CHAPTER 2
Updated Trends
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Winston-Salem, Forsyth County and its towns are going through several demographic changes and economic trends that will continue through the year 2030. To determine where we as a community want to go and how we will get there, it is important to understand four factors:

1) North Carolina, the Piedmont Crescent, the Triad, and Forsyth County are growing faster than previously projected;
2) With expected population growth, Forsyth County and Winston-Salem will run out of developable land in as few as 24 years if the low-density development trends of the last several decades continue;
3) Future employment growth will most likely occur in the service and knowledge-based sectors with higher-paying jobs requiring higher levels of education; and,
4) Population diversity is increasing racially, ethnically, and generationally; yet social, health, and economic disparities remain.

Each of these trends is explored in more detail below.

Regional Growth Trends

Piedmont Crescent

The 31-county Piedmont Crescent of North and South Carolina (Map 2-1), which includes the Triangle, Triad, and Charlotte metropolitan regions, is one of the fastest growing areas in the country and includes over 60 percent of North Carolina’s population. By 2030, the Charlotte metropolitan area is projected to contain more than 3 million people, the Triangle area nearly 2.75 million and the Triad 2 million. While Forsyth and Guilford Counties have not grown as quickly as Mecklenburg, Wake, and Durham Counties, the Triad’s central location and good transportation network may accelerate future growth.

Piedmont Triad

Forsyth and Guilford Counties function as the urban center for the 10-county Piedmont Triad combined metropolitan region (Maps 2-2 and 2-3), which is ranked 31st nationally in population. Between 2000 and 2010, the Piedmont Triad Region grew from 1.4 million to 1.6 million people. During the same time, the population of the urbanized counties of Forsyth and Guilford grew from 730,000 to 845,000 people. In fact, Forsyth County has grown at a faster average yearly rate than previous projections have indicated, resulting in 43,000 more people than anticipated in the last 35 years. In 2008, the state demographer projected that Forsyth County’s population will grow from 351,000 to 471,000 a projected increase of 120,000 people. At the same time, North Carolina is expected to grow by another 3.5 million people with two-thirds of that
growth occurring in the three metro regions of the Piedmont Crescent. Employment in Forsyth County is expected to grow by 66,000 jobs for a total of 295,000 people employed. Land for new housing, institutional and employment sites will be needed to accommodate these projected increases. We will need to closely consider where and how we develop Forsyth County as we plan for this new growth.

Forsyth County Population Projections, Density, and the Demand for Land

Development Density

Forsyth County’s current growth trend, and its growth trend for the past several decades, has been for fairly low-density development in both residential and nonresidential development. Residential density trends (Figure 2-1) show a substantial drop in Winston-Salem since 1920, when more traditional growth patterns were the norm (see Chapter 3, Growth Management, for a detailed discussion on historic growth patterns). This trend toward less dense development shows no sign of slowing.

Between 1980 and 2010, Winston-Salem’s population increased by more than 75 percent, from 132,000 to 235,000 people; however, the
developed land area during this time grew at a much higher rate of 115 percent (Map 2-4). The result is an 18 percent decrease in Winston-Salem’s density, from 3.3 persons per acre in 1980 to 2.7 persons per acre in 2010. These numbers reflect the trend of larger lot, lower density suburban development as well as the trend of decreasing household sizes. Forsyth County’s towns have seen even lower-density development in the past several decades than Winston-Salem, ranging from 0.6 to 2.4 persons per acre. The density of non-residential development has decreased as well, primarily in the form of larger, one-story commercial, institutional and industrial structures with large parking lots and new roads to serve them. “Greenfield” sites, which are previously undeveloped, have been seen as desirable in our community for employment and schools, while redevelopment is undesirable due to the perception it is costly and full of uncertainty.

The emphasis on low-density development creates several problems for our community. First, low-density development yields less tax revenue on a per-acre basis and costs more to serve than comparable development at higher densities. The revenue generated by low-density development often does not keep pace with the cost of new service expenditures to that development, especially for transportation infrastructure. Additionally, low-density development and sprawling growth cause numerous other problems, including: traffic congestion; loss of open space, wildlife habitats and trees; diminished air quality; and, the tendency to segregate our citizens by race and income. A more startling impact is the near-term potential to use all of Forsyth County’s remaining undeveloped land.

Land Demand and Build-Out
Forsyth County is relatively small in its geographic area compared to other urbanized counties in North Carolina. Our growth is also limited by our topography. Approximately one third of the county is outside the “serviceable land area” of the Muddy Creek Basin (Map 2-5), the area that can be easily and efficiently served by sewer. Development outside this area is difficult and expensive.

A geographic analysis of land availability (Map 2-6 and Figure 2-2) and current tax records shows that of Forsyth County’s 201,000 acres of serviceable land area, 42 percent is considered developed; 10 percent is
designated as public rights-of-way; 3 percent is used for parks, recreation or schools; and 6 percent is located within undevelopable floodplains. The total amount of land for these classifications is approximately 112,000 acres, which is 61 percent of the total serviceable land area. This leaves approximately 70,000 acres (39 percent) vacant or underdeveloped and thus available for future development. With only 70,000 acres of developable land left, a continued pattern of low-density development paired with a large increase in population could have drastic consequences. Forsyth County, Winston-Salem, and some of Forsyth County’s towns could reach build-out populations in a little more than 24 years (year 2037). “Build-out” is defined here as the development of all land within the serviceable land area. All jurisdictions in Forsyth County are faced with a finite land area for outward expansion, reinforcing the need for more economically-sustainable development as a means to accommodate population, job, and tax-base growth, while keeping tax rates low.

If early build-out does occur, we could face a future where housing and job opportunities are increasingly pushed outward to other counties due to a lack of available and desirable development sites in Forsyth County and its municipalities.
Future Growth Scenarios
Our community has an opportunity to influence the development patterns we will experience in the future. To demonstrate the consequences of continued low-density development, the Planning Department analyzed three hypothetical scenarios with varying development densities. Each scenario recognizes that there are 70,000 acres of serviceable land area that may be developed. Each scenario presumes an averaging of densities over the area. Individual development projects will vary and may include low-density subdivisions, townhouses, and various types of multifamily development, with only the amount of each type/density of residential development varying between scenarios.

- **Scenario 1: Continued Low-Density Development** – Future density based on the trends of the past 30 years from 1980-2010 (2.25 persons per acre);
- **Scenario 2: Moderate-Density Future Development** – Future density based on doubling the average development density of the past 30 years (4.5 persons per acre); and,
- **Scenario 3: High-Density Future Development** – Future density based on an even higher overall density (6.0 persons per acre). This scenario takes into account a national trend toward denser urban lifestyles.

Under Scenarios 2 and 3, more people would locate within Winston-Salem’s Center City area, allowing for both new development and redevelopment at higher densities. Scenario 3 presumes that the Center City, which includes the Downtown core (see Chapter 10, Downtown and the Center City), will attract 16,000 new residents or approximately 13.3 percent of the anticipated 120,000 increase in Forsyth County’s population by the year 2030.

![Figure 2-3. Future Land Threshold Scenarios](image)

Population numbers can also be calculated for the three development scenarios. Scenario 1, the low-density alternative, would allow for an additional 310,000 people for a total population by 2056 of around 660,000 people. Scenario 3, the higher-density option, would permit an additional 425,000 people for a county population of nearly 775,000 people by 2087.

Scenario 1 represents a do-nothing approach that may result in the consumption of our serviceable land area in only 24 years, just beyond the time frame of Legacy 2030. This scenario will also cap our county population at just 510,000 people and drive potential new residents and jobs out to surrounding counties. Continued low-density development will also result in the need for a larger amount of new dispersed infrastructure (additional roads and road widening, fire stations, libraries, school locations, utilities, parks, and
Future Employment Opportunities and Trends

According to the Bureau of Labor Statistics (BLS), employment in the United States is expected to increase from 143 million to 164 million by 2020. Of that, close to half of jobs are expected to be in the service or knowledge-based sectors, most notably, professional and business services, health care, social assistance, and construction. Jobs in the industrial and goods-producing sector declined between 2000 and 2010 and are projected to remain static until 2020.

Employment in the Piedmont Triad is projected to increase from 822,000 people in 2010 to a million people in 2030. The majority of this employment growth will continue to be in Forsyth and Guilford Counties, according to projections. Overall, job numbers in Forsyth County are projected to increase from 229,000 to 295,000 between 2010 and 2030, with the number of service-sector jobs increasing and manufacturing jobs decreasing.

Locally, the transition from a goods-producing employment base to a knowledge-intensive, service-oriented economy continues to be challenging. Many of the traditional jobs that paid a family-sustaining wage in the Triad, including textile, cigarette, and furniture manufacturing, no longer exist or have left the Piedmont Triad Region.

Employment will Require Higher Education Levels

The new knowledge-based economy will require higher levels of education for employment. In 2010, 24 percent of the Triad’s population aged 25 or older had attained a bachelor’s degree. By comparison, the Raleigh Metropolitan Statistical Area (MSA) ranked 3rd nationally in educational attainment with 40 percent of its population aged 25 and older possessing a bachelor’s degree.

In general, the higher level of education a job requires, the higher the compensation. The *North Carolina State of the Workforce Report* (2007) studied the wages in many professions in North Carolina and concluded that workers with a bachelor’s degree earn, on average, nearly twice the state’s average wage. Higher education at the post high school level is an important factor in earning a living wage in the new service-oriented economy.

One important reversal of a trend from previous decades is that more college graduates are now choosing to stay or move into Forsyth County instead of leaving for employment opportunities elsewhere. A 2007 *New York Times* article identified Winston-Salem and the Triad as one of only 14 regions across the country that showed more college-educated workers moving in than moving out. As Winston-Salem continues to increase its prominence as an area where more knowledge-based job growth is happening, this trend could result in an increase in the popularity of urban living options for Generation X and Y adults who want to live in close proximity to restaurants, cultural activities, and entertainment.
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<td>1990 Percent of Population</td>
<td>1%</td>
<td>9%</td>
<td>25%</td>
<td>12%</td>
<td>73%</td>
<td>76%</td>
<td>1%</td>
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<td>2010 Percent of Population</td>
<td>12%</td>
<td>16%</td>
<td>26%</td>
<td>12%</td>
<td>59%</td>
<td>64%</td>
<td>2%</td>
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<td>1990-2010 Percent of Population Growth</td>
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<td>47%</td>
<td>28%</td>
<td>14%</td>
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<td>14%</td>
<td>6%</td>
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<td>2010 Median Age</td>
<td>24</td>
<td>27</td>
<td>33</td>
<td>32</td>
<td>42</td>
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<td>32</td>
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<td>2010-2010 Pre-Seniors Growth (55-64 years old)</td>
<td>925%</td>
<td>142%</td>
<td>107%</td>
<td>78%</td>
<td>44%</td>
<td>49%</td>
<td>563%</td>
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<td>2010 Median Household Income</td>
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<td>$35k</td>
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<td>$64k</td>
<td>$69k</td>
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<td>47%</td>
<td>46%</td>
<td>76%</td>
<td>74%</td>
<td>52%</td>
<td>59%</td>
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<td>2010 Percent with High School Degree</td>
<td>51%</td>
<td>62%</td>
<td>86%</td>
<td>81%</td>
<td>90%</td>
<td>90%</td>
<td>92%</td>
<td>86%</td>
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<td>2010 Percent with Bachelor's Degree</td>
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<td>21%</td>
<td>18%</td>
<td>35%</td>
<td>31%</td>
<td>56%</td>
<td>50%</td>
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<td>2010 Percent Living Below Poverty Level of Race/Ethnicity</td>
<td>35%</td>
<td>22%</td>
<td>24%</td>
<td>25%</td>
<td>8%</td>
<td>10%</td>
<td>9%</td>
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<td>2010 Percent Living Below 1/2 of Poverty Level of Race/Ethnicity</td>
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<td>11%</td>
<td>12%</td>
<td>12%</td>
<td>4%</td>
<td>4%</td>
<td>7%</td>
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Table 2-1. Selected Demographics, Forsyth County and United States, 1990 and 2010

Job Skills Gap
The North Carolina State of the Workforce Report (2007) also stated that approximately 60,000 North Carolinians are projected to retire annually in the next decade, many whose jobs may need to be replaced. Although this trend has been slowed by the recession, which required many people of retirement age to work longer, approximately 30,000 new workers are projected to be added to the state’s workforce each year. This leaves a gap of 15,000-30,000 positions to be filled annually, not including net new jobs being created. Since many of the new jobs will require a higher skill and education level, there may be a mismatch between job skills demanded and job skills available.

The Challenge
The trend toward a more educated work force points out three challenges for our community: we must provide more educational opportunities for our local work force; we must encourage the continued transition of our area’s economy to embrace the growth of knowledge-based jobs; and, we must have a quality of life that keeps highly educated, skilled workers in Forsyth County. A high quality of life not only attracts and retains residents, it is also a factor used by corporations when locating in a community. Quality of life is defined by educational opportunities, fiscal soundness, a healthful and attractive environment, modern urban services and amenities, and recreational and cultural opportunities.
Population Diversity

The Brookings Institute’s *State of Metropolitan America* (2010) describes several major national demographic trends from the past decade that can be expected to continue into the next couple of decades, including population diversification, aging population, and income polarization. Each of these trends is rooted deeply in the economic and social fabric of our country and will affect Forsyth County as our region grows and develops.

Diversification

Comparable to the nation’s population growth between 1990 and 2010, non-White population accounted for 82 percent of Forsyth County’s population growth. During the same period, Forsyth County’s proportion of the White population decreased from 73 percent to 59 percent, the proportion of our Hispanic population rose by 11 percent, and the proportion of our African-American population grew by 10 percent (Table 2-1). All three North Carolina Piedmont Crescent Metropolitan Areas ranked in the top 10 nationally in Hispanic population growth over the past decade. Forsyth County’s population is still relatively segregated by race and ethnicity, though the Hispanic population has spread throughout the community instead of being concentrated in the southeast portion of Winston-Salem as it was in the 1980s. Where people live is an indicator of our level of racial harmony. One of our challenges is to find ways to better integrate our community as it grows.

Aging Population

Nationally, seniors and baby boomers now account for more than 100 million people. Larger metropolitan areas in the nation had a 50 percent increase in the pre-senior (55-64 year-olds) population between 2000 and 2010 while the Piedmont Triad had an increase of 40 percent. An aging population presents new opportunities and challenges for transportation options and land use considerations, such as housing and access to shopping and services. Since senior citizens can typically walk several years longer than they can safely drive, mixed-use, walkable communities will become increasingly important.

Income Polarization

The Charlotte MSA and the Raleigh MSA saw real wages (wages adjusted for inflation) rise for high-wage workers between 1999 and 2010, reflecting a national trend of income polarization between high- and low-wage workers. The Triad’s income difference between high- and low-wage workers is actually lower than most communities in the nation. However, all Piedmont North Carolina metropolitan areas saw an increase in the number of people living in poverty between 1999 and 2010. The increase in poverty in the Triad MSA was between 2.5 and 5 percent, while the increase in the Triangle and Charlotte MSAs was between 0 and 2.5 percent.

Income disparities remain among different ethnic and racial groups in Forsyth County. The median household income for African-Americans and Hispanics is 55-60 percent of the
median income for White or Asian households. The number of people living in poverty is two to three times higher for African-Americans and Hispanics when compared to Asians and Whites (roughly 25 percent compared to 10 percent). One factor in this difference is the gap in educational attainment, reflecting a statewide correlation between education attainment and income. Approximately 15-20 percent fewer Hispanics and African-Americans in Forsyth County attain bachelor’s degrees than corresponding White and Asian populations. These disparities are likely to mean differences for citizens of all races in average earning capabilities as well as quality of life considerations, such as housing and transportation choices, access to needed health care, proximity to shopping and jobs, and disposable income for goods and services.

**Conclusion**

Forsyth County’s future success will be measured by the balanced and sustainable ways in which we accommodate our growth. Forsyth County is located in one of the fastest growing areas of the country and our rapid growth presents both problems and opportunities. If we continue to develop our land in the same sprawling manner that we have during the last several decades, we will exhaust our growth potential in as few as 24 years. To change our course, the community will need to consider a different way to grow and prosper.

In addition to changes in our physical environment, we need to embrace changes in how we work. The world economy, as well as our own, is becoming increasingly reliant on knowledge-based industries. Our community will need to provide education, training resources, and job opportunities that support this trend. The nation, our region, and our community are also becoming more diverse in terms of race, age, household composition, and other factors. We need to create neighborhoods and communities that embrace all races, ethnic groups, and incomes, and recognize and celebrate cultural diversity. Income disparities must be addressed through job training and opportunities. All segments of the community need access to goods and services.

Expectations of how we live are changing along with our changing demographics. An increasing percentage of our population, including Generations X and Y and aging citizens, will demand a high quality of life that includes a variety of housing and transportation options and urban amenities in close proximity to where they live. Fortunately, Forsyth County can be in an enviable position to accommodate robust urban growth and still maintain the established character of our suburban and rural landscape. The next chapter explores options for how we can grow and at the same time maintain and improve our quality of life.