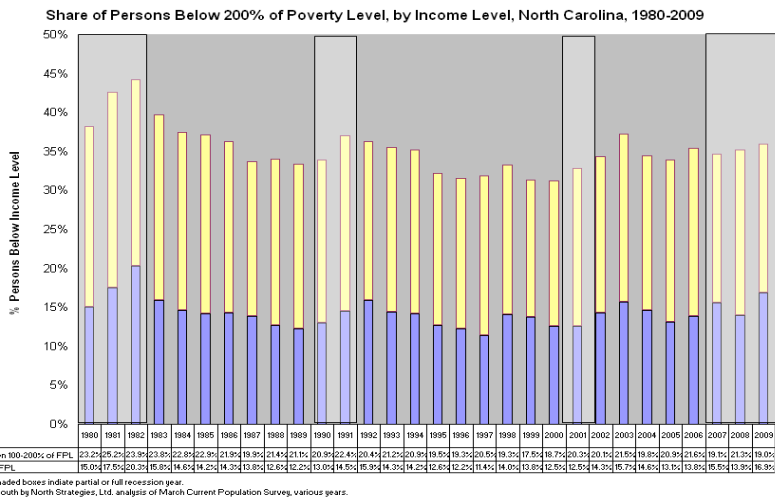
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Future Prospects - Unemployment



Future Prospects – Economic Hardship



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Presentation is available for viewing at
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