



Raleigh-Durham-Chapel Hill, NC MSA

Regulatory Order/Family: Traditional/Middle America

Summary

A low response rate hinders firm conclusions about the state of growth management in the Raleigh MSA. Based on responses from throughout North Carolina, however, all the jurisdictions have zoning, which tends to accommodate high-density development and seldom could be qualified as exclusionary throughout an entire jurisdiction. But a significant minority of cities and counties lack comprehensive plans. And only a minority of jurisdictions in the Raleigh MSA, with 40 percent or less of the population and land area, use such growth management measures as impact fees, APFOs, and urban containment to regulate the timing and location of development. In short, this high-sprawl region does not regulate growth consistently, but rather has a patchwork of local approaches reflecting varying local attitudes toward development.

Governance Framework and Growth Trends

The Raleigh-Durham-Chapel Hill MSA had about 1.2 million residents in 2000, up 39 percent (330,000 residents) in the 1990s. The region has three cities (Raleigh, Durham, and Cary) and two counties (Wake, where Raleigh is located; and Johnston) over 50,000 residents. There are 25 small municipalities (under 10,000 residents) and 6 cities and 4 counties with between 10,000 and 50,000 residents. About 35 percent of the region's population lives in unincorporated areas; incorporated municipalities account for 11 percent of the land area.

Like other metro areas in the mid-South, the Raleigh MSA was already very low-density in 1982—2.7 persons per urban acre—and became even more so in the ensuing 15 years. While its population grew 55 percent between 1982 and 1997, its developed land area grew 82 percent, dropping its density to 2.3 persons per urban acre, a level of density lower than all the other large metros areas except Charlotte. About 9 percent of the land is owned by state, federal, or local governments.

Regulatory Environment

We received markedly lower response rates from metropolitan Raleigh than would be preferable, with only 3 cities and 4 counties represented by the survey. While these jurisdictions account for 67 percent of the metropolitan area's land, they only contain about 17 percent of its population. Hence we present estimates for metro Raleigh—based on responses from both the Raleigh-area respondents and other cities in North Carolina—are very tentative.

We estimate that all the cities in the MSA have zoning. If the municipalities' regulatory framework resembles the average of municipal respondents of similar sizes in North Carolina, a small number (less than 20 percent) restrict density to fewer than 8 dwellings per acre and an even smaller number (perhaps one or two, with a very small share of the metro area population and land area) would exclude our hypothetical apartment development. The majority of municipalities have a



residential density category allowing over 15 dwellings per acre. We have more specific information about the six counties in the MSA. Two or three counties have low-density-only zoning, and one would bar our hypothetical apartment entirely. One county, at the other extreme, accommodates residential development at greater than 15 dwellings per acre. We estimate that about 15 percent of the population and 40 percent of the land area is in jurisdictions with low-density-only zoning, but only 5 percent of the residents and 20 percent of the land area is in jurisdictions that would prohibit the hypothetical apartment development.

Comprehensive planning is not broadly utilized in the Raleigh MSA, with perhaps 15 percent of the municipalities and one or two of the counties lacking a comprehensive plan. For both cities and counties, about 40 percent adopt impact fees; counties tend more often than cities to adopt APFOs (40 percent vs. 20 percent). Urban containment programs are also fairly common among both cities (40 percent) and counties (30 percent). We estimate that most jurisdictions using infrastructure measures are small, with impact fees in place in jurisdictions accounting for about 25 percent of the population and 35 percent of land area. Jurisdictions with urban containment account for 45 percent of the population and 30 percent of the land area.