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# ANALYSIS

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# PUBLIC PROCESS

## Overview

The public engagement process for the Blue Ridge Road District Study actually began in April of 2011 with stakeholder meetings conducted by the Raleigh Urban Design Center that resulted in the agreement to procure a design team to establish a vision plan.

In order to develop a consensus vision for the Blue Ridge Road District, we followed a three-phase process that started by asking questions and gaining a better understanding of the existing conditions within the District. The second phase, where design ideas were tested and explored, took place primarily in an open workshop format, called a charrette. The design team, core stakeholders, and the general public were all invited to contribute ideas and respond to emerging ideas in an iterative way. In the final phase, the full breadth of input was distilled into the final vision plan and recommendations for moving forward.

In each of these phases, the stakeholder group as well as the broader public were invited to participate in meetings and work sessions in order to fully vet ideas and steer the vision in a consensus direction. The following page illustrates the schedule and milestones for this project.

### CORE STAKEHOLDER ADVISORY TEAM

- » Blue Ridge Reality
- » Centennial Authority
- » Highwoods Properties
- » North Carolina Department of Administration (NCDOA)
- » North Carolina Department of Transportation (NCDOT)
- » North Carolina Museum of Art (NCMA)
- » North Carolina State Fairgrounds
- » North Carolina State University (NCSU)
- » North Carolina Sustainable Communities Task Force
- » Rex UNC Health Care



*During the design charrette, the community members worked together to shape the plan for Blue Ridge Road.*

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## Schedule of Events



**2 APRIL, 2011**  
*Public Visioning Workshop*



**12 JANUARY, 2012**  
*Kick-off with Stakeholders*



**6-9 FEBRUARY, 2012**  
*Design Charrette*



**12 APRIL, 2012**  
*Design Options Presentation*

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# PUBLIC PROCESS

## Summary of Feedback

The first meetings with stakeholders and Blue Ridge Road District sought to better understand the strengths and weaknesses of the District as well as the goals for the vision plan. To this end, the design team asked participants three questions:

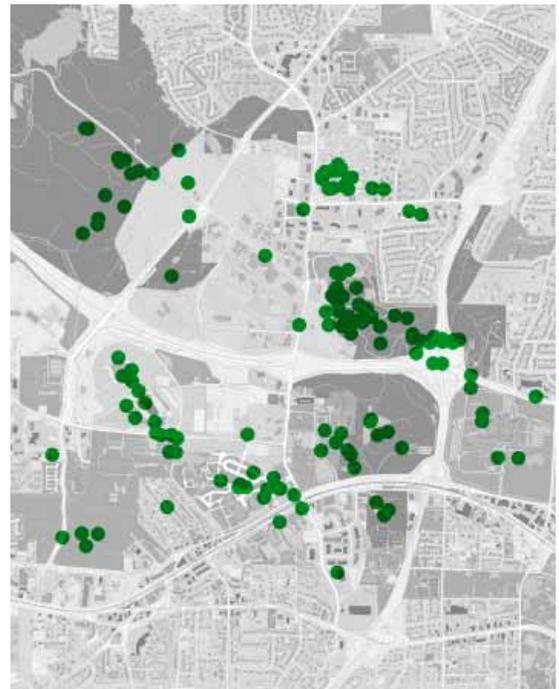
- » What are the strengths of the Blue Ridge Road District, and what draws people to the area?
- » What are the District's weaknesses or impediments to development?
- » What is your vision for the District? In 5 to 10 years, what do you see here?

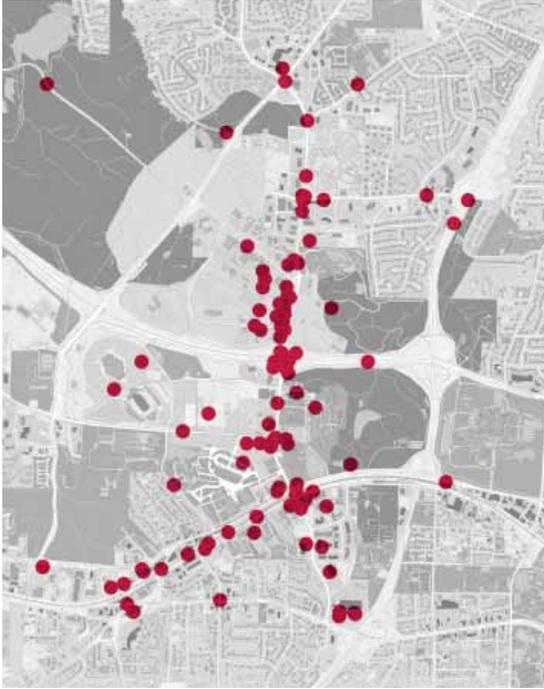
We then asked participants to mark their answers on a map of the District. In addition to their notes and ideas, people were asked to place three green dots on the three best places in the District, the red dots on the worst places, and, finally, three blue dots on the areas that needed to be most urgently fixed.

*The pattern of green dots illustrates the strengths and attractions in this District and are all dispersed around its edges.*

### STRENGTHS

- » Cluster of great destinations
- » Large employment base
- » Surrounding open space
- » Regional location and access to major thoroughfares
- » Future light rail access and stop at Hillsborough Street and Blue Ridge Road

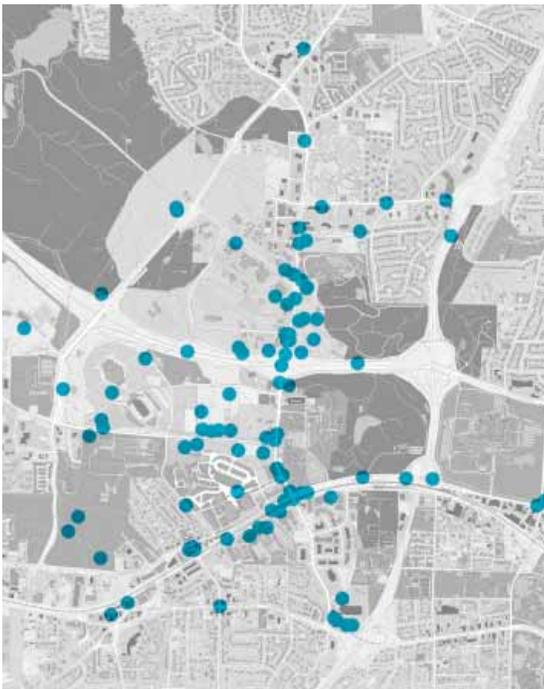




*In contrast to the pattern of green dots the weaknesses in the District are all focused along Blue Ridge Road itself. This further divides the District and blocks connectivity from east to west and from attraction to attraction.*

#### **WEAKNESSES**

- » Congestion at major intersections
- » Lack of continuous sidewalks and safe pedestrian connections
- » Lack of bike lanes
- » Lack of bus services/transit within the District
- » NCDOT Motor Fleet Management Division garage, vehicle yard, and other NCDOT facilities
- » Aesthetics
- » Lack of streetscaping or other landscape strategy



*The greatest concentrations of blue dots are focused on Blue Ridge Road between Wade Avenue and Reedy Creek Road, with the Wade Avenue interchange being a popular concern. The second concentration was along Blue Ridge Road from Trinity Road to Hillsborough Street, incorporating the Hillsborough grade separation and highlighting the need for safe sidewalks during events.*

#### **VISIONS**

- » Redevelop unattractive or underutilized sites: K-Mart® site, Motor Fleet Management Division site
- » Incorporate public art within the District
- » Potential uses: residential, mixed-use, restaurants, hotel
- » Improve pedestrian environment and intersections
- » Increase public transportation
- » Make Blue Ridge Road a destination for urban entertainment, medical care, sporting events, arts, education, and more
- » Create a “Recreational Mecca” and art corridor
- » Include mixed-income housing to serve a broad variety of new residents in the district

## Previous Plans



In order to better understand the context, we had individual organizations describe their own future plans and aspirations for their lands. What was revealed in this effort was that while there was a substantial amount of development planned over the next 20 years, the roads that serve the District were all seen as edges, rather than critical spines for access and experience within the District. As a result, it has become one of the goals of this plan to reconceive the image and character of Blue Ridge Road, while improving the pedestrian facilities along Trinity Road, Hillsborough Street, Reedy Creek Road, Lake Boone Trail, and Macon Pond Road, among others. There are conflicts among master plans. This study serves to reconcile differences that may exist. See the implementation strategy chapter for more information.

### A. Rex UNC Health Care Vision Plan:

Rex UNC Health Care is projected to spend over \$300M on expansion projects within the Corridor over the next 5 years. Facility expansions for the main campus will include a new cancer center, and patient bed tower, as well as an ambulatory surgery center and medical office building located on the 17-acre parcel at Macon Pond and Edwards Mill Roads.

### B. 2007 State Government Facilities Master Plan:

Prepared in 2007, this master plan provides a comprehensive plan for all State owned and administered properties in the Blue Ridge Road corridor. The plan addresses future growth and envisions the opportunity for a potential DHHS office complex of 850,000 square feet between District Drive and Reedy Creek Road. The plan identifies and designates Special Development Districts for select State owned properties along Blue Ridge Road.

### C. NC Museum of Art Campus Development Zones:

The North Carolina Museum of Art hopes to be a leader in future urban development of the Blue Ridge Road corridor with quality design and an appropriate mix of uses along its street-front, with an emphasis on cultural and recreational facilities connecting the Museum Park and its art program to the community. The District Framework contained herein sets the direction for the NCMA's planning to complete the Park and activate the street with a blend of urban and cultural amenities. NCMA also supports and will accommodate multiple means of access to the site, including non-vehicular transportation. The NCMA envisions further development of the Museum

Park land in support of the NCMA's mission for public art and open space. The 2007 State Government Facilities Master Plan earmarks the Park property fronting Blue Ridge Road as a Cultural Arts Center.

**D. Centennial Biomedical Campus Development:**

This 2010 master plan expands and communicates university standards and facilitates the development and design of campus buildings and facilities for the 200-acre campus. Guidelines seek to grow the campus from its current size of 600,000 gsf to 1,800,000 gsf in 2025. The plan envisions a reorientation of the campus entry and focus toward Blue Ridge Road and incorporates the pastures and woodland as a permanent visual resource.

**E. NC State Fairgrounds Master Plan:**

The 2009 Master Development Plan recommends new facilities in support of the Fairgrounds' overall mission. Significant physical improvements for pedestrian circulation during major events are a priority. Consolidation of facilities and entrances along Trinity Road along with program expansion of the Campground facilities on the western fairgrounds property are also part of the plan recommendations.

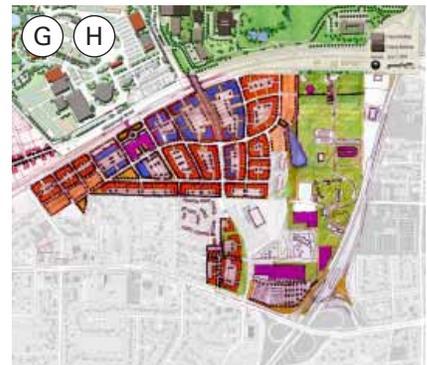
**F. NC State Fairgrounds Campground Parking Expansion**

**G. Triangle Transit/Wake County Alternatives Analysis:**

Completed in July 2011, the Alternatives Analysis recommends station locations and rail technology for a fixed guideway transit system connecting Downtown Cary through Downtown Raleigh and north to Triangle Town Center. Recommendations include a light rail station in the vicinity of the State Fairgrounds with a park-and-ride and feeder bus accommodations.

**H. Arena Small Area Plan**

A Transit Oriented Development District plan depicting conceptual development prospects for the area around the future transit station was prepared by the City of Raleigh. The Blue Ridge Road District Plan has generated a companion concept development program to assist the City of Raleigh's future effort to envision a Station Area Plan in support of zoning classifications and the City's new Unified Development Ordinance (UDO).



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# EXISTING CONDITIONS

## Introduction

The Blue Ridge Road District Study recognizes that the planning of urban districts requires the inventory and analysis of many layers of urban complexity. Key topic areas included transportation, green infrastructure, implementation, market analysis, and character. This section of the report addresses:

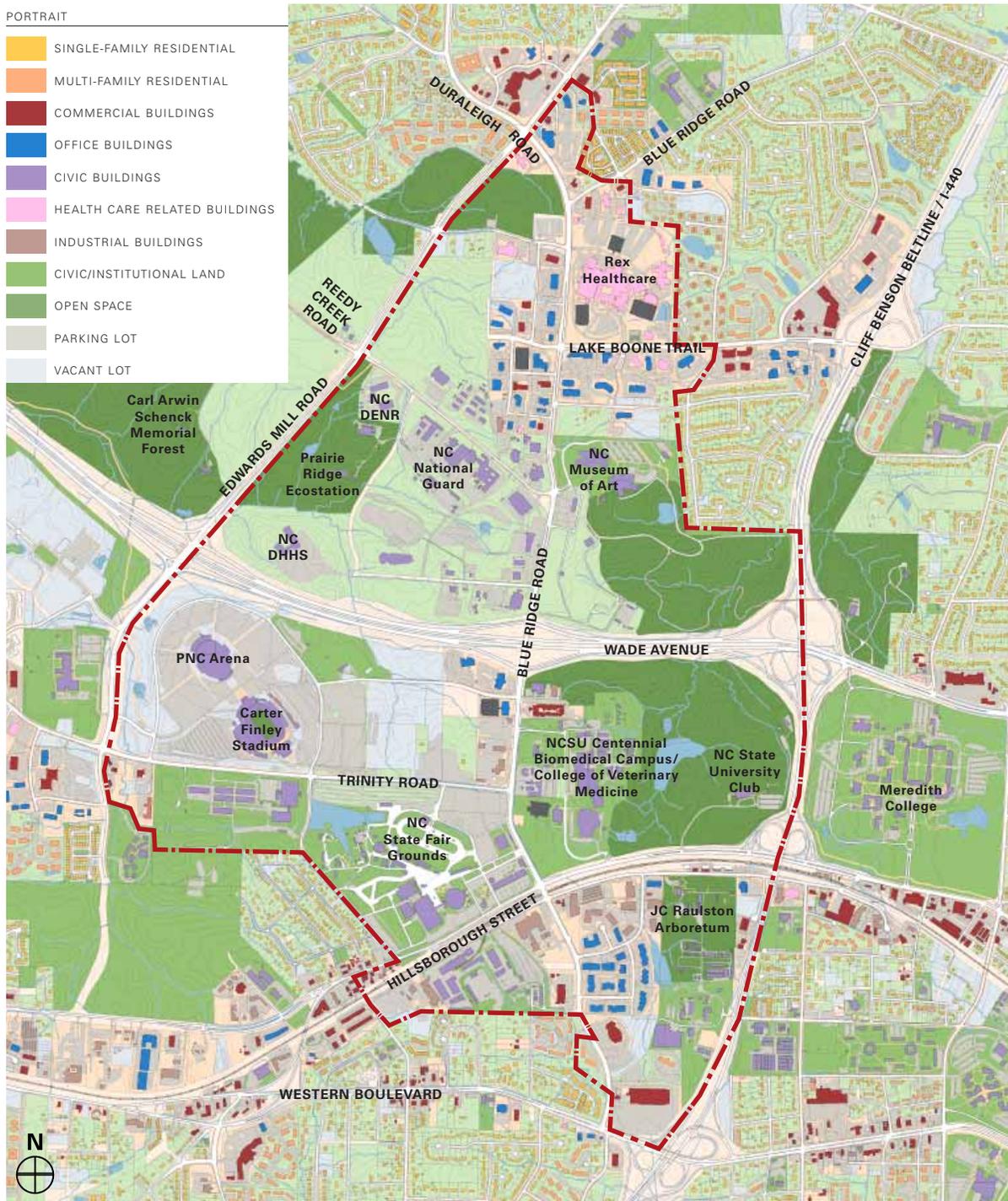
- » Assets and constraints of the District related to the key topic areas.
- » Analysis of the existing conditions of the District to better understand the context for planning;
- » Principles and opportunities for a vision moving forward.



# EXISTING CONDITIONS

## PORTRAIT

- SINGLE-FAMILY RESIDENTIAL
- MULTI-FAMILY RESIDENTIAL
- COMMERCIAL BUILDINGS
- OFFICE BUILDINGS
- CIVIC BUILDINGS
- HEALTH CARE RELATED BUILDINGS
- INDUSTRIAL BUILDINGS
- CIVIC/INSTITUTIONAL LAND
- OPEN SPACE
- PARKING LOT
- VACANT LOT



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# EXISTING CONDITIONS

## ASSETS

- » Strong regional transportation infrastructure and accessibility
- » North Carolina Department of Transportation (NCDOT) planned roadway improvements
- » Planned light rail line
- » Extensive greenway system

## CONSTRAINTS

- » Lack of local roadway connectivity and an established street grid
- » Large land holdings constrain finer street system
- » Localized heavy traffic congestion at times, including major events
- » Event parking
- » Limited north/south access by alternative modes, including pedestrian connections, bicycles, and buses
- » Unsafe intersections for pedestrians and cyclists
- » Wade Avenue Bridge has no pedestrian or bicycle facilities
- » Hillsborough Street railroad forms a barrier for all modes

## Transportation

The following pages address the current conditions of the various transportation facilities and modes serving the District. The District has a high level of regional automobile access. However, other modes of travel, such as public transit, bicycle, and pedestrian facilities are not adequate enough to provide access and circulation within the area.

### ROADWAYS

Traffic has ready access to the District from all directions, directly or indirectly via numerous major roads that include I-40, I-440, Wade Avenue, Edwards Mill Road, Glenwood Avenue, Western Boulevard, and Hillsborough Street. Blue Ridge Road, the transportation spine within the District, is a 4- to 5-lane arterial. While some of these roads can experience stop-and-go traffic during peak periods (and major events and games at the various venues within the District), they generally provide uncongested access at most times. Wade Avenue is a major expressway which connects the center of Raleigh to the District. Highway 40 offers high visibility and accommodates roughly 60,000 vehicles a day through the center of the District.

However, the large land holdings within the District have constrained the development of secondary connecting roads, essential for opening up the district for the development of mixed land uses, and pedestrian and bike accessibility and mobility. Existing roads are also wide, and travel by any mode other than the automobile is currently impractical.

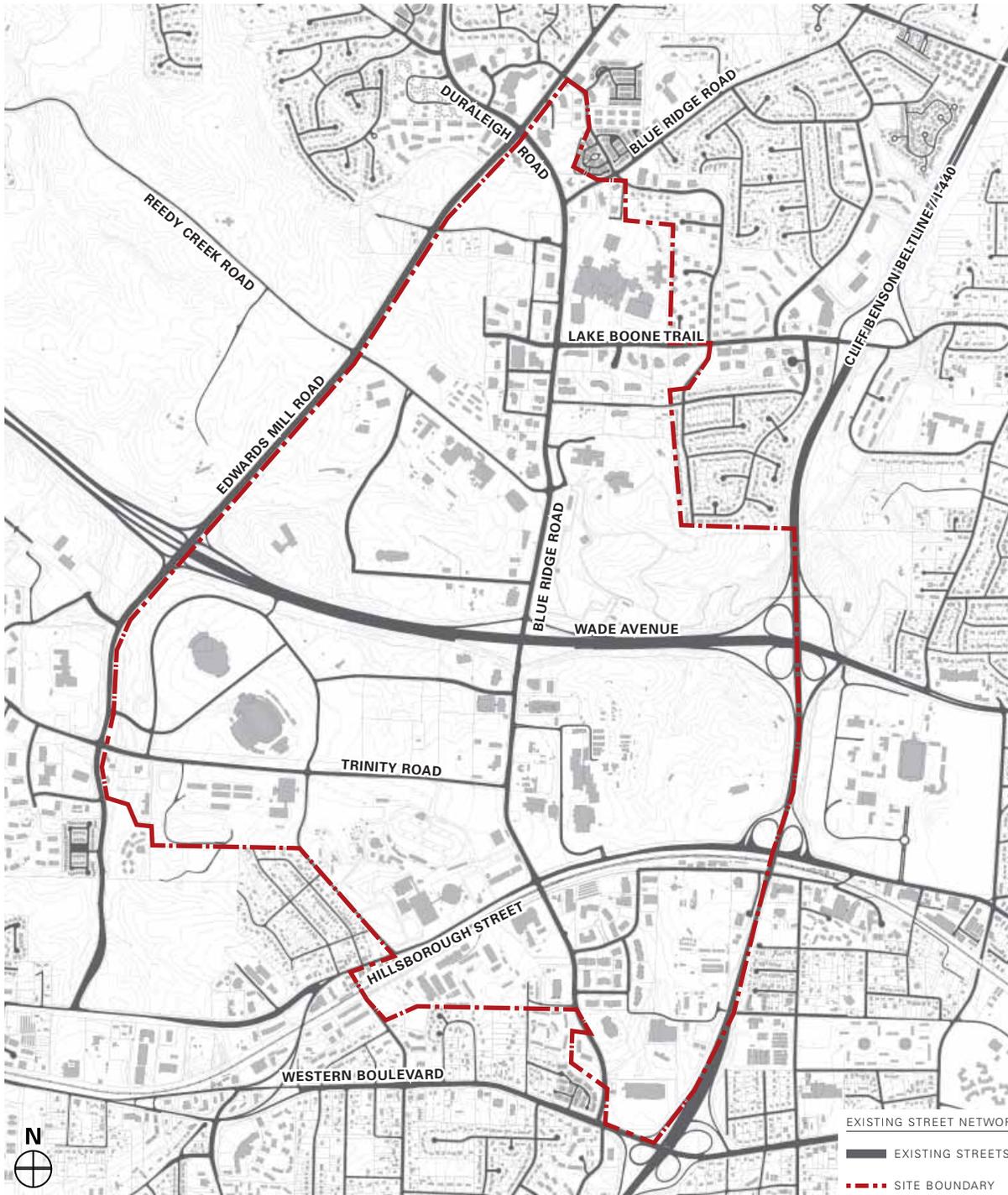
### Blue Ridge Road

The configuration and right-of-way width of Blue Ridge Road varies greatly from north to south (right-of-way ranges between approximately 90 and 110 feet). The roadway is divided into the following sections beginning from the north:

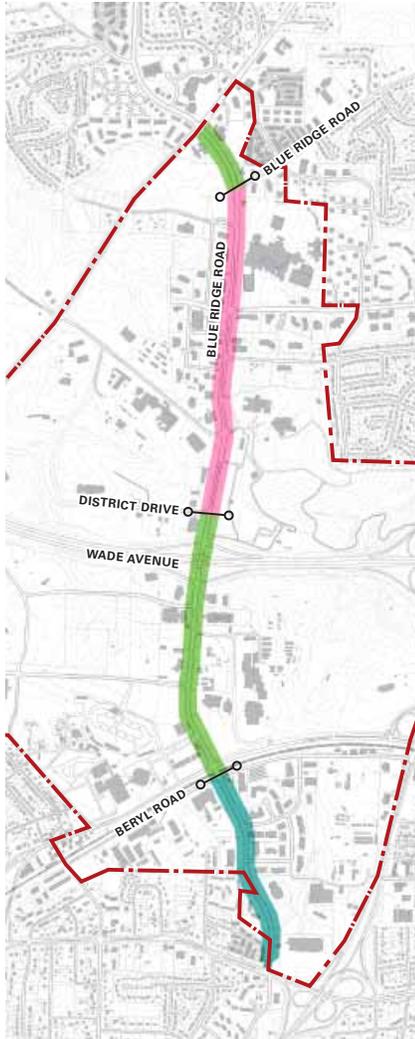
**Edwards Mill Road to the intersection of Blue Ridge Road/Duraleigh Road:** The typical cross-section is 5 lanes undivided (center turn lane), with curb and gutter, and sidewalks along both sides. The center turn lane is 14 to 16 feet wide, and travel lanes are 12 feet wide. There are additional right-turn lanes at intersections. The sidewalks are a standard 5-foot width, but there are no bicycle lane facilities.

**Blue Ridge Road/Duraleigh Road to Reedy Creek Road:** The typical cross-section changes to a 4-lane median-divided roadway, with curb

## EXISTING STREETS



# EXISTING CONDITIONS



*The above diagram indicates the existing condition of how the Blue Ridge Road street section varies.*

and gutter, and sidewalks along both sides of the roadway, with minimal sidewalk gaps. The raised concrete median is 14- to 16-foot wide, with the same 12-foot wide travel lanes. Sidewalks are 5-foot wide, and there are no bicycle facilities.

**Reedy Creek Road to Wade Avenue:** The 4-lane median divided roadway continues through this section, however sidewalks are not present.

**Wade Avenue Bridge:** The intersection of Blue Ridge Road and Wade Avenue is a conventional diamond interchange with a bridge over Wade. The bridge is approximately 70-foot wide, serving 5 lanes of traffic, and minimal shoulder widths. The bridge itself is 250 feet in length, and the distance between on/off ramp intersections is roughly 650 feet.

**Wade Avenue to Beryl Road:** The roadway continues south as a 5-lane undivided (center turn lane) facility. Curb and gutters are present in some locations near the Wade Avenue Bridge, however these also transition to ditch and swale. Sidewalks and bicycle lanes are not present in this section.

**Beryl Road to Western Boulevard:** Blue Ridge Road south of the railroad tracks and Beryl Road is again a 5-lane undivided (center turn lane) facility, however bicycle lanes have recently been painted by the City of Raleigh. These were accommodated by narrowing the travel lanes and center turn lane to 11-foot wide. Sidewalks exist along this section with few gaps.

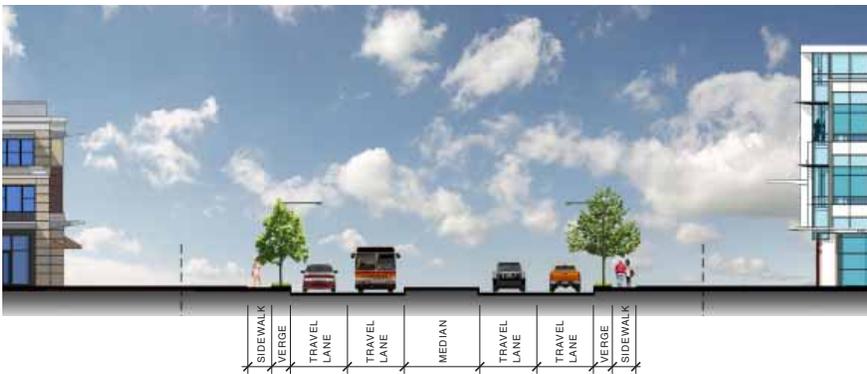
## PEDESTRIANS AND CYCLISTS

Overall, the pedestrian environment within the District is very poor. Sidewalks are severely lacking in most of the District, with the exception of the Rex Health Care area where connectivity is good. Blue Ridge Road south of the NCMA has very limited sidewalks, with none between the NCMA and Hillsborough Street.

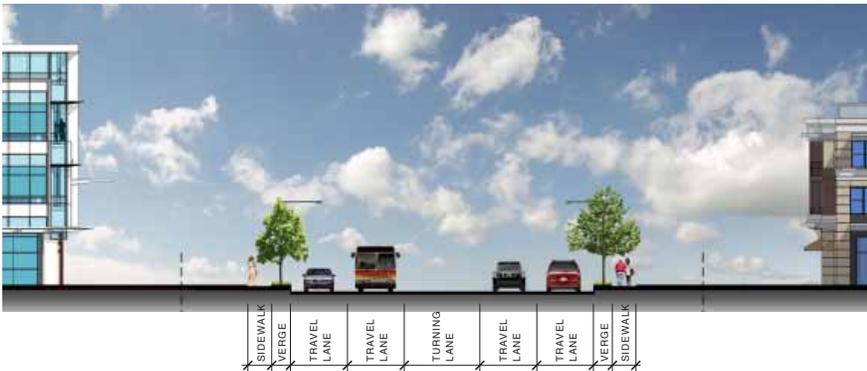
Blue Ridge Road north of the railroad tracks is unsafe for cyclists. While only Edwards Mill Road has provisions for cyclists for the entire north/south length through the District (Blue Ridge Road has bike lanes south of the railroad only), the District is traversed by the very popular Reedy Creek Trail which passes through the NCMA grounds and extends beyond the Beltline to the east and Umstead Park to the west. The House Creek Trail currently under construction will eventually provide a connection to the extensive Crabtree Creek Trail and other trails in North Raleigh, greatly

## BLUE RIDGE ROAD EXISTING CROSS SECTIONS

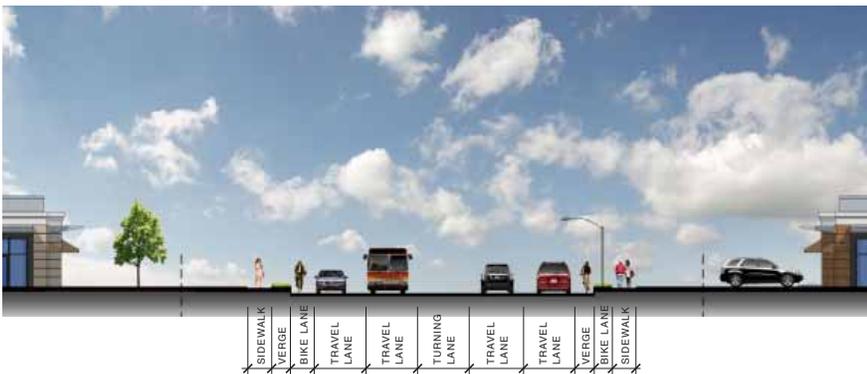
SECTION	# OF LANES	MEDIAN	BICYCLE LANES	PARKING
	4	Vegetative Median	No	No
	5	Center Turn Lane	No	No
	5	Center Turn Lane	Yes	No



*Blue Ridge Road Section  
north of District Drive*



*Blue Ridge Road Section  
from District Drive to Beryl Road*



*Blue Ridge Road Section  
south of Beryl Road*

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# EXISTING CONDITIONS

enhancing bike accessibility to the study area. The greenway plan for the District offers the opportunity to enhance the existing greenway system so that cycling and walking can become significant modes of travel.

Currently, specific safety and access problems areas are the Hillsborough Street/Blue Ridge Road intersections with Hillsborough Street; Reedy Creek Road and Edwards Mill Road; and the Wade Avenue overpass. A comprehensive pedestrian and bike system will need to be incorporated into any recommendations.

## EXISTING TRANSIT

- » City of Raleigh CAT System: centered on the Downtown
- » Triangle Transit: Regional service
- » NCSU Wolfline: Connections for the campus to the southern end of the Corridor
- » Cary C-Tran: Connection between Cary and southern end of the Corridor

## TRANSIT

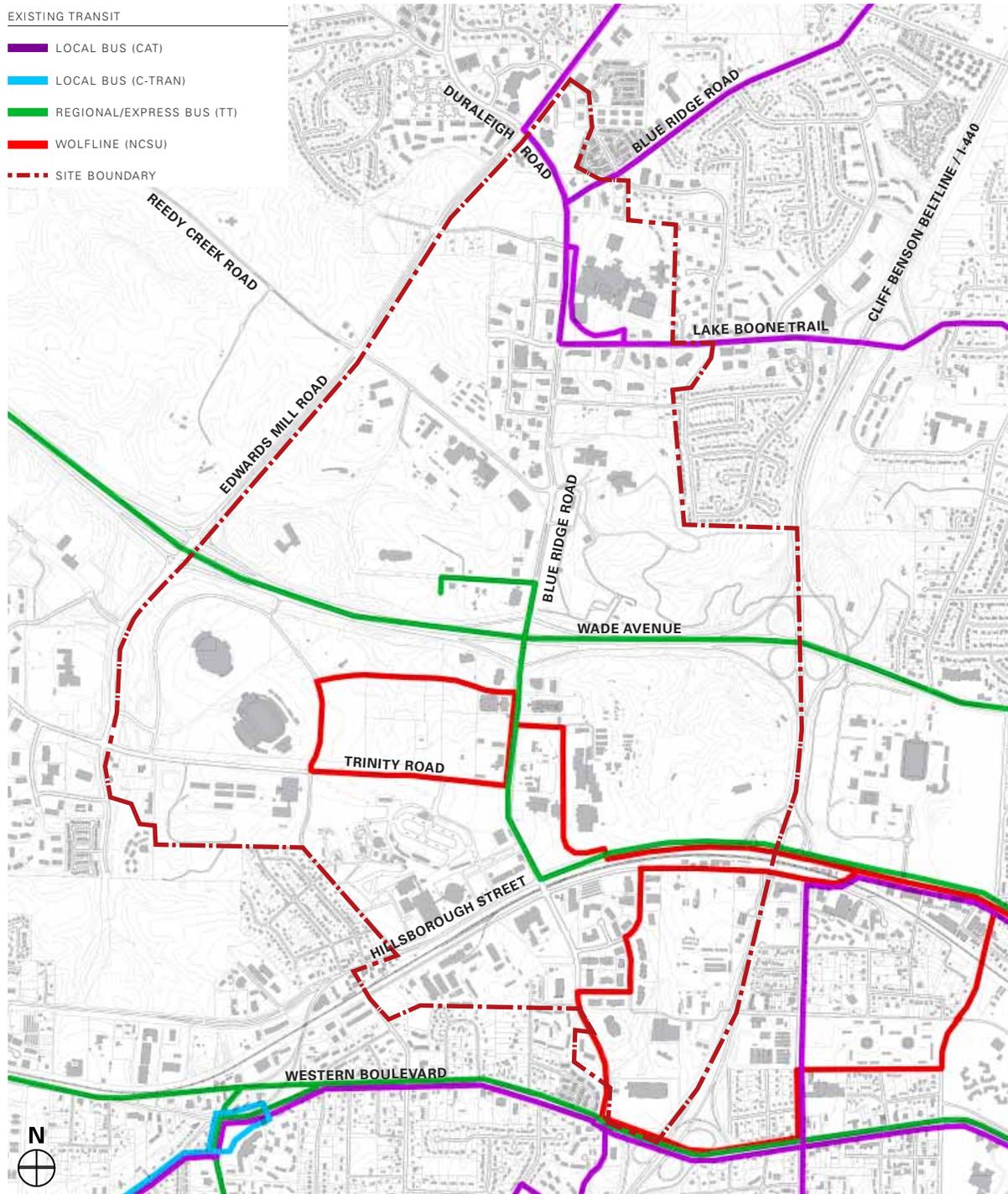
Transit services within the District generally operate in an east/west direction across the area, with no service along the full length of the District in the north/south direction. The current services cater primarily to travelers coming to the area (e.g., Rex Health Care employees). Most routes generally run every 30 minutes. Specific services, shown on the right, include:

- » The City of Raleigh CAT system, mainly a hub and spoke route structure centered on the Downtown, serves Rex Health Care and surrounding developments at the north end of the corridor (and connecting to a transfer station at Crabtree Valley Mall), with routes extending as far south as Lake Boone Trail. Three routes run along a portion of Western Boulevard at the south end of the corridor.
- » Triangle Transit provides regional service through the District between Downtown Raleigh, Downtown Cary, Downtown Apex, and locations to the west of the Triangle. Designed to serve daily (regional) commuters, these routes use Wade Avenue, Hillsborough Street, and Western Boulevard. A heavily utilized Triangle Transit park-and-ride is located on District Drive that primarily serves two express routes (Durham and Chapel Hill).
- » Two NCSU Wolfline routes serve the southern section of the corridor, connecting to the main campus approximately two miles to the east. One route, running every 15 minutes, serves main campus park-and-ride located adjacent to the Carter-Finley Stadium, and the Centennial Biomedical Campus. The second route loops through an area south of the railroad tracks, providing service to a second park-and-ride (every 30 minutes), student apartment housing, in addition to other venues. All Wolfline routes are fare-free and open the public, not just NCSU students.
- » The Town of Cary operates a C-Tran route that stops approximately 0.5 miles short of the southern end of the corridor, but does provide for transfers to CAT or Triangle Transit routes at this location.

## EXISTING TRANSIT

### EXISTING TRANSIT

- LOCAL BUS (CAT)
- LOCAL BUS (C-TRAN)
- REGIONAL/EXPRESS BUS (TT)
- WOLFLINE (NCSU)
- SITE BOUNDARY



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# EXISTING CONDITIONS

## ASSETS

- » Access to William B. Umstead State Park and Carl Alwin Memorial Schenck Forest
- » Extensive greenway trail system that is being expanded as part of the Capital Area Greenway Plan (note: some trails are pedestrian only)

## CONSTRAINTS

- » Incremental use of large spans of open space without a comprehensive open space plan
- » Lack of strong north/south pedestrian bike facilities
- » Lack of sidewalks and pathways to link greenway trails

## Green Infrastructure

A dominant feature in the study area is the presence of several important open space systems. The area benefits greatly from the access to open space and also the visual character it provides for the District. Still, opportunities remain to connect these spaces with additional pedestrian and multi-use trails and sidewalks. Elements of the existing network include:

### GREEN INFRASTRUCTURE SYSTEM

The study area offers the greatest concentration of public/private open space assets in Raleigh including Carl Alwin Memorial Schenck Forest, William B. Umstead State Park, Museum Park at the NC Museum of Art, JC Raulston Arboretum, and the College of Veterinary Medicine pastures. However, the District lacks the secondary linkages necessary to connect to the major open space assets, the major destinations, and surrounding neighborhoods.

Strengthening the public realm along the Blue Ridge Road corridor would help link these regionally-significant public gathering spaces and help strengthen them individually, creating a cohesive district.

The other occasional open spaces include the parking lot at the Fairgrounds that is used for the Saturday flea market, as well as the parking lots at the PNC Arena and Carter-Finley Stadium which are heavily used for pre-game and pre-event tailgating. There are also many fields and secondary open spaces in the study area. Some of these, such as the grazing fields on NCSU's property, contribute to the semi-rural character of the area.

### PEDESTRIANS AND CYCLISTS

Safe and efficient pedestrian and bike facilities are severely limited and constrain effective use of the corridor by anything other than automobiles. A goal should be to establish pedestrian and bike interconnectivity between large open space systems and the District's major destinations.



# EXISTING CONDITIONS

## ASSETS

- » Strong economic drivers
- » Major public institutions and venues

## CONSTRAINTS

- » Lack of identity
- » Little connection to adjacent neighborhoods
- » Oversized blocks with few secondary connections
- » Buildings are not oriented towards the street
- » Scattered and underutilized existing land uses on State and public properties

## Existing Character

The character of the Blue Ridge Road District is mostly suburban with low-rise buildings set back from the property lines. The buildings on the southern portion of the Blue Ridge Road from Western Boulevard to Hillsborough Street are pulled relatively close to the street but are still separated from the sidewalk by parking fields. In the Fairgrounds area, there are mature stands of trees. From Hillsborough Street to Wade Avenue, there is little edge definition. The northern area from Wade Avenue to Rex Hospital include street trees, sidewalks, landscaping which give some spatial definition, but it lacks the feel of a complete urban realm.

There are several notable employers and significant destinations in the District, but each of them represent an individual institution, therefore the District lacks a common unified identity. Due to the large parcel size and predominance of State and institution-owned land, there are few residential communities. There is generally little or no vehicular or pedestrian connection to and from the surrounding neighborhoods.



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## HISTORICAL ANALYSIS SUMMARY

The Blue Ridge Road District study area includes a few historically significant places, such as:

- » Dorton Arena, 1950 – National Register of Historic Places, 1970.
- » NC State Fair Commercial and Educational Buildings (including Flea Market buildings) – National Register, 1987.
- » Small family graveyard at corner of Blue Ridge Road and Reedy Creek Road, located on in the northwest corner of the intersection, including several mature cedar trees.
- » William B. Umstead State Park is listed in the National Register of Historic Places and is part of the NC State and Histori Nature Reserve

Additionally, there are several potentially historic resources in the vicinity of the Blue Ridge Road, including:

- » The auditorium at Meredith College.
- » Greek Revival period plantation house behind Hillsborough Street across from Meredith Campus.
- » Royal Bakery on Hillsborough Street, listed on National Register and Raleigh Historic Landmark.



*Meredith College Entrance from Hillsborough Street*

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# EXISTING CONDITIONS

## ASSETS

- » Strong partnerships
- » New Unified Development Ordinance and City's support
- » Blue Ridge Road Corridor partnership

## CONSTRAINTS

- » Independent and incremental master plans of State and institutional properties
- » Bureaucratic hurdles for redevelopment

## Implementation Issues

In order to encourage development in the District, one must also address implementation issues related to development. Currently there are a few factors that serve as a challenge to meeting the vision for a 24-hour, mixed-use, pedestrian-friendly district. Existing factors that can help overcome these challenges include:

### STRONG PARTNERSHIPS

The District is fortunate to encompass the finest sports, cultural, and entertainment destinations in the State, each with its own master plan and singular initiatives for the future. A collaborative partnership between these entities will need to be sustained to secure a common vision for the District, which will in turn, inform the City's support through the 2030 Comprehensive Plan and the Unified Development Ordinance (UDO).

### NEW UNIFIED DEVELOPMENT ORDINANCE AND CITY'S SUPPORT

The study should orient recommendations for future vision of the District to inform the City's 2030 Comprehensive Plan and the Unified Development Ordinance (UDO). The City is generally supportive of the necessary actions required to realize the Blue Ridge Road Corridor District Study Vision.

**BLUE RIDGE ROAD CORRIDOR PARTNERSHIP IS ESTABLISHED**  
Maintain and grow the current support and involvement of key Blue Ridge Road Corridor stakeholders. Create an operational framework for long-term partnership between the stakeholders and with the City.

**HEALTH IMPACT ASSESSMENT UNDERWAY IN THE DISTRICT**  
The University of North Carolina and the NCMA have initiated a Health Impact Assessment (HIA) funded by the Blue Cross/Blue Shield Foundation of North Carolina. The HIA covers the entire Blue Ridge Road Corridor area, but focuses on quantifying health benefits of improving pedestrian connectivity from various activity centers to the NCMA. Collaboration on this effort will bring insights into urban design issues and valuable post-occupancy data to quantify the effectiveness of corridor improvements.

### MASTER PLANS FOR MAJOR DESTINATIONS

Link and integrate current land uses and future master plans prepared by institutional and State entities as well as private development master plans.

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## Market Issues

### STRONG ECONOMIC DRIVERS

The District enjoys strong economic drivers already in place. The presence of large institutional land holdings in the corridor have constrained the opportunities for strong mix of uses necessary for a fully functioning mixed-use district. Creative strategies are needed to provide opportunities to increase retail, residential, office, restaurant, and office uses in a concentrated mixed-use development.

### LACK OF URBAN SERVICES

The study area lacks the breadth and depth of urban services needed to support a high performing mixed-use district with the restaurants, retail, and hotels needed to engage and retain visitors, employees, and residents.

### LIMITED RESIDENTIAL OPPORTUNITIES

Residential opportunities are now limited, particularly affordable housing near the economic job generators. There is a need to promote a mix of housing opportunities to attract and sustain a new mix of services-oriented land uses.

### ASSETS

» Strong economic drivers

### CONSTRAINTS

» Lack of urban services

» Limited residential opportunities

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# EXISTING CONDITIONS

## Market Analysis

### CONSTRAINTS

The greatest constraint for the Blue Ridge Road District has been the limited availability of land. The area benefits from excellent access to major thoroughfares, an in-town location with proximity to a significant base of employees, strong traffic counts, and multiple regional points of destination (i.e. Rex UNC Health Care, PNC Arena, NCMA, and the State Fairgrounds). Market forces would have dictated private development on the land in this area; however, it has largely been unavailable for development. Of the private development that has occurred, it is most heavily concentrated in office space. Much of that space is related to health services and benefits from proximity to Rex UNC Health Care. A summary of the current allocation of uses is shown in Table 1. It should be noted that hospital space, civic, and government uses are not included in these numbers.

### OPPORTUNITY

An assessment of the Blue Ridge Road District suggests the opportunity for additional development across virtually all land use categories, with varying degrees of demand in the short-, mid-, and long-term. A summary of the opportunity by land and hierarchy of current residual value is shown in Table 2.

An explanation and summary of opportunity for each land use follows:

### MIXED-USE

This category spans multiple land uses including residential (both rental and for-sale), office, retail, and potentially civic uses. A mixed-use development is one where there is a combination of land uses that allow people to live, work, shop, and eat within one development. National examples have shown that mixed-use developments have the potential to act as catalysts and be transformative in redefining and branding an area, such as the Blue Ridge Road District. In addition, RCLCO research has shown that retail, office, hotel, and residential uses within a mixed-use development benefit from the diversity of product, typified by enhanced absorption, and achievable rates. From a residential perspective, housing within mixed-use infill developments tends to attract young, professional singles and couples as well as empty nesters and retirees. Office users seeking mixed-use developments can include small, professional serving users; however, larger corporate users can also be attracted depending on the scale, location, and execution of the

**TABLE 1: ALLOCATION OF CURRENT USES IN THE BLUE RIDGE ROAD DISTRICT \***

USE	SQUARE FEET / UNITS
Total Retail Square Feet	241,841
Total Office Square Feet	2,971,407
Total Hotel Rooms	205
Total Industrial Square Feet	349,107
Total Housing Units	310
<i>Apartment Units</i>	<i>48</i>
<i>Single-Family and Condo Units</i>	<i>262</i>

\* Based on 2011 information provided by the Raleigh Urban Design Center (note: hospital space, civic and government uses are not included in these numbers)

**TABLE 2: SUMMARY OF MARKET OPPORTUNITY BY LAND USE**

	CURRENT RESIDUAL LAND VALUE			MARKET DEMAND IN STUDY AREA		
	HIGH \$\$\$	MID \$\$	LOW \$	SHORT TERM (0 TO 2 YRS)	MID TERM (2 TO 5 YRS)	LONG TERM (5+ YRS)
MIXED-USE	√			XXX	XXXX	XXXX
HOTEL	√			XXXX	XXXX	XXXX
RETAIL	√			XXXX	XXXX	XXXX
APARTMENTS	√			XXXX	XXX	XXXX
MEDICAL OFFICE	√			XXX	XXXX	XXXX
OFFICE (INITIALLY SURFACE PARKED)	√			XX	XXX	XXXX
TOWNHOUSE		√		XXXX	XXXX	XXXX
SINGLE-FAMILY (7+/ACRE)		√		XXXX	XXXX	XXXX
INDUSTRIAL		√		XXX	XX	X
CONDOS			√	X	XX	XXXX

KEY	
<b>x</b>	represents likeliness of occurrence at this stage
X	NOT LIKELY
XX	SOMEWHAT LIKELY
XXX	LIKELY
XXXX	MOST LIKELY

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## EXISTING CONDITIONS

project. Conversations with multiple brokers in the Raleigh market have indicated an overwhelming preference for mixed-use environments from employers moving to the area, however, there are limited options in the market to choose from. Retailers that fare well in mixed-use environments span a spectrum and range from small inline retail tenants to large, big-box tenants.

### HOTEL

In Wake County, the relationship of hotel rooms to employees is 28 employees per hotel room. In the City of Raleigh, this number drops slightly to 25 employees per hotel room. In strong tourist destinations such as Orlando, this number can drop even more significantly to 7 employees per hotel room. Due to both the strong employment base and regional tourist destinations within the study area, a lower employee per hotel room ratio is justifiable. Conservatively, using the City of Raleigh's employee to hotel room ratio of 25 employees/room, 524 hotel rooms are supportable in the area. Using a more aggressive metric of 15 employees per room to account for the regional uses results in over 800 supportable rooms. If we account for the existing supply of rooms in the District at the Ramada, the remaining supportable room count is conservatively 320 rooms and aggressively 600. It should be noted, that the addition of hotels along the edge of the District could impact the stated demand opportunity. Average daily rates of hotels in the study area could range from \$120 per night for limited service to \$185 per night for an upscale, full-service hotel.

### RETAIL

Currently, the area is underserved for certain retail categories including specialty food stores, clothing and shoe stores, home furnishings, general merchandise stores (such as Target), restaurants, sporting goods, book, and hobby stores. Retail rates could range from \$25 per square foot for space in an anchored, free-standing center, to \$35 per square foot in a lifestyle and/or mixed-use development. These rates are largely based on rates being achieved in Cameron Village and the surrounding area.

Future retail opportunity will be site specific (i.e. access, visibility and adjoining uses), however, the District overall has strong fundamentals. Strong drive-by traffic, destination uses, employment, an established base of surrounding households, and proximity to students and faculty at NC

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State are all supportive of future potential. At present, the ratio of retail per household in Wake County is 65 square feet per household. This number includes all retail from local serving convenience stores to department stores and can be used as a metric to determine additional supportable retail as more households are added to the area. Mid- and long-term retail opportunity in the study area is heavily tied to the addition of households in the area as well as commercial users. Simply put, future retail opportunity will be dependent on the land availability and other uses developed. It should also be noted, due to the long-range view of the District, the applied ratio is meant to provide a guideline of the overall retail opportunity, however, there is certainly the potential for retail to be absorbed at a faster rate than 65 square feet per household based on additional households added outside the area, anchor retailers attracted, and employees added.

#### RESIDENTIAL

Relative to the number of jobs in the area, the Blue Ridge Road District is particularly undersupplied in housing. Nationally, there are 1.15 jobs per household (jobs to household ratio). The ratio in the Raleigh MSA is relatively similar at 1.09 jobs per household. However, in the Blue Ridge Road-District, there are 11.09 jobs per household, suggesting a significant imbalance between employment and housing. Over 10,000 additional households would need to be added for the jobs to household ratio to be more reflective of the MSA and the nation. Demand opportunity suggests the potential to absorb over 250 rental units and over 400 for-sale units, annually. While it may not be realistic to add that many additional households due to land availability and competitive opportunities for other uses, it underscores the need for additional housing in the area.

Based on current land values, apartment, townhomes, and dense single-family housing (7 units per acre or greater) are the most financially viable housing products from a development perspective. As the housing market continues to recover, we also anticipate demand opportunity for condo units. Currently, the cost to construct this type of housing and the achievable rates make this a less viable opportunity than the aforementioned housing products.

Demonstrated sales and leasing suggest the supportable market rate for apartments is \$1.35 per square foot to \$1.60 per square foot, depending on

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## EXISTING CONDITIONS

configuration and orientation. For instance, apartments built adjoining or adjacent to retail would command the highest rents; however, new, garden-style apartments without a retail orientation would command \$1.35 per square foot. In the short-term there may be a risk of apartment oversupply in the in-town market due to a significant amount planned, but over the mid- and long-term, apartments present a strong level of opportunity in the study area.

Actively selling communities in the surrounding area such as Inside Wade have had significant success with for-sale housing. Buyers have been young professional singles and couples; many relocating to the area seeking in-town housing options. Estimated market rate for townhomes would likely range from \$175,000 to \$250,000, and dense single-family homes (at a minimum of 7 per acre) would likely command \$250,000 to \$350,000. If condos were to be offered, they would likely range from \$135,000 to \$225,000. Each of these ranges is based on the values currently being achieved and the types of product offered. The ranges are meant to serve as a base and could certainly be higher for each of the products listed depending on design, market orientation, and amenities. In addition, as the residential market continues to strengthen, values are anticipated to increase as the demand pool grows.

### OFFICE

As mentioned, office currently represents the most significant private land use. The presence of Rex Health Care as well as strong access to major thoroughfares and a large executive household base within a 15-minute drive has made this an attractive location. However, the excess supply in the regional market has slowed the delivery and absorption of space. The most recently constructed office building in the study area was in 2007. The study area lies in the West Raleigh office submarket, which currently has 11.5% vacancy, compared to 18.5% in the region overall. The current office spaces in the District are a combination of surface and structured parking developments. While office with structured parking would allow for greater density, it may be challenging to deliver in the short-term given market rates and costs to construct. Over the mid- and long-term, we anticipate that office will continue to be a strong use in the District; particularly medical office. In the short term the opportunity for non-medical office may be more limited until excess supply burns off; however, in the next two to five years, with the addition of retail, the office opportunity is likely to grow. Employment

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projections and demonstrated captures suggest an average annual opportunity of 50,000 to 70,000 square feet per year in the District from 2014 and beyond. Currently, office rates in the area range from \$20 to \$24 for newer full service, stand-alone buildings, and \$23 to \$28 for space in higher density office buildings integrated in to a mixed-use project. In addition, medical office space rates for newer space ranges from \$23 to \$26 per square foot.

#### INDUSTRIAL

Industrial users typically seek locations with strong access and moderate land values. While the area has excellent access, the limited land availability and demand opportunity among other, higher value land uses suggests this is a less-preferred development opportunity as the area begins to re-develop and land values continue to climb. Of the industrial uses, warehouse is likely to present the greatest short-term opportunity. However, as stated, achievable rates and land costs will likely make it cost prohibitive. Current rental rates for industrial range from \$8 to \$13 per square foot, on a triple-net basis.

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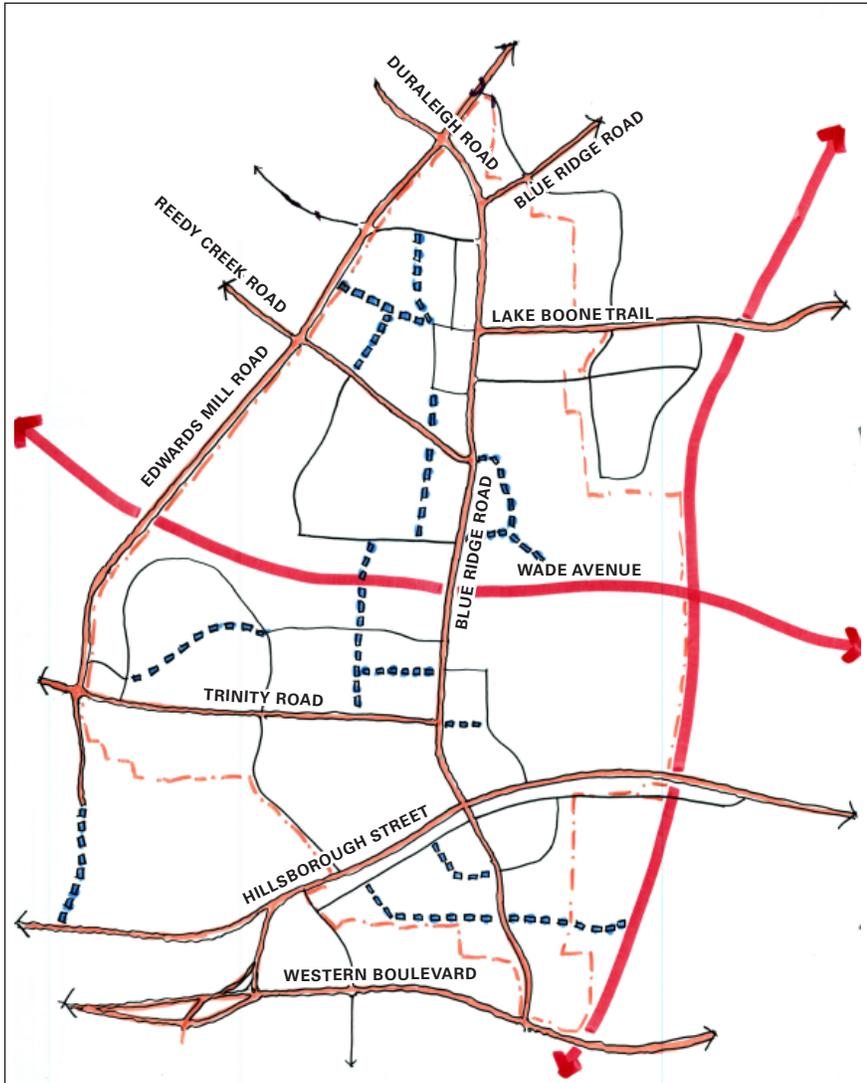
# DESIGN OPPORTUNITIES

## Design Principles

The analysis shown previously revealed a series of opportunities throughout the District which evolved into design principles to guide the plan. The key themes that emerged are as follows:

- » Improve Connections
- » Transform Blue Ridge Road
- » Overcome the Transit Gap
- » Connect Natural Features and Existing Activity Nodes
- » Create Distinct Districts

## Improve Connections



*The above diagram illustrates an early analysis of potential connections. This was later refined as the plan framework evolved.*

A key to providing a framework for development is to enhance local connections which improve pedestrian safety, multi-modal circulation, and provide options for vehicular traffic to alleviate pressure on a corridor. The following opportunities exist to build on the existing network:

### Create strong regional transportation infrastructure and accessibility

The creation of key roadway linkages and a localized street grid can reduce congestion, vastly enhance pedestrian and bicycle movement, and provide a local roadway and street network supportive of mixed-use development.

### Embrace North Carolina Department of Transportation (NCDOT) planned roadway improvements

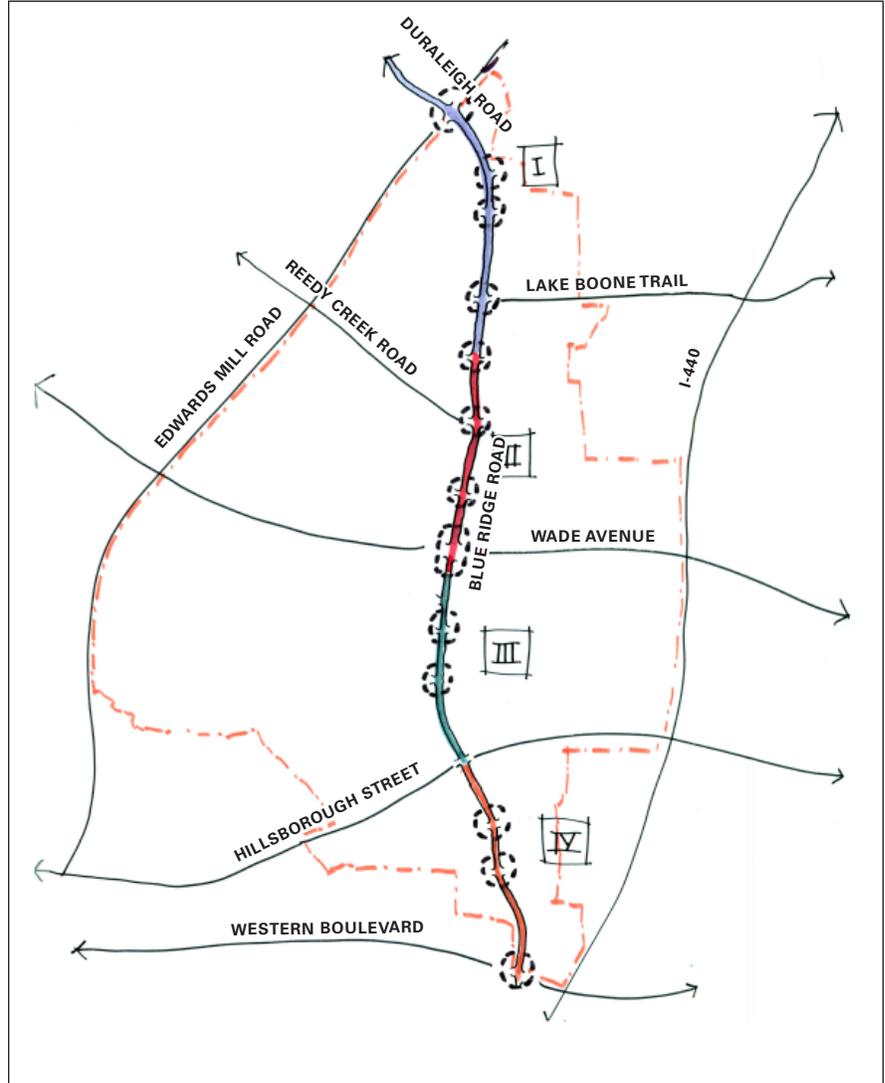
Embrace the NCDOT initiatives for grade separated intersection of Blue Ridge Road, the Rail line and Hillsborough Street, as well as potential bridge replacements at Wade Avenue.

# DESIGN OPPORTUNITIES

## Transform Blue Ridge Road

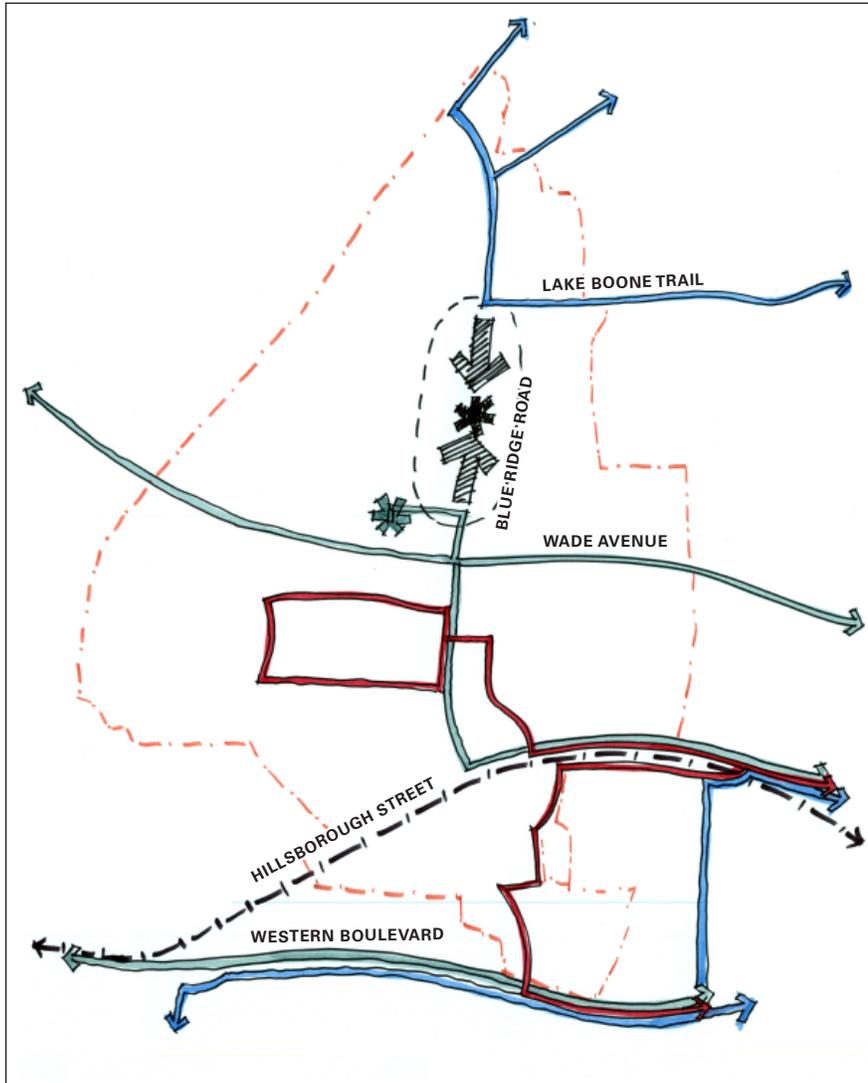
The existing configuration of Blue Ridge Road prohibits the development of a greater intensity of uses along it. Therefore design solutions must address improvements to the aesthetics of the corridor including streetscaping, lighting, and street furniture. Other elements include:

**Complete Streets Program planned for the Corridor**  
The NCDOT has identified the corridor as a demonstration project for its Complete Streets initiative. This initiative will address interdependent, multi-modal transportation networks that safely accommodate access and travel for all users.



*The above diagram illustrates how the character may vary along the length of the corridor. The circles identify key intersections to address for pedestrian mobility.*

## Overcome the Transit Gap



*The above diagram illustrates existing transit lines, and highlights the existing transit gap between Lake Boone Trail and Wade Avenue.*

Currently there is strong east/west transit throughout the area which is provided by various entities. Yet it has become clear that there is a 'transit gap' in the north/south direction along the corridor. Therefore efforts must be made to study the existing systems and see how this can be rectified. Potential considerations include:

**Leverage light rail and long range multi-modal plans**

Leverage the potential long-term plans for light rail station with existing multi-modal transit opportunities, either planned or in place. Special emphasis on connections between NCSU, Downtown and the Crabtree Retail Area and the Blue Ridge Road District.

**Provide a North/South Shuttle**

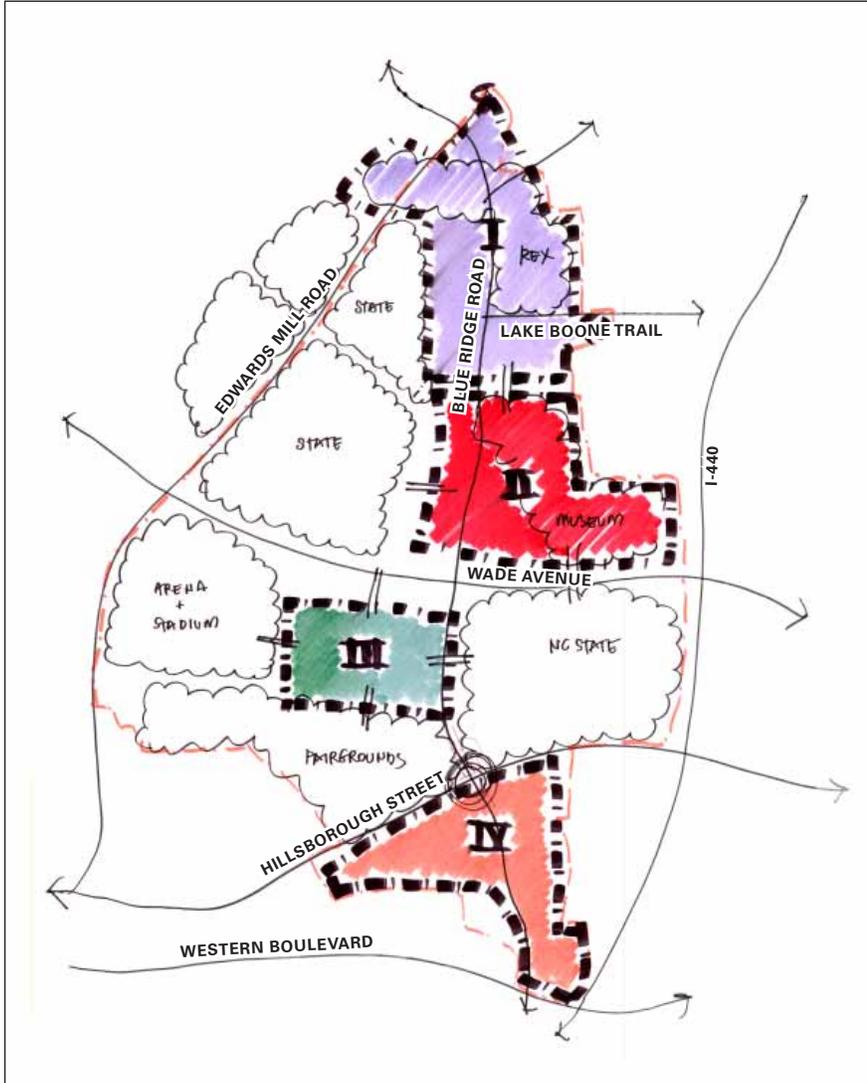
Implement a shuttle bus service along the entire length of the corridor, from Western Boulevard to Crabtree Mall.

**Explore enhancements to existing transit Service.**

Investigate the cost and applicability of enhancing both regional and local bus service through the extension of existing routes and adding additional bus service to existing routes.



## Create Distinct Districts



The diagram above illustrates the notion of considering the corridor as a series of distinct districts tied together by Blue Ridge Road.

Currently Blue Ridge Road is lined by diverse uses and facilities, resulting in a lack of unifying character or identity for the District. Given the presence of strong anchors such as Rex Health Care, the NCMA, and NCSU, the opportunity exists to create a series of distinct districts, each with their own unique character and amenities. The length of the corridor lends itself to this approach, using streetscape and signage elements to unify the corridor as a whole. Elements of this approach include:

**A concentration of regional and Statewide visitor destinations**

The NCMA, PNC Arena, Carter-Finley Stadium, State Fairgrounds, and JC Raulston Arboretum coupled with the economic/job generators of Rex Health Care, NCSU, and State Government provide a strong opportunity to establish a thriving 24/7 district.

**Emerging market trends support mixed-use districts**

The projected growth of Raleigh and the emerging market demands for transit, higher density housing options and mixed uses combine to give the District a distinct opportunity.

