

Warning: Gale Force Demographic Wind Gusts Ahead

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PATHWAYS TO PROSPERITY

DISRUPTIVE DEMOGRAPHICS | WHOLE COMMUNITY HEALTH | WORK FORCE DEVELOPMENT

drjameshjohnsonjr.com

Key Demographic Drivers of Change

Moving & Grooving

“Browning” & “Graying”

Disappearing, Rebelling, & Hugging

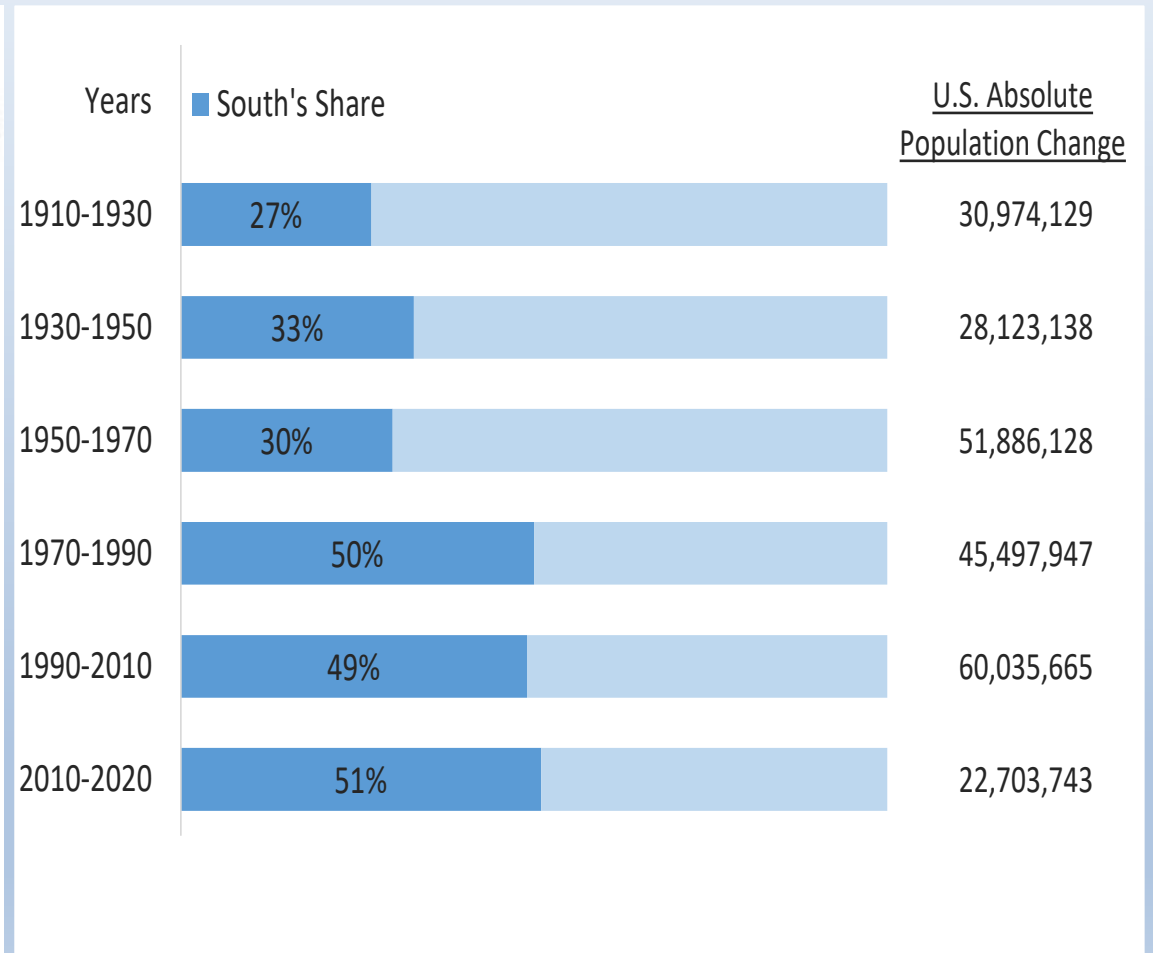
MY BLUF

Bottom Line Up Front

Moving and Grooving

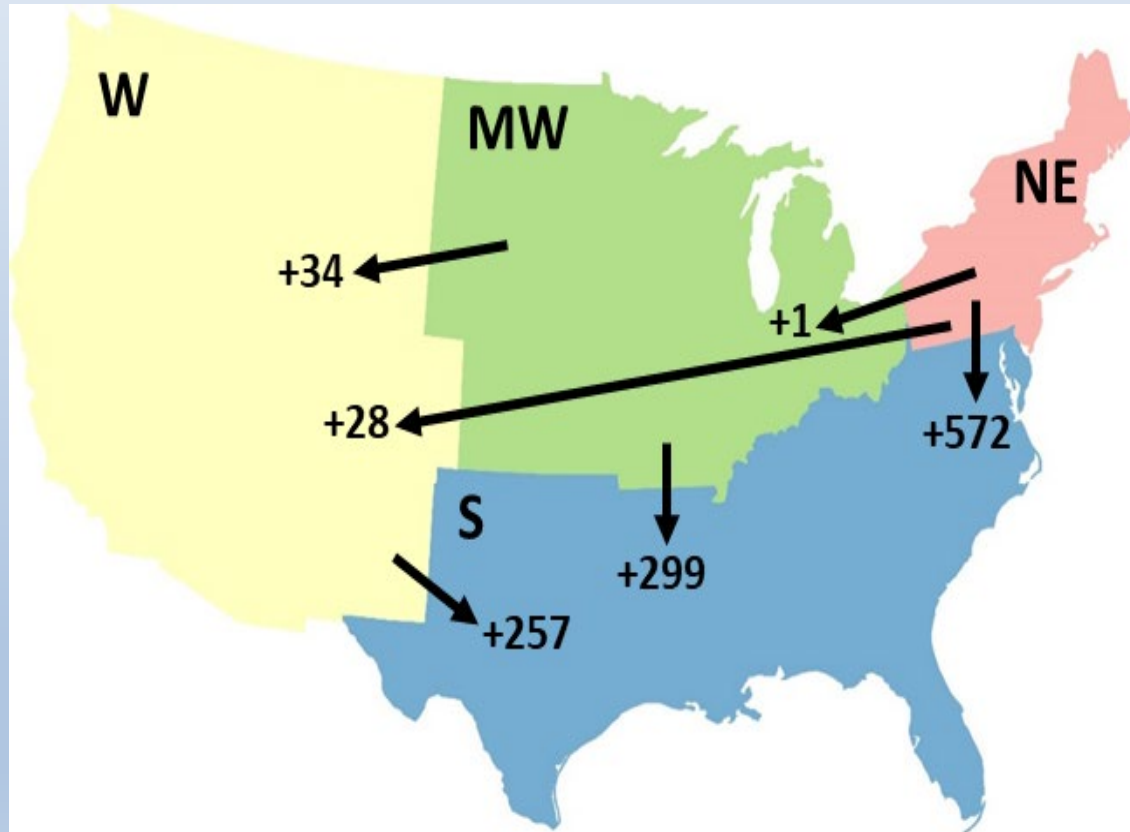
The South Rises—Again!

The South's Share of U.S. Net Population Growth 1910-2020



U.S. Regional Migration Flows

Net Regional Migration Flows, 2010-2015



Net Migration Trends by Region and Major Demographic Group, 2010-2015

	Northeast	Midwest	South	West
Total	-622	-331	+1,147	-193
White	-402	-267	+733	-64
Black	-89	-69	+220	-62
Asian	-58	-23	+58	+23
Hispanic	-51	+13	+122	-84
Elderly	-43	-72	+124	-9
Native born	-528	-304	+994	-161
Foreign born	-94	-27	+153	-32

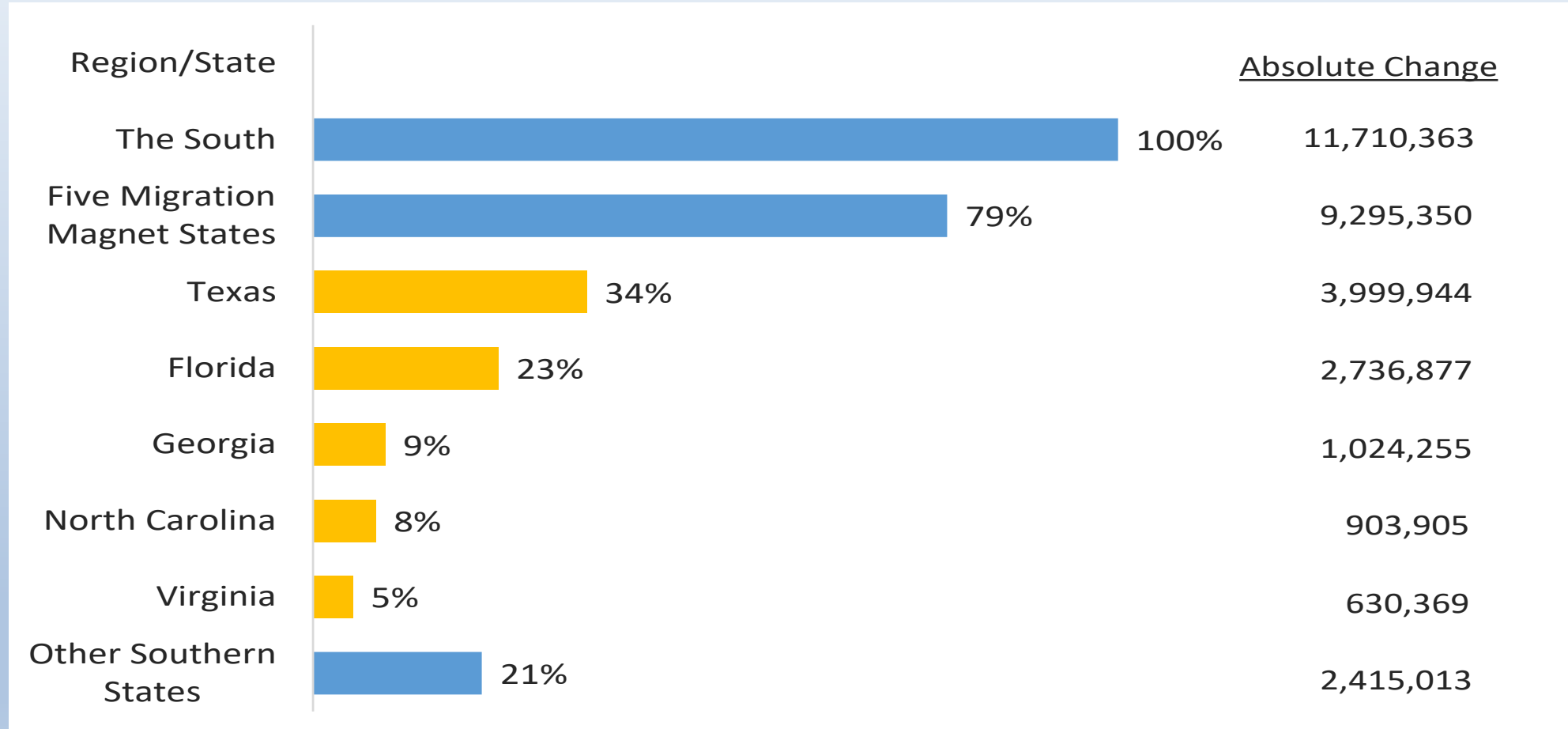
(numbers in thousands)

■ = Net Import ■ = Net Export

Absolute & Percent Population Change, 2010-2020

Area	2020 Population	Absolute Population Change, 2010-2020	Percent Population Change, 2010-2020
United States	331,499,281	22,703,743	7.4
Northeast	57,609,148	2,291,908	4.1
Midwest	68,985,454	2,058,453	3.1
South	126,266,107	11,710,363	10.2
West	78,588,572	6,643,019	9.2

State Shares of South's Net Growth, 2010-2020



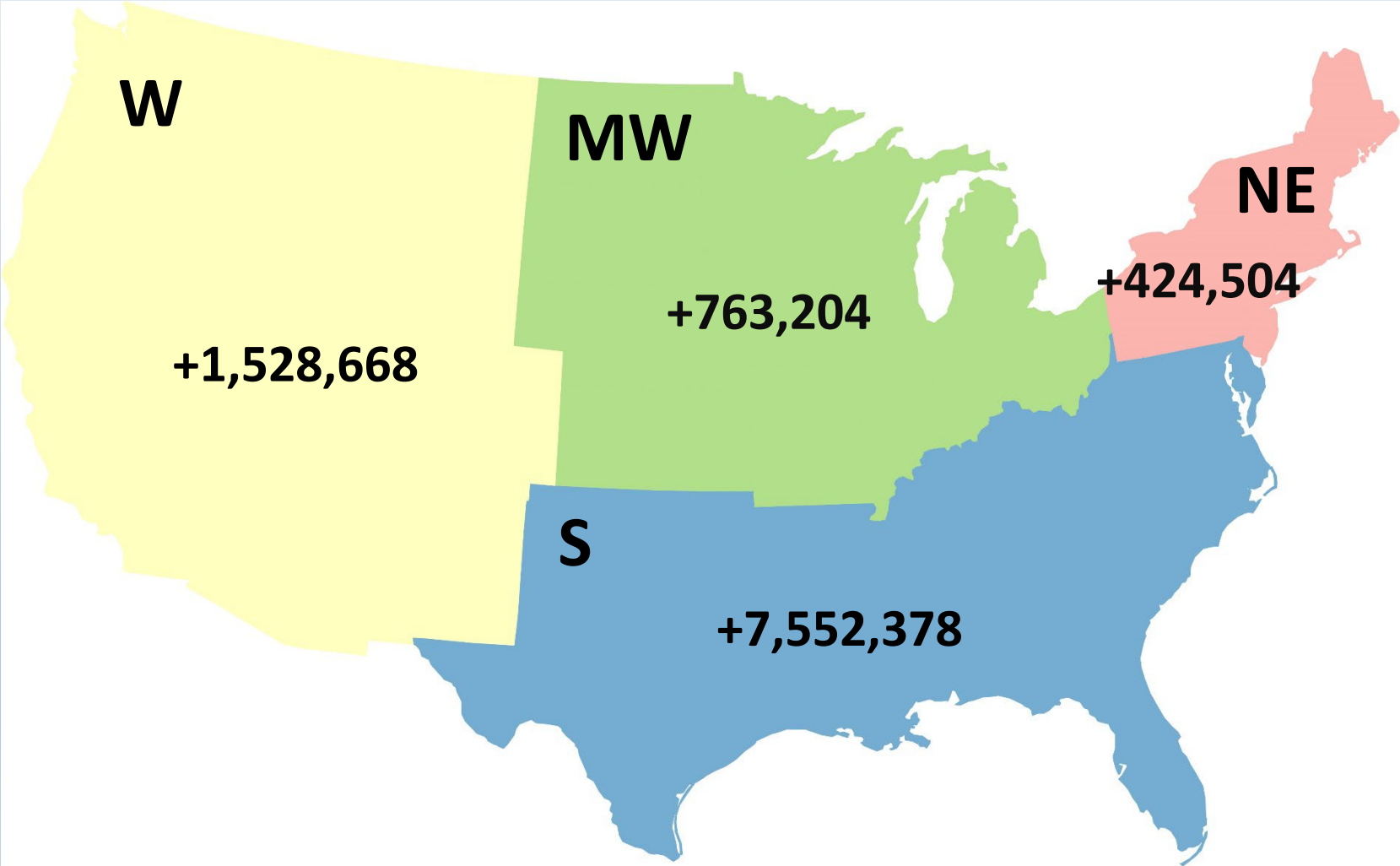
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North Carolina	10,439,459	903,976	9.5

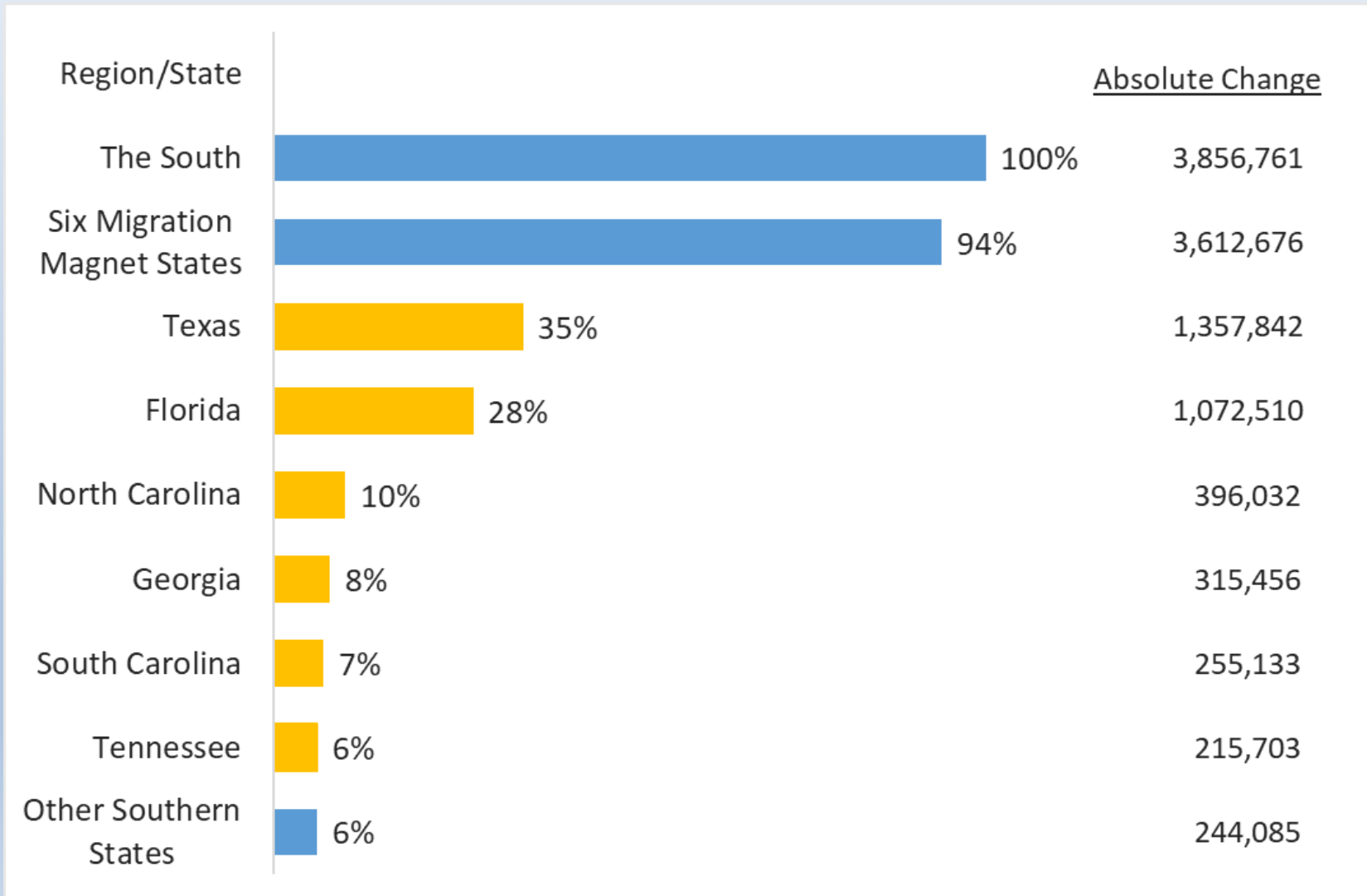
By the Numbers

April 1, 2020 – July 1, 2025

Cumulative Population Change by Region, April 1, 2020 to July 1, 2025



State Shares of South's Net Growth, April 1, 2020 to July 1, 2023



Absolute & Percent Population Change

April 1, 2020-July 1, 2025

Area	Total Population 2025	Absolute Population Change 2020-2025	Percent Population Change 2020-2025
United States	341,784,857	10,268,744	3.1
Northeast	58,042,064	424,504	0.7
Midwest	69,762,666	763,204	1.1
South	133,833,983	7,552,378	6.0
West	80,146,154	1,528,668	1.9
North Carolina	11,197,968	756,576	7.2

Components of Population Change, April 1, 2020-July 1, 2025

Area	Absolute Population Change	Natural Change	Net Migration
U.S.	10,268,744	1,939,907	8,328,837
Northeast	424,494	158,161	287,757
Midwest	763,204	110,704	642,234
South	7,552,378	783,438	6,741,875
West	1,528,668	887,604	656,971
North Carolina	756,576	48,219	708,901

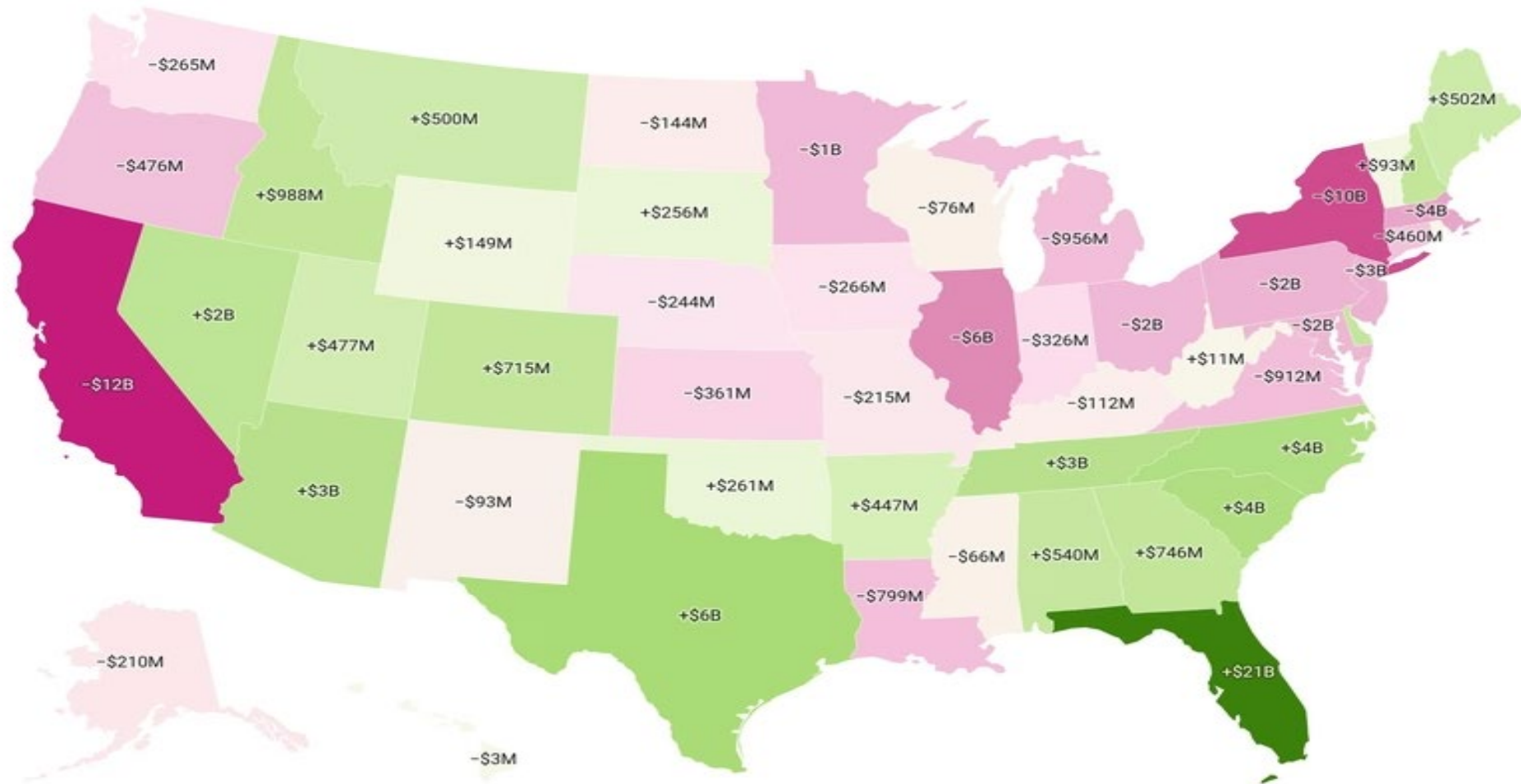
Sources of Migration, April 1, 2020 – July 1, 2025

Area	Total Migrants	International Migrants	Domestic Migrants
United States	8,328,837	8,328,837	X
Northeast	287,757	1,792,061	-1,504,304
Midwest	642,234	1,154,999	-512,765
South	6,741,875	3,584,350	3,157,525
West	656,971	1,797,427	-1,140,456
North Carolina	708,901	231,980	476,921

Net Exporters & Net Importers of Population, April 1, 2020 – July 1, 2022

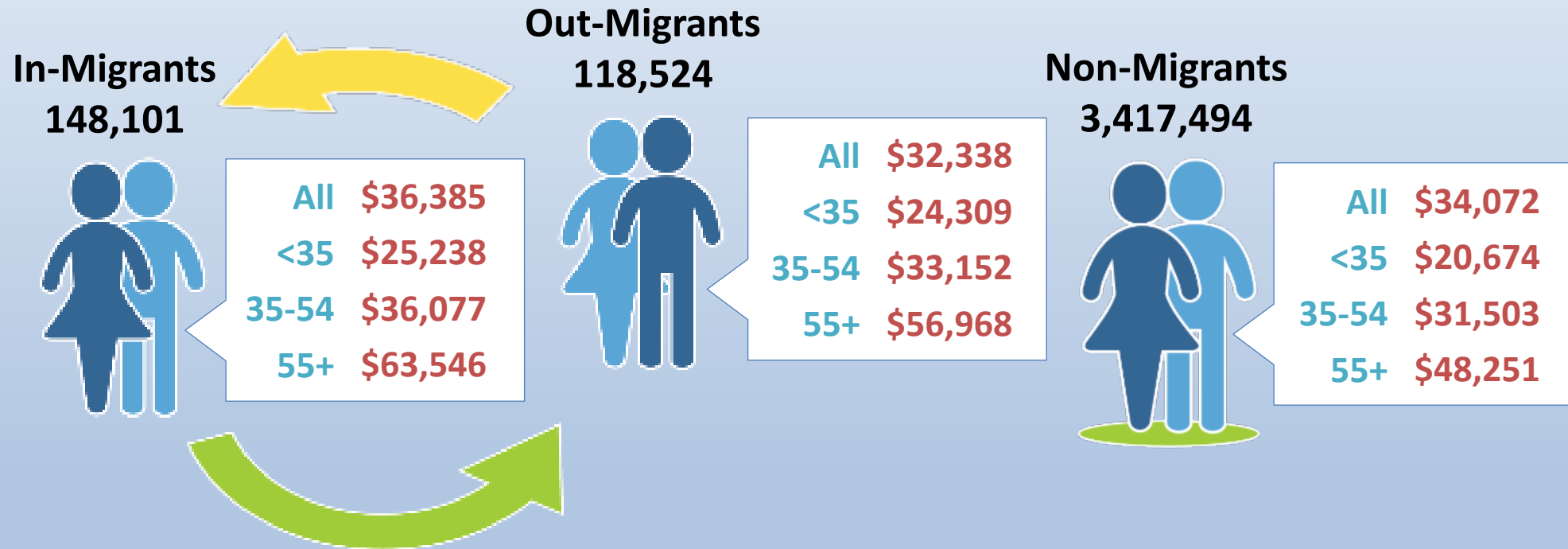
Net Out-Migration		Net In-Migration			
Total Migration	Migrants/Day	Top Origin States	Top Destination States	Migrants/Day	Total Migration
-699,904	-864	California	Florida	985	797,809
-556,885	-687	New York	Texas	789	639,314
-238,576	-294	Illinois	North Carolina	307	248,898
-68,797	-85	Louisiana	Arizona	263	212,851
-52,712	-65	New Jersey	South Carolina	223	180,965
-49,603	-61	Massachusetts	Georgia	205	166,266
-34,987	-43	Maryland	Tennessee	195	157,821
-21,731	-27	Hawaii	Idaho	113	91,246
-19,856	-24	Washington DC	Alabama	89	71,884
-17,365	-21	Minnesota	Nevada	88	70,228
-16,923	-21	Michigan	Oklahoma	80	64,907
			Utah	67	54,712
			Indiana	55	44,951
			Washington	55	44,196
			Arkansas	53	42,809
			Montana	51	41,598

Post Pandemic Wealth Migration



Annual change in adjusted gross income due to inter-state moves, 2023
Map: Realtor.com • Source: IRS • Created with Datawrapper

Per Capita Adjusted Gross Income (AGI) of North Carolina In-Migrants, Out-Migrants and Non-Migrants by Age, 2017-2018



Housing Affordability Crisis



Two 'colorful' Demographic Processes are Drivers of Change

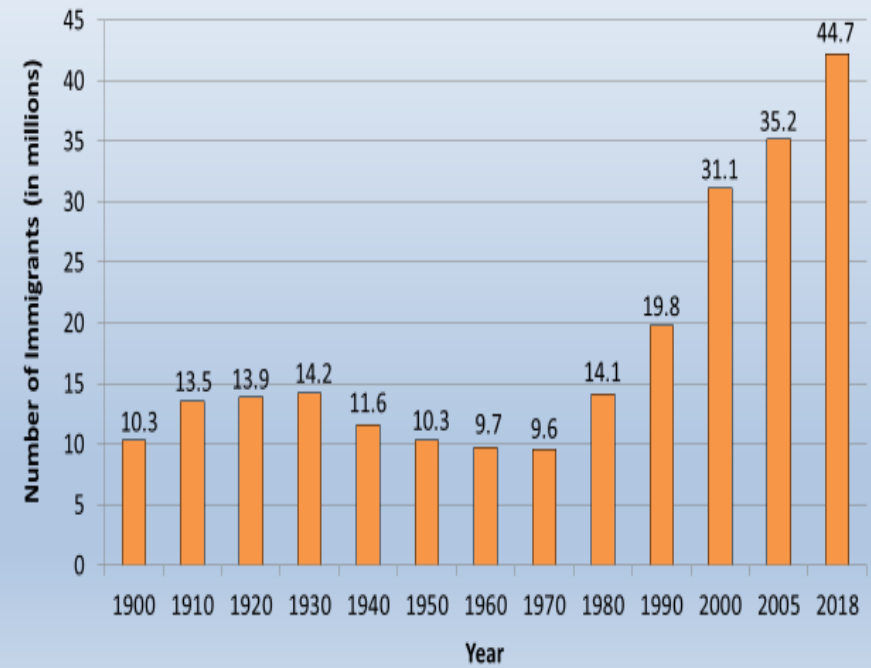
***Browning and
Graying of America!***



The “Browning” of America

Immigration-Driven Population Change

U.S. Immigrant Population, 1900-2018



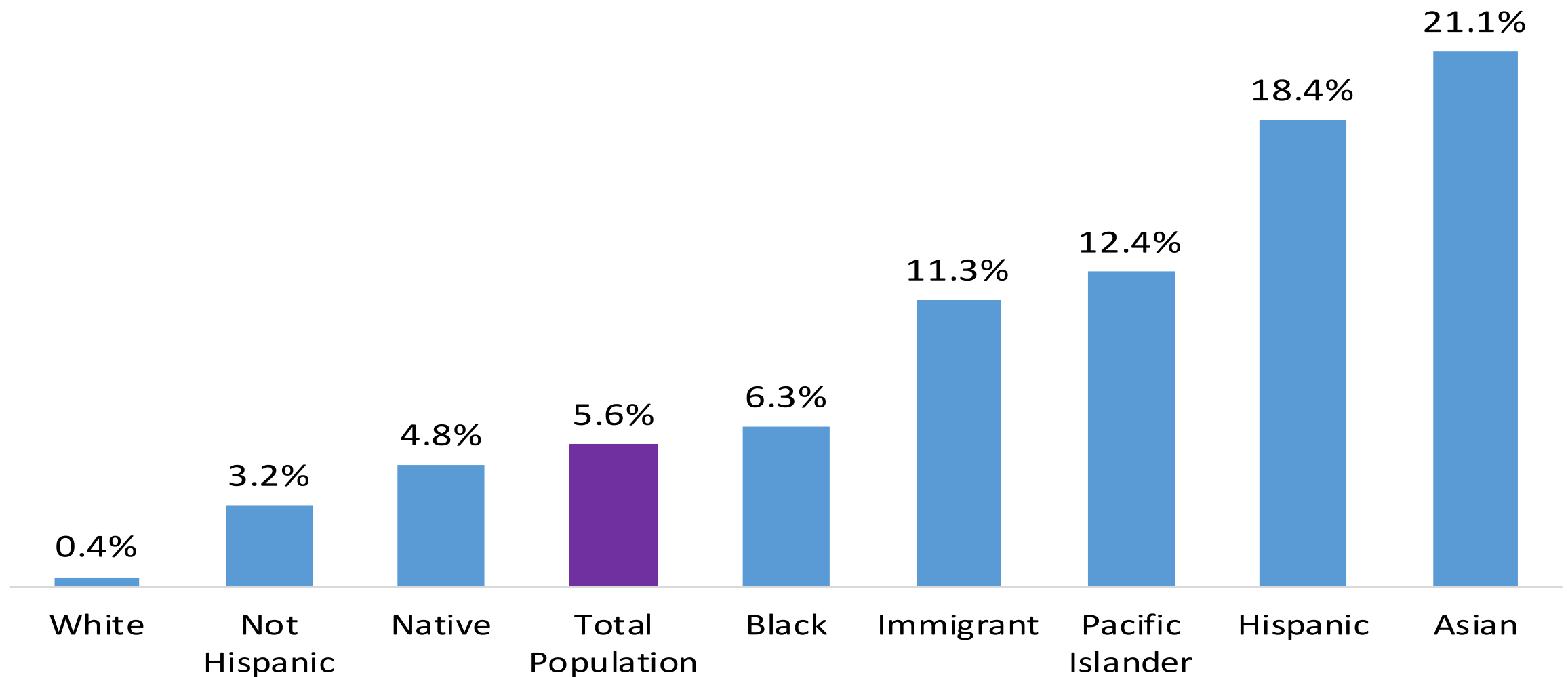
U.S. Foreign Born Population by Race/Ethnicity, 2018

Race/Ethnicity	Foreign Population	Share of Total (%)
Total	44,728,721	100.0
Hispanic	19,814,823	44.3
White Alone, not Hispanic	7,916,984	17.7
Black Alone, not Hispanic	4,249,228	9.5
Asian Alone, not Hispanic	12,121,483	27.1
Other Alone, not Hispanic	626,203	1.4

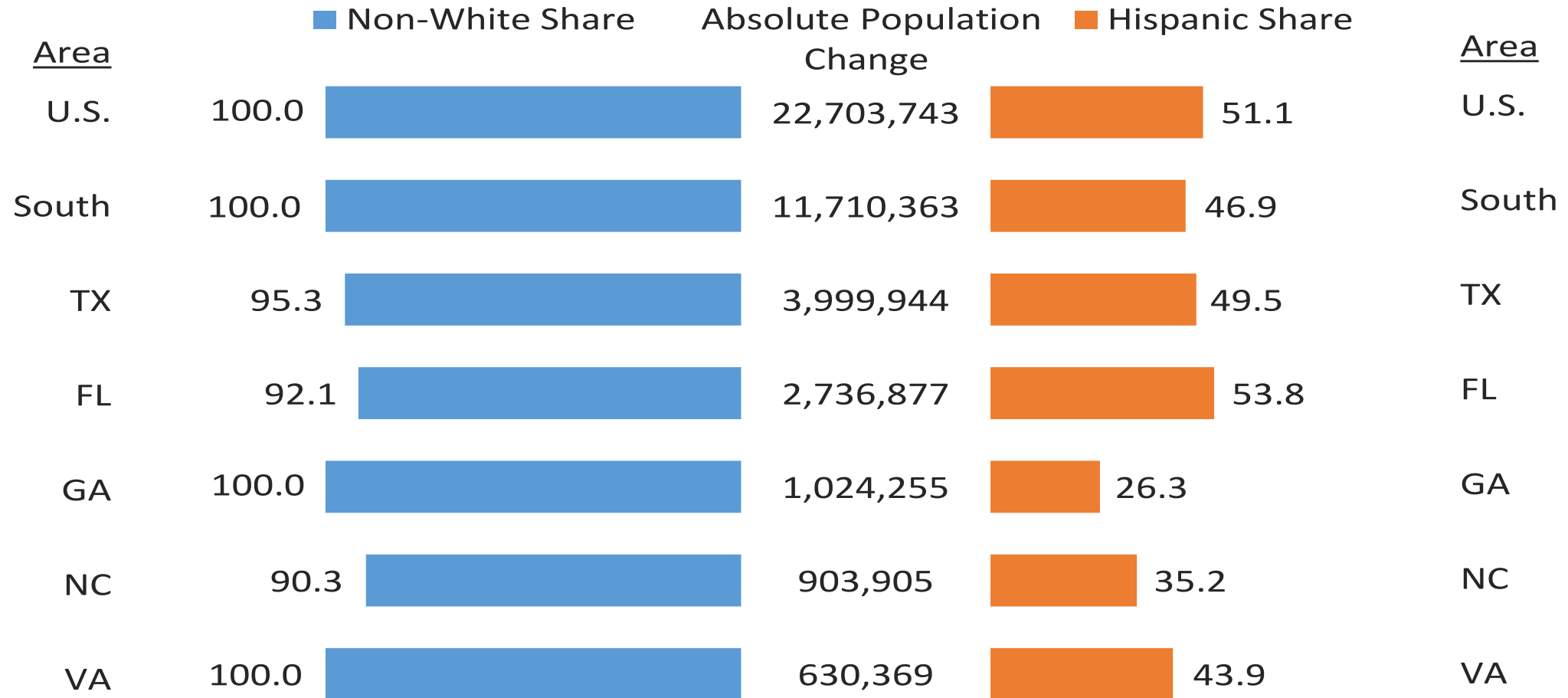
U.S. Population Change by Race and Ethnicity, 2000-2010

Race	2010 Population	Absolute Change 2000 – 2010	Percentage Change 2000 - 2010
Total	308,745,538	27,323,632	9.7%
Non-Hispanic	258,267,944	12,151,856	4.9%
White	196,817,552	2,264,778	1.2%
Black	37,685,848	3,738,011	11.0%
AI/AN	2,247,098	178,215	8.6%
Asian	14,465,124	4,341,955	42.9%
NH/PI	481,576	128,067	36.2%
2 or More Races	5,966,481	1,364,335	29.6%
Hispanic	50,477,594	15,171,776	43.0%

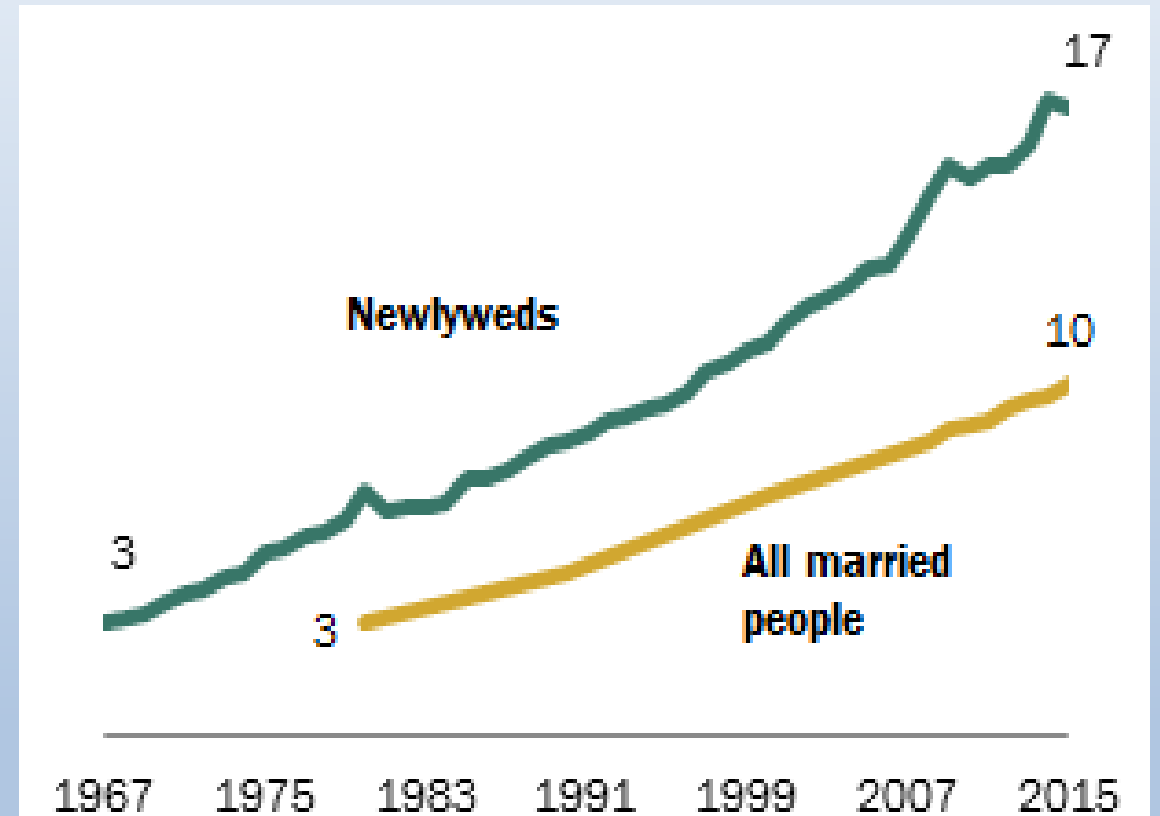
U.S. Population Growth by Nativity, Race, and Ethnicity, 2010-2017



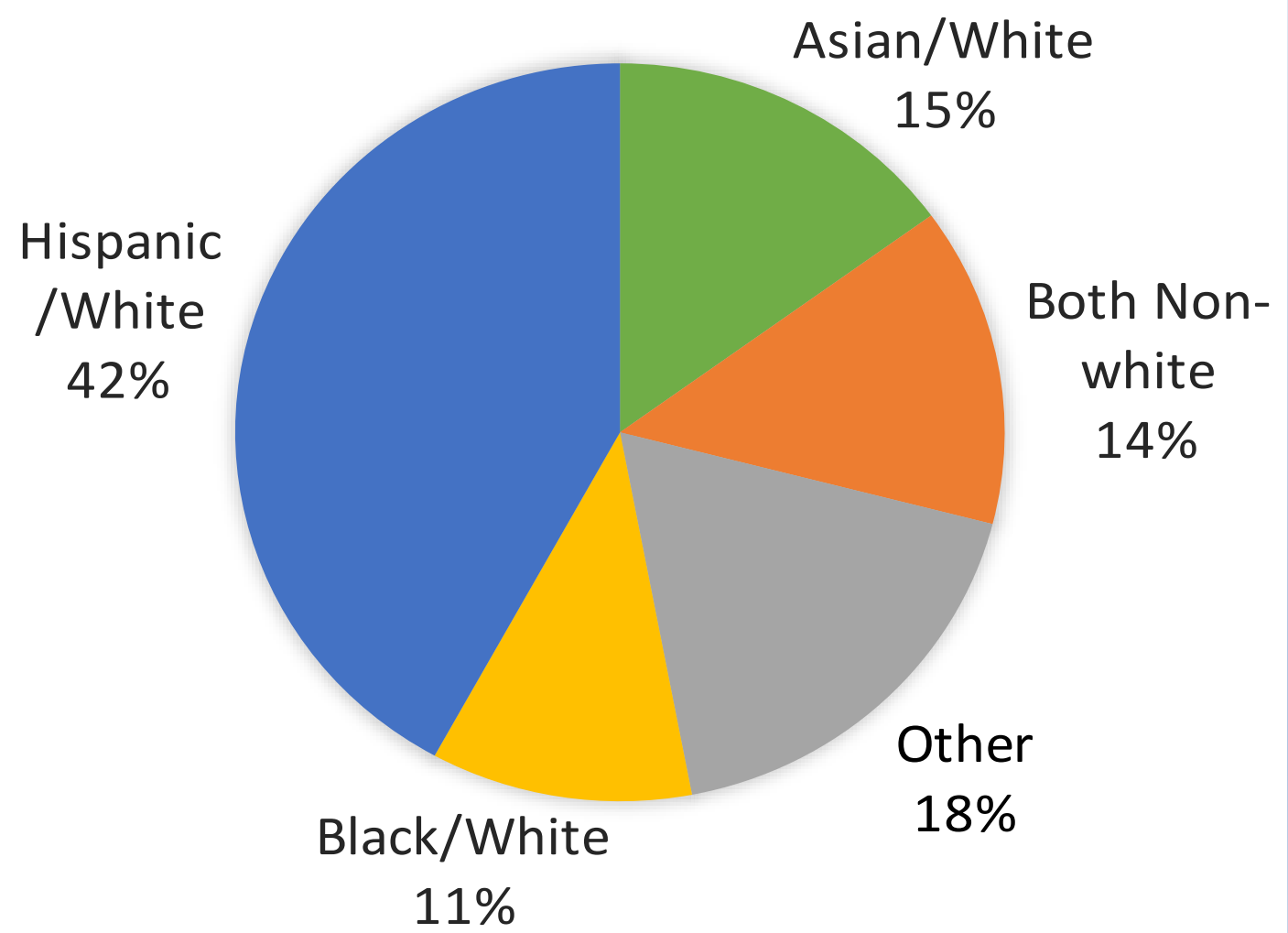
Non-White and Hispanic Shares of Population Growth, 2010-2020



Intermarriage in the U.S., 1967-2015



Intermarriage Types - Newly Married Couples in 2015



Multi-Racial Population Growing Rapidly

- *Increased by 276% between 2010 (9 million) and 2020 (33.8 million).*



The “Graying” of America

The Silver Tsunami is about to Hit!

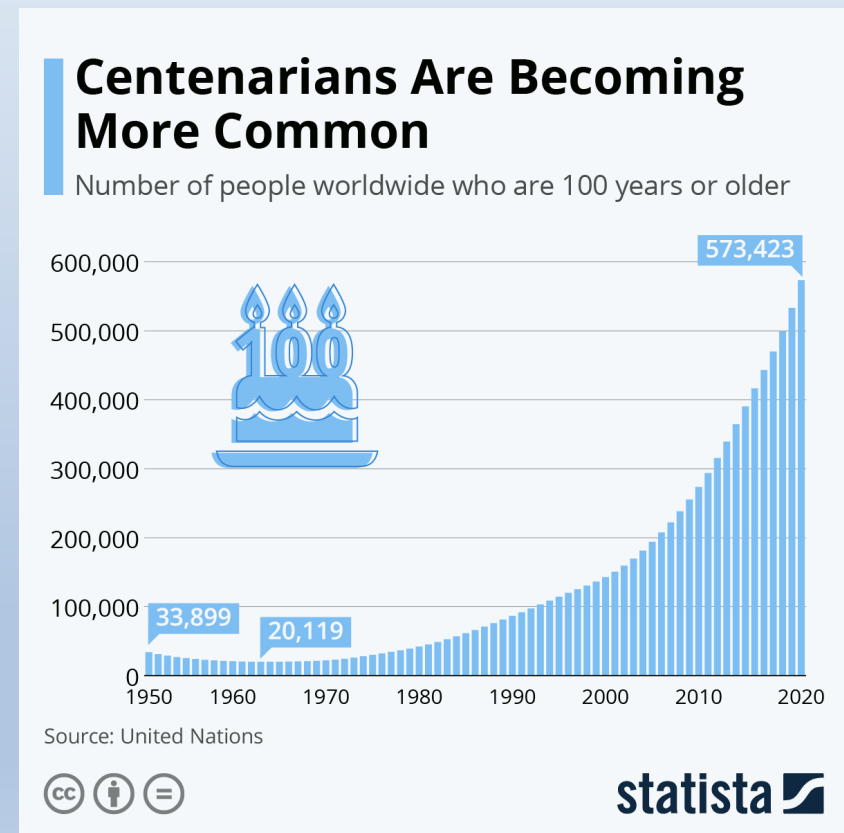


U.S. Life Expectancy at Birth

YEAR	AGE
1900	47.3
1930	59.7
1960	69.7
1997	76.5
2007	77.9
2010	78.3
2030	101.0

Centenarians in the U.S. & Worldwide

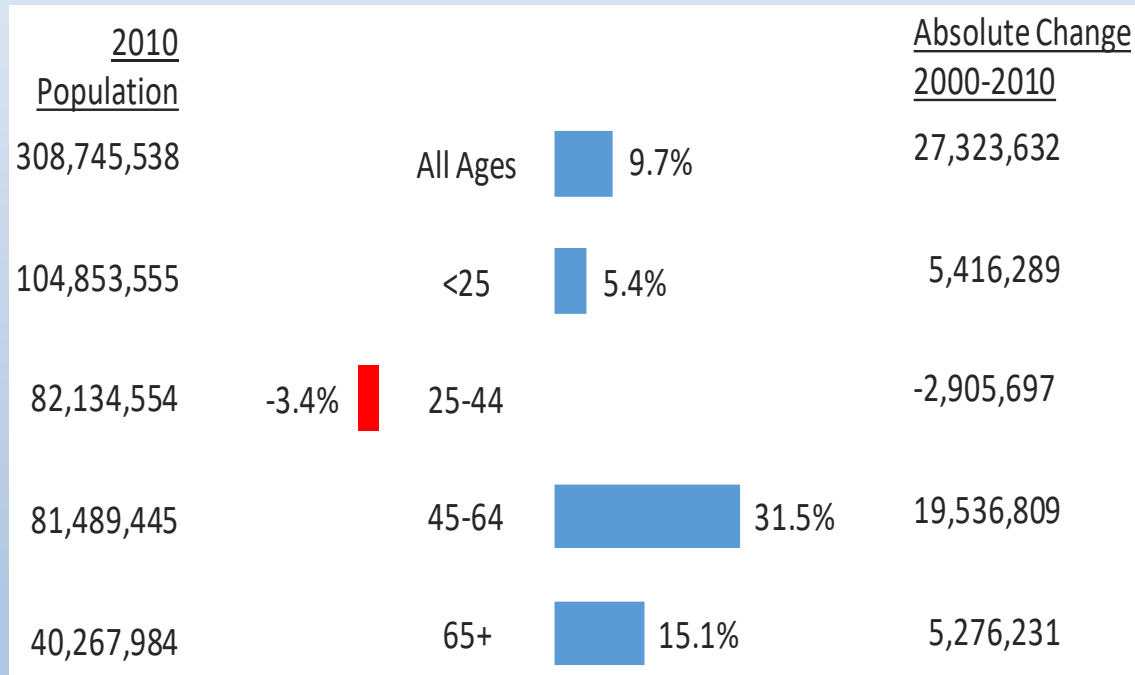
Year	Number
1950	2,300
2010	79,000
2016	82,000
2060	589,000



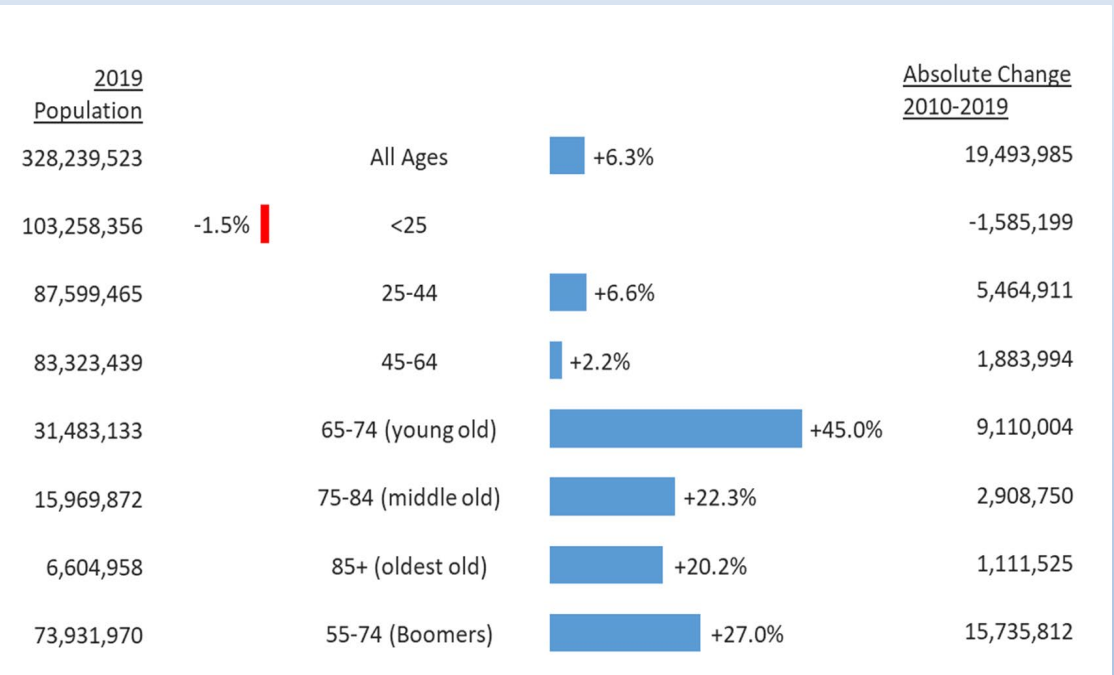
Source: <https://www.statista.com/statistics/996619/number-centenarians-us/>

U.S. Population Change by Age

2000-2010



2010-2019



Greying of US Population

2010-2020

Age	2020 Population	Absolute Change	Percent Change
All Ages	331,449,520	22,703,982	7.4
<18	73,569,941	-611,526	-0.8
18-64	203,349,346	9,053,259	4.6
65+	54,530,233	14,262,249	35.4

2020-2024

Age	2024 Population	Absolute Change	Percent Change
All Ages	340,110,988	8,595,252	2.6
<18	73,132,720	-1,293,422	-1.7
18-64	205,798,350	2,864,775	1.4
65+	61,179,918	7,023,899	13.0

Graying of NC Population

2010-2020

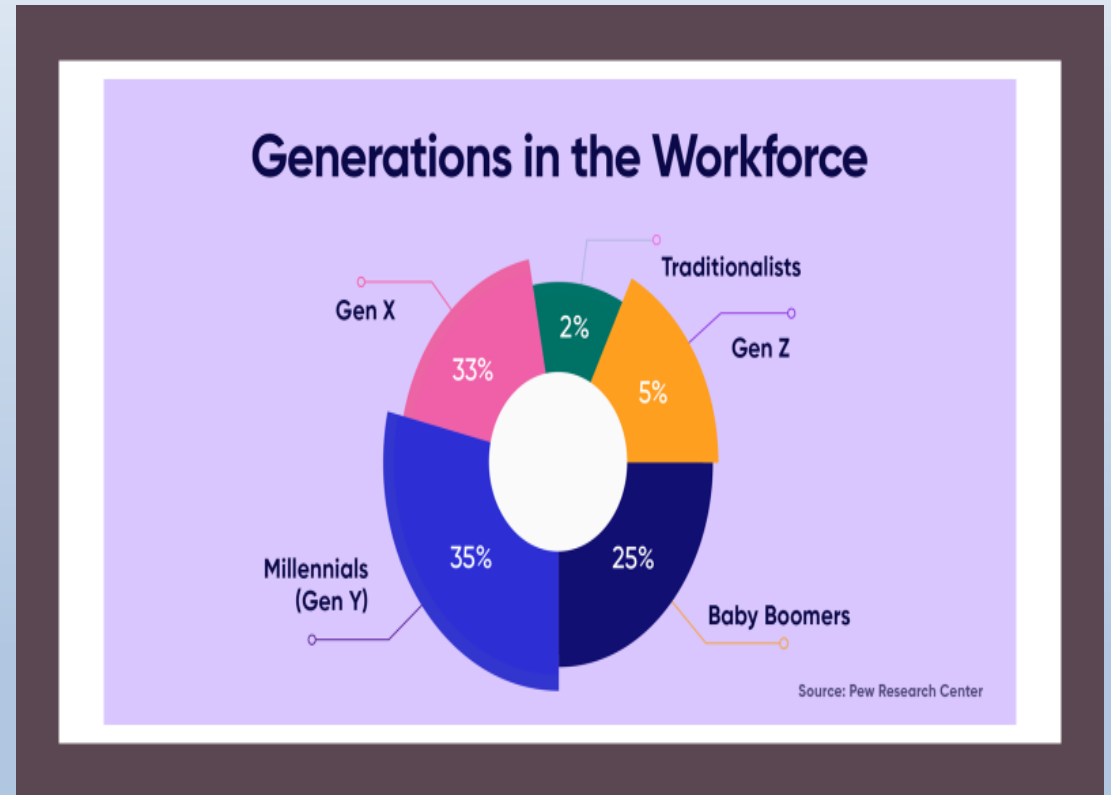
Age	2020 Population	Absolute Change	Percent Change
All Ages	10,439,414	903,931	9.5
<18	2,282,578	943	0.04
18-64	6,420,705	400,936	6.6
65+	1,736,131	502,052	40.7

2020-2024

Age	2024 Population	Absolute Change	Percent Change
All Ages	11,046,024	604,525	5.8
<18	2,360,302	39,332	1.7
18-64	6,711,653	306,649	4.8
65+	1,974,069	258,544	15.1

The Multi-Generational Workforce

Generation	Birth Years
Pre-Boomers	1925-1945
Boomers	1946-1964
Generation X	1965-1976
Generation Y (aka Millennials)	1977-1995
Generation Z	1996-2015



Succession Planning and Accommodations for Elder Care

***Organizational Game
Changers!***



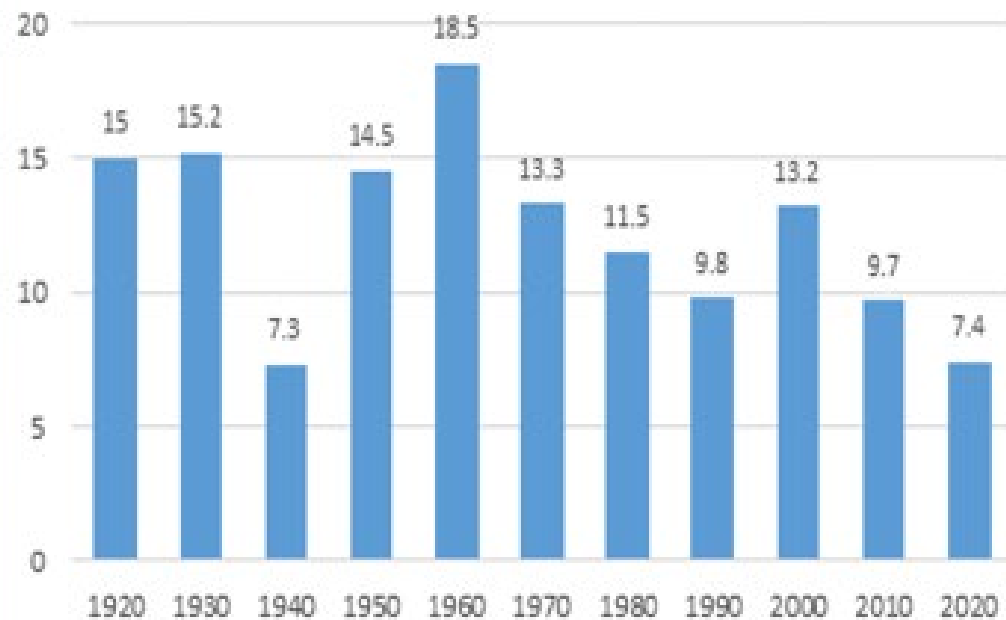
Masked Demographic Disruptions



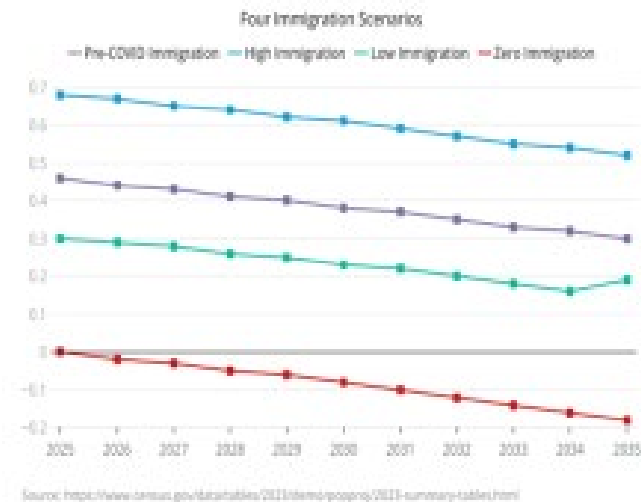
**Slowing Total Growth &
Constraints on International
Migration**

Slowing Total Population Growth

Percent Increase in U.S. Population, 1920-2020



Annual Percent Change in U.S. Total Population, 2025-2035



International Migration as a Share of Annual U.S. Population Change, 2020-2025

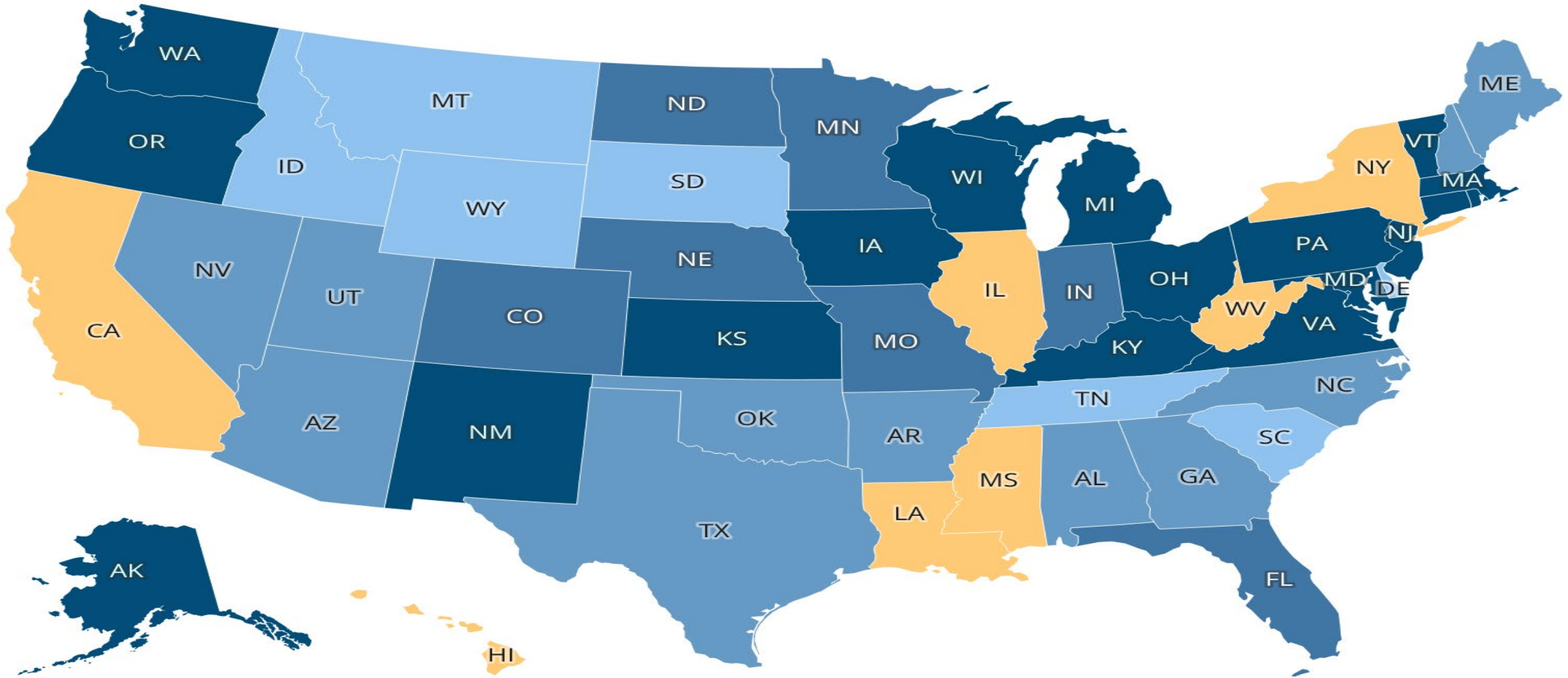
Total Population Change

International Migration

Absolute Number	Percent Change	Year	Share of Population Change	Absolute Number
522,040	0.1%	2020-2021	72%	376,004
1,917,561	0.6%	2021-2022	88%	1,693,535
2,788,910	0.8%	2022-2023	82%	2,294,299
3,304,757	1.0%	2023-2024	84%	2,786,119
1,781,061	0.5%	2024-2025	71%	1,262,202
10,268,744	3.1%	2020-2025	81%	8,328,837

Source: American Community Survey

International Migration as Share of Absolute Population Growth by State, 2020-2025



Share of Absolute Growth

80% or more 50% - 79% 30% - 49% Less than 30% Population Loss

NC International Migration as Percent of Absolute Population Change, 2020-2024

State/County	Percent Due to International Migration	Absolute Population Change
North Carolina	30.1%	604,525
Cumberland	100.0%	3,700
Orange	96.9%	4,170
Durham	79.6%	18,765
Guilford	73.5%	17,574
Duplin	65.7%	1,830
Mecklenburg	57.5%	90,750
Robeson	56.3%	2,100
Forsyth	39.1%	15,537
Buncombe	33.4%	9,785
Wake	32.1%	103,092

Source: American Community Survey

**Non-Hispanic White
Population Absolute Decline**

Absolute & Percent Change in U.S. White Population by Region, 2010-2020

Area	2020 White Population	Absolute Change in White Population 2010-2020	Percent Change in White Population 2010-2020
United States	196,697,647	-5,119,905	-2.6
Northeast	35,752,998	-2,255,096	-5.9
Midwest	50,082,552	-2,014,081	-3.9
South	65,754,358	-1,229,817	-1.8
West	37,468,662	-537,701	-1.4

U.S. Race/Ethnic Change

2010-2020

Race/Ethnicity	2020 Population	Absolute Change	Percent Change
All Races	331,449,281	22,703,743	7.4
Not Hispanic	269,369,237	11,101,293	4.3
White	191,697,647	-5,119,905	-2.6
Black	39,940,338	2,254,490	6.0
AI/AN	2,251,599	4,601	0.2
Asian	19,618,719	5,153,595	35.6
NH/PI	622,018	140,442	29.2
2 or more races	13,548,983	7,582,502	127.0
Hispanic	62,080,044	11,602,450	23.0

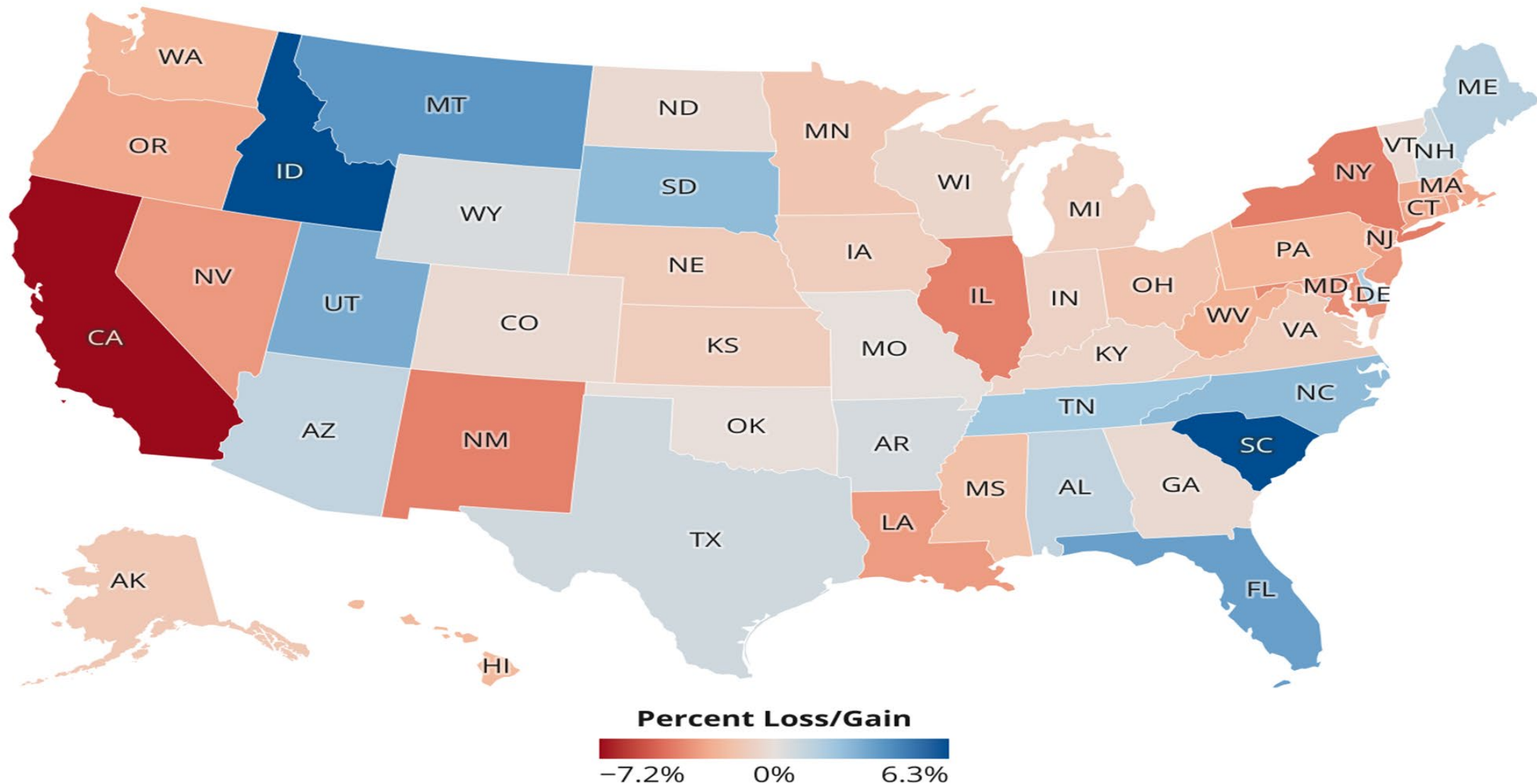
2020-2024

Race/Ethnicity	2024 Population	Absolute Change	Percent Change
All Races	340,110,988	8,595,252	2.6
Not Hispanic	272,024,835	2,584,260	0.9
White	195,433,224	-2,145,944	-1.1
Black	42,951,595	1,235,587	3.0
AI/AN	2,442,428	32,715	1.4
Asian	22,080,844	2,541,047	13.0
NH/PI	674,821	56,909	9.2
2 or more races	8,441,923	863,946	11.4
Hispanic	68,086,153	6,010,992	9.7

States Losing and Gaining White Population, 2020-2024



States Losing and Gaining White Population, 2020-2024



DECLINING FERTILITY

Key Drivers of Fertility Declines

Increasing Labor Force Participation & Career Orientation of Women

Women delaying childbearing

Some women opting not to have children—voluntary childlessness.

Women aging out of the childbearing years

Other Contributors to Declining Fertility

Worldwide decline in the male sperm count?

Increase in the vasectomy rate among privately insured men aged 18-64 in the U.S. between 2014 and 2021.

Vasectomy rate increase greatest among men with no children (61%), with a wife of advanced maternal age (40.8%), who were single (40.6%), and aged 18-24 (36.7%).

Regionally, absolute & relative increases in vasectomies more likely in rural geographies than urban geographies, except in the Northeast.

Source: [Szalinski, 2023](#); [Huang, Hyman & Raheem, 2023](#).

Rise in Permanent Contraception Post Dobbs Decision

Among young adults (19-26):

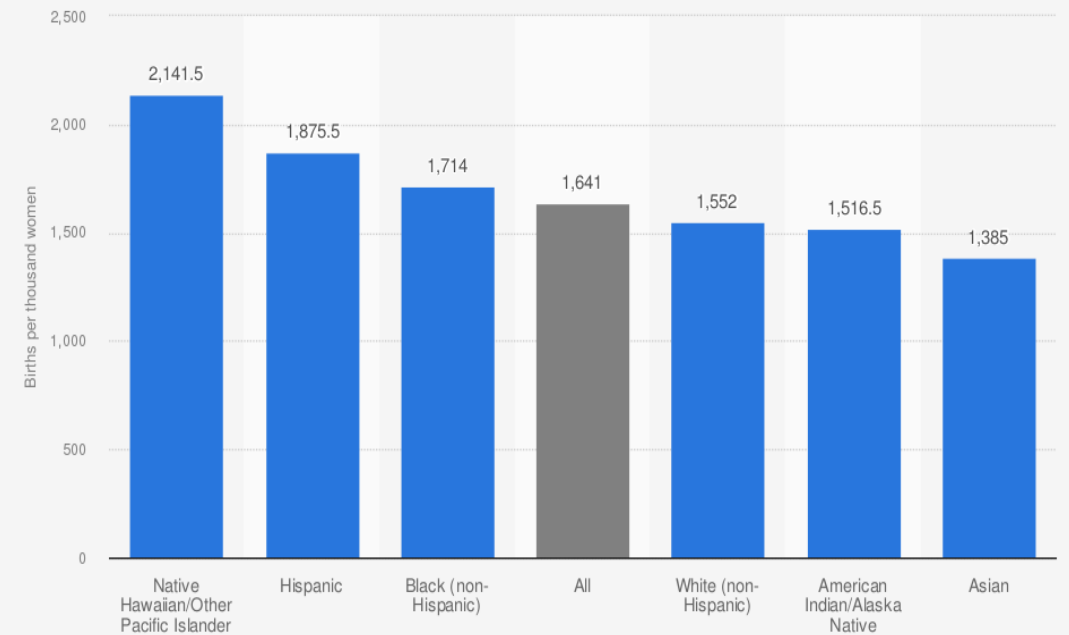
- 70% increase in tubal sterilizations among biological females between May 2022 and August 2022
- 95% increase in vasectomies among biological males during this period
- Permanent sterilizations reportedly among young adults living in states more likely to ban abortions.

Source: <https://publichealth.gwu.edu/study-reveals-rising-interest-permanent-contraception-after-roe-v-wade-was-overturned>

Declining Fertility



Total fertility rate in the United States in 2020, by ethnicity of mother (births per 1,000 women)



Source
CDC
© Statista 2023

Additional Information:
United States; CDC; NCHS (NVSS); 2020

Absolute & Percent Change in Births by Age of Mother, 2022-2023

Age	2023 Births	Absolute Change 2022-2023	Percent Change 2022-2023
All Ages	3,591,328	-76,430	-2.1
10-14	11,763	-62	-3.4
15-19	140,801	-2,988	-2.1
20-24	616,139	-22,546	-3.5
25-29	985,309	-28,108	-2.8
30-34	1,096,696	-22,091	-2.0
35-39	603,798	-2,800	-0.5
40-44	136,096	1,981	1.5
45-54	10,726	184	1.7
Source: Hamilton, Martin, & Osterman, 2024			

Absolute & Percent Change in Births by Race/Ethnicity, 2022-2023

Race/ Ethnicity	2023 Births	Absolute Change	Percent Change
All Races	3,591,328	-76,430	-2.1
American Indian/Alaskan Native	24,479	-1,247	-4.8
Asian	215,599	-3,395	-1.5
Black	490,667	-20,772	-4.1
Native Hawaiian/Pacific Islander	10,096	-26	-0.3
White	1,783,962	-56,777	-30.7
Hispanic	943,957	6,536	0.7
Source: Hamilton, Martin, & Osterman, 2024			

US & NC Population Change by Age, 2020-2024

United States

Age	2024 Population	Absolute Change	Percent Change
All Ages	340,110,988	8,595,252	2.6
Pre-school age (<5)	18,599,314	-803,466	-4.1
School age (5-17)	54,533,406	-489,956	-0.9
Working age (18-64)	205,798,350	2,864,775	1.4
Older adults (65+)	61,179,918	7,023,899	13.0

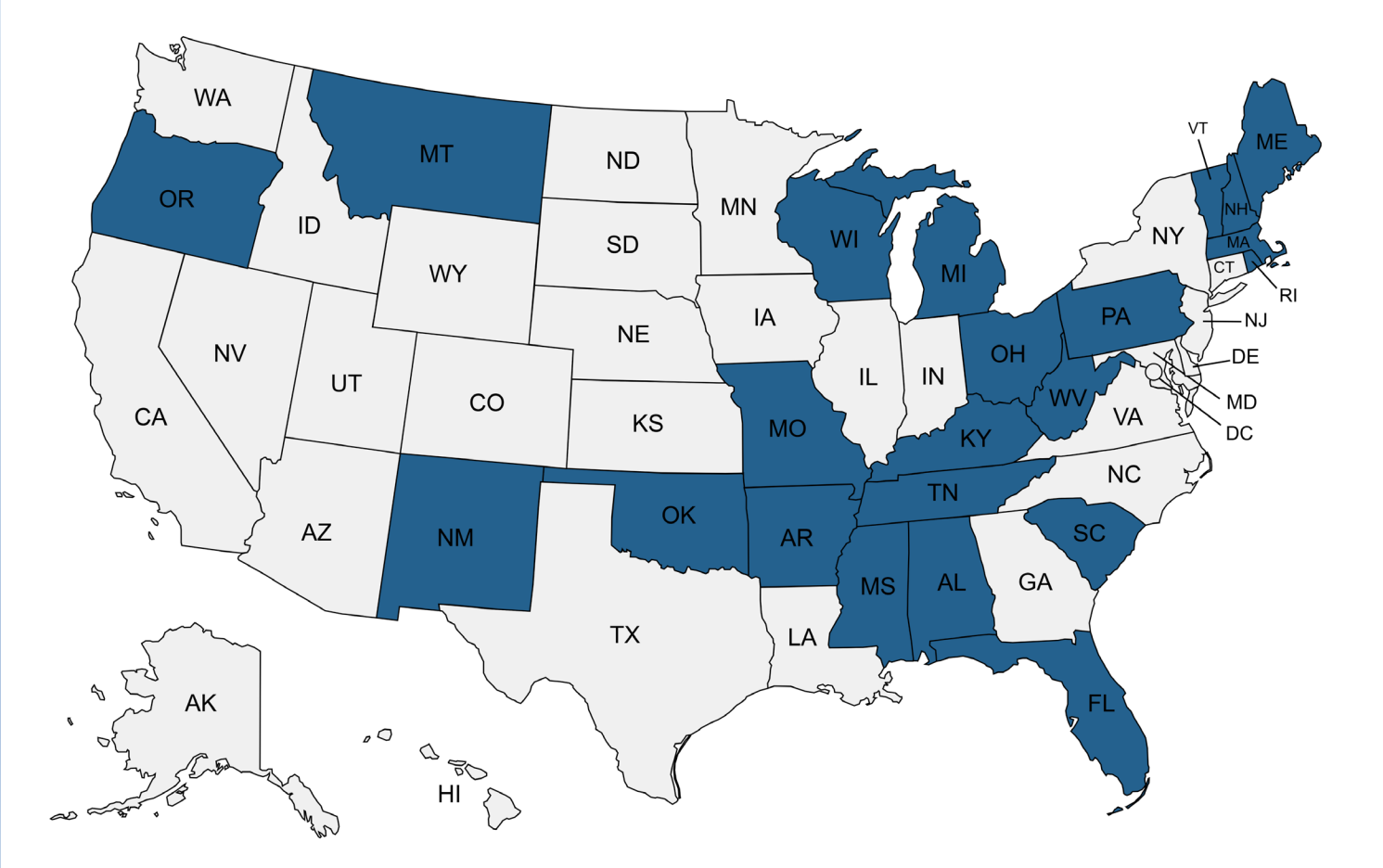
Source: ACS

North Carolina

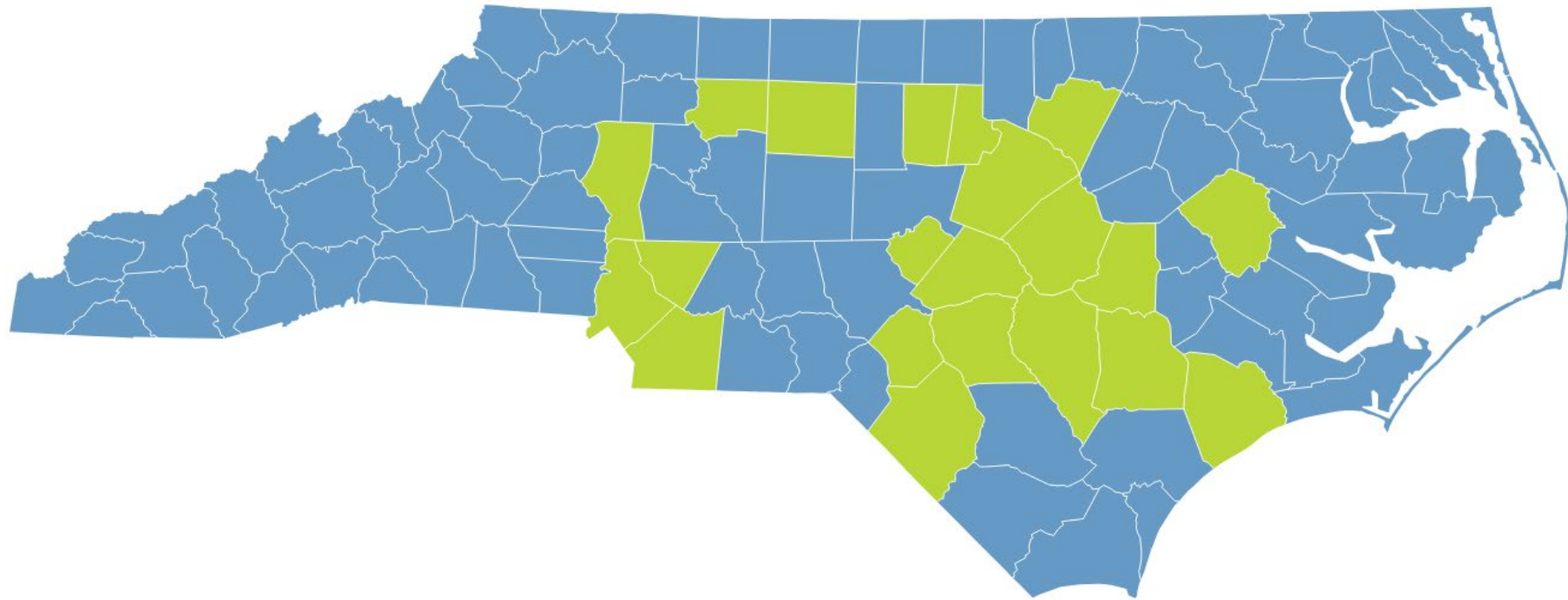
Age	2024 Population	Absolute Change	Percent Change
All Ages	11,046,024	604,525	5.8
Pre-school age (<5)	617,555	17,801	3.0
School age (5-17)	1,742,747	21,531	1.2
Working age (18-64)	6,711,653	306,649	4.8
Older Adults (65+)	1,974,069	258,544	15.1

Source: ACS

States Where Deaths Exceeded Births, 2020-2025



North Carolina Natural Population Change by County, 2020-2025



- Counties Experiencing More Births than Deaths
- Counties Experiencing More Deaths than Births

Source: U.S. Census Bureau

The Plight of Men

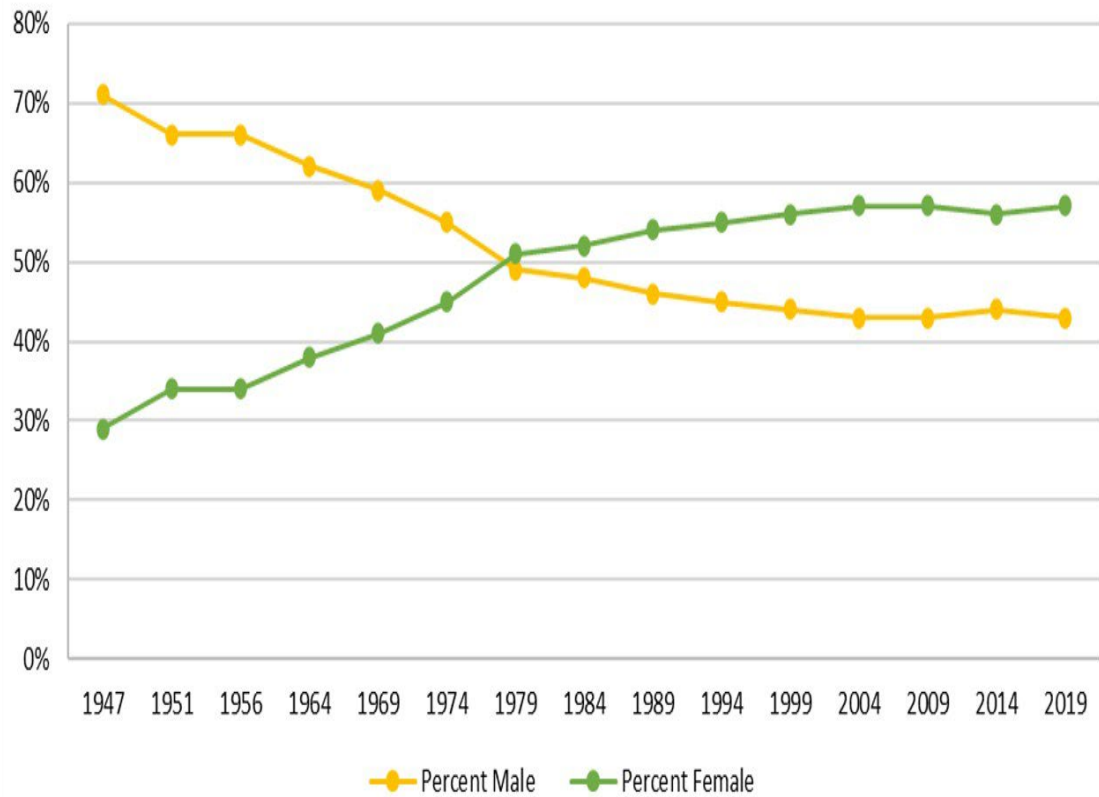
Selective withdrawal from the
labor market

Skills mismatches, disabilities,
incarceration

Median wage decline

Sex ratio imbalance in college
enrollment

College Enrollment in the U.S. by Gender, Selected Years, 1947-2019



A Generation of American Men Give Up on College: 'I Just Feel Lost'

The number of men enrolled at two- and four-year colleges has fallen behind women by record levels, in a widening education gap across the U.S.

Daniel Briles in his room at home in Red Wing, Minn. TIM GRUBER FOR THE WALL STREET JOURNAL

By [Douglas Belkin](#)
Sept. 6, 2021 1:12 pm ET

Number of Students Enrolled in Post-Secondary Institutions by Region and Gender, 2023

Region	Total Enrollment	Male Enrollment	Percent Male
All Regions	19,427,907	8,216,910	42
New England	1,105,112	450,720	41
Mid-East	2,702,522	1,163,211	43
Great Lakes	2,589,208	1,113,793	43
Plains	1,372,898	569,238	41
Southeast	4,636,644	1,914,072	41
Southwest	2,618,608	1,074,532	41
Rocky Mountains	1,030,522	449,440	44
Far West	3,357,254	1,470,887	44
North Carolina	566,112	229,938	41

Number of Degrees Awarded in Post Secondary Institutions by Region and Gender, 2023

Region	Total Degrees Awarded	Female Degrees Awarded	Male Degrees Awarded	Female-Male Absolute Degree Difference	Female/Male Degree Ratio
All Regions	4,737,195	2,840,212	1,896,983	943,229	1.5
New England	277,311	164,597	112,714	51,883	1.5
Mid-East	693,486	412,064	281,422	130,642	1.5
Great Lakes	664,059	390,655	273,404	117,251	1.4
Plains	328,636	199,565	129,071	70,494	1.5
Southeast	1,180,699	710,713	469,986	240,727	1.5
Southwest	608,651	369,733	238,918	130,815	1.5
Rocky Mountains	241,205	146,041	95,164	50,877	1.5
Far West	739,737	445,912	293,825	151,687	1.5
North Carolina	140,338	83,877	56,461	27,416	1.5

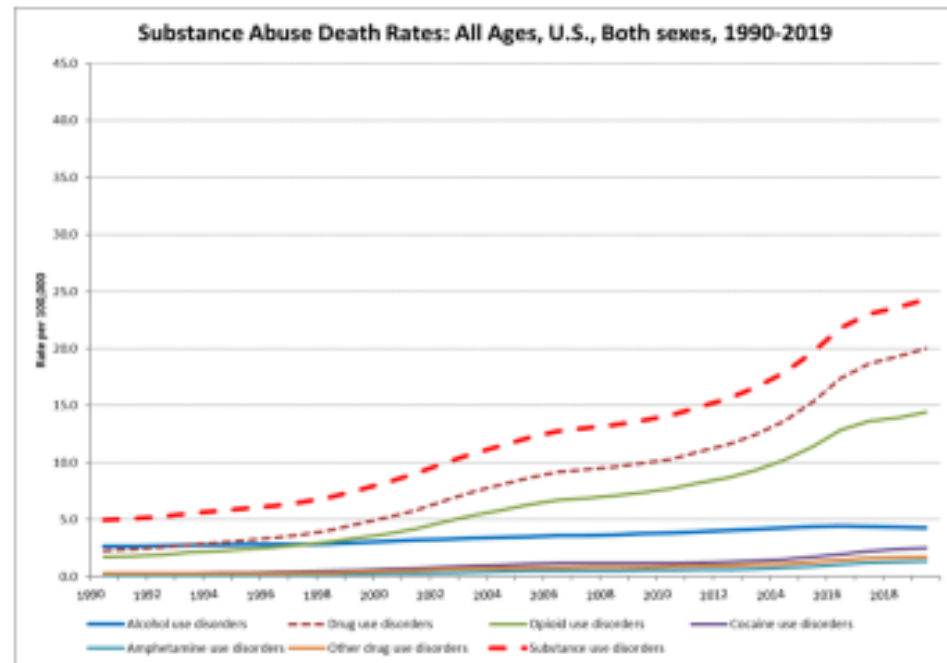
A 3D rendered scene featuring a dark, narrow hallway. The walls and floor are composed of numerous question marks of varying sizes and orientations, creating a sense of depth and complexity. At the far end of the hallway, a bright, glowing light source illuminates the scene, casting long shadows and highlighting the texture of the question marks. The overall atmosphere is one of mystery and uncertainty.

DEATHS OF DESPAIR

Deaths of Despair

Deaths Due to Substance Use Disorders,
1990-2019

Time Period	Absolute Deaths	Mean Deaths	Range of Deaths
1990-1999	158,899	15,899	12,628 - 21,197
2000-2009	339,461	33,746	23,192 - 41,958
2010-2019	613,206	61,206	43,629 - 79,761



Pandemic Deaths of Despair

Drug Overdose Deaths Soar During the Pandemic

- CDC data indicate there were 90,000 drug overdose deaths in 2020, representing a 21,000 or 30% increase over the 2019 death toll.

- Commenting on these recently released statistics, a Stanford University expert on addiction and drug policy is quoted as saying,

It's terrifying. It's the biggest increase in overdose deaths in the history of the United States, it's the worst overdose crisis in the history of the United States, and we're not making progress. It's really overwhelming.

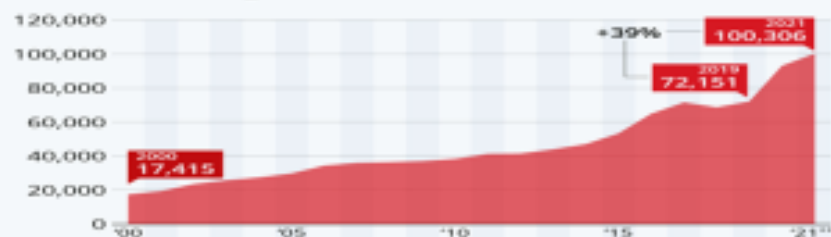
- For far too many individuals struggling with drug addiction, the pandemic-induced forced isolation combined with the shutdown of in-person drug treatment and counseling services proved to be deadly.

- According to the CDC the 2020 casualties brings the total to more than 900,000 overdose deaths since the U.S. drug epidemic began in the late 1990s.



U.S. Drug Overdose Deaths Spike Amid the Pandemic

Number of drug overdose deaths in the United States*



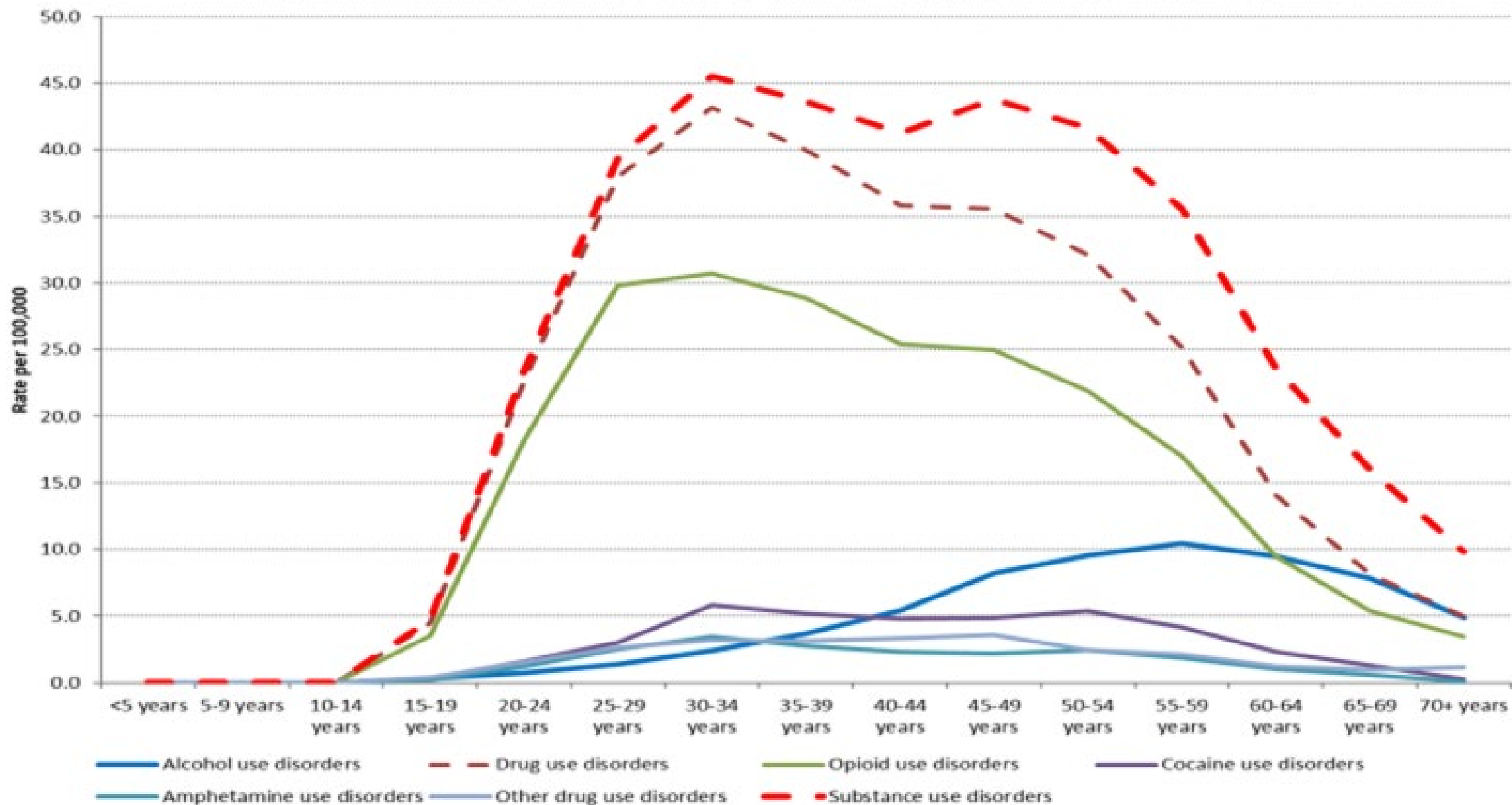
* Estimates for 2020 and 2021 are based on provisional data.
** 2021 estimate refers to 12-month period ending April 2021

Source: Centers for Disease Control and Prevention

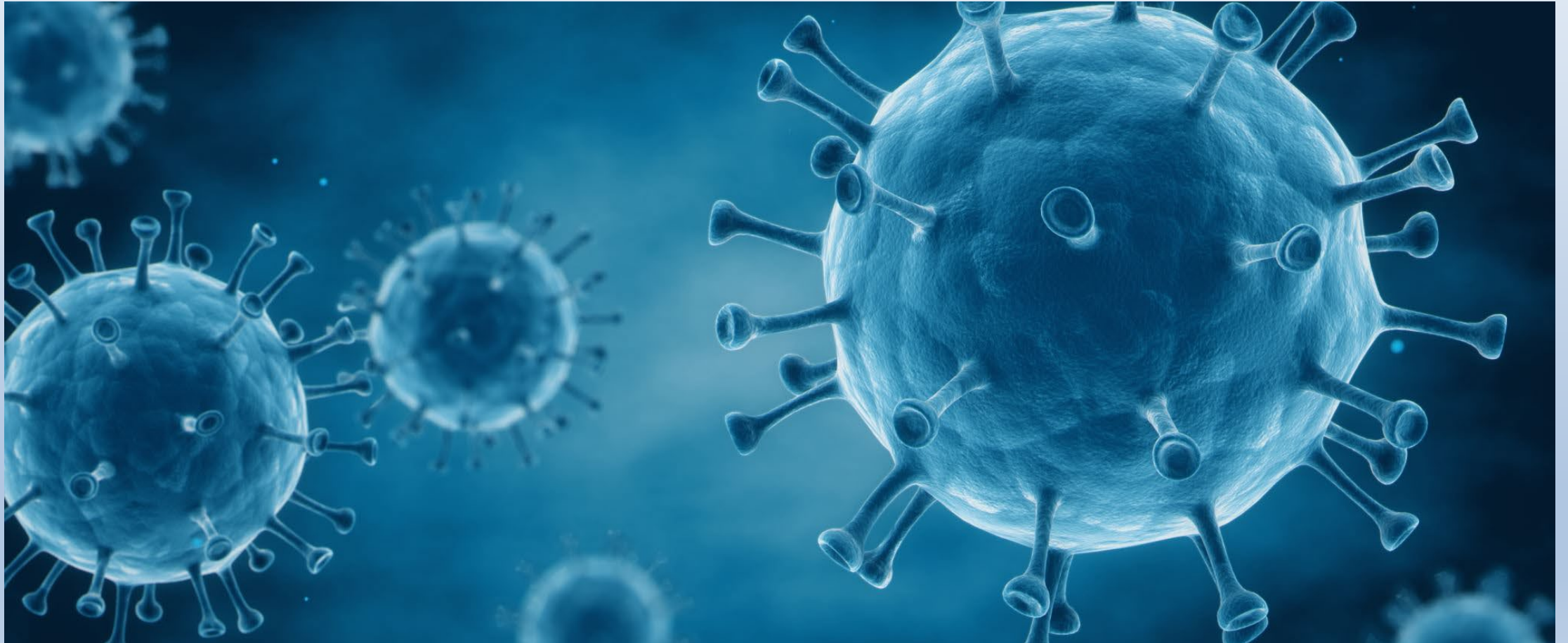


statista

Substance Abuse Death Rates by Age: U.S., Both sexes, 2019



COVID-19 & Other Health Threats



COVID Impacts

1.2 million cumulative COVID Deaths (March 28, 2020 - February 1, 2025)

550,000 U.S. kids orphaned (10 million globally)

2 million women with caregiving responsibilities forced out of the labor market

1.5 million baby boomer males forced into involuntary retirement with a median savings of \$9K (mainly Black men with less than a college degree)

White House Executive Orders



Executive Orders Impacting Communities

- **Immigration**
- **Birth Right Citizenship**
- **Diversity, Equity, & Inclusion (DEI)**
- **Sanctuary Cities (300 jurisdictions)**
- **Paused Infrastructure, Inflation Reduction & Chips Acts Funding**
- **Massive federal lay offs**
- **Scientific Research Funding**





**THE ERA OF 'JOB
HUGGING' IS HERE, AND
IT'S KEEPING YOU IN THAT
AWFUL JOB**

Absolute and Percent Change in U.S. Working Age Population & Their Employment Status Between February and June 2025

Absolute Number (June 2025)	Percent of Working Age Population	Employed for Last 7 Days	Percent Change (February-June 2025)	Absolute Change February-June 2025)
147,449,048	56.6	Yes	-8.7	-13,981,266
112,856,729	43.4	No	13.7	13,602,300

Source: HTOPS, February & June Waves, 2025

Absolute and Percent Change in the U.S. Labor Underutilization Rate by Race, 2024-2025

Race/ Ethnicity	2025 Rate	Absolute Change 2024-2025	Percent Change 2024-2025
All	8.0	0.5	6.7
Hispanic	11.0	0.4	3.8
White	6.3	0.4	6.8
Black	11.8	1.6	15.7
Asian	6.3	0.1	1.6
Other	11.6	0.2	1.7

Source: BLS.

Iceberg Demographic Challenges

Insights from the Census Bureau's Household Trends & Outlook Pulse Survey (HTOPS)

- **Designed to efficiently collect data on emerging social and economic matters facing U.S. households.**



HTOPS Person-Level Ice-berg Demographic Indicators

<ul style="list-style-type: none">• Physical Limitations	<ul style="list-style-type: none">• Cognitive Impairments	<ul style="list-style-type: none">• Other Challenges
<ul style="list-style-type: none">• Seeing• Hearing• Mobility	<ul style="list-style-type: none">• Communication Limitations• Remembering/Concentration Issues• Frequent Anxiety• Frequent Worrying• Lack of Interest in Things• Frequent Depression• Frequent Loneliness	<ul style="list-style-type: none">• Transportation Constraints• Job Loss

HTOPS Household Level Iceberg Demographic Indicators

Economic Insecurities	Housing Insecurities	Caregiving Insecurities
<ul style="list-style-type: none">• Household Job Loss• Difficulty Covering Household Expenses• Food Insecurity• Unable to Pay Energy Bill	<ul style="list-style-type: none">• Kept House at Unsafe Temperature• Behind on Rent• Possible Eviction• Behind on Mortgage• Possible Foreclosure	<ul style="list-style-type: none">• Medication Shortage• Childcare Challenges• Difficulty Accessing Child Mental Health Treatment

Person-Level Iceberg Demographic Indicators by Race/Ethnicity, 2025

Race/Ethnicity	Working Age Population	Seeing Difficulty	Anxiety	Depression	Loneliness
All Races	261,147,106	30.5%	51.7%	37.3%	37.8%
White	156,591,175	29.3%	53.7%	37.8%	35.7%
Hispanic	47,539,158	33.2%	44.3%	35.8%	37.5%
Black	31,457,371	33.7%	45.7%	38.0%	44.1%
Asian	15,945,489	27.2%	49.2%	40.1%	41.2%
Other Race	9,613,323	31.3%	64.5%	57.6%	48.9%

Source: HTOPS, February Wave, 2025.

Household-Level Iceberg Demographic Indicators by Race/Ethnicity, 2025

Race/Ethnicity	Total Households	Difficulty Covering Household Expenses	Food Insecurity	Rent Delinquent	Mortgage Delinquent
All Races	129,564,650	49.4%	31.0%	9.8%	4.0%
White	78,405,597	44.5%	24.5%	4.5%	1.9%
Hispanic	20,907,238	64.2%	46.2%	11.8%	8.7%
Black	17,673,664	56.9%	37.7%	17.4	7.6%
Asian	7,367,975	32.3%	20.6%	6.9%	6.2%
Other	5,210,033	62.3%	43.6%	28.1%	10.9%

Source: HTOPS, February Wave, 2025

Winning the War for Talent

Embrace the Iceberg Model of Diversity



Iceberg Model of Diversity

Visible Diversity Traits

Race/Skin Color

Gender

Visible Disability

Age Group

Physical Attributes

Ethnicity

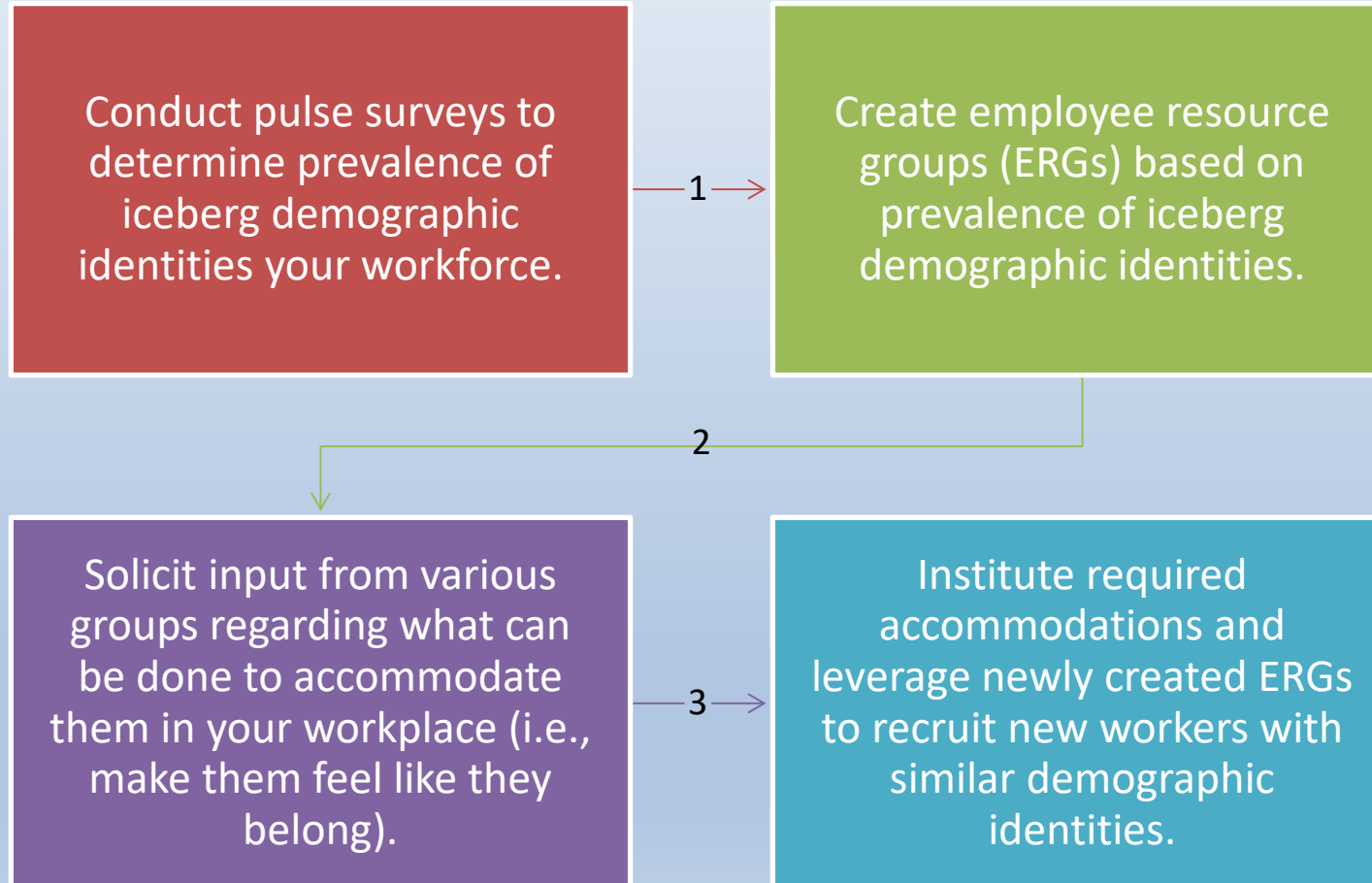
*If all I
know
about you
is what I
can see...*



Invisible Diversity Traits

Level in Organization **Culture** **Marital Status** **Values** **Education** **MBTI**
Religion/Religious Experiences **International Cultural Immersion**
Communication Style **Conflict Style** **Beliefs** **Teaching Style** **Recreational Habits**
IQ **Learning Styles** **Academic Discipline** **Literacy** **Sexual Orientation** **Personality**
Style **Orientation to Time** **Family Relationships** **Orientation to Tasks**
Physical Abilities/Qualities **EQ** **Military Experience** **Socioeconomic Status**
Geographic Background **Work Background** **Smoker/Non-Smoker**
Parental Status **Native Born/Non-Native Born** **Political Ideology** **Thinking Style**

Recommended Strategies



THE END

