

*The public comments and data that help define our people and places*

# COMMENTS & CONTEXT

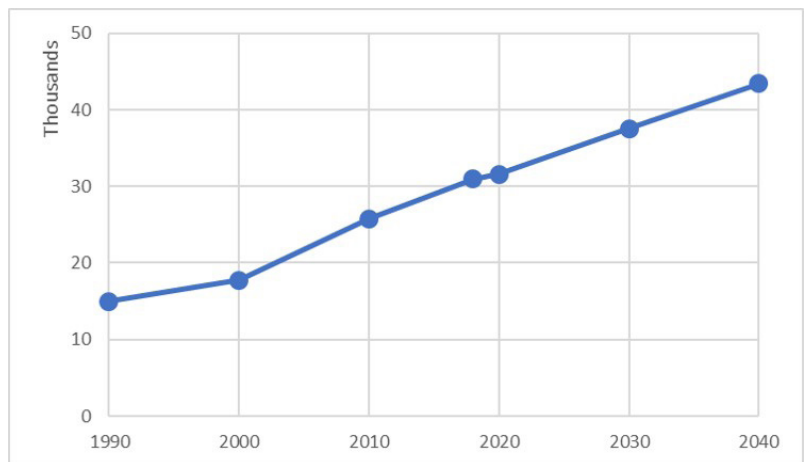
## OUR REGION AND OUR PLACE IN IT

The Town of Garner is located in Wake County, one of the fastest-growing regions in North Carolina.

The Town of Garner is positioned in central North Carolina, south of the capital city of Raleigh. Due to its location near major transportation arteries it has maintained a small-town atmosphere while still enjoying the benefits of accessibility to metropolitan areas, universities, and Research Triangle Park.

Garner is one of Wake County's largest communities, both in terms of population and landmass. From 2000 to 2015, Garner experienced significant growth with a population rate increase of 58 percent, as compared to Wake County (63%), and North Carolina (25%). An internal population estimate conducted in May 2018 reported over 31,000 residents living in the town.

The percentage of adults 55 years old and over in Garner (24.4%) is the highest of any municipality in the county (Wake County, 20.2%). Following the trends of many other similar sized communities, the town is becoming home to an increasing number of empty-nesters.





### **Natural Environments**

Lake Benson (pictured above) is a significant natural resource for the Town: a wildlife habitat, a water resource, and a popular recreational area. The Town of Garner manages over 271 acres of parkland for active use, with more than four miles of paved trails. Nearby White Deer Park, with its Nature Center, first proposed in the Garner Parks and Recreation 1998 Comprehensive Master Plan, was the Town's first nature park. The facility met community expectations to be environmentally sensitive, preserve significant natural areas and wildlife habitats, and have a strong educational focus.

# HISTORIC AND NATURAL ENVIRONMENTS



## The Garner Railroad Station

Garner's origins are linked to the construction of the North Carolina railroad in the 1850's. Prior to its incorporation as a town, Garner was settled before the Revolutionary War, as far back as 1756. Its status solidified when the North Carolina Railroad expanded through the area in 1847, causing significant economic and commercial changes with the construction of a train station. The Town of Garner's Station was established in 1878 and the Town was officially incorporated in 1883.



## Historic District and Landmarks

The Central Highway, now known as US 70, became North Carolina's first paved road in 1916. Garner's position along the Central Highway Project connecting the North Carolina coast and mountains enhanced its visibility and standing. This important historical link both connects Garner to other communities and divides the town itself. The old neighborhoods south of downtown are part of what establishes the small-town feel; and the larger estate homes along the former Central Highway reflect a time when affluent citizens desired a highly visible location along "fashionable" highways.



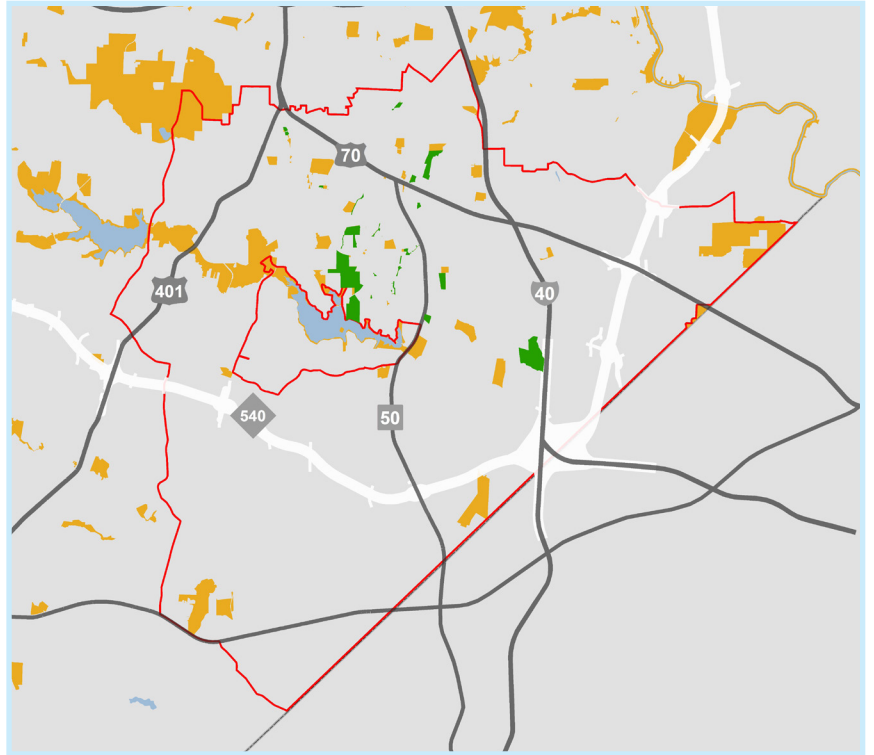
The Downtown Garner Historic District was listed on the National Register of Historic Places in 1989. Garner High School, the Banks House, the Train Depot and several downtown buildings are recognized as Historic Landmarks by the Wake County Historic Preservation Commission.

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## PARKS AND OPEN SPACES

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Garner's parks are depicted in green and public open space, some of which is comprised of school properties, is depicted in gold.

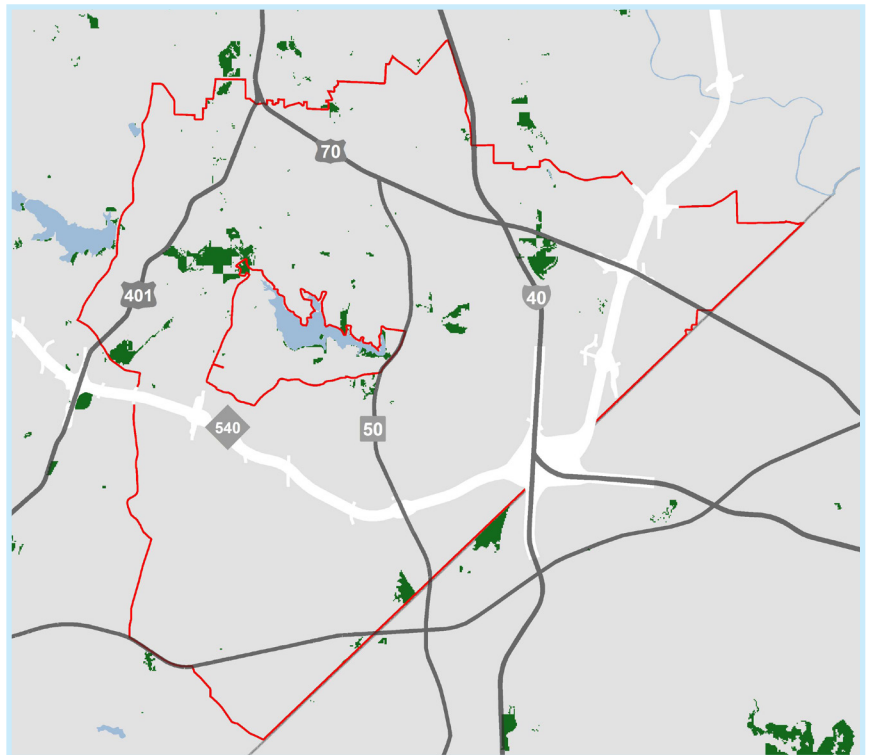


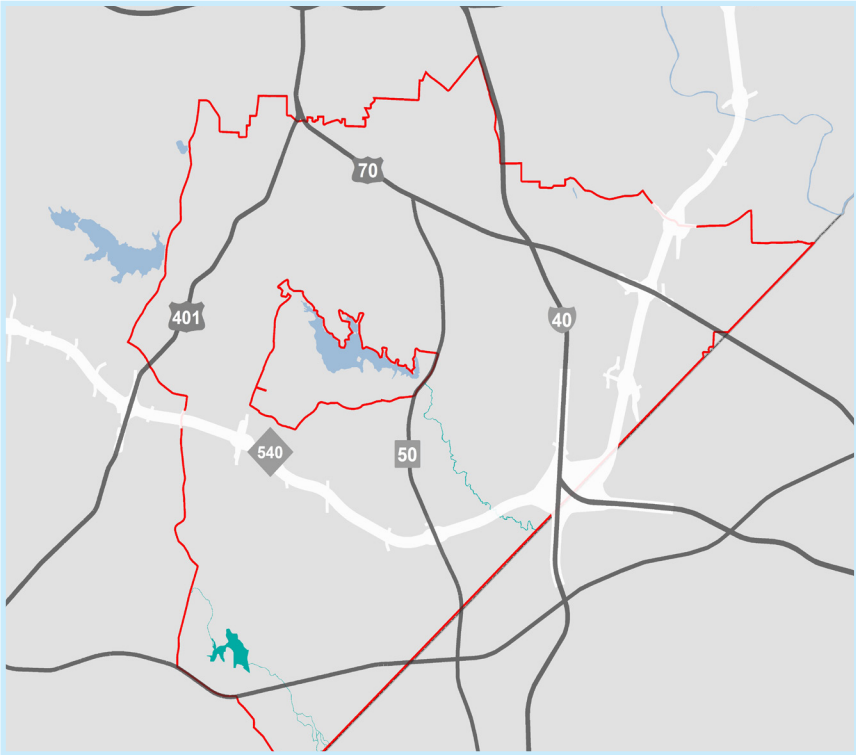
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## RURAL FOREST PRIORITY LANDSCAPES

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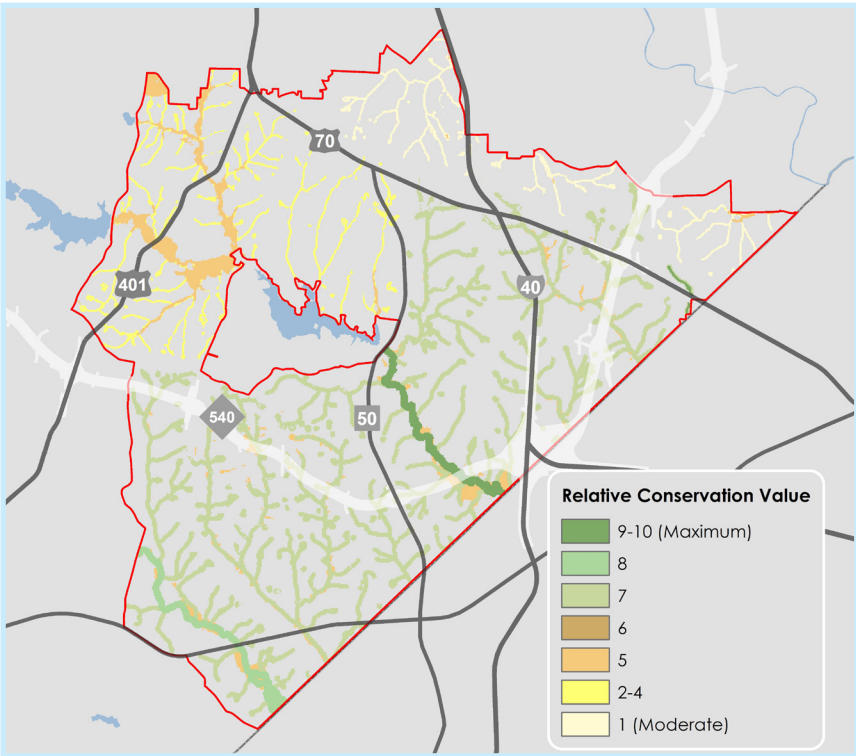
Areas where forestry is an especially significant part of the rural landscape are depicted in dark green. Forestlands in these areas provide valuable benefits, such as the protection of critical water quality resources, wildlife habitat for threatened and endangered species, and viable economic options for landowners.





**NATURAL AREAS**

Natural Heritage Program Natural Areas (NHPNA) data depicted in teal identifies terrestrial and aquatic sites that are of special biodiversity significance.



**BIODIVERSITY/WILDLIFE HABITAT ASSESSMENT**

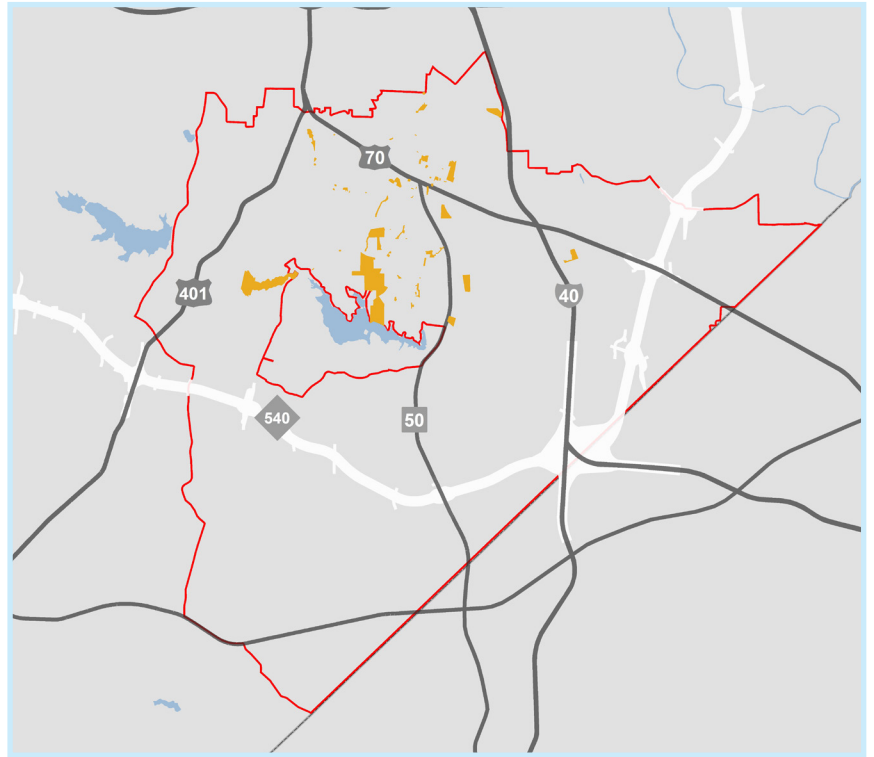
The North Carolina Heritage Program created the data set to identify, evaluate, and prioritize areas that are important to maintain healthy and sustainable ecosystems statewide. Priorities for conservation of important biodiversity and wildlife habitats are depicted using a scale of 1 (moderate conservation value) to 10 (maximum conservation value).

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## TOWN-OWNED PROPERTY

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Of the 96 properties owned by the Town of Garner, 77 are vacant, shown in gold .

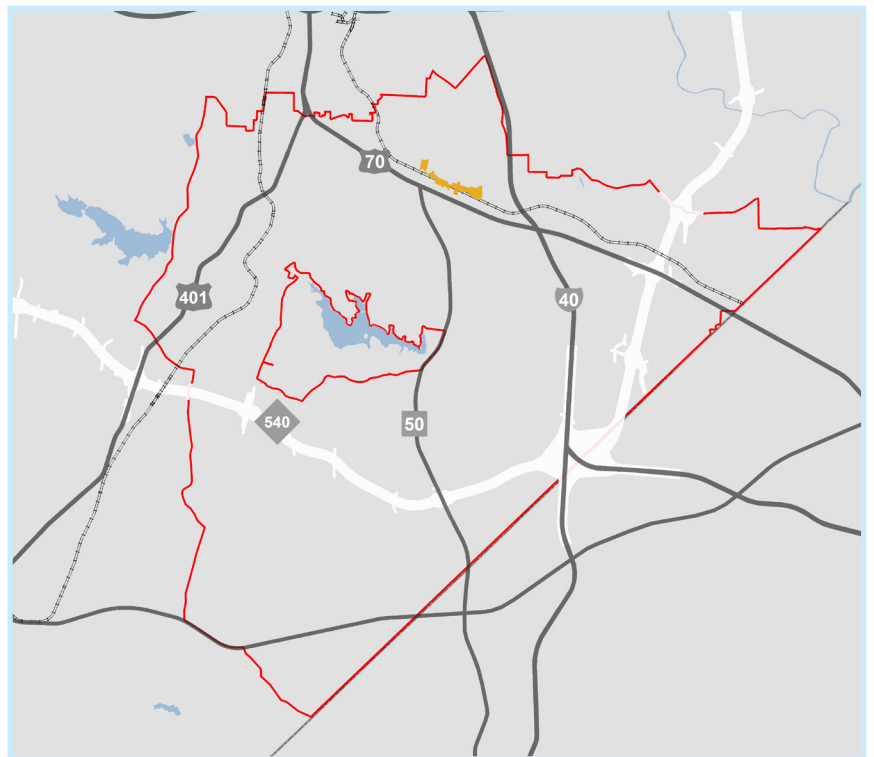


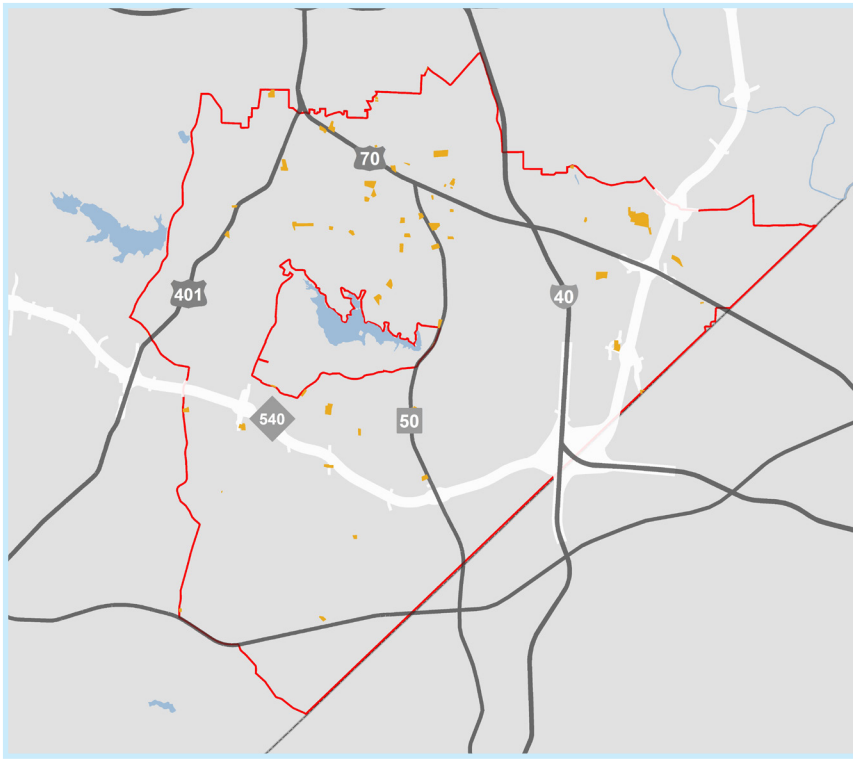
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## HISTORIC DISTRICT AND RAILROADS

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The footprint of Garner's history remains largely intact as a narrow strip of commercial building fronting the railroad tracks and Main Street. The Town's historic heart extends along the railway from Benson Road to New Rand Road, shown in gold.



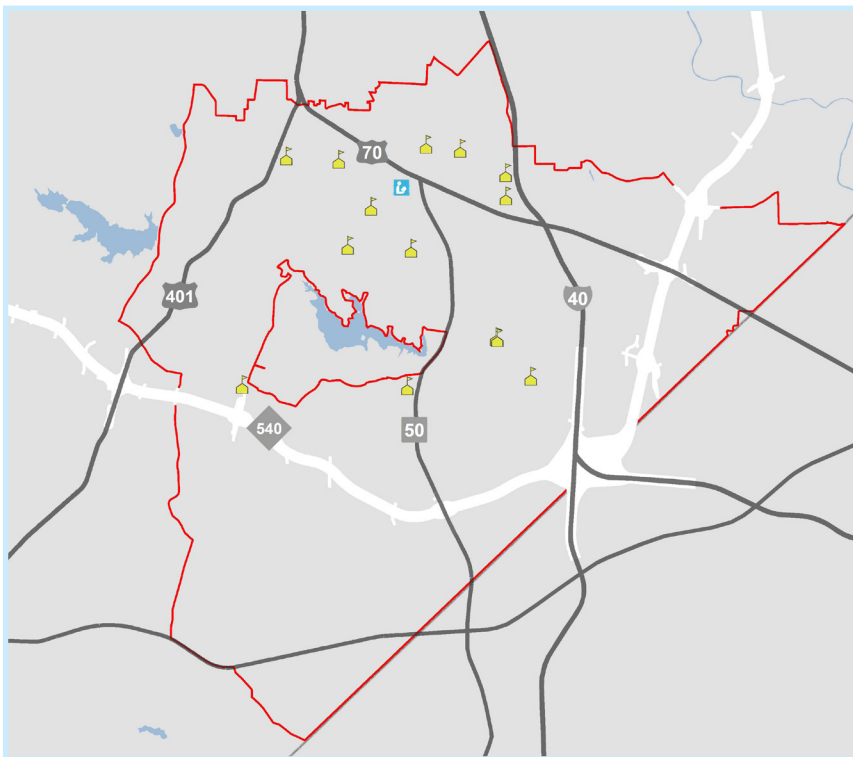



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## CHURCHES

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There are 56 churches in Garner, shown in gold. Churches and other civic organizations provide many opportunities for collaboration and cooperation in the community. This network should be included as we plan, design, implement, and maintain recommendations with Garner Forward.




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## SCHOOLS & LIBRARY

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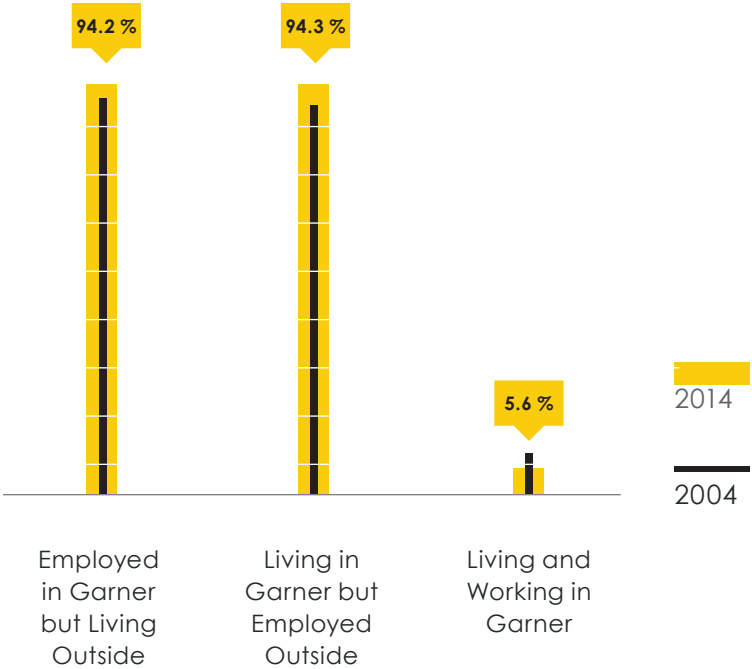
There are 14 schools (shown in gold) and 1 library (blue library logo) in Garner. These are premier walk and bike attractions in Garner.

# ECONOMICS AND THE MARKET PLACE

Part of the Garner Forward process that helped to create a preliminary, future land use map is the way that regional and national economic trends are driving our own marketplace. The following pages highlight some key findings.

Todd Noell, founder of Noell Consulting in Atlanta, discussed some of these trends and their implications for Garner during the three-day workshop in December of 2016. These are some important notes from that talk and other data sources.

- Old Suburb: Executive housing - employees follow bosses.
- New Suburb: Walkable - offices follow employees.
- In-town and inner suburbs tend to steal market share from outer suburbs
- Housing: Many "Boomers" are now "Empty Nesters," and they want more walkable lifestyles
- Housing: Renting is still down, but Garner's owners have fared well compared to national experiences
- Office: Creative Buildings/Spaces and co-work locations are increasingly popular; medical office is a rare bright spot for mid-size communities
- Retail: Shopping absorption, the rate at which retail square footage is leased, has been low in both Wake County and Garner since the Great Recession; experiential, pop-up, and fulfillment are key terms going forward
- Industrial: Regionally and locally the market is gaining strength; vacancy rates are low and the potential for new space is there




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**Live & Work** | in Garner

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**<6%**

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Only about 5.7% of people employed in the Town of Garner also live inside the Town. Having more people living and working in town make for shorter commutes and a more diverse economy.



# Market Values

Part of the plan analysis involved conducting a two-stage market analysis, along with a third stage that evaluated the land uses chosen for the future land use map as well as the opportunity sites. These pages present some of the observations of the local and national marketplace that undergird the land use planning and other assumptions used in **Garner Forward**.

Full data sets are available upon request.

## Market Analysis completed in Garner Forward

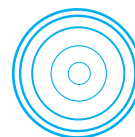
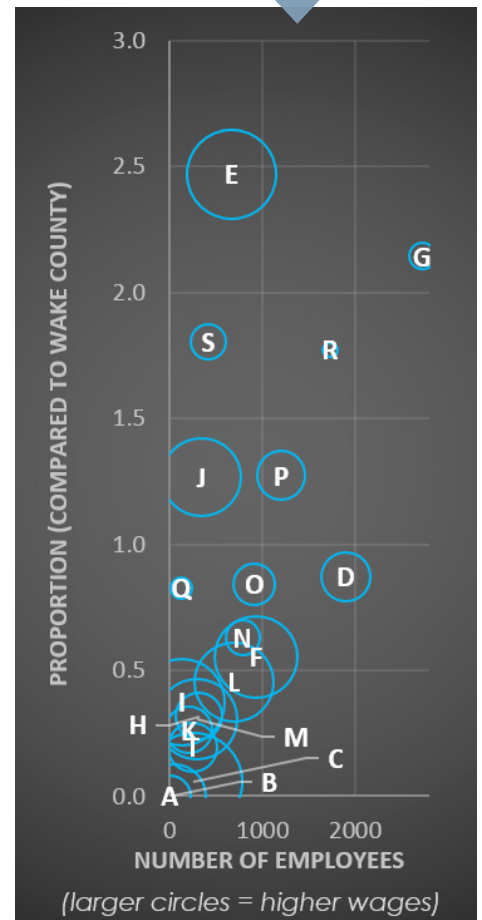
Identified market trends and demographics  
(Scott Lane / Todd Noell)

### Jobs in Garner

	<b>INDUSTRY</b>
A	Agriculture, Forestry, Fishing and Hunting
B	Mining, Quarrying, and Oil and Gas Extraction
C	Utilities
D	Construction
<b>E</b>	<b>Manufacturing</b>
F	Wholesale Trade
<b>G</b>	<b>Retail Trade</b>
H	Transportation and Warehousing
I	Information
J	Finance and Insurance
K	Real Estate and Rental and Leasing
L	Professional, Scientific, and Technical Services
M	Management of Companies and Enterprises
N	Administration & Support, Waste Mgmt., and Remediation
O	Educational Services
P	Health Care and Social Assistance
Q	Arts, Entertainment, and Recreation
R	Accommodation and Food Services
S	Other Services (excluding Public Administration)
T	Public Administration

#### How are we employed? | compared to Wake County

While manufacturing has declined in importance to Wake County, it remains important to Garner both in terms of number of jobs and (especially) wages. Retail jobs are plentiful in absolute and relative numbers (to Wake County), but pay poorly. Professional, management, and administrative jobs are more rare in Garner than in Wake County as a whole.



Circle Size = Wages



Vertical = Proportion of workers (compared to Wake County)

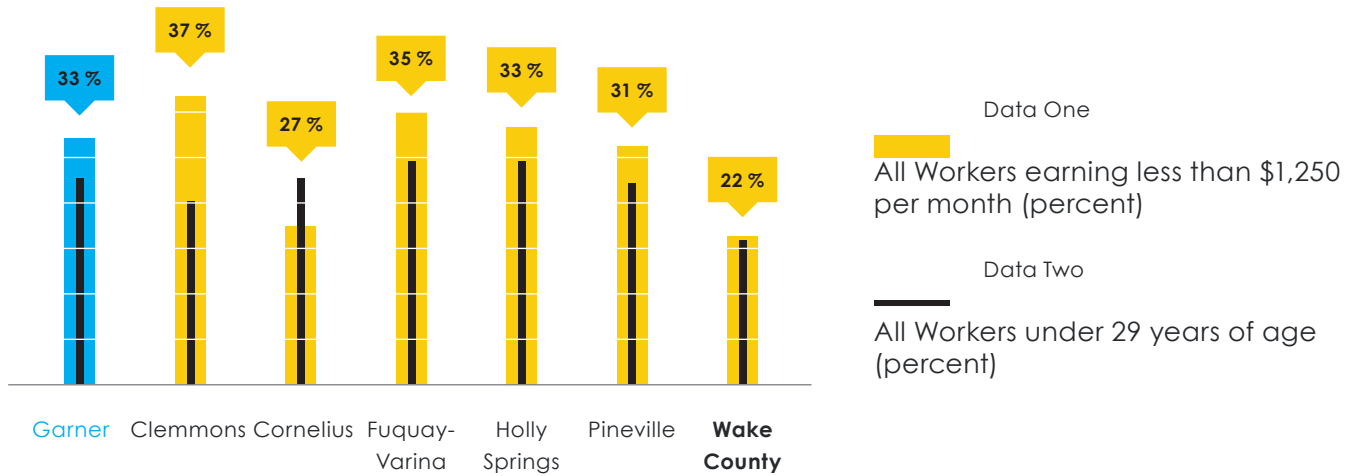


Horizontal = Number of employees

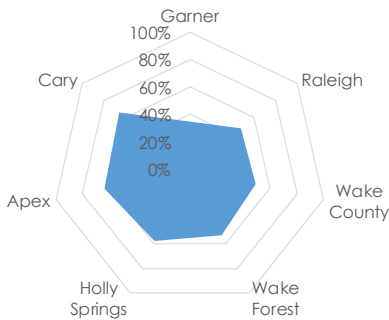
**+11%**  
2014 workers

**Garner Workers** | Earning less than \$1,250 per month (compared to Wake County)

11% more Garner workers (those people that work in Garner that may or may not be Garner residents) earn less than \$1,250 per month compared to Wake County workers



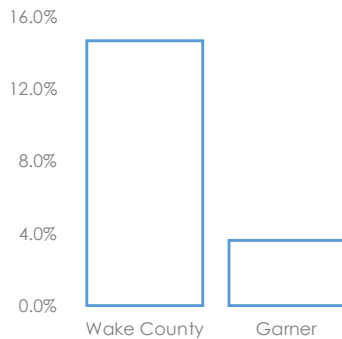
**Market Influencers**



**Higher Ed** | Bachelors Degree

**- 14.7%**

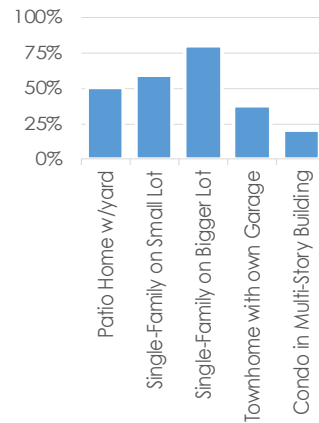
Only 35% of Garner workers have a Bachelor's Degree (or higher), fewer than other, nearby municipalities and Wake County



**Retail Space** | Vacancy Rate

**+ 11.1%**

Garner historically has lower retail vacancy rates than Wake County, and the most recent year is no exception



**Home Choice** | RTP Workers

**+80.1%**

While 80% of RTP workers like single-family homes on larger lots, the alternatives are catching up

## UTILITIES

In March 2001 the Town of Garner and City of Raleigh merged their water and sewer utility services, with the result that Raleigh finances, operates, maintains, improves and expands both systems throughout the Garner Urban Service Area. Garner-requested extensions beyond those identified in Raleigh's capital improvements program must be self-financed and Garner determines when to allow utility extensions by developers.

The merger agreement also set forth annual wastewater treatment and water supply allocations available to Garner from Raleigh with defined growth rates between 2001-2005, 2006-2015 and 2016-2025. After 2025, Garner is limited to the same growth rates as Raleigh. Therefore, extension of water and

sewer services to the current soft sites and vacant sites within the planning area should be carefully coordinated in order not to exceed the available allocation.

Garner's water/sewer allocation policy has been through multiple iterations, with the most recent revision in April 2015.

Annual non-residential allocation is limited to 10,000 gallons per day per project to prohibit disproportionate allocation to a single customer. Projects in excess of 10,000 GPD must have a tax base to total water/wastewater usage ratio of 500:1 in accordance with Garner's Economic Development Incentive Policy.

### **Sewer & Water Capacity completed in Garner Forward**

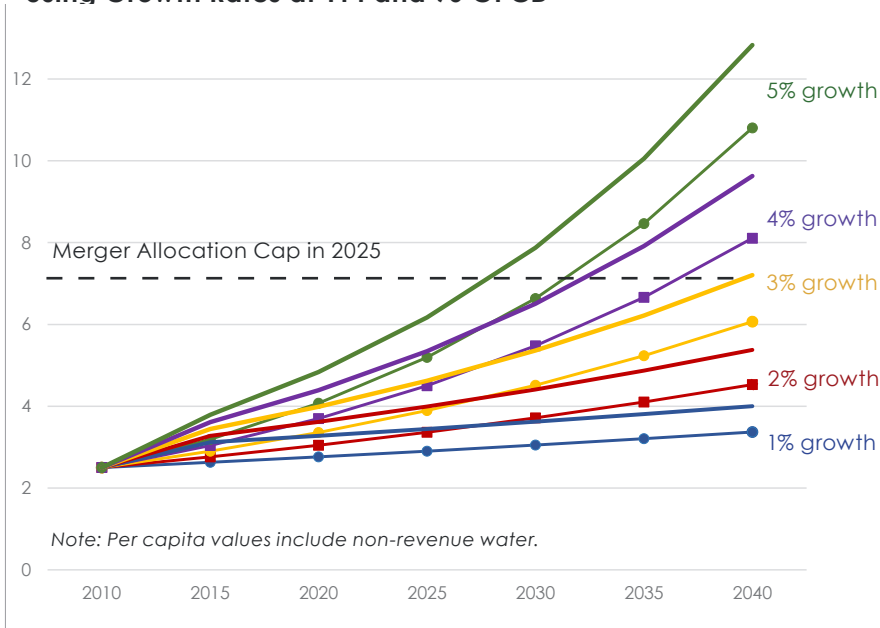
*Gary D. Hartong,  
The Wooten Company*

## Future Water and Sewer Demands

### Evaluation Methodologies

A report entitled "Analysis and Forecast of Future Water and Wastewater Capacity Needs" prepared by Hazen and Sawyer (2011) calculated that the average daily per capita water demand (GPCD) was between 96-114 gallons after examining Garner's water use records from 2004-2009. Using the 96 GPCD figure as the lower limit and 114 GPCD as the upper limit, the water and sewer projections indicate that:

### Average Day Water Demand Projections Using Growth Rates at 114 and 96 GPCD

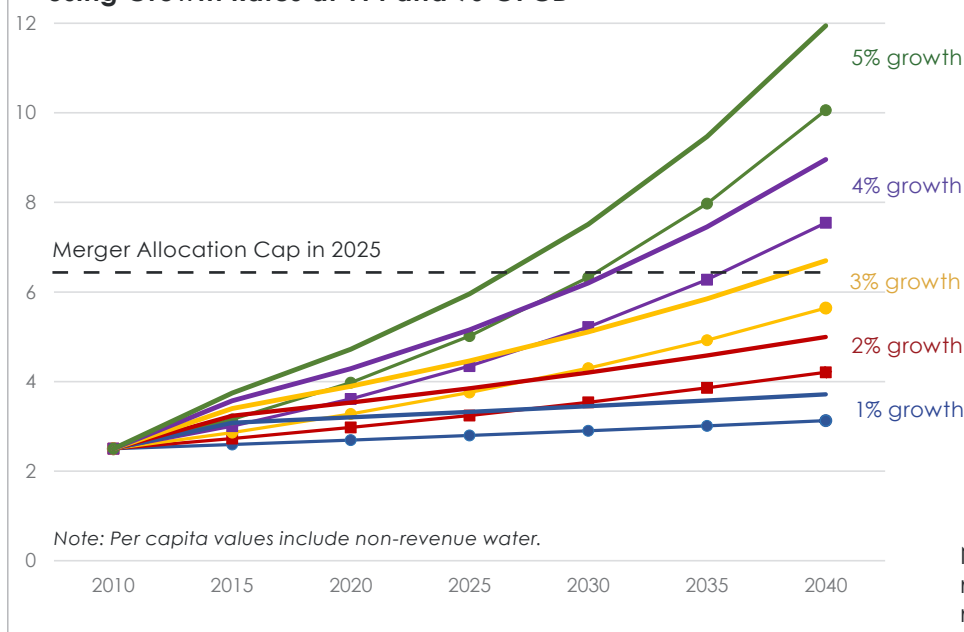


1. Garner will remain under the 2025 average day water merger allocation cap of 7.36 MGD and average day sewer merger allocation cap of 6.47 MGD through year 2040 when 1-3% annual population growth rates are applied.

2. At a 4% annual growth rate, Garner will exceed both the water and sewer merger allocation caps in 2035 using 114 GPCD and in 2040 using 96 GPCD.

3. At a 5% annual growth rate, Garner will exceed both the water and sewer merger allocation caps in 2030 using 114 GPCD and in 2033 using 96 GPCD.

### Average Day Wastewater Flow Projections Using Growth Rates at 114 and 96 GPCD

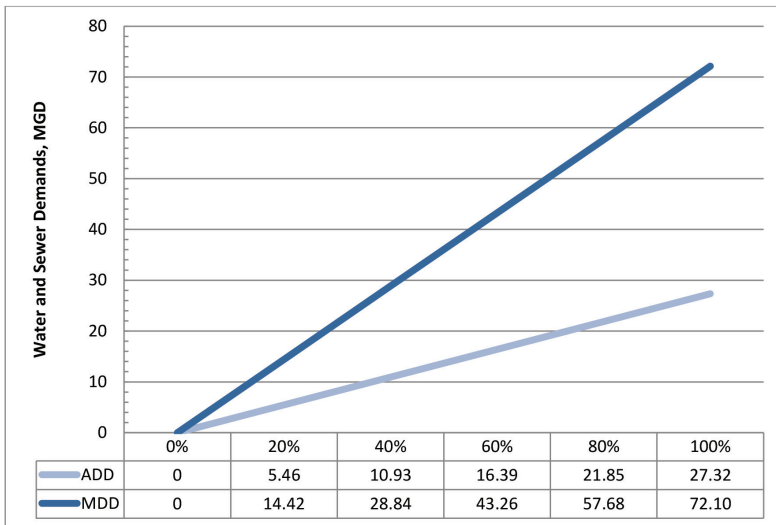


Note that the water and sewer merger allocation caps discussed do not account for Garner's allocation being limited to Raleigh's allocation after 2025 as stipulated in the merger agreement. Any allocation increase from Raleigh would delay the dates of the projected exceedances.

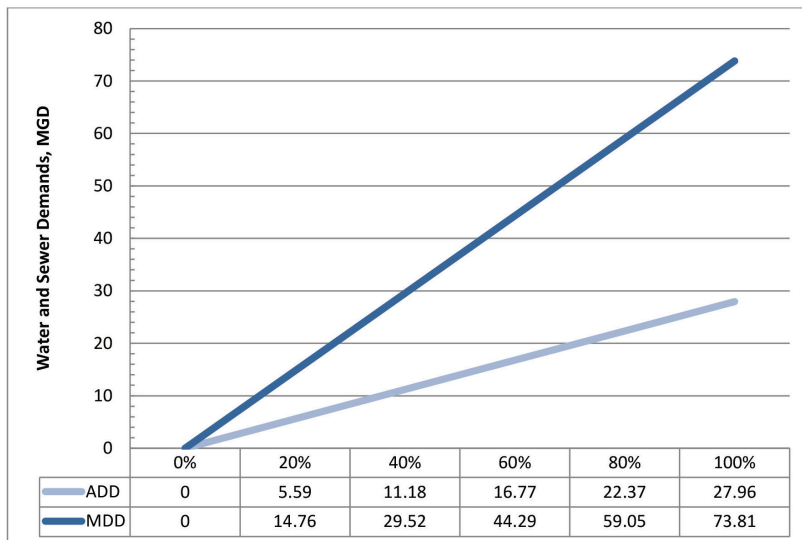
# Capacity Needs Based on Future Land Use

Future water and sewer demands are estimated by applying historical water and sewer customer consumption data (96 – 114 GPCD) against established land use/zoning categories. By assigning the estimated future water and sewer demands based on zoning classifications to the future land use categories for the 29,376 acres north of the I-540 corridor it is possible to calculate future water and sewer average daily demands (ADD) and maximum daily demands (MDD). The graph below approximates anticipated total water and sewer demands within the study area north of I-540 based on acreages and assigned flows.

**Projected Buildout Flows by Newly-Assigned Future Land Use**



**Projected Buildout Flows by Previously-Assigned Future Land Use**



While these flow projections seem aggressive when compared to the discussion and graphs on the previous page, those figures showed ADD is projected to be ~11 MGD in year 2040 at a 5% population growth. In comparison to the calculations below, 11 MGD is equivalent to 40% development of the entire study area. Therefore, full development of 29,376 acres is expected to push well beyond the 2045 planning time frame.

Both the ADD and MDD projections in the graph below also assume that 100% of the land use category will be developed. Given buffers, setbacks and other constraining environmental conditions, full development of each land use category is unlikely. Therefore, the projected ADD and MDD demands can be softened accordingly.

For comparison purposes, Garner's previously-assigned land use data was also evaluated for nearly the same study area by assigning similar equivalent persons per acre, ADD of 96 GPCD and 2.64 peak to average flow ratio. The difference of 2,163 acres is accounted for in the additional study area west of US Highway 401 extending from Raleigh to Fuquay-Varina. The results reveal that the newly-assigned land uses decrease the projected ADD/MDD by an average of 2-3% which may likely reside with the 2,163 acres differential.

**Therefore, the anticipated ADD and MDD from the newly-assigned land use categories exhibit no appreciable changes to the ADD and MDD from the previously assigned land use categories given land use reclassification.**

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