

Demographic Research Report for Grace Church's Multi-Site Planting Strategy

This Report Includes:

*Congregational information by zip code
Population Growth analysis by zip code
Churched/Unchurched density by zip code
Data analysis for the purpose of picking a multi-site
Draft recommendations on where to plant the next Grace campus*

Analysis and Report

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***Executive Summary Addendum
for
Demographic Research Report for Grace Church’s Multi-Site Planting Strategy***

Introduction:

In March of 2009, the pastoral staff began to research demographic information that would be helpful in planning a multi-site church campus plant from Grace Church in Chapel Hill. The study was based primarily on criteria found in the book *The Multi-Site Church Revolution*. The goal of the study was to look at three basic sets of criteria (locations of current Grace Church members, most-churched and least-churched zip codes, and fastest and slowest growing zip codes), gather it, and then pray through choosing the best location for a new campus. The study was to be one of many factors into naming a new campus location.

Report Findings:

Based on the criteria the report, Grace Church’s next campus site should be in one of the following Zip Codes/Locations: **27519**/Wake Co./Cary; **27517**/ Orange Co./Chapel Hill; **27617**/ Wake Co./Raleigh; **27560**/ Wake Co./ Morrisville; or **27613**/ Wake Co./ Raleigh.

However, the report also found that the city of Carrboro was the fourth least churched city in our area. Furthermore, the new zip code in Chapel Hill, **27617**, which is immediately adjacent to Carrboro and to the zip code where Grace Church is currently located, **27514**, are among the least churched zip codes in central North Carolina.

Additional Prayer and Discussion:

Confronted with this information the pastoral staff began to pray and seek God about where to go first – Carrboro or Wake County – for a new multi-site campus. The report was presented to the elders and more prayer was given to this issue.

Given a large list of factors, including a strong base of Grace Church membership near Carrboro, the relatively low expense to begin a campus there, the low number of Evangelical churches in the area, and the ability to learn about the challenges of multi-site expansion at a lower risk than trying the same task as a campus 25 miles away, the elders and pastoral staff decided to “nail the short putt” and being looking at a multi-site campus in Carrboro.

Carrboro, Wake County, and Beyond:

Currently the multi-site strategy is deeply tied to the demographic information that follows in this report. The statistics, if they hold, lays out a general plan of multi-site and church planting into the entire Triangle Region for the next 10 to 15 years. This plan will begin with Carrboro and gradually expand into the Wake County region with the goal of affecting a region of nearly 1.5 million people with the Gospel of Jesus Christ.

ORIGINAL REPORT FOLLOWS



Purpose of This Report:

The purpose of this report is to serve as a statistical underpinning for choosing a location for the next Grace Church campus. The findings in this report are based primarily on demographic information and objective research. They are useful in identifying the needs of our community and target areas in which to create a new church influence. However, as a “statistical underpinning” they are not intended to replace the guiding of the Holy Spirit, nor the wisdom of the Grace Church leadership. Rather, they are a tool to assist in the effort to join the Spirit’s work in wherever he directs our next move.

Executive Summary:

The following statistical analysis reveals the following key bits of information.

First, Grace Church has its greatest influence upon the Orange and Durham County areas. Its greatest influence is specifically in the Zip Codes immediately adjacent to its current 27514 campus site. Guests from the most adjacent Zip Codes are much more likely to transition to Attendees then to Members that Guests from even just two Zip Codes away.

Second, both the fastest growing and least churched area within the immediate influence of Grace Church is the 540 corridor stretching from Zip Code 27519 to Zip Code 27614.

Third, based on the analysis in this report, which comes primarily from recommendations in *The Multi-Site Church Revolution*, Grace Church’s next campus site should be in one of the following Zip Codes/Locations: **27519**/Wake Co./Cary; **27517**/ Orange Co./Chapel Hill; **27617**/ Wake Co./Raleigh; **27560**/ Wake Co./ Morrisville; or **27613**/ Wake Co./ Raleigh.

Finally, the next step for Grace Church is to prioritize various categories of analysis in order to make a decision either on one of the five Zip Codes above, or another planting location based on a refined set of criteria.

Methodology:

The methodology for this report vary slightly based on which statistical analysis your are looking at. Here is a brief breakdown below.

Zip Code Selection:

The Zip Codes that I selected were based primarily on where Grace Church had a potential influence. Our base Zip Code is 27514 (that is where our building is located), thus we did no analysis on this Zip Code. We then expanded outward in an effort not only to analyze every Zip Code in which a Grace Church member, attendee or guest was from, but also all the Zip Codes that are adjacent to the Zip Codes containing Members and Attendees. This allows us to see the entire potential area of influence Grace Church can have on North Carolina.

Grace Church Analysis:

The Grace Church statistics were compiled using Fellowship One. We searched our database looking for the total number of Members, Attendees, and Guests in each of the Zip Codes selected. There was no effort to purge the database when compiling the numbers; thus, these statistics are as accurate as our current database.

Church Analysis:

The statistics on area churches and the degree to which an area is “churched” or “unchurched” was compiled using Google Maps. In each Zip Code, all the churches located on Google Maps were hand counted and categorized by general church affiliation. This simply compiled the total number of churches, not the size of the church. To determine how “churched” a Zip Code was, the total Zip Code population was divided by the total number of churches in that Zip Code.

Population Analysis:

The population statistics were compiled using two sources. The statistics for the population in the year 2000 was taken from the 2000 census data found at www.census.gov. The estimated 2008 population statistics were compiled using the website, www.zip-codes.com, which seemed to be very accurate and consistent. To determine rate of growth in our analysis, we simply compared the 2008 population numbers with the 2000 census numbers.

All the other analysis in this report was taken from a wide variety of sources that are footnoted when appropriate in this report.

Critical Demographic Findings:

The following are the key demographic findings across the three major statistical categories the report is analyzing – Grace Church influence, churched/unchurched region and population growth.

Grace Church Analysis

Below is a table of where Grace Church Members, Attendees and Guests are primarily located. They are listed in order of Members, since they are the primary targets that we would pull from to begin a multi-site plant.

Zip Codes	County/City	Members	Attendees	Guests
27713	Durham/Durham	71	60	36
27517	Orange/Chapel Hill	33	40	38
27707	Durham/Durham	29	50	28
27705	Durham/Durham	21	27	28
27516	Chapel/Chapel Hill	21	70	51
27510	Oreage/Carrboro	19	33	27
27312	Chatham/Pittsboro	12	17	8
27278	Hillsborough/Hillsborough	11	12	16
27703	Durham/Durham	10	13	8
27712	Durham/Durham	7	22	6
27302	Alamance/Mebane	6	9	3
27253	Alamance/Graham	4	3	0
27513	Wake/Cary	4	1	3
27704	Durham/Durham	4	2	5
27519	Wake/Cary	4	1	0
27701	Durham/Durham	2	2	0
27606	Wake/Raleigh	2	2	0
27244	Alamance/Elon	2	0	0
27539	Wake/Apex	2	0	2
27511	Wake/Cary	1	6	1
27607	Wake/Raleigh	1	2	3
27344	Chatham/Siler City	1	0	0
27615	Wake/Raleigh	1	0	8
27612	Wake/Raleigh	1	1	0
27560	Wake/Morrisville	1	13	0
27502	Wake/Apex	0	2	5
27243	Efland/Efland	0	1	0
27609	Wake/Raleigh	0	1	1
27377	Guilford/Whitsett	0	1	0
27523	Wake/Apex	0	3	3
27613	Wake/Raleigh	0	0	5
27617	Wake/Raleigh	0	0	9
27614	Wake/Raleigh	0	0	2
Totals		199	334	260

Analysis:

The analysis is very positive. Grace Church has the strongest presence across all categories in the Zip Codes immediately surrounding the current location. That influence generally wanes proportionally the further one gets from the campus. However, the Grace Church draws many more Attendees and Guests from the Zip Codes to the west and south of 27514, than it does east and north.

These stats reveal one other bit of information. Generally, the Guests that visit Grace from the Zip Codes adjacent to 27514 have a much higher likelihood of becoming an Attendee than a Member that those just two Zip Codes away. Thus, it seems reasonable that a multi-site might be better positioned at least two Zip Codes away from 27514.

Churched/Unchurched Regions

Below are two tables reflecting the saturation levels of churches by Zip Codes. The first table is a list of the 15 least churched Zip Codes, and the second table is a list of the 15 most churched Zip Codes. As a reference point, the average number of people per every one church in the Zip Codes we researched was 995.

15 Least Churched Zip Codes

Zip Code	County/City	Number of People per every 1 church
27614	Wake/Raleigh	3,543
27519	Wake/Cary	2,659
27613	Wake/Raleigh	2,566
27510	Orange/Carrboro	2,514
27560	Wake/Morrisville	2,244
27606	Wake/Raleigh	1,976
27511	Wake/Cary	1,938
27612	Wake/Raleigh	1,735
27513	Wake/Cary	1,728
27516	Chapel/Chapel Hill	1,675
27615	Wake/Raleigh	1,586
27617	Wake/Raleigh	1,575
27713	Durham/Durham	1,535
27712	Durham/Durham	1,517
27517	Chapel/Chapel Hill	1,495

15 Most Churched Zip Codes

Zip Code	County/City	Number of People per every 1 church
27562	Wake/New Hill	156
27701	Durham/Durham	374
27298	Randolph/Liberty	383
27344	Chatham/Siler City	395
27522	Wake/Creedmoor	492
27217	Alamance/Burlington	497
27249	Gilford/Gibsonville	501
27559	Chatham/Moncure	528
27302	Alamance/Mebane	563
27244	Alamance/Elon	579
27258	Alamance/Haw River	598
27312	Chatham/Pittsboro	601
27278	Hillsborough/Hillsborough	657
27243	Efland/Efland	657
27703	Durham/Durham	662

Analysis:

These numbers are encouraging in that they reveal the tremendous need for more churches that are in the immediate influence of Grace Church. The research reveals three primary results:

First, generally the growth of churches does not keep pace with population. Generally, as will be shown on the next page, the least churched areas are areas that experienced the highest growth in the last 8 years. Secondly, the more rural the location, the more churches. Third, the 540 corridor is the location of the least churched areas in our immediate influence. Six of the top 15 – including 4 of the top 5 – least churched areas are along the 540 corridor. Three more Zip Codes are within a 5-10 minute drive of 540.

Population Growth

Below are two charts measuring the population growth in the Zip Codes we analyzed. The first chart includes the 10 fastest growing Zip Codes, and the second chart is the 15 slowest growing Zip Codes.

Note: several of both the fastest and slowest growing areas are due to new Zip Codes being added. They are noted below.

10 Fastest Growing Zip Codes from 2000 to 2008

Zip Code	County/City	2000 Population	2008 Population	Total Growth
27519	Wake/Cary	New Zip	29,245	29,245
27517	Chapel/Chapel Hill	New Zip	26,919	26,919
27614	Wake/Raleigh	11,045	35,426	24,381
27587	Wake/Wake Forrest	29,476	51,482	22,006
27713	Durham/Durham	30,903	49,115	18,212
27617	Wake/Raleigh	New Zip	17,322	17,322
27539	Wake/Apex	New Zip	16,307	16,307
27703	Durham/Durham	31,682	44,379	12,697
27560	Wake/Morrisville	10,320	22,443	12,123
27613	Wake/Raleigh	36,460	46,185	9,725

15 Slowest Growing Zip Codes from 2000 to 2008

Zip Code	County/City	2000 Population	2008 Population	Total Growth
27502	Wake/Apex*	-44,147	30,066	-14,081
27511	Wake/Cary*	-45,130	34,875	-10,255
27701	Durham/Durham	-25,096	21,677	-3,419
27606	Wake/Raleigh*	-43,420	41,491	-1,929
27607	Wake/Raleigh	-18,309	17,642	-667
27244	Alamance/Elon	-10,762	10,417	-345
27298	Randolph/Liberty	-9,527	9,195	-332
27608	Wake/Raleigh	-10,116	9,844	-272
27559	Chatham/Moncure	-2,149	2,112	-37
27562	Wake/New Hill	-1,727	1,719	-8
27258	Alamance/Haw River	-4,985	5,380	395
27243	Efland/Efland	-3,206	3,942	736
27510	Orange/Carrboro	-14,241	15,084	843
27705	Durham/Durham	-40,713	41,606	893
27349	Allamance/Chattham/Snow Camp	-4,925	6,100	1,175

* = Adjacent a New Zip Code

Analysis:

These numbers reveal the following. First, as stated previously, the saturation of churches is greatly connected to population growth. Seven of the Top 10 Fastest growing Zip Codes are among the least churching Zip Codes in the area, while Seven of the slowest growing Zip Codes are among the most churching areas. Secondly, the 540 corridor is generally the fastest growing population area within the Grace Church influence. Six of the top 10 fastest growing Zip Codes are along 540, and 8 of the 10 fastest growing Zip Codes are within a 10-minute drive of 540.

Data Analysis:

The following is the process by which I analyzed the data above to come up with the optimum location recommendations for the next Grace Church campus.



The *Multi-Site Church Revolution* by Surratt, Ligon and Bird asks three key questions to analyze choosing a new location for a campus site. 1) Is there a base community in the area of the new site (note: the base community should be at least 10 minutes away from the original site)? 2) Is there a need for a church like the new site? 3) Is the new site in a community growing?¹ In addition to these three factors, I looked to see if each Zip Code were within an average Triangle worker's commute from the current Grace Church location – 25 minutes, or approximately 15-20 miles.²

To run an analysis I measured each of the four factors above in the following way. For the strength of the base community, I used the Fellowship One analysis and gave the populations five degrees of measure – **Very Strong**, for a heavy presence of church members and attendees; **Strong**, for a presence of each category; **Moderate**, for either a presence in or near the Zip Code; **Light**, if there was very little presence in or near the Zip Code; **No**, for no presence in or near the Zip Code. I also compared each Zip Code on its distance from the 27514 campus. If portions of the Zip Code fell within a 10-minute drive (approximately 3-6 miles) I noted it.

To measure the “need” element, I simply listed where the Zip Code ranked on the church/unchurched scale. To measure a growing community, I listed the Zip Codes’ rank among the fastest or slowest growing areas. Lastly, I marked whether the Zip Code was within the 15-20 mile average commute from the current 27514 campus.

Finally, I ran all these statistical categories above by the top 10 fastest growing Zip Codes and the top 15 least churching Zip Codes since they were the easiest categories to identify. Below is the complete table of this analysis.

Zip Code	Location	Unchurched Rank	Growing Community Rank	Grace Base community within 10 minute drive	Within 10 minutes of Grace	Within Ave. Commute of Grace
27519	Wake/Cary	#2	#1	Moderate	No	Yes
27517	Orange/Chapel Hill	#15	#2	Very Strong	No (slightly)	Yes
27614	Wake/Raleigh	#1	#3	No	No	No
27587	Wake/Wake Forrest	#24	#4	Slight	No	No
27713	Durham/Durham	#13	#5	Very Strong	Partially	Yes
27617	Wake/Raleigh	#12	#6	Moderate	No	Yes
27539	Wake/Apex	#16	#7	Light	No	No
27703	Durham/Durham	Bottom 15	#8	Very Strong	No	Yes
27560	Wake/Morrisville	#5	#9	Strong	No	Yes
27613	Wake/Raleigh	#3	#10	Moderate	No	Partially
27510	Orange/Carrboro	#4	Bottom 15	Very Strong	Partially	Yes
27511	Wake/Cary	#7	Bottom 2 (Adjacent to New Zip Code)	Moderate	No	Partially
27612	Wake/Raleigh	#8	#12	Light	No	No
27513	Wake/Cary	#9	#14	Moderate	No	Partially
27516	Orange/Chapel Hill	#10	#19	Very Strong	Partially	Yes
27606	Wake/Raleigh	#6	Bottom 4	Light	No	No
27615	Wake/Raleigh	#11	#16	Light	No	No
27712	Durham/Durham	#14	#18	Strong	No	Yes

Next, I took the Zip Codes above and I only took the ones that met the following criteria.

- It ranked in the Top 15 least churching Zip Codes
- It Ranked in the Top 10 fastest growing community
- It has a “Moderate” or higher rating with Grace Church Members, Attendees and Guests
- It is more than a 10 minute drive from the current Grace Church 27514 campus
- It is at least “partially” within the Average Commute of a Triangle Resident



Below is a table of the results.

Zip Code	Location	Unchurched Rank	Growing Community Rank	Grace Base community within 10 minute drive	Within 10 minutes of Grace	Within Ave. Commute of Grace
27519	Wake/Cary	#2	#1	Moderate	No	Yes
27517	Orange/Chapel Hill	#15	#2	Very Strong	No (slightly)	Yes
27617	Wake/Raleigh	#12	#6	Moderate	No	Yes
27560	Wake/Morrisville	#5	#9	Strong	No	Yes
27613	Wake/Raleigh	#3	#10	Moderate	No	Partially

These are the five Zip Codes that qualified base on qualifying conditions above.

Top Five Zip Codes In Detail

The following are some general observations on each of the Top Five Zip Codes that are worthy of consideration:

27519

Positives:

- High ranking on major categories
- High unchurched ranking
- High growth ranking
- Within 10 minutes of 540 corridor

Negatives:

- New Zip code
- Long distance
- Not on the 540 corridor

27517

Positives:

- Strongest Grace Church base
- Lower risk

Negatives:

- Slightly within 10 minute commute of 27514 campus
- Grace Church is currently fairly affective in reaching this area
- Not along the 540 corridor
- New Zip Code

27617

Positives:

- Within 10 minutes of 7 of the 15 least churched Zip Codes
- One the 540 corridor
- Decent support base from Grace Church in adjacent Zip Codes

Negatives:

- Lower unchurched rate in immediate Zip Code
- Distance from 27514 campus

27560

Positives:

- High rating in leading categories
- Strong base of Grace Church support
- On 540 corridor
- Within 6 of top 15 least churched Zip Codes

Negatives:

- Distance from 27514 Campus

27613

Positives:

- High Unchurched ranking
- 10 minutes from 6 of the Top 10 least churched Zip Codes
- On the 540 corridor

Negatives:

- Distance from the 27514 campus
- Lower base support

Draft Recommendations:

Considering all the analysis of this report, below are the following recommendation:

Should the leadership choose a location based on this analysis:

- Choose one of the top five Zip Codes in this report
- Choose a list of priorities to narrow down which of the top five Zip Codes is chosen
- Begin investigating sites, core team, etc. in relation to these top five Zip Codes

Should the leadership want more information before choosing a location:

- *Choose a list of clear priorities on which to choose a site.* For example, how strong does the base core from Grace need to be? Which is a higher priority, unchurched location or growing community? Etc.
- *Rework the statistical analysis based on the priority list.*