City of Raleigh Data Book 2015

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, "Data Book Updates", states that data in the report will be updated every year.

The Raleigh Data Book is published online in conjunction with population estimates conducted by city staff that occurs in January 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 2015 Raleigh Data Book updates and/or accompanies the following Community Inventory Report chapters and correlated to 2015 Data Book chapters.

List of Figures and Tables (next page) provides links to data within the 2015 Raleigh Data Book.

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Chapter 2: Demographics and Household Trends

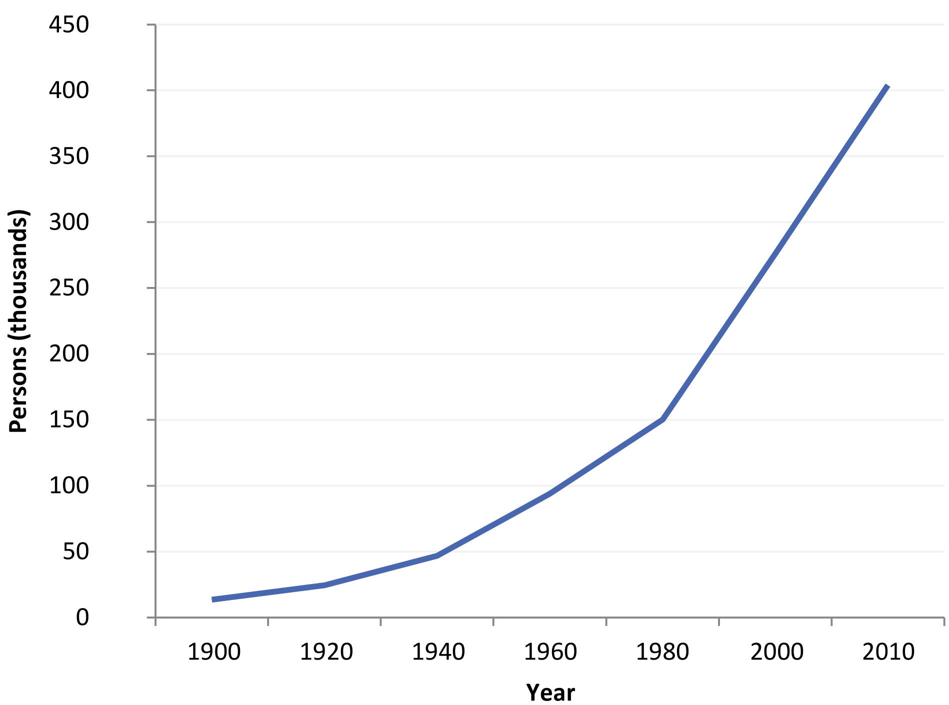
With a population increase of 59% from 2000 to 2014, Raleigh is one of the fastest-growing cities in the country. This chapter provides the most up-to-date data available for understanding the characteristics of the individuals and households that make up the population of Raleigh.

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

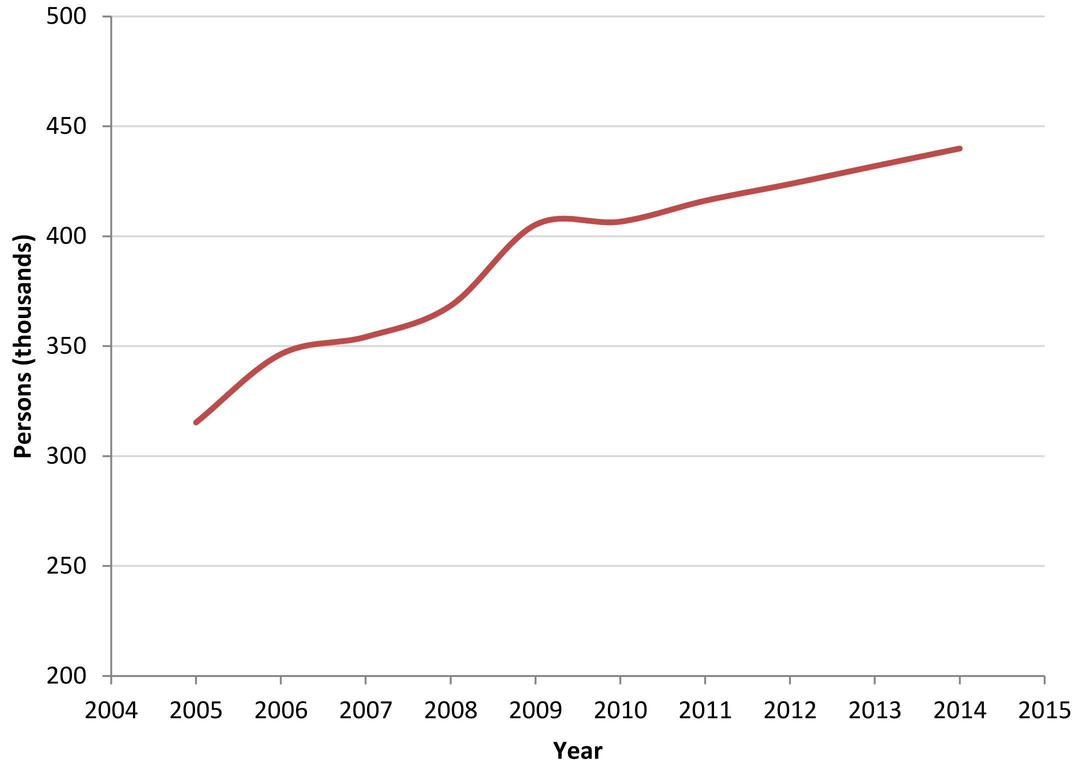
The most recent Census population estimates reflect Raleigh's continued growth (see Figures 2.1 and 2.2). In 2014, Raleigh was estimated to have a population of 439,896 – a 1.9% increase from the previous year (see Table 2.1). The number of housing units has also grown, with an estimate of 192,504 units in 2014 representing an increase of 4.1% from 2013 (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 Count



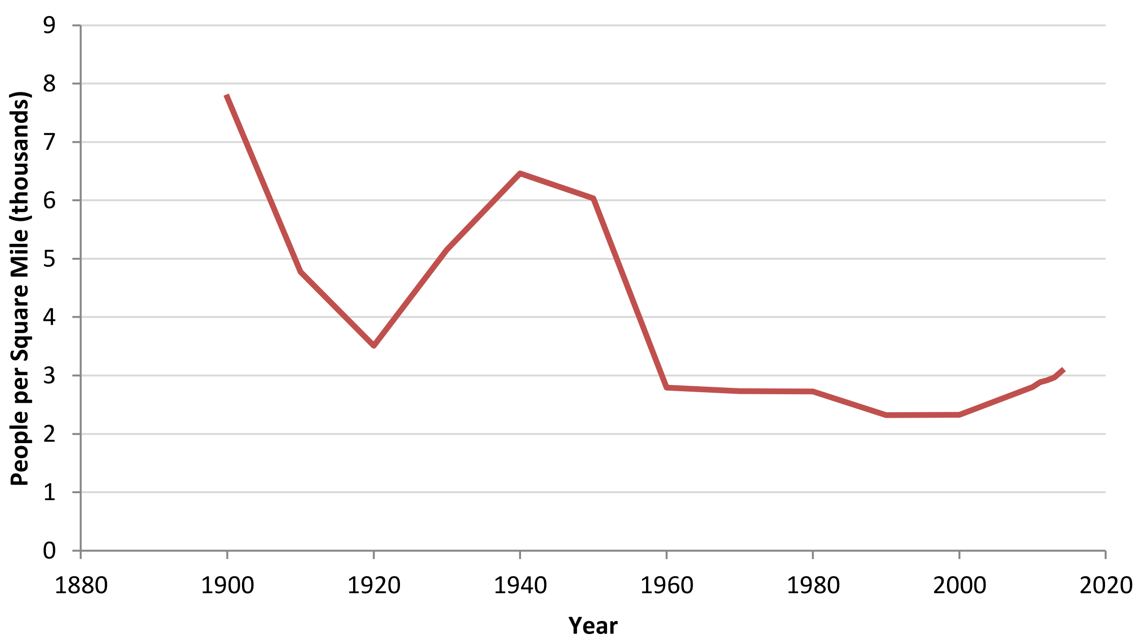
Source: U.S. Census Bureau, Decennial Data

Figure 2.2 Census Population Count and Estimates



Sources: U.S. Census Bureau, Decennial Data (1990, 2000, 2010), Population Estimates Program (July, 1991-2014)

Figure 2.3 Population Density



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

Table 2.1 Population, Growth Rate, and Density

Year	Population	Annual Percent Growth Rate	Land Area in Miles²	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
2013	431,746	2.0%	145.38	2,970
2014	439,896	1.9%	146.30	3,007

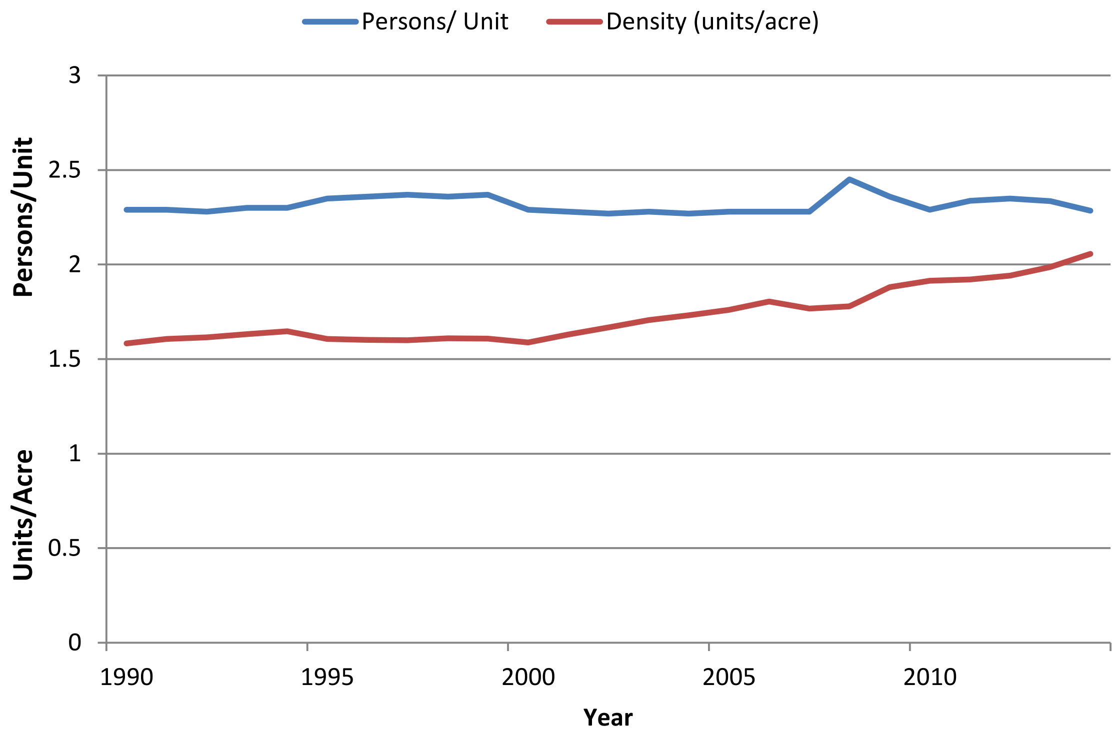
Source: U.S. Census Bureau, Decennial Data & Population Estimates; Land Area by Raleigh Dept. of City Planning

Table 2.2 Housing Units, Growth Rate, and Unit Density

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
2000	120,699	2.1%	75,974	1.59
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
2013	184,844	2.6%	93,047	1.99
2014	192,504	4.1%	93,632	2.06

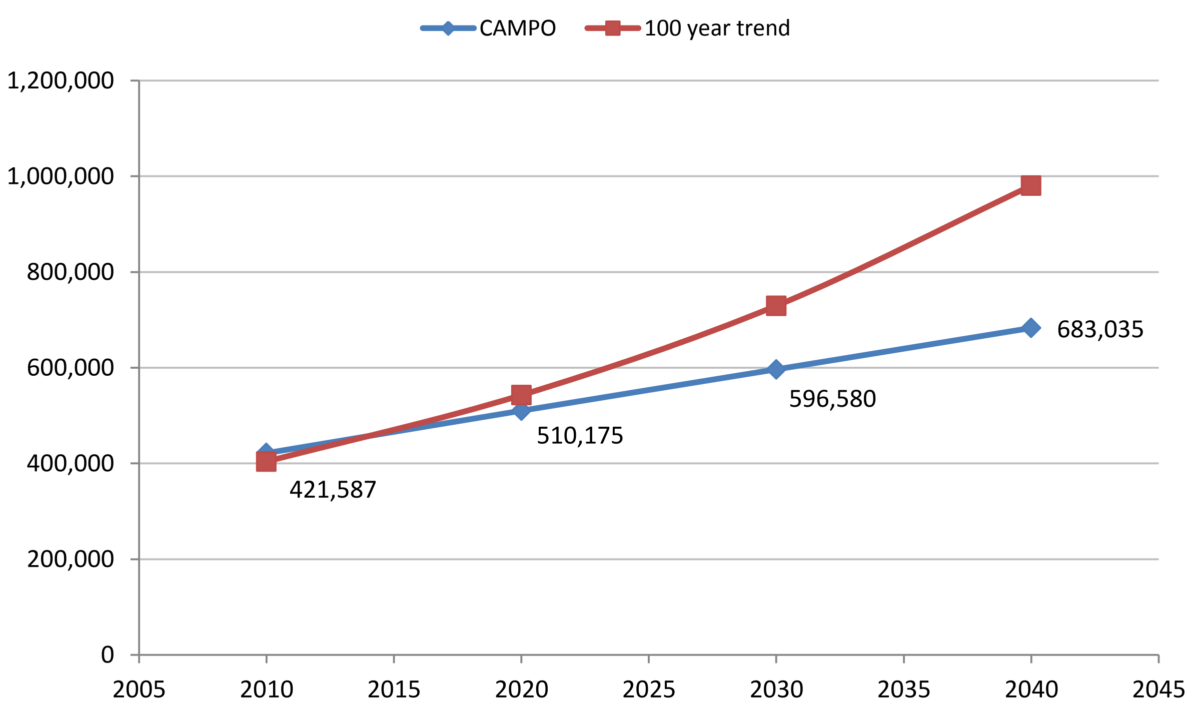
Source: U.S. Census Bureau, Decennial Data; Non-Decennial Year Housing Unit Estimates and Land Area by Raleigh Department of City Planning

Figure 2.4 Dwelling Unit Densities, 1990 – 2014



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

Figure 2.5 Raleigh Population Projections



Source: Capital Area Metropolitan Planning Organization (CAMPO); Raleigh Department of City Planning

2.2 Residential Development

Single family detached dwelling units comprise 45% of housing in Raleigh based on 2014 American Community Survey data (see Table 2.3). Multi-family apartments come in second at 37%, followed by townhouses (13%), duplexes (2%), and mobile homes (2%) (see Figure 2.6). From 2010 to 2015, apartments made up 62% of all issued residential building permits. In 2015, apartments comprised the largest share – 62% - of residential building permits issued in Raleigh (see Figure 2.8 and Table 2.7). Single family homes came in second at 22%.

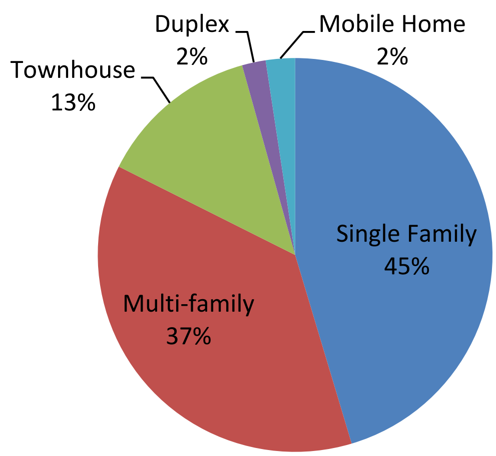
Raleigh's housing stock is relatively young, with approximately 80% of its housing units built in the last 45 years (see Table 2.4). The overall household vacancy rate (homeowners and renters) is 9.9%, which is down from a high of 11.3% in 2010. The homeownership rate stands at 49%, a decrease from 53.5% in 2010 (see Table 2.5 and Figure 2.7).

Table 2.3 Total Housing Units by Number in Structure, 2014

Units in Structure	Number	Percent
1-unit, detached	87,311	45.4%
1-unit, attached	25,512	13.3%
2 units	3,735	1.9%
3 or 4 units	9,102	4.7%
5 to 9 units	14,873	7.7%
10 to 19 units	24,995	13.0%
20 or more units	22,291	11.6%
Mobile home	4,603	2.4%
Total units	192,504	100%

Source: U.S. Census Bureau, 2014 American Community Survey, 1-year Estimate

Figure 2.6 Housing Share by Building Type, 2014



Source: U.S. Census Bureau, 2014 American Community Survey, 1-year Estimate

Table 2.4 Housing Units by Year Built, 2014

Year Built	Number	Percent
1939 or earlier	5,901	3.1%
1940 to 1949	3,149	1.6%
1950 to 1959	12,473	6.5%
1960 to 1969	17,239	9.0%
1970 to 1979	20,037	10.4%
1980 to 1989	34,806	18.1%
1990 to 1999	40,937	21.3%
2000 to 2009	52,003	27.0%
2010 or later	5,959	3.1%
Total	192,504	100.0%

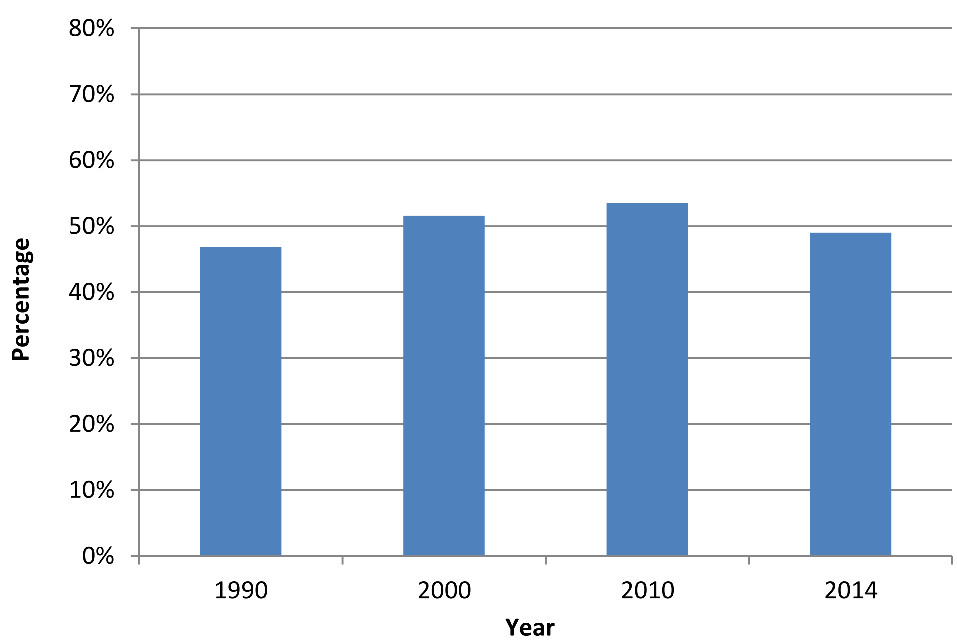
Source: U.S. Census Bureau, 2014 American Community Survey, 1-year Estimate

Table 2.5 Occupancy Status, 2014

Total housing units	192,504
Occupied housing units	173,456
Vacant housing units	19,048
Overall vacancy rate	9.9%
Homeowner vacancy rate	2.7%
Rental vacancy rate	6.3%

Source: U.S. Census Bureau, 2014 American Community Survey, 1-year Estimate

Figure 2.7 Homeownership Rate



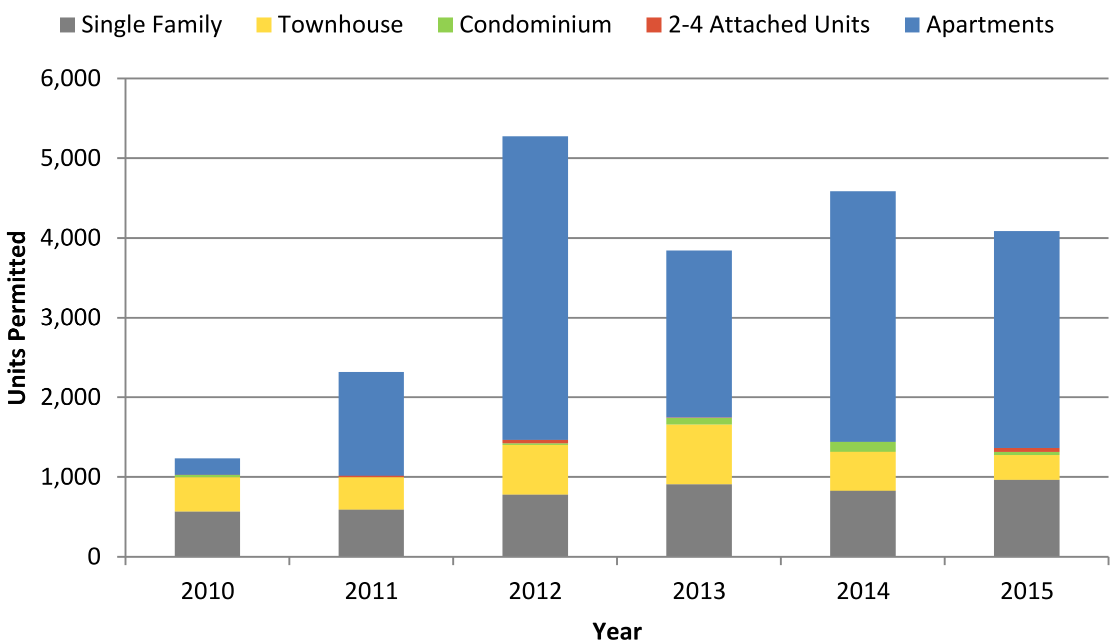
Source: U.S. Census Bureau, Decennial Data (1990, 2000, 2010); 2014 American Community Survey, 1-year Estimates

Table 2.6 Housing Tenure for Occupied Units

	2000		2010		2014	
	Number	Percent	Number	Percent	Number	Percent
Owner-occupied	58,079	51.6%	87,284	53.5%	85,116	49.1%
Renter-occupied	54,529	48.4%	75,715	46.5%	88,340	50.9%
Total occupied units	112,608	100.0%	162,573	100.0%	173,456	100.0%

Source: U.S. Census Bureau, Decennial Data (2000, 2010); 2014 American Community Survey, 1-year Estimates

Figure 2.8 Residential Units Permitted



Source: City of Raleigh Development Services Department and Department of City Planning
**Refer to Table 5.8 for information on square feet and construction value of residential building activity*

Table 2.7 Residential Units Permitted[a]

Year	Single Family	Townhouse	Condominium	2-4 Attached Units	Apartments	Totals
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
2013	909	750	80	8	2,096	3,843
2014	829	491	125	-	3,140	4,585
2015	965	308	42	49	2,723	4,087
6-year total	4,648	2,999	326	122	13,269	21,364
Percent of Total	22%	14%	2%	1%	62%	100%
6-year average	930	600	65	24	2,654	4,273

Source: City of Raleigh Development Services Department and Department of City Planning
This includes all units from the specified calendar year that have been permitted; it does not indicate construction.

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 2.9). Raleigh's age distribution has changed somewhat from 2000 to 2014 with the percentage of 20 to 44 year-olds declining as a share of the overall population. In contrast, the percentage of 45 to 84 year-olds has seen small but significant gains (see Figure 2.10).

In terms of population by race, both the share of white and African-American populations have decreased from 2000 to 2014 (see Table 2.8). The Asian population has grown from 3.4% in 2000 to an estimated 3.7% in 2014. The Hispanic/Latino population grew by 172% from 2000 to 2014, increasing its share of the total population from 7% to 12% (see Table 2.9).

In terms of educational attainment, Raleigh has a higher percentage of residents with a high school degree or higher (92%) and residents with a bachelor's degree or higher (48%) than the state of North Carolina and the nation (see Table 2.11). Approximately 1 in 6 people in Raleigh (17%) holds a graduate or professional degree, which is 70% higher than the statewide average.

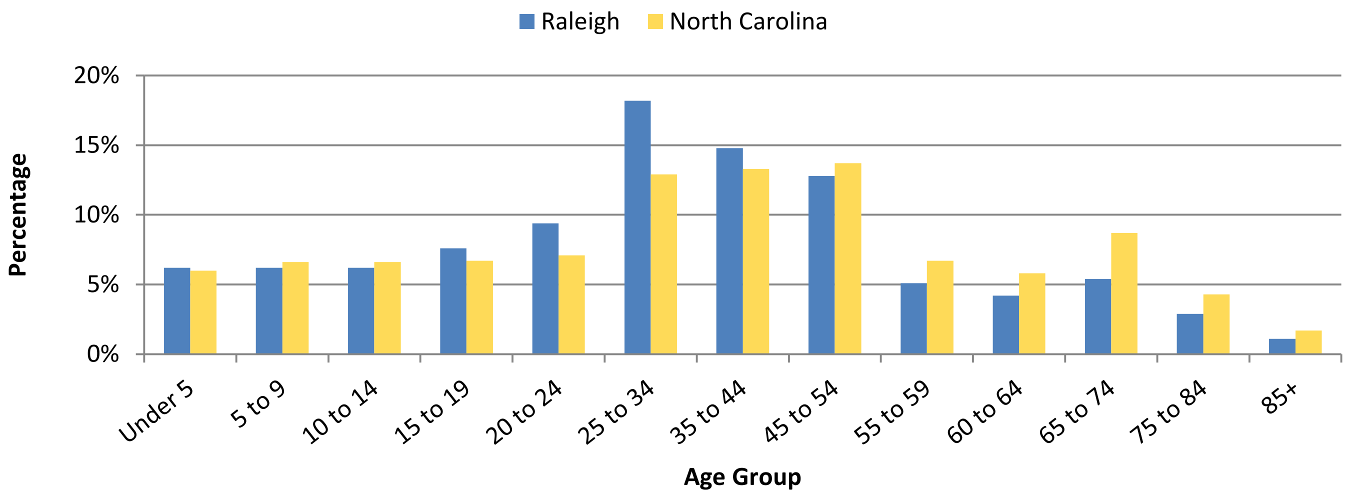
After peaking in 2010, the percentage of people and families living below the poverty level has dropped significantly (see Table 2.12). In 2010, the percentage of people in poverty peaked at an estimated 18.4% before falling to 16.6% in 2014. For families, the percentage decreased from 13.9% in poverty in 2010 to 12.5% in 2014.

Adjusting for inflation, median household incomes and per capita incomes peaked in 2000, declined during the economic downturn around 2010, and have stayed relatively steady for the past five years. In 2014, the median household income was $53,475 and the per capita income was $32,476 (see Table 2.12).

The share of different types of households has also changed slightly during the last two decades (see Table 2.13 and Figure 2.11). Single parent households have increased the most (up approximately 3%), with other family households coming in second (up approximately 2%). Married couple households with children have decreased slightly (approximately 1%). Persons per household – as measured by the population in households divided by the total number of households – has trended upward from 2000 to 2014 (see Table 2.13).

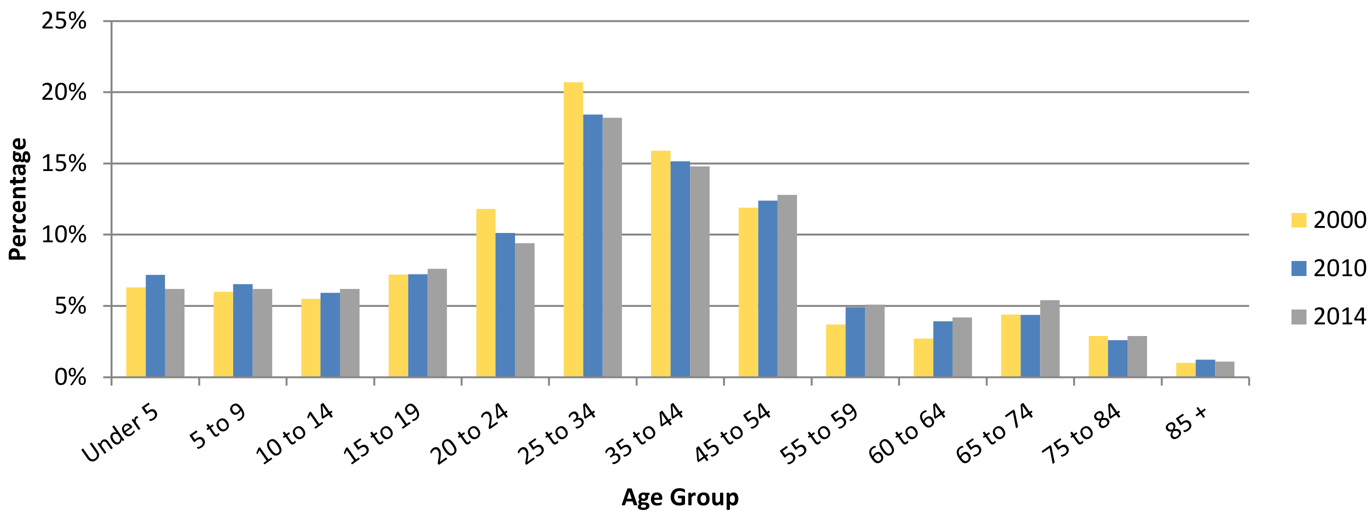
Commuting modes in Raleigh have remained steady over the past five years with a large majority of people driving to work alone in a personal vehicle (79.3% in 2014) and approximately half of the remainder carpooling to work (9.2%) (see Table 2.14). The rest either take public transit (2.0%), walk (1.7%), work at home (6.2%) or use other means (1.6%). Raleigh's rate of driving remains much higher than other comparable U.S. cities (see Figure 2.12).

Figure 2.9 Population Distribution by Age Group in Raleigh and North Carolina, 2014



Source: U.S. Census Bureau, 2014 American Community Survey, 1-year Estimates

Figure 2.10 Age Distribution



Source: U.S. Census Bureau Decennial Data (2000, 2010); 2014 American Community Survey, 1-year Estimates

Table 2.8 Population by Race

	2000		2010		2014	
	Number	%	Number	%	Number	%
White	174,786	63.3	225,705	59.0	269,502	61.3%
Black or African American	76,756	27.8	111,948	29.5	119,672	27.2%
American Indian & Alaska Native	981	0.4	1,114	0.3	2,095	0.5%
Asian or Pacific Islander	9,445	3.4	16,935	4.4	16,200	3.7%
Some other race	14,125	5.1	20,371	5.3	20,991	4.8%

Source: U.S. Census Bureau Decennial Data (2000, 2010); 2014 American Community Survey, 1-year Estimates

Table 2.9 Growth in Hispanic Population

	Number	Percent of Total Population
2000 Hispanic/Latino Population	19,308	7.0%
2014 Hispanic/Latino Population	52,616	12.0%
Percent Increase	172.5%	

Source: U.S. Census Bureau Decennial Data (2000); 2014 American Community Survey, 1-year Estimate

Table 2.10 Components of Hispanic Population, 2014

	Number	Percent	Percent of Hispanic
Mexican	30,222	6.9%	57.4%
Puerto Rican	5,825	1.3%	11.1%
Cuban	855	0.2%	1.6%
Other Hispanic or Latino	15,714	3.6%	29.9%
Hispanic or Latino (of any race)	52,616	12.0%	100.0%

Source: U.S. Census Bureau Data; 2014 American Community Survey, 1-year Estimate

Table 2.11 Educational Attainment

	2000			2014		
	High School Grad or higher	Bachelor's Degree or higher	Graduate/ Professional Degree	High School Grad or higher	Bachelor's Degree or higher	Graduate/ Professional Degree
Raleigh	89%	45%	14%	92%	48%	17%
North Carolina	78%	23%	7%	87%	29%	10%
United States	79%	24%	9%	87%	30%	11%

Source: U.S. Census Bureau Decennial Data (2000); 2014 American Community Survey, 1-year Estimates

Table 2.12 Poverty, Income, and Employment Indicators

	1990	2000	2010	2014
Percent of persons below poverty	11.8%	11.5%	18.4%	16.6%
Percent of families below poverty	9.0%	7.1%	13.9%	12.5%
Median Household Income (2014 $)	$58,778	$64,080	$54,208	$53,475
Per Capita Income (2014 $)	$30,603	$35,685	$30,436	$32,476
Unemployment Rate	4.0%	3.8%	7.5%	5.6%
Labor Force Participation Rate	66.4%	72.7%	69.9%	72%

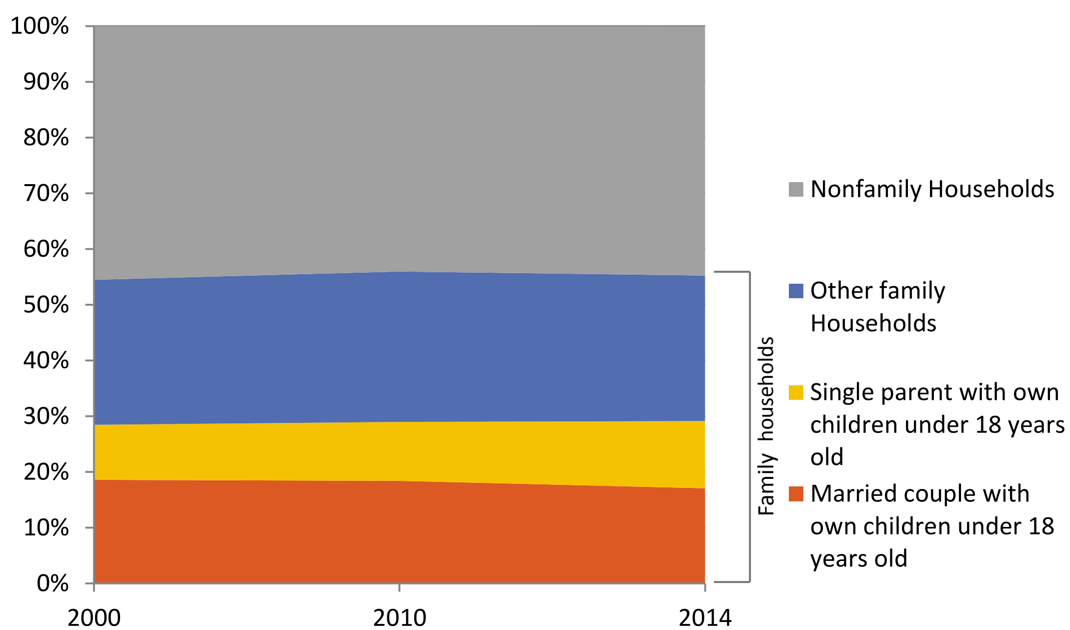
Source: U.S. Census Bureau, Decennial Censuses (1990, 2000); 2010, 2014 American Community Survey 1-yr Est.

Table 2.13 Household Trends

	Number			Percent		
	2000	2010	2014	2000	2010	2014
Family Households	61,327	91,186	96,001	54.5%	55.9%	55.3%
Married couple with own children under 18 years old	20,194	29,973	30,263	18.6%	18.4%	17.4%
Single parent with own children under 18 years old	11,122	17,245	23,565	9.9%	10.6%	13.6%
Other family households	29,291	41,077	42,173	26.0%	27.0%	24.3%
Nonfamily Households	51,281	71,813	77,455	45.5%	44.1%	44.7%
Total Households	**112,608**	**162,999**	**173,456**	**100.0%**	**100.0%**	**100.0%**
Persons per Household	**2.30**	**2.36**	**2.42**			

Source: U.S. Census Bureau Decennial Data (2000, 2010); 2014 American Community Survey 1-year Estimates

Figure 2.11 Household Share by Type



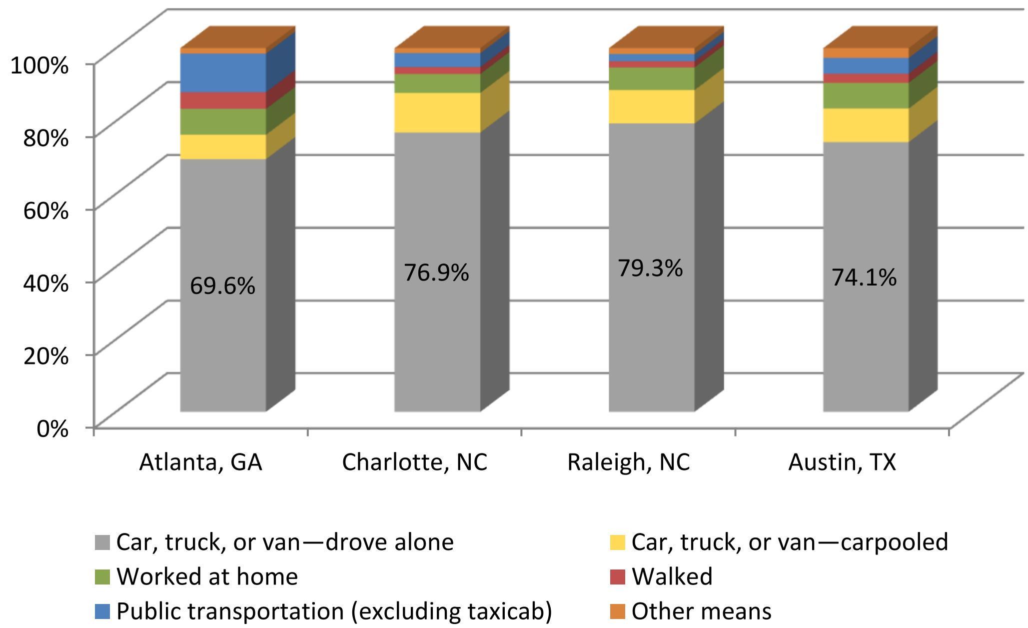
Source: U.S. Census Bureau Decennial Data (2000, 2010); 2014 American Community Survey, 1-year Estimates

Table 2.14 Journey to Work, 2014

	Number	Percent
Car, truck, or van—drove alone	186,648	79.3%
Car, truck, or van—carpooled	21,558	9.2%
Worked at home	14,608	6.2%
Walked	3,988	1.7%
Public transportation (excluding taxicab)	4,620	2.0%
Other means	5,203	1.6%

Source: U.S. Census Bureau, 2014 American Community Survey, 1-year Estimates

Figure 2.12 Journey to Work – Comparison with Similar Cities, 2014



Source: U.S. Census Bureau, 2014 American Community Survey, 1-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 Unified Development Ordinance is law. This code provides the regulatory framework for particular land uses and how the uses interact with each other. It addresses 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. Adopted in 2013, the Unified Development Ordinance (UDO) encourages mixed-use and pedestrian-friendly development. In order to fully implement the UDO, the city engaged in a multi-year remapping process whereby commercial and high-density residential districts were rezoned from the old code's legacy districts to new UDO zoning districts. The vast majority of those properties were rezoned in November 2015 with an effective date February 14, 2016. There are 65 parcels totaling approximately 490 acres still subject to legacy zoning districts. Located throughout the city, these parcels are currently being reviewed by City Council and are expected to be rezoned to Unified Development Ordinance zoning districts during 2015.

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/cp

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

3.1 Land Use and Zoning Allocation

Zones that primarily accommodate residential uses make up 64% of total land area in Raleigh's planning jurisdiction and those that primarily accommodate commercial uses – the mixed-use zones - make up 25% of total land area (see Table 3.1 and 3.2). Breaking those shares down further, mixed-use zones that primarily accommodate retail (NX-, CX-, and DX-) comprise 5.8% of total land area, those that are considered industrial are 8.4% (IX-), and those that primarily accommodate office uses (OX- and OP-) make up 7.3%. In addition to the residential and mixed-use zones, there are also six special districts, which are meant for land conservation, specialized uses (heavy industry), and flexible uses (campus and planned developments). These special districts account for approximately 11% of Raleigh's total land area (see Table 3.3). Overlay zoning districts (historic overlay districts, special highway overlay districts, etc.) cover 29.5% of total land area (see Table 3.4).

Table 3.1 Residential Zoning Allocation

Zoning District	Acres	Percent of Total Land Area
R-1: Residential-1	4,931	4.2%
R-2: Residential-2	2,030	1.7%
R-4: Residential-4	40,338	34.7%
R-6: Residential-6	17,241	14.8%
R-10: Residential-10	9,456	8.1%
Total Residential	**73,996**	**63.7%**

Table 3.2 Mixed-Use Zoning Allocation

Zoning District	Acres	Percent of Total Land Area
RX-: Residential Mixed Use	3,775	3.3%
OP-: Office Park	530	0.5%
OX-: Office Mixed Use	7,871	6.8%
NX-: Neighborhood Mixed Use	745	0.6%
CX-: Commercial Mixed Use	5,470	4.7%
DX-: Downtown Mixed Use	579	0.5%
IX-: Industrial Mixed Use	9,698	8.4%
Total All Mixed-Use Zones	**28,667**	**24.7%**

Source: City of Raleigh Department of City Planning, 2015

Table 3.3 Special Districts Zoning Allocation

Zoning District	Acres	Percent of Total Land Area
CM: Conservation Management	2,072	1.8%
AP: Agricultural Productive	1,966	1.7%
IH: Heavy Industrial	3,271	2.8%
MH: Manufactured Housing	820	0.7%
CMP: Campus	0	0.0%
PD: Planned Development	4,843	4.2%
Total All Special District Zones	**12,971**	**11.2%**

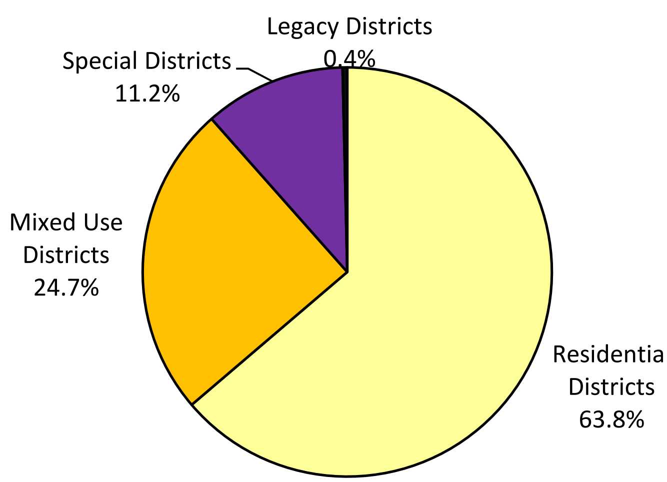
Source: City of Raleigh Department of City Planning, 2015

Table 3.4 Overlay Zoning District Allocation

Zoning District	Acres	Percent of Land Area
AOD – Airport Overlay District	2,170	1.9%
HOD – Historic Overlay District	316	0.3%
MPOD – Metro-Park Protection Overlay District	1,451	1.2%
NCOD – Neighborhood Conservation Overlay District	2,822	2.4%
SHOD-1 – Special Highway Overlay District 1	8,028	6.9%
SHOD-2 – Special Highway Overlay District 2	5,100	4.4%
SRPOD –Special Residential Parking Overlay District	8,231	7.1%
TOD – Transit Oriented Development Overlay District	0	0%
WPOD – Watershed Protection Area Overlay District	9,570	8.2%
Total Overlay Districts (not accounting for overlap)	**37,695**	**32.5%**
Total Overlay Districts (accounting for overlap)	**34,253**	**29.5%**

Source: City of Raleigh Department of City Planning, 2015

Figure 3.1 Generalized Zoning Allocation



Source: City of Raleigh Department of City Planning, 2015

A property's zoning district controls for the range of uses that are allowable on the property. The table below shows the actual uses that properties in Raleigh exhibit. As can be seen in Table 3.5, parcels that account for 44.3% of total acreage in Raleigh have Residential as their primary use, and in particular Single-Unit Living is the predominant use in this category (34.4%). Other significant uses include Public and Institutional (18.2%), Commercial (10.6%), and Industrial (5.6%). Properties that account for approximately 20% of Raleigh's land area are considered vacant, meaning that there is no discernible use of the property.

Table 3.5 Land Use Allocation

Land Use Category	Parcels	Acreage	Percentage of Area
Residential	**117,517**	**44,349.9**	**44.3%**
Household Living: Single-unit Living	88,960	34,408.7	34.4%
Household Living: Townhouse Living	24,527	1,488.6	1.5%
Household Living: Two-unit Living	1,922	714.8	0.7%
Household Living: Manufactured	24	429.4	0.4%
Household Living: Multi-unit Living	1,979	6,464.6	6.5%
Group Living	71	213.1	0.2%
Social Service	34	630.7	0.6%
Public and Institutional	**3,690**	**18,238.7**	**18.2%**
Civic	476	5,264.3	5.3%
Parks, Open Space, and Greenways	3,134	12,538.9	12.5%
Utilities	80	435.6	0.4%
Commercial	**3,509**	**10,662.3**	**10.6%**
Day Care	93	157.0	0.2%
Indoor Recreation	100	441.8	0.4%
Medical	135	365.4	0.4%
Office	1,240	3,779.0	3.8%
Outdoor Recreation	114	2,033.4	2.0%
Overnight Lodging	80	210.7	0.2%
Parking	313	343.3	0.3%
Passenger Terminal	10	15.1	0.0%
Personal Service	158	145.1	0.1%
Restaurant/Bar	348	310.1	0.3%
Retail Sales	762	2,371.4	2.4%
Vehicle Sales/Rental	156	489.9	0.5%
Industrial	**1,421**	**5,637.7**	**5.6%**
Heavy Industrial	133	1,800.4	1.8%
Light Industrial	296	690.2	0.7%
Light Manufacturing	68	146.7	0.1%
Research & Development	10	106.5	0.1%
Self-Service Storage	59	265.9	0.3%
Vehicle Service	333	365.8	0.4%
Warehouse & Distribution	294	1,230.2	1.2%
Waste-Related Service	6	424.0	0.4%
Wholesale Trade	222	607.9	0.6%

Open	**18**	**1,473.9**	**1.5%**
Agriculture	14	1,084.4	1.1%
Resource Extraction	4	389.5	0.4%
Mixed Use	**115**	**123.6**	**0.1%**
Vacant	**8,990**	**19,655.9**	**19.6%**
Grand Total	**135,260**	**100,142.0**	**100.0%**

Source: City of Raleigh Department of City Planning, 2015

3.2 Land Capacity, Annexation, and Growth Potential

The latest land capacity estimates completed in 2014 show low-to-medium density residential districts as those with the largest amount of undeveloped land (10,128 acres), followed by commercial districts that permit residential (2,543 acres) and then commercial districts that do not allow residential (1,729 acres) (see Table 3.4). The low-to-medium density districts are able to accommodate the most dwelling units (35,020), but commercial districts that allow residential can also house a large number (33,477). In terms of non-residential space, the City is estimated to be able to accommodate approximately 45 million square feet. This multi-week analysis was done in 2014 prior to the implementation of the new Unified Development Ordinance (UDO); future estimates will reflect the new recently-implemented UDO districts.

In 2015, the city added 343 acres through annexation (see Table 3.5). Changes in state laws restricting city-initiated annexations have resulted in petition-only annexations, usually of smaller parcels by individual owners. The total future annexation potential for Raleigh is 41,065 acres (see Table 3.6). This includes both ETJ areas and Urban Services Areas (USA). Combined with the city's current acreage of 93,642, the total potential city limits acreage is 134,706 acres.

Table 3.6 Land Capacity Estimates by Aggregated Zoning Types

Aggregated Zone	Total Acres of Undeveloped Land	Projected Square Feet Non-Residential	Projected Dwelling Units
Conservation	410	0	0
Agricultural	455	0	227
Manufactured Housing	212	0	1,249
Low-to-Medium Density Residential	10,128	0	35,020
High Density Residential	413	0	6439
Commercial, allows residential	2,543	22,784,917	33,477
Commercial, no residential	1,729	22,635,140	0
Totals	**16,671***	**52,327,256**	**85,851**

(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, 2014

Table 3.7 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	129
2013	93,047	208
2014	93,309	262
2015	93,652	343

Source: City of Raleigh Department of City Planning, 2015

Table 3.8 Future Raleigh City Limits Growth Potential

Geography	Acres
Current City Limits	93,652
Potential ETJ Growth Area	22,404
Potential USA Growth Area	18,649
Total Future Annexation Potential	**41,054**
Total Potential City Limits	**134,706**

Source: City of Raleigh Department of City Planning, 2015

Chapter 4: Economic Development & Employment Trends

One of the nation's most rapidly growing regions, the Research Triangle is benefiting from its long-term investment in 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 depths of the recession that occurred around 2010. 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

Overall, jobs in the service-providing sector account for a larger share of Wake County's employment than in the goods-producing sector. Currently 9-in-10 jobs are service-providing versus only 1-in-10 in goods-producing industries. However, in the last 5 years goods-producing jobs – such as those in agriculture, construction, and manufacturing – have grown at a 2.9% annual rate versus 2.6% for service-providing industries (see Tables 4.1 and 4.2). Despite that growth, the top three industries in 2014 continue to be in the service-providing industry: Professional and Business Services; Education and Health Services, and; Trade, Transportation, & Utilities. The Professional and Business Services industry saw the largest annual percent change in employment (+4.9%) from 2010-2014, but other industries also saw large gains including Leisure and Hospitality (+3.9%) and Manufacturing (+3.4%).

Using the latest data from the 2010-2014 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 both professional, scientific, management, and administrative and information jobs.

Table 4.1 Wake County Average Annual Employment by Industry (condensed)

	2010	Percent of Total	2014	Percent of Total	Annual Change 2010 to 2014
Goods-Producing	**44,226**	**10.2%**	**50,919**	**10.4%**	**2.9%**
Natural Resources and Mining	1,032	0.2%	1,089	0.2%	1.1%
Agriculture Forestry Fishing & Hunting	770	0.2%	858	0.2%	2.2%
Mining	263	0.1%	231	0.0%	-2.6%
Construction	24,078	5.6%	27,223	5.6%	2.5%
Manufacturing	19,116	4.4%	22,607	4.6%	3.4%
Service-Providing	**387,348**	**89.8%**	**439,543**	**89.6%**	**2.6%**
Trade, Transportation & Utilities	80,011	18.5%	89,439	18.2%	2.3%
Utilities	1,394	0.3%	2,327	0.5%	10.8%
Wholesale Trade	18,192	4.2%	21,009	4.3%	2.9%
Retail Trade	49,775	11.5%	56,105	11.4%	2.4%
Transportation & Warehousing	10,652	2.5%	9,998	2.0%	-1.3%
Information	16,333	3.8%	18,433	3.8%	2.4%
Financial Activities	25,666	5.9%	25,513	5.2%	-0.1%
Finance & Insurance	17,971	4.2%	17,373	3.5%	-0.7%
Real Estate and Rental and Leasing	7,695	1.8%	8,140	1.7%	1.1%
Professional & Business Services	81,028	18.8%	102,826	21.0%	4.9%
Professional and Technical Services	37,086	8.6%	47,185	9.6%	4.9%
Management of Companies & Enterprises	9,613	2.2%	10,277	2.1%	1.3%
Administrative and Waste Services	34,329	8.0%	45,364	9.2%	5.7%
Education & Health Services	84,394	19.6%	92,437	18.8%	1.8%
Educational Services	38,959	9.0%	42,062	8.6%	1.5%
Health Care and Social Assistance	45,435	10.5%	50,375	10.3%	2.1%
Leisure and Hospitality	45,801	10.6%	55,501	11.3%	3.9%
Arts, Entertainment & Recreation	8,831	2.0%	9,973	2.0%	2.5%
Accommodation and Food Services	36,970	8.6%	45,528	9.3%	4.3%
Public Administration	40,553	9.4%	40,138	8.2%	-0.2%
Other Services exc. Public Administration	13,293	3.1%	15,256	3.1%	2.8%
Unclassified	269	0.1%	*	n/a	n/a
TOTAL	**431,571**	**100.0%**	**490,462**	**100.0%**	**2.6%**

* No data available

Source: North Carolina Division of Employment Security

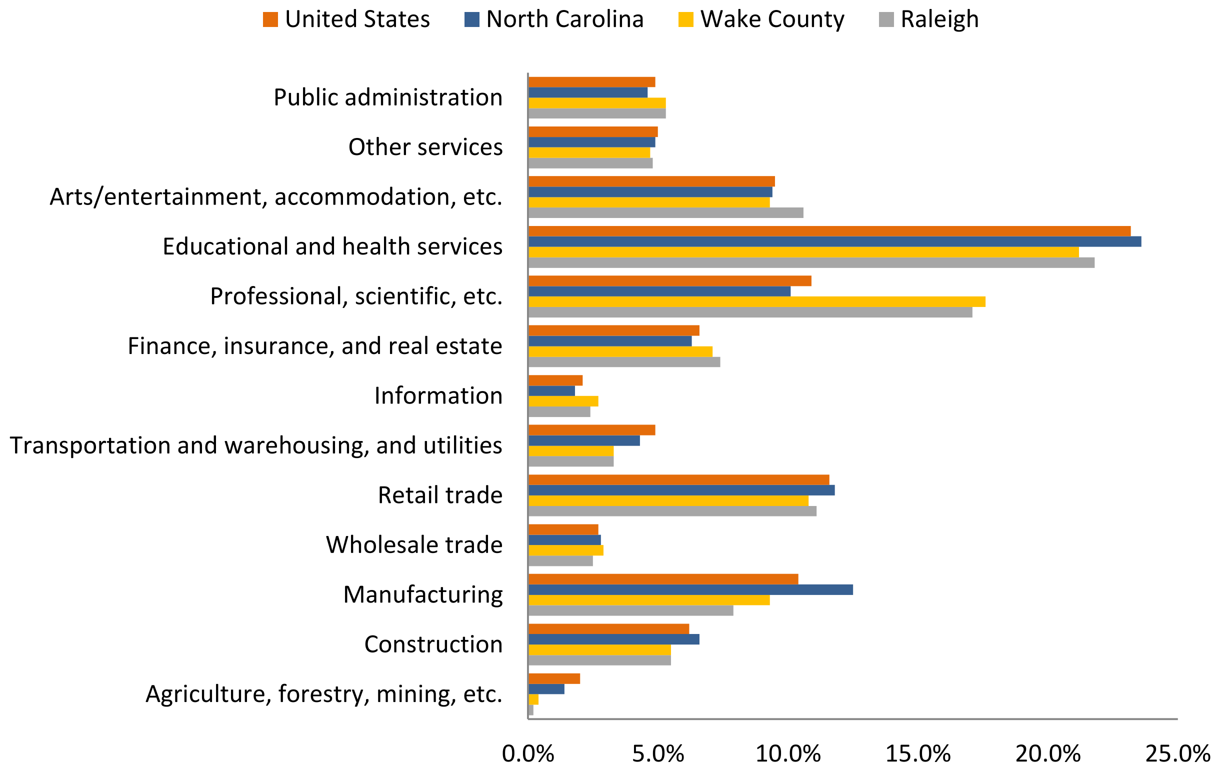
Table 4.2 Wake County Annual Average Employment by Industry

	2008	2009	2010	2011	2012	2013	2014
Goods-Producing	**57,004**	**47,434**	**44,226**	**44,837**	**44,795**	**49,414**	**50,919**
Natural Resources and Mining	1,453	1,447	1,032	1,007	1,028	1126	1,089
Agriculture Forestry Fishing & Hunting	881	899	770	749	788	881	858
Mining	572	548	263	258	240	245	231
Construction	31,870	25,267	24,078	24,506	25,204	25,763	27,223
Manufacturing	23,681	20,720	19,116	19,324	18,563	22,525	22,607
Service-Providing	**395,587**	**385,001**	**387,348**	**397,025**	**411,023**	**424,551**	**439,543**
Trade, Transportation & Utilities	84,187	80,066	80,011	82,110	84,710	84,631	89,439
Utilities	1,397	1,363	1,394	1,397	*	*	2,327
Wholesale Trade	19,898	18,563	18,192	19,152	20,990	20,540	21,009
Retail Trade	51,633	49,435	49,775	51,037	52,040	53,622	56,105
Transportation and Warehousing	11,258	10,708	10,652	10,524	10,468	9,594	9,998
Information	16,527	16,461	16,333	16,963	17,447	17,664	18,433
Financial Activities	25,660	25,375	25,666	25,142	25,030	24,952	25,513
Finance & Insurance	16,958	17,250	17,971	17,463	17,298	17,010	17,373
Real Estate and Rental and Leasing	8,702	8,125	7,695	7,680	7,732	7,942	8,140
Professional and Business Services	82,125	78,473	81,028	85,987	91,441	99,455	102,826
Professional and Technical Services	38,808	36,852	37,086	39,563	42,177	45,296	47,185
Management of Companies & Enterprises	10,089	9,553	9,613	10,232	10,142	10,660	10,277
Administrative and Waste Services	33,228	32,068	34,329	36,192	39,122	43,499	45,364
Education & Health Services	85,914	85,467	84,394	85,780	88,177	90,081	92,437
Educational Services	39,921	39,575	38,959	39,388	40,420	40,715	42,062
Health Care and Social Assistance	45,993	46,989	45,435	46,392	47,758	49,366	50,375
Leisure and Hospitality	43,939	45,285	45,801	47,918	50,765	53,180	55,501
Arts, Entertainment & Recreation	6,892	8,847	8,831	9,105	9,293	9,892	9,973
Accommodation and Food Services	37,047	36,439	36,970	38,813	41,473	43,288	45,528
Public Administration	39,588	39,551	40,553	39,491	38,789	39,768	40,138
Other Services exc. Public Administration	15,146	13,066	13,293	13,634	14,659	14,820	15,256
Unclassified	2,501	1,257	269	*	5	*	*
TOTAL	**452,587**	**432,430**	**431,571**	**441,859**	**455,814**	**473,964**	**490,462**

* No data available

Source: North Carolina Division of Employment Security

Figure 4.1 Jobs by Industry Comparison, 2014



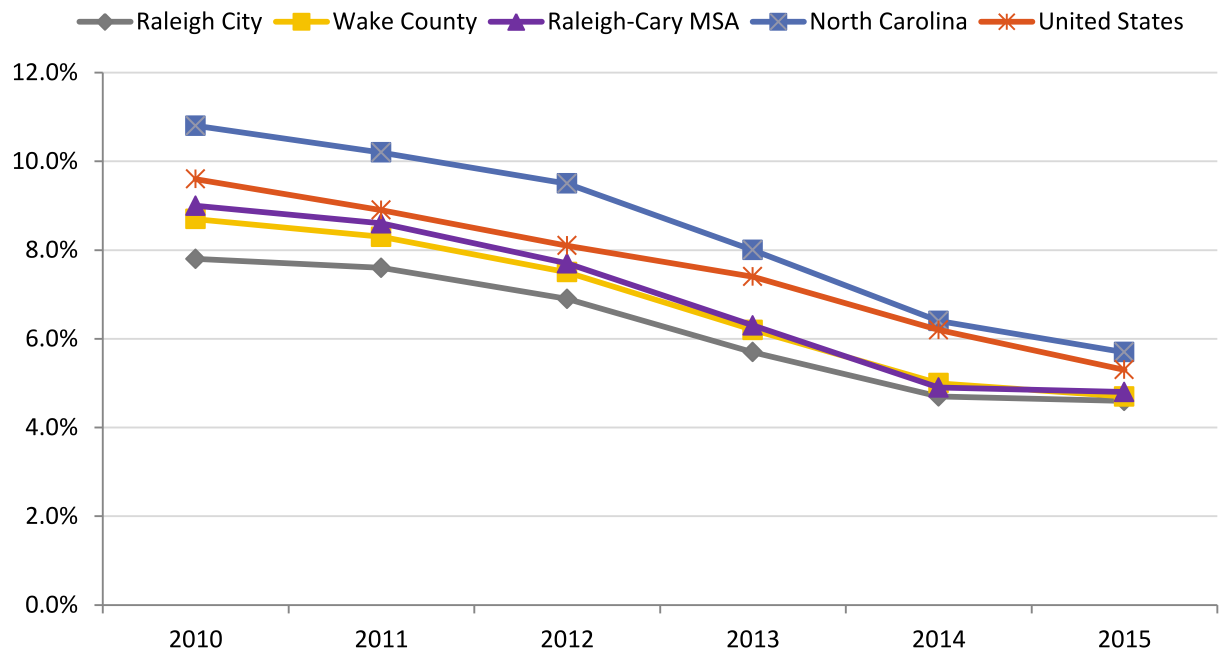
Source: 2010 - 2014 American Community Survey, 5-year Estimates

4.2 Unemployment Rates and Employment Projections

From 2010 to 2015, 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 4.5% in 2007 to a high of 7.8% in 2010; the 2015 average unemployment rate was 4.6%.

According to a model created 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/planning-for-the-future.

Figure 4.2 Average Annual Unemployment Rates



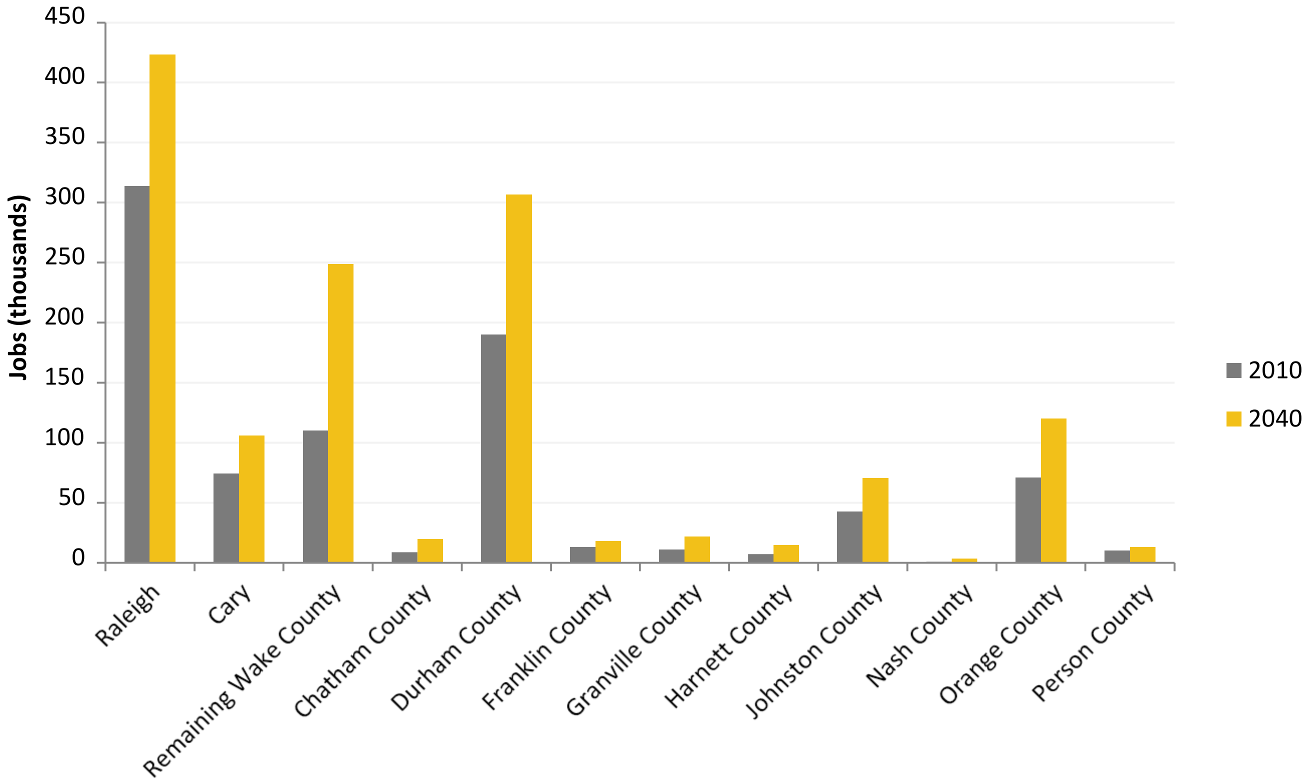
Source: North Carolina Division of Employment Security
**Raleigh-Cary MSA data does not include December 2015 data due to data not being released at time of publication*

Table 4.3 Triangle Region Interim Employment Projections

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. The ten largest individual employers in Raleigh include the State, Wake County Public Schools, and WakeMed Hospitals; together these ten organizations account for approximately 80,000 jobs.

In 2015, 44 major companies announced either new operations or expansions of present operations in Raleigh with an estimated dollar investment of over $146 million (see Table 4.6).

Table 4.5 Major Employers located in Raleigh, 2014

Rank	Name	Countywide Employment (Approximate)	Industry	Location in Raleigh
1	State of North Carolina	24,083	Public Administration	Yes
2	Wake County Public School System	18,554	Education & Health Services	Yes
3	WakeMed Health & Hospitals	8,422	Education & Health Services	Yes
4	North Carolina State University	7,876	Education & Health Services	Yes
5	Rex Healthcare	5,300	Education & Health Services	Yes
6	N.C. DHHS	3,800	Public Administration	Yes
7	Duke Energy Progress	3,700	Trade, Transportation & Utilities	Yes
8	Wake County Government	3,692	Public Administration	Yes
9	City of Raleigh	3,673	Public Administration	Yes
10	Fidelity Investments	2,900	Financial Activities	Yes

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

Table 4.6 New & Expanding Companies in Raleigh, August 2014 - December 2015

Name	New Jobs	Investment ($ millions)	New or Expanding	Industry
Acorn Applications	5	n/a	Expanding	Software/IT
BrewPublik	n/a	n/a	New	Technology & Distribution
Brown Fleet Services	20	n/a	New	Logistics
Carvana	20	n/a	New	Software/IT
CommunityOne Bank	n/a	n/a	New	Financial Services
Compass Rose Brewery	n/a	n/a	New	Brewery
Comstar Supply	n/a	n/a	New	Advanced Manufacturing
Concord Hospitality Enterprises	n/a	n/a	Expanding	Hospitality
Dimension Data	n/a	n/a	Expanding	Software/IT
Distil Networks	12	n/a	Expanding	Software/IT
Expion	15	n/a	Expanding	Software/IT
Guidebook	20	n/a	New	Software/IT
Hatteras Funds	n/a	n/a	Expanding	Financial Services
Hilton Garden Inn Raleigh-Crabtree	n/a	n/a	New	Hospitality
INC Research	190	n/a	Expanding	Clinical Research
Industrious	n/a	n/a	New	Shared Office
Intelligent Office	3	n/a	New	Shared Office
Ipreo	50	n/a	Expanding	Software/IT
Kadro Solutions	40	n/a	Expanding	Software/IT
Kimley-Horn	n/a	n/a	Expanding	Engineering & Design
KnowledgeTree	3	n/a	Expanding	Software/IT
Marriott Autograph Collection	n/a	n/a	Expanding	Hospitality
Marriott Hotel	n/a	n/a	New	Hospitality
Mohu	45	n/a	Expanding	Software/IT
Pendo	16	n/a	Expanding	Software/IT
Personify	n/a	n/a	Expanding	Recruitment Firm
PointSource	100	n/a	Expanding	Software/IT

Polsinelli	n/a	n/a	New	Healthcare Law Firm
Practichem	n/a	n/a	Expanding	Advanced Medical Technologies
Qlik Technologies	n/a	n/a	Expanding	Software/IT
Queue Software	12	n/a	New	Software/IT
Resource Environmental Solutions	n/a	n/a	Expanding	Environmental Consulting
Schmalz	n/a	7	Expanding	Advanced Manufacturing
SFW	n/a	n/a	New	Marketing
SimpliVity	30	n/a	Expanding	Software/IT
Sprout Pharmaceuticals	170	n/a	Expanding	Biotech/Pharma
Syska Hennessy Group, Inc.	n/a	n/a	New	Consulting
Triangle Springs	n/a	15.8	New	Healthcare
Trophy Brewing Company	n/a	n/a	Expanding	Brewery
Wake Health Services	n/a	13	Expanding	Healthcare
WakeMed Health & Hospitals	n/a	10.6	Expanding	Healthcare
Winwood Hospitality Group	n/a	n/a	New	Hospitality
Workplace Options	70	n/a	Expanding	Insurance
Xellia Pharmaceuticals	50	100	Expanding	Biotech/Pharma
Total:	**871**	**$146**		

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

4.4 Non-Residential Building Activity & Cost of Living

After a strong year of non-residential building activity in 2014, Raleigh experienced robust but slightly slower growth in 2015. Three out of the five categories – Commercial, Industrial, and Office – experienced some of the best numbers seen since the beginning of the Recession. In particular, the Industrial building category saw the best year in terms of overall permits, construction cost, and square footage permitted since 2007. However, year-on-year declines in the Institutional and Other category prevented the 2015 square footage and construction cost numbers from surpassing those seen in 2014.

At 199, the overall number of permits recorded in 2015 is the highest since 2008. The 3.85 million square feet and approximately $416 million worth of construction permitted was also the highest since 2008, with the exception of last year (see Table 4.12).

Table 4.7 Raleigh Commercial Building Activity

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
2013	16	246,234	$27,798,301
2014	24	596,375	$65,179,067
2015	23	709,735	$100,908,455
TOTAL	251	6,360,025	$793,902,833

Source: City of Raleigh Development Services Department

Table 4.8 Raleigh Office Building Activity

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
2013	9	363,100	$26,180,658
2014	20	1,701,591	$109,896,279
2015	15	947,374	$123,938,256
TOTAL	225	9,036,220	$893,122,629

Source: City of Raleigh Development Services Department

Table 4.9 Raleigh Industrial Building Activity

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
2013	5	149,230	$7,017,000
2014	9	142,889	$8,609,361
2015	16	395,375	$20,555,006
TOTAL	110	1,970,030	$107,363,356

Source: City of Raleigh Development Services Department

Table 4.10 Raleigh Institutional Building Activity

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
2013	19	239,599	$26,949,240
2014	36	1,351,236	$273,003,337
2015	23	749,370	$121,194,803
TOTAL	302	4,912,735	$855,600,258

Source: City of Raleigh Development Services Department
**Includes uses such as hospitals, schools, community centers, community clubhouses, and retirement homes*

Table 4.11 Raleigh Other* Building Activity

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
2013	101	623,262	$31,359,616
2014	109	1,475,172	$125,935,249
2015	122	1,049,419	$49,226,608
TOTAL	1,022	9,781,061	$562,382,400

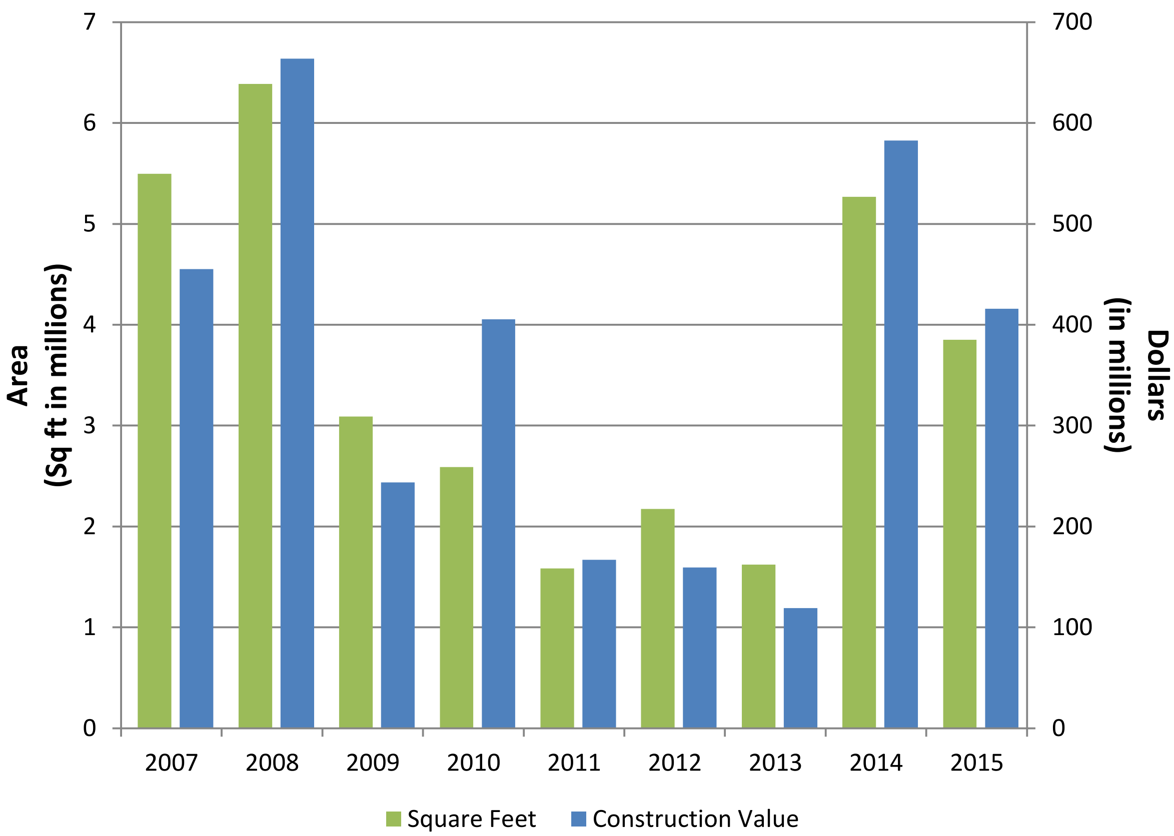
Source: City of Raleigh Development Services Department
**Includes parking garages, out buildings, cell phone towers, etc*

Table 4.12 Raleigh All Non-Residential Building Activity

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
2013	150	1,621,425	$119,304,815
2014	198	5,267,263	$582,623,293
2015	199	3,851,273	$415,822,608
TOTAL	**1,910**	**32,060,071**	**$3,212,370,956**

Source: City of Raleigh Development Services Department

Figure 4.4 Raleigh All Non-Residential Building Activity



Source: City of Raleigh Development Services Department

Founded in 1961, the Council for Community and Economic Research (C2ER) has been conducting city-to-city cost-of-living comparisons for over 50 years. Their 2015 Cost of Living Index assessed Raleigh as having a lower composite cost of living score than peer cities such as Atlanta, GA, Charlotte, NC, and Austin, TX (see Table 4.13). Significantly, Raleigh had a very low cost of housing score as compared to the national average, and it ranked as the third lowest cost city among the country's largest 40 metropolitan areas. This shows that while certain areas and segments of the population face affordability pressures, Raleigh as a whole remains comparatively affordable.

Table 4.13 Metro Area Cost of Living Index Comparison, 2015 Annual Average Data

	100% Composite Index	Grocery Items	Housing	Utilities	Transportation	Health Care	Misc. Goods & Services
Raleigh, NC	90.5	102.3	72.4	98.0	89.6	99.6	97.6
Atlanta, GA	99.9	103.7	97.4	93.5	105.0	101.4	100.5
Austin, TX	96.0	84.2	90.3	101.5	97.7	103.5	102.2
Charlotte, NC	103.7	101.0	107.9	92.1	94.1	108.6	107.4
Nashville-Franklin, TN	95.2	95.7	82.1	97.5	98.1	86.6	105.7
Orlando, FL	98.2	104.8	95.3	95.8	102.2	95.0	97.9
Charleston, SC	101.0	106.6	96.2	115.4	91.5	106.4	100.7

Source: Council for Community and Economic Research (C2ER), Cost of Living Index, 2015 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 2010-2014 American Community Survey, 48% of Raleigh's renter households pay more than 30% of their income in housing costs compared to 25% 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, 2014

Renters Annual Income Category	Total Renter Households	Number of Burdened Households	Percent of Burdened Households
Less than $10,000	8,364	6,459	77%
$10,000 to $19,999	12,606	11,621	92%
$20,000 to $34,999	17,305	13,722	79%
$35,000 to $49,999	13,939	4,473	32%
All Households <$50,000	**52,214**	**36,275**	**68%**
$50,000 or more	25,591	1,389	5%
All Households	**77,805**	**37,664**	**48%**

Owners Annual Income Category	Total Owner Households	Number of Burdened Households	Percent of Burdened Households
Less than $20,000	4,632	4,031	87%
$20,000 to $34,999	7,587	5,043	66%
$35,000 to $49,999	10,669	5,810	54%
All Households <$50,000	**22,888**	**14,884**	**65%**
$50,000 or more	65,249	6,870	11%
All Households	**88,137**	**21,754**	**25%**

Source: 2010 - 2014 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	8,364	$250 (based on $10,000)	$722	($472)
$10,000 to $19,999	12,606	$375 (based on $15,000)	$722	($347)
$20,000 to $34,999	17,305	$687 (based on $27,500)	$722	($35)
All Households ≤ $34,999	**38,275**			

** This figure is for the Raleigh-Cary Metropolitan Statistical Area (MSA).*
Source: 2010 - 2014 American Community Survey,5-year Estimates; U.S. Department of Housing and Urban Development, FY2014 Fair Market Rent Documentation System

Table 5.3 Number of Assisted Affordable Housing Units

City of Raleigh Affordable Rental Units	196
Raleigh Housing Authority Units	1,445
Rental Units with Funding from HUD (e.g. Section 202)	1,133
Low-Income Housing Tax Credit (LIHTC) Units (no City funds)	3,164
Rental Units with Funding from City of Raleigh (Joint Venture)	3,309
Homeownership Units with Funding from City of Raleigh	490
Second Mortgages Provided by City of Raleigh	1,209
Raleigh Housing Authority Housing Choice Vouchers (Section 8)	3,869
Total	14,635

Source: City of Raleigh Community Development Division, 2015

5.2 Home Sales, Average Rent, Residential Building Activity

From 2010 to 2015, sales data of different residential building types have charted separate courses. In constant dollars, the median sales price for single-family detached units has generally increased from 2009 to 2015 (see Table 5.4), while the median sales price for condominiums had a relatively steady downward trajectory. Median sales prices for townhouses mostly decreased during the recessionary years and then regained their value. From 2014 to 2015, single-family detached homes and townhouses both saw significant increases in median sales price, while the median sales price for condominiums decreased slightly (see Table 5.5).

Looking at residential sales by price range, the highest number of single family homes sold during 2015 had a price tag of over $400,000, although sales of homes between $150,001 to $200,000 were not far behind (see Table 5.6). For townhouses, the price range with the highest number of sales was $150,001 to $200,000, while condominiums ranged from $100,001 to $150,000. 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 American Community Survey indicates that median rents for the city of Raleigh have annually increased over the past 5 years (see Table 5.7). In 2014, median gross rent in the city was estimated to be $914.

Looking at residential permit activity for 2015, apartments represented the largest category in terms of permit numbers (2,723 units permitted, or 67% of all residential building permits issued), square footage (3,611,532), and construction value ($234,905,807) (see Table 5.8).

Table 5.4 Median Sales Price by Unit Type (in 2015 dollars)

	2009	2010	2011	2012	2013	2014	2015
Single-Family Detached	$236,722	$242,131	$224,807	$237,181	$236,921	$233,777	$247,500
Townhouse	$172,161	$175,898	$155,715	$161,902	$165,436	$163,193	$170,250
Condominium	$150,089	$145,494	$138,699	$139,215	$123,822	$126,150	$124,000

Source: Wake County Revenue Department

Table 5.5 Percent Change in Median Sales Price by Unit Type (in 2015 dollars)

	2009 to 2010	2010 to 2011	2011 to 2012	2012 to 2013	2013 to 2014	2014 to 2015
Single-Family Detached	2.3%	-7.2%	5.5%	-0.1%	-1.3%	5.9%
Townhouse	2.2%	-11.5%	4.0%	2.2%	-1.4%	4.3%
Condominium	-3.1%	-4.7%	0.4%	-11.2%	1.9%	-1.7%

Source: Wake County Revenue Department

Table 5.6 Numbers of Residential Sales by Price Range and Type of Unit, 2015

Price Range of Sales	Single Family	Townhouse	Condo	All Units
$25,000 - $100,000	124	111	219	454
$100,001 - $150,000	563	650	252	1,465
$150,001 - $200,000	856	794	84	1,734
$200,001 - $250,000	792	296	67	1,155
$250,001 - $300,000	617	190	47	854
$300,001 - $350,000	386	53	40	479
$350,001 - $400,000	299	60	24	383
over $400,000	904	76	46	1,026
Total	4,541	2,230	779	7,550

Source: Wake County Revenue Department

Table 5.7 Raleigh Annual Median Gross Apartment Rent

Year	Gross Rent
2010	$828
2011	$855
2012	$875
2013	$897
2014	$914

Source: 2006-2010, 2007-2011, 2008-2012, 2009-2013 and 2010-2014 American Community Survey 5-year Estimates

Table 5.8 Raleigh Residential Building Activity, 2015

Residential Type	No. of Units Permitted	Square Feet	Construction Value
Single Family	966	3,303,968	$338,923,570
Townhouse	310	663,542	$34,973,622
Condominium	42	211,585	$6,861,700
Apartment	2,723	3,611,532	$234,905,807
TOTAL	**4,041**	**7,790,627**	**$615,664,699**

Source: City of Raleigh Development Services Department
**Refer to Figure 2.8 for a multi-year comparison of residential units permitted*

Chapter 6: Transportation

This section 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 Context

The performance of the transportation system is a major factor for a community's economic prosperity and quality of life. The transportation system provides for accessibility to employment, services, goods, entertainment, and other daily needs. It also provides longer-distance mobility of people and goods, and 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 streets and highways, public transportation systems, bicycle network, pedestrian network, and greenway trail network. Together, all of these modes of transportation provide accessibility and mobility in support of desired land use patterns, community form, and sense of place.

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 regional planning, capital improvement planning
- **North Carolina Department of Transportation (NCDOT)**: Long range planning on some major streets, capital improvement planning, construction/implementation on some major streets
- **Raleigh Department of City Planning**: Long range planning, capital improvement planning
- **City of Raleigh Public Works Department**: Construction, implementation, and operation of the transportation system
- **GoTriangle**: Long range regional transit planning, capital improvement planning, construction and implementation

6.2 Capital Improvement Program

The transportation capital program includes major street design and construction, street improvements, pedestrian and bicycle projects, downtown parking improvements, and transit projects. Total proposed funding for the five-year transportation program is $125 million, with $43.1 million planned for FY 2016.

The FY 2016 Capital Improvement Program (CIP) includes matching city funds for several projects awarded through the Capital Area Metropolitan Planning Organization's (CAMPO) Locally Administered Project Program (LAPP). The program distributes federal transportation funding directly allocated to local governments through a competitive process annually. Raleigh was able to successfully receive $9.4 million for five projects by leveraging project funds budgeted in FY15 and $261,000 for new projects in FY16.

The CIP also invests $8.6 million (over five years) in the city's transit system, including facility maintenance and equipment replacement. These funds allow the city to leverage additional federal funds for transit improvements. The bicycle and pedestrian program includes $8.2 million (over five years) for sidewalk construction, maintenance, repair, streetlight installations, and bicycle and facility improvements. Lastly, the CIP includes $6.4 million (over five years) for maintenance and improvements of downtown parking decks. These funds include upgraded parking equipment to accommodate a new fee structure for night and weekend parking.

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.

In recent years, the rate of street resurfacing has been accelerated through a 1¢ property tax increase approved in FY2015. The total resurfacing budget in FY2016 is $7.2 million and the five year total to $38.4 million. The new funding translates to the city being able to resurface approximately 3% of its streets annually, compared to 1% in previous years.

Table 6.1. Transportation Capital Improvement Program

Project Category	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016
Major Street Projects	$2.00 M	$2.23 M	$7.28 M	$5.10 M	$26.20 M	$24.25 M
Street Improvement Program	$2.04 M	$3.36 M	$6.05 M	$6.53 M	$20.93 M	$11.45 M
Bicycle and Pedestrian Improvements	$.91 M	$.30 M	$8.51 M	$9.90 M	$3.25 M	$3.64 M
Studies and Planning Projects	$0	$.30 M	$.20 M	$1.00 M	$.36 M	$.03 M
Transit	$1.21 M	$1.31 M	$7.80 M	$4.55 M	$1.93 M	$2.04 M
Parking	$.62 M	$.68 M	$.41 M	$1.19 M	$.67 M	$1.72 M
Total Transportation Capital Improvement Program	$7.67 M	$8.17 M	$30.25 M	$28.28 M	$53.31 M	$43.13 M

The City of Raleigh's fiscal year is from July 1 to June 30; FY2016 corresponds to the year beginning July 1, 2015.

Source: Raleigh Department of City Planning, Office of Transportation Planning

Table 6.2. Federal Grant Allocations for Transportation Projects, 2011 – 2015

Project Description	STP-DA	CMAQ	TIGER
Sidewalk Improvement Projects	$0.55 M		
Wade Avenue Improvements	$0.51 M		
Priority Bike Striping	$0.12 M		
Lake Wheeler Road Improvements	$1.72 M		
Creedmoor Road Sidewalk Improvements	$1.20 M		
I-40 Overpass Pedestrian Retrofits/Improvements		$2.54 M	
Capital Boulevard Improvements	$0.86 M		
Six Forks Road Sidewalk Improvements		$0.51 M	
Downtown Pedestrian Safety Improvements	$0.12 M		
Citywide Bicycle Improvement Projects		$0.48 M	
Union Station Phase 1			$38.00 M
Capital Boulevard/Peace Street Bridge Replacement	$5.00 M		
New Bern Avenue Pedestrian/Transit Improvements		$1.75 M	
Leesville Road Safe Routes to School	$0.45 M		
Raleigh Bikeshare Implementation		$1.67 M	

STP-DA: Surface Transportation Program - Direct Allocation
CMAQ: EPA Congestion Mitigation and Air Quality Improvement Program
TIGER: USDOT Transportation Investment Generating Economic Recovery

Source: Raleigh Department of City Planning, Office of Transportation Planning

Transportation Projects can be tracked with the Transportation Project Map, available in the Resources section on this page:
http://www.raleighnc.gov/business/content/PlanDev/Articles/TransPlan/TransportationPlanning.html

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. Planning the infrastructure of the entire water system must be with the perspective of the entire region.

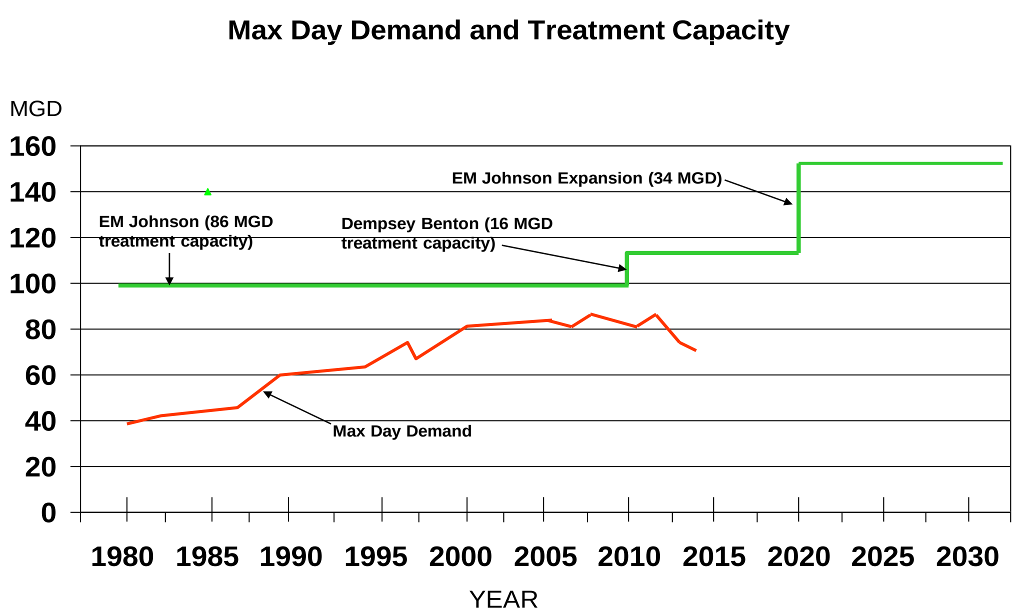
7.1 Wastewater System and Water Demand & Treatment

The city of Raleigh operates four wastewater treatment plants. The maximum capacity for these plants is as follows:

Treatment Plant	Maximum Capacity
Neuse River WWTP	60 MGD
Wrenn Road WWTP	1.2 MGD
Little Creek WWTP	1.85 MGD
Smith Creek WWTP	3.0 MGD

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



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, 2010, and 2015 water quality information for streams within Wake County. The NC Division of Water Quality assessed these sites based on the health of their fish populations. 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.

Overall, a little more than a third of the stream sites (4 of 11) maintained the same bioclassification throughout survey years. Of the remaining 7 sites, only one improved and the other six showed decreased quality overall.

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

Water Body	Monitoring Location	2005	2010	2015
Crabtree Creek	SR 1664	Excellent	Excellent	Excellent
Little River	SR 2224	Good	Good	Good
Middle Creek	SR 1375	Excellent	Good-Fair	Good
New Light Creek	SR 1911	Good	Good	Good
Richland Creek	US 1	Excellent	Good-Fair	Good-Fair
Smith Creek	SR 2045	Fair	Good	Good-Fair
Swift Creek	SR 1152	Not Sampled	Good-Fair	Fair
Terrible Creek	SR 2751	Good	Good	Good-Fair
Upper Barton Creek	NC 50	Good	Good-Fair	Good-Fair
Walnut Creek	South State	Not Sampled	Fair	Fair
Walnut Creek	SR 2544	Good-Fair	Good-Fair	Poor

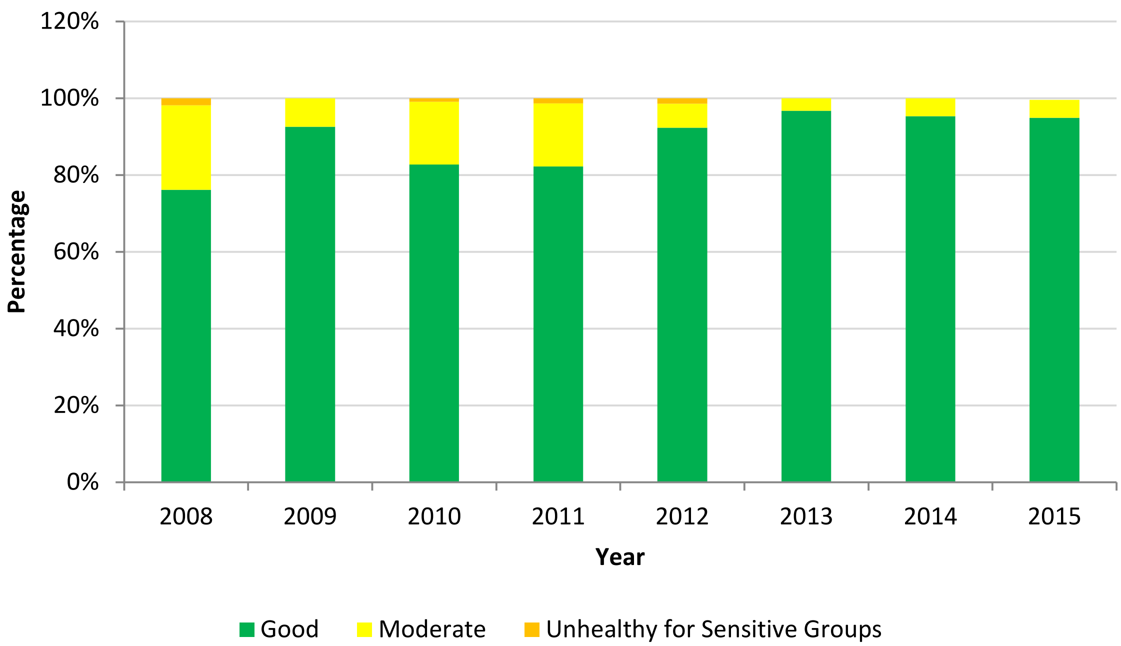
Source: North Carolina Department of Environment and Natural Resources, Division of Water Quality

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 as "good," while seven years later in 2015 95% of days were categorized as "good" (see Figure 8.1 and Table 8.2).

Many experts credit the State's 2002 Clean Smokestacks Act for helping to reduce emissions from coal burning power plants, and thereby improving air quality.

Figure 8.1 Ozone Category Days, Millbrook Monitor



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

Table 8.2 Number of Ozone Rating Days, Millbrook Monitor

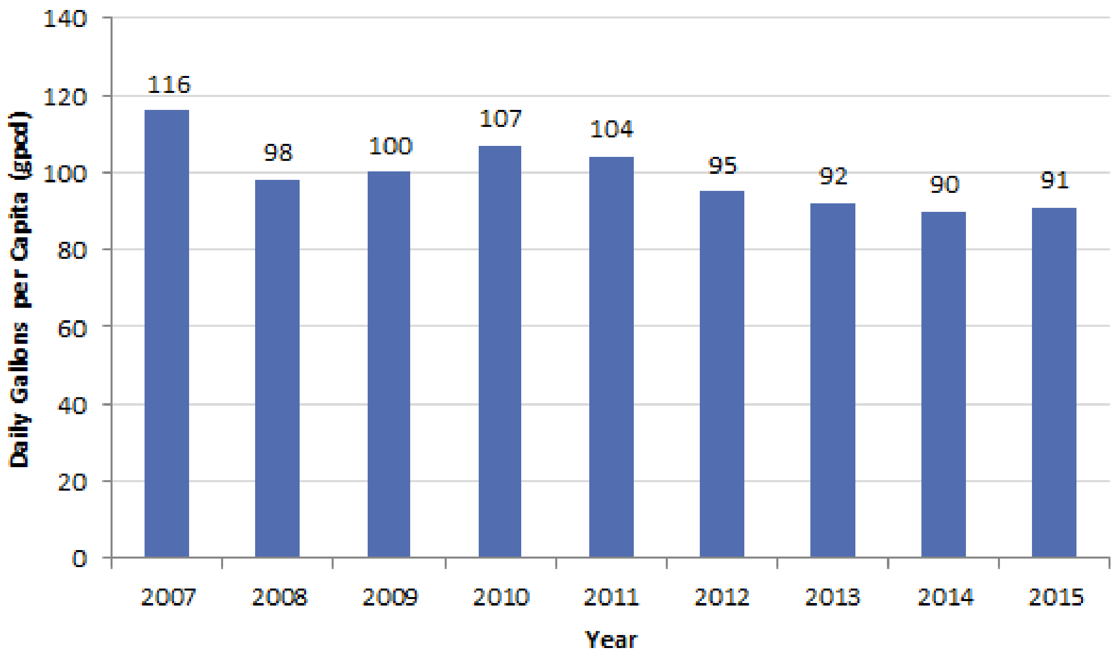
	Good	Moderate	Unhealthy for Sensitive Groups	Unhealthy
2008	163	47	4	0
2009	198	16	0	0
2010	177	35	2	0
2011	176	35	3	0
2012	191	13	3	0
2013	207	7	0	0
2014	204	10	0	0
2015	203	10	0	0

Source: U.S. Environmental Protection Agency, NC Department of Environment and Natural Resources
**Data reported only during ozone forecast season, April-September*

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 generally trended downward over the last nine years from 116 gpcd in 2007 to 91 gpcd in 2014 (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, and the water quality program mandated by the Clean Water Act. In addition, they review and inspect private developments for conformance to stormwater, soil erosion, and floodplain requirements, maintain the drainage system inventory, and respond to citizen inquiries concerning these functions.

The following lists some of the Stormwater Division's projects from Fiscal Year 2014-2015:

- Completed construction of 22 high priority community Drainage Assistance projects valued at approximately $1.2 million and with design in progress for 17 projects valued at $1.53 million.
- Completed 2 infrastructure CIP projects at approximately $1.8 million and 1 water quality CIP project at a cost of $2.03 million
- Completed four stormwater quality cost share retrofit projects valued at more than $50,000. Design is in progress for two newer projects valued at more than $430,000 including innovative stormwater management control measures approved for the City's visionary Union Station redevelopment project.
- The Program acquired the flood prone Milner Inn property along Capital Boulevard at a total cost of $1,075,000. As this acquisition was funded wholly by State and Federal grant money, the City incurred no cost in the furtherance of program efforts to reduce property damage due to flooding. This flood mitigation project will also help advance the City's longer-term vision for restoration of Pigeon House Branch along the Capital Boulevard gateway corridor.

Table 8.3 Stormwater Management Services

	FY 09-10	FY 10-11	FY 11-12	FY 12-13	FY 13-14	FY 14-15
Projects designed/constructed	16	24	35	30	29	27
Plans reviewed	2,951	2,495	2,759	3,929	4,400	6,740
Inspected active sites	8,729	9,165	8,392	7,832	9,000	7,347
Number of permits approved	1,626	1,787	1,050	1,033	1,200	1,868

Source: Public Works, Stormwater Management Division

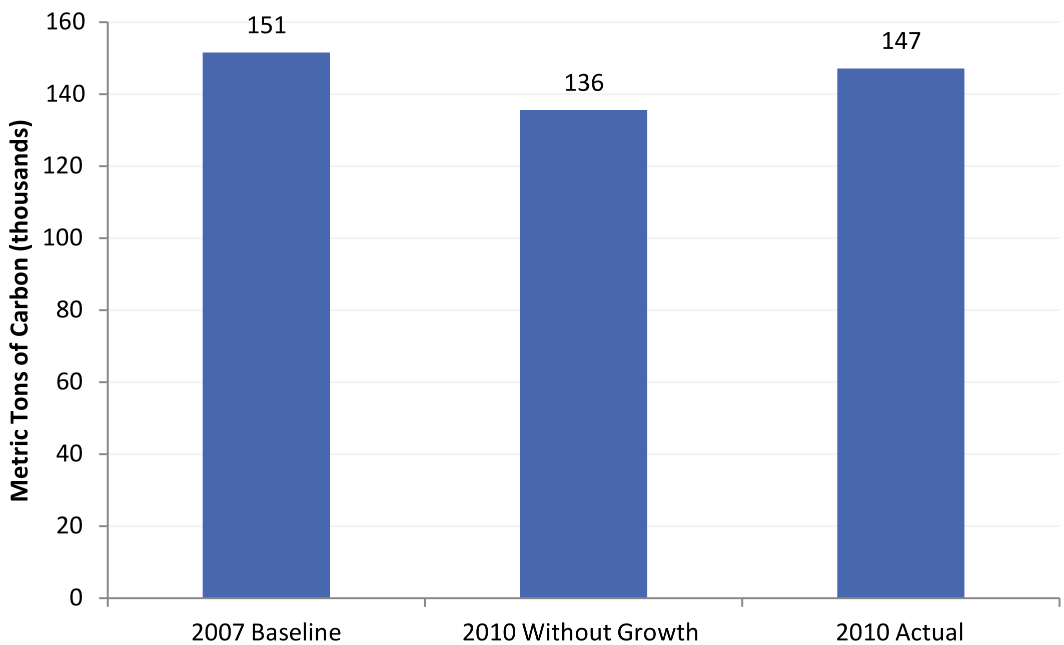
8.5 Greenhouse Gas Emissions

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.

Among other notable projects, in 2015 the City partnered with Duke Energy Progress to replace approximately 30,000 streetlights within city limits and install energy-saving LED fixtures in their place. In addition to reducing the city's carbon footprint, the replacements will also save the City approximately $400,000 every year through reduced energy costs and labor costs since the fixtures have a longer 10-15 year lifespan.

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 and Cultural Resources

9.1 Existing Parks, Recreation and Cultural Resources System and Planning Framework

The Raleigh parks, recreation and cultural resources system has 6,069 acres of land providing 226 parks, open spaces and plazas and more than 3,846 acres of greenway property including 110 miles of existing greenway trails.

In September of 2012 the Parks, Recreation and Cultural Resources Department began the process to create a new Parks, Recreation and Cultural Resources System Plan. The new System Plan was adopted by City Council on May 6, 2014. The new System Plan supplements the City of Raleigh 2030 Comprehensive Plan, which was adopted in 2009.

In the past year, the park system expanded greatly with the purchase of 308-acre Dorothea Dix campus by the City from the North Carolina State Government. In addition, in late 2014 Raleigh citizens voted to pass a $91.775 million bond for the parks system, which will allow for upgrades and improvements to many existing parks.

The City's parks, greenways and cultural resources are invaluable assets for cultural pursuits, natural conservation and active and passive lifestyle activities. The Parks, Recreation and Cultural Resources Department publishes the "Leisure Ledger" on a regular basis to provide a listing of the park, recreation and cultural resources 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 developed parks primarily consists of 47 neighborhood parks, 25 community parks, and 10 metro parks, encompassing approximately 4,680 acres of land. Initiated by public input into the System Plan and an Action Item for Implementation, the department is developing a new classification system based on experiences. The current 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 136 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
Abbotts Creek	Community	29.12
Alvis Farm	Community	95.92
Anderson Point	Community	89.57
Baileywick	Community	50.16
Barwell Road	Community	54.47
Biltmore Hills	Community	46.67
Brier Creek	Community	9.98
Carolina Pines	Community	38.71
Green Road	Community	26.60
Halifax	Community	4.73
Hodges Mill Creek Property	Community	49.16
Jaycee	Community	24.85
John Chavis Memorial	Community	28.87
Lake Lynn	Community	51.99
Laurel Hills	Community	48.18
Leesville	Community	57.63
Leonard Tract	Community	83.60
Lions	Community	41.41
Marsh Creek	Community	110.61
Milburnie	Community	88.17

Millbrook-Exchange	Community	69.53
Optimist	Community	30.72
Thornton Road Property	Community	130.61
Watkins Road Property	Community	38.36
Worthdale	Community	36.14
	Community Total	**1,336**
Buffaloe Road Athletic	Metro	165.58
Dorothea Dix	Metro	306.83
Forest Ridge	Metro	586.81
Forest Ridge Access	Metro	2.52
Lake Johnson	Metro	167.06
Lake Wheeler	Metro	873.92
Pullen	Metro	66.38
Shelley Lake - Sertoma	Metro	144.80
Walnut Creek North	Metro	104.84
Walnut Creek South	Metro	204.71
	Metro Total	**2,623.45**
Annie Louise Wilkerson, MD	Nature Preserve	157.60
Durant Nature	Nature Preserve	241.58
Horseshoe Farm	Nature Preserve	146.26
Lake Johnson	Nature Preserve	305.29
	Nature Preserve Total	**851**
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 Property	Neighborhood	18.27
Fallon	Neighborhood	10.33
Forestville Road Property	Neighborhood	26.29
Fred Fletcher	Neighborhood	21.36
Glen Eden	Neighborhood	20.41

Greystone Recreation Center	Neighborhood	0.22
Highhill Road Property	Neighborhood	6.43
Hill Street	Neighborhood	16.54
Honeycutt	Neighborhood	29.99
Isabella Cannon	Neighborhood	3.53
John P Top Greene	Neighborhood	1.32
Kaplan	Neighborhood	5.19
Kentwood	Neighborhood	14.63
Kingwood Forest	Neighborhood	4.18
Kiwanis	Neighborhood	24.14
Kyle Drive Property	Neighborhood	27.24
Longview	Neighborhood	6.91
Maybrook	Neighborhood	38.22
Method	Neighborhood	8.32
North Hills	Neighborhood	31.92
Oakwood	Neighborhood	12.72
Peach Road	Neighborhood	6.96
Perry Creek Road Property	Neighborhood	26.46
Poole Road Property	Neighborhood	5.99
Powell Drive	Neighborhood	8.64
Ridge Road	Neighborhood	6.78
Roanoke	Neighborhood	1.62
Roberts	Neighborhood	7.20
Sanderford Road	Neighborhood	23.48
Sierra Drive Property	Neighborhood	2.45
Southgate	Neighborhood	8.84
Spring Forest Road	Neighborhood	21.81
Strickland	Neighborhood	36.10
Sunnybrook Road Property	Neighborhood	20.57
Tarboro Road	Neighborhood	3.18
Williams	Neighborhood	8.71
Windemere Beaver Dam	Neighborhood	14.77
Wooten Meadow	Neighborhood	20.50
	Neighborhood Park Total:	**692.45**
	Total Acres:	**5,502.9**

Source: City of Raleigh Parks, Recreation and Cultural Resources 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 3,846 acres of greenway land through its community wide, Capital Area Greenway System. The City has a total of 26 separate greenway trails that span over 110 miles. On January 6, 2015, the City Council adopted a new Capital Area Greenway Planning and Design Guide. 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 & Recreation. Residents from Triangle communities use the park for hiking, viewing wildlife, off- road biking, and other recreational pursuits. This park includes a 500 acre lake and 215 upland acres with an extensive trail system. Greenway trail access from Raleigh to Umstead Park also connects with the Town of Cary's greenway system and Lake Crabtree County Park.

9.4 Future Park and Open Space Needs

The following table addresses needs based on the 2004 Park Plan. The department is currently developing a new model to better define needs of the community to maintain a high level of service.

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 1,000 people)	Additional Acres Needed by 2030	Projected Park Size (Acres)	New Parks Needed to Meet 2030 LOS	Total Parks Needed by 2030
Neighborhood Parks	722**	51*	2.6	824*	15	55	105**
Community Parks	1,336	25	3.11	468	60	8	33
Metro Parks	2,623.45	10	4.23	0	300	0	8
Nature Preserves	851	4	N/A	N/A	N/A	N/A	4
Special Parks	536.62	136	N/A	N/A	N/A	N/A	137
Greenway Corridors	3845.7	N/A	N/A	1,118	N/A	N/A	N/A
Total	7,698	226	N/A	2,410	N/A	63	287

Source: City of Raleigh Parks, Recreation and Cultural Resources Department

* *Includes five school parks that are recognized as currently serving community needs as Neighborhood Parks*

** *Presumes six acres equivalent for each of five school parks currently functioning as Neighborhood Parks*

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	13,851	5220 Greens Dairy Road, 27616
Northwest	61	46	11,000	8016 Glenwood Avenue, 27612
The Academy	8	10	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
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**	**224,546**	

Source: City of Raleigh Police Department

Table 10.2 Fire Services

Performance Measures	Actual FY 2012	Actual FY 2013	Actual FY 2014	Actual FY 2015	Projected FY 2016
Fire calls answered	1,354	1,077	1,133	1,227	1,135
Rescue and EMS calls answered	21,912	21,951	23,119	22,356	22,373
Fires investigated	326	258	265	251	260
Permits issued	844	1,272	1,738	1,730	1750
Average hours per fire call (hrs)	1.01	0.92	0.55	0.57	1.00
Average hours per EMS call (hrs)	.33	0.33	0.20	0.20	0.20
Average response time to emergency calls (min)	4.45	4.43	4.43	4.44	4.41
Percent citizens reached by public fire education	9%	10%	10%	10%	10%

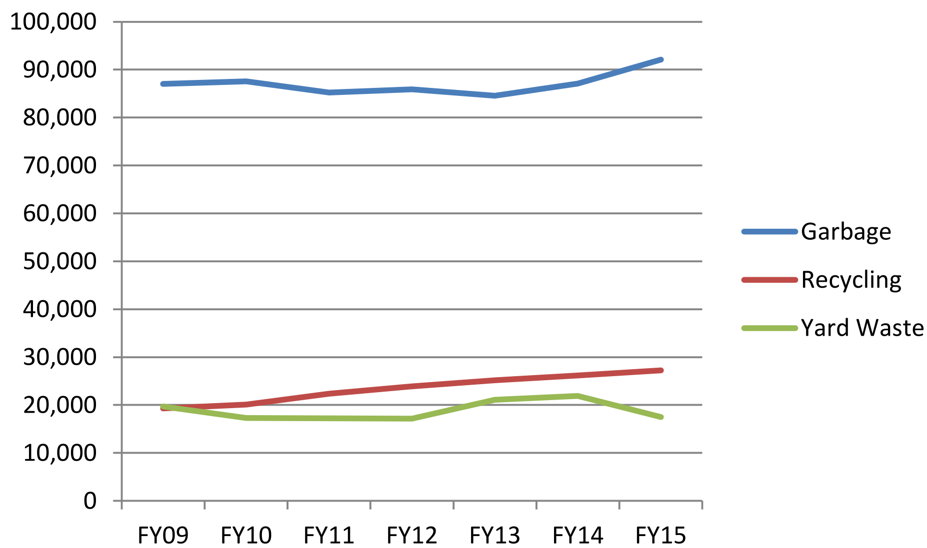
Source: City of Raleigh Fire Department

Table 10.3 Solid Waste Services Equipment

Number	Type
98	Large vehicles
52	Automated refuse collectors
40	Rear loader garbage and yard waste collectors
2	Split body rear loaders (collect garbage and recycling at same
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 10.4 Solid Waste Collections in Tons



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 2015, preservation planning staff and the RHDC processed 181 COAs.

Raleigh currently has a total of 165 Local Historic Landmarks, 28 National Register Historic Districts, 6 Historic Overlay Districts, and 3 National Historic Landmarks. RHDC is Raleigh City Council's official historic preservation advisory body to identify, preserve, protect, and promote Raleigh's historic resources.