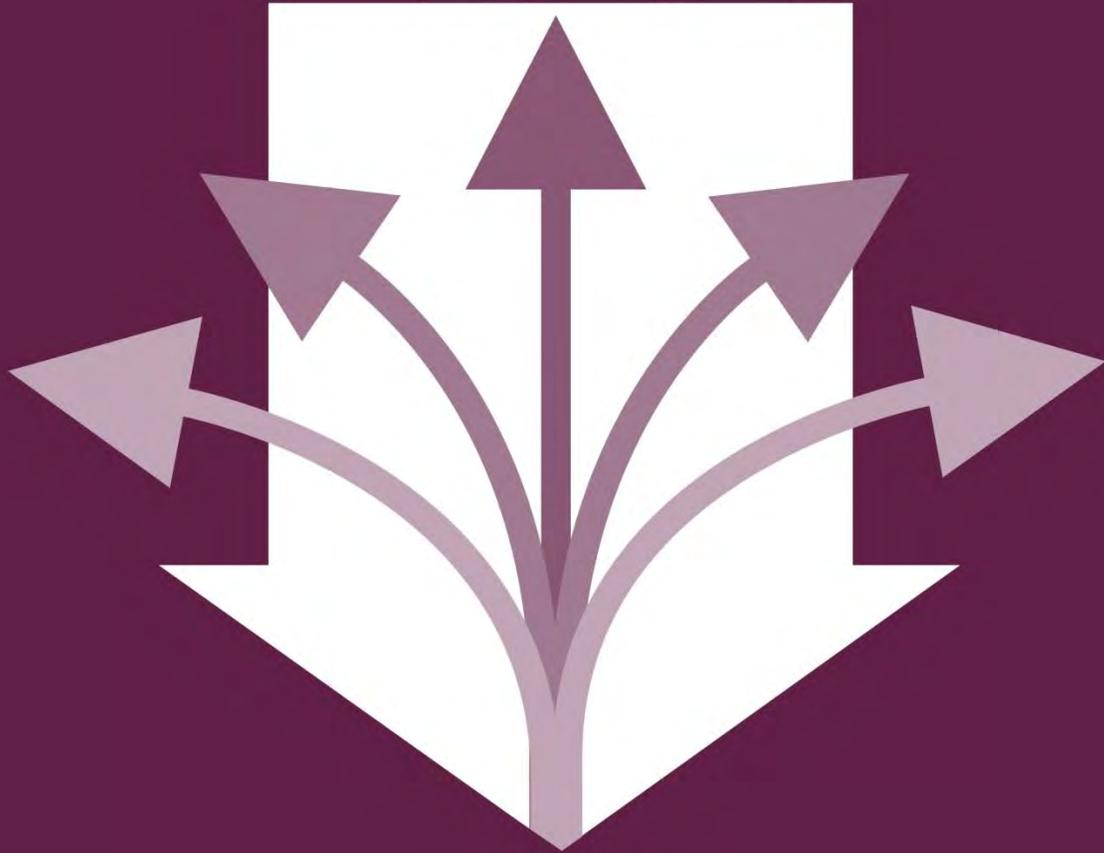


**2011**



**Forsyth County  
Trends and Development Patterns**

## INTRODUCTION

The *2011 Forsyth County Trends and Development Patterns* report describes trends in development approvals and building permits between 2006 and 2011, with additional sources included for population and employment trends comparisons and analysis. Development information for 2010 and 2011 from the Clemmons and Kernersville Planning Departments has been included to give a more complete picture of development trends.

The *2011 Forsyth County Trends and Development Patterns* report is intended to be “easy-to-use” by including mostly charts, tables and pictures under individual headings. Accompanying text provides only general explanatory descriptions. Most information is attainable by examining the charts only.

The basic building blocks for conveying county data are 20 geographic “planning areas,” which have been aggregated into five geographic categories (irrespective of political jurisdictions) for comparison purposes: Winston-Salem’s **Downtown**; the **Urban Area**; the **Suburban Ring**; outlying **Perimeter Communities**; and designated **Rural Areas**. A more detailed description of these areas is provided on page 8.

Selected data is given for all incorporated communities in Forsyth County (e.g. population and tax base), in addition to data available only for Winston-Salem and Forsyth County (e.g. unemployment rates).

This report makes use of data from a variety of sources and time-frames including: the planning departments of Clemmons, Kernersville and Lewisville, the North Carolina Employment Security Commission, the Demographics Branch of the North Carolina State Office of State Budget and Management, the North Carolina Department of State Treasurer, the United States Census Bureau, the Bureau of Labor Statistics of the United States Department of Labor, the Winston-Salem Transit Authority and the City-County Inspections Division.

Thanks to each of these agencies for providing information upon request or having information available on web sites.

A few charts provide comparisons to *Legacy* benchmarks. The *Legacy Development Guide* is a citizen-supported, 15-year long policy guide for Winston-Salem and Forsyth County that was adopted by all Forsyth County jurisdictions in 2001. *Legacy* benchmarks are measured annually in determining progress toward specified development goals.

Please contact the City-County Planning Department at 336-727-8000, or at [planning@cityofws.org](mailto:planning@cityofws.org) regarding any inquiries about the report.

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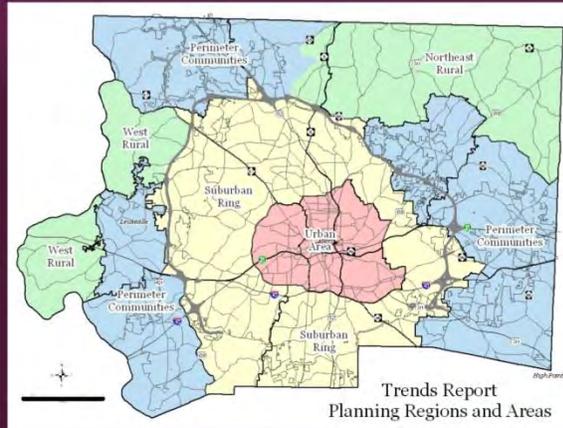
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# Planning Areas

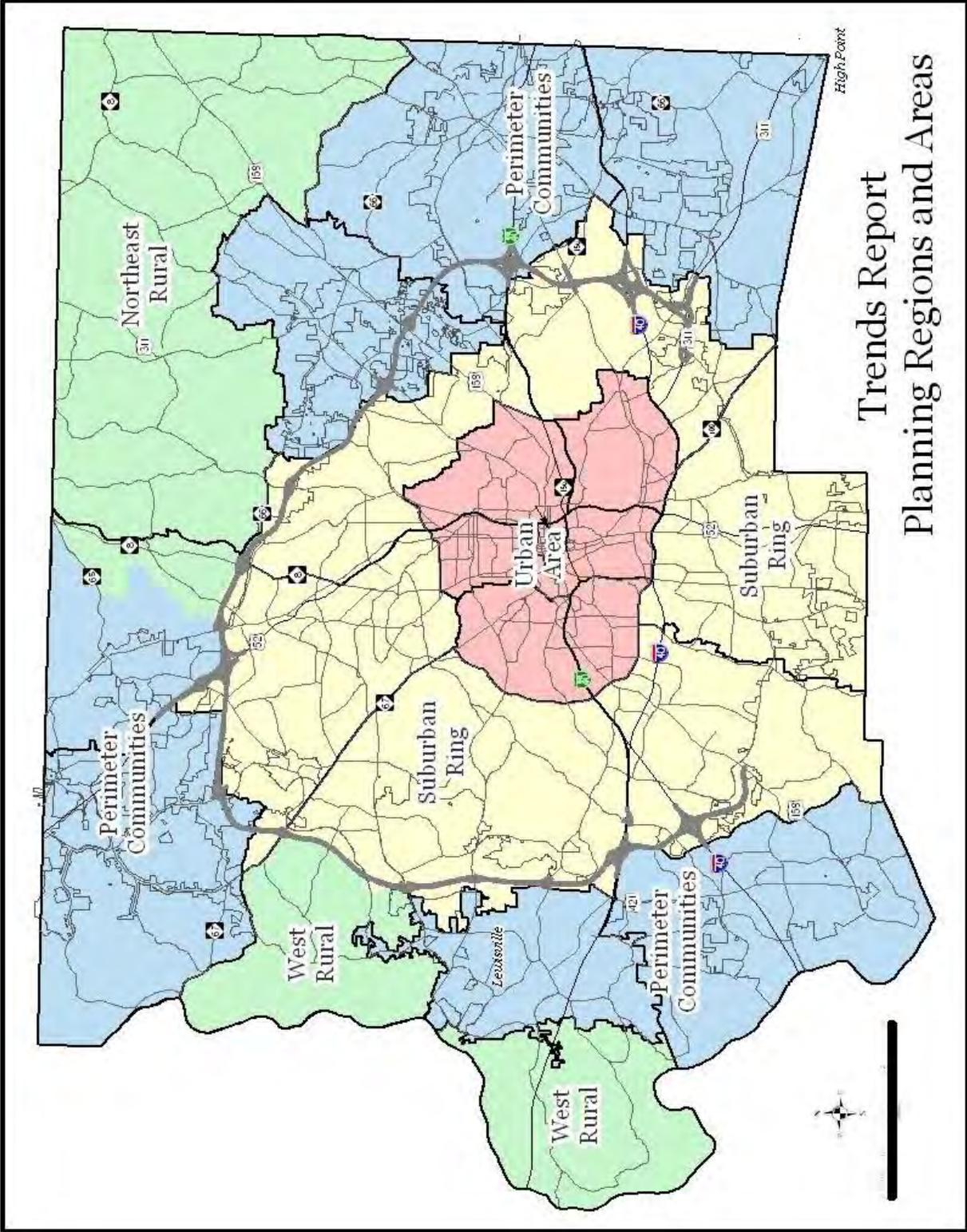


## Forsyth County Planning Regions and Areas

For this report, Forsyth County has been grouped into five geographic “**planning regions**” based on 22 various area plans, development guidelines, comprehensive plans and policy areas (*see map on page 9*):

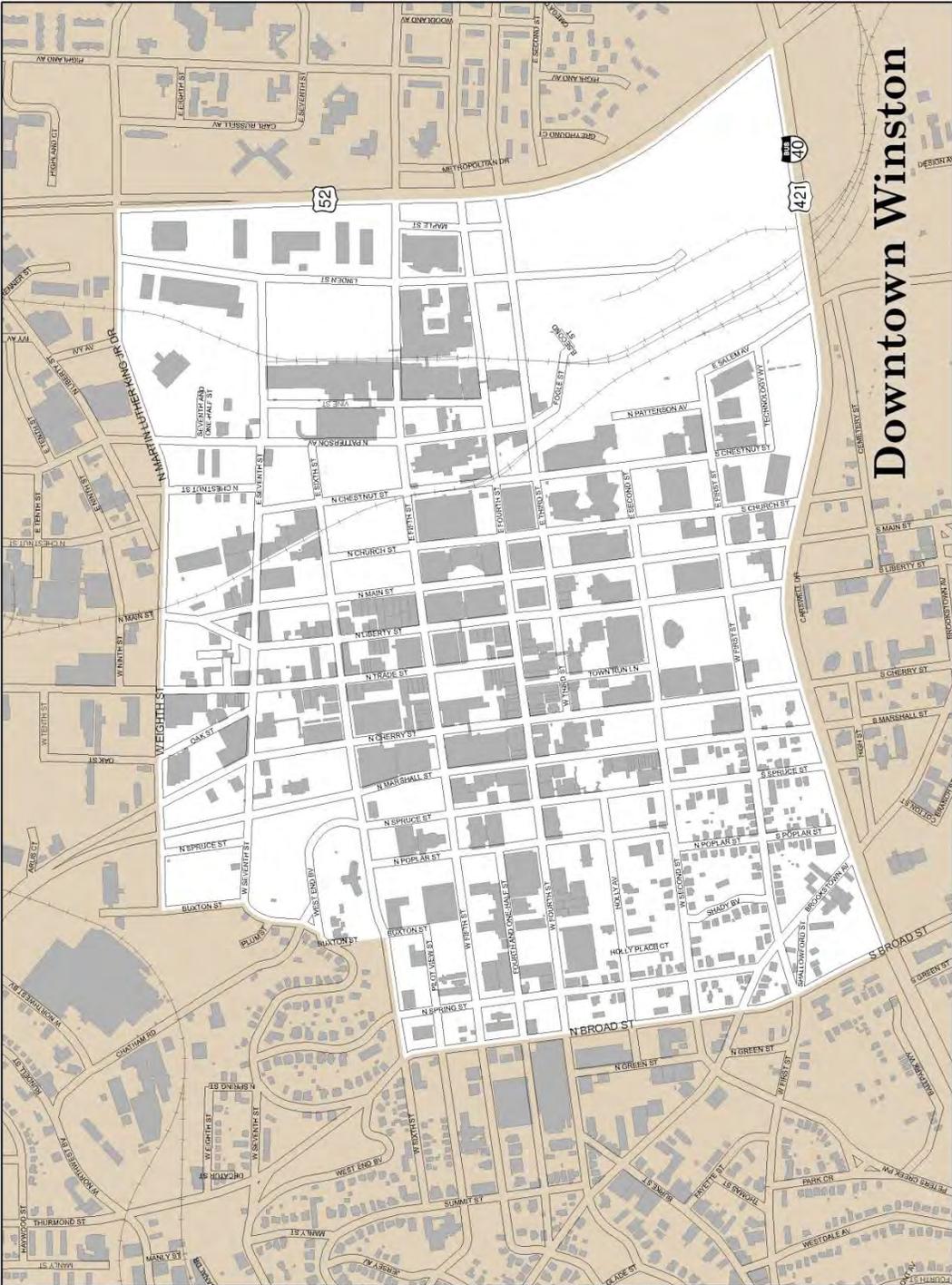
- **Downtown** Winston-Salem (400 Acres) is bordered by Business 40/U.S. 421 to the south, N. Broad Street to the west, Martin Luther King, Jr. Drive to the north and U.S. 52 to the east (*see map on page 10*).
- The **Urban Area** (29 square miles) is composed of the six urban area plan areas (East/Northeast, North Central, Northwest, South Central, Southeast and Southwest), and is bordered by Interstate 40 to the south, Silas Creek Parkway to the west, Reynolds Boulevard/Akron Drive to the north and Brushy Fork Creek/Reidsville Road/Salem Lake to the east.
- The **Suburban Ring** (130 square miles) includes the six suburban area plan areas (North, Northeast, South, Southeast, Southwest and West), and extends from the Urban Area to generally the Winston-Salem municipal limits (except in southeast Forsyth County).
- Seven **Perimeter Communities** (154 square miles) located in three groups: Clemmons and Lewisville to the west; Tobaccoville and Rural Hall to the north; and Walkertown, Kernersville and the unincorporated Southeast Forsyth County (Union Cross) area to the east. Clemmons, Kernersville and Lewisville plans are prepared by independent planning staffs working for their respective towns and villages.
- **Rural Areas** (99 square miles) located in west, northwest and northeast Forsyth County for which rural development assessments have been completed.

Forsyth County Planning Regions and Areas Map

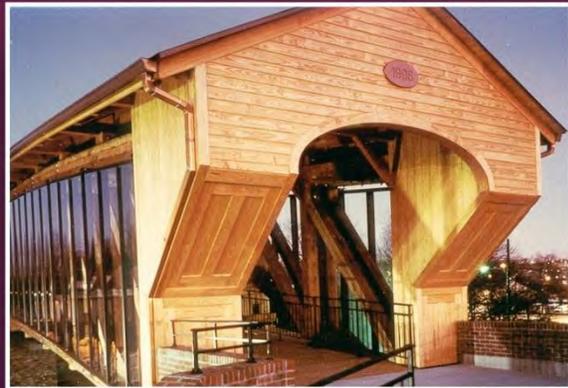


Trends Report  
Planning Regions and Areas

# Downtown Area Map



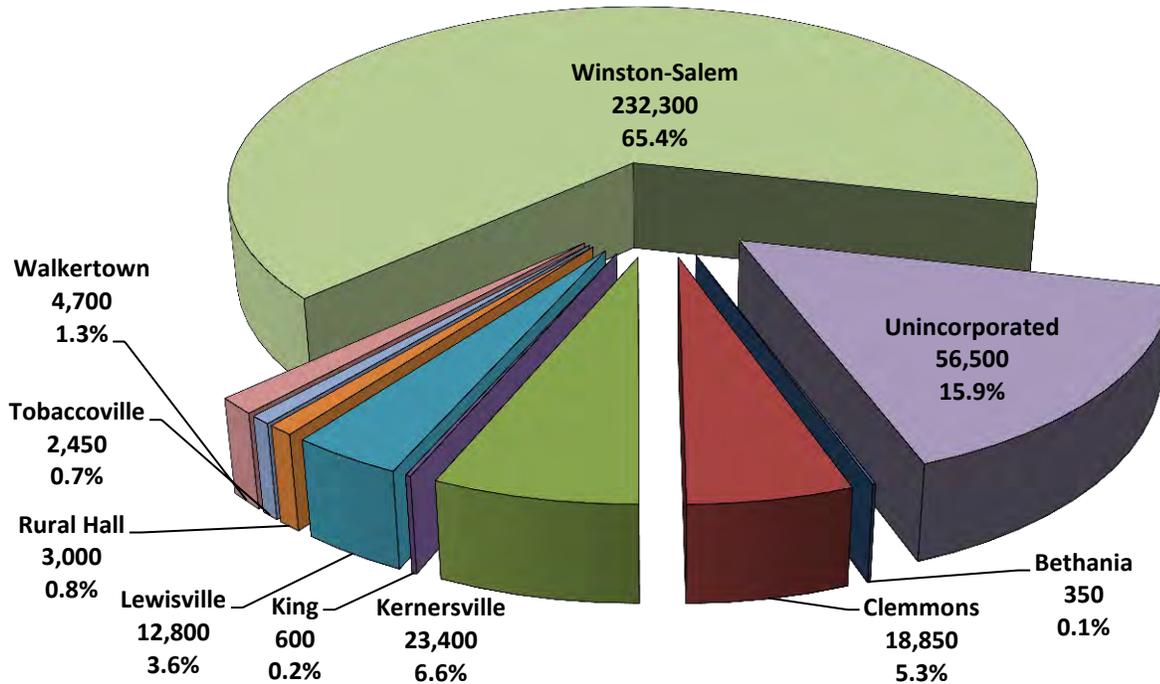
# Communities: Population and Tax Base



## Forsyth County Population by Community

### Forsyth County Community Population (2011)

Winston-Salem's proportionate population of the county increased from 64% to 65% since 2009. The proportionate population of the other communities combined also increased from 18% to 19% since 2009. The population living in unincorporated areas of Forsyth County decreased from 18% in 2009 to 16% in 2011.



Sources: United States Census Bureau; NC Office of State Budget and Management (OSBM), State Demographics Branch

### North Carolina Population Rankings for Forsyth County Municipalities (2007 and 2011)

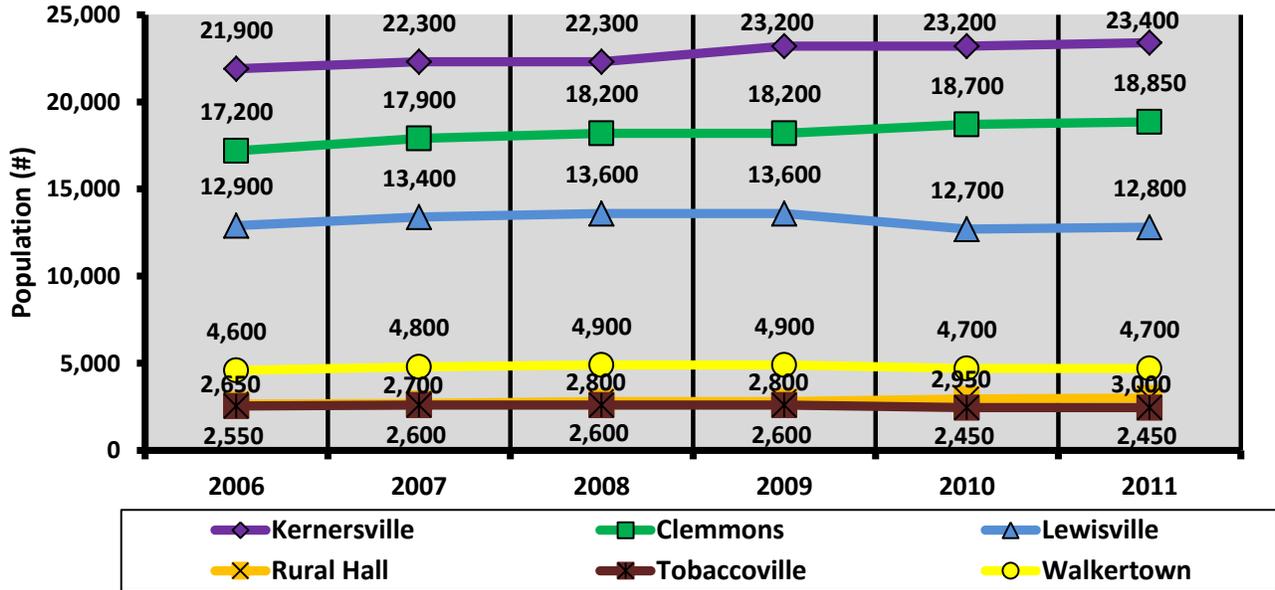
Winston-Salem's population maintains its fourth place ranking by the N.C. State Demographics Branch while the U.S. Census Bureau has Durham listed as the fourth most populous city. Among North Carolina's 550 municipalities, Forsyth County has three additional communities in the state's top 100 municipalities in 2009: Kernersville at #38, Clemmons at #46 and Lewisville at #69. Tobaccoville and Bethania dropped 15 and 14 places in the rankings, respectively, from #211 to #226 and from #455 to #469.

Community	2007 Population Rank	2011 Population Rank	Change
Winston-Salem	4	4	--
Kernersville	40	38	+2
Clemmons	48	46	+2
Lewisville	61	69	-8
Walkertown	129	136	-7
Rural Hall	209	205	+4
Tobaccoville	211	226	-15
Bethania	455	469	-14

NC Office of State Budget and Management (OSBM), State Demographics Branch

### Forsyth County Perimeter Community Population by Year (2006–2011)

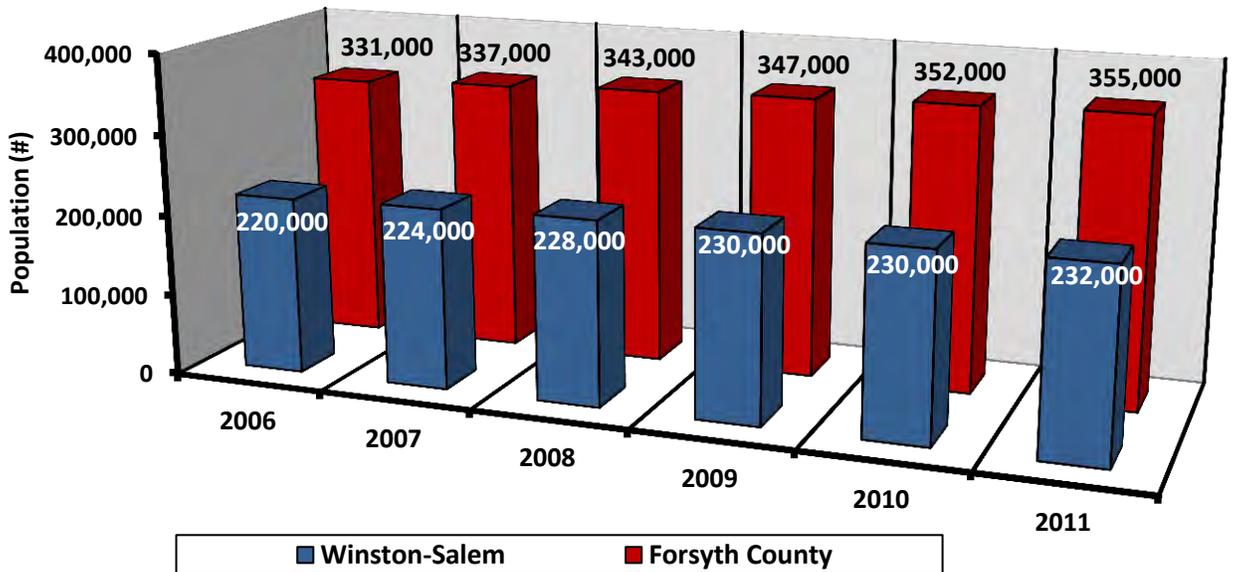
The Perimeter Communities are segregated into two groups with regard to population. Kernersville, Clemmons and Lewisville have populations greater than 10,000 while Walkertown, Rural Hall and Tobaccoville have populations less than 5,000. Communities with greater than 10,000 people changed in population between -100 and +1,650 over six years while communities with less than 5,000 people changed by -100 to +350 people over six years.



Source: NC Office of State Budget and Management (OSBM), State Demographics Branch

### Winston-Salem and Forsyth County Population by Year (2006-2011)

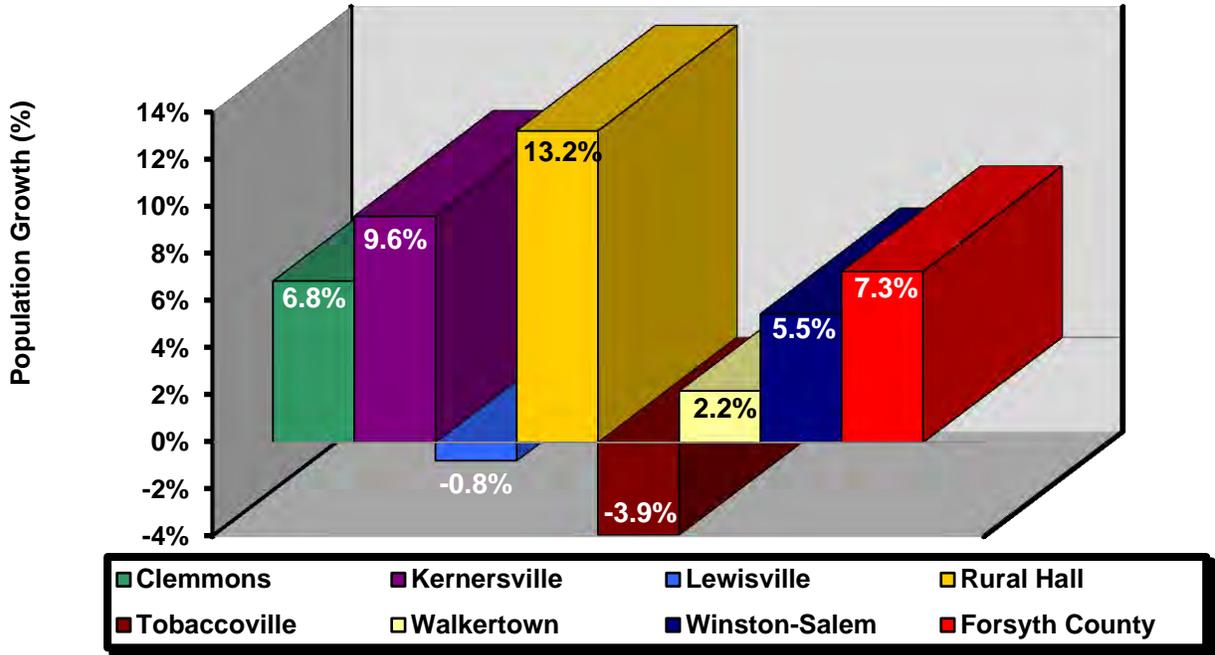
Between 2006 and 2011, Winston-Salem’s population grew from 220,000 to 232,000 while Forsyth County’s population grew from 331,000 to 355,000.



Source: United States Census Bureau

### Forsyth County Community Growth Rate (Years 2006–2011)

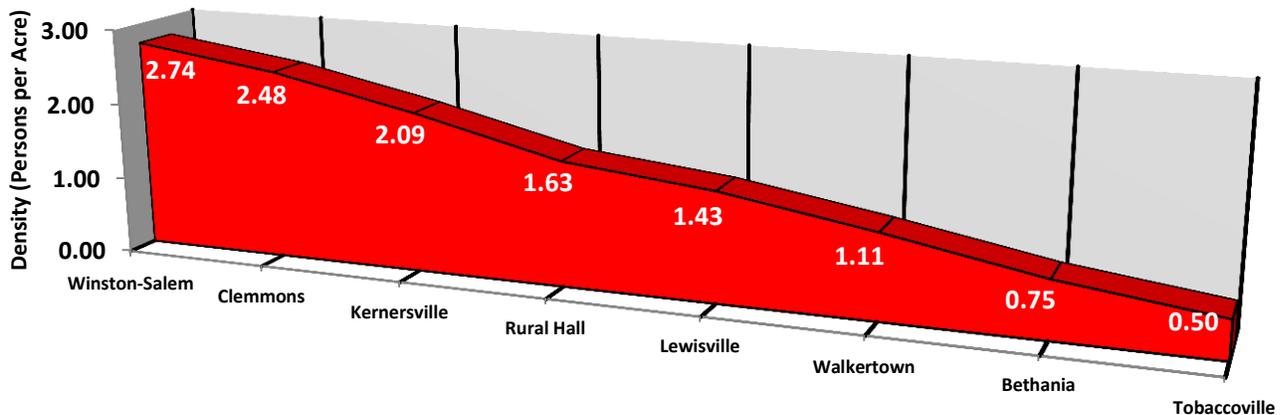
Between 2006 and 2011, communities had growth rates ranging from -0.8% for Lewisville to 13.2% for Rural Hall. Overall, Forsyth County increased in population by 7.3% between 2006 and 2011.



Source: United States Census Bureau

### Forsyth County Population Density by Community (2011)

All of the communities in Forsyth County increased in population density between 2007 and 2011, with the exception of Kernersville which annexed more than 1,000 acres of land in 2008. The greatest increase was in Clemmons which increased from 2.35 persons per acre in 2007 to 2.48 persons per acre in 2011. Winston-Salem has the highest density of population at 2.74 persons per acre. Overall, Forsyth County has a density of 1.34 persons per acre, up from 1.30 in 2007.

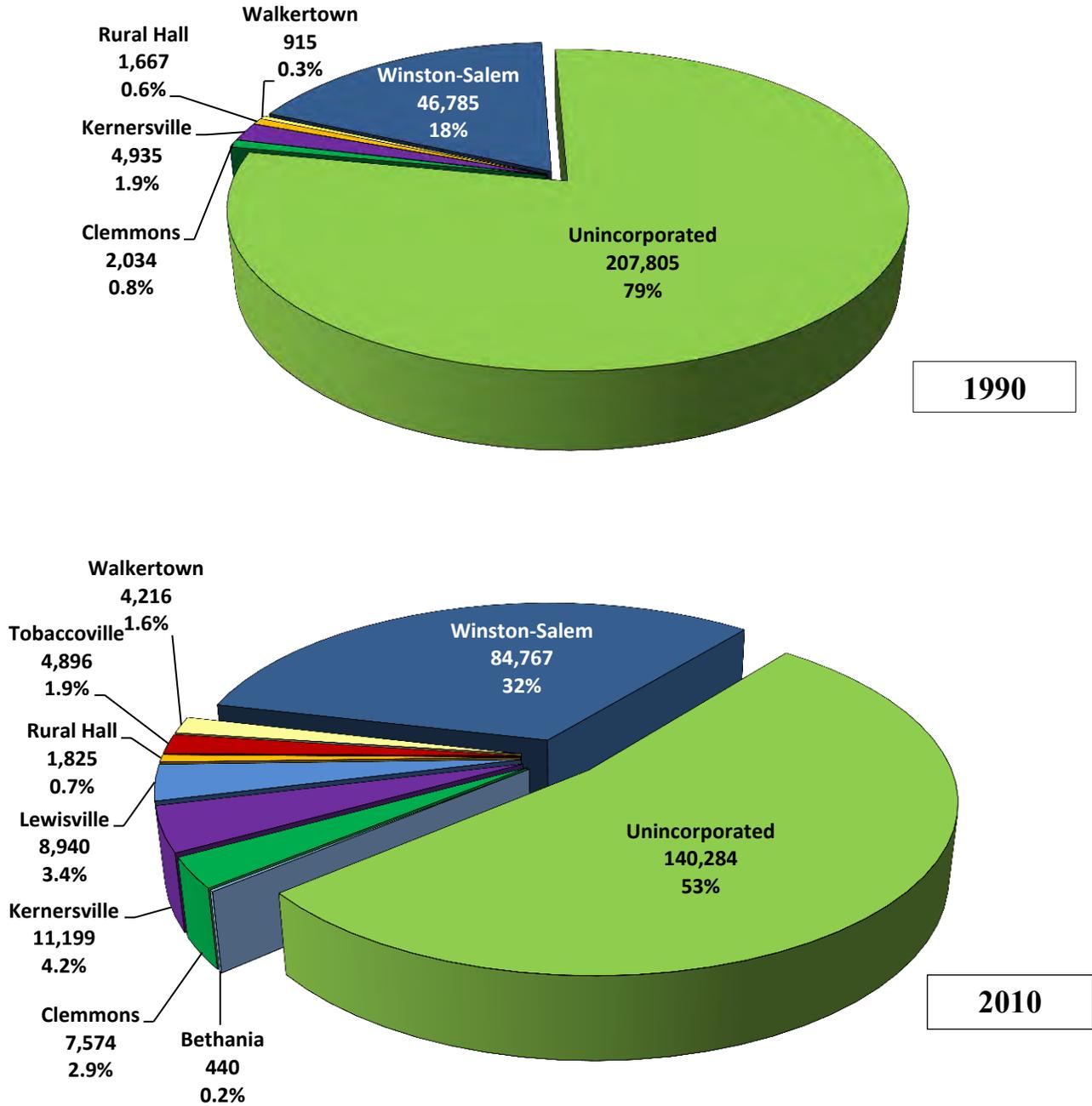


Source: NC Office of State Budget and Management (OSBM), State Demographics Branch

## 1990-2010 Forsyth County Land Area and Population Changes

### Forsyth County Community Land Areas

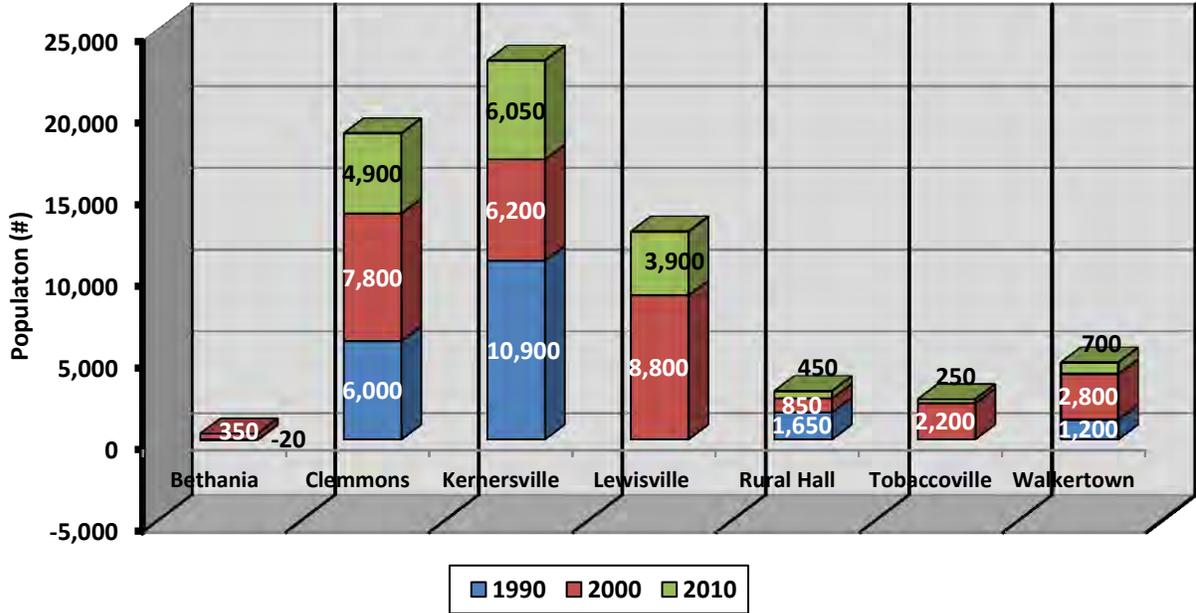
In 1990, nearly 80% (207,805 acres) of Forsyth County was unincorporated with Winston-Salem occupying less than 20% of the land area with 46,785 acres. None of the other four incorporated communities at that time (Kernersville, Clemmons, Rural Hall and Walkertown) occupied more than 2% of the county's land area. In 2010, 53% (140,284 acres) of Forsyth County remained unincorporated with the five municipalities existing in 1990, plus three new municipalities (Bethania, Lewisville and Tobacoville), growing by 120% (67,500 acres) in land area during those 20 years.



Source: NC Office of State Budget and Management (OSBM), State Demographics Branch

**Forsyth County Perimeter Community Populations by Decade (1990 to 2010)**

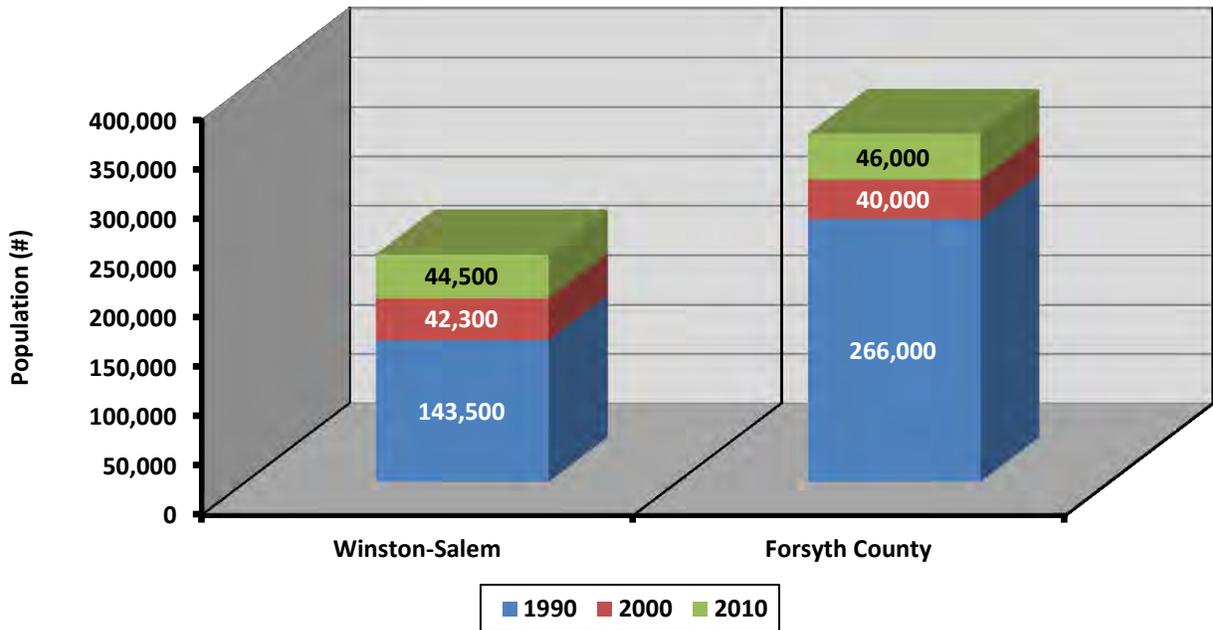
Clemmons, Kernersville and Walkertown more than doubled their populations between 1990 and 2010 increasing by 211%, 112% and 292%, respectively. Lewisville grew by 44% during its first 10 years of incorporation.



Source: United States Census Bureau

**Winston-Salem and Forsyth County Populations by Decade (1990 to 2010)**

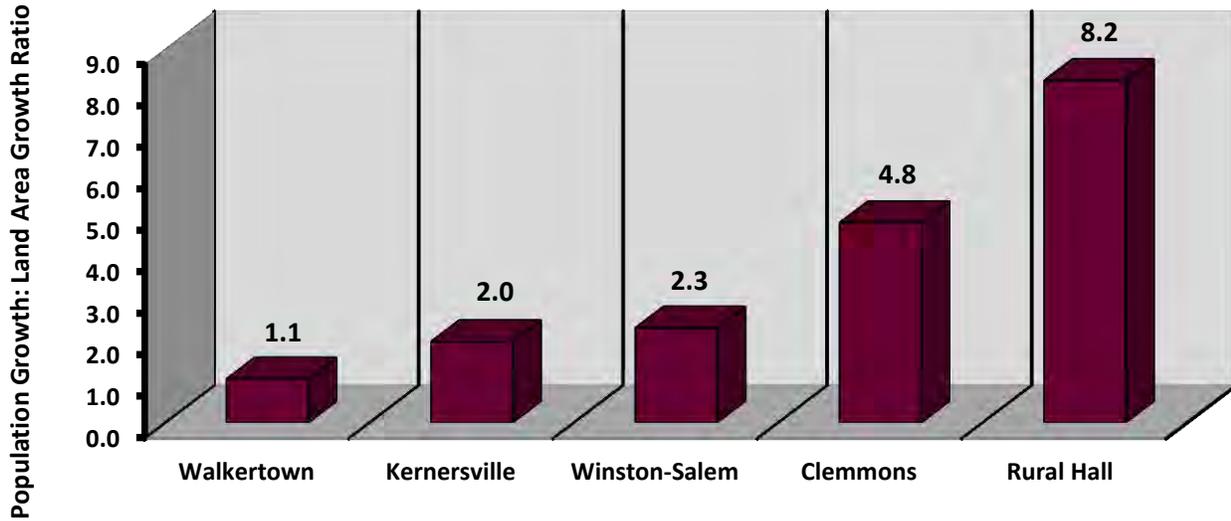
Winston-Salem grew by 42% between 1990 and 2010, from 143,500 to 230,300, while Forsyth County increased its population by 32% from 266,000 to 352,000.



Source: United States Census Bureau

**Forsyth County Community Population Growth: Land Area Growth Ratios (1990 – 2010)**

Using a ratio of population growth to municipal land growth gives an indirect measure of sprawl. A ratio close to 1 indicates more sprawled growth (i.e. an increase of 1 person per acre of land increase) while a higher number reflects more compact growth. Between 1990 and 2010, Rural Hall had the most compact growth at an 8:1 ratio (an increase of 8 people in population per acre of municipal land growth) while Walkertown had the least compact growth at an almost 1: 1 ratio.



Source: NC Office of State Budget and Management (OSBM), State Demographics Branch

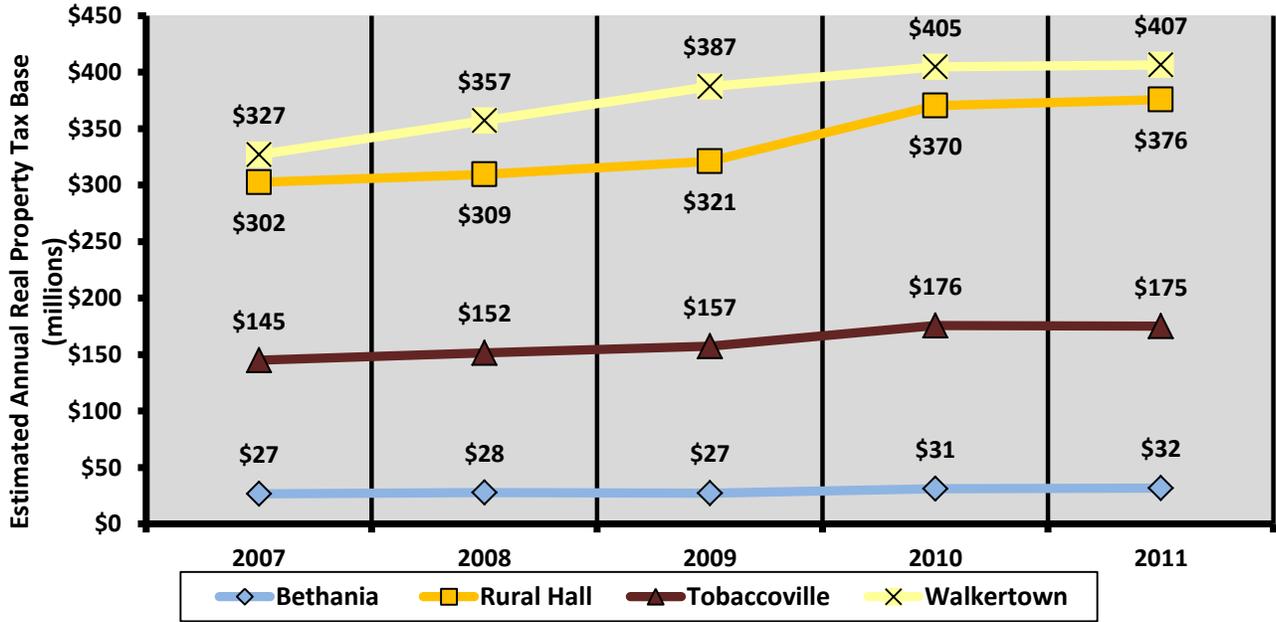
**Forsyth County Real Property Tax Base and Tax Base Growth by Community**

**Forsyth County’s Smaller Perimeter Communities Real Property Tax Base and Tax Base Growth by Year (2007–2011)**

Current tax bases for smaller Perimeter Communities in Forsyth County range from \$32 million for Bethania to more than \$400 million for Walkertown. Since 2007, most of the smaller Perimeter Communities had annual tax base growth between 2% and 9%. Rural Hall and Bethania had tax base reductions of 1% and 2% in 2007 and 2009, respectively.

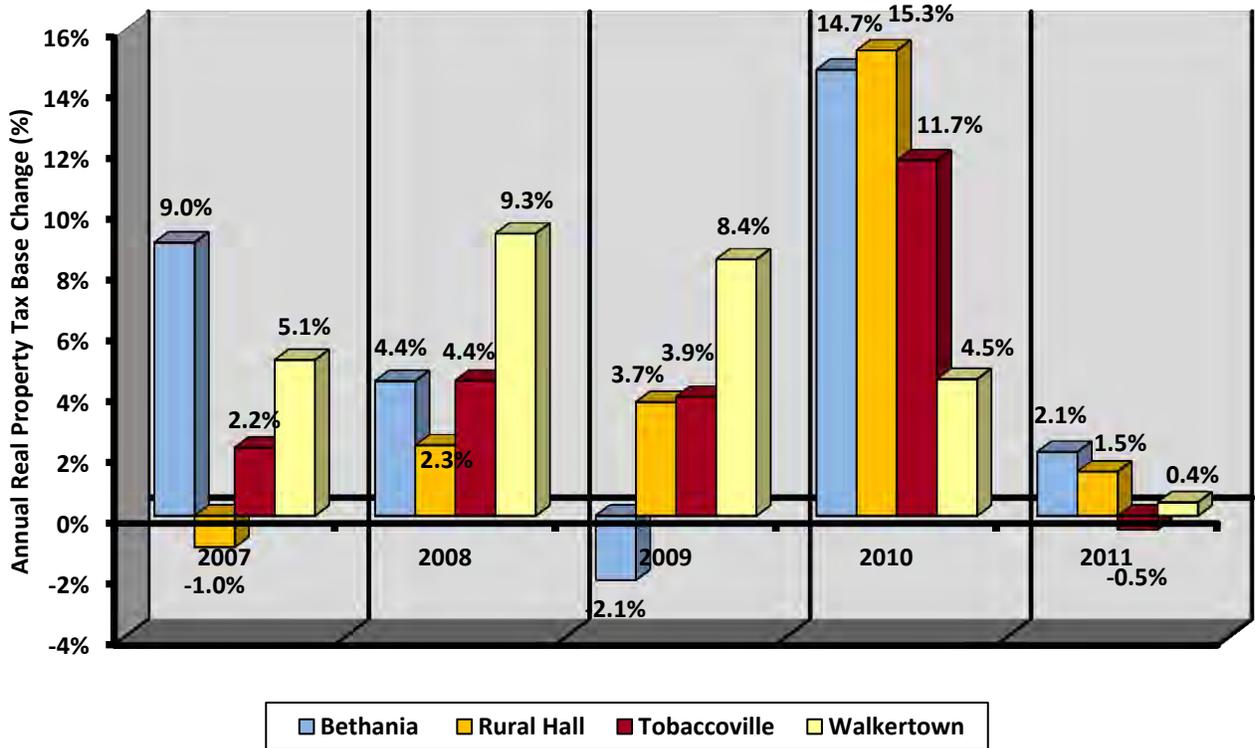
In 2010, all smaller Perimeter Communities had tax base growth ranging from 4.5% for Walkertown to 15.3% for Rural Hall, due to the countywide real property assessment re-evaluation. (see graph next page). Tax base growth declined sharply in 2011 with changes ranging from -0.5% in Tobaccoville to 2% in Bethania.

**Forsyth County's Smaller Perimeter Communities Real Property Tax Base by Year (2007–2011) (Continued)**



Source: North Carolina Department of State Treasurer

**Forsyth County's Smaller Perimeter Communities Real Property Tax Base Growth by Year (2007–2011)**



Source: North Carolina Department of State Treasurer

### Forsyth County's Larger Perimeter Communities Real Property Tax Base and Tax Base Growth by Year (2007–2011)

Tax bases for the three larger Perimeter Communities are \$1.2 billion for Lewisville, \$1.9 billion for Clemmons, and \$2.5 billion for Kernersville. Since 2007, most of the larger Perimeter Communities had annual tax base growth between 2 % and 6 %.

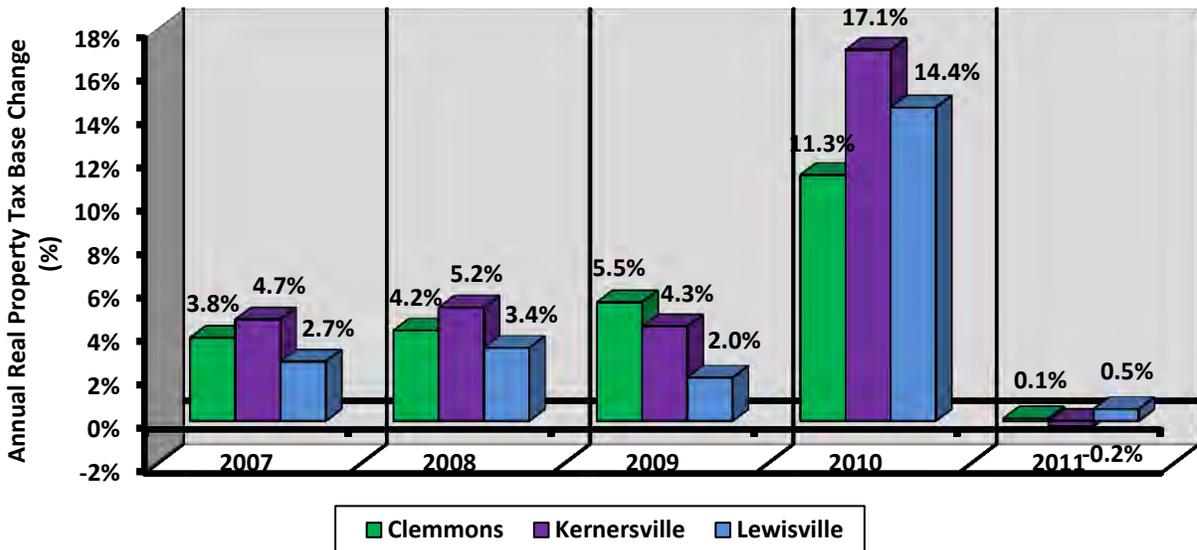
In 2010, all larger Perimeter Communities had tax base growth ranging from 11.3% for Clemmons to 17.1% for Kernersville, due to the countywide real property assessment re-evaluation (*see graph next page*). Tax base growth declined sharply in 2011 with changes ranging from -0.2% in Kernersville to 0.5% in Lewisville.

### Forsyth County's Larger Perimeter Communities Real Property Tax Base by Year (2007–2011)



Source: North Carolina Department of State Treasurer

### Forsyth County's Larger Perimeter Communities Real Property Tax Base Growth by Year (2007–2011)



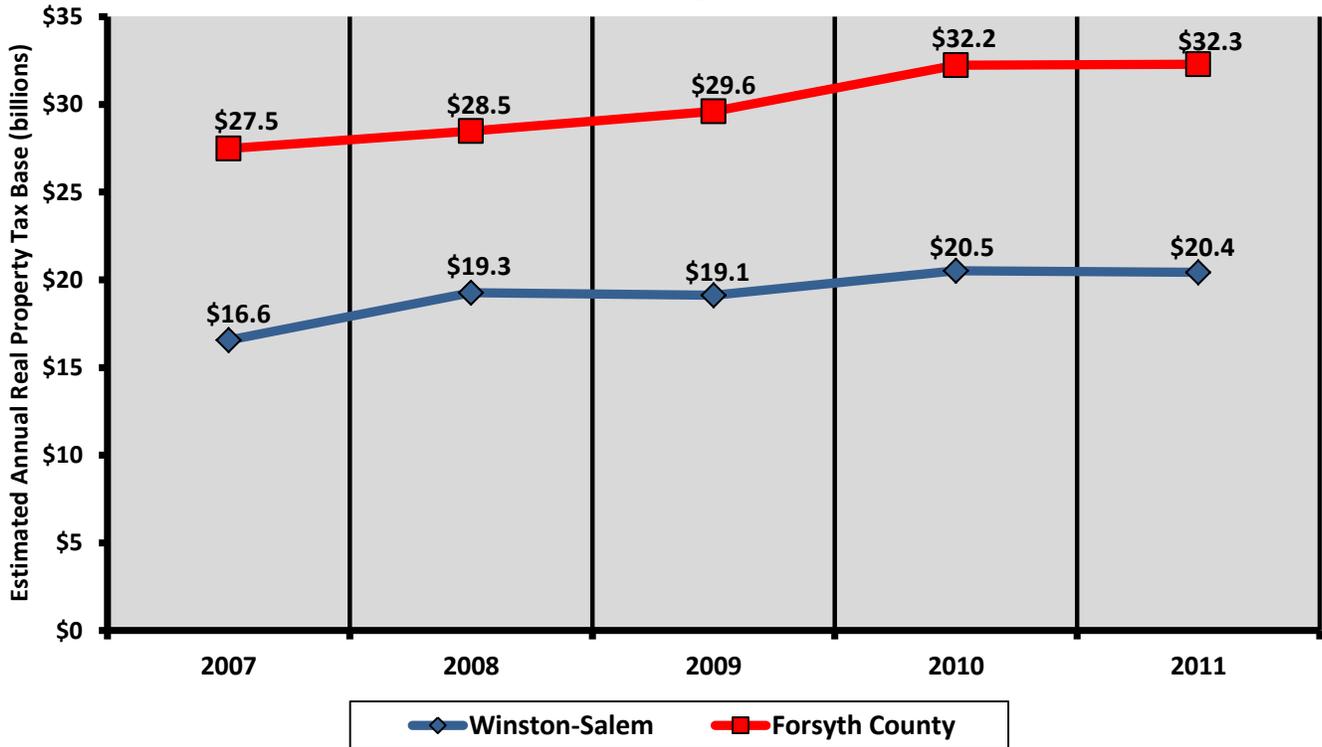
Source: North Carolina Department of State Treasurer

**Winston-Salem and Forsyth County Real Property Tax Base and Tax Base Growth by Year (2007–2011)**

Winston-Salem and Forsyth County have had mostly steady tax base increases between 2007 and 2011 with Winston-Salem’s tax base increasing by an average of 4.6 % per year (from \$16.6 billion to \$20.4 billion). Forsyth County’s tax base has increased by an average of 3.5% per year (from \$27.5 billion to \$32.3 billion).

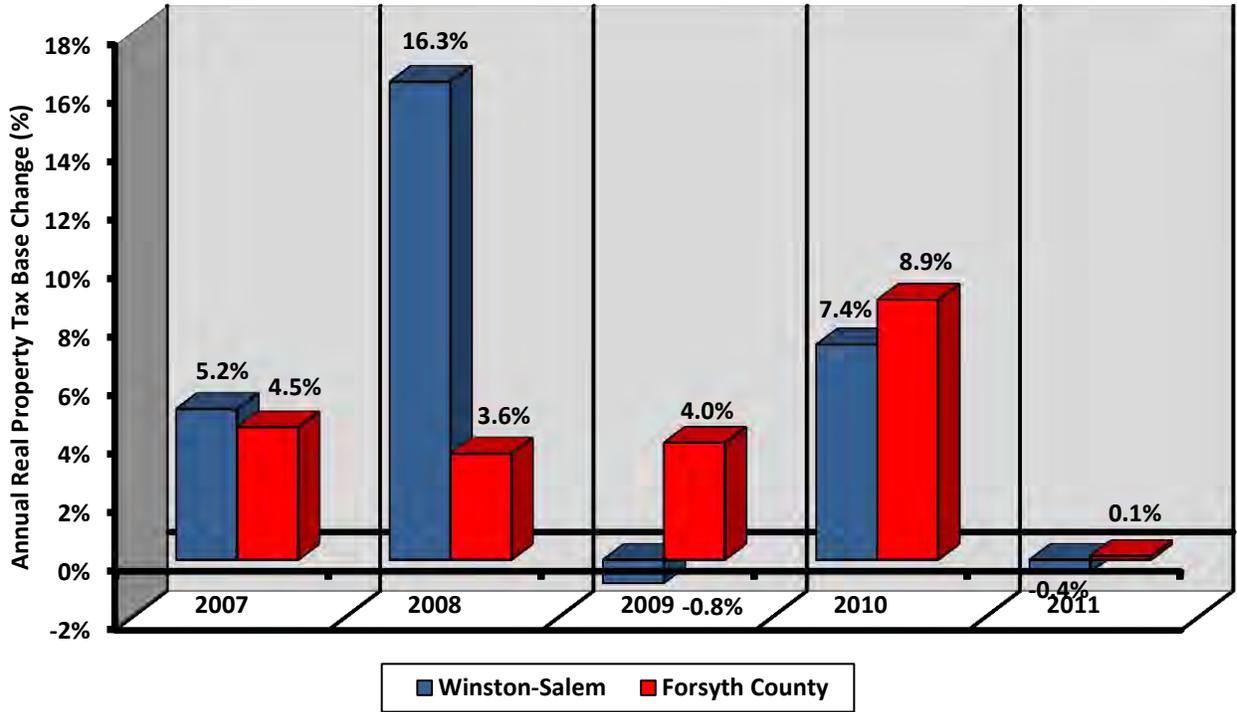
Winston-Salem had a major spike in tax base growth in 2008, of 16%, that reflected its major annexations in 2006. The greatest tax base growth for both Forsyth County and Winston-Salem of increase of 9% and 7%, respectively, occurred in 2010 with the countywide real property assessment re-evaluation.

**Winston-Salem and Forsyth County Real Property Tax Base by Year (2007–2011)**



*Source: North Carolina Department of State Treasurer*

### Winston-Salem and Forsyth County Real Property Tax Base Growth by Year (2007–2011)



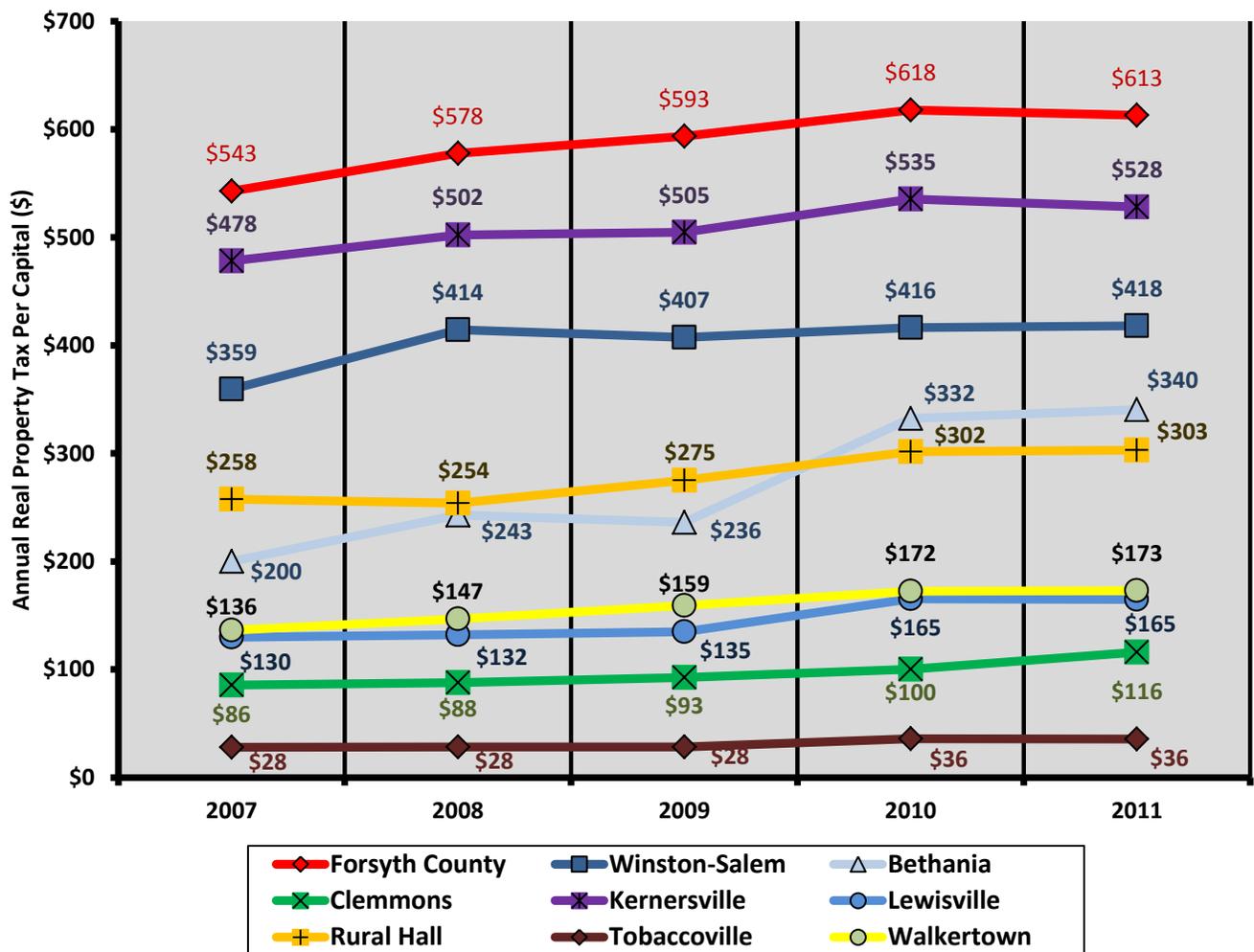
Source: North Carolina Department of State Treasurer

### Forsyth County Community Real Property Tax per Capita by Year (2007–2011)

Comparison of taxes per capita for Forsyth County and its eight incorporated communities show interesting results. The smaller Perimeter Communities (Bethania, Rural Hall, Tobaccoville and Walkertown) have annual property taxes ranging from \$36 per person in Tobaccoville to a somewhat surprising \$332 per person in Bethania. The larger Perimeter Communities (Clemmons, Kernersville and Lewisville) have annual property taxes ranging from \$100 per person in Clemmons to \$535 per person in Kernersville.

Winston-Salem and Forsyth County have annual property taxes per person of \$416 and \$618, respectively. The higher property taxes per person in Kernersville, Winston-Salem and Forsyth County are typically due to more local government services being provided to their residents than the other communities in the county.

### Forsyth County Community Real Property Tax per Capita by Year (2007–2011)



Source: North Carolina Department of State Treasurer

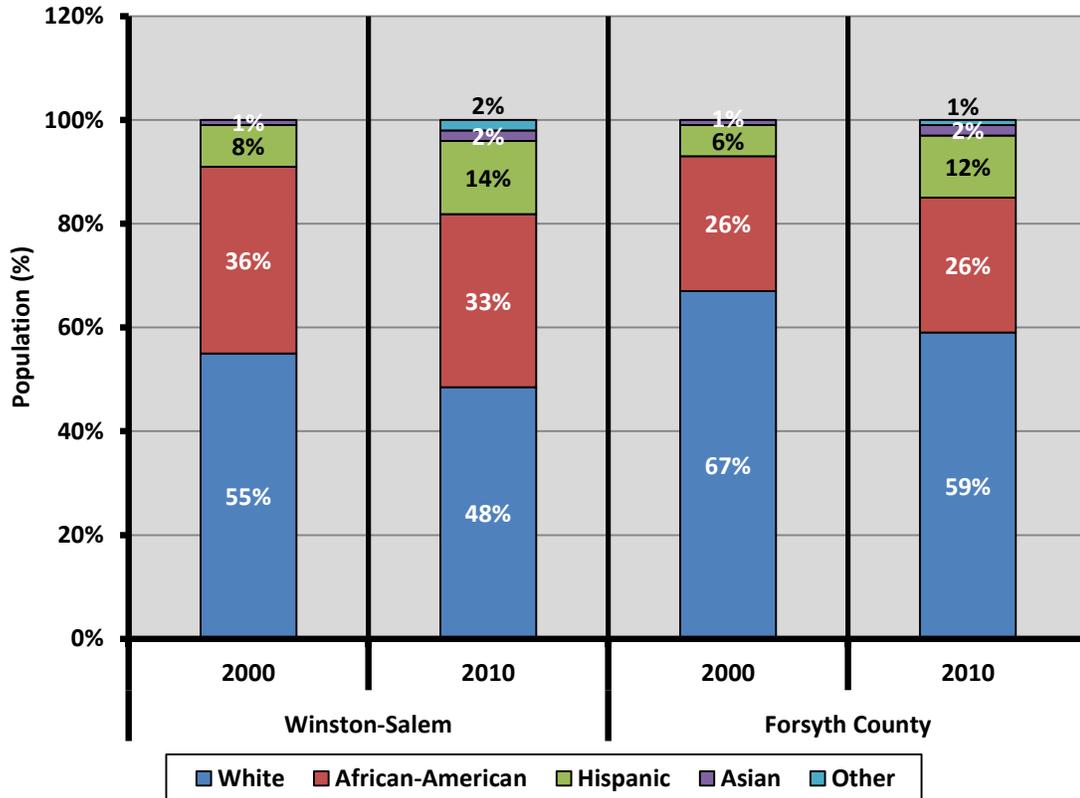
# Diversity



## Race

### Population Diversity for Winston-Salem and Forsyth County (2000 and 2010)

Between 2000 and 2010, the proportion of the African-American population of Winston-Salem decreased from 36% to 33% while the Hispanic population increased from 8% to 14%. Hispanics also increased their percentage of Forsyth County's population from 6% to 12%.

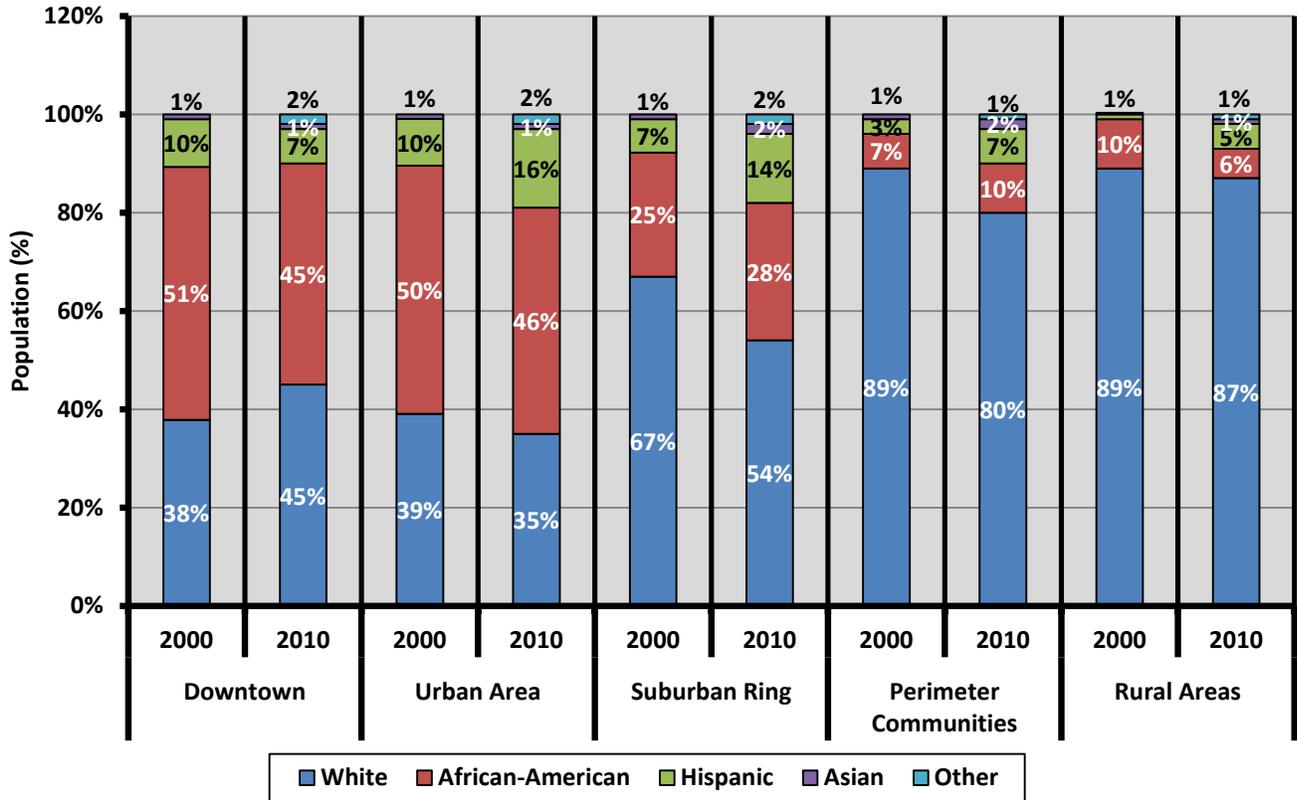


*Source: United States Census Bureau*

### Population Diversity by Planning Regions (2000 and 2010)

All planning regions in Forsyth County have become more racially diverse in 2010 than they were in 2000. Downtown and the Urban Area are more diverse than the remainder of Forsyth County. The White population within the Downtown and the Urban Area is around 40%, increasing to 67% in the Suburban Ring, and reaching a plateau of 87% in the Rural Areas. Likewise, African-Americans comprise 46% of the Urban Area population, decreasing to 28% in the Suburban Ring, reaching a low of 6% in Rural Areas. The proportion of people of Hispanic descent is highest in the Urban Area at 16%, decreasing at a steady rate in the outlying areas to 5% in Rural Areas. The Asian population remains fairly constant at 1% to 2% throughout Forsyth County.

### Population Diversity by Planning Regions (2000 and 2010) (Continued)



Source: United States Census Bureau

## Age and Gender

### Age and Gender Composition by Planning Regions (2000 and 2010)

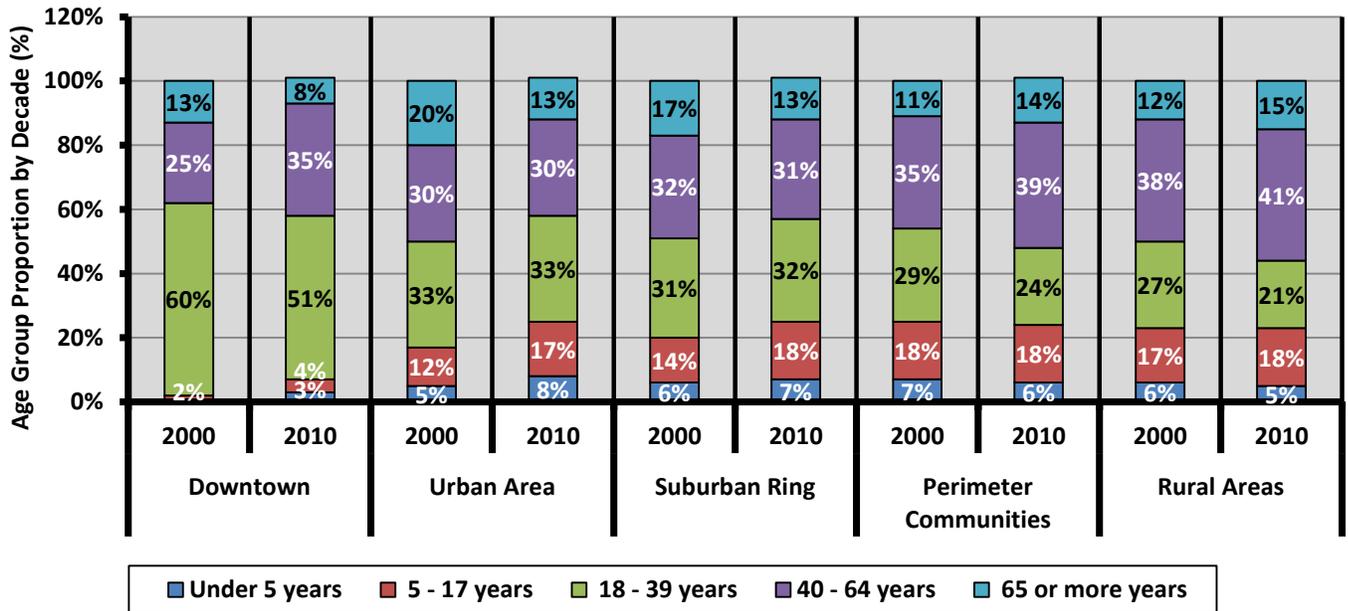
The age breakdown in Forsyth County confirms that the Downtown and Urban Area are comprised of a larger proportion of young adults than in the Perimeter Communities and Rural Areas: 51% and 33% versus 24% and 21% for 18 to 39 year olds. Conversely, adults aged 40 to 64 are more likely to be located in Perimeter Communities and Rural Areas than in the Urban Area: 39% and 41% versus 33%.

There has been an increase in the number of children aged 5 to 17 in the Urban Area from 12% in 2000 to 17% in 2010, comparable to the other planning regions in the county. Likewise, the number of seniors (aged 65 and older) decreased from 20% in 2000 to 13% in 2010, comparable to the other planning regions.

The proportion of children under the age of 5 remains fairly constant throughout the county at 5% to 7% of the general population.

There are more females than males in all planning regions, except for Downtown, with a countywide ratio of 53% female to 47% male.

**Age and Gender Composition by Planning Regions (2000 and 2010) (Continued)**



Source: United States Census Bureau

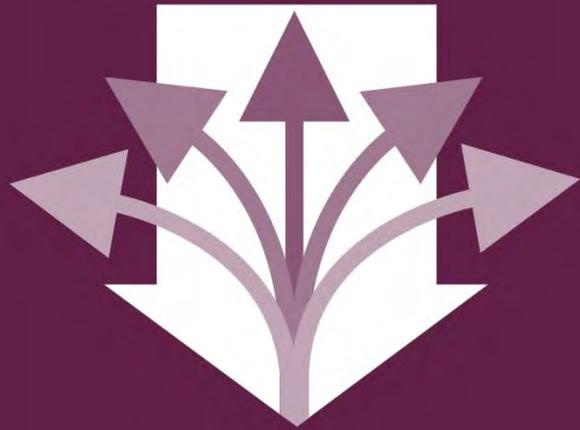
**Age and Gender Composition for Winston-Salem and Forsyth County (2000 and 2010)**

The biggest age group change for both Winston-Salem and Forsyth County is that 18 to 39 year olds have decreased between 2000 and 2010 (from 35% to 33% in the city and from 33% to 29% in the county) while 40 to 64 year olds have increased (from 28% to 30% in the city and from 31% to 33% in the county). The 5 to 17 year olds age group increased from 17% to 18% in both the city and the county between 2000 and 2010 while the under 5 age group has remained constant at 7% in both years. The 65 or older age group decreased in Winston-Salem from 14% in 2000 to 12% in 2010 while it remained constant at 13% in Forsyth County.



Source: United States Census Bureau

# Nonresidential Development Patterns



## 2006-2011 City-County Planning Board Approved Nonresidential Development

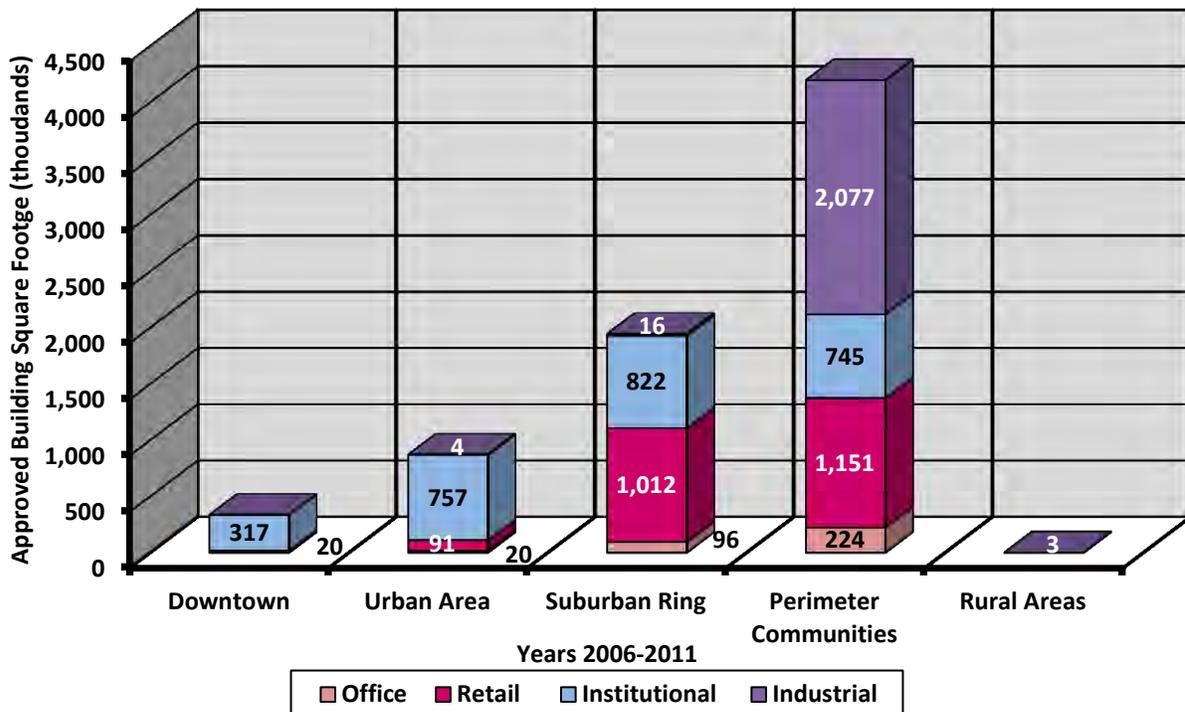
This section includes an analysis of nonresidential development (i.e. office, retail, institutional and industrial zoning proposals) approved by the City-County Planning Board between 2006 and 2011. It also includes nonresidential construction permit data from the City-County Inspections Division between 2006 and 2011.

### Approved Nonresidential Developments by Square Footage for Planning Regions (Years 2006–2011)

A review of approved zoning docket site plans between 2006 and 2011 shows that 1.2 million square feet of retail space was approved in the Perimeter Communities in 36 developments followed by 1.0 million square feet in the Suburban Ring and 91,000 square feet in the Urban Area.

Institutional uses accounted for the highest amount of approved space in Winston-Salem’s Downtown and the Urban Area at 1.1 million square feet combined. In Winston-Salem’s Suburban Ring, 822,000 square feet of institutional space was approved, while 745,000 square feet was approved in Forsyth County’s Perimeter Communities.

Approved industrial space in the Perimeter Communities area totals 2.1 million square feet. Most of that space is accounted for by the Caterpillar manufacturing facility of 900,000 square feet in Winston-Salem in southeast Forsyth County. Only 23,000 square feet of industrial space was approved for the remainder of the county. Office space square footage was most prevalent in the Perimeter Communities at 224,000 square feet, followed by the Suburban Ring at 96,000 square feet and 40,000 square feet in Downtown and the Urban Area combined.

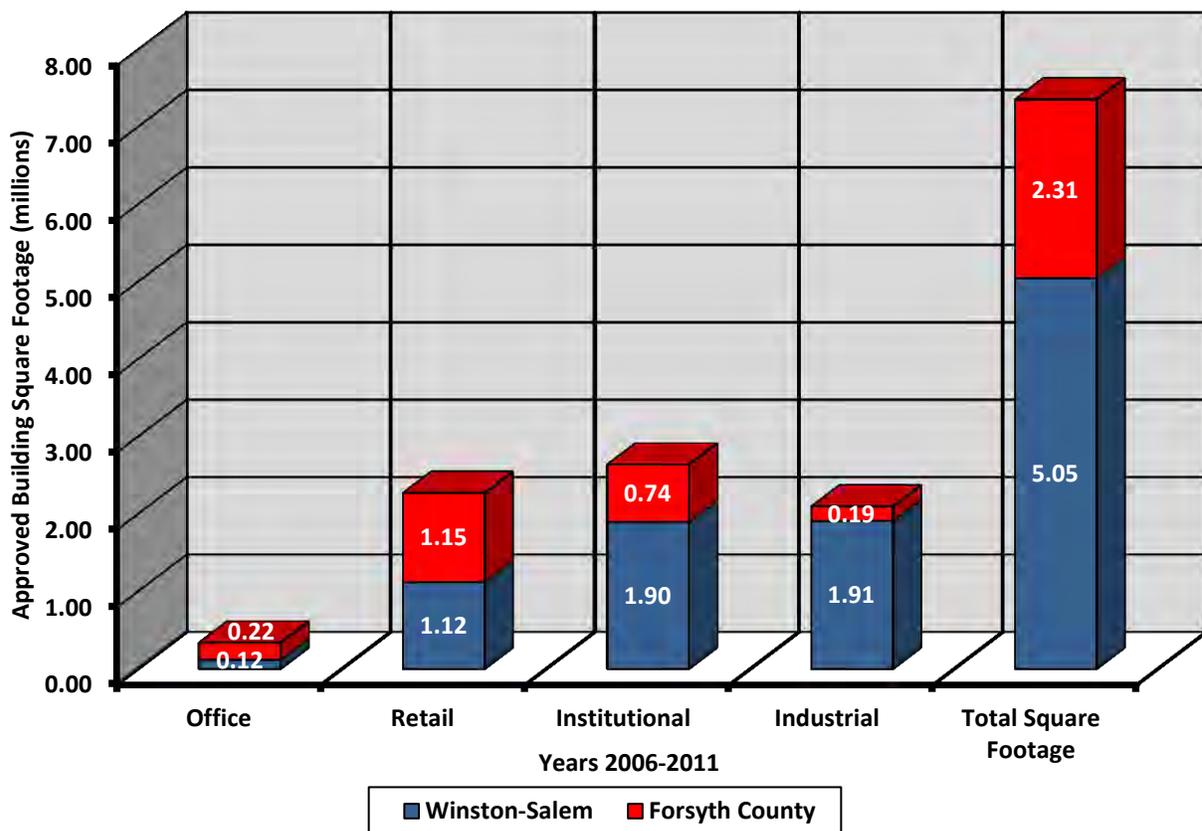


Source: City-County Planning Department

**Approved Nonresidential Square Footage by Land Use Type for Winston-Salem and Forsyth County (Years 2006–2011)**

Winston-Salem accounts for nearly 70% of the county’s nonresidential square footage approvals between 2006 and 2011. However, Winston-Salem Retail square footage approval of 1.12 million square feet accounts for less than one-half of Forsyth County’s 2.27 million retail square feet. Winston-Salem’s industrial square footage approvals accounts for 91% of all industrial square footage approved in Forsyth County from 2006 to 2011 (1.91 million out of 2.1 million).

Institutional use was the land use category which had the largest amount of county site plan approvals at 2.6 million square feet from 2006 to 2011. While institutional uses (e.g. churches, schools, hospitals) provide needed employment and services to Winston-Salem and Forsyth County, most institutional uses provide no property tax revenues to local governments due to their tax-exempt status.



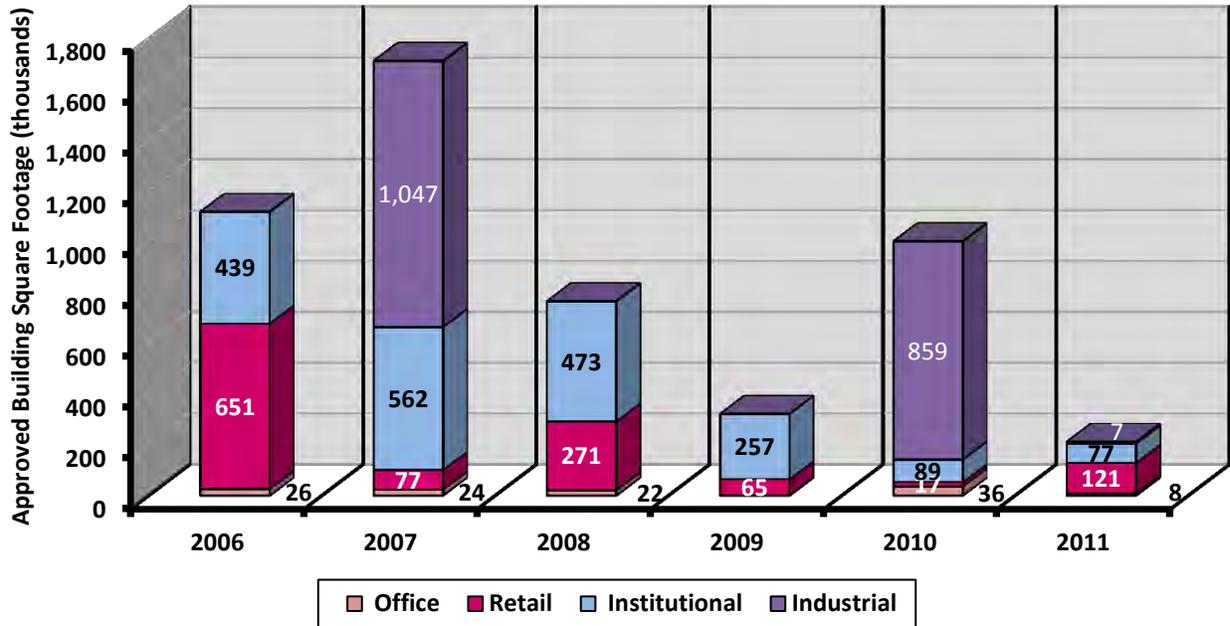
Source: City-County Planning Department

**Approved Nonresidential Square Footage for Winston-Salem and Forsyth County by Land Use Type by Year (2006–2011)**

For Winston-Salem, nonresidential approvals by the City-County Planning Board were at their peak in 2007 (see first graph next page) with 1.7 million square feet. These totals dropped by 55% between 2007 and 2008 to 766,000 square feet and dropped another 58% between 2008 and 2009 to 322,000 square feet. Nonresidential approvals rebounded somewhat totaling 1.0 million in 2010 but fell again to only 213,000 square feet in 2011.

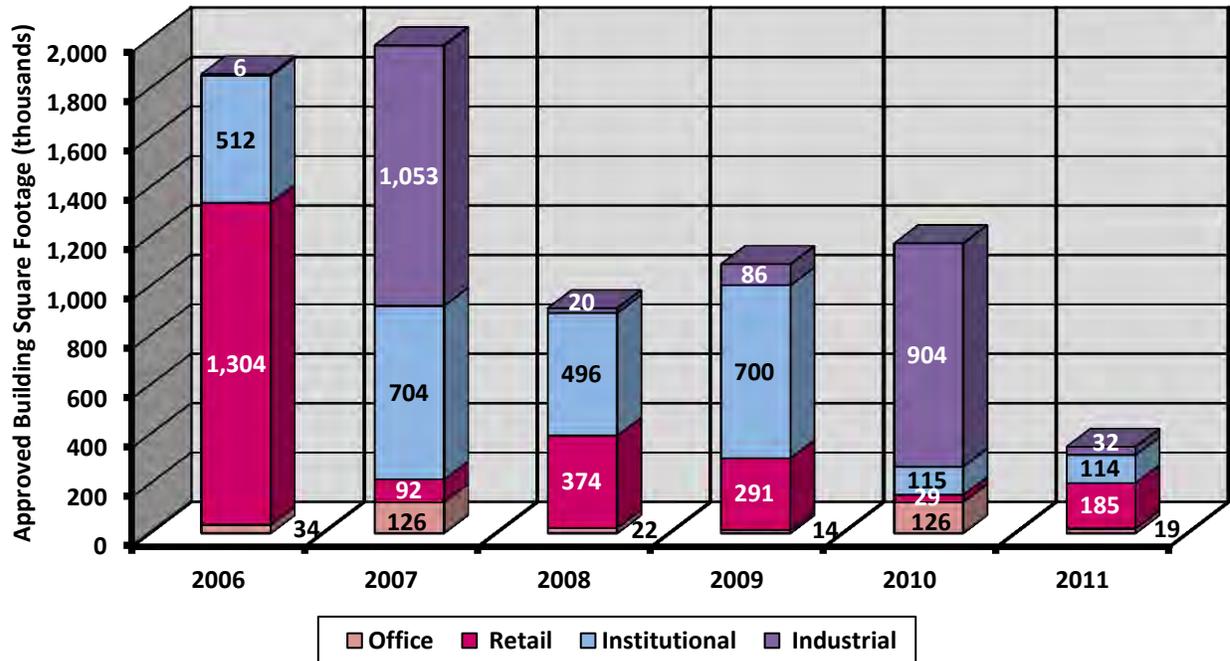
For Forsyth County, the peak years of nonresidential square footage approvals by the City-County Planning Board were 2006 and 2007. Nonresidential square footage for these

## Winston-Salem



*Source: City-County Planning Department*

## Forsyth County (including Winston-Salem)

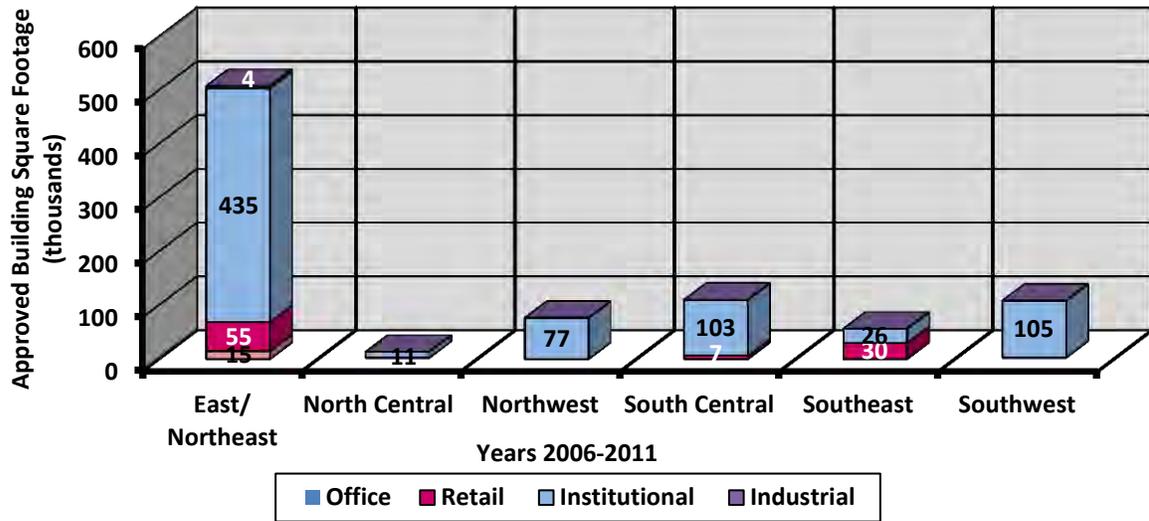


*Source: City-County Planning Department*

years were 1.9 million in 2006 and 2.0 million in 2007. Like Winston-Salem, these totals dropped by 54% to 912,000 in 2008, but increased slightly in 2009 and 2010 to 1.1 million square feet. However, 60% of the nonresidential approvals in 2008 and 2009 were institutional in nature, reflecting new additions to Winston-Salem/Forsyth County school facilities. In 2011, nonresidential approvals dropped by 235% to 350,000 square feet.

### Winston-Salem's Urban Area Approved Nonresidential Square Footage by Individual Planning Areas (Years 2006–2011)

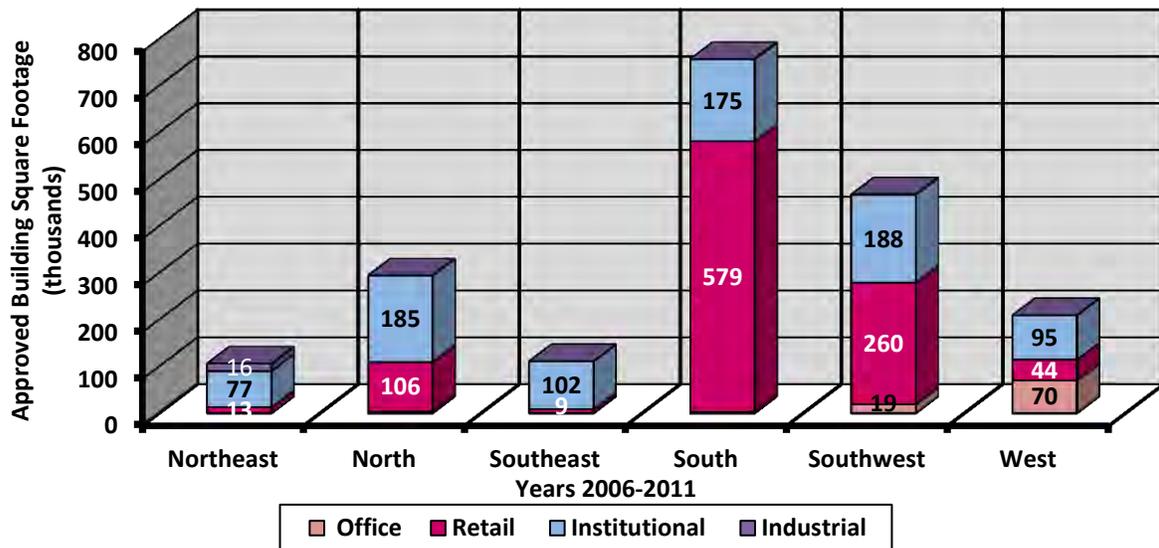
For Winston-Salem's Urban Area, institutional uses dominated requests approved by the Planning Board between 2006 and 2011. Approved institutional square footage totaled 757,000 with the East/Northeast Planning Area having the largest volume of approvals at 435,000 square feet.



Source: City-County Planning Department

### Winston-Salem's Suburban Ring Approved Nonresidential Square Footage by Individual Planning Areas (Years 2006–2011)

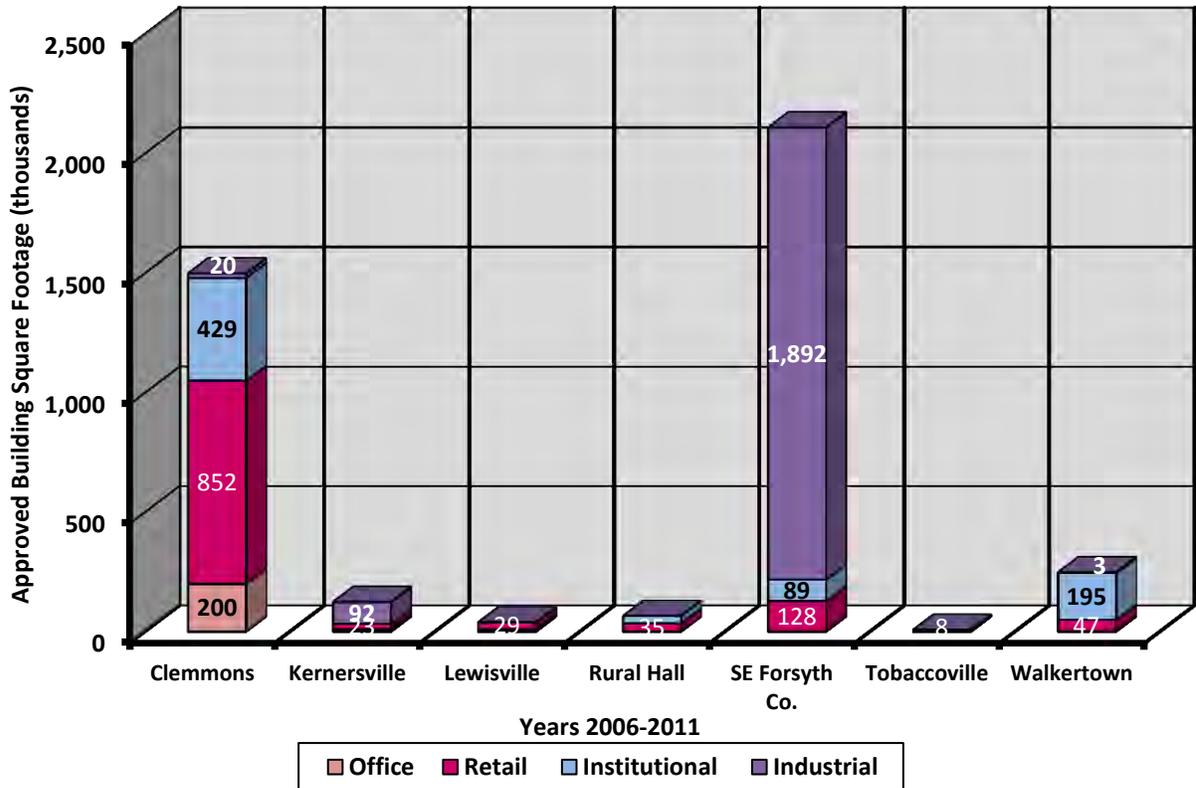
For Winston-Salem's Suburban Ring, retail uses were the most prevalent type of approvals allowed by the Planning Board between 2006 and 2011, followed closely by institutional approvals. Approved retail square footage totaled 1.1 million square feet with the South Suburban and Southwest Suburban Planning Areas having the largest quantity of approvals at 579,000 and 260,000 square feet, respectively, while institutional totals of 75,000 square feet or greater have occurred in all six Suburban Ring planning areas.



Source: City-County Planning Department

### Forsyth County's Perimeter Communities Approved Nonresidential Square Footage (Years 2006– 2011)

In Forsyth County's Perimeter Communities, industrial and retail uses were the largest requests in square feet approved by the Planning Board between 2006 and 2011. Approved industrial square footage totaled 2.0 million square feet with Southeast Forsyth County having the largest amount of approvals at 1.9 million square feet. That square footage included the Dell and Caterpillar developments along Union Cross Road. Approved retail square footage was highest in Clemmons at 852,000, reflecting the Village Point development approved in 2006.



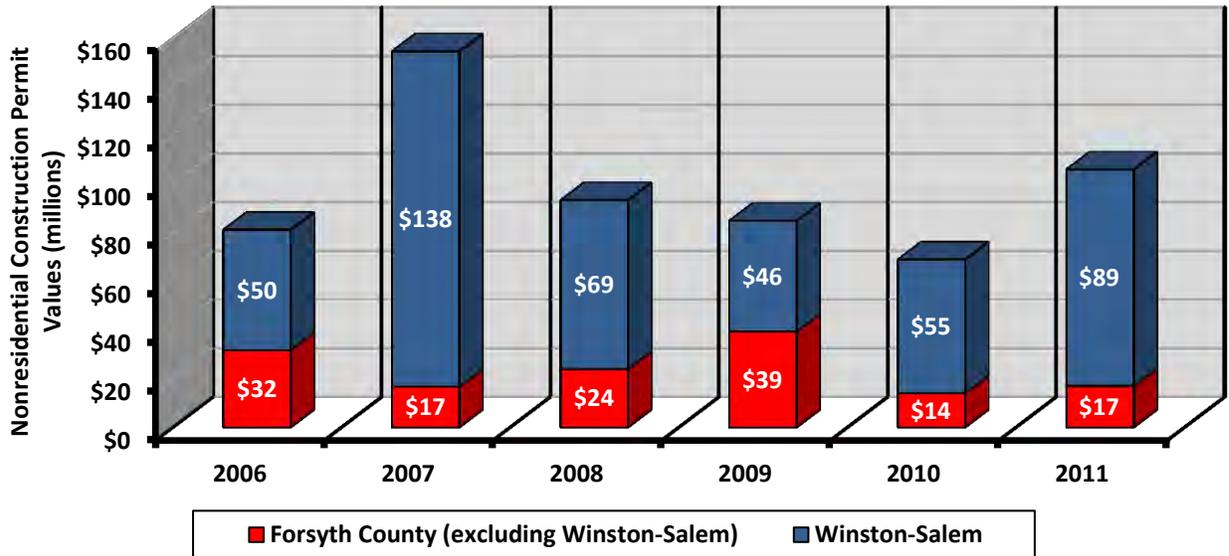
Source: City-County Planning Department

### 2006–2011 Forsyth County Nonresidential Construction Permit Trends

#### Winston-Salem and Forsyth County Nonresidential Construction Permit Values by Year (2006–2011)

Nonresidential construction permit values rose and fell during the 2006 to 2011 time frame. Construction permit activity rose in 2007 and 2011 and fell the remaining years. The highest construction value year for Forsyth County was in 2007 at \$155 million, while the lowest value year for Forsyth County occurred in 2010 at \$69 million followed by 2006 (before the recessionary period) at \$82 million. Permit activity rebounded to \$106 million in 2011.

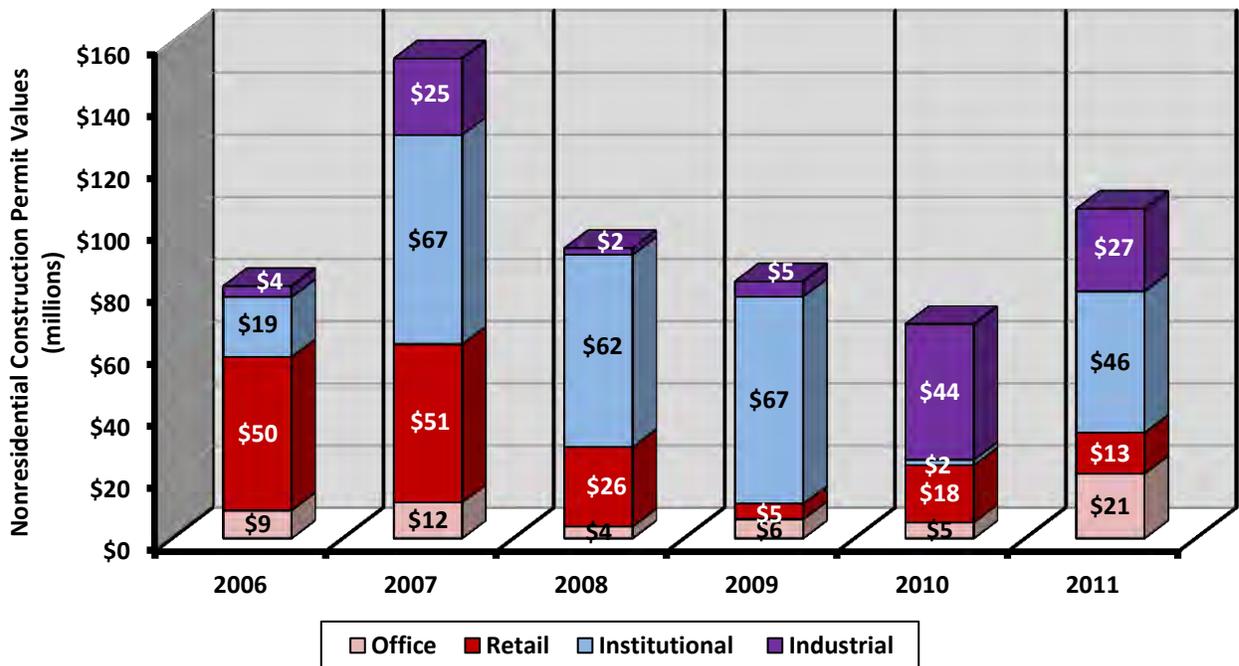
### Winston-Salem and Forsyth County Nonresidential Construction Permit Values by Year (2006–2011) (Continued)



Source: City-County Inspections Division

### Forsyth County Nonresidential Construction Permit Values by Land Use Type by Year (2006–2011)

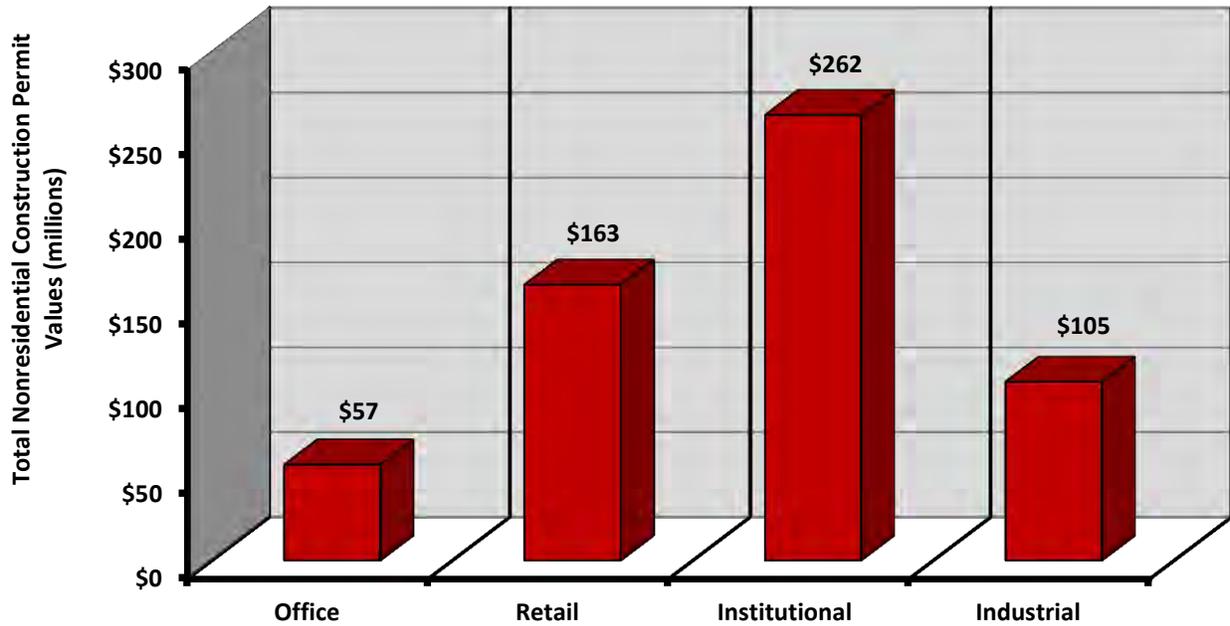
Institutional construction permits (e.g. for church, schools, hospitals, etc.) generated the highest values in Forsyth County for four of the six years (2007, 2008, 2009 and 2011). Retail construction permits led values in 2006 while industrial permits led the remaining year (2010). Discouragingly, office, retail and industrial construction permits totaled to only \$16 million in 2009, less than one-quarter of the institutional construction permit values.



Source: City-County Inspections Division

### Forsyth County Nonresidential Construction Permit Values by Land Use Type (Years 2006–2011)

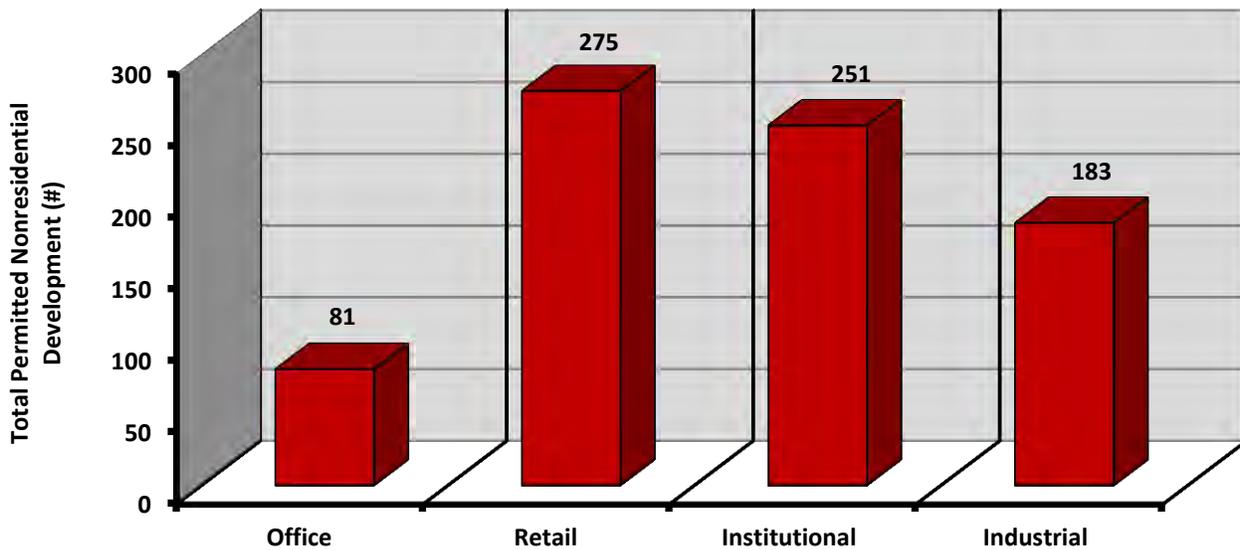
Institutional uses led in the total construction permit values in Forsyth County for the years 2006 to 2011 at \$262 million, 60% higher than the total construction permit values for the next highest land use category for the same period (retail uses at \$163 million).



Source: City-County Inspections Division

### Forsyth County Nonresidential Developments by Land Use Type (Years 2006–2011)

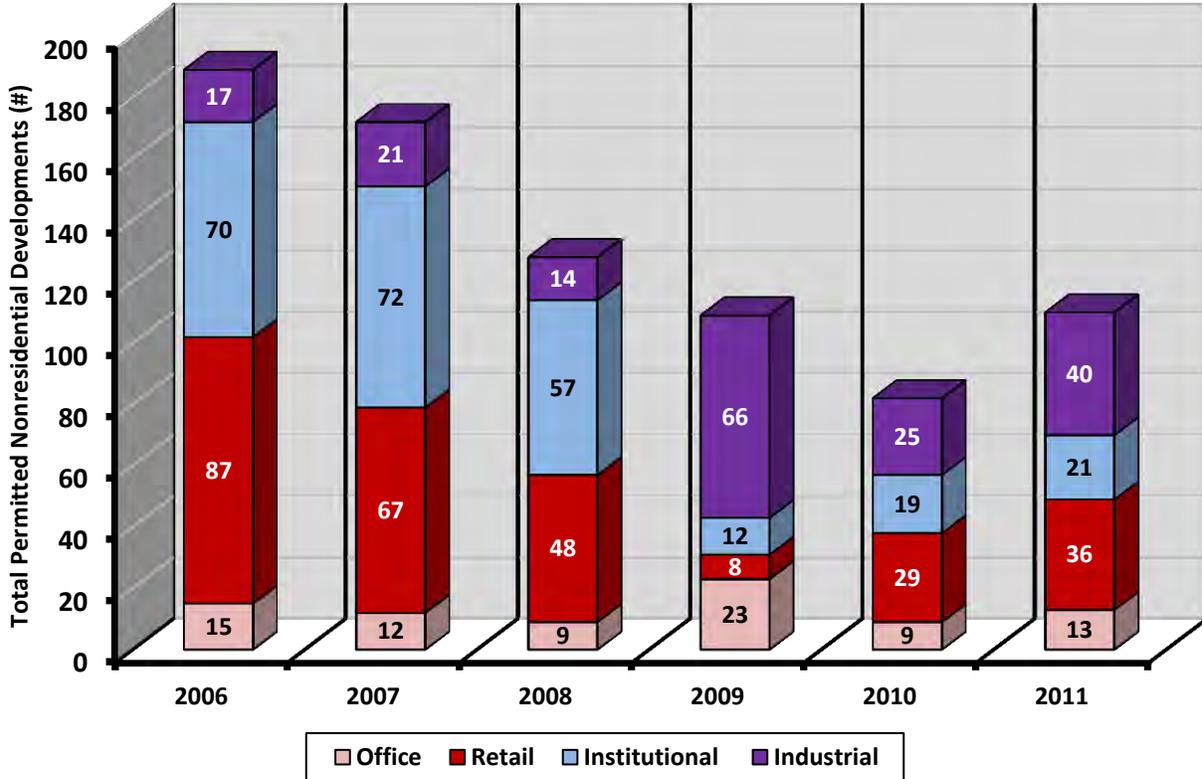
Retail uses led in the number of nonresidential developments permitted in Forsyth County between 2006 and 2011--totaling 275 developments, followed by institutional developments at 252 and industrial developments at 183.



Source: City-County Inspections Division

### Forsyth County Nonresidential Developments by Land Use Type by Year (2006–2011)

Retail developments were the most frequent type of land use permitted in 2006 and 2011 while institutional developments were the most frequent type of land use permitted in 2007 and 2008, and industrial developments were the most frequent in 2009 and 2011. The highest number of developments permitted for an individual land use category was retail in 2006 with 87 developments.



Source: City-County Inspections Division



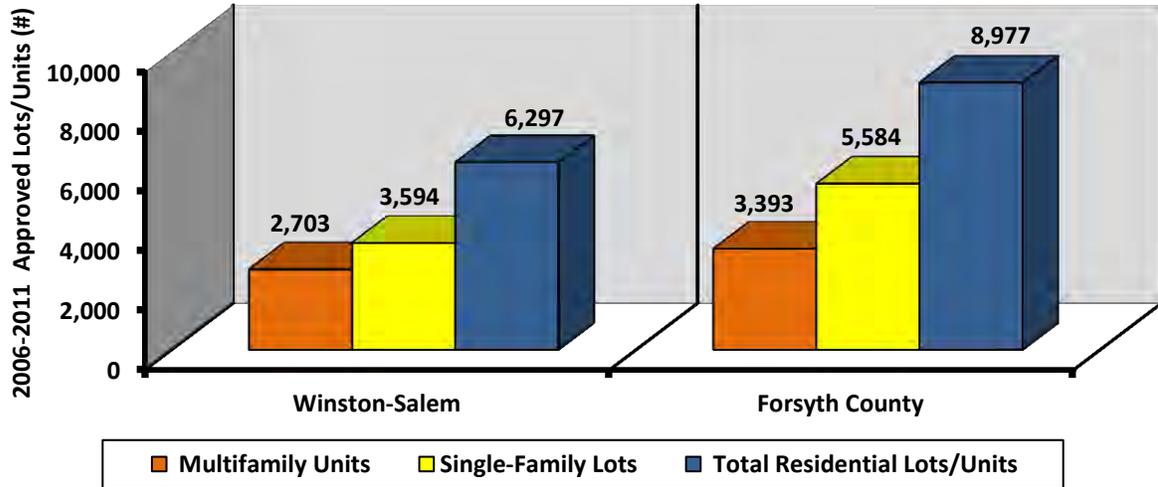
# Residential Development Patterns



## 2006-2011 Planning Board Approved Residential Development (and Comparisons to Selected Legacy Benchmarks)

### Approved Single-Family Lots and Multifamily Units (Years 2006–2011)

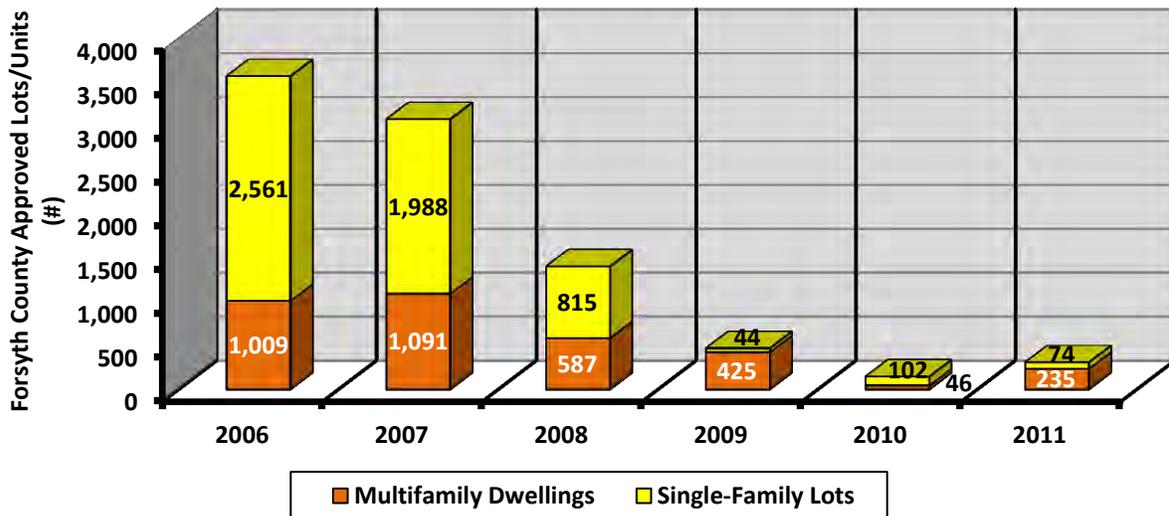
Between 2006 and 2011, nearly 9,000 single-family lots or multifamily dwelling units were approved in Forsyth County by various planning boards. Of the 9,000 residential units in Forsyth County, 62% were lots for single-family dwellings and 38% multifamily units. Of these 9,000 units, 6,300 (70%) were approved in Winston-Salem with 57% being lots for single-family dwellings and 43% multifamily units.



Source: City-County Planning Department

### Approved Single-Family Lots and Multifamily Units by Year (2006–2011)

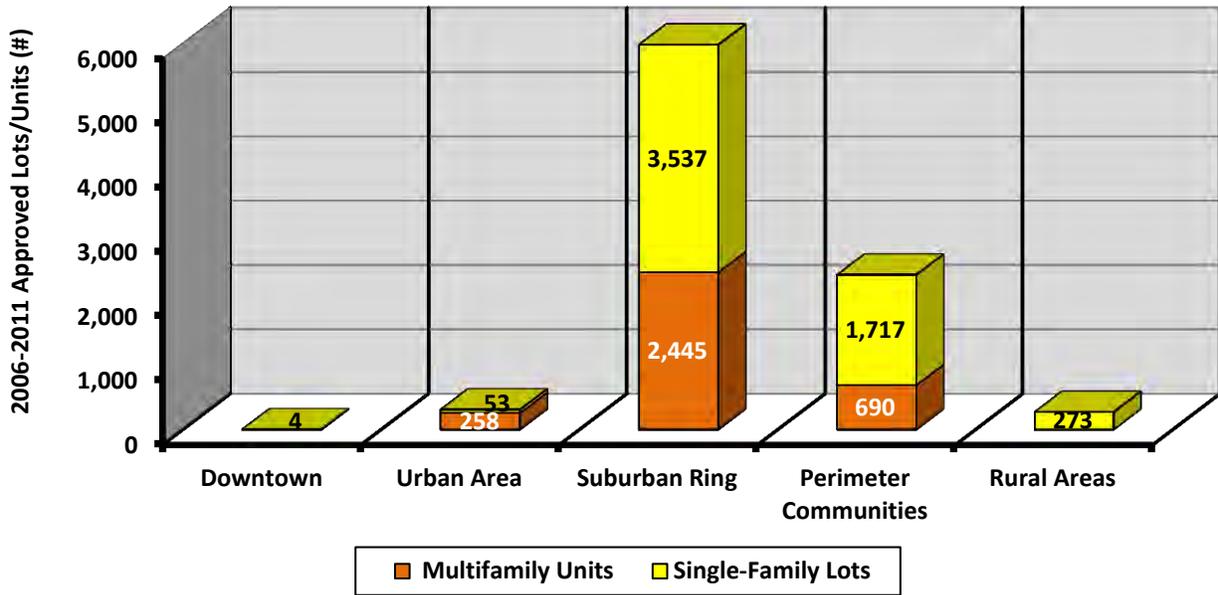
Total single-family lots and multifamily dwelling units have decreased every year between 2006 and 2010 with a very slight increase in 2011. Total approved dwelling units have decreased by 91% since 2006 from 3,570 total units to 469 total units in 2009. The drastic drop is most likely a result of the Great Recession.



Source: City-County Planning Department

**Approved Single-Family Lots and Multifamily Units by Planning Region (Years 2006–2011)**

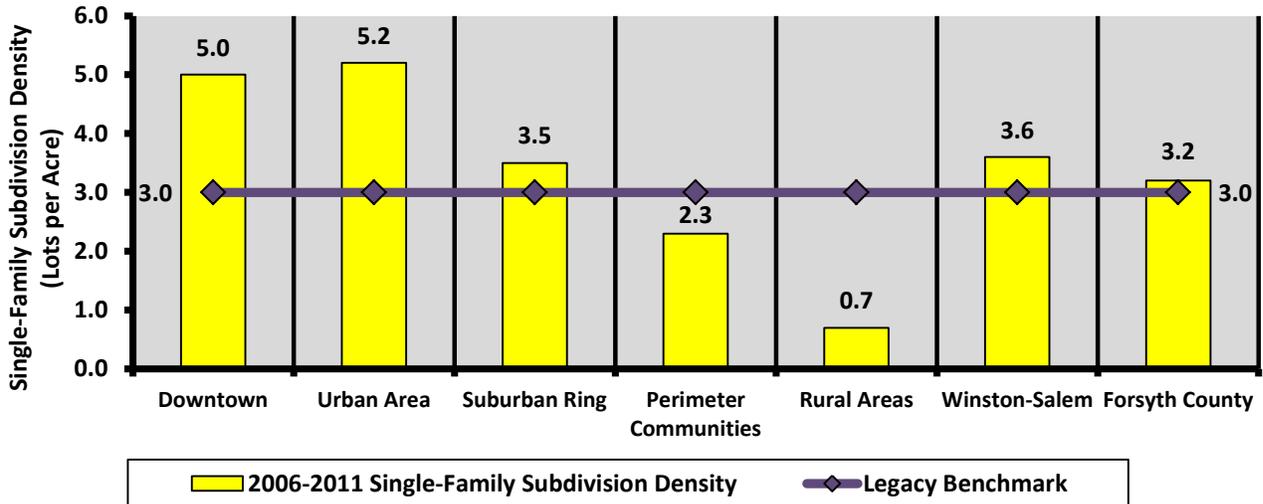
The majority of residential dwelling units were approved for Winston-Salem’s Suburban Ring (63% of the single-family lots; 72% of the multifamily units). The second highest number of residential lots and units were approved for Forsyth County’s Perimeter Communities.



Source: City-County Planning Department

**Approved Single-Family Subdivision Density by Planning Region (Years 2006-2011)**

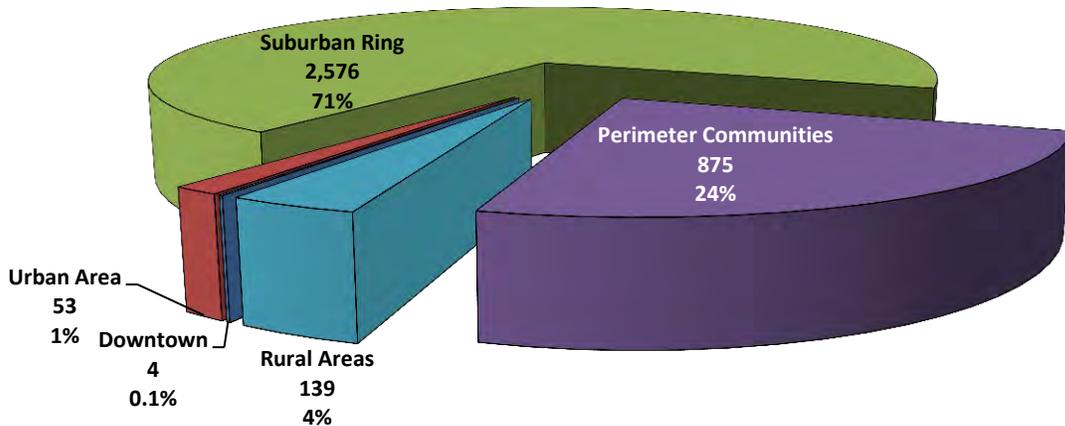
Legacy set a benchmark of 3.0 lots per acre as the average density for new single-family subdivisions in Forsyth County’s municipal service area (MSA). Approved subdivisions lots for the 2006 to 2011 period improved from previous periods in meeting that standard with 3.6 lots per acre for Winston-Salem and 3.2 lots per acre for Forsyth County (up from 2.6 and 2.0 lots per acre, respectively). Winston-Salem’s Downtown and Urban Area both exceeded 5.0 lots per acre while Forsyth County’s Perimeter Communities increased to an average of 2.3 lots per acre from 1.7 lots per acre.



Source: City-County Planning Department

### Approved Planned Residential Developments by Planning Region (Years 2006–2011)

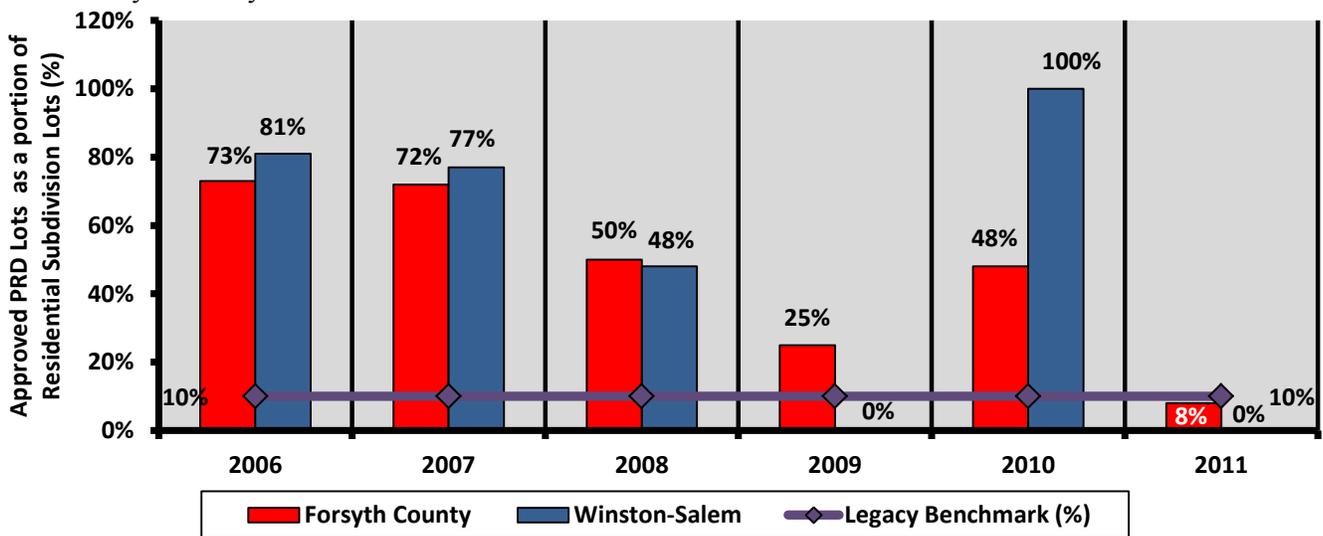
Planned Residential Developments (PRDs) are subdivisions designed with a percentage of the development reserved for open space. The intent of PRDs is to allow for more efficient land development by allowing smaller lots in the most suitable portions of a large site while preserving open space. Smaller lots clustered on a tract allow for shorter extensions of roads and utilities while maintaining permitted densities. Of the total 3,650 PRD lots approved between 2006 and 2011, more than 4,900 PRD lots (70%) were located in Winston-Salem’s Suburban Ring followed by 1,800 lots (26%) in Forsyth County’s Perimeter Communities.



Source: City-County Planning Department

### Approved Planned Residential Development Lots as Percentage of Total Single-Family Lots by Year (2006–2011)

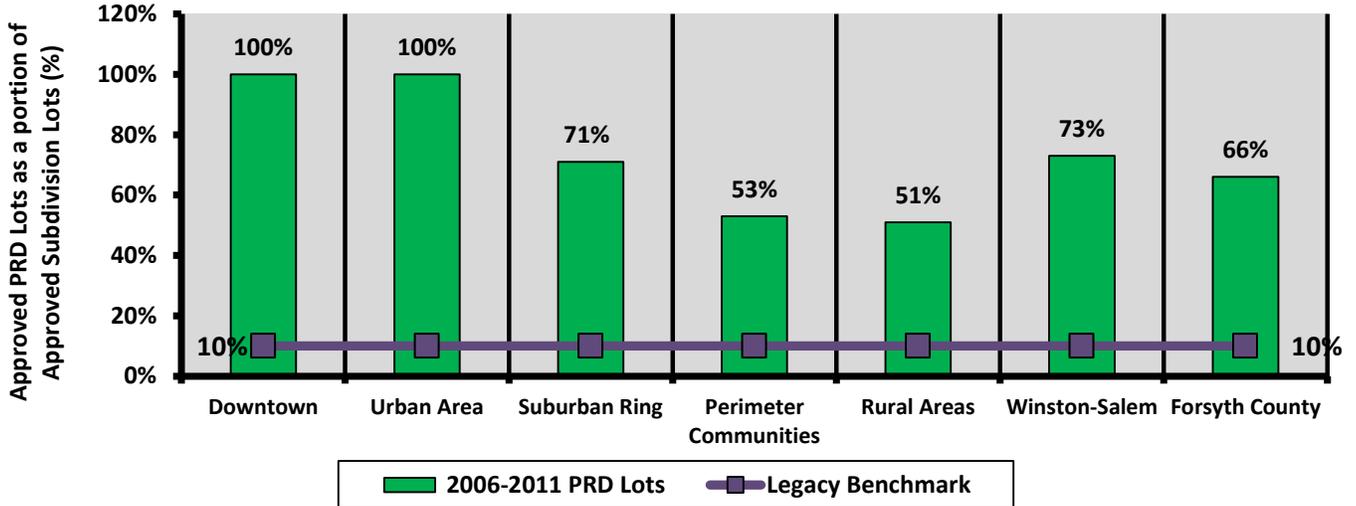
Forsyth County’s comprehensive plan, *Legacy*, proposed a benchmark of at least 10% of single-family subdivision lots be developed as Planned Residential Developments, or PRDs. That benchmark had been exceeded greatly in Winston-Salem and Forsyth County every year in this decade until 2009 when PRDs accounted for 25% of the total single-family lots. The highest proportions occurred in 2006 with almost three-quarters of subdivision lots being in PRDs in Forsyth County and 8 out of 10 lots in Winston-Salem.



Source: City-County Planning Department

### Approved Planned Residential Development Lots as a Percentage of Total Single-Family Lots by Planning Region (Years 2006–2011)

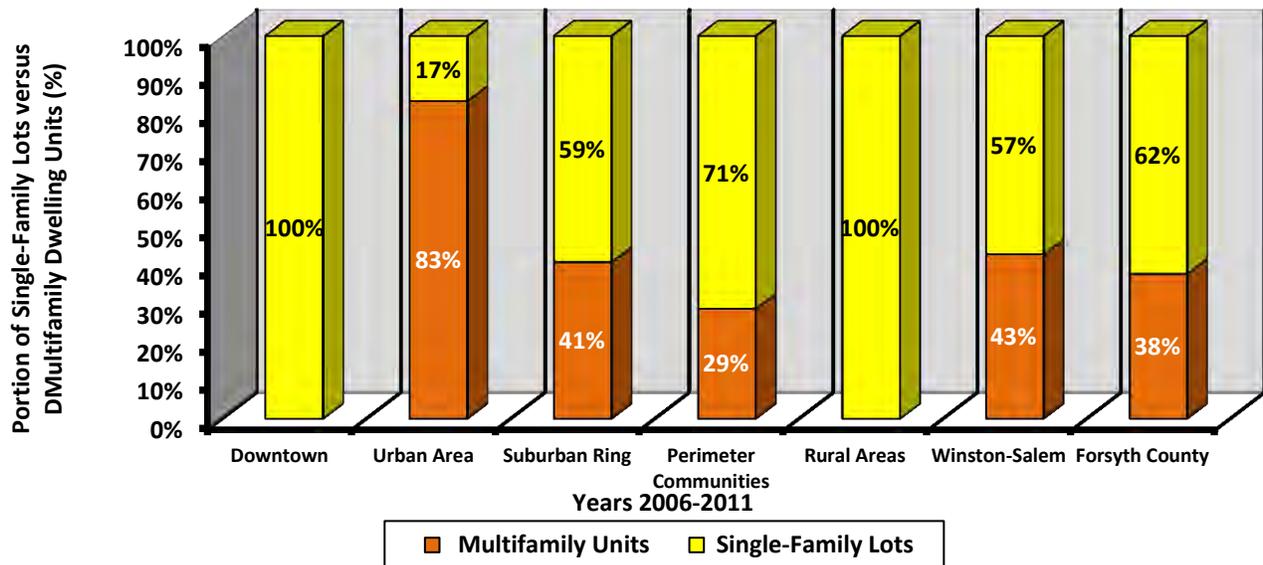
The Legacy Planned Residential Development (PRD) benchmark is still being exceeded in all planning regions of Forsyth County for total PRD lots between 2006 and 2011, from a surprising 50% of subdivision developments in Rural Areas to a high of 100% in Winston-Salem's Downtown and Urban Area. Overall, the proportions are 73% in Winston-Salem and 66% in Forsyth County, down slightly from previous time periods.



Source: City-County Planning Department

### Approved Single-Family Lots to Multifamily Units Percentages by Planning Region (Years 2006–2011)

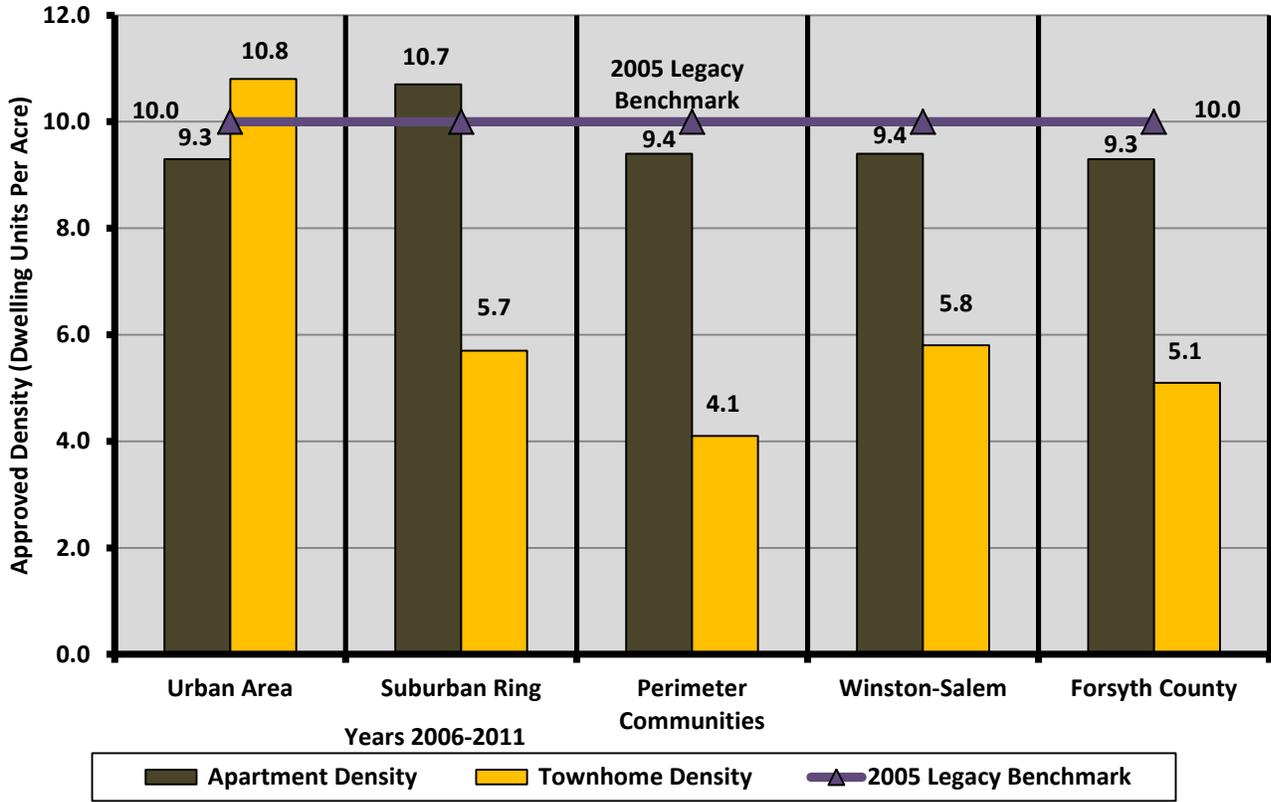
In Winston-Salem's Suburban Ring, approved single-family subdivision lots exceeded multifamily dwelling units by a 60% to 40% ratio. In Forsyth County's Perimeter Communities, 70% of approved residential units were for single-family lots compared to 30% for multifamily dwelling units. Multifamily dwelling units accounted for 83% of the approved residential units within Winston-Salem's Urban Area. Overall in Forsyth County, more single-family subdivision lots were proposed as compared to multifamily dwelling units by a 62% to 38% margin from 2006 to 2011.



Source: City-County Planning Department

**Approved Multifamily Development Density by Planning Region (Years 2006-2011)**

*Legacy* proposed a multifamily development density benchmark, comprised of apartment and townhome developments, of 10.0 units per acre for Forsyth County. New apartments approved for overall Winston-Salem and Forsyth County both fell below *Legacy*'s benchmark between 2006 and 2011 at 9.4 units per acre and 9.3 units per acre, respectively. Winston-Salem's Suburban Ring had new apartment densities of 10.7 units per acre while Forsyth County's Perimeter Communities had new apartment densities of 9.4 units per acre. New townhome densities ranged from a high of 10.8 units per acre in the Urban Area to 4.1 units per acre in the Perimeter Communities. Overall, Forsyth County had a density of 5.1 units per acre density for new townhomes from 2006 to 2011.



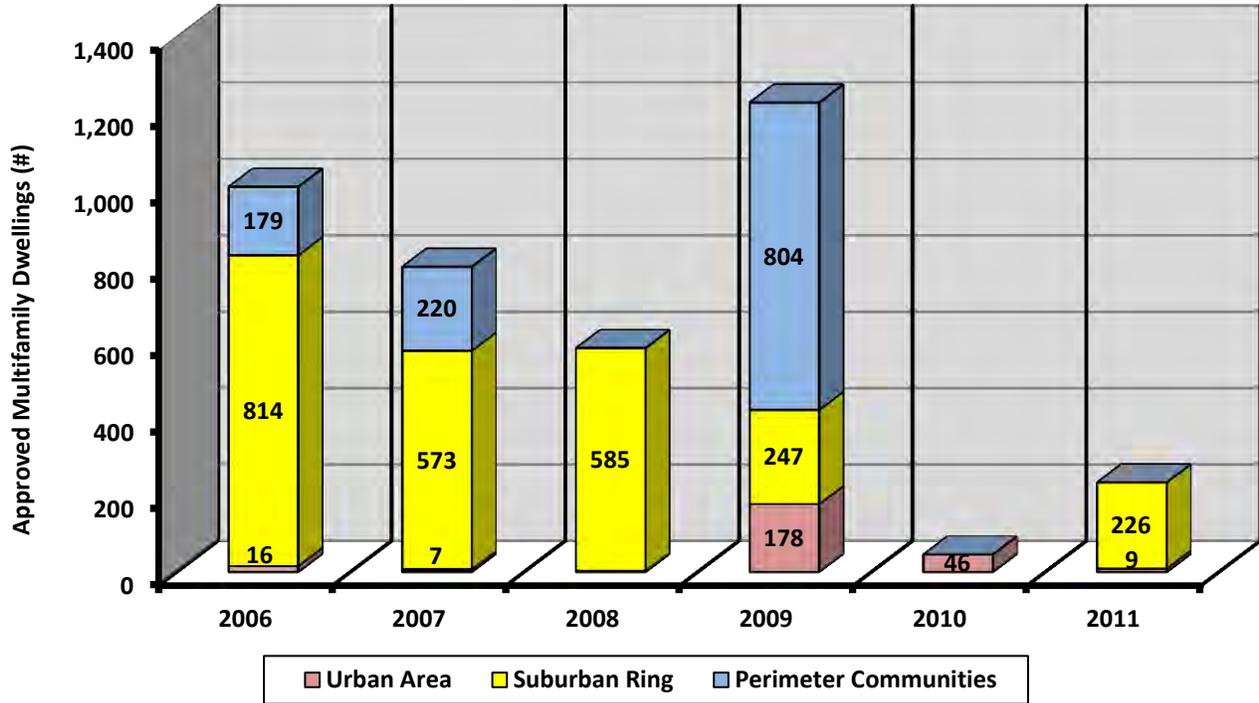
Source: City-County Planning Department

**Approved Multifamily Dwelling Units by Planning Region by Year (2006–2011)**

In years 2006, 2007, 2008 and 2011, the most multifamily dwelling units were approved in Winston-Salem's Suburban Ring. In 2009, the most multifamily dwelling units were approved in the Perimeter Communities.

For individual planning regions, Winston-Salem's Urban Area had the most multifamily units approved in 2009 with 179 dwelling units. Winston-Salem's Suburban Ring had the most multifamily units approved in 2006 with 814 dwelling units, while Forsyth County's Perimeter Communities' had the most multifamily units approved in 2009 with 804 dwelling units.

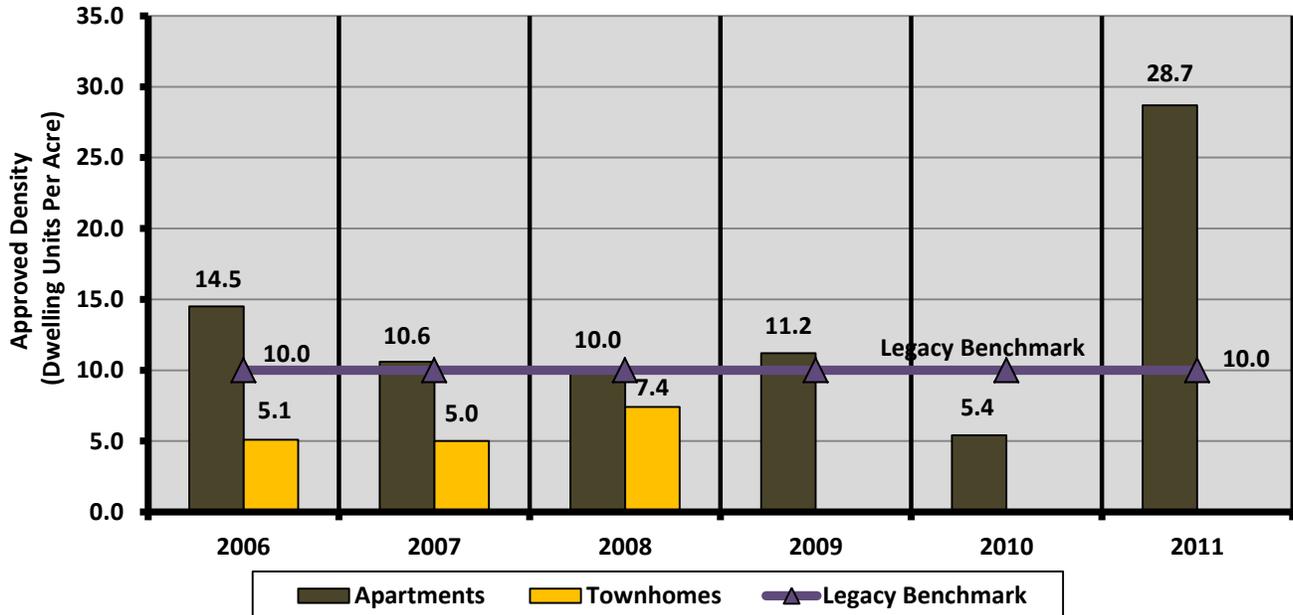
**Approved Multifamily Dwelling Units by Planning Region by Year (2006–2011)**  
(Continued)



Source: City-County Planning Department

**Approved Multifamily Development Density by Housing Type by Year (2006-2011)**

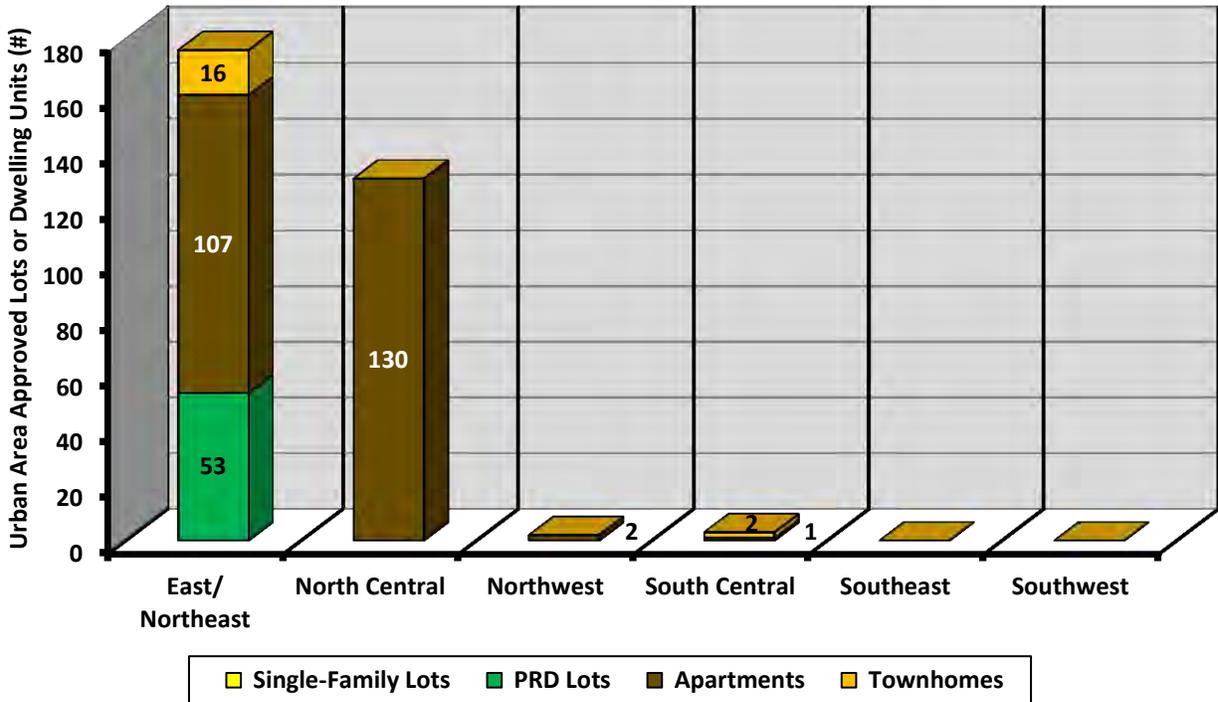
Apartment development equaled or exceeded the *Legacy* density benchmark of 10.0 units per acre in every year except for 2009 when no units were approved and 2010 when its density was only 5.4 units per acre. Approved townhome developments averaged between 5 and 7.5 dwelling units for years 2006 to 2008.



Source: City-County Planning Department

### Winston-Salem's Urban Area Approved Housing Types by Individual Planning Areas (Years 2006-2011)

As expected, there were more multifamily development approvals for individual planning areas within the Urban Area between 2006 and 2011 than for single-family development approvals. Apartments were the most prevalent housing type approved between 2006 and 2011 with 130 units in the North Central Planning Area and 107 units in the East/Northeast Planning Area. Sixteen townhomes were also approved in the East/Northeast Planning Area. The highest number of single-family lots in Planned Residential Developments (PRDs) was 53 lots, again approved for the East/Northeast Planning Area. Surprisingly, there were zero traditional single-family subdivision lots approved by the Planning Board between 2006 and 2011 in Winston-Salem's Urban Area.



Source: City-County Planning Department

### Winston-Salem's Suburban Ring Approved Housing Types by Planning Area (Years 2006-2011)

The most common form of approved housing development in the Suburban Ring is Planned Residential Developments (PRDs), which are single-family subdivisions with clustered lots and planned open space, with 2,577 lots approved between 2006 and 2011. Apartments are the next most prevalent approved housing type with 2,047 dwelling units approved between 2006 and 2011 followed by traditional single-family subdivision with 938 lots.

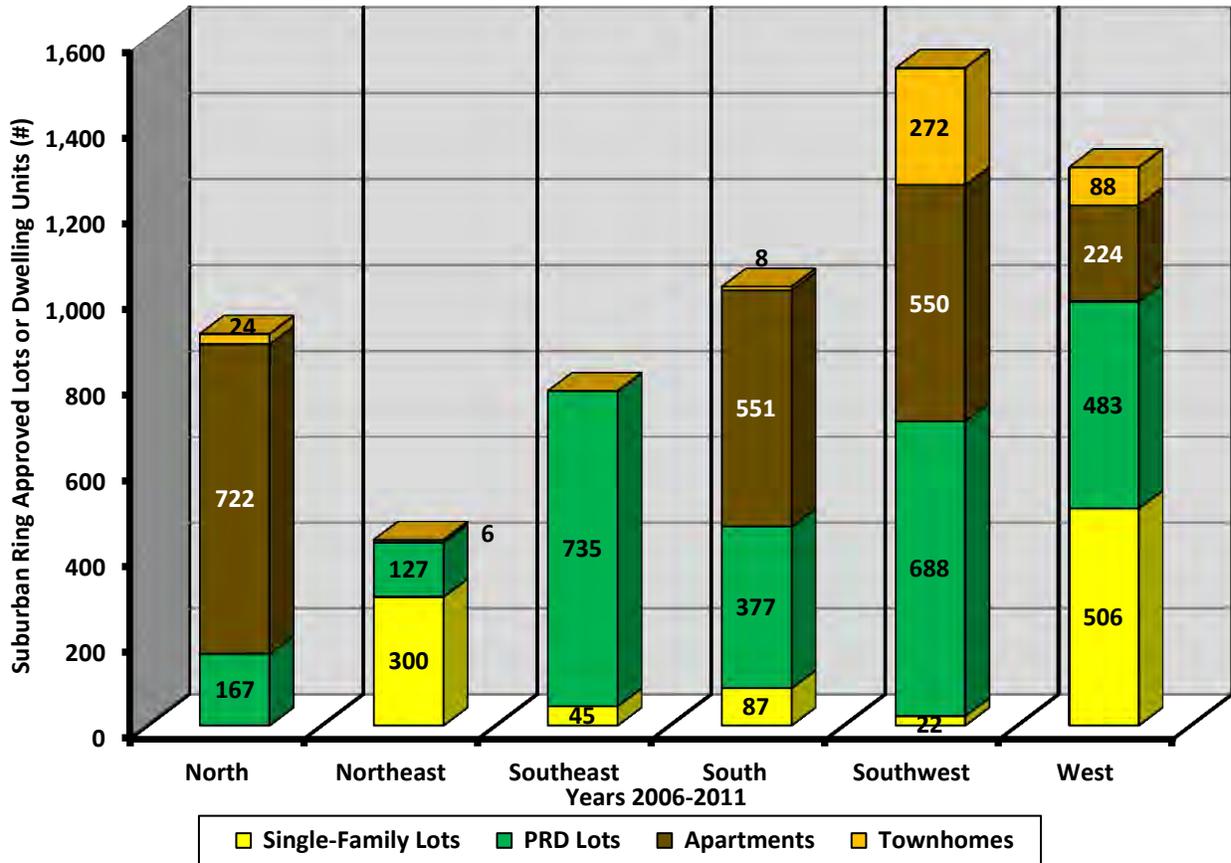
For PRDs, the highest number approved between 2006 and 2011 has been in the Southeast Suburban Planning Area with 735 lots, followed closely by the Southwest Suburban Planning Area with 688 lots.

The highest number of approved apartments has been in the North Suburban Planning Area with 722 units, followed by 550 units each in the South Suburban and Southwest Suburban Planning Areas. Townhome dwelling units continue to be the least prevalent housing type approved by the

the Planning Board with only 392 units. The Southwest Suburban Planning Area had the most townhome approvals with 272 units.

The highest number of approved traditional single-family subdivision lots between 2006 and 2011 has been in the West Suburban Planning Area with 506 lots, followed by the Northeast Suburban Planning Area with 300 lots and the South Suburban Planning Area with 163 lots.

The highest total number of residential units approved between 2006 and 2011 occurred in the Southwest Suburban Planning Area with 1,532 units followed by the West Suburban Area with 1,300 units.

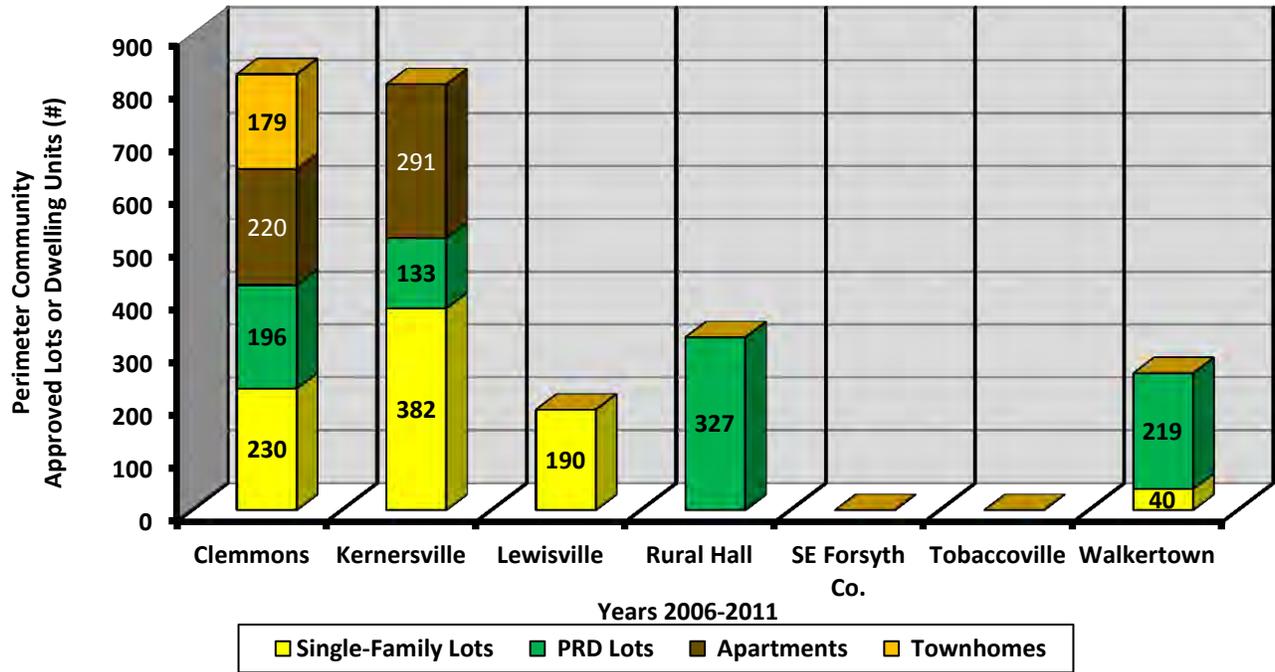


Source: City-County Planning Department

### Forsyth County’s Perimeter Community Approved Housing Types by Planning Area (Years 2006-2011)

Planned Residential Developments (PRDs), which are single-family subdivisions with clustered lots and planned open space, surpassed traditional single-family subdivision lots as the most prevalent approved housing type in the Perimeter Communities with 875 lots. Traditional single-family subdivision lots followed closely behind with 842 lots. Apartment developments had 511 units approved while townhome developments had only 179 units approved in the Clemmons Planning Area. The Rural Hall Planning Area had the highest number of approved PRD lots with 326, followed by 219 lots in the Walkertown Planning Area and 196 lots in the Clemmons

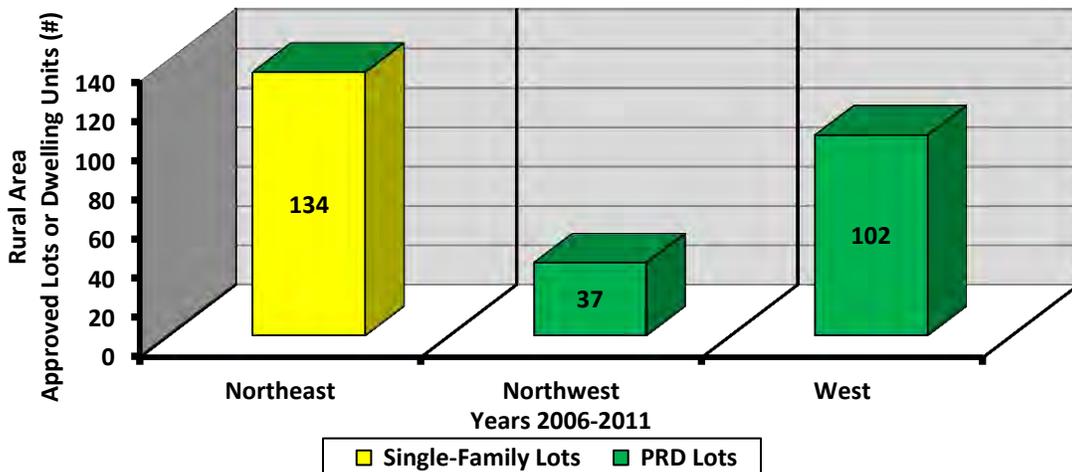
Planning Area. The highest number of traditional subdivision lot approvals between 2006 and 2011 occurred in Kernersville with 640 lots followed by Clemmons with 230 lots, and Lewisville with 190 lots.



Source: City-County Planning Department

### Forsyth County Rural Area Approved Housing Types (Years 2006-2011)

Housing approvals in the Rural Area of Forsyth County were evenly split between traditional single-family subdivision developments with 134 lots and Planned Residential Developments with 139 lots. Planned Residential Developments (PRDs) are single-family subdivisions with clustered lots and planned open space. All of the traditional subdivision lots were approved for the Northeast Rural Planning Area while all of the PRD approvals were located in the West or Northwest Rural Planning Areas. No townhome or apartment developments were approved in the Rural Area during this time period.

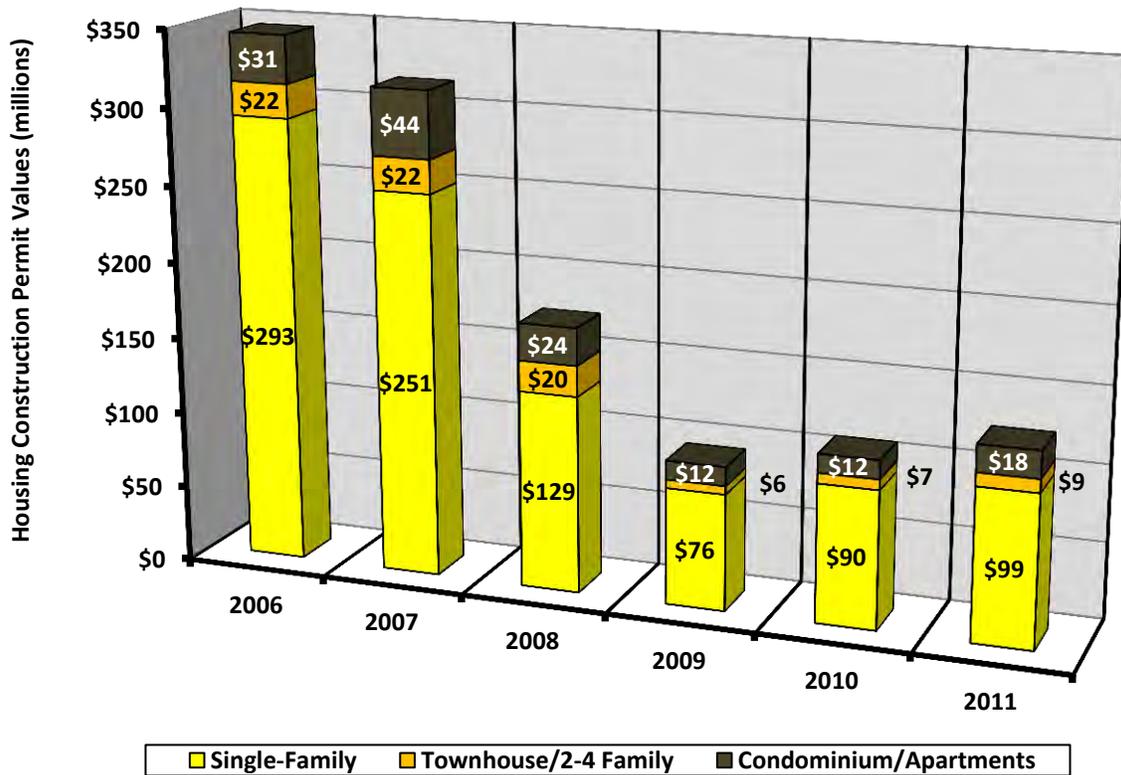


Source: City-County Planning Department

## 2006–2011 Forsyth County Residential Construction Permit Trends

### Residential Construction Values by Housing Type by Year (2006–2011)

For single-family dwellings, construction values reached a peak of \$293 million in 2006, then decreased by 10% in 2007 (\$251 million), before dropping by nearly 50% to \$129 million between 2007 and 2008 and dropping again 40% to \$76 million in 2009. Since 2009, single-family values have increased by 30% to \$100 million. Townhome/2-4 family dwelling construction values remained steady between 2006 and 2008, hovering around \$20 million per year, before dropping to \$6 million in 2009. Construction values have since increased slightly to \$9 million in 2011. Condominium/apartment construction values have fluctuated during the time period, ranging from a high of \$44 million in 2007 to lows of \$12 million in 2009 and 2010.

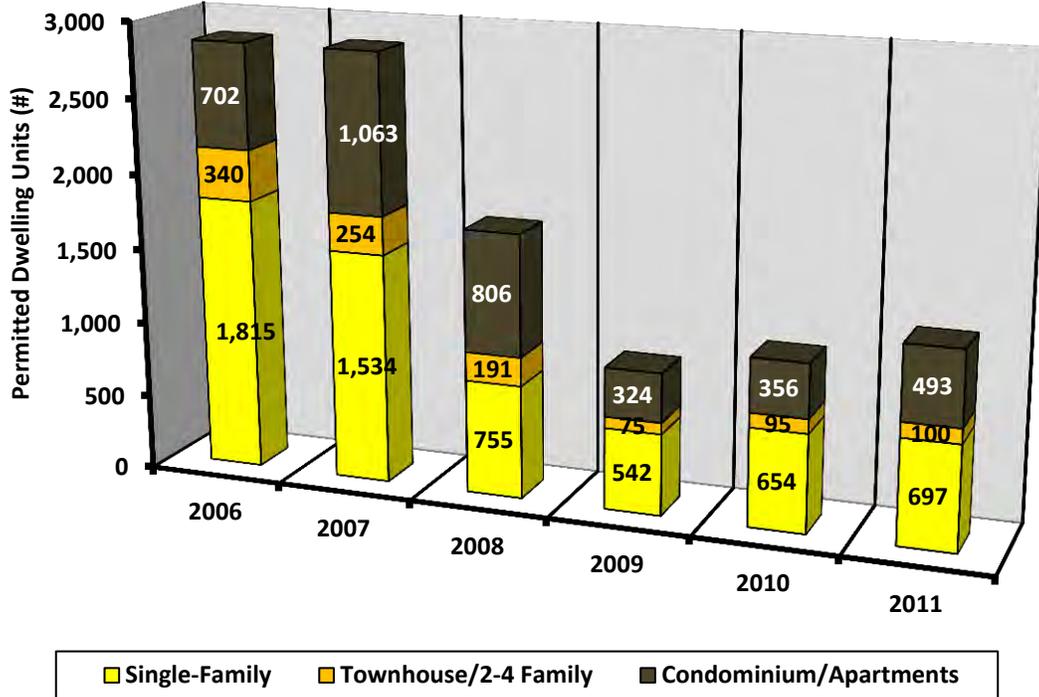


*Source: Cit-County Inspections Division*

### Dwelling Units by Housing Type by Year (2006–2011)

The number of single-family dwelling permits dropped dramatically, by 70%, from 1,815 units in 2006 to 542 units in 2009 before rebounding by 30% to 700 units in 2011. Permitted condominium/apartment units increased to a peak of 1,063 units in 2007, decreasing by 70% to a low of 324 units in 2009, before rising again by 50% to nearly 500 units in 2011. Townhouse/2-4 family dwellings dropped steadily between 2006 and 2009 from 340 to 75 units before increasing to 100 units in 2011.

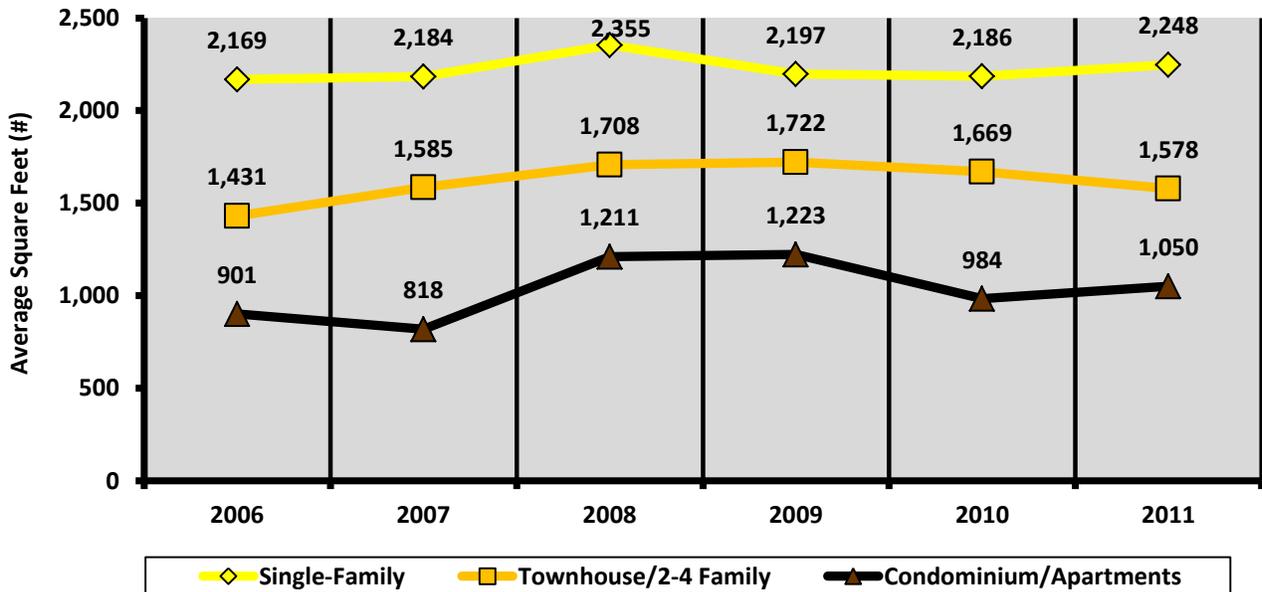
### Dwelling Units by Housing Type by Year (2006–2011) (Continued)



Source: City-County Inspections Division

### Average Square Footage by Housing Type by Year (2006–2011)

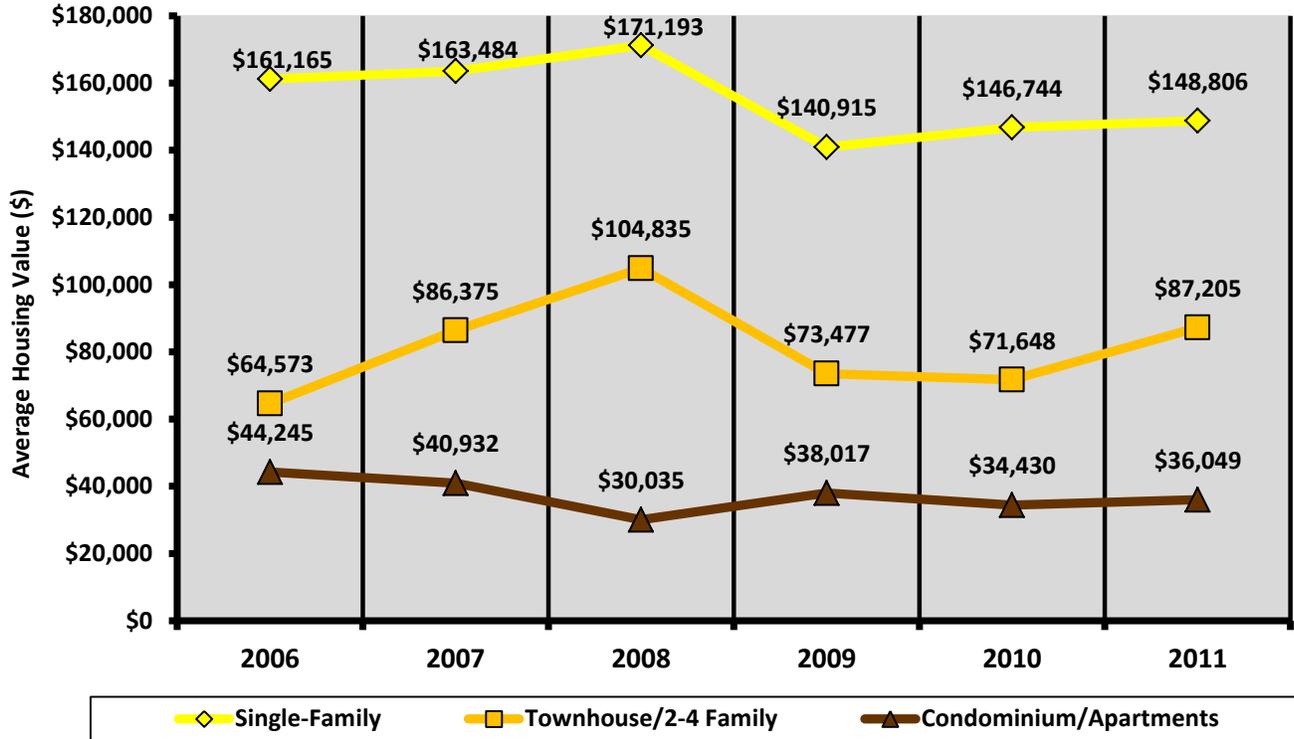
The average size of single-family dwellings permitted has remained fairly consistent during the 2006-2011 time period ranging between 2,100 and 2,400 square feet. The average size of townhouses and 2-4 family dwellings has ranged between 1,400 and 1,700 square feet while the average size of condominiums/apartments have ranged from 900 to 1,200 square feet during the 2006-2011 time period.



Source: City-County Inspections Division

### Average Dwelling Value by Housing Type by Year (2006–2011)

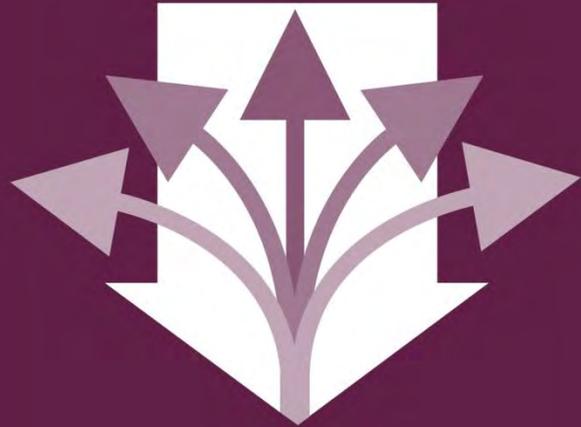
The average value for single-family homes permitted dropped by 18% in 2009 (from \$171,200 in 2008 to \$141,000) after steadily climbing in value the previous several years. The average value of single-family dwellings has risen slowly by 6% to \$148,800 in 2011. Townhomes and 2-4 family dwellings decreased in average value by 30% in 2009 from \$104,800 to \$73,500 before rising by 19% to \$87,200 in 2011. The average value of condominium and apartment units permitted increased in 2009 by 27% from a low of \$30,000 in 2008 to \$38,000 in 2009. The average values have since fallen by 5% to \$36,000 in 2011.



Source: City-County Inspections Division



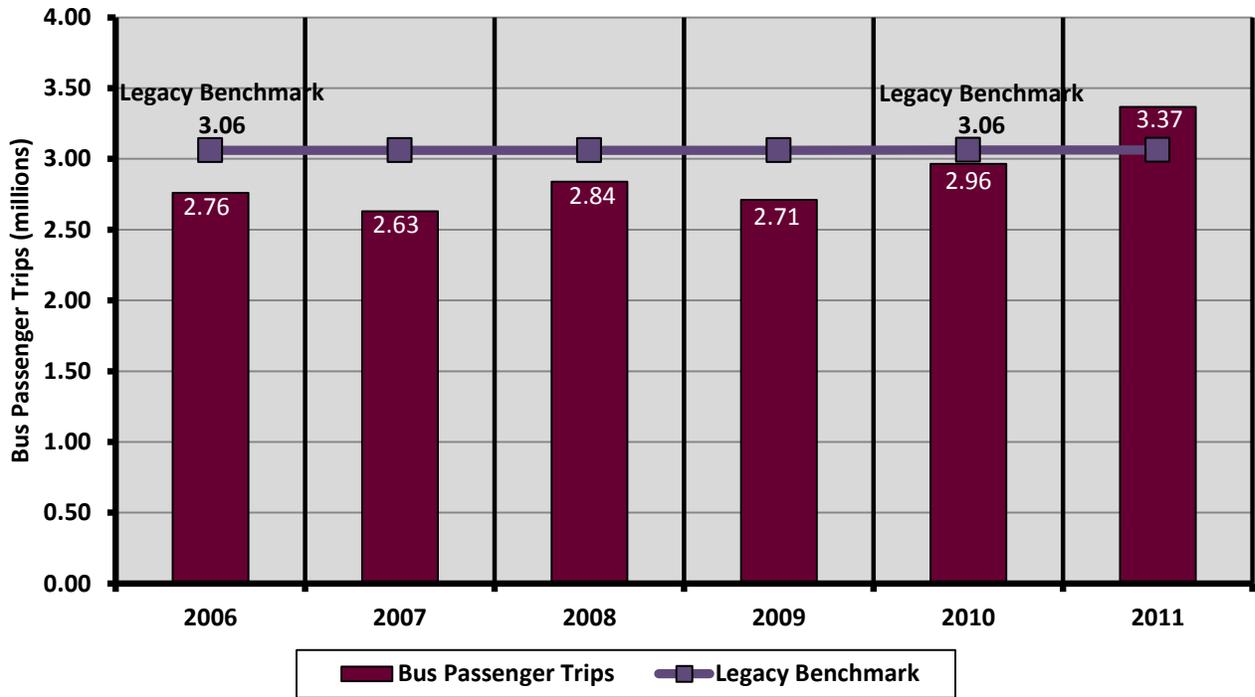
# Transportation



## Winston-Salem Transit Authority (WSTA) Bus Passenger Ridership

### WSTA Annual Bus Passenger Ridership by Year (2006–2011)

*Legacy* envisions future land use patterns that will support and promote public transit by either bus or rail. WSTA annual ridership has vacillated between 2006 and 2011, but it has risen by 24% since 2009 to 3.37 million riders annually. For the first time, the annual ridership level has exceeded the Legacy benchmark of 3.06 million riders by 10%. It is presumed that the increase in ridership is due an extended rise in gasoline prices and falling household incomes since the beginning of the recessionary period in 2007.



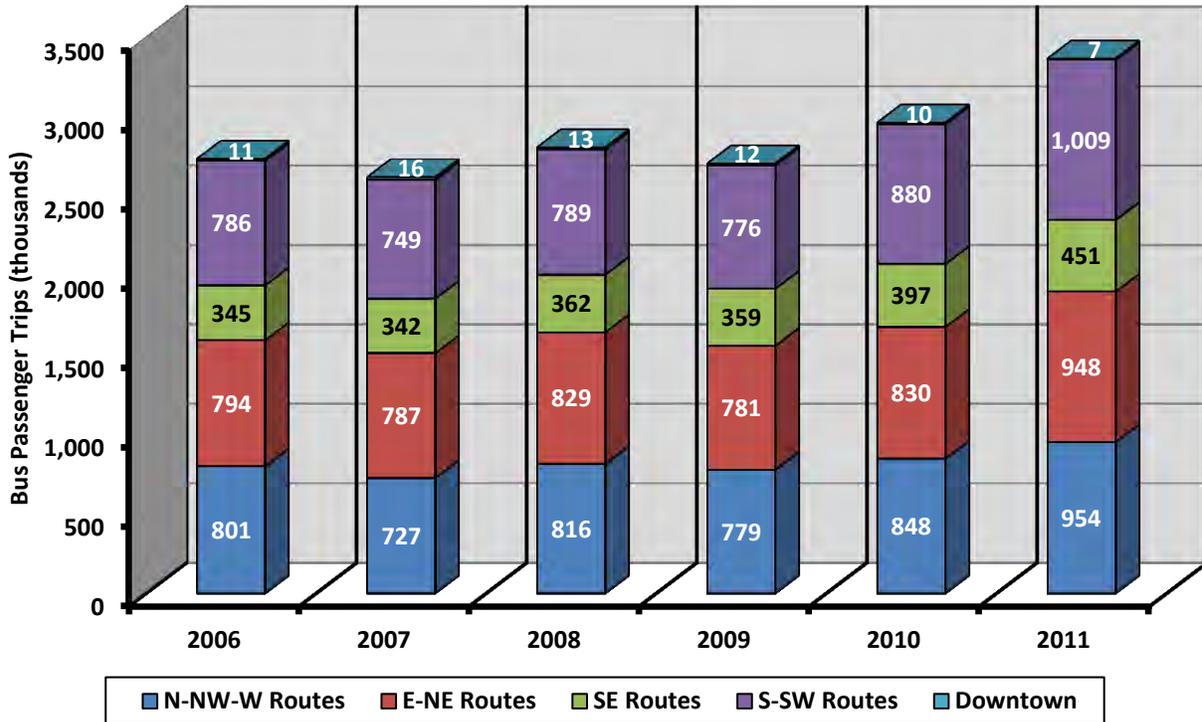
Source: Winston-Salem Transit Authority (WSTA)

### WSTA Annual Bus Passenger Ridership and Ridership Change by Generalized Planning Area (2006–2011)

WSTA bus routes have been aggregated to generalized planning areas since bus routes travel through several different planning areas and ridership data cannot be compiled by individual planning areas. All of the generalized planning areas routes had fluctuating ridership levels between 2006 and 2011, rising in years 2006, 2008, 2010 and 2011 while falling in years 2007 and 2009.

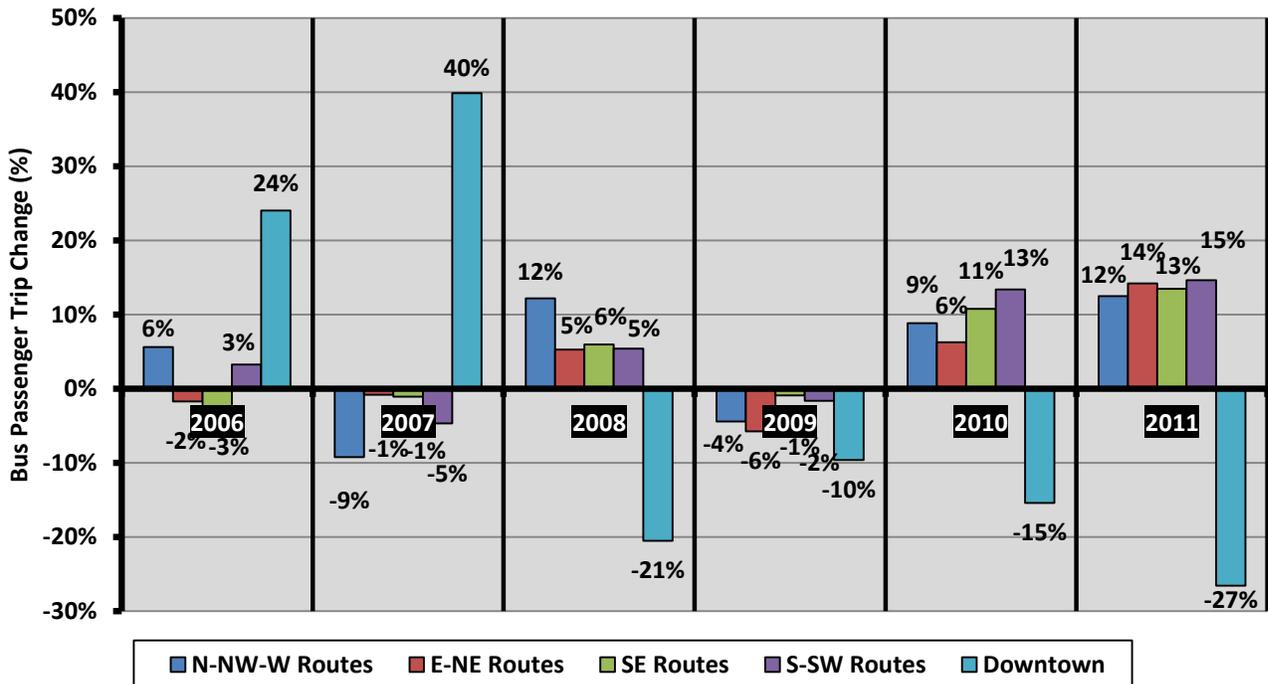
The East and Northeast Planning Area routes typically had the highest ridership levels geographically, followed by the North, Northwest and West Planning Area routes and then the South and Southwest Planning Area routes. In 2011, the South and Southwest Planning Area routes had the highest ridership surpassing the 1,000,000 ridership level, followed by the North, Northwest and West Planning Area routes at 954,000 riders and the East and Northeast Planning Area routes with 948,000 riders. The Southeast Planning Area routes have increased from 350,000 to 450,000 annual riders, with the Downtown Routes decreasing by 10% to 20% every year since 2007 from 16,000 annual riders in 2007 to 7,000 riders in 2011.

### WSTA Annual Bus Passenger Ridership by Generalized Planning Area (2006–2011)



Source: Winston-Salem Transit Authority (WSTA)

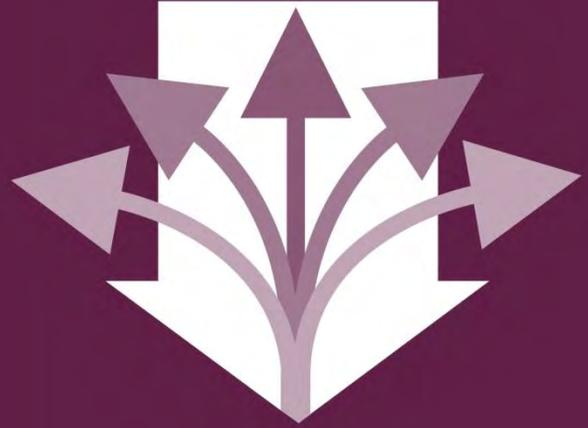
### WSTA Annual Bus Passenger Ridership Change by Generalized Planning Area (2006–2011)



Source: Winston-Salem Transit Authority (WSTA)



# Economy



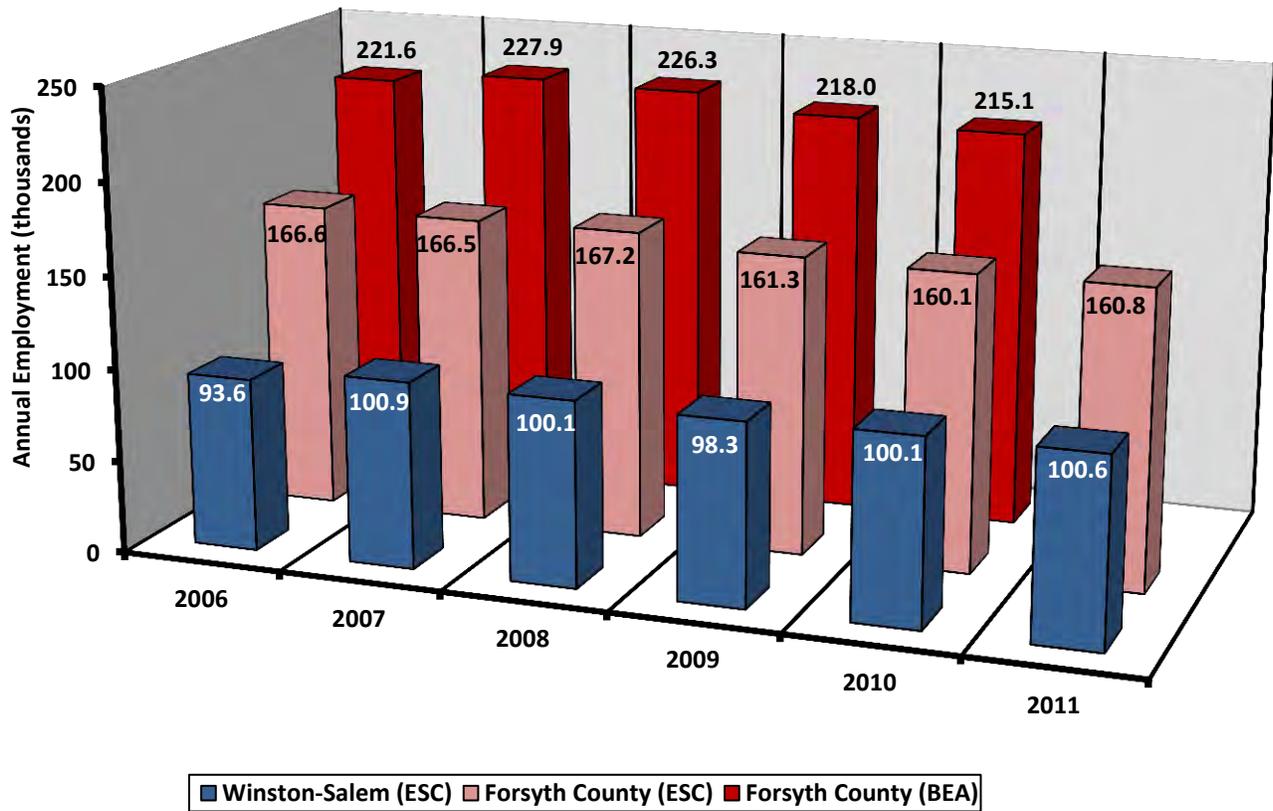
## Employment

### Forsyth County Annual Employment and Change by Year (2006–2011)

Employment figures for Forsyth County have been revised to show less fluctuation than was indicated in 2009. Total employment in Forsyth County has consistently declined between 2007 and 2011 by a net decrease of 5,700 people according to the N.C. Employment Security Commission (ESC) and by a net decrease of 12,800 according to the U.S. Bureau of Economic Analysis (BEA). The most dramatic decrease was in 2009 when Winston-Salem’s employment dropped by 1,800 people (2%) while Forsyth County’s employment dropped by 5,900 (4%) according to ESC and by 8,300 (4%) according to BEA. Presumably, these figures reflect the job losses as a result of the Great Recession of 2007-2010. ESC figures show a very small employment rebound in 2011 of 500 people for Winston-Salem and 700 people for Forsyth County.

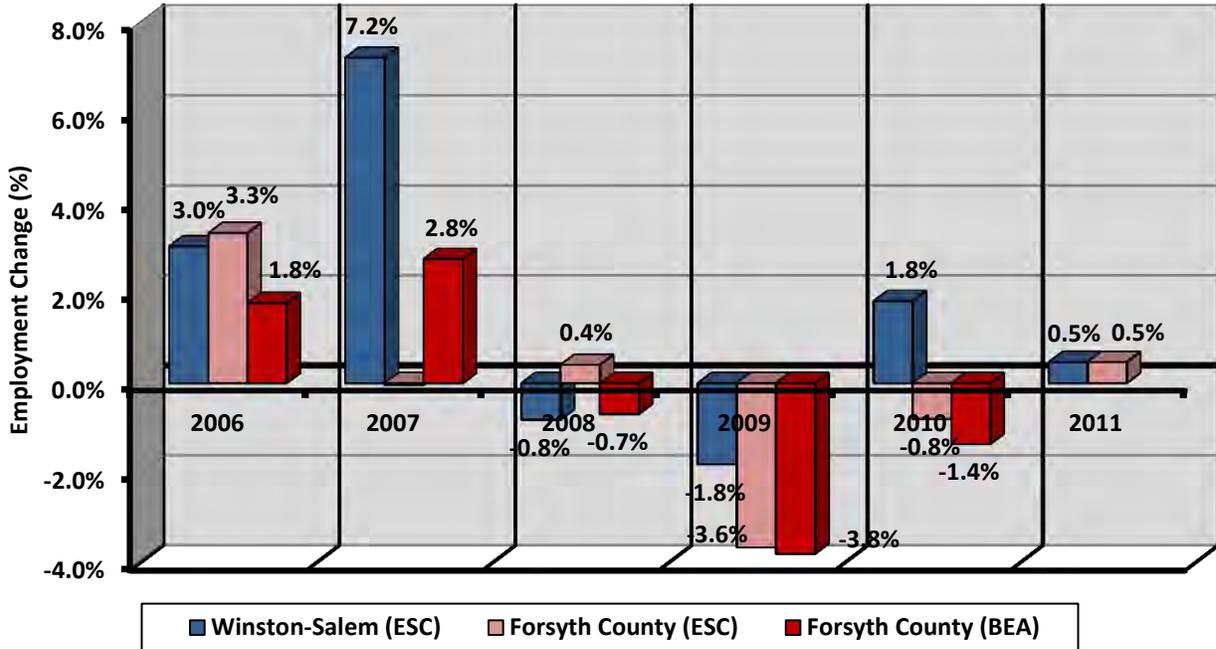
The consistent difference of 55,000 to 60,000 people each between the ESC and BEA employment estimates may give an indication as to self-employment and part-time employment in Forsyth County. ESC figures are based on reports from employers who pay unemployment insurance and are not a complete figure of all employment. BEA employment estimates include the military, farm employment, the self-employed and part-time employment.

### Forsyth County Total Employment by Year (2006–2011)



Sources: North Carolina Employment Security Commission (ESC); U.S. Department of Commerce, Bureau of Economic Analysis (BEA)  
 Note: 2011 BEA data not available yet.

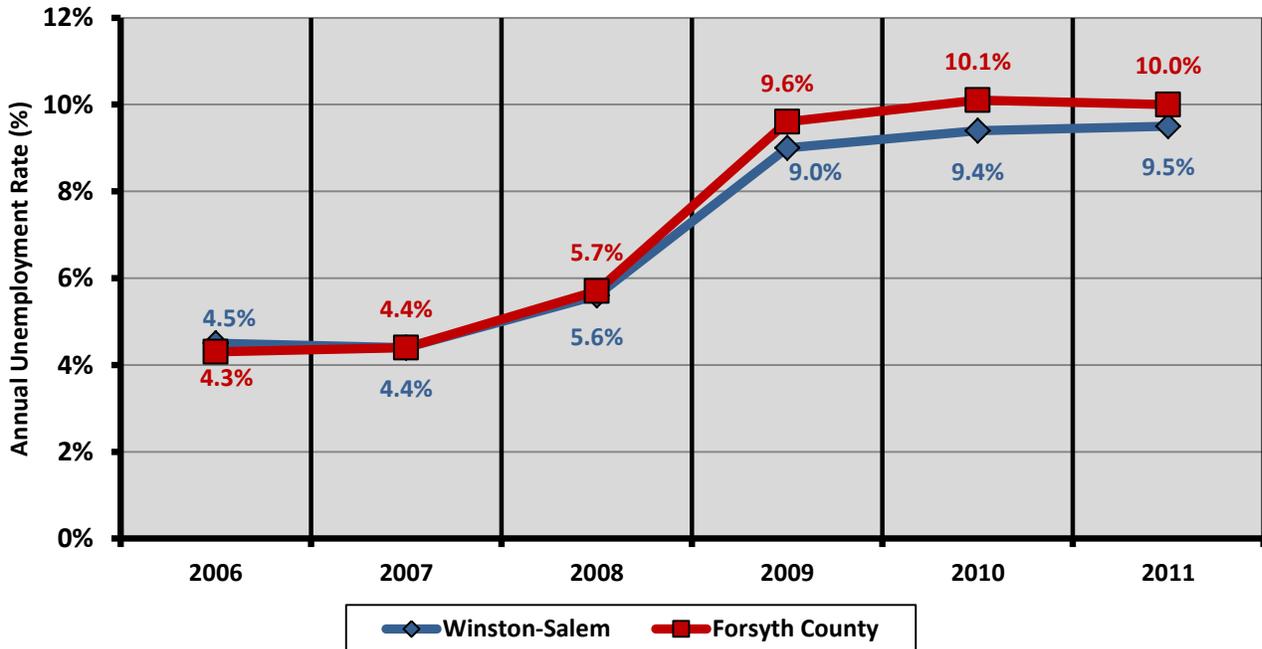
### Forsyth County Employment Change by Year (2006–2011)



Sources: North Carolina Employment Security Commission (ESC); U.S. Department of Commerce, Bureau of Economic Analysis (BEA)  
 Note: 2011 BEA data not available yet.

### Winston-Salem and Forsyth County Unemployment Rates by Year (2006–2011)

Winston-Salem and Forsyth County unemployment rates were the most favorable in 2007 at 4.4%, following three consecutive years of decline from unemployment rates of 5.9% and 5.0%, respectively, in 2004. Unemployment rates for Winston-Salem and Forsyth County increased dramatically to 9% and 10%, respectively, in 2009 and have remained in that range through 2011.

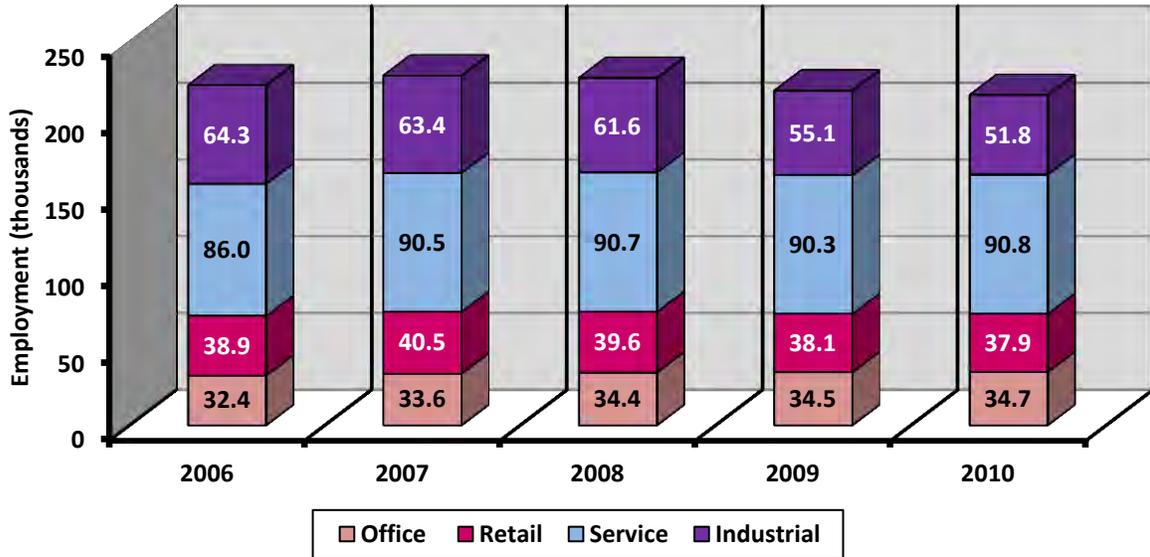


Source: U.S. Department of Labor, Bureau of Labor Statistics (BLS)

### Forsyth County Employment and Percentage Employment Change by Sector by Year (2006-2010)

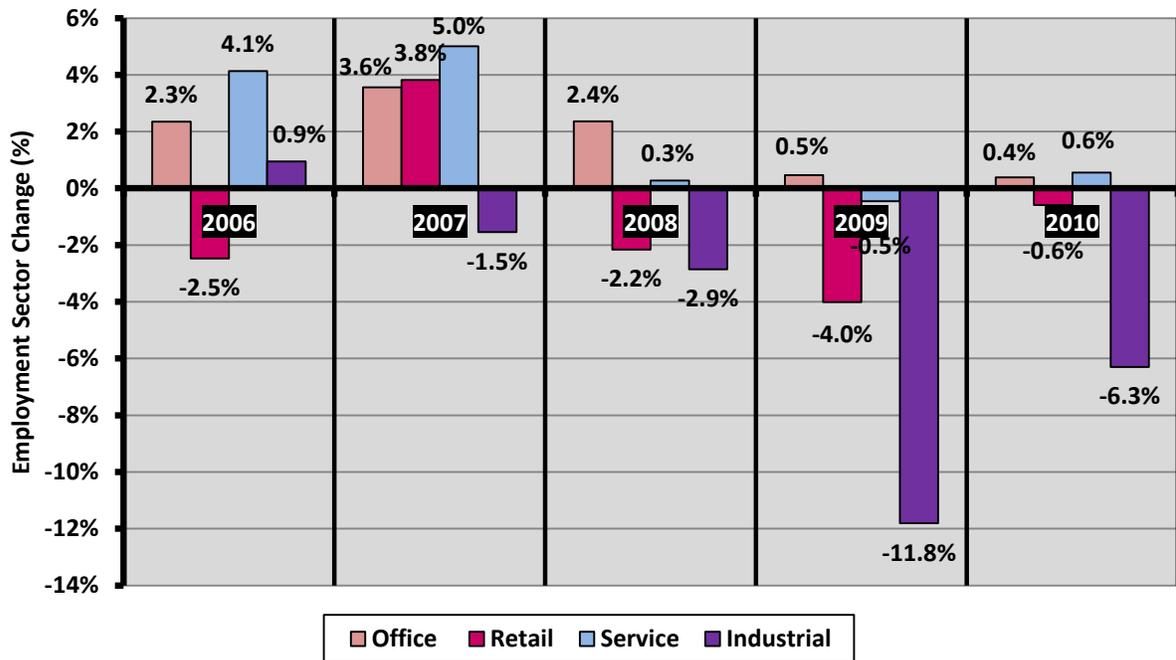
Employment has surprisingly risen by 7% in the Office sector since 2006 after being stagnate for several years. Growth in the service sector has slowed from 10% to 20% growth in the past couple of decades to 5% since 2006. The Retail and Industrial sectors continue to lose jobs with drops since 2006 of 20% in the Industrial sector and 3% in the Retail sector.

### Forsyth County Employment by Sector by Year (2006–2011)



Source: U.S. Department of Commerce, Bureau of Economic Analysis (BEA)

### Forsyth County Employment Change by Sector by Year (2006–2011)

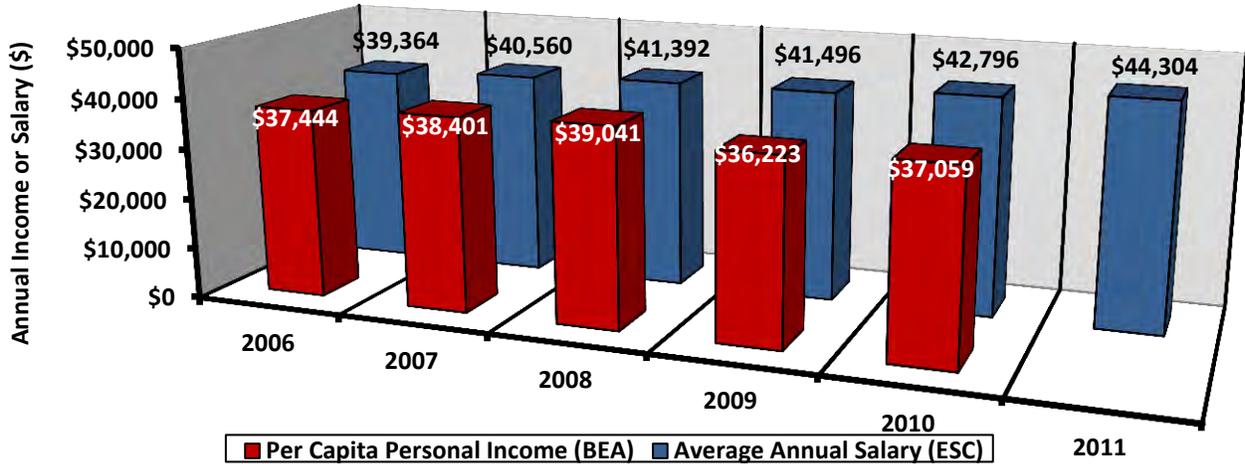


Source: U.S. Department of Commerce, Bureau of Economic Analysis (BEA)

## Salary and Income

### Forsyth County Average Salary and Per Capita Income by Year (2006–2011)

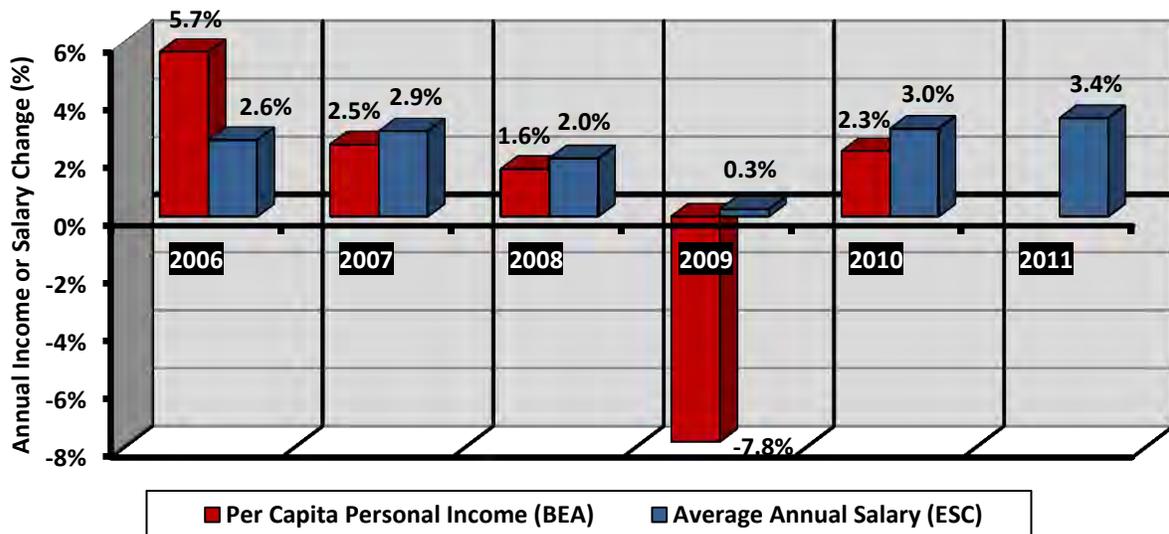
Average salaries in Forsyth County continue to increase from \$39,400 in 2006 to \$44,300 in 2011 according to the N.C. Employment Security Commission (ESC), an average increase of 2% per year. However, per capita income has decreased slightly from \$37,450 in 2006 to \$37,000 in 2010 according to the U. S. Bureau of Economic Analysis (BEA) with the greatest single year drop being \$2,800 in 2009.



Sources: North Carolina Employment Security Commission (ESC); U.S. Department of Commerce, Bureau of Economic Analysis (BEA)  
 Note: 2011 BEA data not available yet.

### Forsyth County Salary and Per Capita Income Growth by Year (2006–2011)

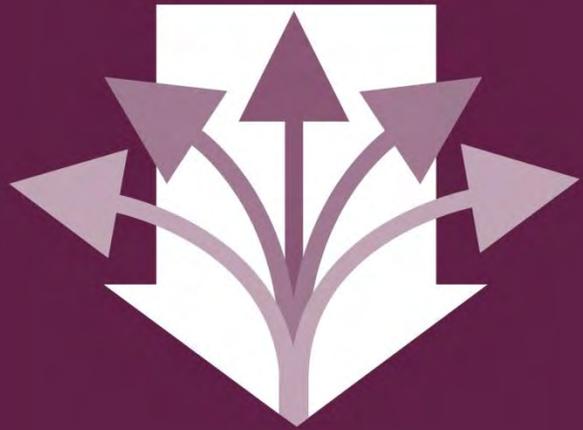
Average salaries have continued to increase by an average of 2% per year for those companies that report to the ESC. However, these salaries do not reflect job losses. Per capita income also showed an increase of about 2% each year with the exception of an 8% reduction in 2009.



Sources: North Carolina Employment Security Commission (ESC); U.S. Department of Commerce, Bureau of Economic Analysis (BEA)  
 Note: 2011 BEA data not available yet.



# County Comparisons

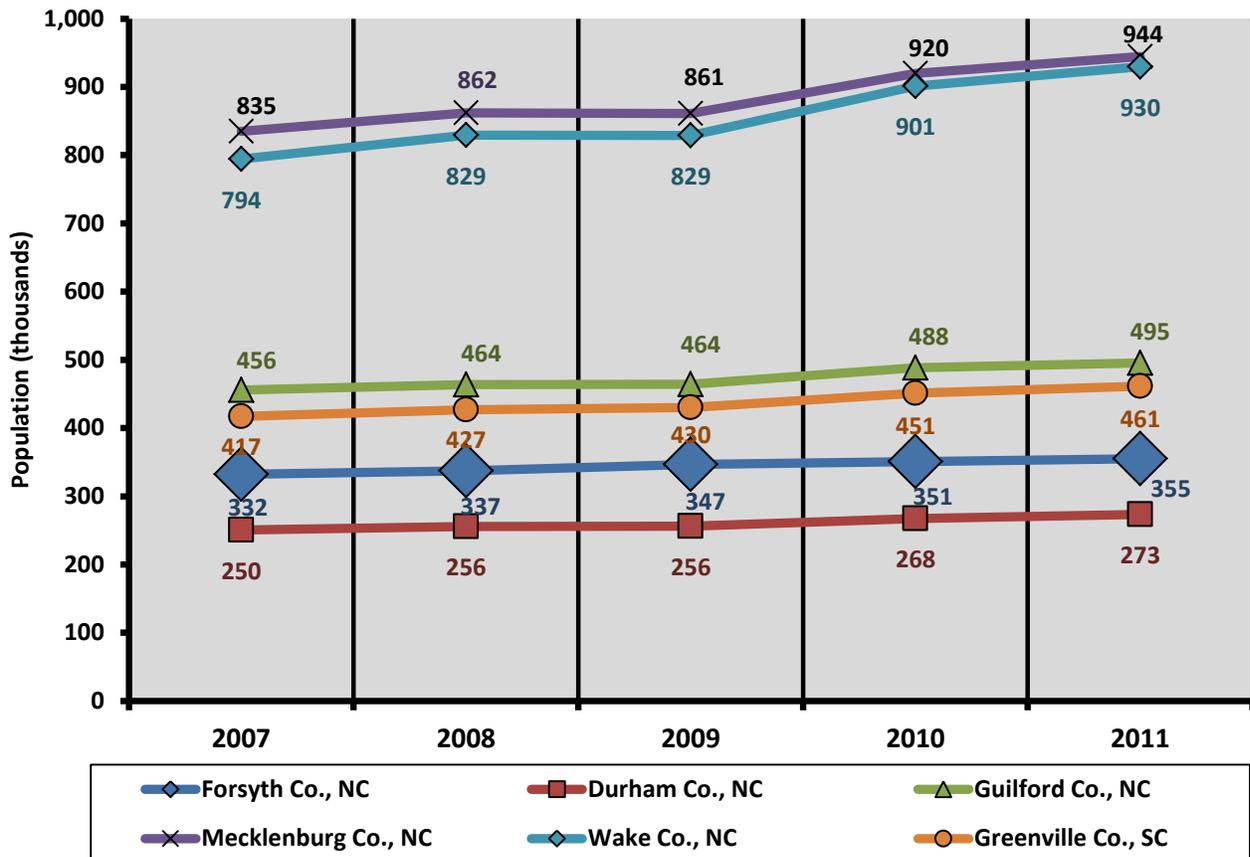


## Population Comparison with Selected North Carolina and South Carolina Counties

The following charts compare demographic measures between Forsyth County and six other counties in North Carolina and South Carolina. The selected counties and their major cities are: Guilford County, NC (Greensboro); Durham County, NC (Durham); Wake County, NC (Raleigh); Mecklenburg County, NC (Charlotte); and Greenville County, SC (Greenville).

### Selected County Population Comparisons (2007-2011)

Forsyth County's 2009 population of 355,000 ranks fifth out of the six selected counties with only Durham County having a smaller population at 273,000.

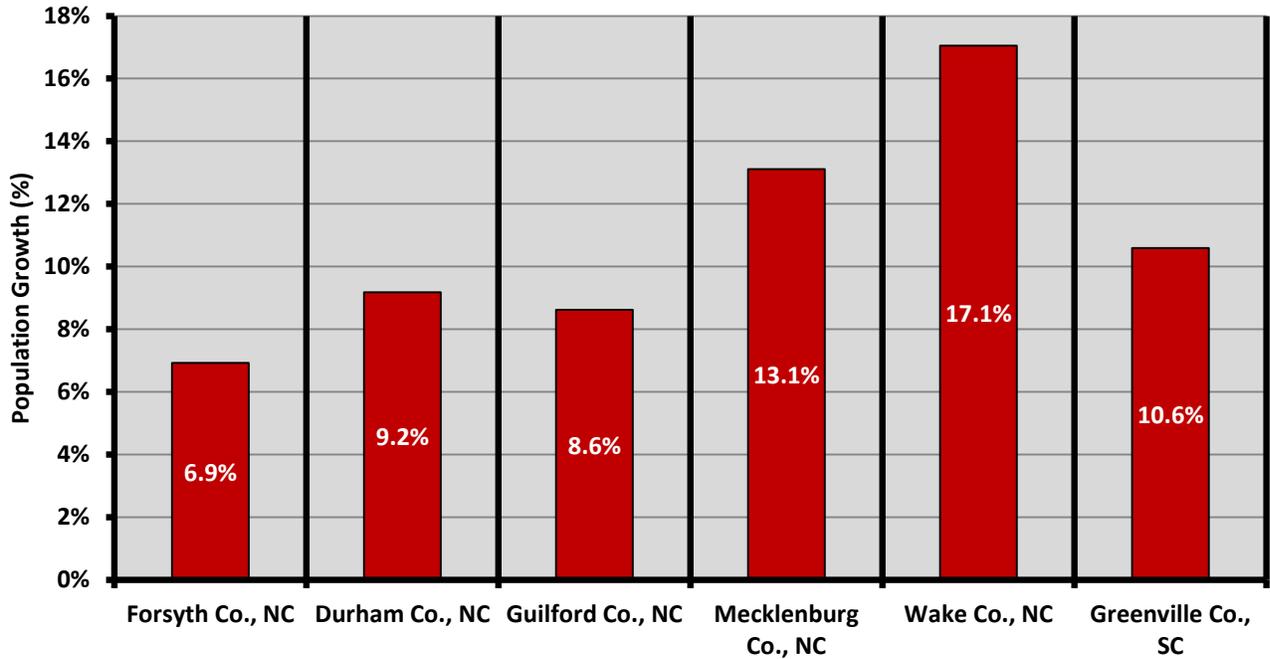


*Source: United States Census Bureau*

### Selected County Population Growth Rate Comparisons (2007-2011)

Forsyth County's population growth between 2007 and 2011 was 6.9%, slowest among the six counties, following Guilford County's growth at 8.6% and Durham County at 9.2% growth. Wake County had the highest growth rate between 2007 and 2011 with 17.1% growth. All counties are down somewhat from recent previous five-year time frames.

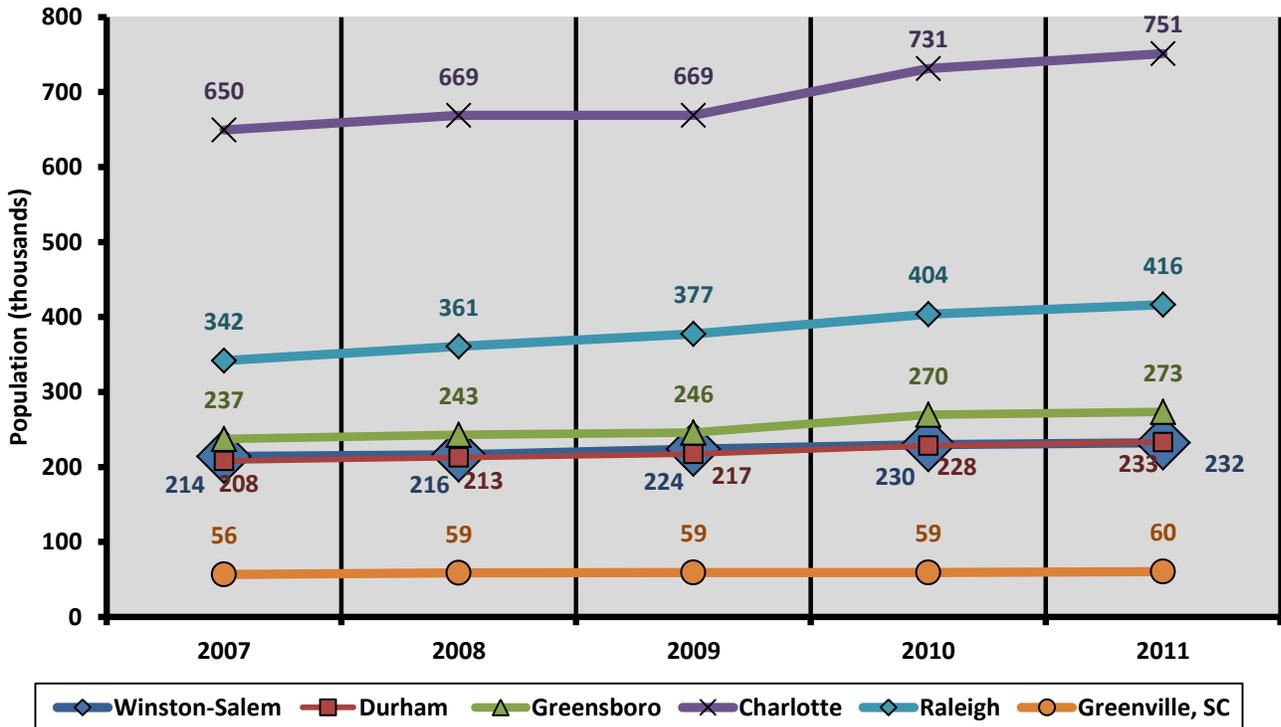
### Selected County Population Growth Rate Comparisons (2007–2011) (Continued)



Source: United States Census Bureau

### Selected Major City Population Comparisons (2007–2011)

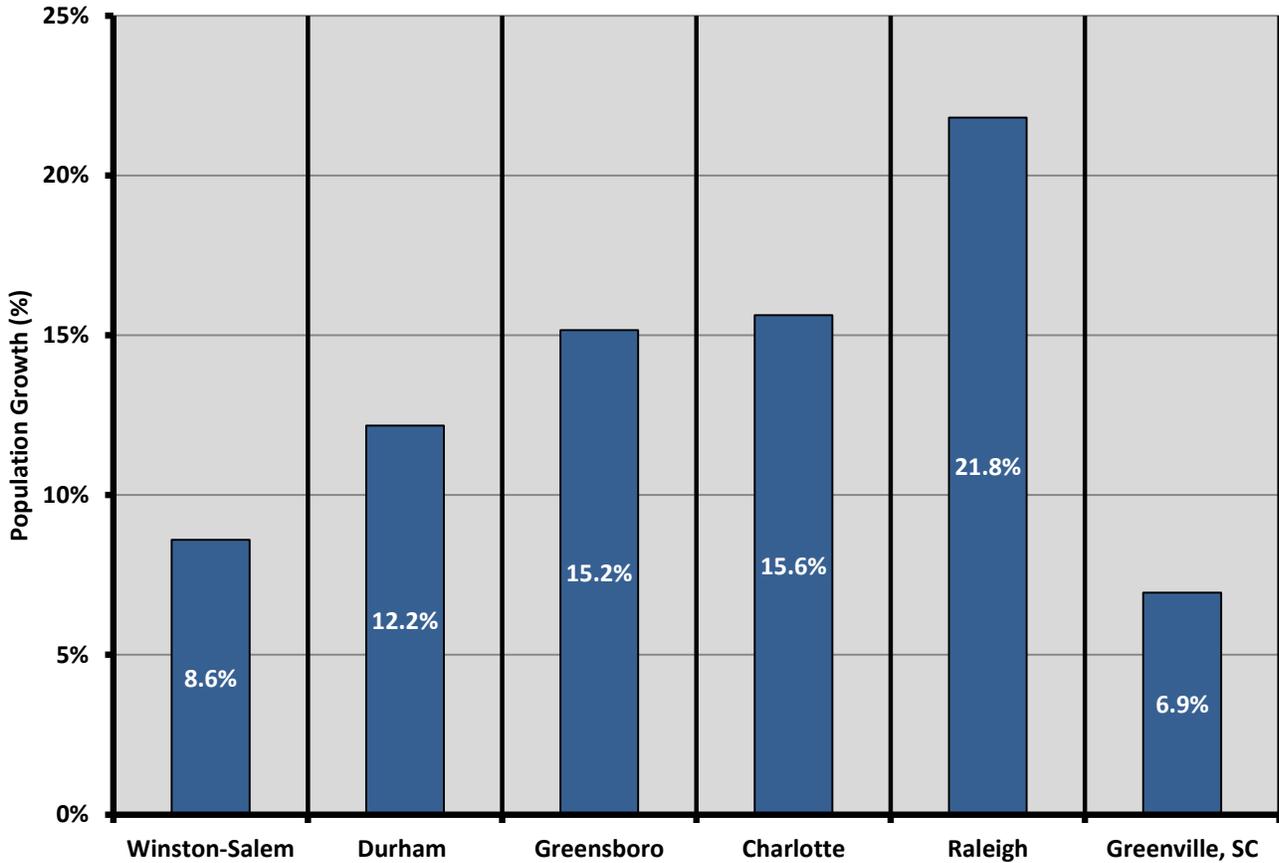
Winston-Salem ranks a close fifth in population (232,000) among the major cities in the six selected counties with Charlotte, North Carolina, having the highest 2009 population at 751,000 and Greenville, South Carolina, having the smallest population at 60,000.



Source: United States Census Bureau

### Selected Major City Population Growth Rate Comparisons (2007–2011)

Since 2007, Winston-Salem ranks fifth out of the six cities with a growth rate of 8.6%, exceeding only Greenville, South Carolina’s growth rate of 6.9%. Raleigh has the highest rate at 21.8% followed by Charlotte at 15.6% and Greensboro at 15.2%. All of the compared cities’ growth rates have tapered somewhat since 2004.



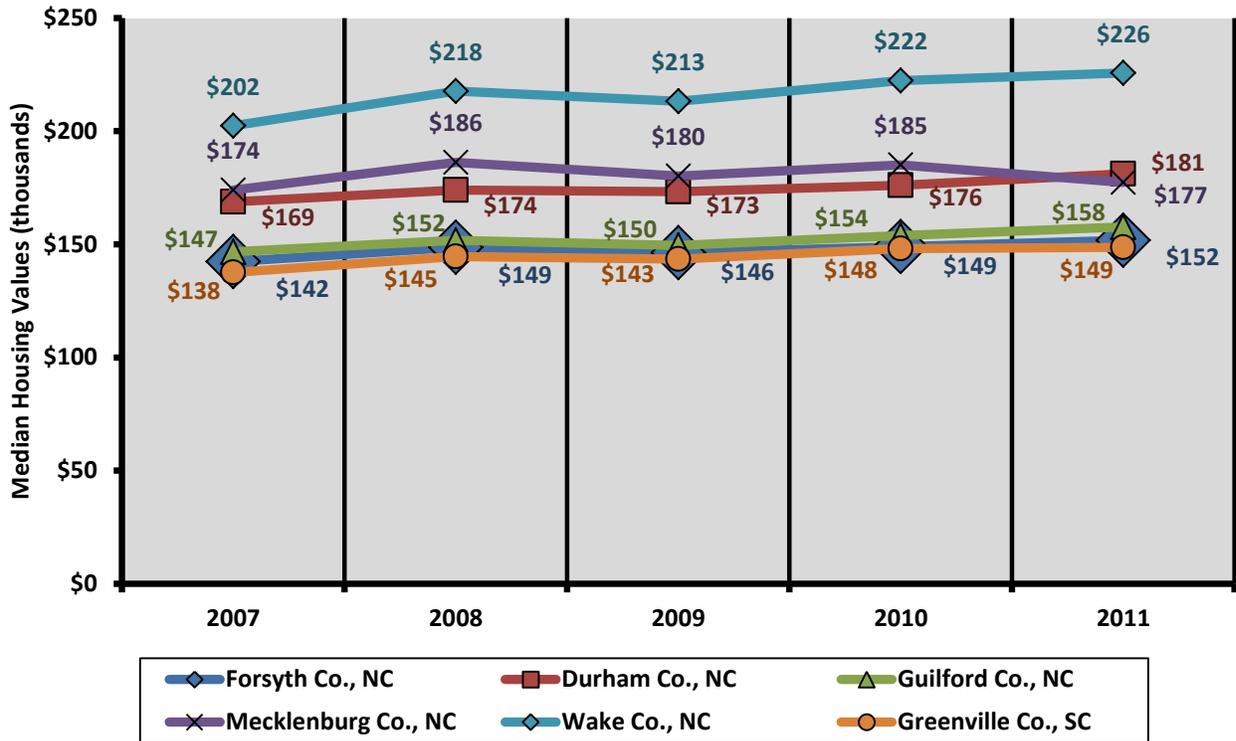
Source: United States Census Bureau

### Median Housing Value Comparison with Selected North Carolina and South Carolina Counties

#### Selected County Median Housing Value Comparisons (2007 - 2011)

Forsyth County’s 2011 median housing value of \$152,000 is second only to Greenville County, South Carolina as the most affordable county among the six selected counties. It is \$6,000 less than the median housing value for Guilford County and ranges from \$25,000 to \$30,000 less than the median values for the Mecklenberg and Durham counties, respectively, and \$75,000 less than Wake County.

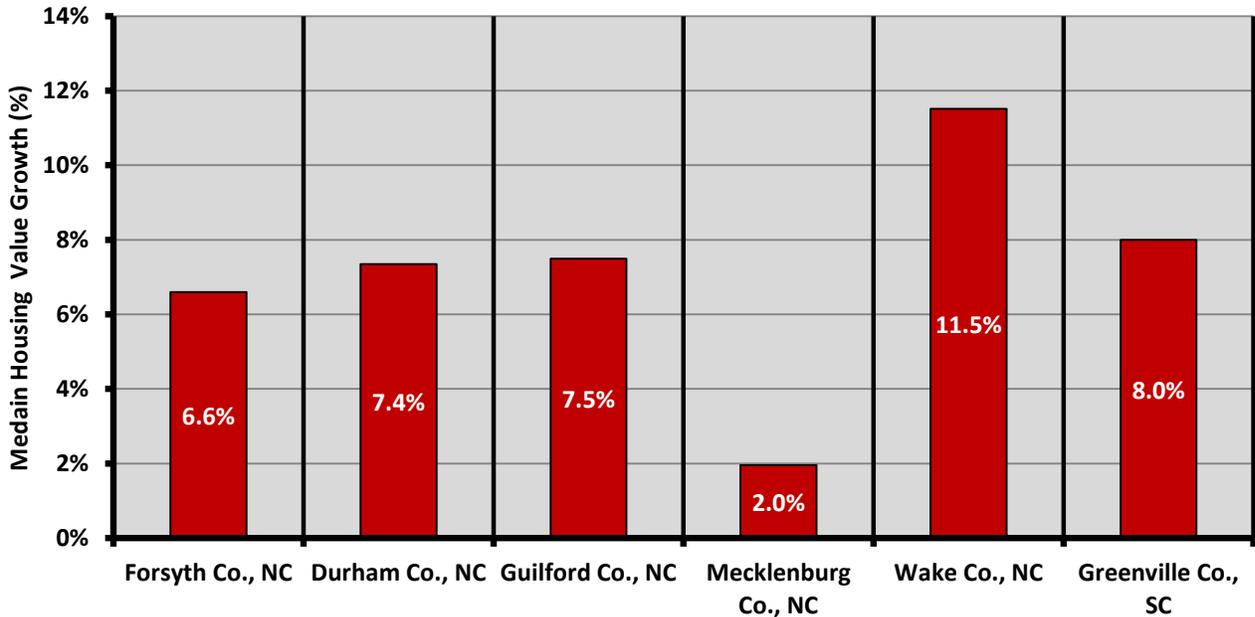
### Selected County Median Housing Value Comparisons (2007 - 2011) (Continued)



Source: United States Census Bureau

### Selected County Median Housing Value Growth Rate Comparisons (2007-2011)

Forsyth County's growth in median housing value between 2007 and 2011 was the fifth slowest at 6.6% (as compared to 19% between years 2004-2009), ahead of only Mecklenburg County at 2.0%, which had a 4.2% reduction in housing values between 2010 and 2011. Wake County had the fastest growth in median housing value between 2007 and 2011 at 11.5%.

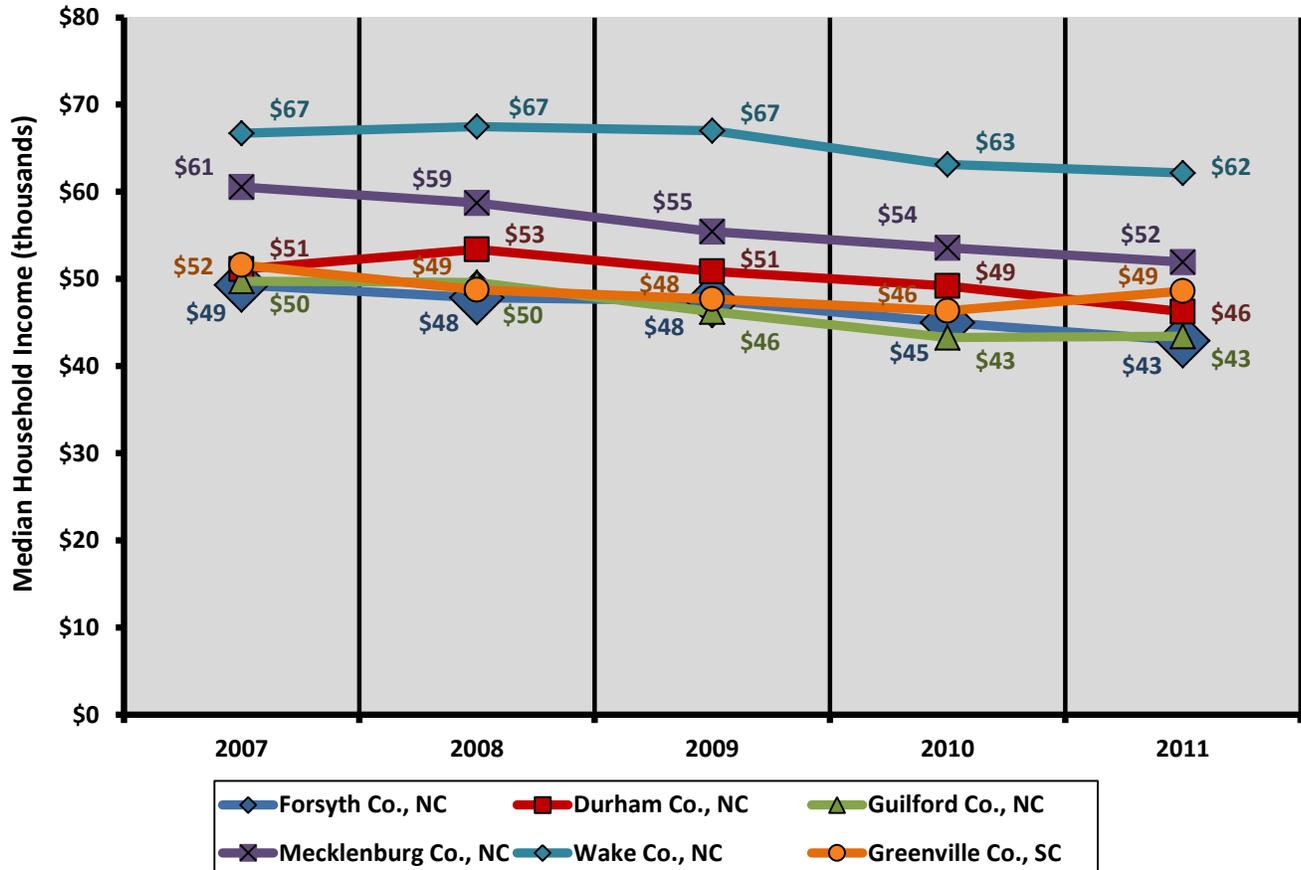


Source: United States Census Bureau

## Median Household Income Comparison with Selected North Carolina and South Carolina Counties

### Selected County Median Household Income Comparisons (2007-2011)

Forsyth County is tied with Guilford County for the lowest 2011 median household income among the six selected counties at \$43,000, dropping from fourth place in 2009 when the county's median household income was \$48,000. Five of the six counties have similar median incomes between \$43,000 and \$52,000 per household, with Wake County having a higher median income at \$62,000 per household.

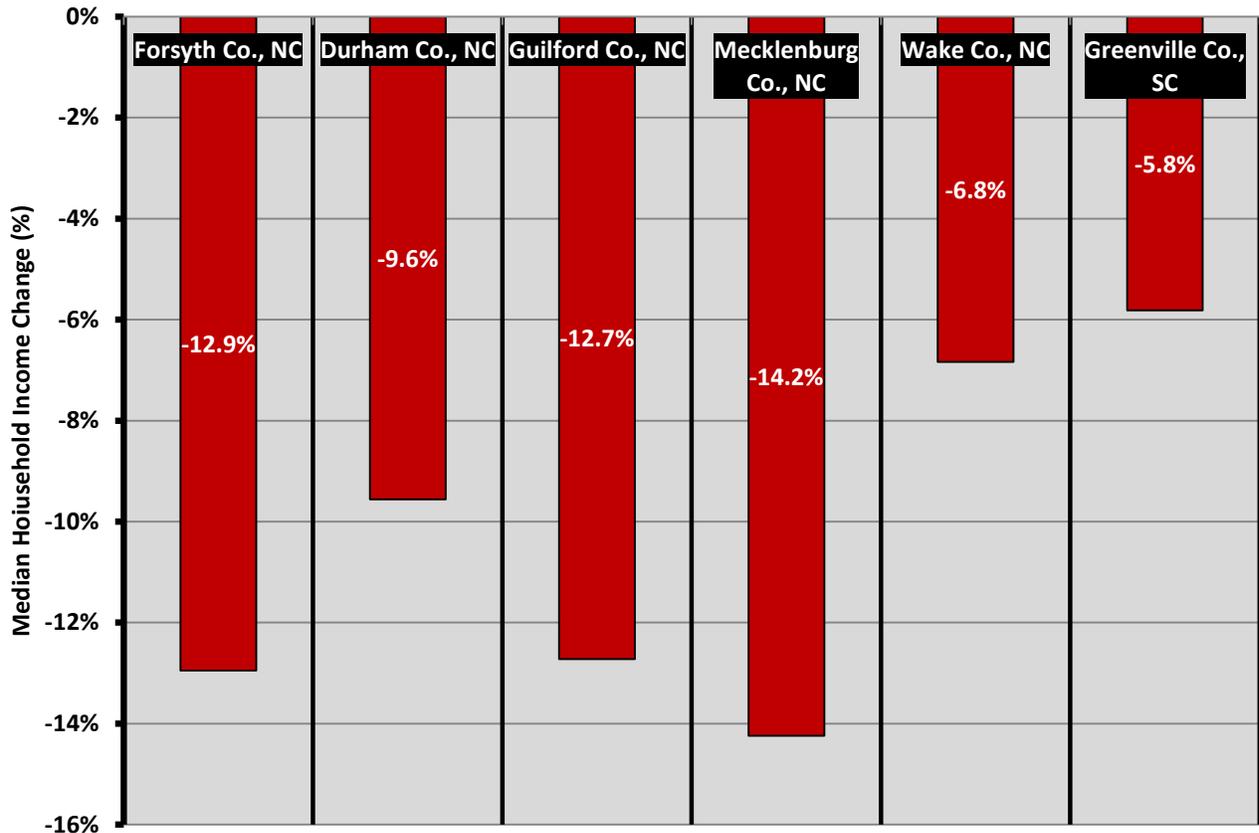


*Source: United States Census Bureau*

### Selected County Median Household Income Change Rate Comparisons (2007-2011)

Forsyth County changed from having the second highest growth rate in median household income between 2003 and 2008 (+24%) to having the second highest loss rate in median household income between 2007 and 2011 (-12.9%). Only Mecklenburg County had a faster drop rate in median income between 2007 and 2011 at 14.2%. The two counties that had the slowest reduction in median household income between 2007 and 2011 were Greenville, SC (-5.8%) and Wake (-6.8%) counties, respectively.

**Selected County Median Household Income Change Rate Comparisons (2007-2011)  
(Continued)**



Source: United States Census Bureau

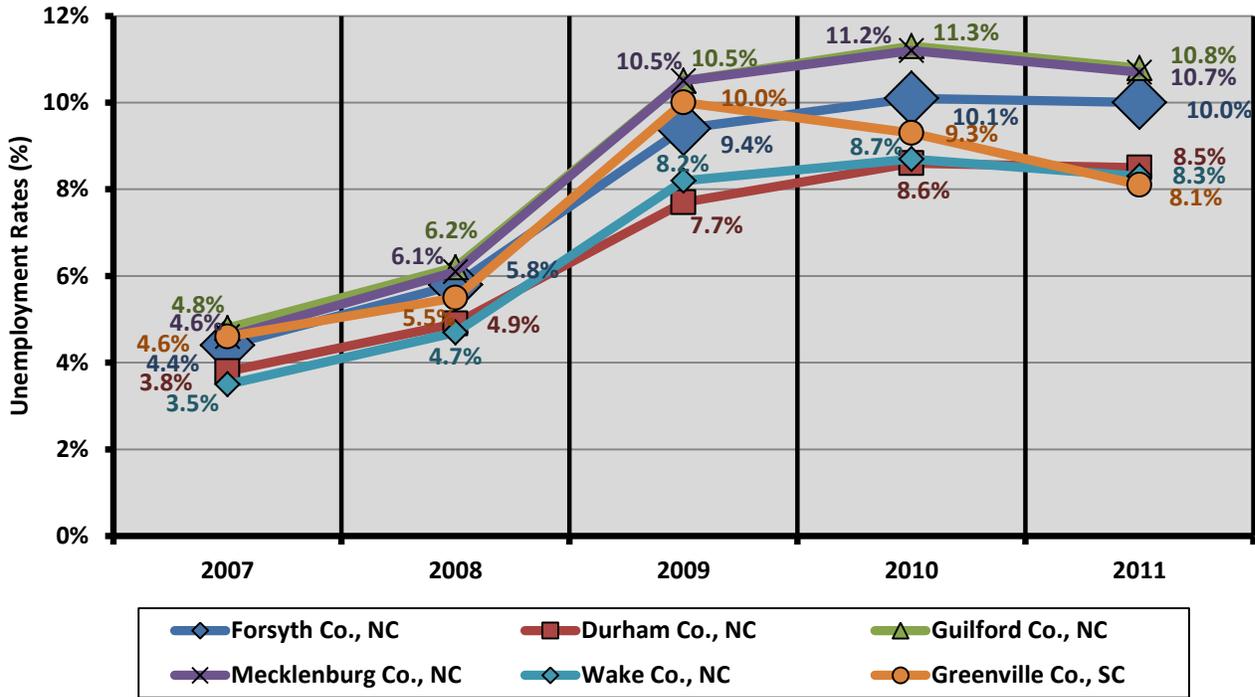
**Unemployment Rate Comparison  
with Selected North Carolina and South Carolina Counties**

**Selected County Unemployment Rate Comparisons (2007-2011)**

When examining unemployment rates between 2007 and 2011, Forsyth County has generally fared better than some of the other selected counties except for Wake and Durham counties in North Carolina's Research Triangle. In 2007, all counties had an unemployment rate of less than 5% with Wake and Durham counties having a rate less than 4%. In 2008, unemployment rates started to rise to 5% to 7% as the Great Recession was beginning.

The Great Recession hit hard in 2009 when unemployment rates for all counties skyrocketed by 3% to 5% in one year. Three of the six counties (Guilford, Mecklenburg and Greenville) had rates exceeding 10%. Interestingly, Forsyth County's unemployment rate was less than Guilford County's in all of the past eight years. In 2010, all counties had unemployment rates greater than 8% with Forsyth County becoming the fourth county to exceed 10%. Unemployment rates have dropped slightly in 2011 with no county exceeding an 11% unemployment rate and no county with less than 8% unemployment.

### Selected County Unemployment Rate Comparisons (2007-2011) (Continued)

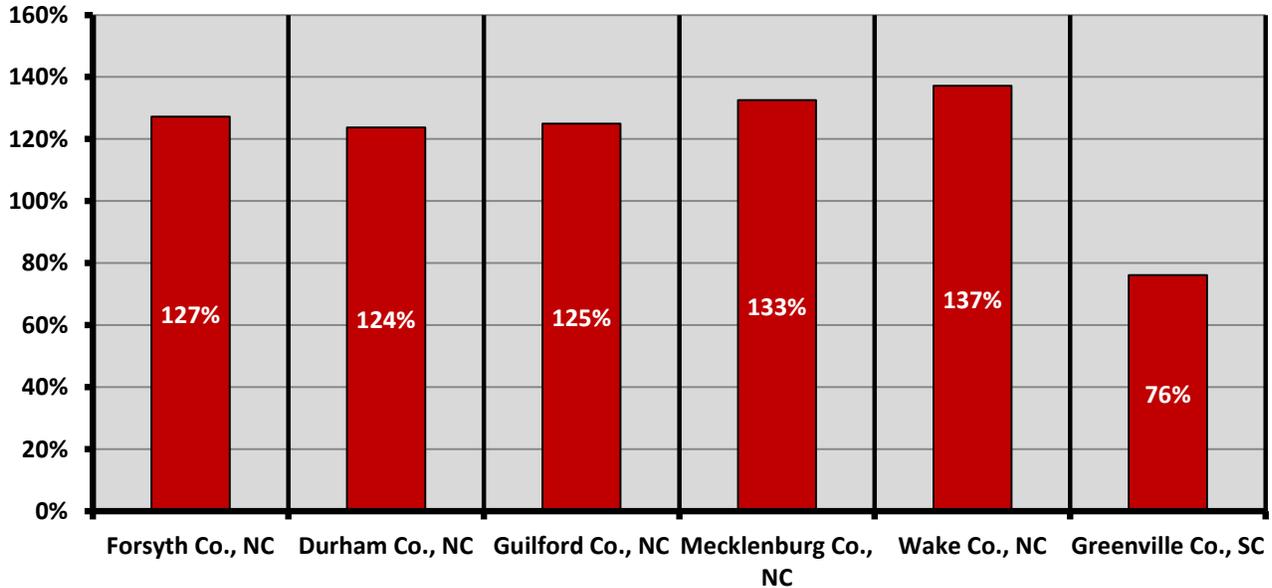


Source: U.S. Department of Labor, Bureau of Labor Statistics (BLS)

### Selected County Unemployment Rate Changes (2007-2011)

Due to the Great Recession, unemployment rate changes between 2007 and 2011 were greater than 100% for every county but Greenville County, South Carolina which only increased by 76%.

Unemployment growth between 2008 and 2009 increased dramatically for all six counties ranging between 65% and 82%. Forsyth County had the second lowest increase between 2008 and 2009 at 70%, reflecting its somewhat more stable employment environment relative to similar counties.



Source: U.S. Department of Labor, Bureau of Labor Statistics (BLS)

# Acknowledgements

## City-County Planning Board

**Arnold G. King, Chair**  
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**City Manager:** Lee Garrity

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**County Manager:** J. Dudley Watts, Jr.

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\* Project Leader

**2011**  
**Forsyth County**  
**Trends and Development**  
**Patterns**

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