2013 Forsyth County Trends

Introduction

Welcome to the *2013 Forsyth County Trends Report*. The primary purposes of this report are to provide population trends for Forsyth County and its communities and to show residential and nonresidential construction trends for the county (including Kernersville) based upon building permits issued between 2009 and 2013.

New to the *2013 Forsyth County Trends* Report are population trends for the Piedmont Triad region, migration trends data for Forsyth and Guilford counties and transportation, economic and health trends to provide empirical data support to trends stated in *The Legacy 2030 Update*, the county's 20-year comprehensive plan, adopted by all local governments in Forsyth County in late 2012 and early 2013. The *2013 Trends Report* tries to minimize the replication of Forsyth County information found in other sources.

At the end of the *2013 Trends Report*, selected data from the 2010 decennial census and the 2012 American Community Survey of the US Census Bureau were broken into block groups and recompiled to provide data profiles all 20 individual area plan boundaries, the three rural areas and the portions of High Point and King located in Forsyth County. The profiles show population change between 2000 and 2010, population density, and number of units in individual structures, education levels and the percentages of owner-occupied and renter-occupied units.

The trends 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. Websites from which data was obtained are listed for most graphs in the report.

This report makes use of data from a variety of sources and time-frames including:

the United States Census Bureau, the Internal Revenue Service, the Center for Neighborhood Technology, North Carolina Employment Security Commission (ESC), the State Demographics Branch of the North Carolina Office of State Budget and Management (OSBM), the Bureau of Economic Analysis (BEA) and the Economic Development Administration (EDA) of the United States Department of Commerce, the Brookings Institute, the United States Patent and Trademark Office, the Centers for Disease Control and Prevention (CDC), the Kernersville Planning and Community Development Department, the Forsyth County Environmental Health Department, the Forsyth County Tax Department and the Winston-Salem/Forsyth County Planning and Development Services Department.

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

Please contact the Planning and Development Services Department by telephone at 336-727-8000, or by email at planning@cityofws.org regarding any inquiries about the report.

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Rock the Block
Photograph: Forsyth County

Sources used for determining Housing and Transportation Costs for the H + T Affordability Index for the Housing and Transportation Costs charts found on pages 23 and 24:

Housing costs are derived directly from nationally available datasets. Median Selected Monthly Owner Costs and Median Gross Rent, both from the 2009 American Community Survey 5-year Estimates (ACS), are averaged and weighted by the ratio of owner- to renter-occupied housing units from the Tenure variable for every block group in the 877 Core-Based Statistical Areas (CBSAs).

The 2007 edition of the America Automobile Association's (AAA) Your Driving Costs report serves as the basis for the auto ownership cost component. AAA reports an average ownership cost per year composed of full-coverage insurance, license, registration and taxes, depreciation, and finance charges. The 2007 Your Driving Costs report also serves as the basis for the auto use cost component. AAA reports an average operating cost per mile (composed of gas, maintenance, and tires). The gas component of AAA's operating costs is subtracted and replaced with regional fuel costs from the Energy Information Administration (EIA) to account for regional variation in gas prices.

The 2007 National Transit Database (NTD) served as the source for transit cost data. Specifically, directly operated and purchased transportation revenue were used (demand response revenue was not factored into this analysis). The transit revenue was assigned to each of the transit agencies where GTFS data were collected. The allocation of transit revenue to the metropolitan level was then based on the percentage of each transit agencies' bus and rail stations within the primary versus surrounding metropolitan areas.

Please refer to the Housing + Transportation Affordability website below for more detailed information.

www/htaindex.org

Source: The Center for Neighborhood Technology Housing + Transportation (H+T®) Affordability Index

Population Trends

Forsyth County and its Communities' Population Trends

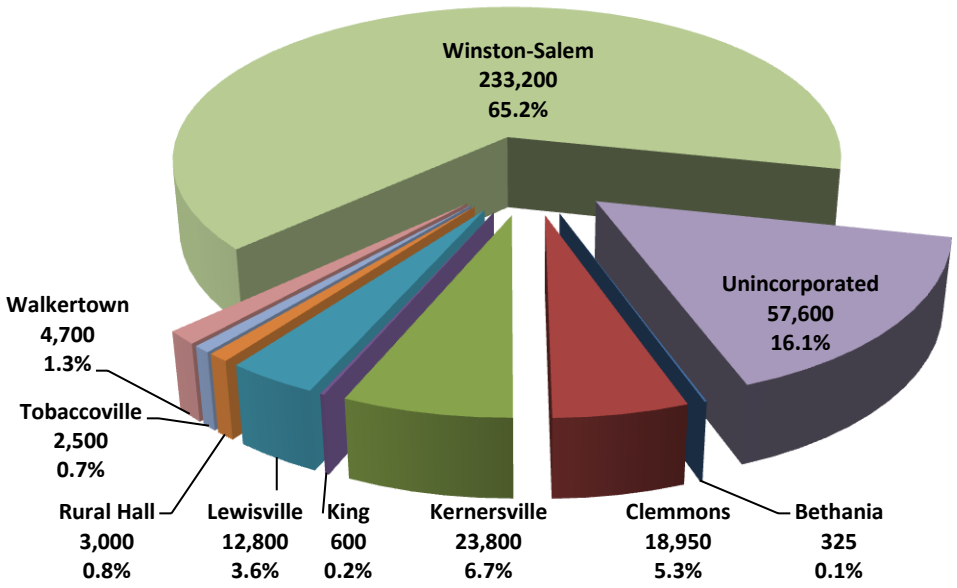
The Legacy 2030 Update states that Forsyth County and its municipalities continue to grow faster than projected, but that this growth for the past several decades has been in the form of fairly low-density development with communities often growing by more acreage than population.

Trends:

- Forsyth County and its larger cities and towns continue to grow (pp. 6-7).
- Smaller communities are maintaining populations despite slight downward adjustments from 2009 projections by the State Demographics Branch of the Office of State Budget and Management (OSBM), due to actual 2010 US Census counts (p. 6).
- Community population densities are increasing slightly or remaining stable because municipality land areas are not likely to increase significantly due to recently enacted annexation statutes, making it more difficult for municipalities to annex additional lands (p. 8).

Forsyth County Community Populations (2012)

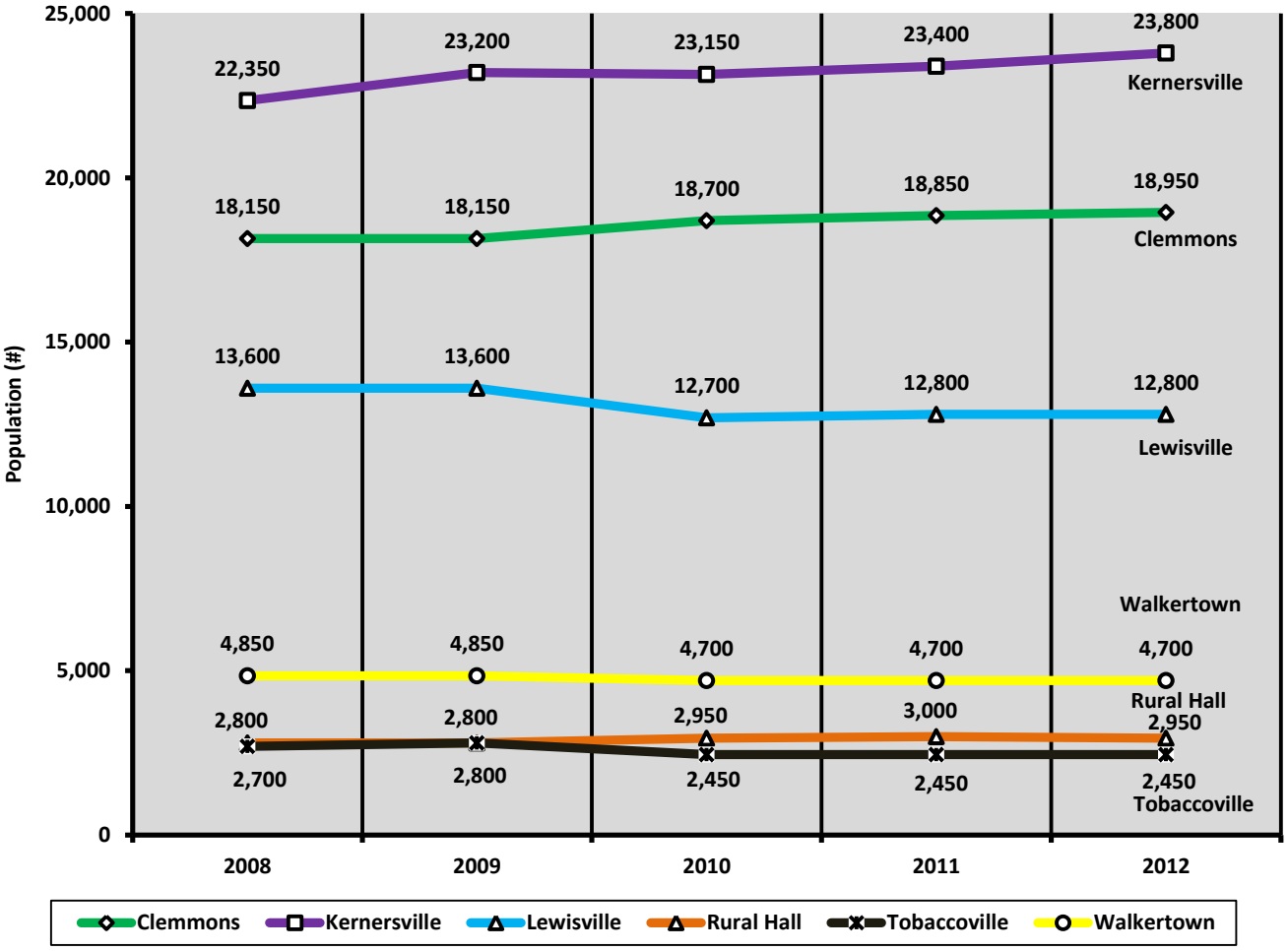
The proportionate population of Winston-Salem, the other incorporated communities in Forsyth County and the unincorporated portion of Forsyth County have remained unchanged since 2011: Winston-Salem at 65%, incorporated communities totaling 19% and the unincorporated areas population of Forsyth County remaining at 16%.



Source: NC Office of State Budget and Management (OSBM), State Demographics Branch
www.osbm.state.nc.us/ncosbm/facts_and_figures/socioeconomic_data/population_estimates.shtm

Forsyth County Perimeter Community Population by Year (2008–2012)

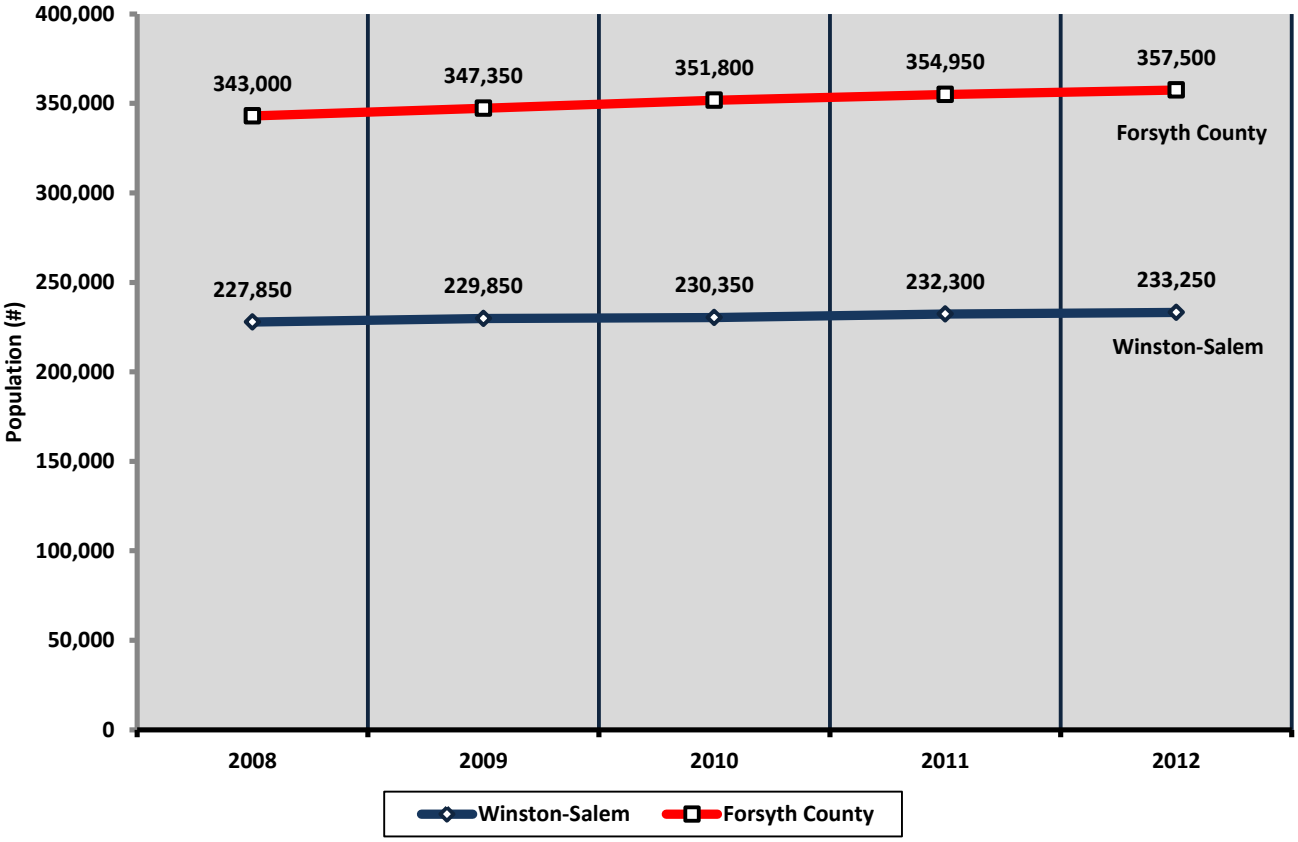
Forsyth County's perimeter communities are segregated into two groups with regard to population. Kernersville, Clemmons and Lewisville have populations greater than 10,000 while Walkertown, Rural Hall and Tobaccoville have populations less than 5,000. Lewisville, Walkertown and Tobaccoville have negative growth rates because State projections for 2008 and 2009 exceeded the actual 2010 Census populations. The fastest growing community between 2008 and 2012 was Kernersville at 6.5%.



Source: NC Office of State Budget and Management (OSBM), State Demographics Branch
www.osbm.state.nc.us/ncosbm/facts_and_figures/socioeconomic_data/population_estimates.shtm

Winston-Salem and Forsyth County Population by Year (2008-2012)

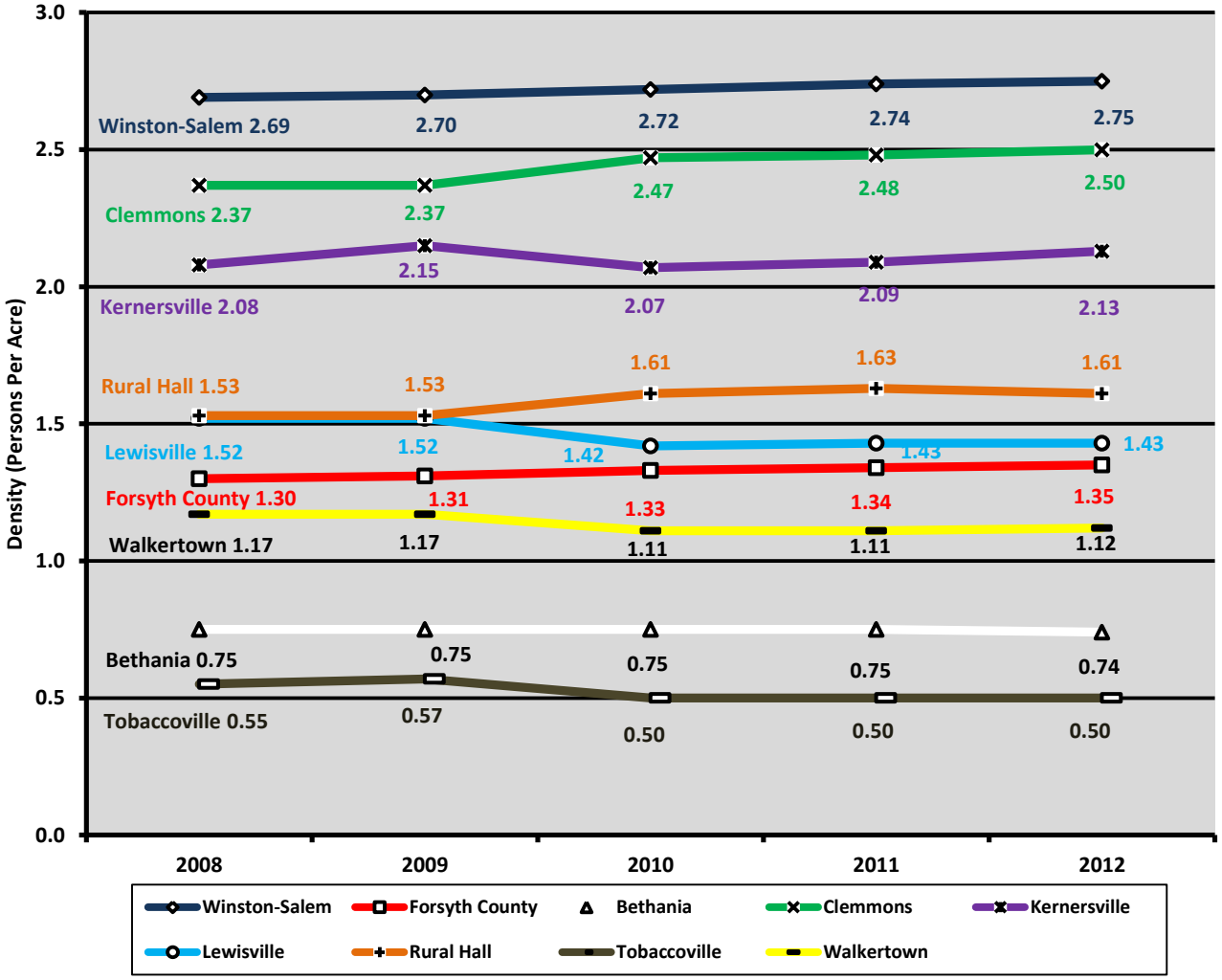
Between 2008 and 2012, Winston-Salem's population grew by 2.4% from 227,850 to 233,250 while Forsyth County's population grew by 4.2% from 343,000 to 357,500.



Source: NC Office of State Budget and Management (OSBM), State Demographics Branch
www.osbm.state.nc.us/ncosbm/facts_and_figures/socioeconomic_data/population_estimates.shtm

Forsyth County Population Density by Community (2008-2012)

Most of the communities in Forsyth County stayed fairly constant in population density between 2008 and 2012. Some communities had a decrease in population density in 2010 when Census populations were less than 2009 projected populations. Winston-Salem has the highest density at 2.75 persons per acre with Tobaccoville having the lowest density at 0.50 persons per acre.



Source: NC Office of State Budget and Management (OSBM), State Demographics Branch
www.osbm.state.nc.us/ncosbm/facts_and_figures/socioeconomic_data/population_estimates.shtm

Piedmont Triad Regional Population Trends

Forsyth County can no longer evaluate its future without examining its regional context in the Piedmont Triad—defined as the eleven-county region used by the Piedmont Triad Partnership (see Map 1 below). The *Legacy 2030 Update* states that Guilford County and Forsyth County function as the urban center for the 11-county Piedmont Triad region. From a regional perspective, Alamance, Randolph, Davidson, Davie, Yadkin, Surry, and Rockingham can be considered as the prime suburban areas while Yadkin, Stokes and Caswell counties can be considered as the outlying rural areas.

Map 1: Piedmont Triad Region
Source: Piedmont Triad Partnership
www.piedmonttriadnc.com/landing.html

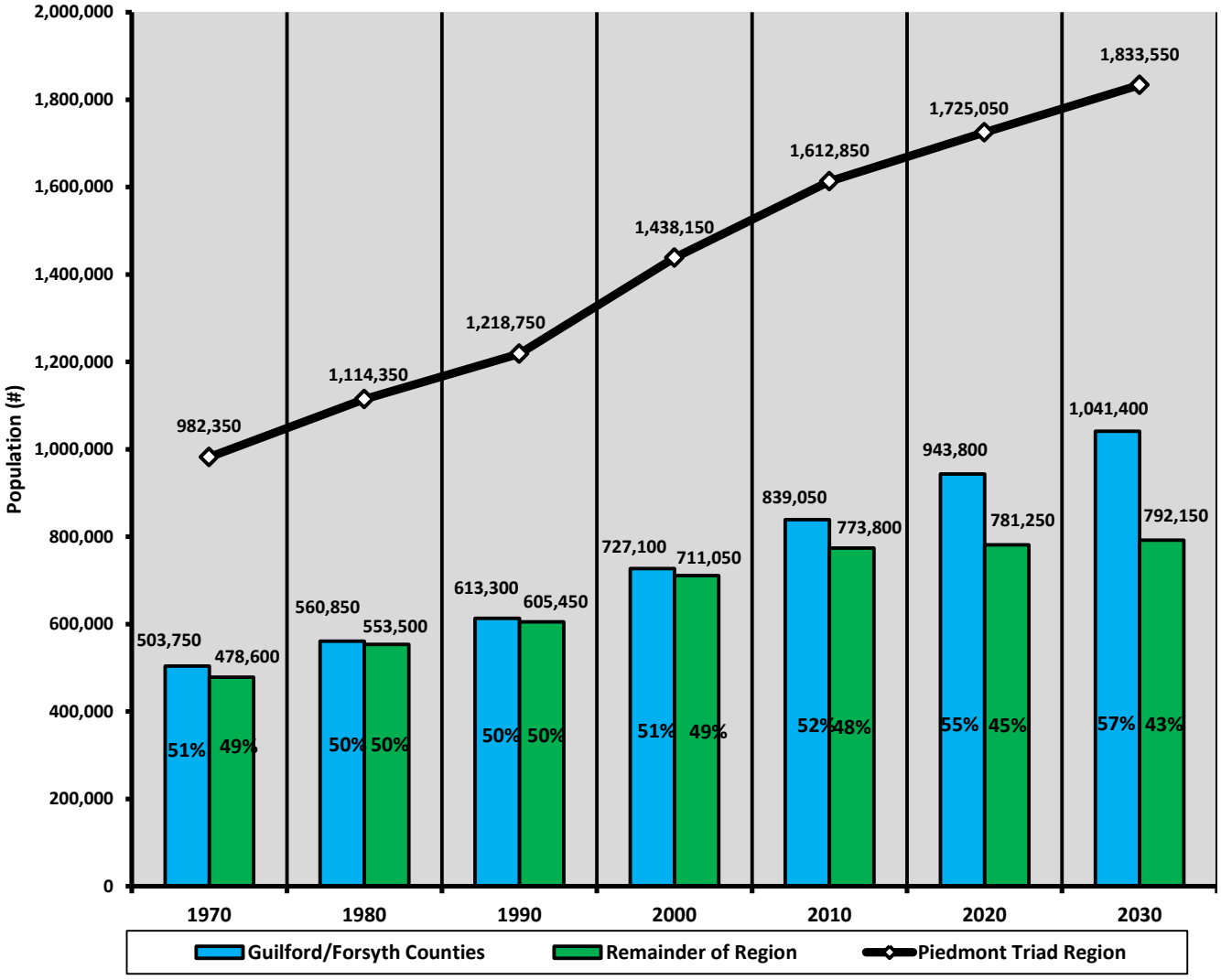
Trends:

- The Piedmont Triad region has grown by nearly two-thirds in population since 1970, from just under 1 million to 1.6 million people. The two anchor counties for the Piedmont Triad region, Guilford and Forsyth, are projected by the OSBM, State Demographics Branch to increase their portion of the region's population from their traditional 50% since 1970 to 57% by 2030
  (p. 11).
- The daytime populations of Greensboro and Winston-Salem increase by one-quarter and one-fifth, respectively, drawing commuters from elsewhere in the region primarily for employment and education (p. 13).
- Between 2005 and 2010, the average net population gain each year from migration is 1,950 people for Guilford County and 1,300 people for Forsyth County. Though the net gain is modest, an average of 33,700 and 15,500 people moved into Guilford and Forsyth counties, respectively, each year either from other North Carolina counties or from other states, equivalent to 4.5 percent of each city's total population (p. 15).
- Most of the net population gain is from people moving into Guilford or Forsyth counties from out-of-state, as the net population loss to each county from other counties in North Carolina is around 500 people (p. 15).
- The most active out-of-state moving origins or destinations for Forsyth County residents are: Greater New York City, Greater Washington, DC, Greater Atlanta, Greater Miami and Greater Los Angeles (p. 16).
- The most active in-state counties as a moving origin or destination for Forsyth County residents are: Guilford County, Davidson County, Stokes County, Mecklenburg County and Davie County (p. 18).

Innovation Quarter—Winston-Salem, NC
Photograph: Business Facilities.com

Piedmont Triad Population Estimates and Projections (1970-2030)

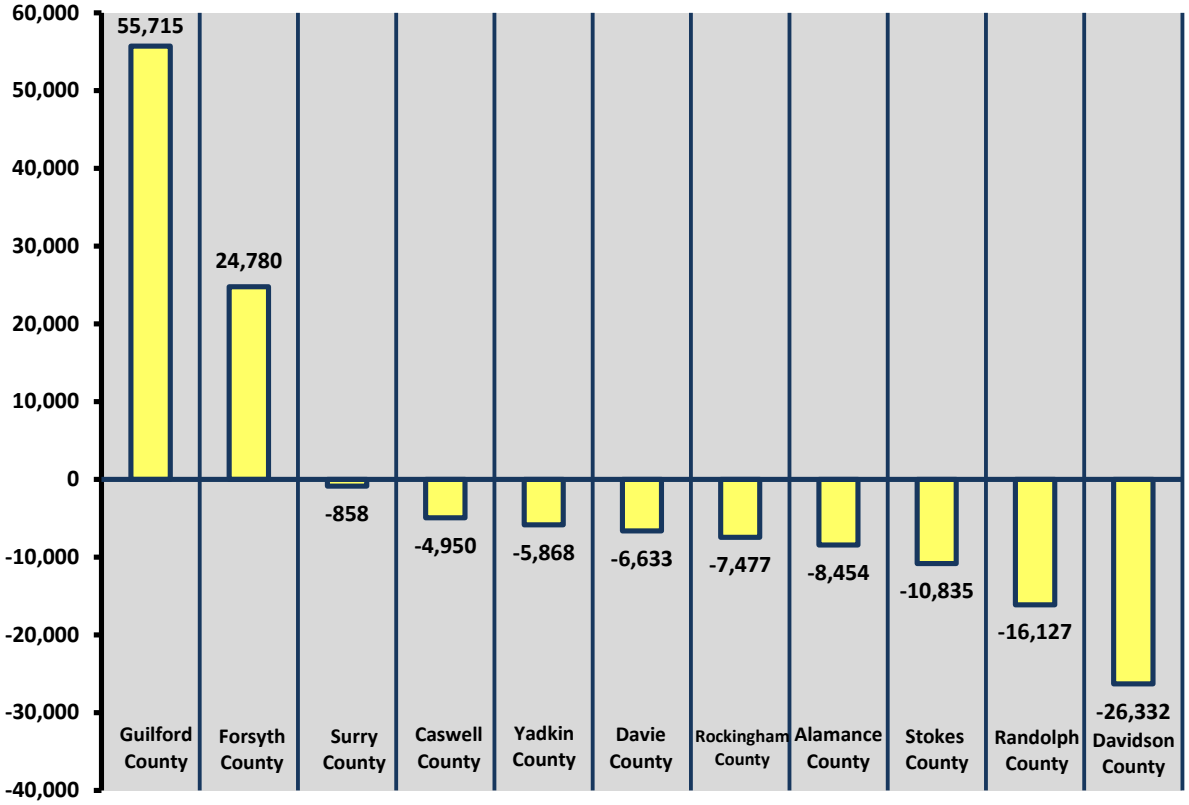
The Piedmont Triad Region has grown by nearly two-thirds in population since 1970, from just under 1 million to 1.6 million people. In 2030, the region's population is projected by the OSBM, State Demographics Branch to increase by 14% to more than 1.8 million people. Meanwhile, the anchor counties of the region, Guilford and Forsyth counties, have grown in population at a slightly faster rate than the remainder of the region. In 1980, Guilford and Forsyth counties accounted for 50% of the region's population while in 2010 the two counties account for 52% of the region's population. This trend is expected to continue so that Guilford and Forsyth County are projected to combine for more than 1 million in population by 2030, 57% of the region's population.



Source: NC Office of State Budget and Management (OSBM), State Demographics Branch
www.osbm.state.nc.us/ncosbm/facts_and_figures/socioeconomic_data/population_estimates.shtm

Piedmont Triad Daytime Commuter Population Change (2010)

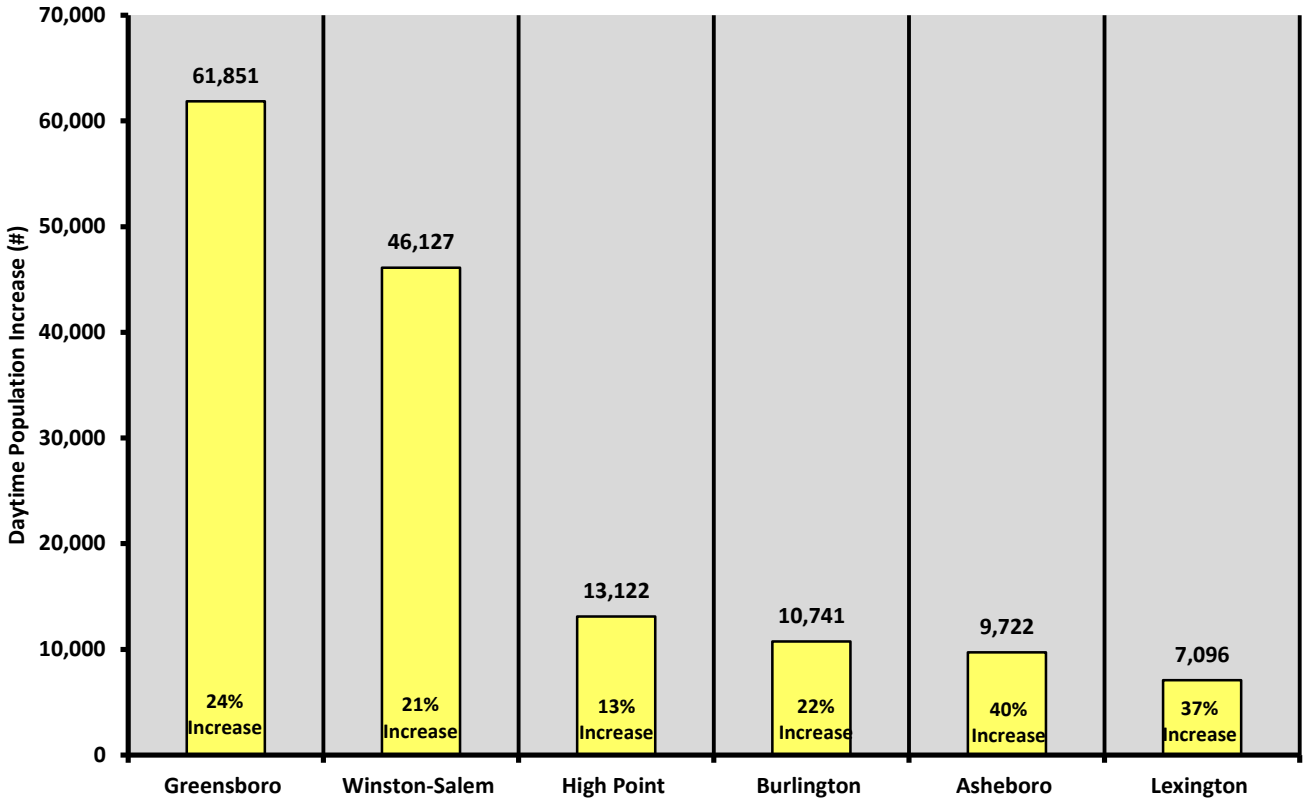
The daytime populations of all of Guilford and Forsyth counties increase by 12% and 7%, respectively, reflecting that these counties are the employment and education centers for the region. The other nine counties have a reduction in population during the day ranging from 858 people for Surry County to more than 26,000 people for Davidson County.



Source: US Census Bureau, American Community Survey 2006-2010 5-year estimates, Commuting (Journey to Work), Commuter Adjusted Daytime Population
www.census.gov/hhes/commuting/

Piedmont Triad Daytime Commuter Population Changes (2010)

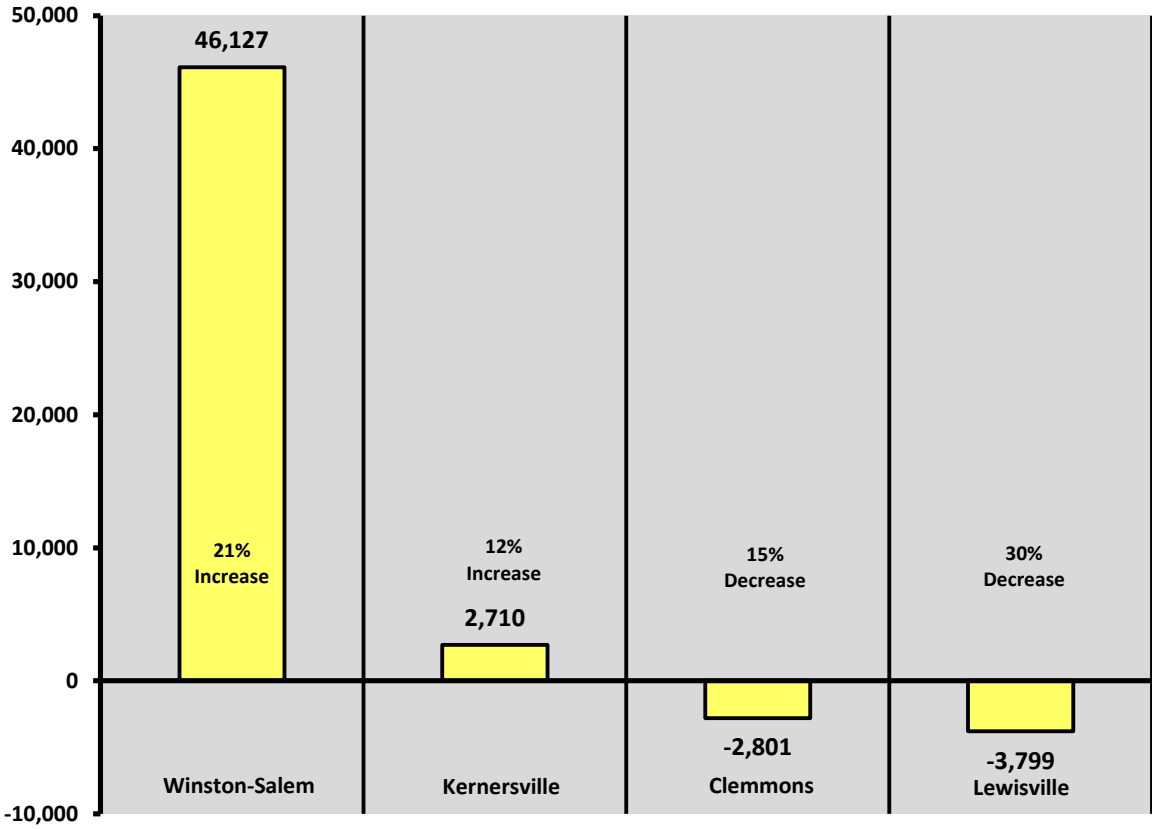
The daytime population increases for the cities of Greensboro and Winston-Salem are greater than the increase in their respective county populations (61,851 vs. 55,715 and 46,127 vs. 24,780). The cities of High Point, Burlington, Asheboro and Lexington experience the next highest growth in daytime population with increases between 7,096 and 13,122.



Source: US Census Bureau, American Community Survey 2006-2010 5-year estimates, Commuting (Journey to Work), Commuter Adjusted Daytime Population
www.census.gov/hhes/commuting/

Municipalities Within Forsyth County Daytime Commuter Population Change (2010)

Winston-Salem, Forsyth County and Kernersville experience increases in daytime populations while Clemmons and Lewisville experience daytime population losses. *(Note: Daytime population data is not currently available for Walkertown, Rural Hall and Tobaccoville.)*



Source: US Census Bureau, American Community Survey 2006-2010 5-year estimates, Commuting (Journey to Work), Commuter Adjusted Daytime Population
www.census.gov/hhes/commuting/

Forsyth County and Guilford County Population Migration Trends (2005-2010)

Using the number of exemptions listed on annual federal government tax returns as a proxy for individuals, an estimate of how many people move into and out of Forsyth and Guilford counties, the urban center of the Piedmont Triad region, can be determined. Where these migrants come from and leave to can also be identified through the Internal Revenue Service data. Between 2005 and 2010, an average total of 24,200 people either move into or out of Forsyth County each year (equivalent to the population of Kernersville, NC), while an average of 34,600 people (equal to the population of Mooresville, NC) either move into or out of Guilford County each year (see tables below). *(See Maps 2 and 3 on page 15 for a geographic visual of 2009-2010 migration patterns for Forsyth and Guilford Counties).*

The average net population gain per year from migration is 1,910 people for Guilford County and 1,200 for Forsyth County. Almost all of the net population gain is from other states as the average annual in-state population loss is 535 people for Guilford County and 275 people for Forsyth County. The in-state trend seems to slightly go against the perception that more people are moving to the two urban counties in the Piedmont Triad, though most are remaining in the region or are moving to Charlotte or Raleigh.

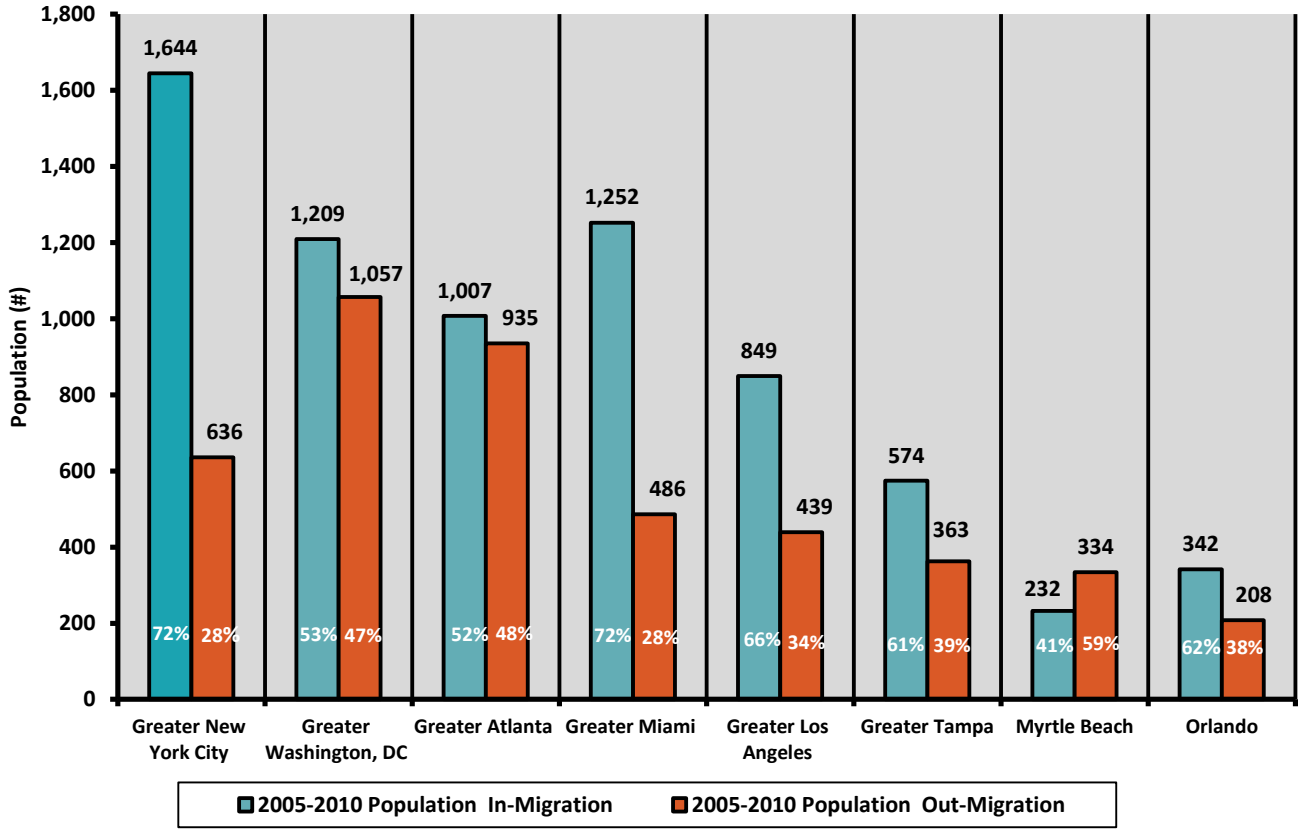
2005-2010 Average Annual Forsyth County Migration *(Rounded Figures)*	Out-of-State	In-State	Totals
In-Bound	5,925	6,775	12,700
Out-Bound	4,450	7,050	11,500
Net Gain	**+1,475**	**-275**	**+1,200**
Total	10,375	13,825	24,200

2005-2010 Average Annual Guilford County Migration *(Rounded Figures)*	Out-of-State	In-State	Totals
In-Bound	8,910	9,350	18,260
Out-Bound	6,465	9,885	16,350
Net Gain	**+2,445**	**-535**	**+1,910**
Total	15,375	19,235	34,610

Source: Internal Revenue Service, Statistics of Income (SOI)
www.irs.gov/uac/SOI-Tax-Stats---Free-Migration-Data-Downloads

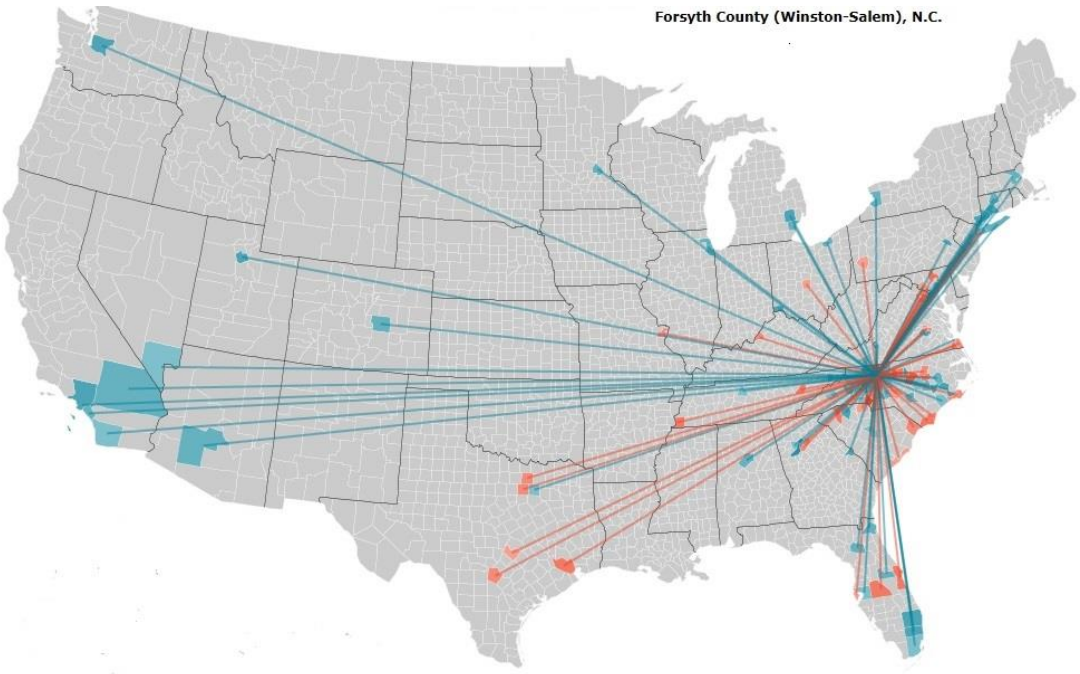
Top Out-of-State Population Migration Origins & Destinations to and from Forsyth County (2005-2010)

The top eight out-of-state migration origins and destinations with Forsyth County account for only nineteen percent of the total out-of-state migration. These locations are Greater New York City, Greater Washington, DC, Greater Atlanta, Greater Miami, Greater Los Angeles, Greater Tampa, Myrtle Beach and Orlando. Of these eight locations, only Myrtle Beach had a net gain of residents from Forsyth County between 2005 and 2010. These results indicated that more citizens move into Forsyth County from out-of-state than move from Forsyth County out-of-state.



	Greater New York City	Greater Washington, DC	Greater Atlanta	Greater Miami	Greater Los Angeles	Greater Tampa	Myrtle Beach	Orlando
Net Population Migration to or from Forsyth Co.	+1,008	+152	+72	+766	+410	+211	-102	+134

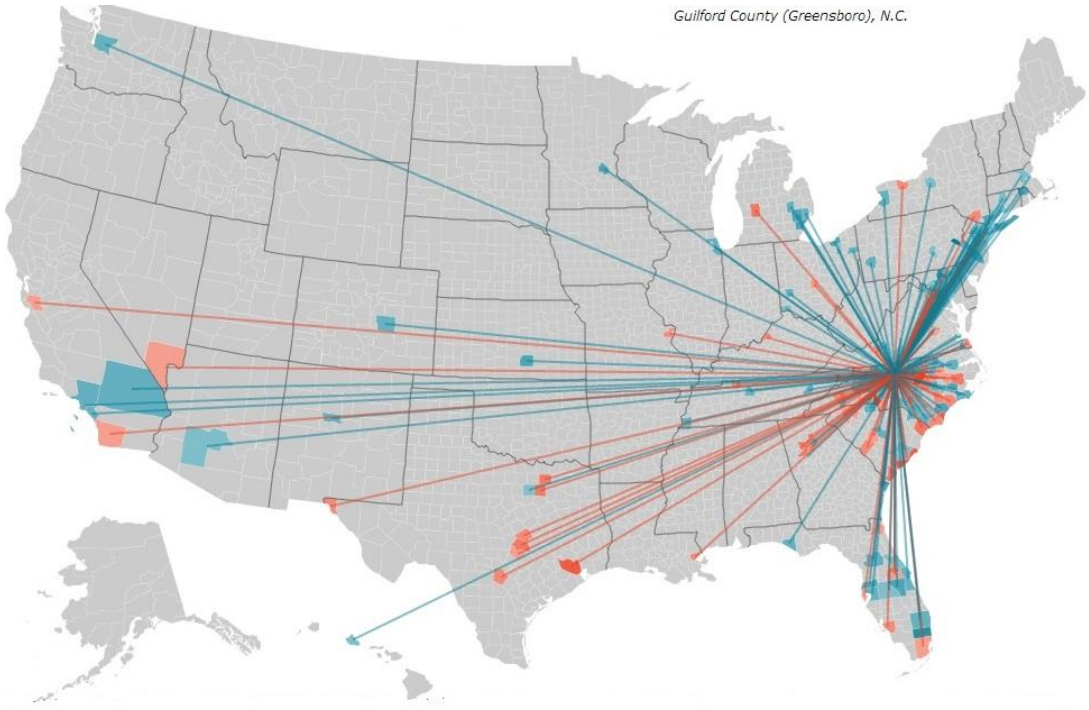
Source: Internal Revenue Service, Statistics of Income (SOI)
www.irs.gov/uac/SOI-Tax-Stats---Free-Migration-Data-Downloads



Map 2: 2009-2010 Forsyth County Migrations Patterns

Out-Bound Migration **In-Bound Migration**

Source: www.forbes.com/special-report/2011/migration.html



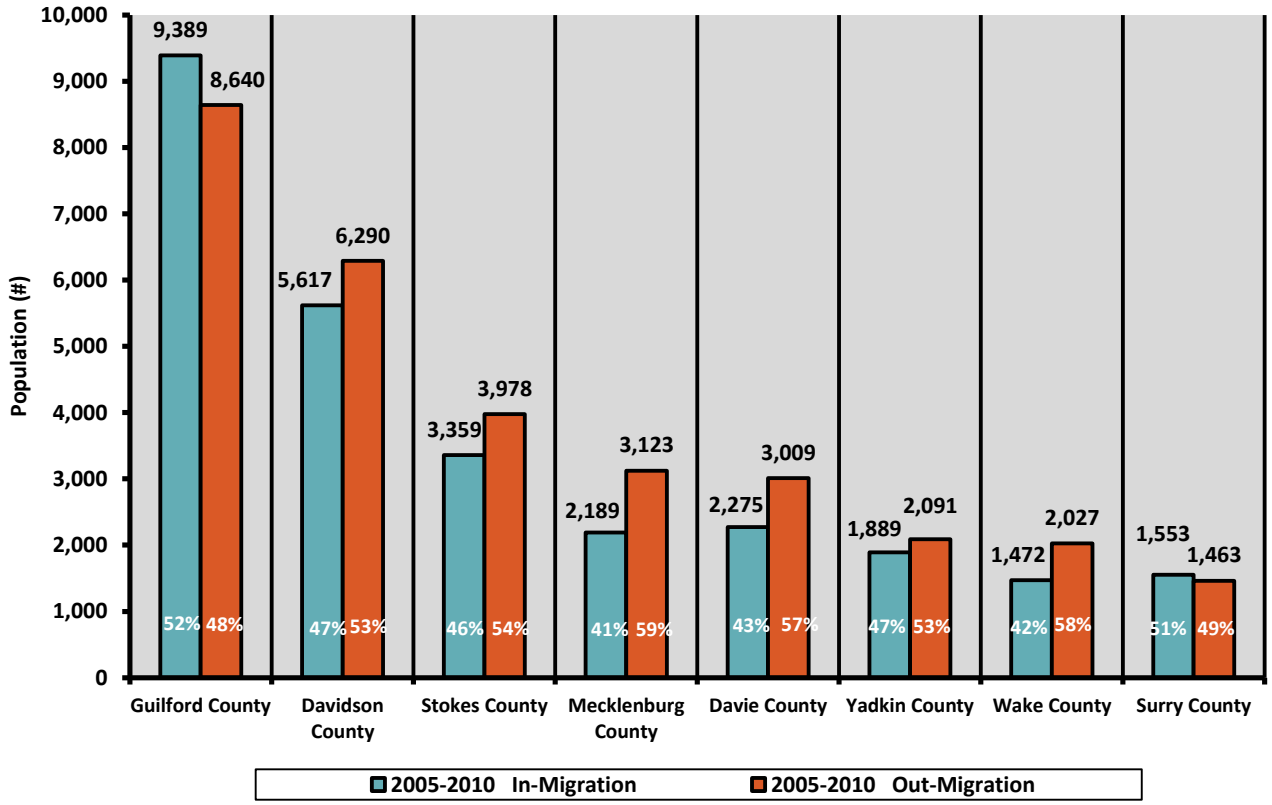
Map 3: 2009-2010 Guilford County Migrations Patterns

Out-Bound Migration **In-Bound Migration**

Source: www.forbes.com/special-report/2011/migration.html

Top In-State Population Migration Origins & Destinations to and from Forsyth County (2005-2010)

Seventy percent of the in-state migration to and from Forsyth County involves only eight counties: Guilford, Davidson, Stokes, Mecklenburg, Davie, Yadkin, Wake and Surry. Only with Guilford and Surry counties is there a net gain of people from 2005 to 2010. These numbers indicate more existing residents move outside of Forsyth County than move into it. It is unclear if residents want to live in a less urban environment since there are net losses to both Mecklenburg and Wake counties.



	Guilford County	Davidson County	Stokes County	Mecklenburg County	Davie County	Yadkin County	Wake County	Surry County
Net Population Migration to or from Forsyth Co.	+749	-673	-619	-934	-734	-202	-555	+90

Source: Internal Revenue Service, Statistics of Income (SOI)
www.irs.gov/uac/SOI-Tax-Stats---Free-Migration-Data-Downloads

Transportation Modes and Affordability Trends

Legacy 2030 calls for increased use of public transportation and increased carpooling to reduce traffic congestion through fewer single-occupant vehicle commuters. Transportation statistics compiled between 2000 and 2010 indicate that Forsyth County drivers are not necessarily moving toward those ends.

Trends:

- The average number of vehicles per household and the percentage of single-occupant vehicles have increased between 2000 and 2010 while the percentage of workers carpooling has decreased and the percentage of people using transit has remained the same (p. 19).
- Despite higher numbers of vehicles and less carpooling, average commuting times have remained the same or decreased between 2000 and 2010 (p. 20). Explanations may be that commuting distances may be less, more people working at home or better transportation networks.
- For the five most populated metropolitan areas in North Carolina, average monthly transportation costs are higher than average housing costs. Transportation costs range between 26% and 31% of household income while housing costs range between 23% and 25% of household income (pp.21-22).
- All of the five North Carolina metropolitan areas exceed the Center for Neighborhood Technology's suggested affordability threshold of 45% for Housing and Transportation costs, ranging from 49% to 58% (p. 22).

Transportation Mode Trends

Forsyth County Workers, Average Number of Vehicles and Percent Transportation Mode (2000-2010)

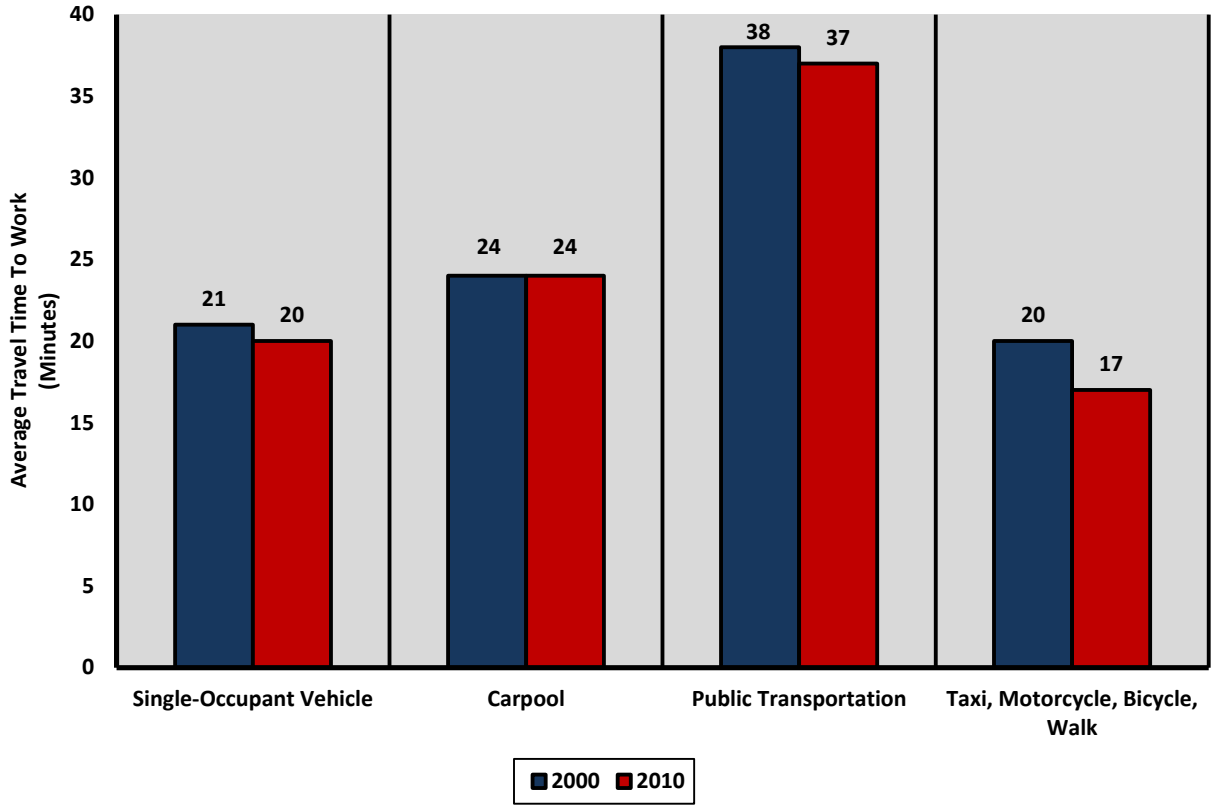
A transportation profile based on census data from 2000 and 2010 shows that the number of workers in Forsyth County increased by 7%, the percentage of single-occupant vehicles increased from 81% to 85%, the number of workers carpooling decreased from 13% to 9%, and the number of workers residents using public transportation remained the same at 1%.

Forsyth County	2000	2010
Total Workers	170,200	181,500
Average Number of Vehicles Per Household	1.74	1.78
Single-occupant vehicles	81%	85%
Carpool	13%	9%
Public Transportation	1%	1%
Other Means	3%	2%
Worked at Home	2%	3%

Source: US Census Bureau, American Community Survey 2006-2008 3-year estimates, Special Tabs for Census Transportation Planning Products
ctpp.transportation.org/Pages/3yrdas.aspx

Forsyth County Average Travel Time to Work by Transportation Mode (2000-2010)

While the number of single-occupant vehicles on Forsyth County roads have likely increased and carpooling has decreased between 2000 and 2010, average travel times to work have either remained the same or have decreased somewhat for all modes of transportation. Possible explanations include better road networks, higher speed limits, and more efficient public transportation routes.

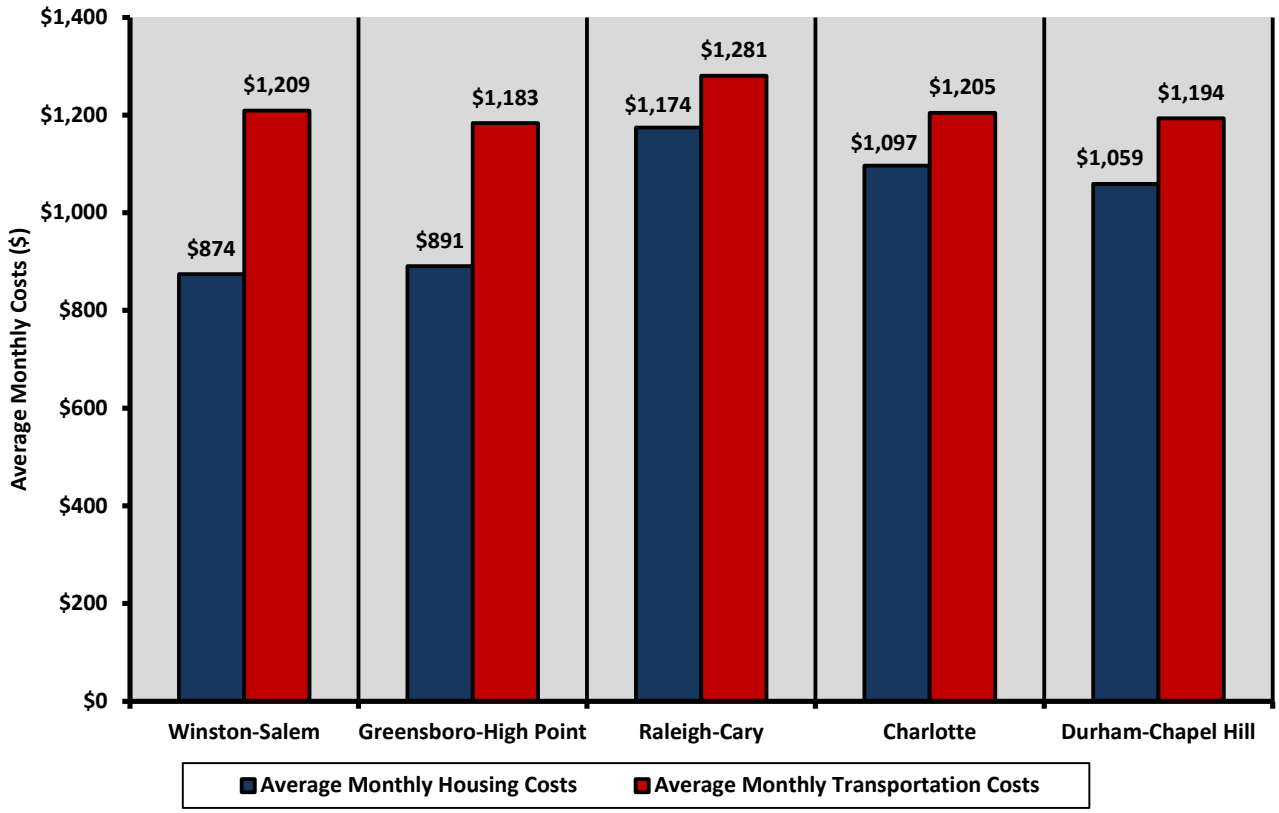


Source: US Census Bureau, American Community Survey 2006-2008 3-year estimates, Special Tabs for Census Transportation Planning Products
ctpp.transportation.org/Pages/3yrdas.aspx

Monthly Housing and Transportation Costs Comparison for North Carolina Metropolitan Statistical Areas (MSAs) (2012)

Because of expenses involved in traveling to and from work, transportation costs are now being combined with housing costs as a measure of affordability for working families. In all five of the most populated North Carolina metropolitan areas, average monthly transportation costs exceed average monthly housing costs.

A comparison of the five metropolitan areas shows that the average monthly costs for housing and transportation exceed $2,000 in all areas. The Greensboro and Winston-Salem MSAs are the least expensive with a combined average expense of $2,074 and $2,083, respectively. The Raleigh-Cary MSA has the most expensive housing and transportation costs with an average of $2,455 per month.

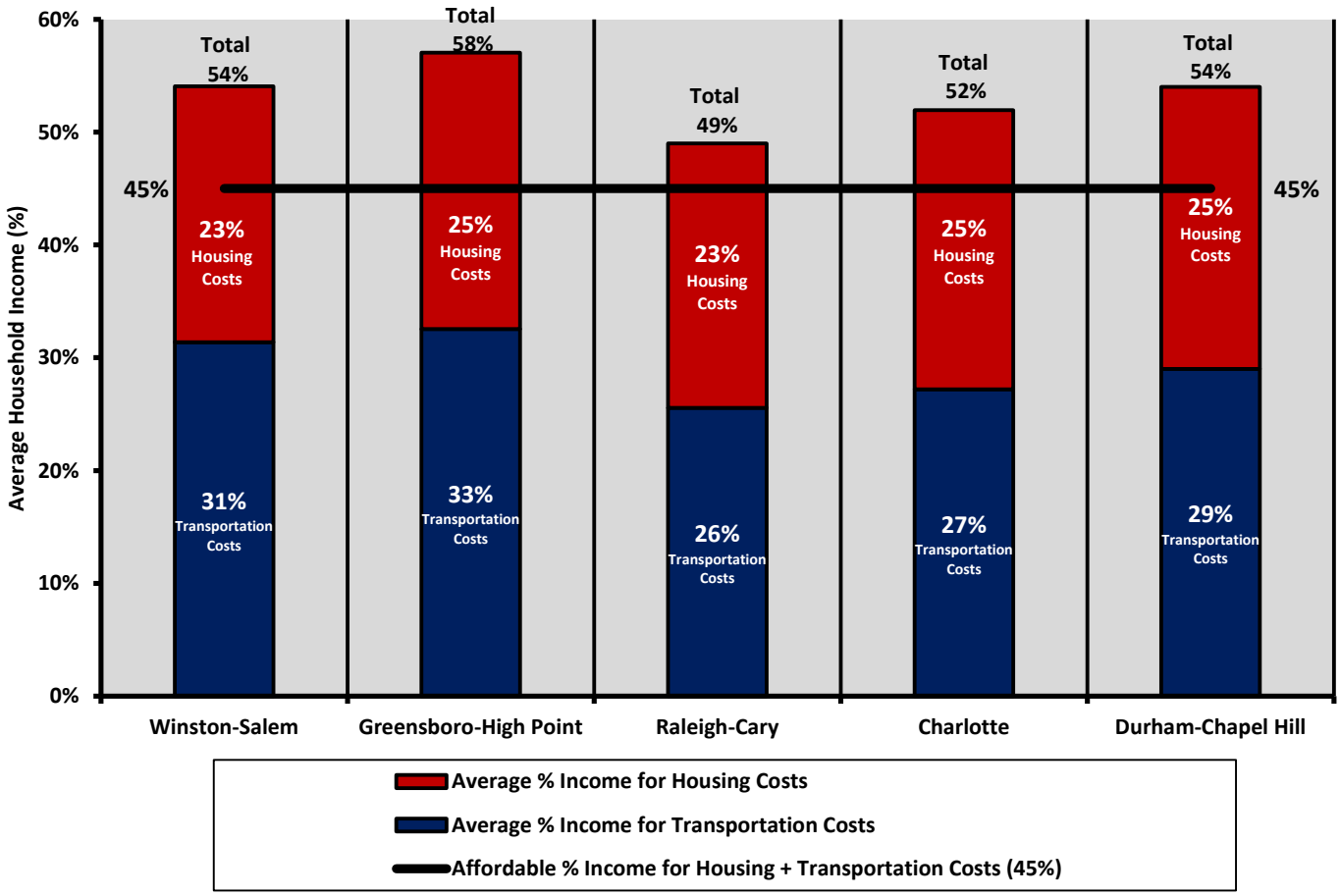


Source: The Center for Neighborhood Technology Housing + Transportation (H+T®) Affordability Index
www.htaindex.org/

(Sources Used for Determining the Housing and Transportation Costs for the H + T Affordability Index can be found on page 4 after the Table of Contents.)

Monthly Percentage of Housing and Transportation Costs Comparison for North Carolina Metropolitan Statistical Areas (MSAs) (2012)

The Center for Neighborhood Technology has established a national standard that combined housing and transportation costs should not consume more than 45% of a household's income (up to 30% for housing costs and up to 15% for transportation costs). The housing costs for all five NC metro areas do not exceed 25% of income, but all metro areas exceed the 15% standard for transportation costs by at least 10%. The combined housing and transportation affordability index for the metro area ranges from a low of 49% for Wake County to a high of 58% for Guilford County.



Source: The Center for Neighborhood Technology Housing + Transportation (H+T®) Affordability Index
www.htaindex.org/

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Economic Trends

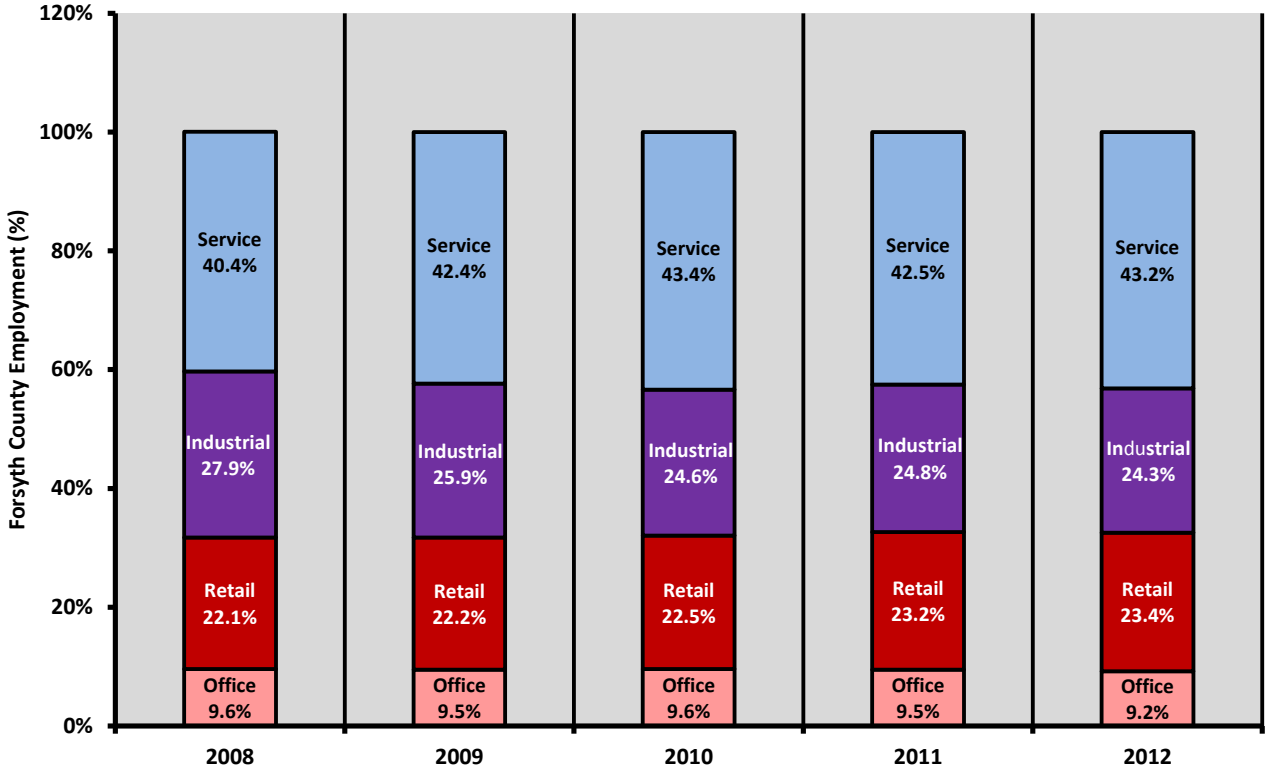
The Legacy 2030 Update indicates that future employment growth will most likely occur in the service and knowledge-based sectors with higher-paying jobs requiring higher levels of education. Over the past 20 years, Forsyth County's share of service sector jobs has increased by 12 percent, replacing industrial and retail jobs. Our county will need to embrace the growth of knowledge-based jobs in advanced manufacturing, biomedical/biotechnical, financial services and other fields. It suggests that government, the business community and all learning institutions work together to assure that students are receiving training for jobs in emerging sectors, particularly in science, technology, engineering and math (STEM).

Trends:

- Industrial employment continues its two decade trend of decline, being replaced primarily with service jobs (p. 24).
- In knowledge-based occupational clusters, employment increases are occurring in personal services, healthcare/ medical science, primary/ secondary/ vocational education and social services, personal services and art, entertainment, publishing and broadcasting. Employments reductions are occurring in skilled production workers and in managerial, sales, marketing and human resources occupational clusters (p.25).
- Based on location quotients, the two strongest knowledge-based occupational clusters are healthcare/ medical science and postsecondary education/ knowledge creation. The robustness of their location quotients at 1.5 and 1.4, respectively, means that these clusters are employing more people than demanded by Forsyth County alone and are exporting goods and services beyond Forsyth County (p. 26).
- STEM jobs have a 20% share of the job market in the Winston-Salem Metropolitan Statistical Area (MSA), which is comparable to other metropolitan areas in North Carolina (p. 28).
- A majority of STEM jobs in the Winston-Salem MSA do not require bachelor degrees. Of the 35,000 STEM jobs, greater than 60% require an associate's degree or less while paying on average nearly $50,000 per year. This salary is 66% greater than non-STEM jobs with similar educational requirements (pp. 29-30).
- STEM jobs requiring bachelor degrees or higher pay on average nearly 50% more than non-STEM jobs with similar education requirements: $83,500 to $56,500 per year (p. 31).
- Forsyth County ranks sixth in North Carolina in the number of inventive patents issued since 2000 (p.32).

Forsyth County Employment by Sector (2008-2012)

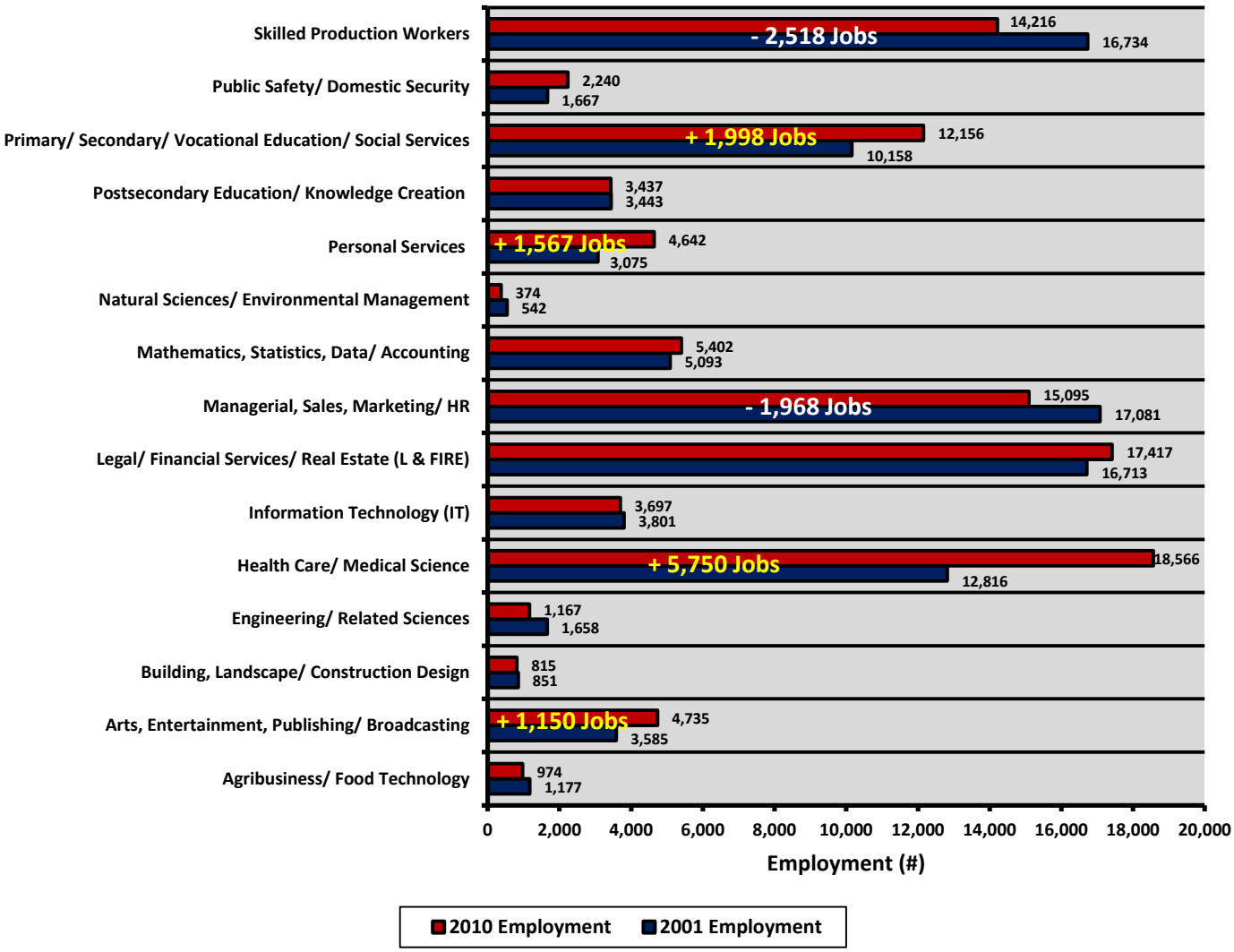
The increase in service sector jobs continues to expand its share of the job market increasing from 40% to 43% between 2008 and 2012. The industrial sector continues its decline dropping from 28% of the job market to 24%. Meanwhile, the retail and office sectors have remained fairly steady with their shares of the employment market hovering at 22% to 23% and 9% to 10%, respectively.



Source: U.S. Department of Commerce, Bureau of Economic Analysis (BEA)
www.bea.gov/itable/

Forsyth County Knowledge-Based Occupational Clusters (2001 & 2010)

The Economic Development Administration through the Purdue Center for Regional Economic Development and other collaborators categorized greater than 400 occupations in the Standard Occupational Code (SOC) into 15 knowledge-based occupational clusters for Forsyth County, shown in the chart below. The chart shows changes in the number employed in these 15 clusters in 2001 and 2010. The greatest job growth since 2001 were in the following occupational clusters: Health Care/ Medical Science (+5,750 jobs), Primary/ Secondary/ Vocational Education and Social Services (+1,998 jobs), Personal Services (+1,567 jobs) and Art, Entertainment, Publishing and Broadcasting (+1,150 jobs). The occupational clusters with the largest decrease since 2001 were in Skilled Production Workers (- 2,518 jobs) and in Managerial, Sales, Marketing and Human Resources (-1,968 jobs).



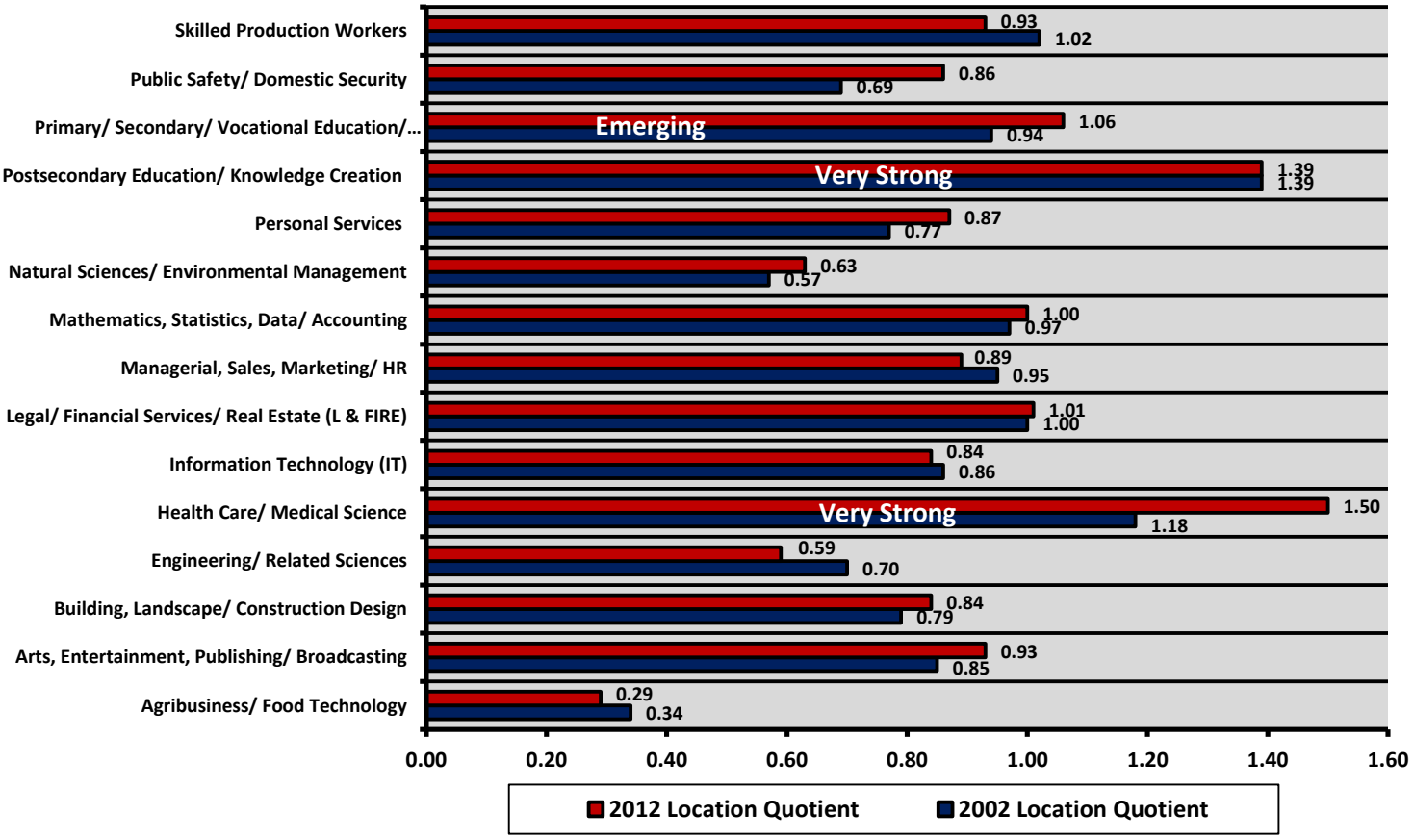
Source: US Department of Commerce, Economic Development Administration: Work conducted by the Purdue Center for Regional Development and Indiana Business Research Center at Indiana University
www.statsamerica.org/innovation/data.html

Location Quotients (LQs) for Forsyth County Knowledge-Based Occupational Clusters (2002 & 2012)

Location quotients (LQs) are an analysis tool for determining which occupational clusters make Forsyth County's economy unique, for identifying occupational clusters that bring money into the county, and for identifying endangered occupations that could erode the county's economic base. LQs compare the concentration of the knowledge-based occupational cluster in Forsyth County to the typical cluster concentration in the nation.

A location quotient greater than 1.0 indicates that the occupational cluster may be providing employment for a good or service that serves an area greater than Forsyth County. A location quotient less than 1.0 suggests an occupational cluster whose employment may not be providing a good or service that meets all of Forsyth County demand and that part of the employment to meet the demand for the good or service is coming from outside of the county. An LQ greater than 1.25 strongly suggests employment for a cluster that exports good or service, while an LQ less than 0.75 strongly suggests a cluster where employment to provide those goods or services is partially coming from outside Forsyth County.

The chart shows the location quotients for knowledge-based occupational clusters for Forsyth County in 2002 and 2012.



Source: US Department of Commerce, Economic Development Administration: Work conducted by the Purdue Center for Regional Development and Indiana Business Research Center at Indiana University
www.statsamerica.org/innovation/data.html

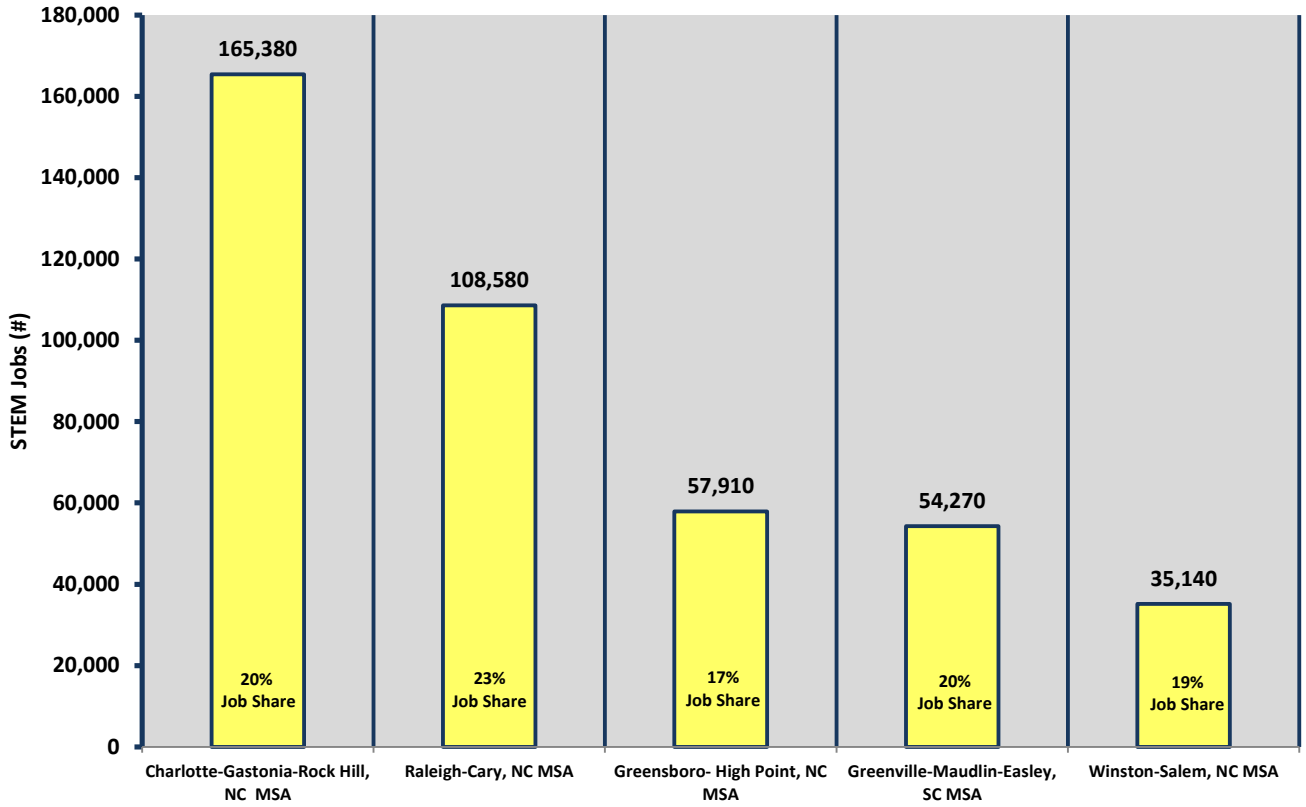
The two strongest occupational clusters are Healthcare/ Medical Science with an LQ that increased from 1.18 in 2002 to 1.50 in 2012 and Postsecondary Education/ Knowledge Creation, which has remained steady between 2002 and 2012 with an LQ of 1.39. It seems surprising that the Legal/ Financial Services/ Insurance/ Real Estate occupational cluster is only 1.01 given the headquarters of BB&T and the regional center of Wells Fargo located in Winston-Salem. The Primary/ Secondary/ Vocational Education and Social Services cluster could be an emerging employment and economic base with its LQ increasing from 0.94 in 2002 to 1.06 in 2012.

Photograph: Wake Forest Health

STEM Jobs by Selected Metropolitan Statistical Areas (MSAs) (2011)

A 2013 report entitled *The Hidden STEM Economy*, prepared by the Metropolitan Policy Program at the Brookings Institute, stated that policymakers have mainly focused on supporting workers with at least a bachelor's (BA) degree, overlooking a strong potential workforce of those with less than a BA. Nationwide, half of all STEM jobs are manufacturing, health care, or construction and are available to workers without a four-year college degree.

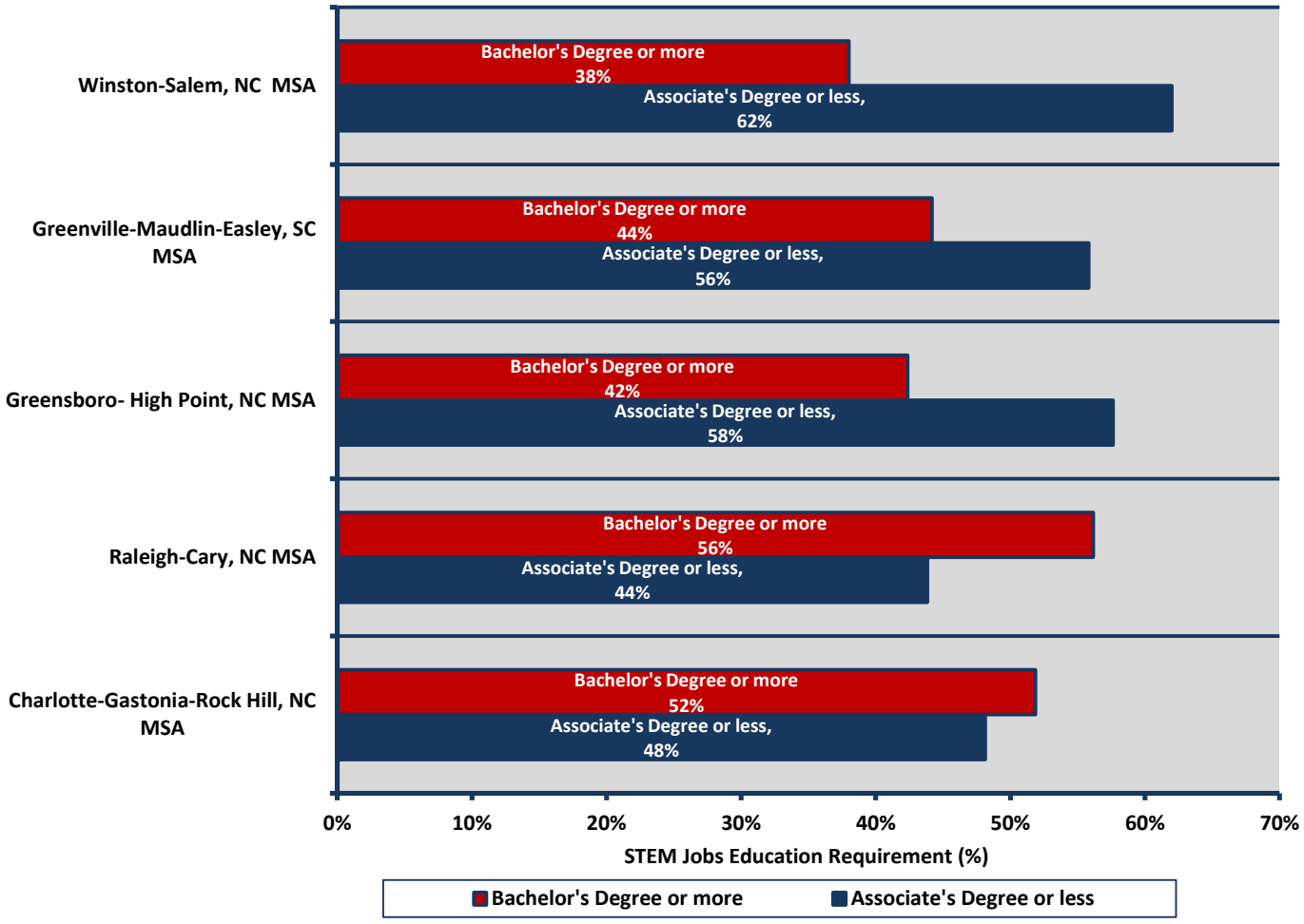
A comparison of five mostly North Carolina MSAs shows that the highest number of STEM jobs are located in the Charlotte MSA at 165,380 jobs followed by the Raleigh MSA (108,580 jobs) followed by the Greensboro MSA (57,910 jobs), Greenville, SC MSA (54, 270 jobs) and the Winston-Salem MSA at 35,140 jobs. STEM jobs generally accounted for about 20% of all jobs, specifically ranging from a low of 17% in the Greensboro MSA to a high of 23% in the Raleigh MSA.



Source: The Hidden STEM Economy, the Metropolitan Policy Program at Brookings, June 2013
www.brookings.edu/research/reports/2013/06/10-stem-economy-rothwell

STEM Job Education Requirements by Selected Metropolitan Statistical Areas (MSAs) (2011)

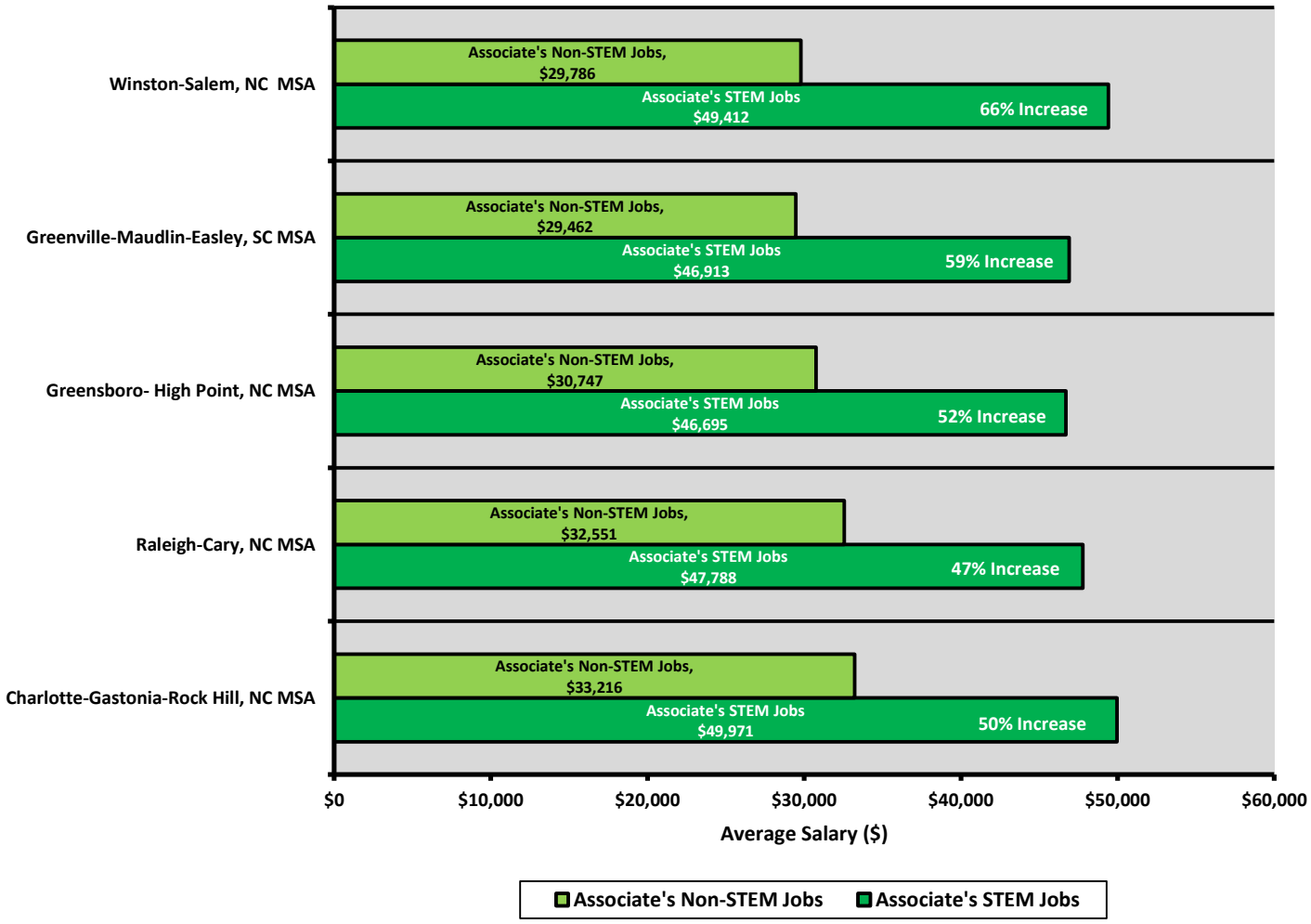
Of the five MSAs compared, three (Greensboro, Greenville and Winston-Salem) follow the nationwide trend of having more than half of all STEM jobs requiring only an associate's degree or less at 58%, 56% and 62%, respectively . The Charlotte and Raleigh MSAs have more STEM jobs requiring a bachelor's degree than an associate's degree or less at 52% and 56%, respectively.



Source: The Hidden STEM Economy, the Metropolitan Policy Program at Brookings, June 2013
www.brookings.edu/research/reports/2013/06/10-stem-economy-rothwell

Comparison of Average Salaries for STEM Jobs Requiring an Associate's Degree and non-STEM Jobs by Selected MSAs (2011)

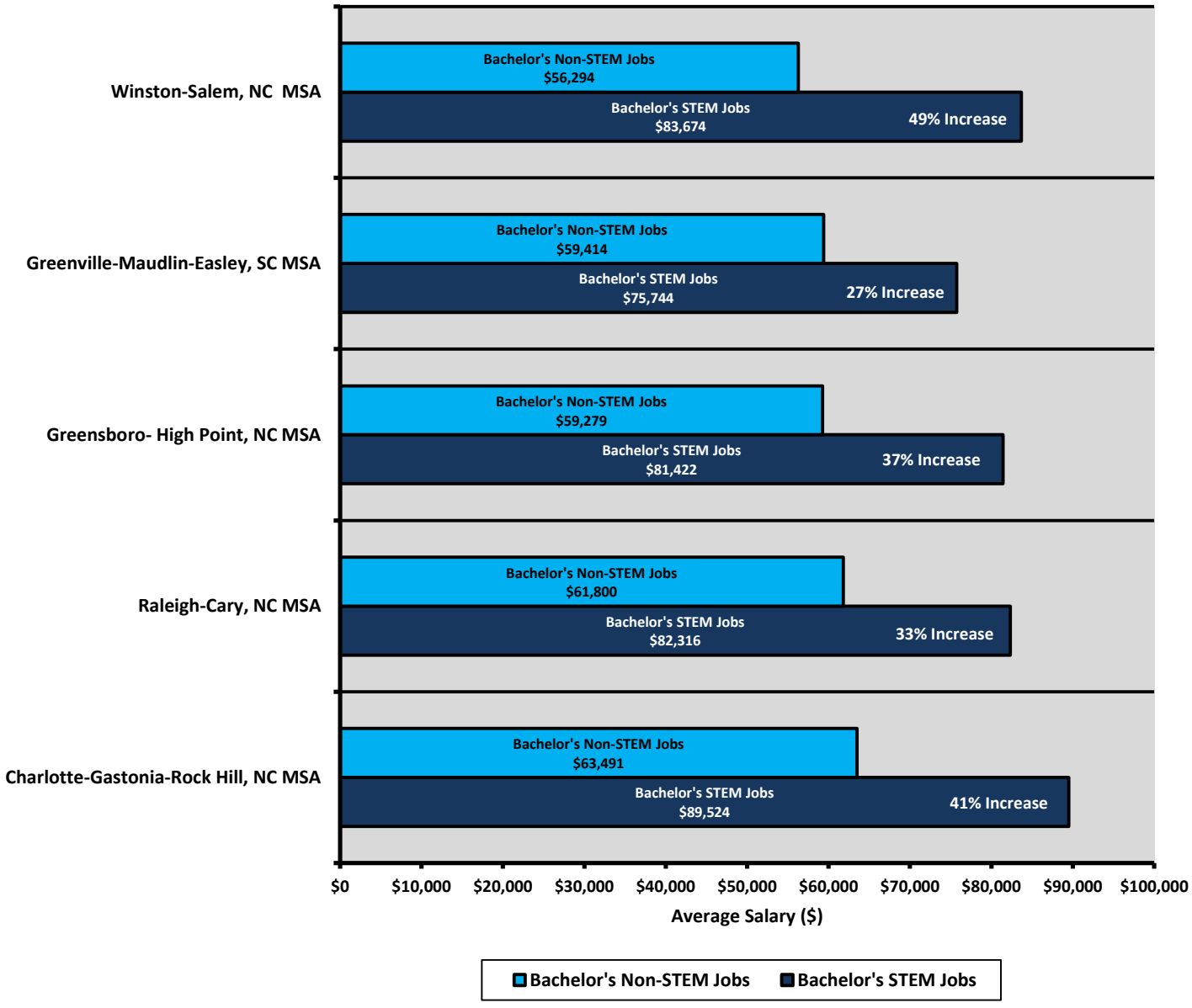
Nationwide, STEM jobs requiring an associate's degree pay a wage 10 percent higher than non-STEM jobs requiring an associate's degree. However, for the five MSAs examined, associate's degree STEM jobs paid approximately 50% more or greater than non-STEM jobs with similar educational requirements. Forsyth County had the greatest salary disparity between STEM and non-STEM jobs at 65%.



Source: The Hidden STEM Economy, the Metropolitan Policy Program at Brookings, June 2013
www.brookings.edu/research/reports/2013/06/10-stem-economy-rothwell

Comparison of Average Salaries for STEM Jobs Requiring a Bachelor's Degree and non-STEM Jobs by Selected MSAs (2011)

The wage trends between STEM jobs and non-STEM jobs requiring bachelor's degrees are similar but not quite as dramatic when compared to similar jobs requiring only an associate's degree or less. For the five MSAs being compared, the increase in salary for STEM jobs ranges from a low of 27% for the Greensboro MSA to a high of 49% for the Winston-Salem MSA.



Source: The Hidden STEM Economy, the Metropolitan Policy Program at Brookings, June 2013
www.brookings.edu/research/reports/2013/06/10-stem-economy-rothwell

Technological Innovation Trends

One indirect and limited measure that may reflect technological innovation in an area is the number of utility or "inventive" patents issued, though there is a very limited connection between inventive patents and actual technological change.

Top 7 North Carolina Counties for Utility "Inventive" Patents (2000-2011)

Forsyth County ranks sixth in North Carolina in the number of utility patents issues from the years 2000 to 2011 with a total of 824 patents. The highest number of utility patents have been issued in Wake County (9,912) Durham County (2,213) and Orange County which includes the University of North Carolina, Duke University and N.C. State University in addition to Research Triangle Park.

County	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	Total
Wake County	664	672	665	698	685	643	845	762	884	963	1,246	1,185	9,912
Durham County	156	159	171	167	143	125	214	161	181	220	263	253	2,213
Orange County	149	169	137	175	144	149	172	146	150	162	211	236	2,000
Mecklenburg County	171	163	149	137	106	112	134	118	113	131	200	181	1,712
Guilford County	107	103	103	126	131	94	119	86	61	64	112	135	1,241
Forsyth County	72	79	77	66	73	49	61	65	52	57	84	89	824
Catawba County	60	63	59	67	52	55	63	61	52	35	55	33	655

Source: U.S. Patent and Trademark Office
www.uspto.gov/web/offices/ac/ido/oeip/taf/reports.htm

Construction Trends

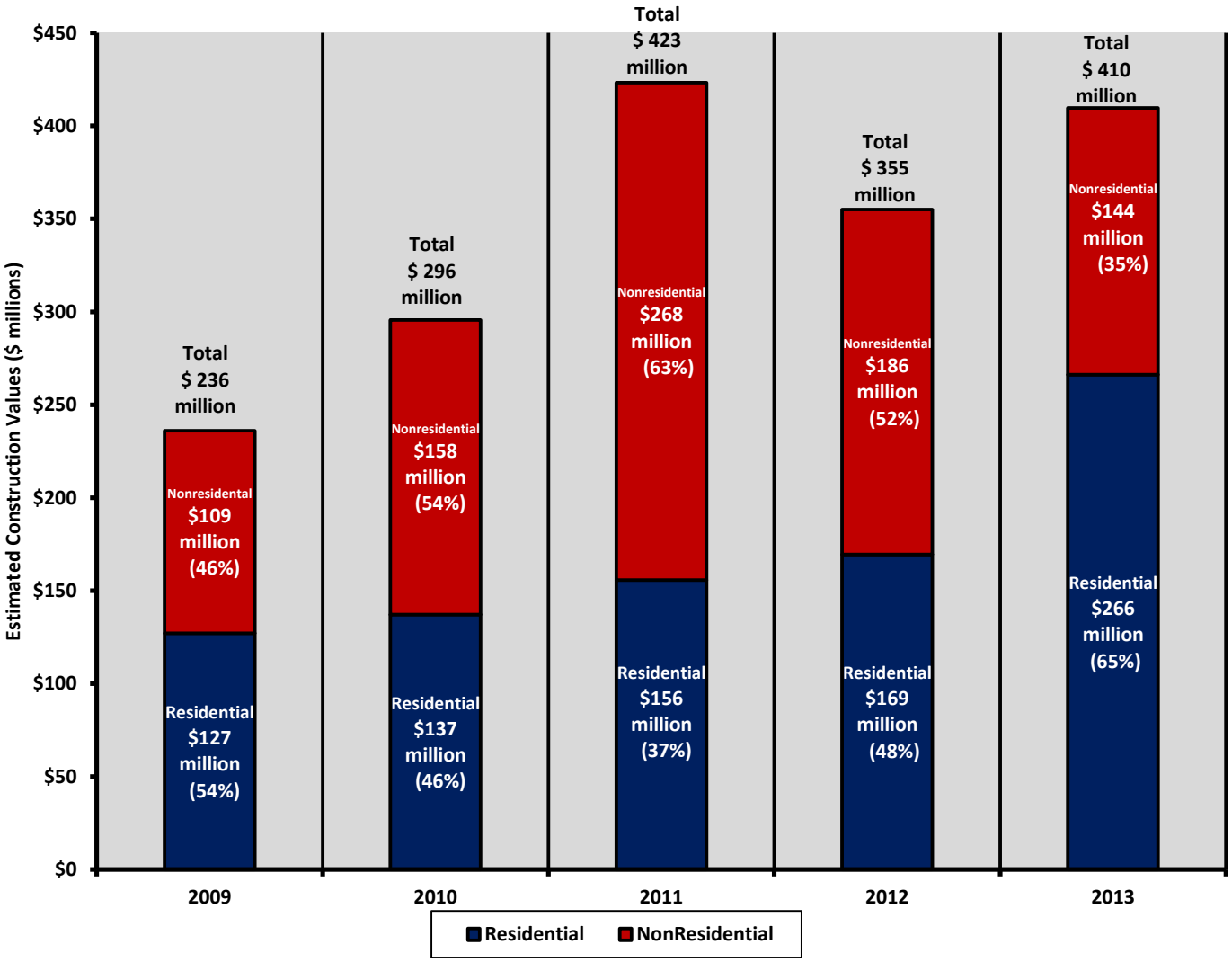
The Legacy 2030 Update does not directly discuss construction trends; however, building permit activity is an important economic indicator. The Inspections Division of the Planning and Development Services Department maintains the most thorough construction data with regard to overall nonresidential and residential development trends in Forsyth County.

Trends:

- Estimated residential construction values exceeded nonresidential construction for in 2013 for the first time since the Great Recession in 2008 (p. 34).
- Estimated new nonresidential construction values continue to fluctuate ranging from a low of $30 million in 2013 to a high of $110 million in 2012. However, nonresidential renovation and redevelopment values exceeded new construction values in 2010, 2011 and 2013 lifting overall nonresidential construction values to an average of $185 million over the last five years (pp. 35-36).
- Institutional uses, which do not pay local government property taxes, may no longer be the primary nonresidential new construction value sector as industrial or office uses have been the highest nonresidential construction value sector in 2010, 2011 and 2013. Institutional uses had been the highest new construction value sector in four of the previous five years between 2005 and 2009 (p. 37).
- Single-family dwellings, 2-4 dwelling unit structures and condominium/apartment developments have all rebounded somewhat from their combined lows in 2009, though recent total residential construction values in all three sectors remain at one-third to one-half the construction value levels that existed from 2001 to 2006 (p. 38).
- Likewise, the number of dwelling units constructed since 2009 are at levels one-third to one-half of pre-2008 levels (p. 39).
- Though the average dwelling size and average new construction housing values for single-family dwellings, 2-4 dwelling unit structures and condominiums/ apartments have generally increased between 2009 and 2013, the ranges of their size and value remain similar to 2005-2009 ranges (pp. 40-41).

Estimated Forsyth County Residential and Nonresidential Construction Values (2009-2013)

Comparing residential and nonresidential construction values give an indication of the strength of each development sector. Residential construction in Forsyth County accounted for 50% to 60% of overall construction values between 2003 and 2008, before the Great Recession greatly reduced demand for new single-family housing. Nonresidential construction accounted for a majority of overall construction values from 2009 until 2013 when residential construction accounted for 65% of overall construction values. Estimated overall construction values have ranged between $236 million and $423 million in the last five years.



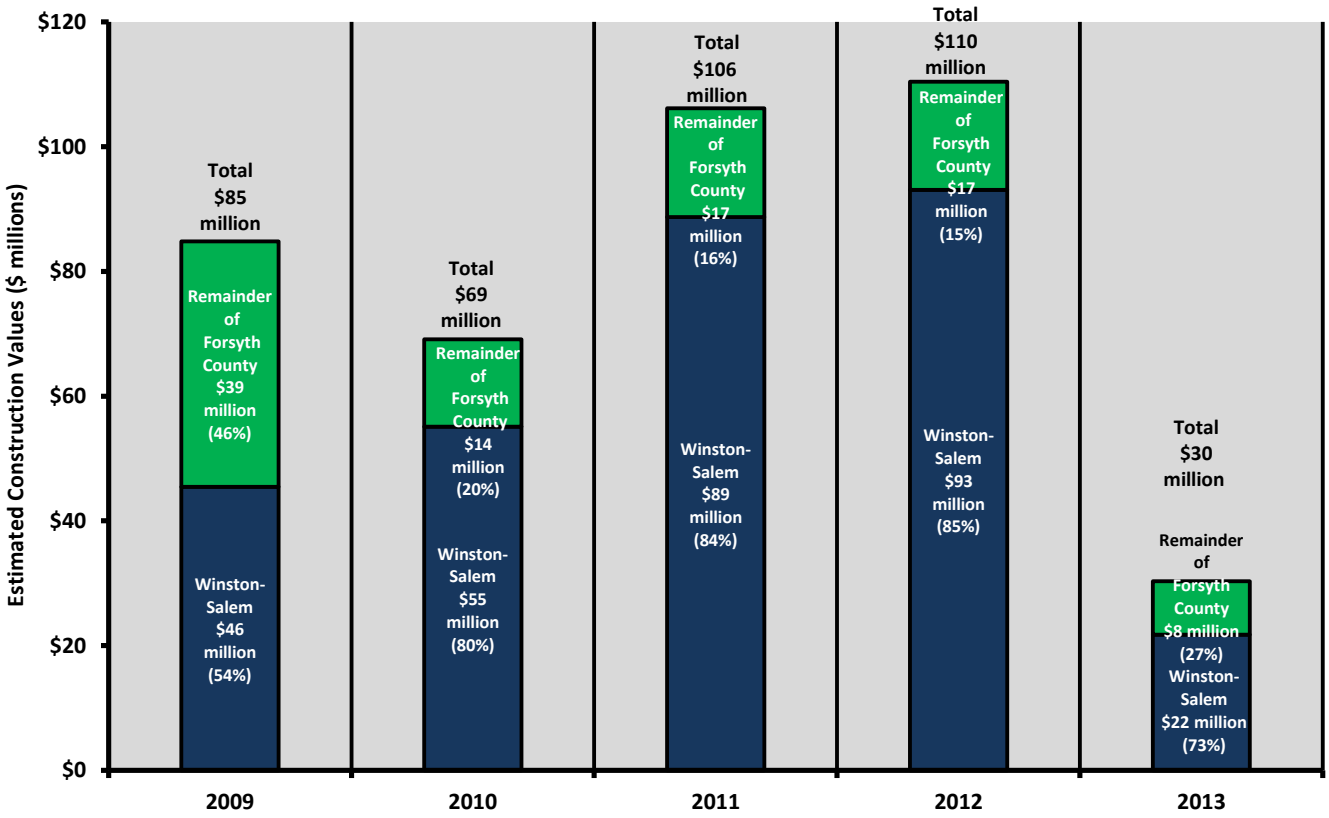
Sources: Winston-Salem-Forsyth County Planning and Development Services Department; McGraw Hill Construction Dodge Reports
www.cityofws.org/departments/inspections
www.construction.com/dodge/
(Note: The estimated nonresidential construction value totals above do not include the value of demolitions.)

Nonresidential Construction Trends

This section includes an analysis of nonresidential construction (i.e. office, retail, institutional and industrial developments) based on issued building permits from the Department of Planning and Development Services between 2009 and 2013.

Estimated Nonresidential New Construction Values: Winston-Salem and the Remainder of Forsyth County (2009–2013)

Estimated new nonresidential construction values continued to rise and fall between 2009 and 2013. New construction values for all of Forsyth County exceeded $100 million for the first time since 2007 in 2011 ($106 million) and in 2012 ($110 million) but dropped precipitously to $31 million in 2013, the lowest value thus far in the 21st century. Winston-Salem (shown in blue below) continues to be where the bulk of new nonresidential construction takes place, accounting for 70% or more of the estimated construction value each year. The exception was in 2008 when Winston-Salem provided only 54% of the overall county's estimated new nonresidential construction value.

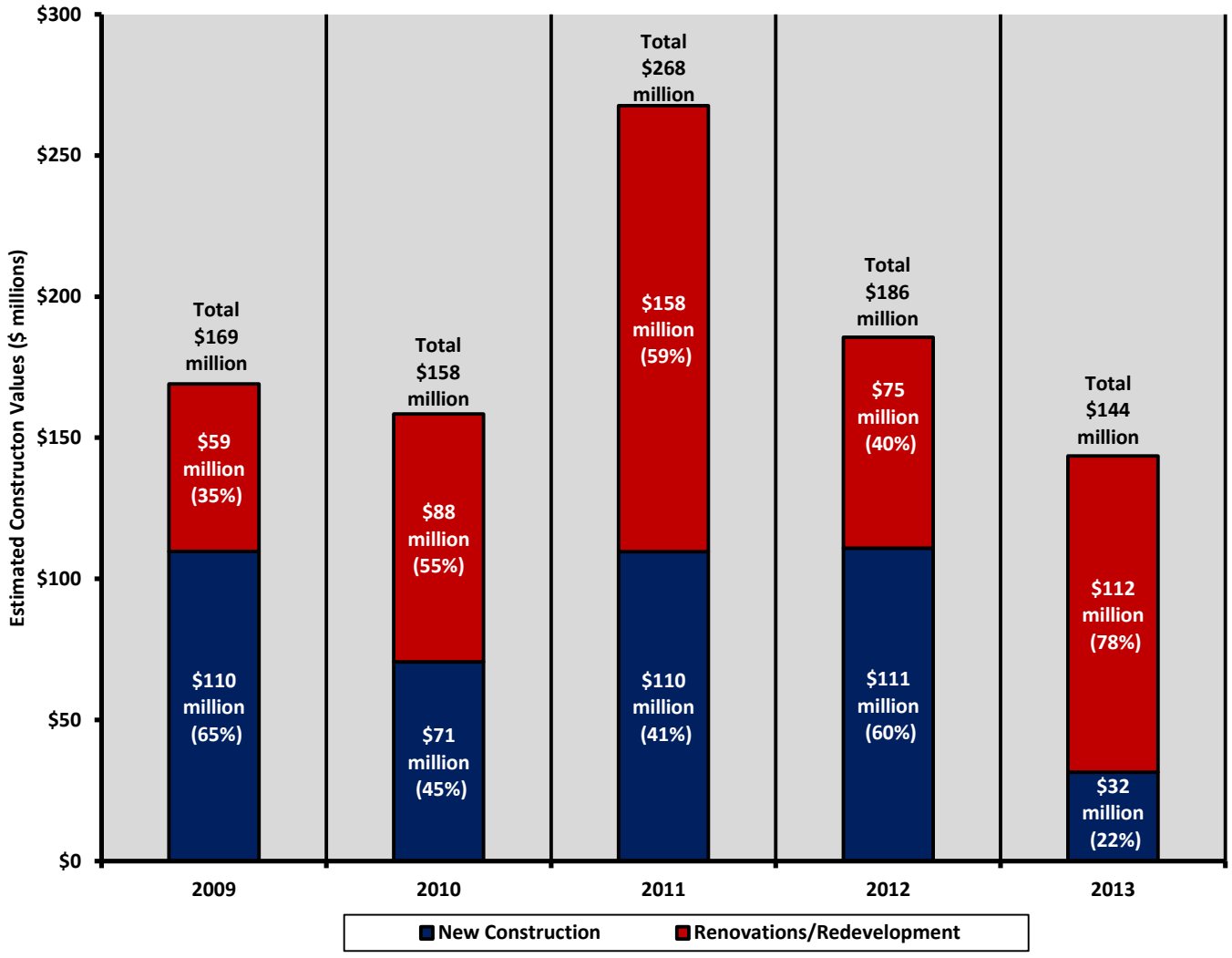


Source: Winston-Salem/Forsyth County Planning and Development Services Department
www.cityofws.org/departments/inspections

(Note: The estimated new nonresidential construction value totals above do not include the value of signs, transmission towers, accessory structures and other uses that are reported as a whole and are unable to be allocated to office, retail, institutional or industrial uses.)

Estimated Forsyth County Nonresidential Construction Values: New Construction versus Renovations and Redevelopment (2009–2013)

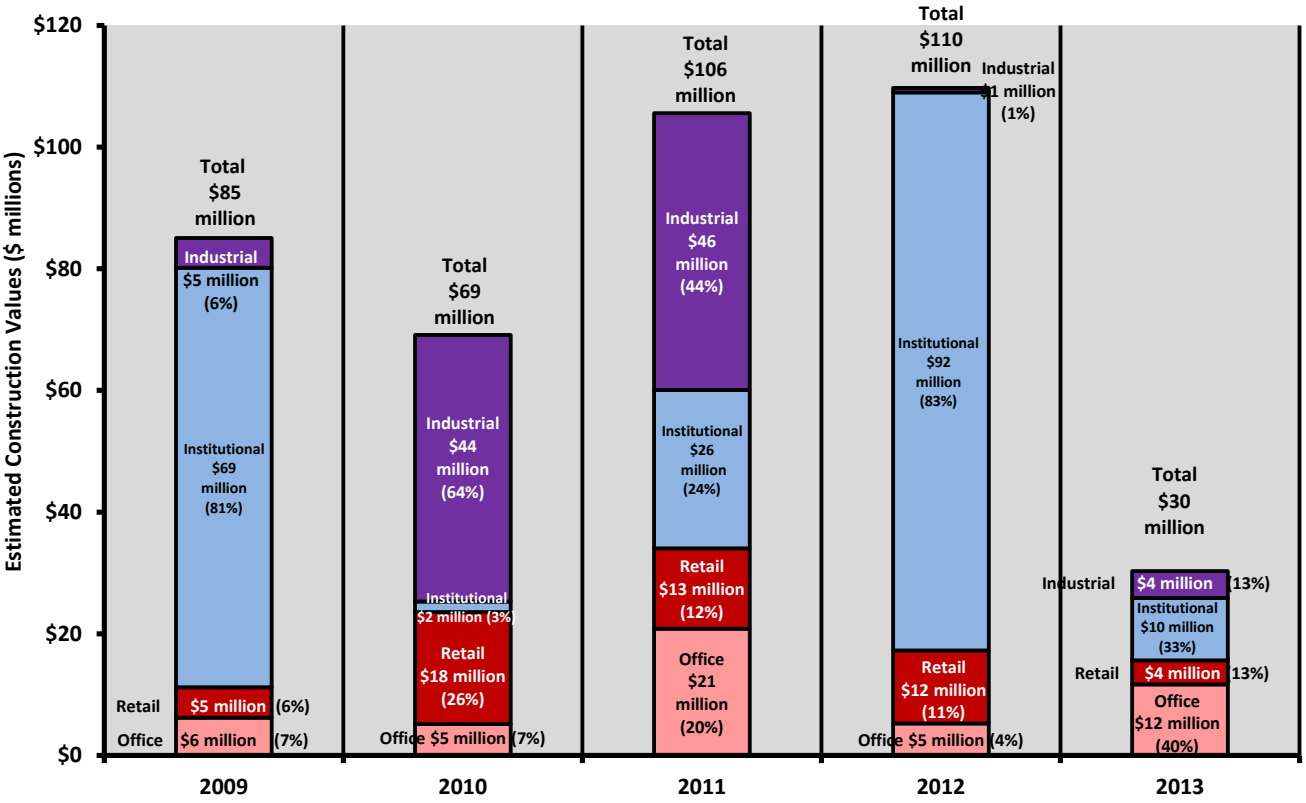
Since 2001, renovation and redevelopment nonresidential construction values have generally been 30% to 40% of new nonresidential construction values. However, this trend has been reversed in three of the last four years when renovations and redevelopments of existing buildings exceeded new nonresidential construction values. Possible explanations include the recent renovation of former RJ Reynolds manufacturing buildings to offices and research and development facilities in the Innovation Quarter downtown and the impact of tax credit benefits when renovating qualifying historic buildings.



Source: Winston-Salem/Forsyth County Planning and Development Services Department
www.cityofws.org/departments/inspections
(Note: These figures do not include factories and other nonresidential uses being redeveloped solely for residential purposes.)

Estimated Forsyth County New Nonresidential Construction Values by Land Use Sector (2009–2013)

Highest construction values have alternated between industrial, institutional and office sectors between 2009 and 2013. Industrial construction led in 2010 ($44 million) and 2011 ($46 million) with institutional construction leading in 2009 ($69 million) and 2012 ($92 million). Office construction led in 2013 with $12 million. This variation is an encouraging trend that hopefully departs from institutional construction (e.g. for church, schools, hospitals, etc.) typically being the highest value sector (2005, 2007, 2008, 2009, and 2012). Institutional uses are generally nonprofit entities which are exempt from paying local property taxes. Retail construction continues to be weak, not exceeding $20 million in value in any of the last five years, when it typically ranged from $45 million to $50 million per year prior to the Great Recession.

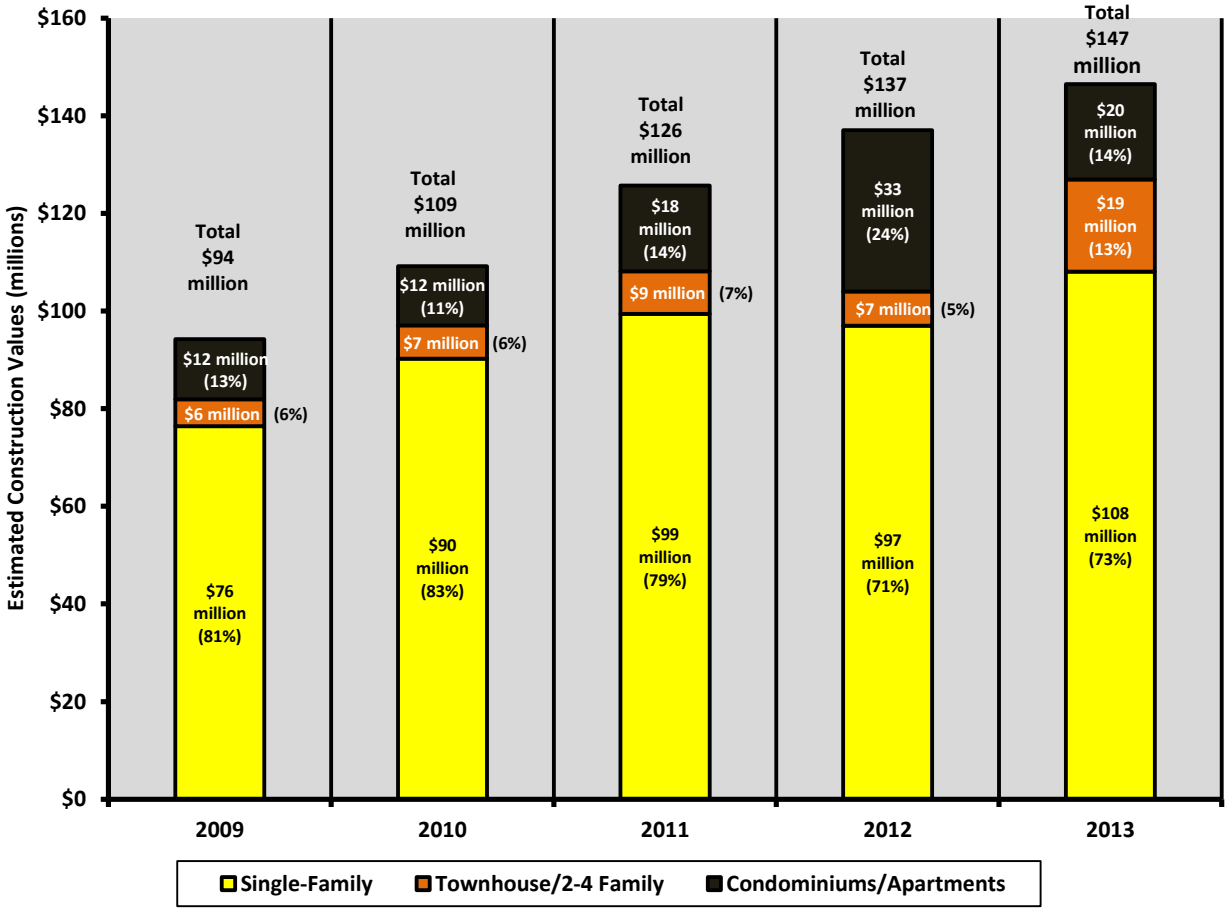


Source: Winston-Salem/Planning and Development Services Department
www.cityofws.org/departments/inspections

(Note: The estimated new nonresidential construction values above do not include the value of signs, transmission towers, accessory structures and other uses that are reported as a whole and are unable to be allocated to office, retail, institutional or industrial uses.)

Estimated New Residential Construction Values by Housing Type (2009–2013)

New residential construction values have risen steadily since 2009. Single-family dwelling construction values have risen by 93% since 2009 to $147 million in 2013. Townhome/2 to 4 family dwelling construction values remained steady in the $7 million to $9 million range each year from 2010 to 2012, before increasing to almost $20 million in 2013. Condominium/ apartment construction values dropped from the $30 million to $40 million range between 2005 and 2007 to between $10 and $20 million between 2009 and 2011. Condominium/ apartment construction values have rebounded to the $20 million to $30 million annual range for 2012 and 2013 from $12 million for 2009 and 2010. New construction values still remain one-third to one-half of the construction values from 2001 to 2006.

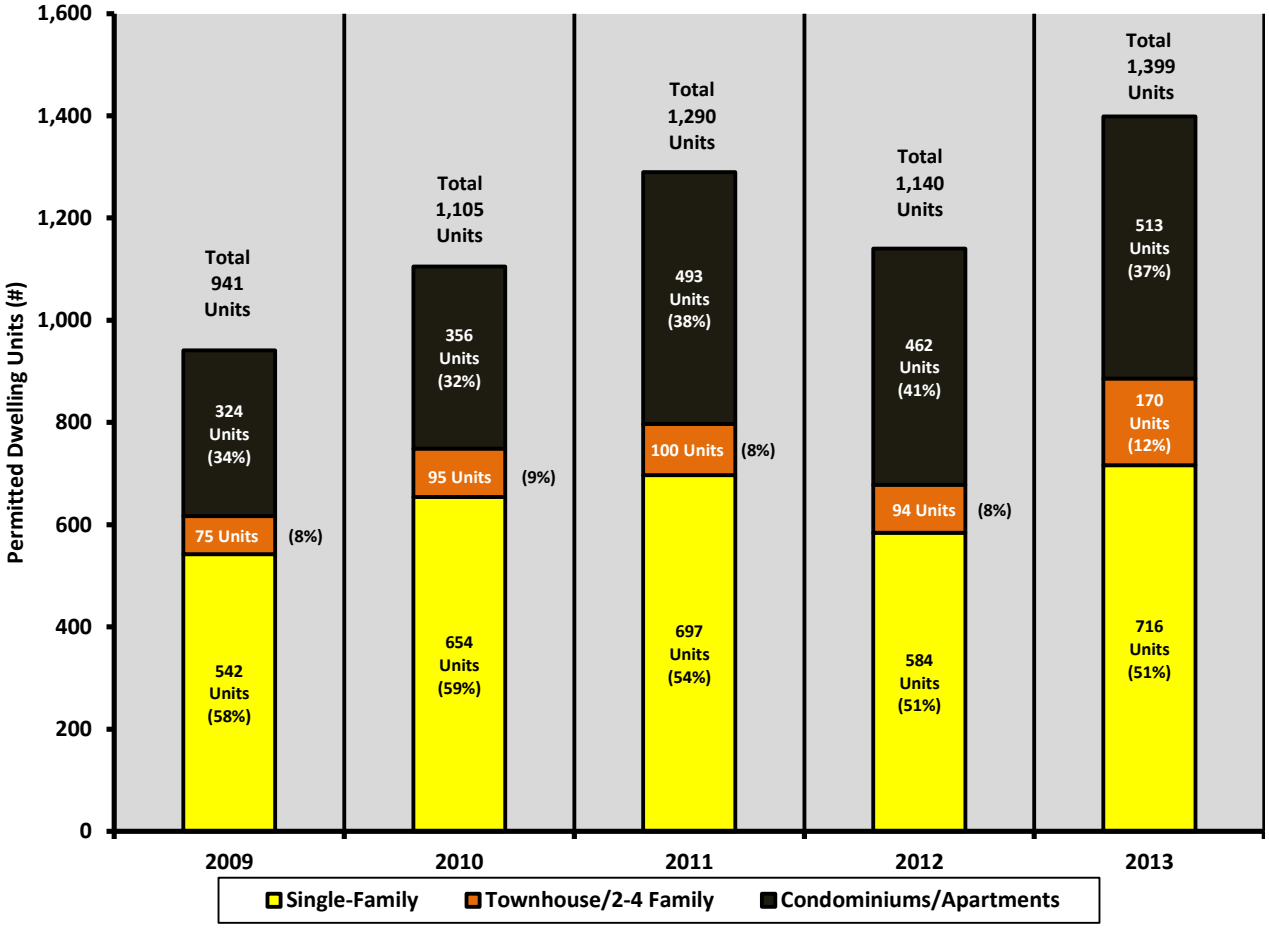


Source: McGraw Hill Construction Dodge Reports
www.construction.com/dodge/

Housing Type	Typical Total Annual New Residential Construction Values	Previous Years Typical
Single-family	$90 million - $110 million	$200 million - $300 million
Townhouse/2-4 Family	$5 million - $15 million	$20 million - $25 million
Condominium/ Apartments	$10 million - $20 million	$30 million - $40 million

Number of New Residential Dwelling Units by Type (2009–2013)

The number of single-family dwelling units has remained in the 500 to 700 units per year between 2009 and 2013. The number of condominium/ apartment units constructed annually has remained in the 300 units to 500 units range since 2009. Between 2009 and 2013, the number of townhouse/2-4 dwelling units constructed each year has remained in the 100 units to 200 units range. The total residential dwelling units constructed each year since 2010 has been between 1,100 units and 1,400 units. The number of dwelling units constructed for all types of residential dwelling units between 2009 and 2013 are about one-third to one-half the levels during the boom years of 2001-2006.

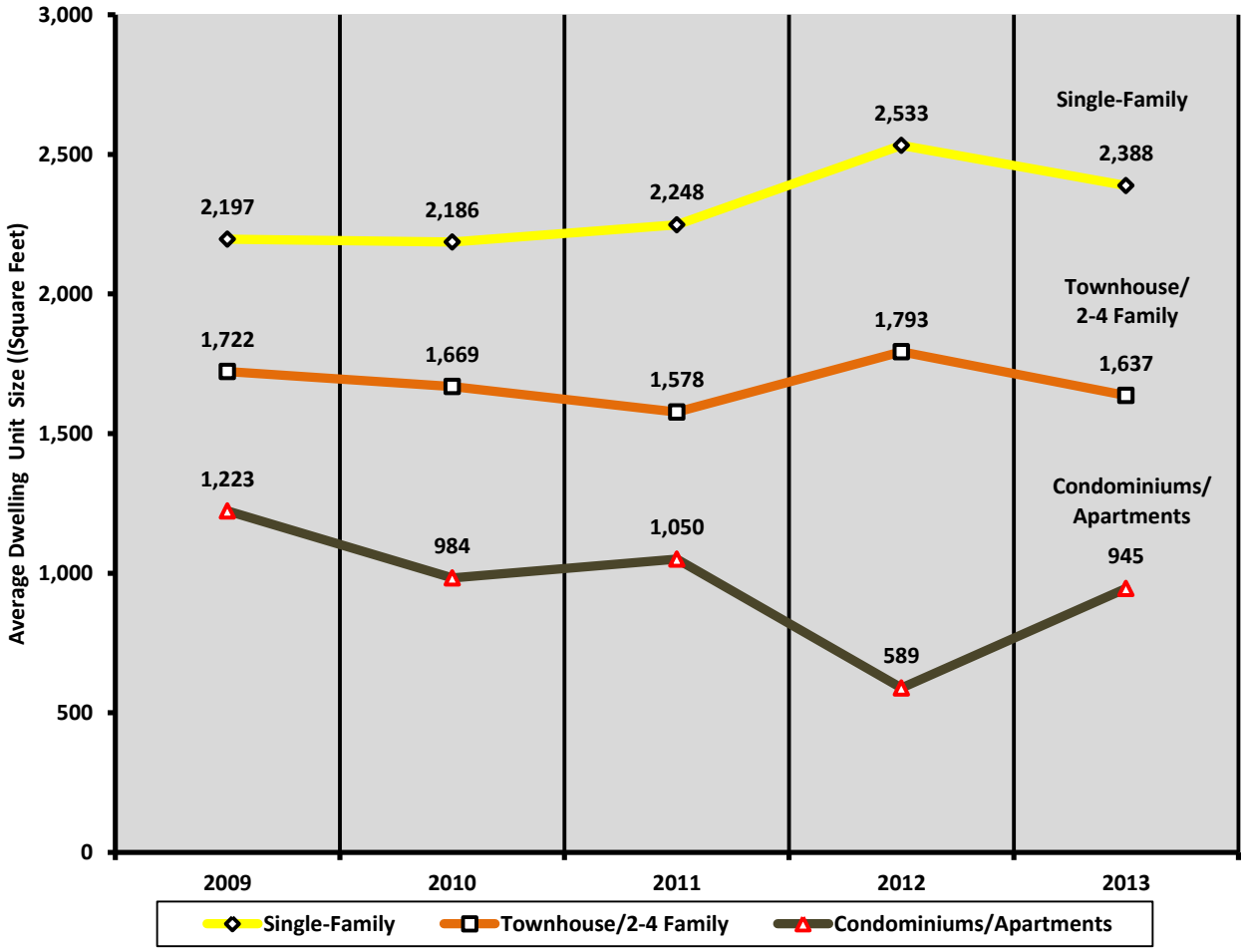


Source: Source: McGraw Hill Construction Dodge Reports
www.construction.com/dodge/

Housing Type	2009-2013 Typical Annual New Dwelling Units Built	Previous Years Typical
Single-family	550 - 700	1,500 – 2,000
Townhouse/2-4 Family	100 - 150	200 - 300
Condominium/ Apartments	300 - 500	700 – 1,000
Total	950 – 1,300	2,400 – 3,300

Average New Residential Dwelling Size by Housing Type (2009–2013)

Though the average sizes of all housing types have fluctuated somewhat between 2009 and 2013, all have generally remained within a 300 square foot variation since 2001. The average size of single-family dwellings has generally been between 2,100 and 2,400 square feet with a low of 1,822 square feet in 2004 and a high of 2,533 square feet in 2012. The average size of townhouses/ 2-4 family dwellings has remained in the 1,500 square foot to 1,800 square foot range since 2007. Condominiums/ apartments have had the most fluctuation in size ranging from a high of 1,751 square feet in 2005 to a low of 589 square feet in 2012 when the Lofts at Little Creek were constructed at the Shoppes at Little Creek. Typically, condominiums/ apartments have ranged between 900 square feet and 1,200 square feet.

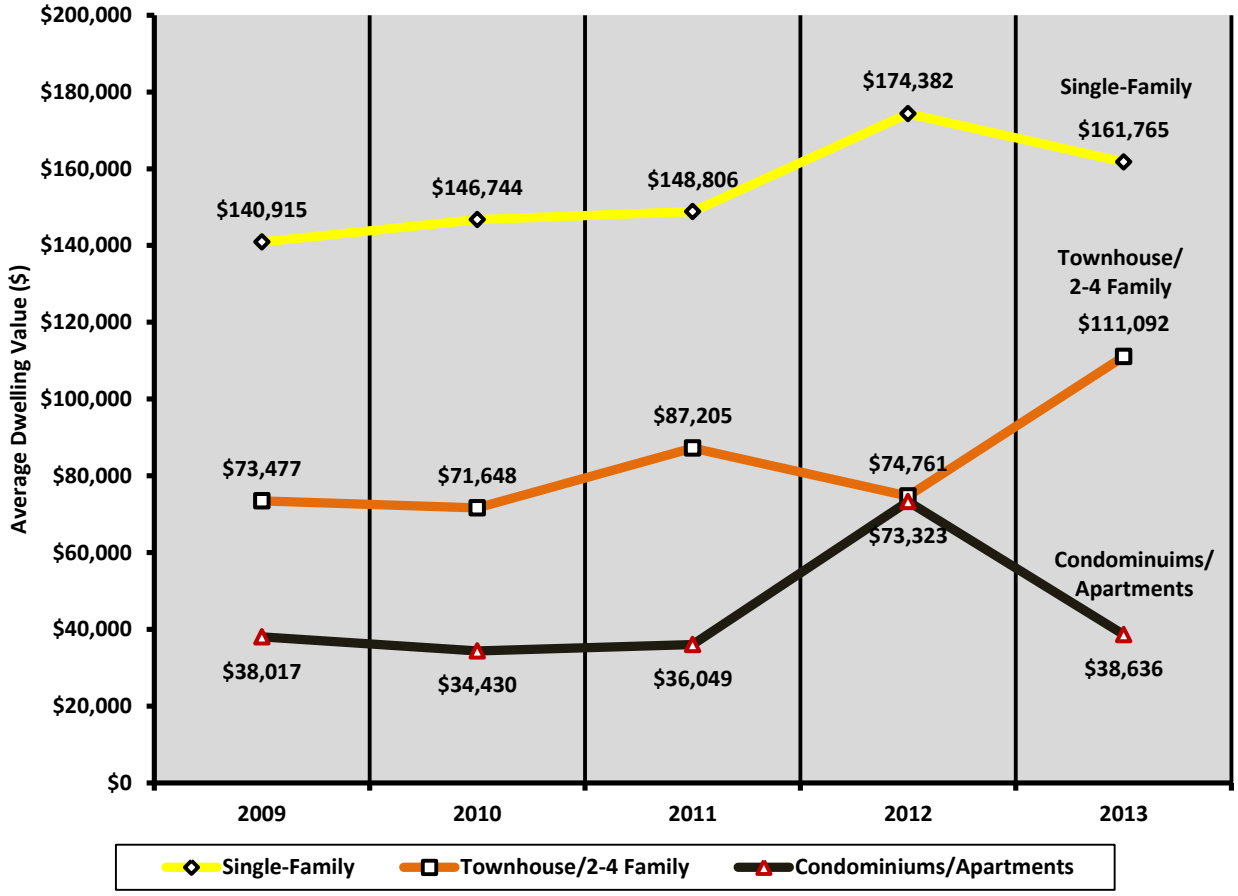


Source: McGraw Hill Construction Dodge Reports
www.construction.com/dodge/

Housing Type	2009-2013 Typical Annual New Dwelling Unit Size (Square Feet)	Previous Years Typical
Single-family	2,200– 2,400	2,100-2,300
Townhouse/2-4 Family	1,600-1,800	1,500-1,700
Condominium/ Apartments	900-1,000	900-1,200

Estimated Average New Residential Dwelling Construction Value by Type (2009–2013)

Overall, the average construction value ranges of new single-family dwellings, townhouses/ 2-4 dwelling unit structures and condominiums/ apartments have not changed much since 2005, except for some dramatic one-year changes. The average construction value of new single-family homes continued to range between $140,000 and $170,000 between 2009 and 2013. Average construction values for townhouses/ 2-4 unit dwellings continued to range in the $70,000s and $80,000s between 2009 and 2012 before rising to an average value of greater than $110,000 in 2013. The average value of individual condominiums/apartments has been the most stable, ranging between $30,000 and $40,000 per unit, except for 2012 when individual units averaged around $75,000 each.



Source: McGraw Hill Construction Dodge Reports
www.construction.com/dodge/

Housing Type	2009-2013 Typical Annual New Dwelling Units Values	Previous Years Typical
Single-family	$140,000 - $170,000	$140,000 - $170,000
Townhouse/2-4 Family	$70,000-$90,000	$70,000-$90,000
Condominium/ Apartments	$30,000-$40,000	$30,000-$40,000

Real Property Tax Base Trends

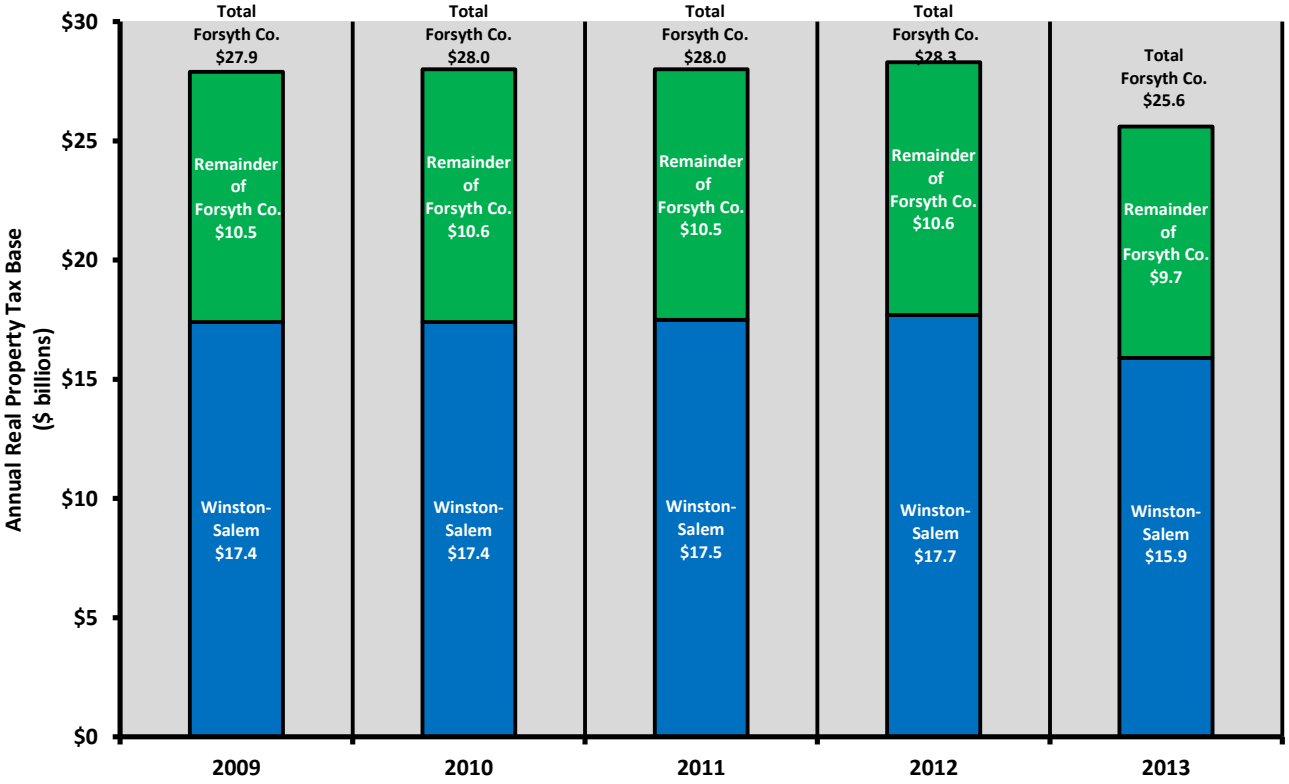
The Legacy 2030 Update states that successful land use regulations, development policies, and public investments that work toward the common good will all contribute to our community's economic attractiveness, tax base, and long-term viability. Tax base trends reflect the overall state of economic conditions and the appreciation or depreciation levels of real property assets.

Trends:

- Forsyth County's real property tax base dropped by 10% in 2013, likely reflecting the drop in single-family dwelling values caused by increased foreclosures and accompanying housing supply glut of the Great Recession (pp. 42-43).

Forsyth County, Winston-Salem and the Remainder of Forsyth County Real Property Tax Bases (2009-2013)

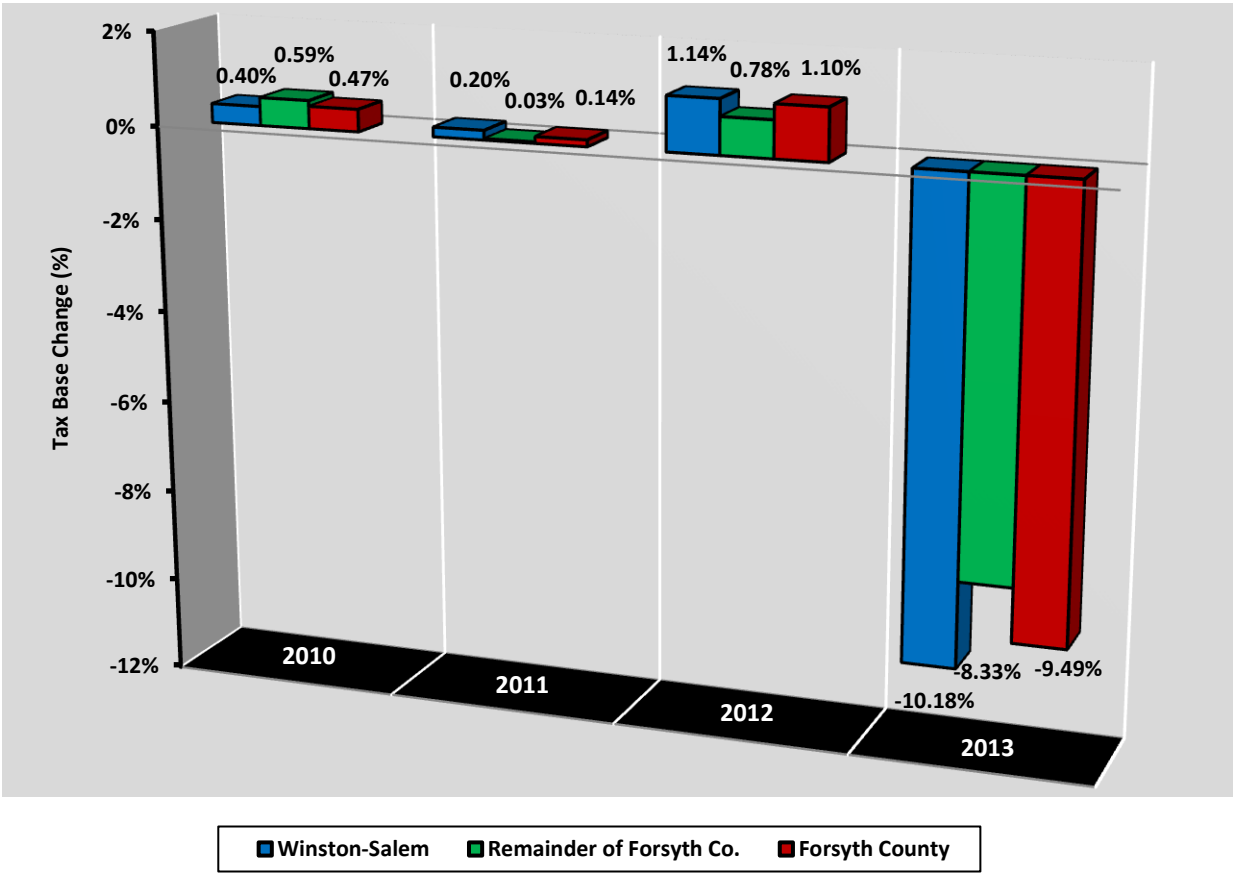
The real property tax bases have remained stable for all of Forsyth County between 2009 and 2012, despite a revaluation of property in 2010. Winston-Salem's real property tax base has hovered between $17.4 billion and $17.7 billion with the rest of Forsyth County's real property tax base remaining at $10.6 billion. Forsyth County's total real property tax base has remained constant at around $28 billion between 2009 and 2012. The County's real property revaluation of 2013 dropped the county's real property tax base by 9.5% from $28.3 billion to $25.6 billion, reflecting the drop in single-family dwelling values caused by increased foreclosures and resulting housing supply glut of the Great Recession.



Source: Forsyth County Tax Administration Department TR-1 Reports

Forsyth County, Winston-Salem and the Remainder of Forsyth County Real Property Tax Base Change (2010-2013)

Winston-Salem, the remainder of Forsyth County and the county as a whole all experienced slight increases in real property tax base of between 0.14% to 1.10% between 2010 and 2012, before dropping by 9.5% in 2013 due to revaluation.



Source: Forsyth County Tax Administration Department TR-1 Reports

Community Health Trends

The Legacy 2030 Update reports that air pollution has been an issue for the Piedmont Triad for a number of years. The Environmental Protection Agency has set National Ambient Air Quality Standards for six common air pollutants, as required by the Clean Air Act, with ground level ozone and particulate matter being the greatest concern to human health.

The Legacy 2030 Update also supports ongoing and improved monitoring of health outcomes to measure the effectiveness of policies and programs to improve health and to reduce health disparities.

Trends:

- Air quality generally improved in Forsyth County between 2008 and 2012 based on the Air Quality Index (p. 45).
- Forsyth County ranks last among the five most populated counties in its overall statewide county health ranking, which is 26th among the 100 NC counties (p. 46).
- Forsyth County's community health statistics have shown little change since 2010, except for a significant increase in the number of children living in poverty from 22% to 32% (p. 47).

Photograph: Forsyth County

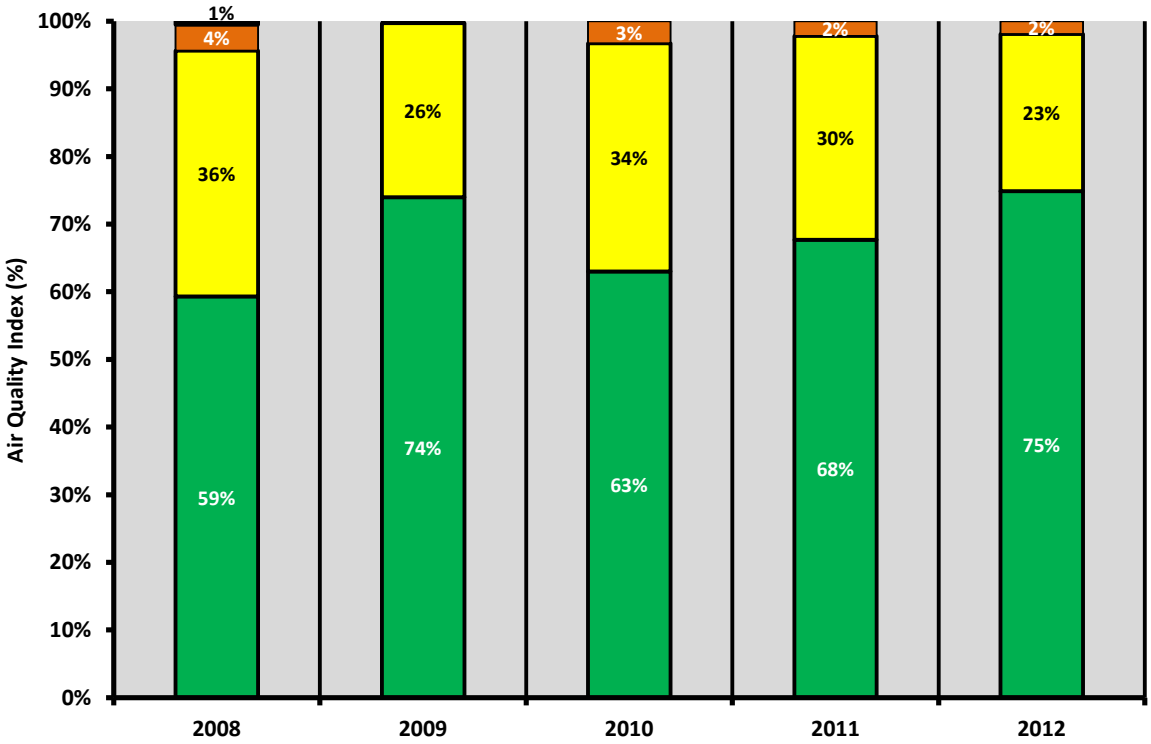
Forsyth County Overall Air Quality Index (AQI) (2008-2012)

The Air Quality Index (AQI) has a range that runs from 0 to 500. When there is a higher AQI value, there is a greater level of air pollution and a greater health concern. An AQI value of 100 generally corresponds to the national air quality standard for the pollutant, which is the level the Environmental Protection Agency has set to protect public health.

The four levels of the nationwide Air Quality Index pertinent to Forsyth County and their health concerns are:

- Green = "Good" - AQI is 0 - 50. Air quality is considered satisfactory, and air pollution poses little or no risk.
- Yellow = "Moderate" - AQI is 51 - 100. Air quality is acceptable; however, for some pollutants there may be a moderate health concern for a very small number of people.
- Orange = "Unhealthy for Sensitive Groups" - AQI is 101 - 150. Although general public is not likely to be affected at this AQI range, people with heart and lung disease, older adults and children are at a greater risk from exposure.
- Red = "Unhealthy" - AQI is 151 - 200. Everyone may begin to experience some adverse health effects, and members of the sensitive groups may experience more serious effects.

Based on the AQI, air quality appears to have generally improved between 2008 and 2012. The proportion of "Green" AQI days has increased from 59% in 2008 to 75% in 2012. The percentage of "Yellow" AQI days has decreased from 36% in 2008 to 23% in 2012. The portion of "Orange" days has decreased from 4% (or 15 days per year) to 2% (7 days per year). The number of "Red" days has decreased from 1% in 2008 to 0% between 2009 and 2012.



Source: Forsyth County Office of Environmental Assistance and Protection

Five Most Populated North Carolina Counties Selected Community Health Statistics Comparison (2014)

Since the connection between the physical environment and public health has been emphasized on a community wide basis only in the last decade, new statistics as well as the refinement of methodologies for older statistics are still emerging. The best evaluation tool for Forsyth County for community wide health may be to compare it with the other four most populated counties in North Carolina: Wake County, Mecklenburg County, Guilford County and Durham County.

Forsyth County ranks last among the five most populated counties in its overall statewide county health ranking and 26th among the 100 NC counties. Forsyth County also has the highest percentage of adult smokers at 20%, the highest percentage of people with limited access to healthy foods at 12% and the highest percentage of children living in poverty at 32%. Forsyth County ranks first among the five counties with the lowest percentage of excessive drinking at 12% and is tied for first with the lowest percentage of people that could not see a doctor due to costs at 13%.

Further information is available from the annual Forsyth County Health Rankings Reports found at the Forsyth County Department of Public Health website:
http://www.co.forsyth.nc.us/PublicHealth/publications.aspx

Health Statistic	Wake County	Mecklenburg County	Guilford County	Durham County	Forsyth County	Forsyth Co. Rank Among 5 Counties
NC County Overall Health Ranking (1 to 100)	1	6	13	17	26	5
% Adults with No Health Insurance	15%	18%	19%	19%	19%	T-3
% Could Not See Doctor Due to Costs	13%	16%	14%	16%	13%	T-1
% in Poor or Fair Health	11%	14%	12%	17%	14%	T-3
% Adult Smoking	13%	14%	17%	14%	20%	5
% Excessive Drinking	15%	16%	13%	15%	12%	1
% Adult Obesity	25%	26%	27%	29%	26%	T-2
% Physical Inactivity	19%	21%	24%	20%	22%	4
% Limited Access to Healthy Foods	4%	7%	7%	6%	12%	5
% Children in Poverty	15%	22%	25%	28%	32%	5
% High Housing Costs	31%	35%	34%	36%	32%	2
Population per Primary Care Physician	1,243	1,156	1,342	809	997	2
Population per Dentist	1,609	1,567	1,955	1,465	1,728	4

n/a – not available

Source: University of Wisconsin, Population Health Institute
www.countyhealthrankings.org

Forsyth County Selected Community Health Statistics (2010 – 2013)

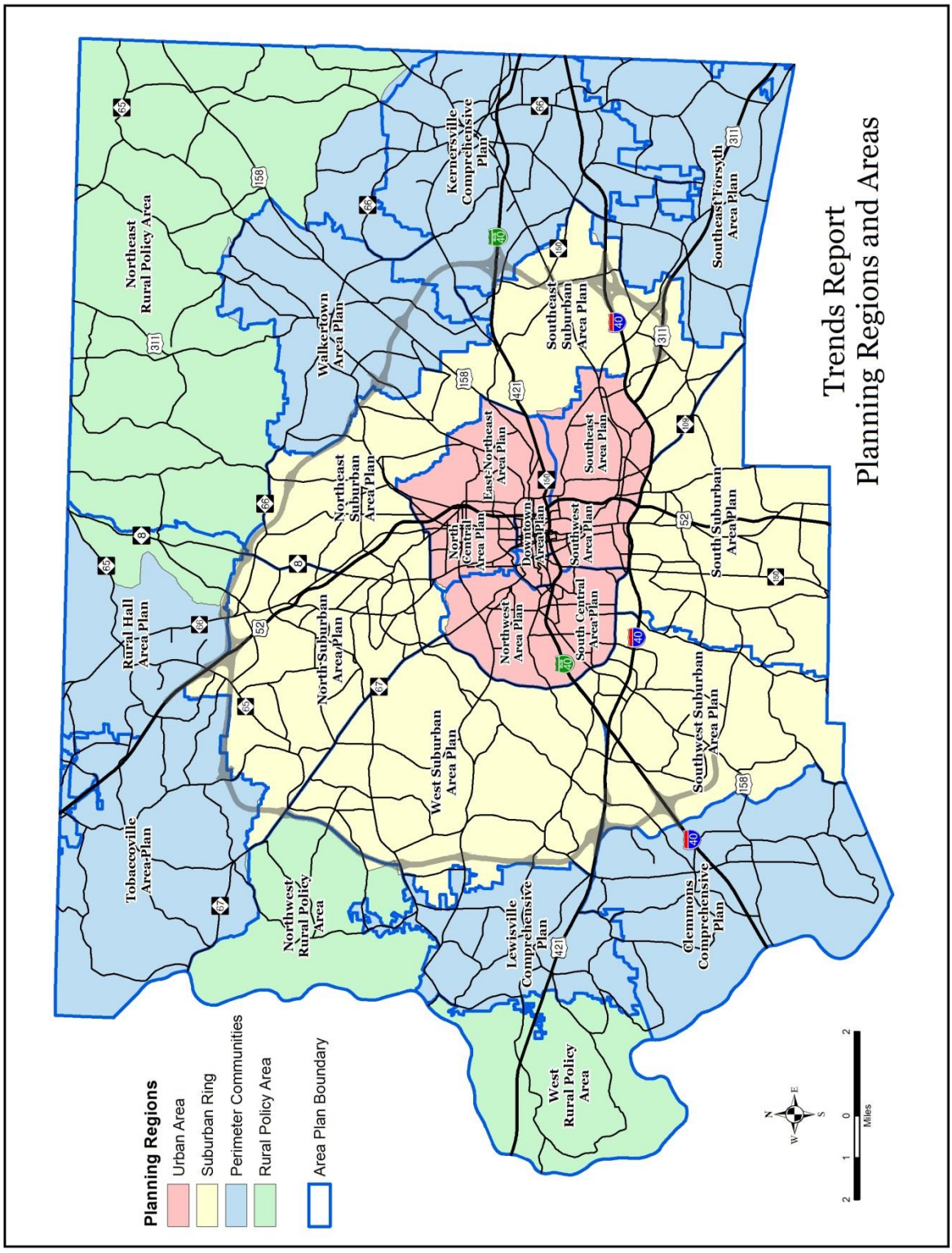
Forsyth County's community health statistics have shown little change since 2010, except in the percentage of children living in poverty, highlighted in gray. The percentage of children living in poverty increased from 22% to 32% between 2010 and 2014.

Forsyth County	2010	2011	2012	2013	2014
% Adults with No Health Insurance	17%	20%	17%	19%	19%
Top U.S. Performers*	14%	13%	11%	11%	11%
% Could Not See Doctor Due to Costs	n/a	n/a	13%	13%	13%
Top U.S. Performers*	n/a	n/a	n/a	n/a	n/a
% in Poor or Fair Health	13%	14%	14%	15%	14%
N Top U.S. Performers	15%	10%	10%	10%	10%
% Adult Smoking	20%	25%	21%	20%	20%
Top U.S. Performers*	20%	10%	14%	13%	14%
% Excessive Drinking	11%	12%	13%	13%	12%
Top U.S. Performers*	5%	8%	8%	7%	10%
% Adult Obesity	25%	25%	26%	26%	26%
Top U.S. Performers*	24%	25%	25%	25%	25%
% Physical Inactivity	n/a	n/a	21%	21%	22%
Top U.S. Performers*	n/a	n/a	21%	21%	21%
% Limited Access to Healthy Foods	n/a	12%	11%	12%	12%
Top U.S. Performers*	n/a	8%	0%	1%	n/a
% Fast Food Restaurants	n/a	n/a	47%	47%	n/a
Top U.S. Performers*	n/a	n/a	25%	27%	n/a
% Children in Poverty	22%	21%	24%	28%	32%
Top U.S. Performers*	15%	11%	13%	14%	13%
% High Housing Costs	n/a	31%	32%	32%	n/a
Top U.S. Performers*	n/a	n/a	n/a	n/a	n/a
Population per Recreation Facility	n/a	6,250	6,667	7,099	n/a
Top U.S. Performers*	n/a	5,882	6,250	6,250	n/a
Population per Primary Care Physician	n/a	n/a	n/a	1,021	997
Top U.S. Performers*	n/a	n/a	n/a	1,067	1,051
Population per Dentist	n/a	n/a	n/a	1,788	1,728
Top U.S. Performers*	n/a	n/a	n/a	1,516	1,439

* 90th percentile, i.e., only 10% are better.
n/a – not available

Source: University of Wisconsin, Population Health Institute
www.countyhealthrankings.org

Individual Planning Area Profiles



Individual Planning Area Profiles

The tables on the following two pages show a brief demographic profile of the 20 designated planning areas for Forsyth County (see map on previous page) by providing population estimates, population density and diversity estimates. The estimated number of units in structures, estimated educational attainment and estimated housing tenure for individual planning areas are found on the opposite page.

Planning Area/Region	Population Estimates				Diversity Estimates (2010) (Percent)		
	2010	2000	Percent Change (2000-2010)	2010 Density (Persons per Acre)	African-American	Hispanic	White
Forsyth County	351,798	306,067	+ 15	1.3	26	12	59
Winston-Salem	230,345	185,776	+ 24	2.7	33	14	48
Downtown	2,541	1,092	+ 133	6.5	45	6	45
Urban Area	67,718	68,907	- 3	3.7	47	16	35
East-Northeast	14,356	16,239	- 12	3.6	80	13	4
North Central	9,120	8,233	+ 10	4.7	74	15	8
Northwest	9,425	10,325	- 9	2.4	7	2	88
South Central	11,159	11,546	- 4	4.4	36	16	44
Southeast	13,185	13,173	0	3.4	56	27	15
Southwest	10,374	9,812	+ 6	4.7	11	18	66
Suburban Ring	168,042	136,442	+ 23	2.0	28	14	54
North Suburban	33,708	31,763	+ 6	2.3	36	18	42
Northeast Suburban	15,424	15,407	0	1.5	52	14	31
South Suburban	32,219	23,651	+ 36	2.1	32	21	44
Southeast Suburban	18.380	11,479	+ 60	1.7	24	19	53
Southwest Suburban	21,819	12,356	+ 77	1.6	25	9	60
West Suburban	46,492	41,786	+ 11	2.4	13	7	75
Perimeter Communities	95,654	83,212	+ 15	1.0	10	7	80
Clemmons	23,383	19,828	+ 18	1.3	6	7	82
Kernersville	29,366	27,346	+ 7	1.5	10	9	77
Lewisville	9,393	10,487	- 10	1.1	5	4	88
Rural Hall	7,609	4,513	+ 69	0.9	19	8	70
Southeast Forsyth Co.	10,658	7,832	+ 36	0.6	9	6	82
Tobaccoville	5,644	4,954	+ 14	0.3	8	3	87
Walkertown	9,602	8,252	+ 16	0.9	18	7	73
Rural Areas	17,441	15,823	+ 10	0.3	6	5	87
Northeast	11,083	11,657	+ 5	0.3	7	6	85
Northwest	3,337	2,680	+ 25	0.3	7	3	88
West	3,021	1,486	+103	0.3	3	2	93
Other Communities	629	636	- 1	1.2	5	2	90
High Point (part)	8	6	+ 33	0.6	0	0	100
King (part)	621	630	- 1	1.2	5	2	90

Sources: United States Census Bureau: 2000 Census, 2010 Census, American Community Survey, 2008-2012 5-year estimates;

Individual Planning Area Profiles

Planning Area	# Housing Units in Structure (2012) (Percent)			Education (2012) (Percent)		Housing Tenure* (2012) (Percent)	
	Single-Family Detached Dwellings	2 to 4 Dwelling Units	4 or more Dwelling Units	High School Diploma	Bachelor's Degree	Owner-Occupied	Renter-Occupied
Forsyth County	68	5	20	88	37	57	31
Winston-Salem	63	6	25	86	38	51	36
Downtown	**8**	**14**	**74**	**76**	**39**	**14**	**65**
Urban Area	**65**	**13**	**20**	**82**	**37**	**39**	**44**
East-Northeast	56	17	25	74	13	26	56
North Central	61	14	24	77	15	29	53
Northwest	80	5	10	98	87	69	18
South Central	46	17	32	81	38	26	51
Southeast	81	6	11	70	12	40	41
Southwest	68	14	17	89	55	49	40
Suburban Ring	**64**	**3**	**26**	**87**	**38**	**56**	**33**
North Suburban	43	4	47	80	26	34	53
Northeast Suburban	90	1	3	81	16	64	26
South Suburban	66	3	23	84	2	57	30
Southeast Suburban	77	3	14	85	26	66	26
Southwest Suburban	58	2	27	94	39	59	32
West Suburban	66	3	35	94	61	64	26
Perimeter Communities	**76**	**3**	**12**	**91**	**34**	**69**	**22**
Clemmons	76	3	13	94	53	72	19
Kernersville	62	5	22	89	32	59	32
Lewisville	87	1	8	93	48	81	10
Rural Hall	86	2	7	87	27	70	23
Southeast Forsyth Co.	85	0	8	91	30	74	19
Tobaccoville	86	1	1	89	25	80	14
Walkertown	86	1	1	86	19	69	19
Rural Areas	**85**	**1**	**3**	**87**	**30**	**79**	**13**
Northeast	81	1	3	85	25	76	16
Northwest	94	0	1	88	38	85	9
West	98	0	1	95	46	92	3
Other Communities	**88**	**0**	**0**	**89**	**29**	**74**	**16**
High Point (part)	81	0	0	93	22	73	16
King (part)	90	0	0	88	31	75	16

**The percent vacancy rate for individual planning areas can be estimated by adding the % owner-occupied to % renter-occupied and subtracting from 100%.*

Source: United States Census Bureau: 2000 Census, American Community Survey, 2008-2012 5-year estimates.

Acknowledgements

(Note: Since this report is for information purposes only, it has not been adopted by the Planning Board or the elected local government officials of Winston-Salem or Forsyth County.)

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2013
Forsyth County Trends

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Winston-Salem/Forsyth County
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