City of Raleigh Data Book 2013

Chapter 1: Introduction of the Raleigh Data Book

The Raleigh Data Book is an annual publication of updated community information collected by City of Raleigh Department of City Planning staff. The Data Book builds upon the larger, more comprehensive "Community Inventory Report: Background Studies for the Comprehensive Plan" published in 2008. The Community Inventory Report remains the analytical basis for the City of Raleigh's 2030 Comprehensive Plan and is accessible on-line: http://www.raleighnc.gov/cp

Annual Updates of City Data: Raleigh Data Book

The City of Raleigh 2030 Comprehensive Plan, adopted in November 2009, provides implementation instructions regarding the monitoring of existing conditions (Action Item IM 3.3). More specifically, Action Item IM 3.4, "Community Inventory Updates", states that data in the report will be updated every year.

The Raleigh Data Book is published on line in conjunction with population estimates conducted by city staff that occur in July each year. It focuses on topical areas of the Community Inventory Report which have been reviewed through comprehensive planning initiatives during the previous calendar year, with a data benchmark point of December 31st whenever possible. All figures and tables are for the city of Raleigh corporate limits unless otherwise specified. The 2013 Raleigh Data Book updates and/or accompanies the Community Inventory Report chapters, listed below and correlated to 2013 Data Book chapters.

*** = Please see Community Inventory Report for this data**

List of Figures and Tables (next page) provides links to data within the 2013 Raleigh Data Book.

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Chapter 2: Demographics and Household Trends

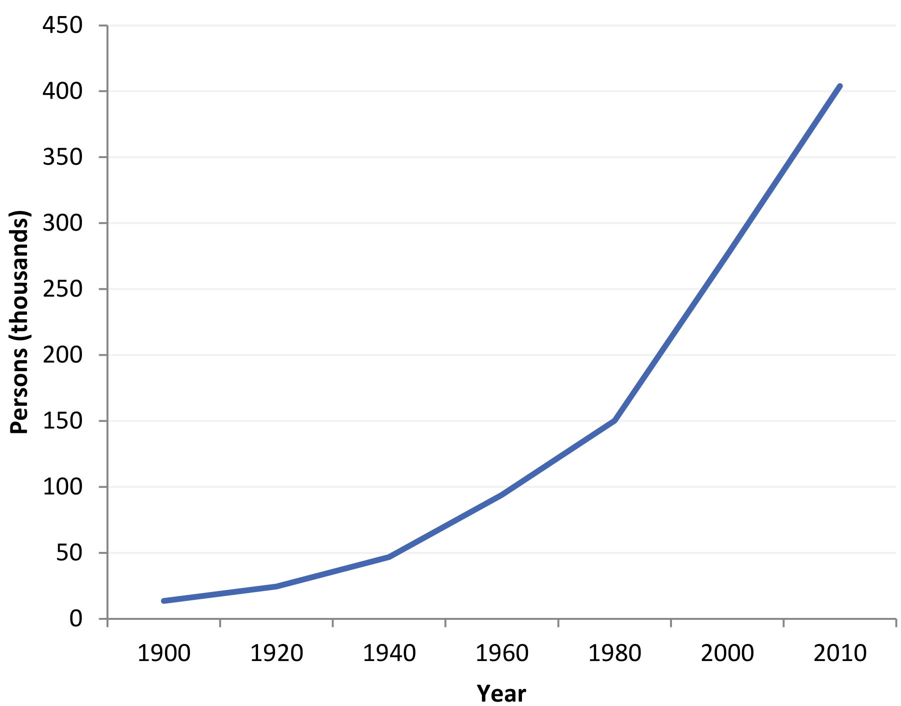
With a population increase of 53% from 2000 to 2012, Raleigh is one of the fastest-growing cities in the country. This chapter provides the most up-to-date data available for understanding the characteristics of the individuals and households that make up the population of Raleigh.

The data presented in this chapter have been drawn from a variety of sources. The decennial census count numbers provide the baseline for household and population estimates released in the intervening years. The American Community Survey of the U.S. Census Bureau provides detailed demographics, summarized over time from sample data. The U.S. Census Bureau's Population Estimates Program provides population estimates between the census years. Building permit data also gives an overview of recent trends in housing construction.

2.1 City Population & Household Trends

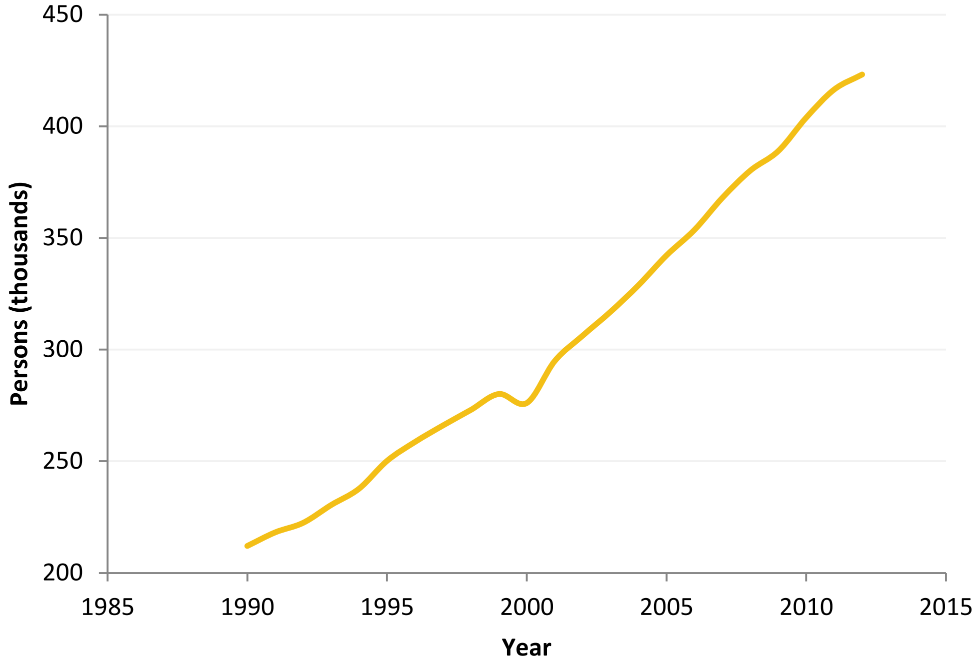
The most recent Census population estimates reflect Raleigh's continued growth (see Figures 2.1 and 2.2). In 2012, Raleigh was estimated to have a population of 423,179 – a 1.6% increase from the previous year (see Table 2.1). The number of housing units has also grown, with an estimate of 180,196 units in 2012 representing an increase of 1.1% from 2011 (see Table 2.2). Population and housing unit density has also increased slightly continuing the upward trend seen over the last few years (see Figure 2.4).

Figure 2.1 Census Population, 1900 – 2010



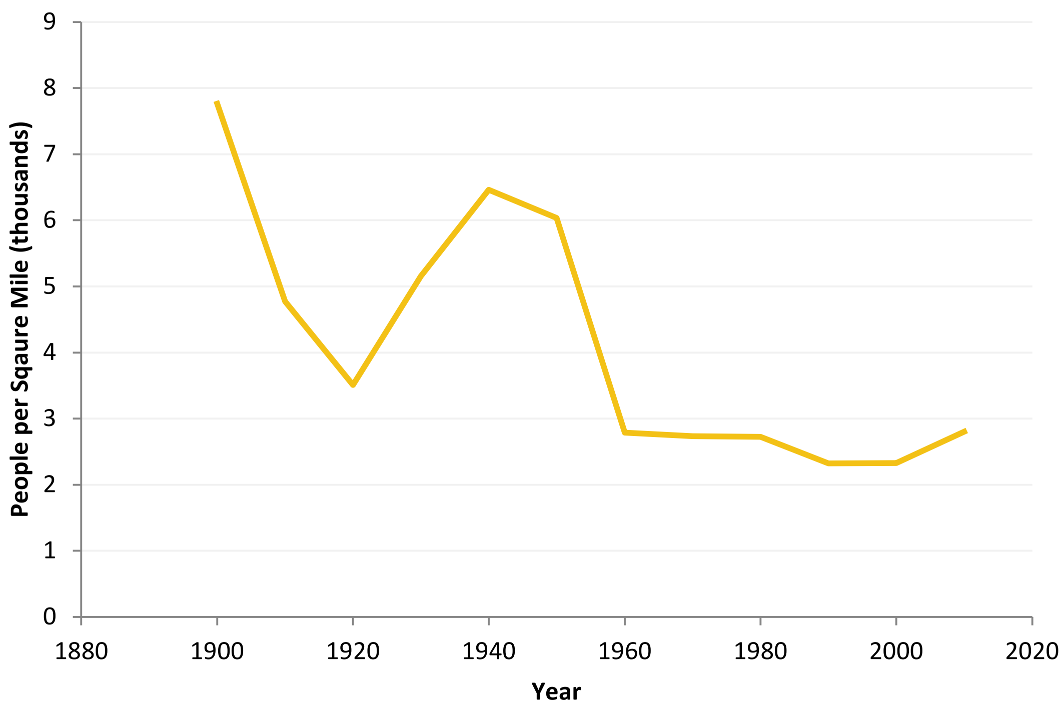
Source: U.S. Census Bureau, Decennial Data

Figure 2.2 Census Population Count and Estimates, 1990 – 2012



Sources: U.S. Census Bureau, Decennial Data (1990, 2000, 2010), Population Estimates Program (July, 1991-2012)

Figure 2.3 Population Density, 2000 – 2010



Source: U.S. Census Bureau, Decennial Data; Raleigh Department of City Planning

Table 2.1 Population, Growth Rate, and Density, 1900 – 2012

Year	Population	Annual Percent Growth Rate	Land Area in Miles^2	Population Density (people per square mile)
1900	13,643	--	1.76	7,765
1910	19,218	3.5%	4.03	4,773
1920	24,418	2.4%	6.96	3,508
1930	37,379	4.3%	7.25	5,153
1940	46,879	2.3%	7.25	6,463
1950	65,679	3.4%	10.88	6,035
1960	93,931	3.6%	33.67	2,790
1970	122,830	2.7%	44.93	2,734
1980	150,255	2.0%	55.17	2,724
1990	212,092	3.5%	91.40	2,321
2000	276,093	2.7%	118.71	2,326
2010	403,892	3.9%	143.77	2,809
2011	416,468	3.1%	144.87	2,875
2012	423,179	1.6%	145.06	2,917

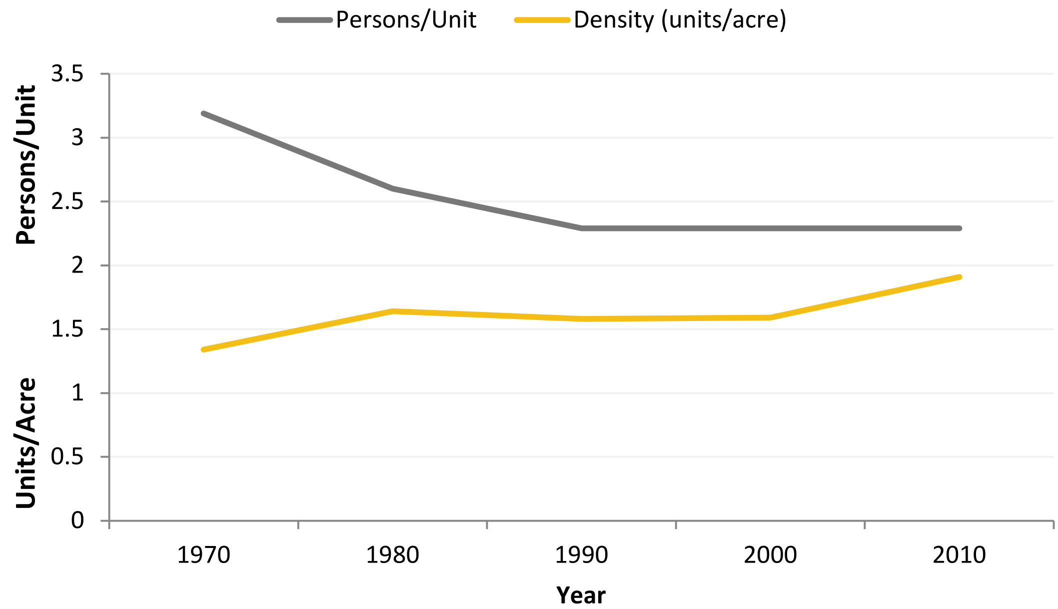
Source: U.S. Census Bureau, Decennial Data & Population Estimates; Land Area by Raleigh Dept. of City Planning

Table 2.2 Housing Units, Growth Rate, and Unit Density, 1970 – 2012

Year	Housing Units	Annual Percent Growth Rate	Land Area in Acres	Housing Density (units/acre)
1970	38,464	--	28,755	1.34
1980	57,866	4.2%	35,309	1.64
1990	92,643	4.8%	58,496	1.58
1991	95,116	2.7%	59,226	1.61
1992	97,589	2.6%	60,390	1.62
1993	100,064	2.5%	61,318	1.63
1994	103,195	3.1%	62,662	1.65
1995	106,326	3.0%	66,157	1.61
1996	109,457	2.9%	68,352	1.60
1997	112,415	2.7%	70,291	1.60
1998	115,471	2.7%	71,693	1.61
1999	118,227	2.4%	73,536	1.61
2000	120,699	2.1%	75,974	1.59
2001	129,286	7.1%	79,328	1.63
2002	134,806	4.3%	80,806	1.67
2003	139,259	3.3%	81,632	1.71
2004	144,797	4.0%	83,571	1.73
2005	150,209	3.7%	85,344	1.76
2006	155,047	3.2%	85,933	1.80
2007	158,227	2.1%	89,549	1.80
2008	160,493	1.4%	90,176	1.78
2009	171,758	7.0%	91,328	1.88
2010	176,124	2.5%	92,013	1.91
2011	178,203	1.2%	92,717	1.92
2012	180,196	1.1%	92,838	1.94

Source: U.S. Census Bureau, 100% Data; Non-Decennial Year Housing Unit Estimates and Land Area by Raleigh Department of City Planning

Figure 2.4 Dwelling Unit Densities, 1970 – 2010



Source: U.S. Census Bureau, 100% Data; Raleigh Department of City Planning

2.2 Residential Development

Single family detached dwelling units comprise 47% of housing in Raleigh based on 2007-2011 American Community Survey data (see Table 2.3 and Figure 2.5). Multi-family apartments come in second at 36%, followed by townhouses (13%), duplexes (3%), and mobile homes (1%). Recent building trends in Raleigh suggest a change in the proportion depicted in Figure 2.5. From 2008 to 2012, apartments made up 57% of all issued residential building permits. In 2012, apartments comprised the largest share – 72% - of residential building permits issued in Raleigh (see Figure 2.7 and Table 2.7). Single family homes came in second at 15%.

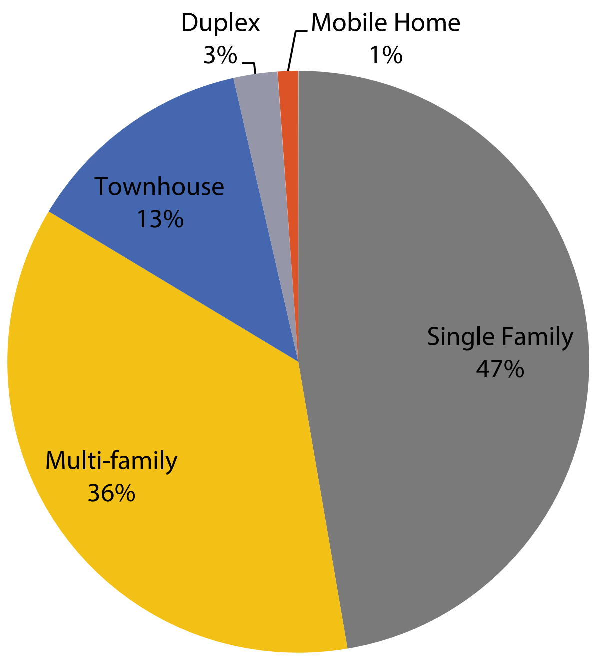
Raleigh's housing stock is relatively young, with over 80% of its housing units built in the last 45 years (see Table 2.4). The overall household vacancy rate (homeowners and renters) is 9.7%. The homeownership rate stands at 55%, a slight increase from 52% in 2000 (see Table 2.5 and Figure 2.6).

Table 2.3 Total Housing Units by Number in Structure, 2011

Units in Structure	Number	Percent
1-unit, detached	82,906	47.3%
1-unit, attached	22,407	12.8%
2 units	4,299	2.5%
3 or 4 units	8,505	4.9%
5 to 9 units	15,499	8.8%
10 to 19 units	22,088	12.6%
20 or more units	17,630	10.1%
Mobile home	1,991	1.1%
Total units	175,325	100%

Source: U.S. Census Bureau, 2007-2011 American Community Survey, 5-year Estimates

Figure 2.5 Housing Share by Building Type, 2011



Source: U.S. Census Bureau, 2007-2011 American Community Survey, 5-year Estimates

Table 2.4 Housing Units by Year Built, 2011

Year Built	Number	Percent
2005 or later	19,470	11.1%
2000 to 2004	31,504	18.0%
1990 to 1999	34,334	19.6%
1980 to 1989	33,660	19.2%
1970 to 1979	21,293	12.1%
1960 to 1969	15,571	8.9%
1950 to 1959	9,940	5.7%
1940 to 1949	4,145	2.4%
1939 or earlier	5,408	3.1%
Total	175,325	100.0%

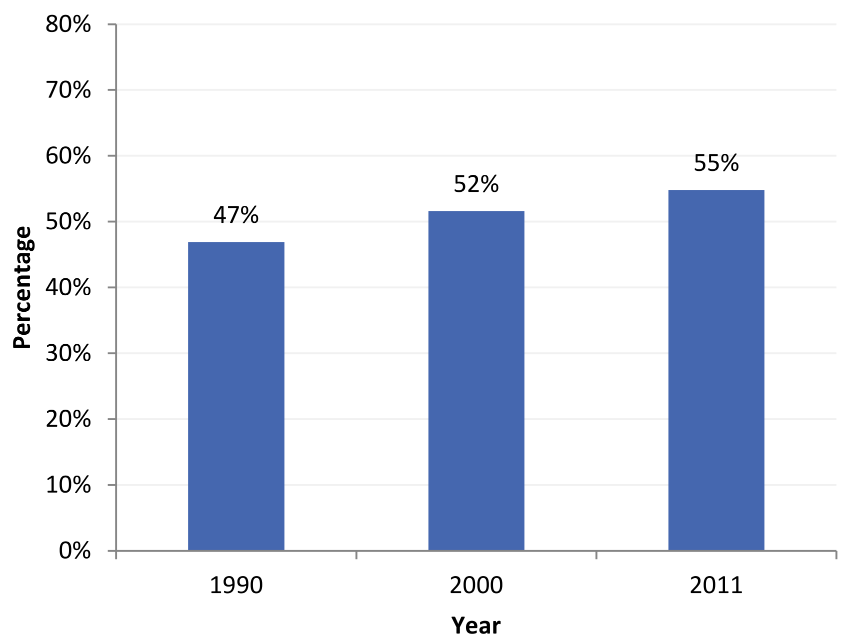
Source: U.S. Census Bureau, 2007-2011 American Community Survey, 5-year Estimates

Table 2.5 Occupancy by Tenure, 2011

Total housing units	175,325
Occupied housing units	158,354
Vacant housing units	16,971
Overall vacancy rate	9.7%
Homeowner vacancy rate	2.4%
Rental vacancy rate	8.9%

Source: U.S. Census Bureau, 2007-2011 American Community Survey, 5-year Estimates

Figure 2.6 Homeownership Rate, 1990 – 2011



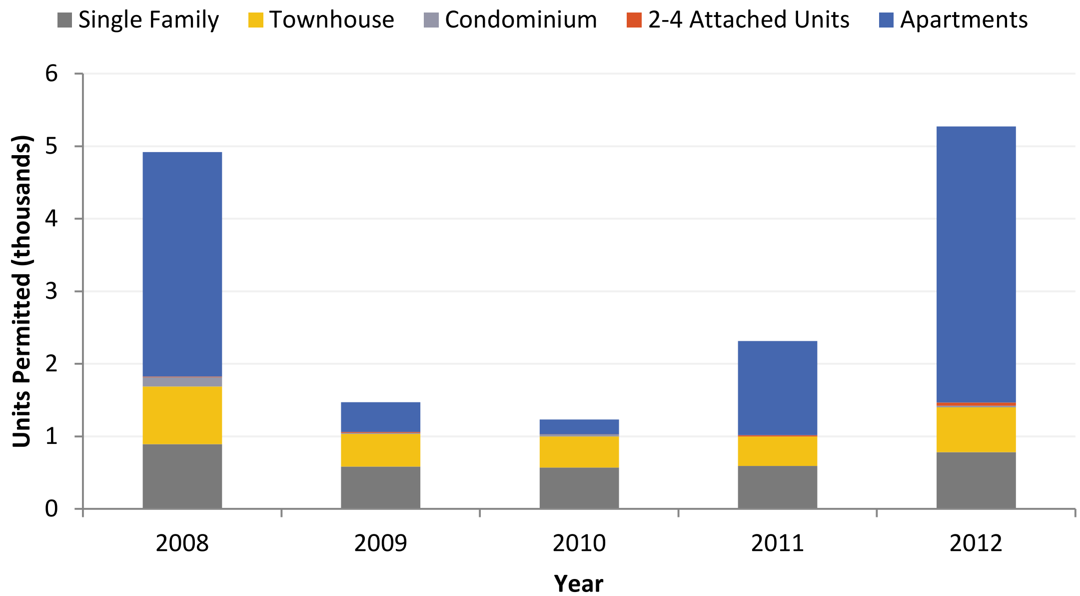
Source: U.S. Census Bureau, 100% Data; 2007-2011 American Community Survey, 5-year Estimates

Table 2.6 Housing Tenure for Occupied Units, 1990, 2000, 2011

	1990		2000		2011	
	Number	Percent	Number	Percent	Number	Percent
Owner-occupied	40,235	46.9%	58,079	51.6%	86,730	54.8%
Renter-occupied	45,587	53.1%	54,529	48.4%	71,624	45.2%
Total occupied units	85,822	100.0%	112,608	100.0%	158,354	100.0%

Source: U.S. Census Bureau, Decennial Data, (1990, 2000); 2007-2011 American Community Survey, 5-year Estimates

Figure 2.7 Residential Units Permitted, 2008 - 2012



Source: City of Raleigh Inspections Department and Department of City Planning

Table 2.7 Residential Units Permitted[a], 2008 – 2012

Year	Single Family	Townhouse	Condominium	2-4 Attached Units	Apartments	Totals
2008	892	793	129	8	2,891	4,713
2009	582	453	13	10	411	1,469
2010	570	427	56	2	205	1,260
2011	592	405	0	20	1,299	2,316
2012	783	618	23	43	3,806	5,273
5-year total	3,419	2,696	221	83	8,612	15,031
Percent of Total	23%	18%	1%	1%	57%	100%
5-year average	684	539	44	17	1,722	3,006

Source: City of Raleigh Inspections Department and Department of City Planning

[a] This includes all units from the specified calendar year that have been permitted; it does not indicate construction.

Table 2.8 Net Residential Absorption, 2008 – 2012

Year	Units Constructed[a]	Demolished Units	Net Absorption
2008	5,076	-151	4,925
2009	2,672	-68	2,604
2010	1,999	-100	1,899
2011	2,653	-577	2,076
2012	2,293	-310	1,983
Total	14,693	-1,206	13,487
5-year average	2,939	-241	2,697

Source: City of Raleigh Inspections Department and Department of City Planning
[a] This includes all units from the specified calendar year that have passed final building inspection. The permit for the unit may or may not have been issued in the same year. For example, a unit may have been permitted in 2008, but could have then been constructed and passed final inspection in 2009 or later. This helps explain inconsistencies when comparing the numbers for units permitted in Table 2.7 and units constructed in Table 2.8.

2.3 City Profile

Looking at population distribution by age group, Raleigh is younger than North Carolina as a whole with higher percentages of children under 5 and 15 to 44 year-olds (see Figure 2.8). Raleigh's age distribution has not changed dramatically from 1990 to 2011, although the percentage of 45 to 64 year-olds has increased (see Figure 2.9).

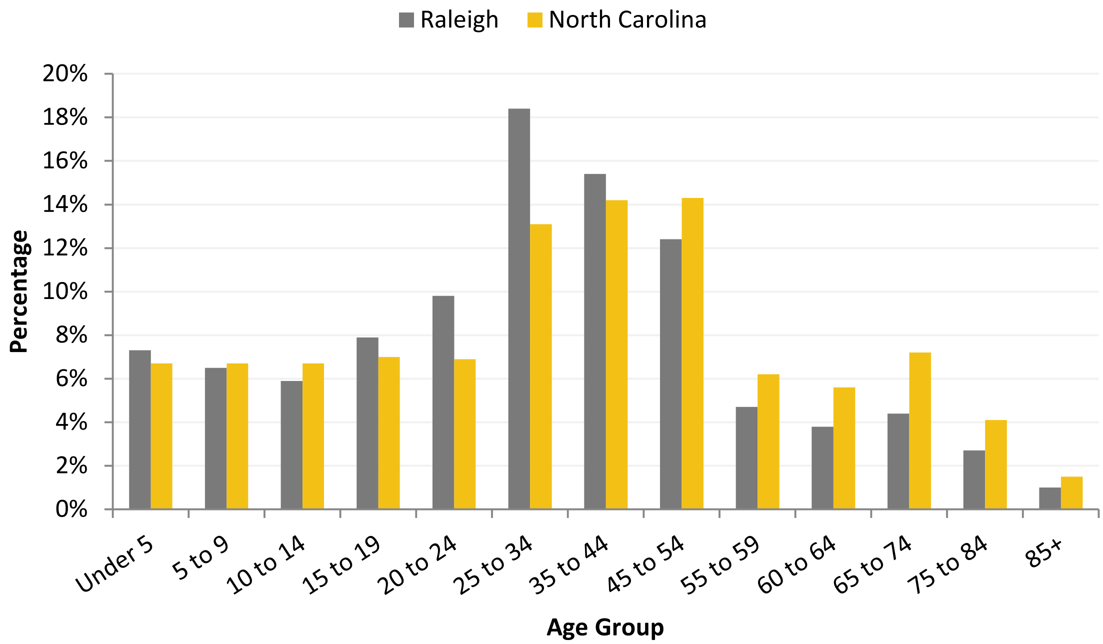
The white population share has decreased from 1990 to 2011, while the African-American population percentage has increased slightly (see Table 2.10). The Asian population share and the percentage of people identifying as "some other race" has also increased. The Hispanic/Latino population grew by 121% from 2000 to 2011, increasing its share of the total population from 7% to 11% (see Table 2.11).

In terms of educational attainment, Raleigh has a higher percentage of residents with a high school degree or higher (91%) and residents with a bachelor's degree or higher (47%) than the state of North Carolina and the nation (see Table 2.13). The percentages of people and families living below the poverty level have increased from 1990 to 2011 (see Table 2.14). For all people, the percentage went from 11.8% to 15.1%; for families, the percentage went from 9% to 10.7%.

Median household income and per capita income have also gone down over this time period when adjusting for inflation (see Table 2.14). Measured in 2011 dollars, the median household income for Raleigh went down by approximately $4,000 from 1990 to 2011 while the per capita income decreased by approximately $300.

The share of different types of households has also changed slightly during this period (see Table 2.15 and Figure 2.11). The share of single parent households has increased the most (over 4%). Married couple households with children have decreased slightly (.3%). Persons per household – as measured by the population in households divided by the total number of households – has trended upward from 1990 to 2011 (see Table 2.15).

Figure 2.8 Population Distribution by Age Group, 2011



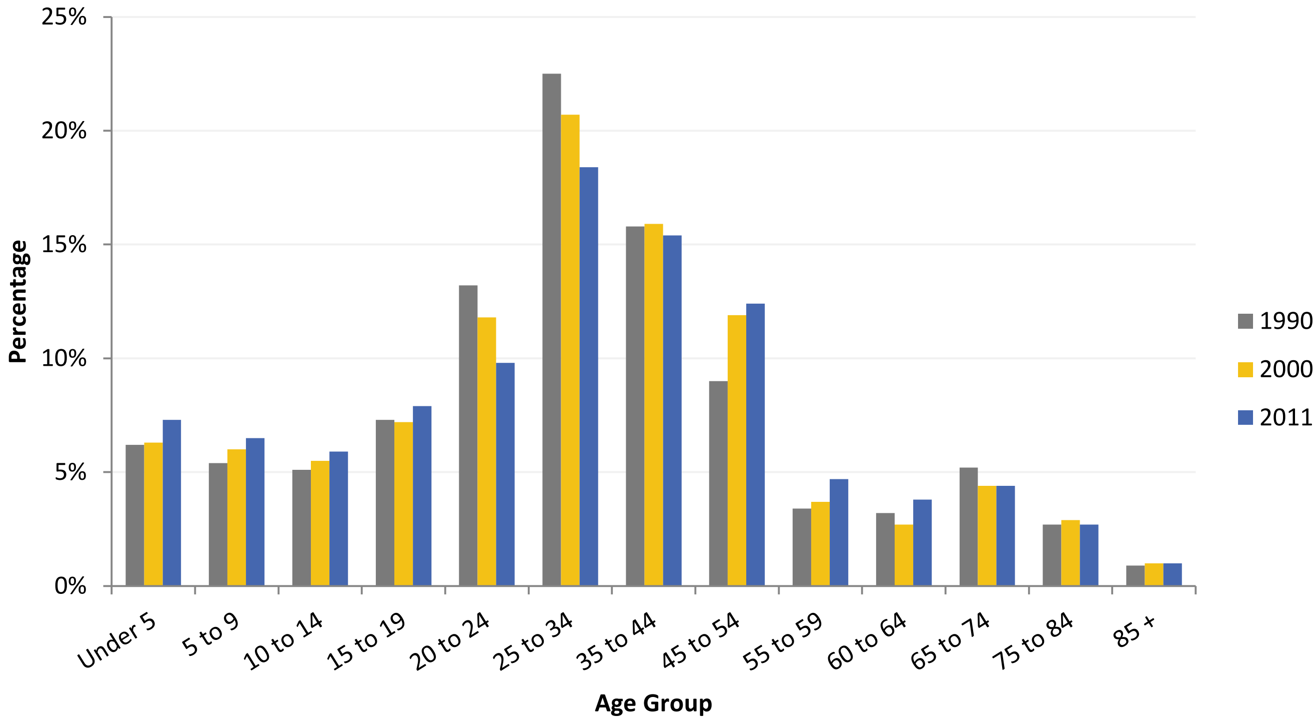
Source: U.S. Census Bureau, 2007-2011 American Community Survey, 5-year Estimates

Table 2.9 Age Groups, 1990, 2000, 2011

	1990		2000		2011	
Age Groups	**Numbers**	**%**	**Numbers**	**%**	**Numbers**	**%**
Under 5	12,976	6.20%	17,461	6.30%	29,027	7.32%
5 to 9	11,133	5.40%	16,444	6.00%	26,366	6.50%
10 to 14	10,540	5.10%	15,254	5.50%	23,957	5.88%
15 to 19	15,223	7.30%	19,864	7.20%	29,151	7.86%
20 to 24	27,427	13.20%	32,458	11.80%	40,864	9.75%
25 to 34	46,845	22.50%	57,105	20.70%	74,420	18.41%
35 to 44	32,907	15.80%	43,826	15.90%	61,216	15.39%
45 to 54	18,806	9.00%	32,984	11.90%	50,034	12.36%
55 to 59	7,015	3.40%	10,308	3.70%	19,845	4.69%
60 to 64	6,707	3.20%	7,394	2.70%	15,874	3.81%
65 to 74	10,801	5.20%	12,025	4.40%	17,687	4.36%
75 to 84	5,717	2.70%	8,143	2.90%	10,497	2.68%
85 +	1,814	0.90%	2,827	1.00%	4,954	1.01%

Source: U.S. Census Bureau 100% Data; 2007-2011 American Community Survey, 5-year Estimates

Figure 2.9 Age Distribution, 1990, 2000, 2011



Source: U.S. Census Bureau 100% Data; 2007-2011 American Community Survey, 5-year Estimates

Table 2.10 Population by Race, 1990, 2000, 2011

	1990		2000		2011	
	Number	**%**	**Number**	**%**	**Number**	**%**
White	143,862	69.2%	174,786	63.3%	236,068	59.8%
Black or African American	57,354	27.6%	76,756	27.8%	117,292	29.7%
American Indian & Alaska Native	584	0.3%	981	0.4%	1,012	0.3%
Asian or Pacific Islander	5,127	2.5%	9,445	3.4%	17,299	4.4%
Some other race	1,024	0.5%	14,125	5.1%	17,325	4.4%

Source: U.S. Census Bureau 100% Data; 2007-2011 American Community Survey, 5-year Estimates

Table 2.11 Growth in Hispanic Population, 2000 – 2011

	Number	**Percent of Total Population**
2000 Hispanic/Latino Population	19,308	7.0%
2011 Hispanic/Latino Population	42,719	10.8%
Percent Increase	121.3%	

Source: U.S. Census Bureau 100% Data; 2007-2011 American Community Survey, 5-year Estimates

Table 2.12 Components of Hispanic Population, 2011

	Number	Percent	Percent of Hispanic
Mexican	22,006	5.6%	51.5%
Puerto Rican	4,340	1.1%	10.2%
Cuban	1,082	0.3%	2.5%
Other Hispanic or Latino	16,579	4.2%	38.8%
Hispanic or Latino (of any race)	42,719	10.8%	100.0%

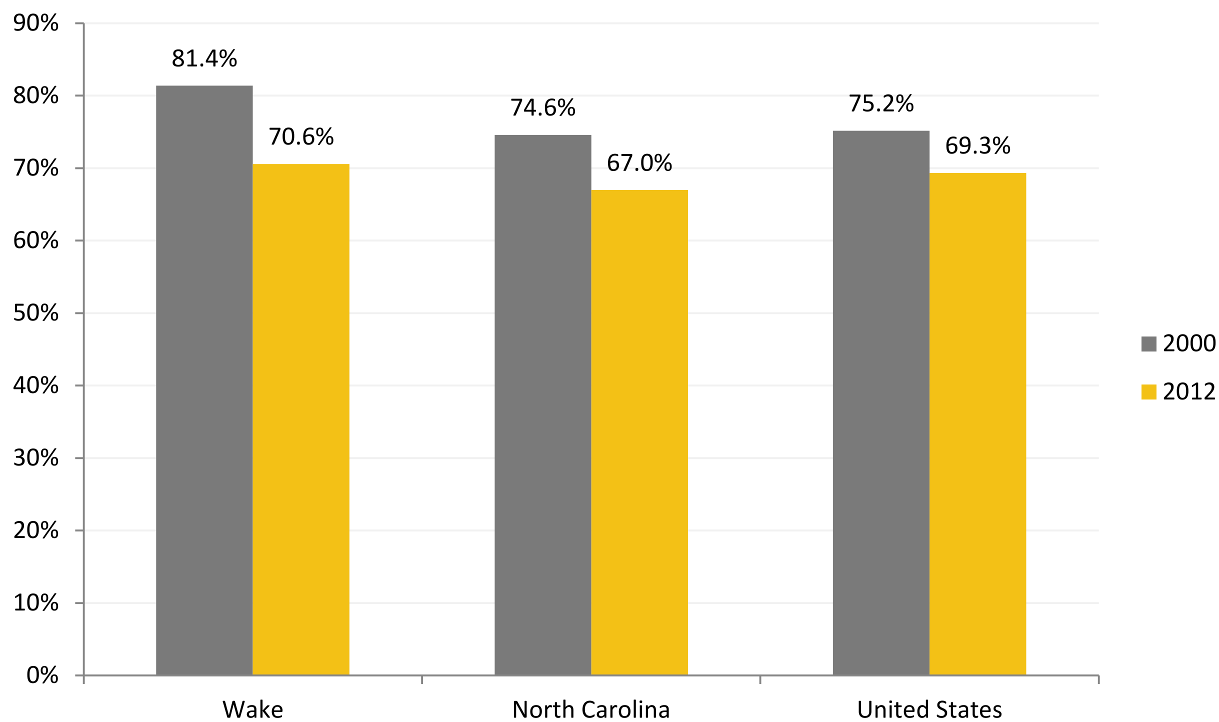
Source: U.S. Census Bureau 100% Data; 2007-2011 American Community Survey, 5-year Estimates

Table 2.13 Educational Attainment, 2000 & 2011

	2000		2011	
	High School Grad or higher	Bachelor's Degree or higher	High School Grad or higher	Bachelor's Degree or higher
Raleigh	84%	42%	91%	47%
North Carolina	77%	22%	84%	27%
United States	79%	24%	85%	28%

Source: U.S. Census Bureau, 100% Data; 2007-2011 American Community Survey, 5-year Estimates

Figure 2.10 Employment/Population Ratio for Civilians 16-64*, 2000 & 2012



Sources: NC Office of State Management and Budget, County Population Estimates; U.S. Census Bureau, Population Estimates Program; U.S. Bureau of Labor Statistics, Local Area Unemployment Statistics (County and State Employment) and Current Population Survey (National Employment)

* The percentages above may be slightly high since the population base includes only 16-64 year olds, while the employment numbers from the Bureau of Labor Statistics include all civilians 16 years and older. Including people 65 and older in the population base, however, would also skew the numbers and result in percentages that are likely much lower than the true employment/population ratio.

Table 2.14 Poverty, Income, and Employment Indicators, 1990, 2000, 2011

	1990	2000	2011
Percent of persons below poverty	11.8%	11.5%	15.1%
Percent of families below poverty	9.0%	7.1%	10.7%
Median Household Income (2011 dollars)	$56,867	$62,934	$52,819
Per Capita Income (2011 dollars)	$30,650	$33,907	$30,377
Unemployment Rate	4.0%	3.8%	5.6%
Labor Force Participation Rate	66.4%	72.7%	71.4%

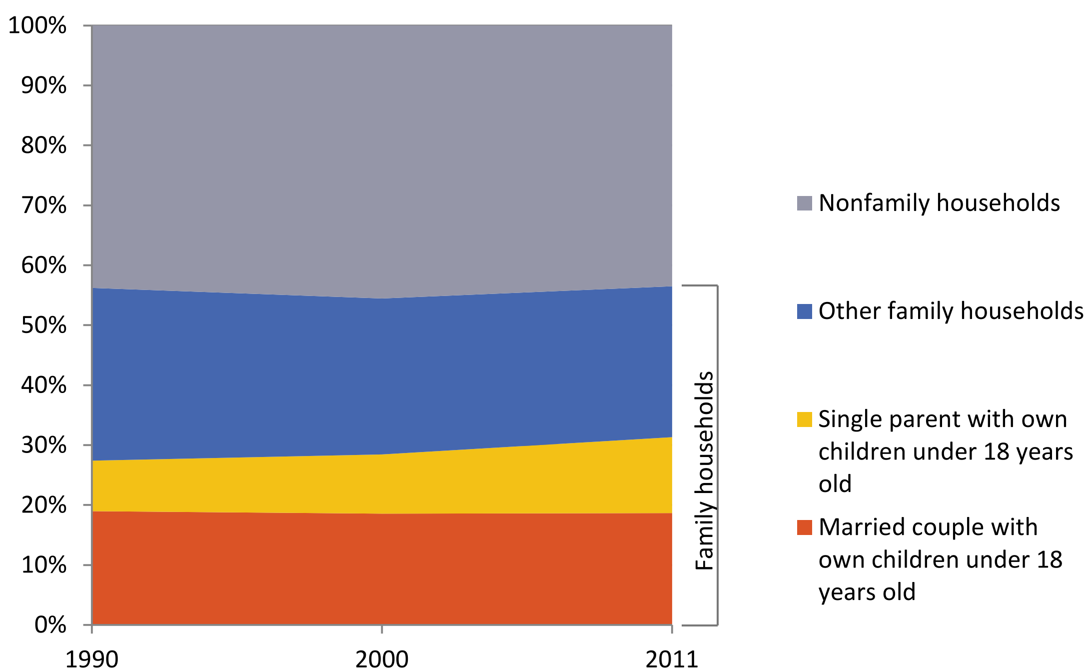
Source: U.S. Census Bureau, Decennial Censuses, 1990 and 2000; 2007-2011 American Community Survey 5-year Estimates

Table 2.15 Household Trends, 1990, 2000, 2011

	Number			Percent		
	1990	**2000**	**2011**	**1990**	**2000**	**2011**
Family Households	48,253	61,327	89,464	56.2%	54.5%	56.5%
Married couple with own children under 18 years old	16,293	20,914	29,562	19.0%	18.6%	18.7%
Single parent with own children under 18 years old	7,231	11,122	20,048	8.4%	9.9%	12.7%
Other family Households	24,729	29,291	39,854	28.8%	26.0%	25.2%
Nonfamily Households	37,569	51,281	68,890	43.8%	45.5%	43.5%
Total Households	**85,822**	**112,608**	**158,354**	**100.0%**	**100.0%**	**100.0%**
Persons per household	2.26	2.30	2.38			

Source: U.S. Census Bureau 100% Data (1990, 2000); 2007 - 2011 American Community Survey 5-year Estimates

Figure 2.11 Household Share by Type, 1990, 2000, 2011



Source: U.S. Census Bureau 100% Data (1990, 2000); 2007 - 2011 American Community Survey, 5-year Estimates

Table 2.16 Journey to Work, 2011

	Number	Percent
Car, truck, or van—drove alone	159,648	79.1%
Car, truck, or van—carpooled	20,257	10.0%
Worked at home	10,358	5.1%
Walked	4,709	2.3%
Public transportation (excluding taxicab)	4,249	2.1%
Other means	2,707	1.3%
Workers 16 years and over	201,928	100.00%

Source: U.S. Census Bureau, 2007-2011 American Community Survey, 5-year Estimates

Chapter 3: Land Use & Zoning

Land use is fundamental to the physical form and function of the city. The Comprehensive Plan is the primary policy guide that municipalities use to guide land use and the physical development and growth of the city. As set forth in the state enabling statute, the Comprehensive Plan is also the foundation for zoning.

While the Comprehensive Plan is a policy guide, the zoning ordinance and the site plan and subdivision regulations are law. These codes provide the regulatory framework for particular land uses and how the uses interact with each other. They address not only the prescribed use of property, but also the scale, massing and placement of buildings, site design and landscaping, and the quantity of off-street parking required.

The City of Raleigh currently exercises planning and zoning authority within its incorporated limits (its taxing and service area) as well as its Extra-Territorial Jurisdiction (ETJ), an area outside of the incorporated limits where the City has been granted land use authority by Wake County for the purposes of providing for the orderly development of areas programmed for future annexation in the short term. This chapter primarily addresses the land area within the ETJ boundary (i.e. incorporated limits plus ETJ), as this is the area where the City currently has the power to plan and zone. It is also the area for which detailed land use data are available. All references to the ETJ in this chapter refer to the full area within the ETJ boundary line.

The City also has annexation agreements with Wake County and adjacent municipalities delineating areas outside the current ETJ that are programmed for eventual annexation. These are divided into Short- and Long-Range Urban Service Areas (USAs), depending upon the anticipated time horizon for utility extension. These areas currently consist primarily of undeveloped land, farm fields, and low-density residential uses, and are only addressed generally in this chapter.

For further information see:

The 2030 Comprehensive Plan for the City of Raleigh
http://www.raleighnc.gov/business/content/PlanLongRange/Articles/2030ComprehensivePlan.html

Raleigh Zoning Code
http://www.raleighnc.gov/zoning

3.1 Land Use and Zoning Allocation

Single-family zones make up 63.2% of all residential zoning in Raleigh's planning jurisdiction (42.6% of total land area), and multi-family zones make up 36.8% of residential zoning and 24.8% of total land area (see Table 3.1). In terms of non-residential zoning, commercial zoning comprises 11.5% of total land area, industrial is 10.5%, office and institutional makes up 7.1%, and conservation is 3.5% (see Table 3.2). Overlay zoning districts (historic overlay districts, special highway overlay districts, downtown overlay district, etc.) cover 37.6% of total land area not accounting for overlap of different types of districts (see Table 3.3).

Table 3.1 Residential Zoning Allocation

Zoning District	Acres	Percent of Residential Zoning	Percent of Total Land Area
Single-Family Zones			
RR: Rural Residential	5,052	6.4%	4.3%
R-2: Residential-2	2,034	2.6%	1.8%
R-4: Residential-4	41,678	53.1%	35.8%
MH: Manufactured Home	826	1.1%	0.7%
Total Single-Family	**49,589**	**63.2%**	**42.6%**
Multi-Family Zones			
R-6: Residential-6	16,235	20.7%	14.0%
SP R-6: Special Residential-6	662	0.8%	0.6%
R-10: Residential-10	9,242	11.8%	7.9%
R-15: Residential-15	1,317	1.7%	1.1%
R-20: Residential-20	1,178	1.5%	1.0%
R-30: Residential-30	138	0.2%	0.1%
SP R-30: Special Residential-30	75	0.1%	0.1%
Total Multi-Family	**28,847**	**36.8%**	**24.8%**
Total All Residential Zones	**78,436**	**100.0%**	**67.5%**

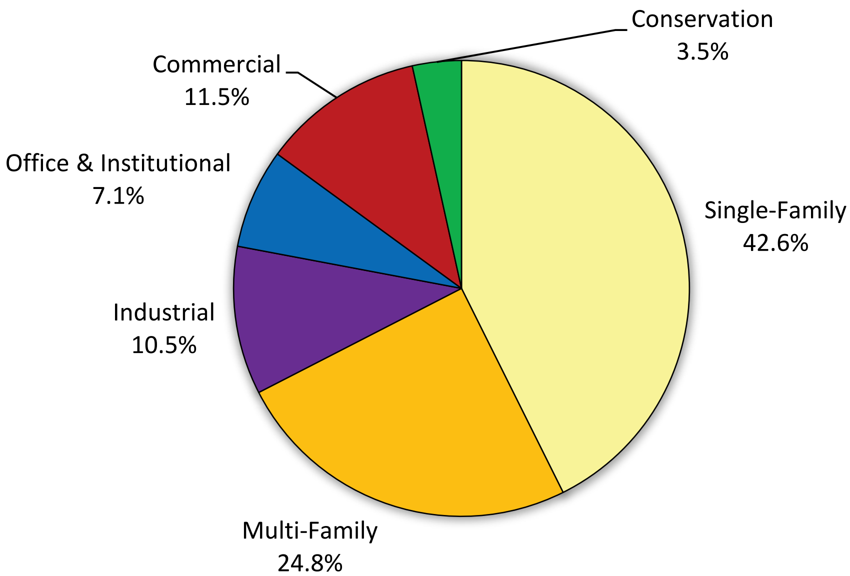
Source: City of Raleigh Department of City Planning, 2013

Table 3.2 Non-Residential Zoning Allocation

Zoning District	Acres	Percent of Non-Residential Zoning	Percent of Total Land Area
Industrial Zones			
IND-1: Industrial-1	9,270	24.5%	8.0%
IND-2: Industrial-2	2,955	7.8%	2.5%
Total Industrial	**12,225**	**32.3%**	**10.5%**
Office & Institutional Zones			
O&I-1: Office & Institutional-1	6,387	16.9%	5.5%
O&I-2: Office & Institutional-2	1,553	4.1%	1.3%
O&I-3: Office & Institutional-3	279	0.7%	0.2%
Total Office & Institutional	**8,219**	**21.7%**	**7.1%**
Conservation Zones			
AP: Agricultural Productive	2,066	5.5%	1.8%
CM: Conservation Management	1,967	5.2%	1.7%
Total Conservation	**4,033**	**10.7%**	**3.5%**
Commercial Zones			
BC: Buffer Commercial	27	0.1%	0.0%
BUS: Business	229	0.6%	0.2%
NB: Neighborhood Business	1,089	2.9%	0.9%
RB: Residential Business	74	0.2%	0.1%
SC: Shopping Center	2,422	6.4%	2.1%
TD: Thoroughfare District	9,528	25.2%	8.2%
Total Commercial	**13,370**	**35.3%**	**11.5%**
Total Non-Residential Allocation	**37,848**	**100.0%**	**32.5%**

Source: City of Raleigh Department of City Planning, 2013

Figure 3.1 Generalized Zoning Allocation



Source: City of Raleigh Department of City Planning, 2013

Table 3.3 Overlay Zoning District Allocation

Zoning District	Acres	Percent of Land Area
AOD – Airport Overlay District	2,214	1.9%
DOD – Downtown Overlay District	598	0.5%
HOD – Historic Overlay District	317	0.3%
MPOD – Metro-Park Protection Overlay District	1,451	1.2%
NCOD – Neighborhood Conservation Overlay District	2,827	2.4%
PBOD – Pedestrian Business Overlay District	222	0.2%
PDD – Planned Development Conditional Use Overlay District	4,862	4.2%
SHOD-1 – Special Highway Overlay District 1	7,936	6.8%
SHOD-2 – Special Highway Overlay District 2	5,214	4.5%
SHOD-3 – Special Highway Overlay District 3	203	0.2%
SHOD-4 – Special Highway Overlay District 4	107	0.1%
TODOD – Transit Oriented Development Overlay District	8,231	7.1%
WPOD – Watershed Protection Area Overlay District	9,586	8.2%
Total Overlay Districts (not accounting for overlap)	**43,769**	**37.6%**
Total Overlay Districts (accounting for overlap)	**38,501**	**33.1%**

Source: City of Raleigh Department of City Planning, 2013

3.2 Land Capacity, Annexation, and Growth Potential

The latest land capacity estimates completed in 2010 show Residential-4 as the zoning district with the largest amount – in acres (6,907) – of undeveloped land followed by Residential-6 (2,167 acres) and Thoroughfare District (1,941 acres) (see Table 3.4). Thoroughfare districts are also projected to have the highest number of dwelling units. Industrial-1 and thoroughfare districts show the largest projected square footage growth of non-residential space. As a flexible zoning designation that allows higher density residential and all other uses except for industrial, thoroughfare districts figure prominently in land capacity estimates. However, with the implementation of the new Unified Development Ordinance (UDO), thoroughfare districts and all districts except R-2 through R-10, conservation districts, and overlay districts will be remapped into new UDO districts over the next year and a half. A more up-to-date analysis of land capacity will likely be carried out in concert with this remapping.

In 2012, the city added 128 acres through annexation (see Table 3.5). As also shown in 2011, changes in state laws restricting city-initiated annexations has resulted in petition-only annexations, usually of smaller parcels by individual owners. The total future annexation potential for Raleigh is 42,115 acres (see Table 3.6). This includes both ETJ areas and Urban Services Areas (USA). Combined with the city's current acreage of 92,838, this brings the total potential city limits acreage to 134,953.

Table 3.4 Land Capacity Estimates by Zoning District

Zone	Total Area (acres) of Undeveloped Land	Projected Square Feet Non-Residential	Projected Dwelling Units
CM	410	0	0
AP	455	0	227
RR	1,382	0	1,036
R-2	529	0	794
R-4	6,907	0	20,720
SP R-6	35	0	175
R-6	2,167	0	10,834
R-10	723	0	7,234
R-15	393	0	5,889
R-20	73	0	1,465
SP R-30	2	0	54
R-30	1	0	30
MH	269	0	1,616
RB	8	53,489	41
O&I-1	482	7,872,192	4,819
O&I-2	274	5,964,332	3,765
O&I-3	38	550,092	0
BC	7	47,334	36
SC	500	3,269,269	5,629
NB	172	1,124,109	860
BUS	11	1,203,760	304
TD	1,941	12,679,549	29,108
IND-1	1,600	20,907,761	0
IND-2	317	6,400,084	605
Totals	**18,697***	**60,071,971**	**95,243**

(For purpose of this analysis, general and conditional use districts have been treated the same, and are aggregated together in this table for simplicity.)

*Totals do not include underdeveloped land.

*Zoning Districts with residential and commercial types have been allocated at a 50/50 split.

Source: City of Raleigh Department of City Planning and GIS Division, 2010

Table 3.5 Annexation, Growth of the City of Raleigh

Year	Acres in City Limits	Acres Added
1792	400	—
1857	1,124	724
1907	2,577	1,453
1920	4,455	1,878
1941	6,940	2,485
1951	6,974	34
1960	21,548	14,574
1970	28,755	7,207
1980	35,305	6,550
1990	58,493	23,188
2000	75,972	17,479
2010	92,435	16,463
2011	92,710	275
2012	92,838	128

Source: City of Raleigh Department of City Planning, 2013

Table 3.6 Future Raleigh City Limits Growth Potential

Geography	Acres
Current City Limits	92,838
Potential ETJ Growth Area	23,327
Potential USA Growth Area	18,788
Total Future Annexation Potential	**42,115**
Total Potential City Limits	**134,953**

Source: City of Raleigh Department of City Planning, 2013

Chapter 4: Economic Development & Employment Trends

One of the nation's most rapidly growing regions, the Research Triangle is benefiting from its long-time investment, especially towards major educational institutions and the Research Triangle Park. The expanding base of technology industries continues to generate new jobs and to attract skilled workers to fill them. The area's highly touted quality of life provides regional employers with a competitive advantage for attracting and retaining qualified workers. Protecting that quality of life into the future is critical to the region's ability to continue flourishing. The Triangle's jurisdictions are increasingly connected as employees cross-commute, new businesses develop to serve companies throughout the region, and existing industry spins off new businesses. In conjunction with the region as a whole, Raleigh's economy has shifted to one that is more technology-based and less reliant on government and manufacturing.

Wake County has shared in the region's economic health with a steady job base, leading a recovery from the recession that began in 2007. The county's economic base is changing, however, as technology, retail and service jobs replace jobs lost in manufacturing and agriculture. Key economic sectors include government, educational services, professional and technical services, information, and health care.

Within Raleigh, the state government, North Carolina State University and other educational institutions, and major health care centers have a more significant portion of the employment base. Job growth projections point to a major expansion of jobs in the City by 2040 with even faster growth in the balance of the county. University research and the growing technology sectors within Raleigh support even greater business development in emerging industries. This section evaluates employment trends for the county, identifies key economic sectors and major employers, and provides projections for Raleigh's future employment based on regional land use coordination efforts.

4.1 Employment by Industry

In line with national trends, Wake County's employment in goods-producing industries has decreased (-3%) and employment in service-providing industries has increased (+3%) over the last 5 years (see Tables 4.1 and 4.2). The top three industries in both 2007 and 2012 were: Professional and Business Services; Education and Health Services, and; Trade, Transportation, & Utilities. The Leisure and Hospitality industry saw the largest annual percent change in employment (+3.4%) during this period.

Using the latest data from the 2007-2011 American Community Survey (ACS), Raleigh has a higher percentage of jobs in public administration; arts/entertainment, accommodation, and; finance, insurance, real estate than the percentages for Wake County, North Carolina, and the U.S (see Figure 4.1). Raleigh is also ahead of the state and the nation in percentage of professional, scientific, management, and administrative jobs and is just behind Wake County.

Table 4.1 Wake County Average Annual Employment by Industry, 2007 to 2012 (condensed)

	2007	Percent of Total	2012	Percent of Total	Annual Change 2007 to 2012
Goods-Producing	**58,499**	**13.5%**	**44,795**	**10.2%**	-5.2%
Natural Resources and Mining	1,489	0.3%	1,028	0.2%	-7.1%
Agriculture, Forestry, Fishing & Hunting	893	0.2%	788	0.2%	-2.5%
Mining	596	0.1%	240	0.1%	-16.6%
Construction	34,021	7.8%	25,204	5.7%	-5.8%
Manufacturing	22,989	5.3%	18,563	4.2%	-4.2%
Service-Providing	**376,077**	**86.5%**	**396,364**	**89.8%**	1.1%
Trade, Transportation, and Utilities	85,333	19.6%	84,710	19.2%	-0.1%
Utilities	1,390	0.3%	*	n/a	n/a
Wholesale Trade	20,397	4.7%	20,990	4.8%	0.6%
Retail Trade	51,096	11.8%	52,040	11.8%	0.4%
Transportation and Warehousing	12,451	2.9%	10,468	2.4%	-3.4%
Information	16,203	3.7%	17,447	4.0%	1.5%
Financial Activities	24,521	5.6%	25,030	5.7%	0.4%
Finance and Insurance	15,767	3.6%	17,298	3.9%	1.9%
Real Estate and Rental and Leasing	8,755	2.0%	7,732	1.8%	-2.5%
Professional and Business Services	83,755	19.3%	91,441	20.7%	1.8%
Professional and Technical Services	37,650	8.7%	42,177	9.6%	2.3%
Management of Companies & Enterprises	10,480	2.4%	10,142	2.3%	-0.7%
Administrative and Waste Services	35,625	8.2%	39,122	8.9%	1.9%
Education and Health Services	82,388	19.0%	88,177	20.0%	1.4%
Educational Services	37,845	8.7%	40,420	9.2%	1.3%
Health Care and Social Assistance	44,546	10.3%	47,758	10.8%	1.4%
Leisure and Hospitality	42,847	9.9%	50,765	11.5%	3.4%
Arts Entertainment and Recreation	6,543	1.5%	9,293	2.1%	7.3%
Accommodation and Food Services	36,304	8.4%	41,473	9.4%	2.7%
Public Administration	38,646	8.9%	38,789	8.8%	0.1%
Unclassified	2,384	0.5%	5	0.0%	-70.9%
TOTAL	**434,576**	**100.0%**	**441,159**	**100.0%**	**0.3%**

* No data available

Source: North Carolina Division of Employment Security

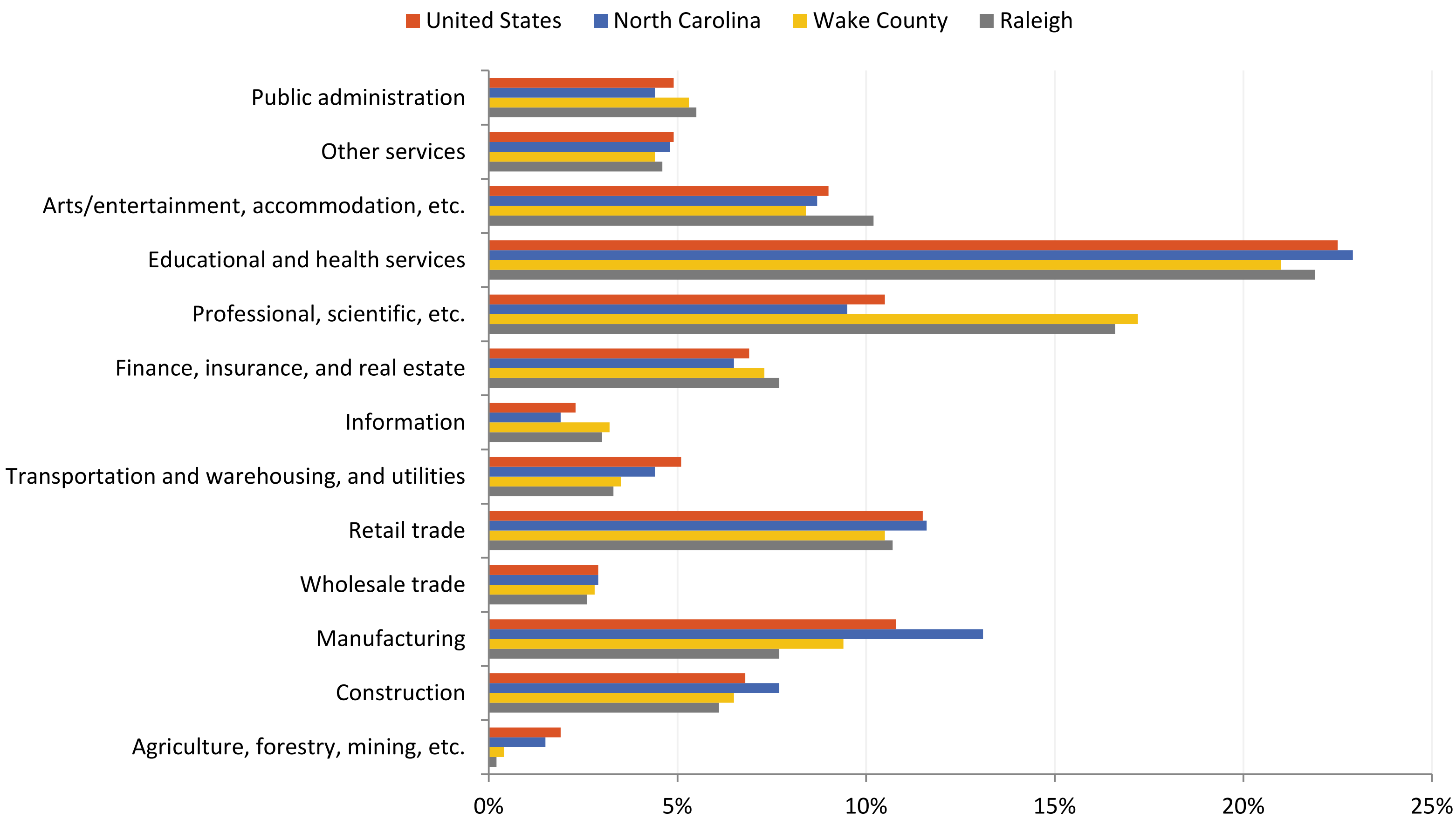
Table 4.2 Wake County Annual Average Employment by Industry, 2007 to 2012

	2007	2008	2009	2010	2011	2012
Goods-Producing	**58,499**	**57,004**	**47,434**	**44,226**	**44,837**	**44,795**
Natural Resources and Mining	1,489	1,453	1,447	1,032	1,007	1,028
Agriculture Forestry Fishing & Hunting	893	881	899	770	749	788
Mining	596	572	548	263	258	240
Construction	34,021	31,870	25,267	24,078	24,506	25,204
Manufacturing	22,989	23,681	20,720	19,116	19,324	18,563
Service-Providing	**376,077**	**380,441**	**371,935**	**374,055**	**383,391**	**396,364**
Trade Transportation and Utilities	85,333	84,187	80,066	80,011	82,110	84,710
Utilities	1,390	1,397	1,363	1,394	1,397	*
Wholesale Trade	20,397	19,898	18,563	18,192	19,152	20,990
Retail Trade	51,096	51,633	49,435	49,775	51,037	52,040
Transportation and Warehousing	12,451	11,258	10,708	10,652	10,524	10,468
Information	16,203	16,527	16,461	16,333	16,963	17,447
Financial Activities	24,521	25,660	25,375	25,666	25,142	25,030
Finance and Insurance	15,767	16,958	17,250	17,971	17,463	17,298
Real Estate and Rental and Leasing	8,755	8,702	8,125	7,695	7,680	7,732
Professional and Business Services	83,755	82,125	78,473	81,028	85,987	91,441
Professional and Technical Services	37,650	38,808	36,852	37,086	39,563	42,177
Management of Companies & Enterprises	10,480	10,089	9,553	9,613	10,232	10,142
Administrative and Waste Services	35,625	33,228	32,068	34,329	36,192	39,122
Education and Health Services	82,388	85,914	85,467	84,394	85,780	88,177
Educational Services	37,845	39,921	39,575	38,959	39,388	40,420
Health Care and Social Assistance	44,546	45,993	46,989	45,435	46,392	47,758
Leisure and Hospitality	42,847	43,939	45,285	45,801	47,918	50,765
Arts Entertainment and Recreation	6,543	6,892	8,847	8,831	9,105	9,293
Accommodation and Food Services	36,304	37,047	36,439	36,970	38,813	41,473
Public Administration	38,646	39,588	39,551	40,553	39,491	38,789
Unclassified	2,384	2,501	1,257	269	*	5
TOTAL	**434,576**	**437,445**	**419,369**	**418,281**	**428,228**	**441,159**

* No data available

Source: North Carolina Division of Employment Security

Figure 4.1 Jobs by Industry Comparison, 2011



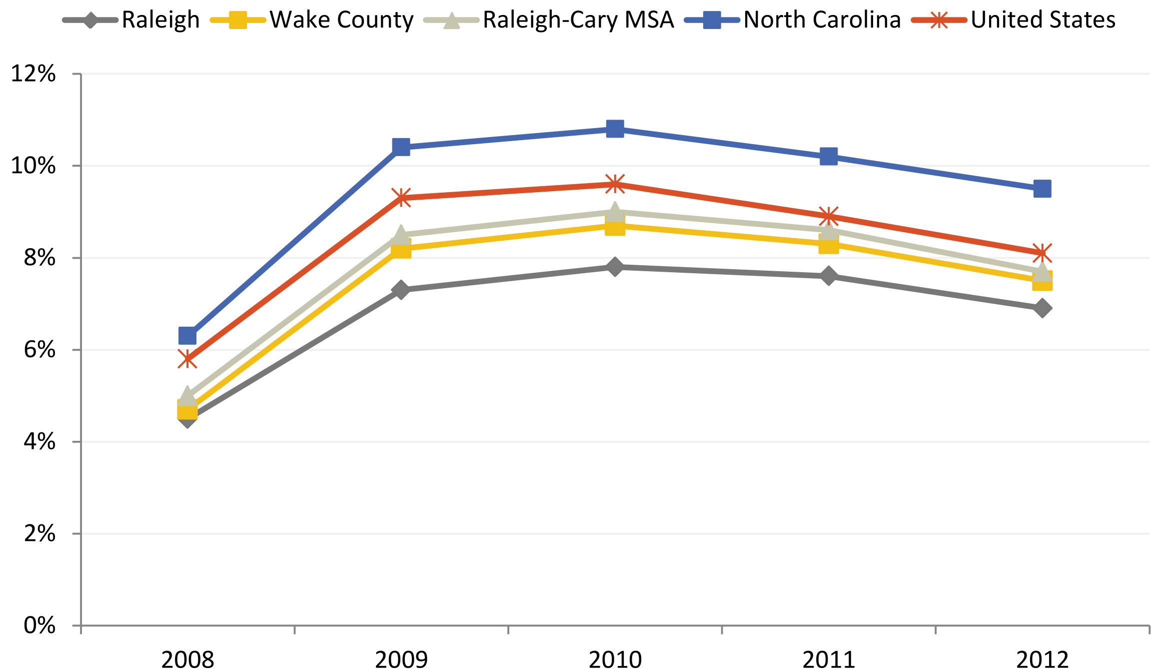
Source: 2007 - 2011 American Community Survey, 5-year Estimates

4.2 Unemployment Rates and Employment Projections

From 2007 to 2012, Raleigh's unemployment rate remained lower than Wake County, the Raleigh-Cary MSA, North Carolina, and the U.S (see Figure 4.2). In Raleigh, the unemployment rate climbed from 3.4% in 2007 to a high of 7.8% in 2010; the 2012 average unemployment rate fell to 6.9%.

According to a model put together by the Capital Area Metropolitan Planning Organization (CAMPO) with input from municipalities across the Triangle region, Raleigh is expected to add over 100,000 jobs from 2010 to 2040, an average increase of 1% every year (see Table 4.4 and Figure 4.3). Although Raleigh is expected to add the most jobs in the region in terms of raw numbers, several counties are expected to have higher annual job growth rates, including Chatham County, Granville County, Nash County, and Harnett County. Looking at the types of projected new jobs, the model shows the following breakdown for new jobs created in Raleigh during the 2010-2040 time period: 66% in the service sector, 16% in office, 7% in retail, 6% in industrial, and 5% in highway (see Table 4.4). More information on the employment projection model can be found here: http://www.campo-nc.us/population-employment-forcast.html.

Figure 4.2 Average Annual Unemployment Rates, 2007 to 2012



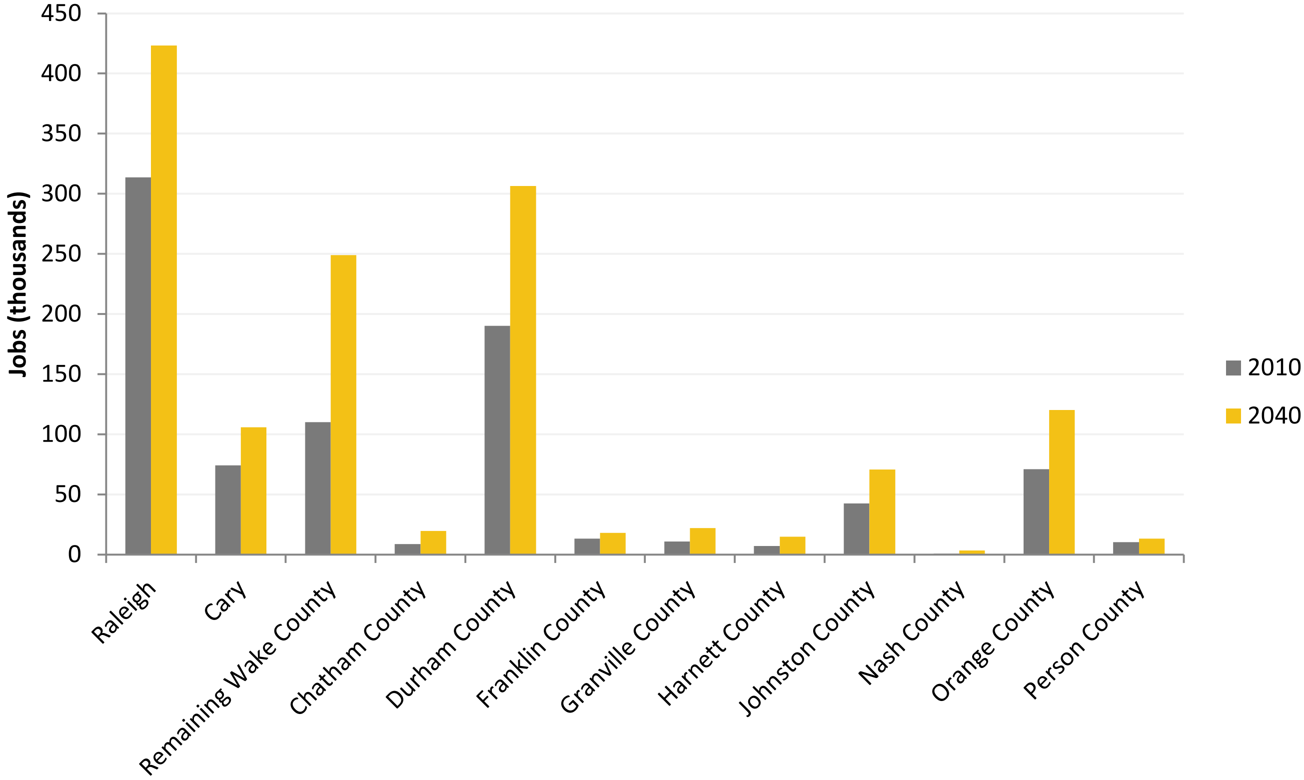
Source: North Carolina Division of Employment Security

Table 4.3 Triangle Region Interim Employment Projections, 2010 to 2040

Place	2010	2020	2030	2040	Average Annual Growth 2010 to 2040
Raleigh	313,538	344,590	380,921	423,245	1.0%
Cary	74,112	83,111	93,619	105,872	1.2%
Wake County	497,634	577,053	669,927	778,175	1.5%
Chatham County	8,775	11,610	15,142	19,533	2.7%
Durham County	190,134	222,344	260,827	306,524	1.6%
Franklin County	13,164	14,486	16,039	17,868	1.0%
Granville County	10,870	14,059	17,730	21,954	2.4%
Harnett County	7,139	9,144	11,616	14,650	2.4%
Johnston County	42,345	49,486	58,687	70,730	1.7%
Nash County	705	1,362	2,204	3,261	5.2%
Orange County	70,984	84,064	100,225	120,274	1.8%
Person County	10,352	11,147	12,060	13,093	0.8%

Source: Capital Area Metropolitan Planning Organization (CAMPO)

Figure 4.3 Triangle Region Employment Projections, 2010 and 2040



Note: Remaining Wake County excludes Raleigh and Cary

Source: Capital Area Metropolitan Planning Organization (CAMPO)

Table 4.4 Sector Share of Projected New Jobs, 2010-2040

Place	Industrial	Office	Service	Retail	Highway	Total
Raleigh	6%	16%	66%	7%	5%	100%
Unincorporated Wake County	10%	9%	71%	4%	6%	100%
Other jurisdictions	9%	11%	64%	7%	10%	100%
Countywide Total	8%	13%	65%	7%	8%	100%

Source: Capital Area Metropolitan Planning Organization (CAMPO)

4.3 Major Employers and New & Expanding Companies

The major employers in Wake County are concentrated in the following industries: public administration; education & health services; professional and business services; information, and; trade, transportation, and utilities (see Table 4.4).

In 2012, 32 major companies announced either new operations or expansions of present operations in Raleigh with an estimated dollar investment of over $151 million and an estimated 2,376 new jobs added to the workforce (see Table 4.5).

Table 4.4 Wake County Major Employers, 2012

Rank	Name	Employment (approximate)	Industry	Location in Raleigh
1	State of North Carolina	24,739	Public Administration	Yes
2	Wake County Public School System	17,572	Education & Health Services	Yes
3	IBM Corporation	10,500	Professional and Business Services, Information	No
4	North Carolina State University	7,730	Education & Health Services	Yes
5	WakeMed Health & Hospitals	7,607	Education & Health Services	Yes
6	GlaxoSmithKline	4,900	Professional and Business Services	No
7	Rex Healthcare	4,800	Education & Health Services	Yes
8	SAS Institute, Inc.	4,742	Information	No
9	Wake County Government	4,272	Public Administration	Yes
10	Cisco Systems	3,800	Professional and Business Services, Information	No
11	City of Raleigh	3,000	Public Administration	Yes
12	Verizon Business	3,000	Information	Yes
13	Duke Energy Progress	2,500	Trade, Transportation & Utilities	Yes
14	Affiliated Computer Services	2,300	Professional and Business Services	Yes (call center)
15	RTI International	2,200	Professional and Business Services	Yes (call center)
16	Fidelity Investments	2,200	Financial Activities	Yes
17	U.S. Environmental Protection Agency	2,000	Public Administration	No

Source: Greater Raleigh Chamber of Commerce/Wake County Economic Development

Table 4.5 New & Expanding Companies in Raleigh, 2012

Company Name	New Jobs	Investment ($ millions)	New or Expanding	Industry
Bandwidth.com	200	n/a	Expanding	Information
Beeken Biomedical	5	n/a	New	Professional & Business Services
Brooks Bell	3	n/a	Expanding	Professional & Business Services
Bulk TV & Internet	45	n/a	Expanding	Information
Carolinas IT	8	n/a	Expanding	Professional & Business Services; Information
Citrix Systems	337	$26	Expanding	Professional & Business Services; Information
CV Moss Inc.	15	n/a	New	Professional & Business Services
DataChambers	n/a	n/a	New	Professional & Business Services; Information
Duke Raleigh Hospital	n/a	n/a	Expanding	Educational & Health Services
Forever Home LLC	15	n/a	Expanding	Financial Activities
Gray Construction	5	n/a	New	Construction
INC Research	300	n/a	Expanding	Professional & Business Services
JouleBug	14	n/a	New	Information
MedPro Rx	9	n/a	Expanding	Professional & Business Services
Ming Yang Wind Power Group	20	$15	New	Manufacturing; Professional & Business Services
National Power Corporation	n/a	n/a	Expanding	Trade Transportation and Utilities
Nexsen Pruet	7	n/a	Expanding	Professional & Business Services
PRA International	n/a	n/a	Expanding	Professional & Business Services
Progressive Benefit Solutions	7	n/a	Expanding	Professional & Business Services
Prometheus Group	38	n/a	Expanding	Information
Qualcomm Inc.	140	n/a	Expanding	Manufacturing
Raleigh Brewing Company	1	n/a	Expanding	Manufacturing
RC4 Wireless	n/a	n/a	New	Manufacturing
Red Hat	540	$109	Expanding	Information
RTI International	400	n/a	Expanding	Professional & Business Services

SRS Roofing Supply	n/a	n/a	Expanding	Trade Transportation and Utilities
Storr Office Environments	15	n/a	Expanding	Trade Transportation and Utilities
The Select Group	34	n/a	Expanding	Professional & Business Services
TheeDesign Studio	2	n/a	Expanding	Professional & Business Services
TriMark Solutions	15	$1.3	Expanding	Professional & Business Services
WakeMed Health & Hospitals	64	n/a	Expanding	Educational & Health Services
Workplace Options	137	n/a	Expanding	Professional & Business Services
Total:	**2,376**	**$151.3**		

Source: Greater Raleigh Chamber of Commerce/Wake County Economic Development

4.4 Non-Residential Building Activity & Cost of Living

Excluding the "other" category (parking garages, out buildings, cell phone towers, etc.; see Table 4.10), non-residential building activity as measured in permits issued has trended downward over the last six years (see Tables 4.6 – 4.9). After lows in number of permits, square footage, and construction value in 2010, office building activity trended upward in all three categories in 2011 and 2012 (see Table 4.7). The office building category also had the highest square footage and construction value for all six years combined as well as for 2012. Commercial buildings had the second-highest number of permits issued during the six-year period - institutional buildings had the highest number of permits (see Table 4.9) - and came in second in terms of square footage and construction value (see Table 4.6). The total construction value for non-residential buildings was approximately $160 million in 2012 (see Table 4.11).

Looking at the Council for Community and Economic Research's (C2ER) 2012 Cost of Living Index, Raleigh has a lower composite cost of living score than peer cities such as Atlanta, GA Austin, TX, Charlotte, NC, and Richmond, VA (see Table 4.12). Raleigh had a very low cost of housing score as compared to the national average and its peer cities.

Table 4.6 Raleigh Commercial Building Activity, 2007 to 2012

Year	No. of Permits	Square Feet	Construction Value
2007	56	1,357,355	$190,443,492
2008	47	1,494,755	$150,132,467
2009	30	691,702	$101,233,024
2010	25	669,286	$99,136,446
2011	20	317,563	$30,390,667
2012	10	277,020	$28,680,914
TOTAL	**188**	**4,807,681**	**$600,017,010**

Source: City of Raleigh Inspections Department

Table 4.7 Raleigh Office Building Activity, 2007 to 2012

Year	No. of Permits	Square Feet	Construction Value
2007	55	1,073,572	$81,385,165
2008	48	2,269,863	$178,803,437
2009	30	517,432	$44,230,191
2010	11	1,077,530	$237,682,996
2011	18	398,962	$38,756,590
2012	19	686,796	$52,249,057
TOTAL	**181**	**6,024,155**	**$633,107,436**

Source: City of Raleigh Inspections Department

Table 4.8 Raleigh Industrial Building Activity, 2007 to 2012

Year	No. of Permits	Square Feet	Construction Value
2007	40	659,898	$37,177,945
2008	12	151,908	$9,270,036
2009	9	141,810	$7,789,500
2010	7	170,680	$10,182,575
2011	7	33,913	$1,276,400
2012	5	124,327	$5,485,533
TOTAL	**80**	**1,282,536**	**$71,181,989**

Source: City of Raleigh Inspections Department

Table 4.9 Raleigh Institutional Building Activity, 2007 to 2012

Year	No. of Permits	Square Feet	Construction Value
2007	56	592,216	$80,695,549
2008	68	482,000	$158,807,201
2009	27	697,327	$59,053,672
2010	29	415,985	$49,697,344
2011	30	280,692	$72,245,736
2012	14	104,310	$13,953,376
TOTAL	**224**	**2,572,530**	**$434,452,878**

Source: City of Raleigh Inspections Department

Table 4.10 Raleigh Other* Building Activity, 2007 to 2012

Year	No. of Permits	Square Feet	Construction Value
2007	171	1,813,719	$65,301,239
2008	135	1,989,683	$166,667,759
2009	76	1,040,954	$31,560,301
2010	72	255,093	$8,686,844
2011	108	553,061	$24,449,866
2012	128	980,698	$59,194,918
TOTAL	**947**	**8,688,980**	**$465,100,934**

Source: City of Raleigh Inspections Department
**Includes parking garages, out buildings, cell phone towers, etc.*

Table 4.11 Raleigh All Non-Residential Building Activity, 2007 to 2012

Year	No. of Permits	Square Feet	Construction Value
2007	378	5,496,760	$455,003,390
2008	310	6,388,209	$663,680,900
2009	172	3,089,225	$243,866,688
2010	144	2,588,574	$405,386,205
2011	183	1,584,191	$167,119,259
2012	176	2,173,151	$159,563,798
TOTAL	**1,363**	**21,320,110**	**$2,094,620,240**

Source: City of Raleigh Inspections Department

Table 4.12 Metro Area Cost of Living Index Comparison, 2012 Annual Average Data

	100% Composite Index	Grocery Items	Housing	Utilities	Transportation	Health Care	Misc. Goods & Services
Raleigh, NC	90.8	101.0	71.5	104.8	95.9	93.6	95.7
Atlanta, GA	96.9	106.4	84.2	93.2	105.0	101.1	101.1
Austin, TX	95.6	89.7	87.7	93.2	99.6	104.5	102.8
Charlotte, NC	94.7	103.2	81.3	100.1	96.9	97.4	99.4
Jacksonville, FL	96.7	100.0	84.7	104.3	108.5	87.3	100.0
Nashville-Franklin, TN	88.9	95.7	74.0	87.1	93.9	85.9	97.7
Orlando, FL	97.7	100.8	80.6	109.7	100.6	93.3	106.3
Richmond, VA	102.1	103.5	91.3	105.9	101.1	114.7	107.9
Rochester, NY	102.8	96.7	100	98.3	109.4	101.8	106.8

Source: Council for Community and Economic Research (C2ER), Cost of Living Index, 2012 Annual Average Data

Each quarter C2ER collects data and publishes cost of living information for participating Metro-Micro Urban Areas in the United States. To determine overall cost of living, the relative affordability of certain items (groceries, housing, utilities, transportation, health care, and miscellaneous goods and services) are indexed and a composite figure is calculated and then compared to the national average of 100. Since the index does not measure inflation and each quarterly report is a "snap shot" of a single point in time, index data from different quarters should not be compared.

Chapter 5: Housing and Neighborhoods

The City of Raleigh carries out several programs to increase the supply of affordable housing and stabilize and improve older neighborhoods that need additional resources. Many of these programs have been successful due to the City's partnership with other governmental entities, for profit and nonprofit organizations, and local residents.

The ultimate goal of housing programs is to increase housing opportunities for existing and future residents and to create diverse neighborhoods of choice that attract new investment and which do not exclude residents due to housing costs or discriminatory practices.

5.1 Housing Affordability

Based on the 2007-2011 American Community Survey, 48% of Raleigh's renter households pay more than 30% of their income in housing costs compared to 27% for owner households (see Table 5.1). Households with annual income of less than $50,000 – both renter and owner – are particularly burdened by housing costs. Comparing the fair market rent for a 1-bedroom apartment in the Raleigh metro area to affordable housing costs (30% of income) for renter households making less than $35,000 reveals a significant affordability gap (see Table 5.2).

Table 5.1 Raleigh Households Below $50,000 Annual Income with 30%+ Cost Burden, 2011

Renters Annual Income Category	Total Renter Households	Number of Burdened Households	Percent of Burdened Households
Less than $10,000	7,898	6,179	78%
$10,000 to $19,999	11,714	10,631	91%
$20,000 to $34,999	17,826	13,405	75%
$35,000 to $49,999	13,447	3,492	26%
All Households <$50,000	**50,885**	**33,707**	**66%**
$50,000 or more	20,739	1,023	5%
All Households	**71,624**	**34,730**	**48%**

Owners Annual Income Category	Total Owner Households	Number of Burdened Households	Percent of Burdened Households
Less than $20,000	4,545	3,955	87%
$20,000 to $34,999	7,923	5,482	69%
$35,000 to $49,999	10,665	5,817	55%
All Households <$50,000	**23,133**	**15,254**	**66%**
$50,000 or more	63,415	8,334	13%
All Households	**86,548**	**23,588**	**27%**

Source: 2007 - 2011 American Community Survey 5-year Estimates, Table B25074, Household Income by Gross Rent as a Percentage of Household Income; Table B25106, Tenure by Housing Costs as a Percentage of Household Income

Table 5.2 Comparison of Renter Household Income, Affordable Housing Costs, and Fair Market Rent

Annual Income Category	Total Renter Households	Affordable Housing Costs at 30% of Income	Fair Market Rent for 1 Bedroom Apartment*	Affordability Gap
Less than $10,000	7,898	$250 (based on $10,000)	$779	($529)
$10,000 to $19,999	11,714	$375 (based on $15,000)	$779	($404)
$20,000 to $34,999	17,826	$687 (based on $27,500)	$779	($92)

** This figure is for the Raleigh-Cary Metropolitan Statistical Area (MSA).*
Source: 2007 - 2011 American Community Survey, 5-year Estimates; U.S. Department of Housing and Urban Development, FY2011 Fair Market Rent Documentation System

Table 5.3 Number of Assisted Affordable Housing Units

City of Raleigh Affordable Rental Units	193
Raleigh Housing Authority Units	1,372
Rental Units with Funding from HUD (e.g. Section 202)	1,101
Low-Income Housing Tax Credit (LIHTC) Units (no City funds)	1,974
Rental Units with Funding from City of Raleigh (Joint Venture)	2,956
Homeownership Units with Funding from City of Raleigh	474
Second Mortgages Provided by City of Raleigh	890
Raleigh Housing Authority Housing Choice Vouchers (Section 8)	3,869
Total	**12,829**

Source: City of Raleigh Community Development Department, 2013

5.2 Home Sales, Average Rent, Residential Building Activity

In constant dollars, the median sales price for single-family detached units has increased from 2008 to 2012 despite fluctuations in the intervening years (see Table 5.4). Median sales prices for townhouses and condominiums both decreased over this time period, although, again, there were yearly fluctuations. Single-family detached homes and townhouses both saw increases in median sales price from 2011 to 2012, while the median sales price for condominiums dropped (see Table 5.5).

Looking at residential sales by price range, the highest number of single family homes sold during 2012 had a price tag between $150,001 and $200,000 (see Table 5.6). The price range category for townhouses with the highest number of sales was $100,001 to $150,000, while condominiums had the highest number of sales in the $25,000 to $100,000 category. For all residential units combined, the largest number of sales was in the $150,001 to $200,000 category.

Cost of living data from the Council on Community and Economic Research indicates that average rents for the Raleigh metro area have steadily decreased over the last 6 years (see Table 5.7). In 2012, average rent in the area was estimated to be $635.

Looking at residential permit activity for 2012, apartments represented the largest category in terms of permit numbers (3,806, or 72% of all residential building permits issued), square footage (2,724,241), and construction value ($264,561,168) (see Table 5.8).

Table 5.4 Median Sales Price by Unit Type, 2008 – 2012 (in 2012 dollars)

	2008	2009	2010	2011	2012
Single-Family Detached	$227,671	$229,554	$234,800	$218,000	$230,000
Townhouse	$168,487	$166,949	$170,572	$151,000	$157,000
Condominium	$152,492	$145,545	$141,090	$134,500	$135,000

Source: Wake County Revenue Department

Table 5.5 Percent Change in Median Sales Price by Unit Type, 2008-2012 (using 2012 dollars)

	2008 to 2009	2009 to 2010	2010 to 2011	2011 to 2012
Single-Family Detached	1%	2%	-5%	3%
Townhouse	-1%	2%	-10%	2%
Condominium	-5%	-3%	-3%	-2%

Source: Wake County Revenue Department

Table 5.6 Numbers of Residential Sales by Price Range and Type of Unit, 2012

Price Range of Sales	Single Family	Townhouse	Condo	All Units
$25,000 - $100,000	76	90	116	**282**
$100,001 - $150,000	397	435	92	**924**
$150,001 - $200,000	632	372	38	**1,042**
$200,001 - $250,000	516	143	31	**690**
$250,001 - $300,000	295	53	40	**388**
$300,001 - $350,000	258	38	29	**325**
$350,001 - $400,000	160	14	13	**187**
over $400,000	502	9	35	**546**
Total	**2,836**	**1,154**	**394**	**4,384**

Source: Wake County Revenue Department

Table 5.7 Raleigh-Cary Metropolitan Area Annual Average Apartment Rent, 2007 to 2012

Year	Average Rent (current dollars)	Average Rent (constant 2012 dollars)
2007	$739	$818
2008	$710	$757
2009	$700	$749
2010	$676	$712
2011	$656	$670
2012	$635	$635

Source: Council for Community and Economic Research (C2ER), Cost of Living Index, Annual Average Data

Table 5.8 Raleigh Residential Building Activity, 2012

Residential Type	No. of Permits	Square Feet	Construction Value
Single Family	783	2,724,241	$246,986,984
Townhouse	618	1,331,735	$67,076,310
2-family	4	4,200	$399,000
3 & 4 family	39	63,882	$3,189,896
Condominium	23	61,289	$5,616,277
Apartment	3,806	4,732,610	$264,561,168
TOTAL	**5,273**	**8,917,957**	**$587,829,635**

Source: City of Raleigh Inspections Department

Chapter 6: Transportation

This section of the Raleigh Data Book provides an overview of existing and planned transportation investments and identifies the primary challenges facing the City of Raleigh's transportation system within a regional context.

6.1 Regional Context

The performance of the transportation system is a major factor for a community's economic prosperity and quality of life. Not only does the transportation system provide for the mobility of people and goods, but over the long term, it influences patterns of growth and the level of economic activity. The Comprehensive Plan as well as adopted specialized transportation plans and studies helps Raleigh guide future development of its roads and highways, public transportation systems, and bicycle and pedestrian networks. Together, all of these modes of transportation provide mobility and accessibility in support of the desired land use patterns and community form.

The City of Raleigh depends on several organizations for transportation planning and implementation. The key organizations involved with transportation planning and implementation are:

- Capital Area Metropolitan Planning Organization (CAMPO): long range planning, capital improvement planning
- North Carolina Department of Transportation (NCDOT): long range planning, capital improvement planning, construction/implementation
- City of Raleigh: long range planning, capital improvement planning, construction/implementation
- Triangle Transit: long range planning, capital improvement planning, construction/implementation

6.2 Current Projects

The transportation capital program includes major street construction, street improvements, pedestrian and bicycle projects, downtown parking improvements, and transit projects. Total proposed funding for the five-year transportation program is $63.5 million, with $27.9 million planned for FY 2014.

The Capital Improvement Program (CIP) continues the implementation of the $40 million Transportation Bond approved by Raleigh residents in October 2011. These bond proceeds fund street resurfacing, street improvements, greenway projects, transit facility improvements, sidewalk installations, and planning studies. The CIP includes over $10 million for major street construction. Each project is consistent with the adopted goals of the 2030 Comprehensive Plan and incorporates "Complete Streets" principles, which integrate bicycle, pedestrian and transit system elements into each project (see Table 6.2 for current projects).

An increase in facility fee revenues has allowed for the acceleration of the Buck Jones Road widening project by one year in this program. The CIP also includes matching city funds on two planned North Carolina Department of Transportation (NCDOT) highway improvement projects. These projects are the widening of the I-440 Beltline in southwest Raleigh, and improvements to the US 70 Corridor from Duraleigh Road to I-540. The street improvements program of the transportation program is funded at $34.7 million. Projects include street resurfacing, street improvements, petition paving projects, traffic signal installations, intersection improvements, and median improvements.

The bicycle, pedestrian & planning improvements program of the transportation program includes $14 million for sidewalk construction, maintenance, and repair, streetlight installations, and bicycle facility improvements. Funds are also allocated for city matches to federal grant projects and future NCDOT bridge replacement projects. Bond proceeds from the 2011 Transportation Bond will fund many of the city's proposed sidewalk projects, which will be prioritized based on the City's new Comprehensive Pedestrian Plan. The bicycle program continues to implement the recommendations of the City's adopted Bicycle Comprehensive Plan.

The CIP has $9.6 million for transit system planning, system maintenance, equipment, and facilities. This includes an additional $3 million commitment for development planning of the Union Station multi-modal transit center and associated area improvements. This is in addition to the $3 million allocated in FY13 from the 2011 Transportation Bond, bringing the City's total commitment to Union Station to $6 million.

Bond proceeds will also fund renovations at the City's Moore Square Station. The parking improvements element includes $3.2 million for security improvements and maintenance for the downtown parking decks. In addition to bond proceeds, transportation projects are funded with facility fees, construction-related assessments, and the local share of the state gasoline tax (Powell Bill). In FY 2014, selected projects are funded with one-time transfers from the General Fund. This includes $3 million for Union Station, as well as funding for sidewalk repair and transit facilities.

Table 6.1 Federal and State Grant Allocations, 2006 to the Present

Project Description	STP-DA[1]	NCDOT[2]	CMAQ[3]	TIGER[4]
Falls of Neuse Road Realignment and Widening	X			
COR Bicycle Transportation Plan		X		
COR Pedestrian Plan		X		
Sidewalk Improvement Projects	X			
Wade Avenue Improvement Project	X			
Priority Bicycle Striping Projects	X			
Bicycle Parking Spot Improvement Grant		X		
Lake Wheeler Road Improvements	X			
Creedmoor Road Sidewalk Improvements	X			
I-40 Overpass Pedestrian Retrofits/Improvements			X	
Capital Boulevard Improvements	X			
Six Forks Road Sidewalk Improvements			X	
Downtown Pedestrian Safety Improvements	X			
Citywide Bicycle Improvement Projects			X	
Union Station Phase 1		X		X

[1]STP-DA: Surface Transportation Program - Direct Allocation
[2]NCDOT: North Carolina Department of Transportation
[3]CMAQ: EPA Congestion Mitigation and Air Quality Improvement Program
[4]TIGER: USDOT Transportation Investment Generating Economic Recovery

Source: City of Raleigh Transportation Planning

Table 6.2 Selected Current Transportation Projects

Project Name	From	To	Project Description
Street Projects			
Wade Avenue improvements	Faircloth St.	Ridge Road	Install curb and gutter, sidewalk on north side and multi-use path on south side
Buck Jones Road widening	Farm Gate Road	Xebec Way	Widen to 3 lanes with curb, gutter and sidewalks on both sides
Leesville Road widening	I-540	New Leesville Blvd.	Widen to 4 lane, median divided roadway with curb, gutter and sidewalks on both sides
Marvino Lane	Existing Marvino Lane	US 70 (Glenwood Ave.)	New alignment as a 3 lane roadway with curb and gutter, and sidewalk on west side
Annual Paving Projects			
Project Name	**From**	**To**	**Project Description**
Freedom Drive/Rhyne Ct.	South of New Bern Ave.	End	41’ back to back, sidewalk on one side

Sanderford Road	2401 Sanderford Road	Elk Park Dr.	Curb and gutter, sidewalk on one side
Juniper Ct.	Juniper St.	End of cul-de-sac	22' back to back
Greyson St.	Dacian Road	Rose Lane	26' back to back, curb and gutter with sidewalk on one side
Norman Estates Way	Strickland Road	End of cul-de-sac	Private agreement: widen to 26' back to back with curb and gutter

Sidewalk Projects

Project Name	From	To	Project Description
Creedmoor Road	Glenwood Ave.	Strickland Road	Sidewalk construction, east side
Lake Wheeler Road	Centennial Parkway	Tryon Road	Sidewalk construction, west side and turn lane improvements
Green Road	New Hope Church Road	Spring Forest Road	Sidewalk construction, both sides
Clark Ave.	Woodburn	Bellwood	Sidewalk construction, both sides

Streetscape and Traffic Calming Projects

Project Name	From	To	Project Description
Peace St.	St. Mary's St.	West St.	Streetscape
Brookside Dr.	Watauga St.	Glascock St.	Traffic calming
Kaplan Dr.	Melbourne Road	Kent Road	Traffic calming
Glascock St.	Norris St.	N. Raleigh Blvd	Traffic calming

Source: City of Raleigh Transportation Planning

Chapter 7: Public Utilities

The City's public utilities are regional in nature. The City has merged utilities with all the municipalities in eastern Wake County including Garner, Rolesville, Wake Forest, Knightdale, Wendell, and Zebulon. Further, the Towns of Fuquay-Varina and Holly Springs periodically rely on the City for potable water supply. It is obvious that planning the infrastructure of the entire water system must be with the perspective of the entire region in mind.

7.1 Wastewater System and Water Demand & Treatment

The city of Raleigh operates four wastewater treatment plants. Table 7.1 shows the historical throughput – amount treated in millions of gallons per day (MGD) for each plant. The maximum capacity for these plants is as follows:

- Neuse River WWTP: 60 MGD
- Wrenn Road WWTP: 1.2 MGD
- Little Creek WWTP: 1.85 MGD
- Smith Creek WWTP: 2.4 MGD

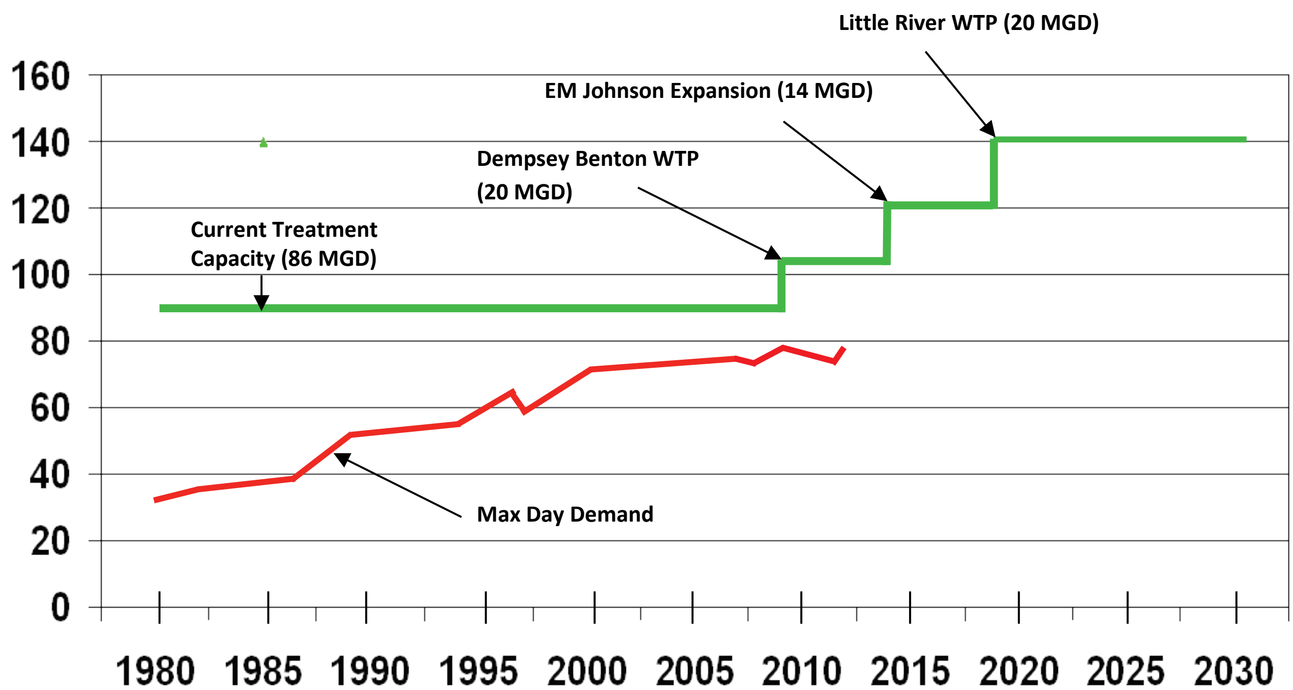
Table 7.1 Historical Wastewater Treatment Throughput, 2000 to 2012

Year/Facility	Neuse River WWTP (MGD)	Wrenn Rd WWTP (MGD)	Little Creek WWTP (MGD)	Smith Creek WWTP (MGD)
2000	36.16	-	0.853	1.330
2001	35.61	0.814	0.757	1.331
2002	37.39	0.911	0.816	1.399
2003	44.30	0.999	0.930	0.442
2004	45.50	0.846	0.715	0.691
2005	46.20	0.904	0.580	0.713
2006	44.80	0.978	0.591	1.026
2007	42.01	0.960	0.552	1.040
2008	40.87	0.564	0.592	1.105
2009	42.46	0.055	0.664	1.206
2010	43.84	0.692	0.692	1.233
2011	41.59	0.616	0.616	1.293
2012	41.91	0.625	0.625	1.326

Source: City of Raleigh Public Utilities Department

Figure 7.1 shows current water treatment capacity, future expansions for treatment facilities, and historical water demand.

Figure 7.1 Maximum Daily Demand & Treatment Capacity



Source: City of Raleigh Public Utilities Department

Chapter 8: Environmental Resources

This chapter addresses Raleigh's natural and environmental resources and the challenges that need to be addressed to protect these resources. It begins with a look at watershed conditions and then provides a snapshot of air quality, water consumption and conservation, and greenhouse gas emissions.

8.1 Existing Watershed Conditions

Table 8.1 provides 2005 and 2010 water quality information for the portions of the Neuse River within Wake County. The Neuse River is the most significant water system among the city's watersheds which include: Buffalo Creek, Crabtree Creek, Little River, Marks Creek, Middle Creek, Moccasin Creek, Swift Creek, and Walnut Creek.

Table 8.1 Bioclassification for Rivers & Streams in Wake County's Portion of the Neuse River Subbasin

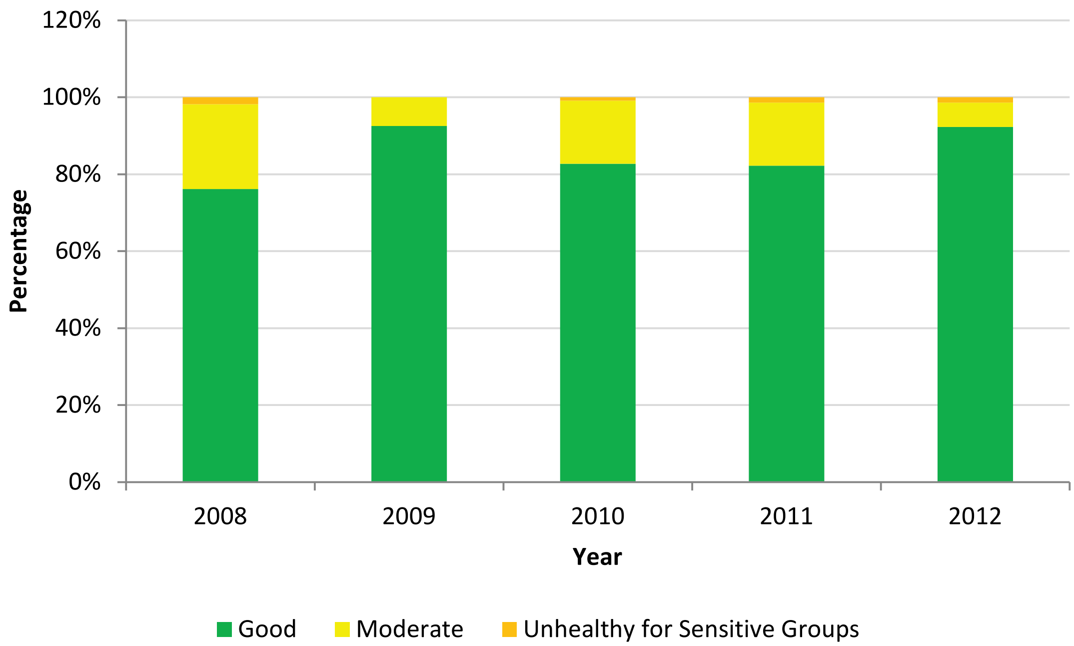
Water Body	Monitoring Location	2005	2010
Crabtree Creek	NC 54	Poor	Not Sampled
Crabtree Creek	Umstead Park	Good-Fair	Good-Fair
Crabtree Creek	US 1	Fair	Not Sampled
Crabtree Creek	SR 1664	Excellent	Excellent
Little River	SR 2224	Good	Good
Little River	NC 96	Good-Fair	Not Sampled
Marsh Creek	Near US 1	Fair	Not Sampled
Middle Creek	SR 1375	Good-Fair	Good-Fair
Middle Creek	SR 1375	Excellent	Good-Fair
Neuse River	US 401	Good-Fair	Good
Neuse River	US 64	Good-Fair	Good-Fair
New Light Creek	SR 1912	Good-Fair	Good-Fair
New Light Creek	SR 1911	Good	Good
Perry Creek	SR 2006	Fair	Fair
Richland Creek	US 1	Excellent	Good-Fair
Smith Creek	SR 2045	Good-Fair	Fair
Smith Creek	SR 2045	Fair	Good
Swift Creek	SR 1152	Fair	Fair (2009)
Swift Creek	SR 1152	Fair/Good-Fair	Good-Fair
Toms Creek	SR 2044	Poor	Not Sampled
Terrible Creek	SR 2751	Good	Good
Upper Barton Creek	NC 50	Fair	Fair
Upper Barton Creek	NC 50	Good	Good-Fair
Walnut Creek	SR 2442	Fair	Fair
Walnut Creek	SR 1348	Poor (1995)	Fair
Walnut Creek	South State Street	----	Fair
Walnut Creek	SR 2544	Good-Fair	Good-Fair
Walnut Creek	SR 1348	Poor (1995)	Fair

Source: North Carolina Department of Environment and Natural Resources, Division of Water Quality, Environmental Sciences Section, "Basinwide Assessment Report Neuse River Basin", January 2012

8.2 Air Quality

Two large air quality problems in North Carolina are ground-level ozone (the primary ingredient in "smog") and particulate matter. Both pollutants are caused by emissions from cars and trucks and from the fossil fuel burning power plants that supply most of our electricity. In 2008, 76% of recorded days were categorized at "good," while five years later in 2012 92% of days were categorized as "good" (see Figure 8.1 and Table 8.2). These readings are from the Millbrook Monitor, the only reporting station within the City of Raleigh.

Figure 8.1 Ozone Category Days



Source: U.S. Environmental Protection Agency, NC Department of Environment and Natural Resources

Table 8.2 Number of Ozone Rating Days 2008 - 2012, Millbrook Monitor

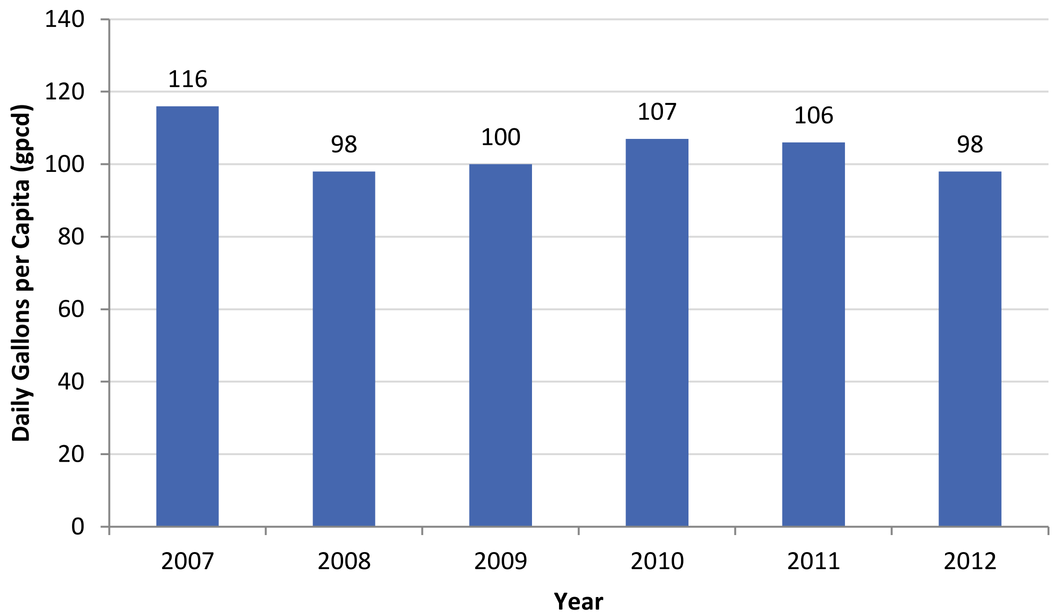
	Good	Moderate	Unhealthy for Sensitive Groups	Unhealthy
2008	163	47	4	0
2009	198	16	0	0
2010	177	35	2	0
2011	176	35	3	0
2012	191	13	3	0

Source: U.S. Environmental Protection Agency, NC Department of Environment and Natural Resources

8.3 Water Consumption and Conservation

The City of Raleigh has initiated several programs to help educate customers about the most water-efficient technologies and to understand the City's mandatory conservation measures. These programs include water efficiency tips, a WaterSense toilets rebate program, showerhead swap-out program, water conservation kit, and educational presentations, including the Sustainable Home Raleigh program. Efficiently using natural resources makes environmental sense and provides economic benefits by reducing energy costs in the treatment and pumping process of water. Water consumption as measured in daily gallons per capita (gpcd) has minimally fluctuated over the last 6 years, although the numbers have trended downward from 107 gpcd in 2010 to 98 gpcd in 2012 (see Figure 8.2).

Figure 8.2 Daily Water Consumption Aggregated by City Population



Source: City of Raleigh Public Utilities Department

8.4 Stormwater Management

Stormwater management must address the quantity as well as the quality of runoff water, commonly associated with rainwater falling and moving along impervious surfaces. The Stormwater Division manages stormwater services provided to the citizens of Raleigh through the City's stormwater utility, which includes the drainage and water quality assistance programs, capital stormwater projects, the water quality program mandated by the Clean Water Act, review and inspection of private developments for conformance to stormwater, soil erosion, and floodplain requirements, the drainage system inventory, and citizen inquiries concerning these functions.

The following lists some of the Stormwater Division's projects from Fiscal Year 2012-2013:

- Accelerated the NPDES permitted private industrial site and the City facility inspection programs to improve water quality under the National Pollutant Discharge Elimination System (NPDES) permit requirements in follow-up to EPA recommendations.
- Completed or closed out 12 stormwater projects at a cost of $9,000,000.
- More than 70 projects at an estimated cost of over $30 million are currently in the design or construction phase.
- Purchased a property at a cost of $1.2 million within the Capital Boulevard Corridor Plan Area to reduce flood damage and for stormwater/ greenway improvements.
- Awarded FEMA grants totaling over $2 million dollars to remove flooded structures on Capital Blvd. and Noble Road.

Table 8.3 Stormwater Management Services

	FY 09-10 Actual	FY 10-11 Actual	FY 11-12 Actual	FY 12-13 Estimate	FY 13-14 Projection
Stormwater projects designed/constructed	16	24	35	35	28
Stormwater projects reviewed	2,951	2,495	2,759	2,800	3,000
Stormwater inspections	8,729	9,165	8,392	8,300	8,300
Number of stormwater permits approved	1,626	1,787	1,050	1,025	1,100

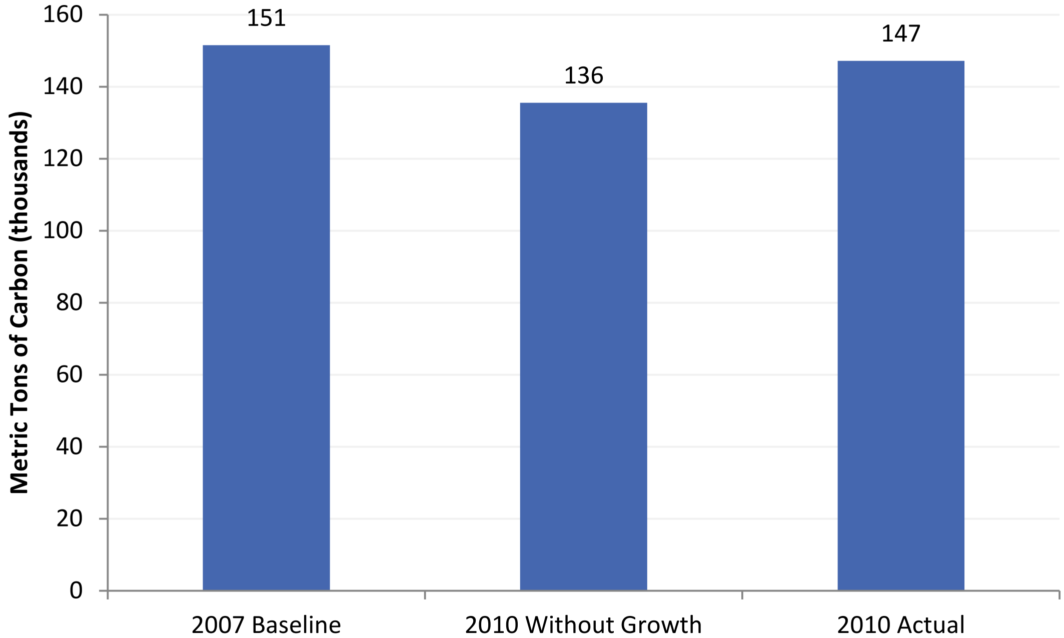
Source: Public Works, Stormwater Management Division

8.5 Greenhouse Gas Emissions

The City of Raleigh conducted a greenhouse gas emissions inventory for municipal operations in 2010. The base year selected for this emissions inventory was 2007. In that base year, City operations emitted 151,479 metric tons of carbon ($MTCO_2E$) to the atmosphere. Through implementation of a number of programs and projects, it is estimated that City operations reduced greenhouse gases emitted in 2010 by about 10% – an important achievement in the span of only a few years (see Figure 8.3).

This reduction was accomplished with relatively low capital expenditures, few impacts on City or department operations or budgets, no increased cost to customers, and no reduction in level of service to customers. Many of these projects were already underway prior to completion of the Greenhouse Gas Emissions Inventory for Municipal Operations.

Figure 8.3 Municipal Operations Greenhouse Gas Emissions



Source: City of Raleigh Community-Wide Greenhouse Gas Emissions Inventory: Years 2007 and 2010

Chapter 9: Parks & Recreation

9.1 Existing Parks and Recreation System and Planning Framework

The Raleigh parks and recreation system has over 6,000 acres of land providing 221 parks, open spaces and plazas and more than 3,750 acres of greenway property including 68 miles of trails. In 2004, Raleigh's Parks and Recreation Department completed an update of the Parks and Open Space element of the Raleigh Comprehensive Plan, known as the Raleigh Parks Plan. In September of 2012 the Parks and Recreation Department began the process to create a new Parks and Recreation System Plan. The new System Plan is expected to be completed in spring in 2014.

In May 2012, the City Council adopted enhancements to the Department's Public Participation in Park Planning Process, providing process guidance for the new System Plan. The new System Plan will be formatted with the City of Raleigh 2030 Comprehensive Plan, which was adopted in 2009.

The City's parks and greenways are invaluable resources for cultural pursuits, natural conservation and active and passive lifestyle activities. The Department of Parks and Recreation publishes the "Leisure Ledger" on a regular basis to provide a listing of the park and recreation program offerings and facilities available to the general public.

Park and greenway projects can be tracked on-line through the following webpage:
http://www.raleighnc.gov/home/content/PRecDesignDevelop/Articles/ParkAndGreenwayPlanningAndDevelopment.html

9.2 Parks and Recreation Facilities

Raleigh has one of the most well developed park systems in the Southeastern United States. The City's park system primarily consists of 50 neighborhood parks, 24 community parks, and 8 metro parks, encompassing approximately 3,695 acres of land. The park classification system is defined in the 2004 Raleigh Parks Plan as follows:

Neighborhood Park: Ranges in size from five to 25 acres and serves residents within a half-mile radius. The level of service guideline (LOS) is 2.6 acres per 1000 population.

Community Parks: Range in size from 30 to 75 acres and serves residents within a two mile radius. The LOS is 3.1 acres per 1000 population.

Metro Parks: Defined as providing a leisure or recreational opportunity, which, either by size, scale or theme, appeals to a majority of citizens. LOS is 4.2 acres per 1000 population.
Natural areas within Raleigh's parks are sub-classified in the following matter: 1) a Nature Preserve, an entire stand-alone park unit but captured above within "Metro Parks", 2) Protected Natural Areas; areas within the boundaries of other park units, or, 3) Greenway Corridor, a linear park feature typically associated with a stream or river system. The criteria for

Nature Preserves and Protected Natural Areas include the presence of significant species or habitats, proximity to other conservation lands, and special considerations such as partnerships and deed constraints. Nature Preserves are similar to Metro Parks and have a regional focus. They have been carefully evaluated using adopted criteria and are found to be worth of protection due to their natural resource attributes. Because of their unique character, Preserves do not have a LOS, but due to their regional appeal their acreage is included in the summary of Metro Parks.

The City's park system, detailed in Table 9.1, is supplemented by an additional 101 special parks that range in size, theme and scale, and include small parcels of land along city streets, in neighborhoods, and linked to public buildings. Additionally, parks and recreation needs are met on a regional basis by Wake County, with several county parks located within Raleigh: Historic Oak View Park, Historic Yates Mill Park, and North Wake Landfill District Park.

Table 9.1 City Parks

Name	Park Type	Acres
Biltmore Hills	Community	39.02
Alvis Farm	Community	95.92
Anderson Point	Community	89.57
Baileywick Road	Community	50.16
Barwell Road	Community	54.47
Brier Creek	Community	9.98
Carolina Pines	Community	38.71
Chavis	Community	28.87
Green Road	Community	26.60
Halifax	Community	4.73
Hodges Mill Creek	Community	49.16
Jaycee	Community	24.85
Lake Lynn	Community	51.99
Laurel Hills	Community	48.18
Leesville Road	Community	57.63
Leonard	Community	83.60
Lions	Community	41.41
Marsh Creek	Community	110.61

Milburnie Park	Community	88.17
Millbrook Exchange	Community	69.53
Optimist	Community	30.72
Sydnor M. White	Community	64.45
Thornton Road	Community	130.61
Watkins Road	Community	38.36
Worthdale	Community	36.14
Buffaloe Road	Metro	165.58
Dorothea Dix	Metro	306.83
Forest Ridge Access	Metro	2.52
Lake Johnson	Metro	165.06
Lake Wheeler	Metro	873.92
Pullen	Metro	66.38
Shelley Lake	Metro	144.80
Walnut Creek North	Metro	104.84
Walnut Creek South	Metro	204.71
Annie Louise Wilkerson, MD Nature Preserve Park	Nature Preserve	157.60
Durant Nature	Nature Preserve	241.58
Horseshoe Farm	Nature Preserve	146.26
Lake Johnson	Nature Preserve	305.29
Apollo Heights	Neighborhood	4.26
Brentwood	Neighborhood	19.16
Brookhaven	Neighborhood	25.92
Cedar Hills	Neighborhood	38.49
Chamberlain	Neighborhood	1.44
Charlotte H. Green	Neighborhood	1.02

Drewry Hills #2	Neighborhood	18.43
Eastgate	Neighborhood	25.27
Eliza Pool	Neighborhood	6.24
Erinsbrook Drive	Neighborhood	18.27
Forestville Road	Neighborhood	26.29
Fallon	Neighborhood	10.33
Fred Fletcher	Neighborhood	21.36
Glen Eden Drive	Neighborhood	20.41
Greystone Recreation Center	Neighborhood	.22
Highhill Road	Neighborhood	6.43
Hill Street	Neighborhood	16.54
Honeycutt Road	Neighborhood	29.99
Isabella Cannon	Neighborhood	3.53
John P. "Top" Green	Neighborhood	1.32
Kaplan Drive	Neighborhood	5.19
Kentwood	Neighborhood	14.63
Kingwood Forest	Neighborhood	4.18
Kiwanis	Neighborhood	24.14
Kyle Drive	Neighborhood	27.24
Longview	Neighborhood	6.91
Method	Neighborhood	8.32
North Hills	Neighborhood	31.92
Oakwood	Neighborhood	12.72
Peach Road	Neighborhood	6.96
Perry Creek	Neighborhood	26.46
Poole Road	Neighborhood	5.99
Powell	Neighborhood	8.64
Ridge	Neighborhood	6.78
Roanoke	Neighborhood	1.62

Roberts	Neighborhood	7.20
Sanderford	Neighborhood	23.48
Sierra Drive	Neighborhood	2.45
Southgate	Neighborhood	8.84
Spring Forest	Neighborhood	21.81
Strickland	Neighborhood	36.10
Sunnybrook	Neighborhood	20.57
Tarboro Road	Neighborhood	3.18
Williams	Neighborhood	8.74
Windemere Beaver Dam	Neighborhood	14.77
Wooten Meadow	Neighborhood	20.50
	Total Acres:	**4,903.07**

Source: City of Raleigh Parks and Recreation Department

9.3 Greenways

The Capital Area Greenway corridor system is a land use within the Comprehensive Plan. It is generally based on the drainage systems of the Neuse River and of the following creek systems: Crabtree, Walnut, Richland, and Harris. The City of Raleigh currently provides approximately 3,750 acres of greenway land through its community wide, Capital Area Greenway System. The City has a total of 34 separate greenway trails that span approximately 100 miles. The 2004 Raleigh Parks Plan goes into substantial detail regarding the Capital Area Greenway program, which is the oldest program in North Carolina and one of the oldest in the nation. More information is available at the following webpage:
http://www.raleighnc.gov/home/content/PRecDesignDevelop/Articles/CapitalAreaGreenwayTrailSystem.html

Although not part of the City's parks system, the 5,577-acre William B. Umstead State Park is a local and regional park resource that is managed by the North Carolina Division of Parks and Recreation. Residents from Triangle communities use the park for hiking, viewing wildlife, off-road biking, and other recreational pursuits. Greenway trail access from Raleigh to Umstead Park also connects with the Town of Cary's greenway system and Lake Crabtree County Park. This park includes a 500 acre lake and 215 upland acres with an extensive trail system.

9.4 Future Park and Open Space Needs

Table 9.2 City-Wide Current and Proposed Level of Service (LOS) Goals and Needs based on the 2004 Park Plan

Classification	Existing Acres	Existing Number of Parks	LOS Standard (Acres per 1000 people)	Additional Acres Needed by 2030	Projected Park Size	New Parks Needed to Meet 2030 LOS	Total Parks Needed by 2030
Neighborhood Parks	628	50[1]	2.6	848[2]	15 acres	57	107
Community Parks	1,299	24	3.11	494	60 acres	9	33
Metro Parks	1,730[3]	8	4.23	0	300 acres	0	8
Nature Preserves	851	4	N/A	N/A	N/A	N/A	4
Special Parks	1,050	135	N/A	N/A	N/A	N/A	135
Greenway Corridors	3,762	N/A	N/A	1,656	N/A	N/A	N/A
Total	**9,320**	**221**		**2,998**		**66**	**287**

[1] Includes five school parks that are recognized as currently serving community needs as Neighborhood Parks

[2] Presumes six acres equivalent for each of five school parks currently functioning as Neighborhood Parks

[3] Nature Preserve acreage is added to the Metro Parks acreage when calculating LOS for Metro Parks

Source: City of Raleigh Parks and Recreation Department

Chapter 10: Community Facilities

A community facility is established primarily for the benefit and service of the population of the community in which it is located. Uses include but are not limited to schools, community centers, libraries, police protection, fire stations, or government buildings.

The tables captured below represent data collected through comprehensive planning efforts that occurred during the past calendar year.

Table 10.1 Police Facilities

Police Facility	Number of Staff	Number of Vehicles	Facility Sq. Ft.	Address
Headquarters and North	193	143	45,900	6716 Six Forks Road, 27615
Downtown	118	59	33,700	218 W. Cabarrus Street, 27602
Front Street	103	133	48,000	1221 Front Street, 27609
Southeast	94	76	10,594	1601-30 Cross Link Road, 27610
Southwest	77	54	14,400	601-104 Hutton Street, 27606
Atlantic Avenue	104	161	16,165	4501 Atlantic Avenue, 27604
Northeast	68	54	11,100	8320-120 Litchford Road, 27615
Northwest	61	46	11,000	8016 Glenwood Avenue, 27612
The Academy	8	10 (this includes the 2 vans and 1 bus)	12,416	4205 Spring Forest Road, 27616
The Range	10	21	9,260	8401 Battle Bridge Road **(Total of all buildings)**
The Range			7,000	Range Road (New Building)
The Range			1,280	2 old trailers (Used as office space)
The Range			260	Old cinder block range house
The Range			400	(4) storage sheds on property
The Range			320	Range 2-story garage
Total:	**836**	**757**	**212,535**	

Source: City of Raleigh Police Department

Table 10.2 Fire Services

Performance Measures	Actual FY 2010	Actual FY 2011	Actual FY 2012	Estimate FY 2013	Projection FY 2014
Fire calls answered	1,167	1,489	1,354	1,077	1,171
Rescue and EMS calls answered	22,278	22,790	21,912	21,951	21,768
Fires investigated	204	277	326	258	319
Permits issued	1,595	1,547	844	1,272	897
Average hours per fire call (hrs)	.80	.94	1.01	0.92	1.02
Average hours per EMS call (hrs)	.26	.33	.33	0.33	0.37
Average response time to emergency calls (min)	4.38	4.45	4.45	4.43	4.47
Percent citizens reached by public fire education	5%	8%	9%	10%	12%

Source: City of Raleigh Fire Department

Table 10.3 Waste Management Service Program

The City of Raleigh Solid Waste Services Department collects waste, recyclables and yard waste. Collections take place within city limits, as captured here:

Residential Waste Collection	Commercial Waste Collection	Recyclables Collection	Yard Waste Collection	Bulky Waste Collection	Other
Weekly, Curbside	Open Market	Weekly, Curbside[1]	Weekly, Curbside[2]	Curbside, By Appointment[3]	7 Drop off locations[4]

[1] Phasing in biweekly collection, using roll carts.
[2] Leaves are picked up seasonally. Drop off Yard Waste option (fee-based).
[3] No fee for items 4 cubic yards or less, up to 4 appointments a year. Fee for additional bulky items.
[4] Recyclables accepted including small business operations.

Source: City of Raleigh Solid Waste Services Department

Table 10.4 Solid Waste Services Equipment

Number	Type
107	Large vehicles
50	Automated refuse collectors
40	Rear loader garbage and yard waste collectors
13	Recycling trucks (compartmentalized for separation)
2	Rollout trucks (for recycling drop offs)
2	Knuckle Boom trucks (for bulky item and appliance pickup)

Source: City of Raleigh Solid Waste Services Department

Table 10.5 Solid Waste Collections in Tons

	FY08	FY09	FY10	FY11	FY12
Garbage	85,139	87,054	87,562	85,217	85,864
Recycling	18,740	19,325	20,104	22.370	23,888
Yard Waste	11,759	19,691	17,271	17,262	17,161

Source: City of Raleigh Solid Waste Services Department

Chapter 11: Historic Resources

The City of Raleigh has a unique heritage. It was created in 1792 as the planned site for the capital city of North Carolina. Through more than two centuries of growth, Raleigh's capital city status has shaped its evolution. As a seat of biennial legislative government, growth was slow during the city's first one hundred fifty years. Raleigh's only business for decades was state government and the services needed to support it. Raleigh came late to industrial development, and then only on a small scale. Having escaped destruction during the closing days of the Civil War, the city still enjoys the visual aspect of its original plan, parks, and built environment.

11.1 The City's Historic Preservation Program

The Raleigh City Council has supported historic preservation activities in the city through an appointed citizen committee since 1961—five years before the passage of the National Historic Preservation Act. The Raleigh Historic Development Commission (RHDC) is the successor organization to that committee. The RHDC assists in the planning and implementation of appropriate changes to Raleigh Historic Landmarks and local historic district properties through the Certificates of Appropriateness (COA) process. In 2012, preservation planning staff and the RHDC processed 149 COAs.

Raleigh currently has a total of 150 Local Historic Landmarks, 28 National Register Districts, 6 Historic Overlay Districts, and 3 National Historic Landmarks. On May 1, 2012, the city added its first local Historic Overlay District in over twenty years. The Prince Hall Historic District is an urban residential area that has been part of an African-American neighborhood since at least Reconstruction. This Historic District is situated several blocks southeast of the State Capitol building near the Shaw University area.