

# City of Charlotte Estimated Development Potential For Transit Corridors & Activity Centers 2008 – 2035

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## CITY OF CHARLOTTE—ESTIMATED DEVELOPMENT POTENTIAL FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

### Background and Objectives

In January of 2009 the City of Charlotte retained Noell Consulting Group to analyze long-term growth trends in Mecklenburg County and to identify the amount of development that can be expected to occur in transit corridors and key activity centers in the coming 27 years. Understanding the potential amounts of growth that can be reasonably expected to occur in this area will assist the City's long-term planning efforts not only in these areas, but throughout the county as a whole. Included in the areas examined are:

- 41 existing and planned transit stations along the South, North, Northeast and Southeast transit corridors;
- Nine activity centers (Center City, Northlake, University Research Park, Cotswold, Southpark, Ballantyne, Coliseum, Whitehall, and Steele Creek); and
- Three planned streetcar corridors (Central, Beatties Ford, and Wilkinson Boulevard).

To this, our objective in this effort is to understand macro (national, regional) and local (county and sub-county) trends and conditions occurring today and in the coming years and, placing these key areas in the context of these trends, and identify the level of growth that is likely to occur in each of these areas as well as in the remaining portions of the county. Land uses examined include higher-intensity residential uses (attached for-sale and rental product, as well as higher-intensity detached for-sale development), office, and retail uses. As with previous efforts, growth will be allocated to each station area and activity center, noting the growth in population, households, and employees likely to occur from these land uses in each area in 10-year increments through 2035.

As noted, similar efforts have been conducted for each of the transit corridors in the past five to six years. It is important to note, however, that in each case growth was allocated only to the corridors studied and not to the other activity centers and wedge areas of the county. As such, this analysis represents a more comprehensive and detailed examination and allocation of growth than those previous studies were able to provide.

### Approach and Key Assumptions

The approach to this analysis was both top-down and bottom-up; bracketed by key assumptions and constraints relative to the total amount of population, household, and employment growth occurring in the county over time, but incorporating trends, conditions, development projects, and location considerations affecting development potential within individual station areas and activity centers.



A number of key assumptions were incorporated into this analysis and are described below.

- The U.S. economy will rebound in the coming two to three years and will again gain forward momentum, both experiencing peaks and recessions cyclically in the coming decades. To this, the current recession will not become a depression and will not have a long-term paralyzing effect on the development of real estate in the country.
- Growth and development of real estate are not assumed to continue at the torrid and unsupportable pace which occurred throughout the mid 2000s and a more tempered level of growth is assumed to occur; one in which demand and supply operate in equilibrium over time.
- Total estimated household growth (202,141) and employment growth (450,827 jobs) for Mecklenburg County between 2005 and 2035 are based on estimates provided by the City and are matched by 10-year increment through the time period studied (2005, 2015, 2025, 2035). These levels of growth are indeed below those seen in the first 8 years of this decade.
- Employment growth estimates by job type are based on previous studies conducted by the Lee Institute for the City of Charlotte;
- Transit system development that provided for the creation of the North and Northeast lines between 2014 and 2017, and the Southeast line after 2020;
- Proactive policies to encourage development of higher-intensity residential and commercial uses in centers and corridors and away from the wedges (areas outside of both);
- In increasing share of lower-density (conventional) single-family development will shift out of Mecklenburg County as the county continues to approach “build-out” and development of such product becomes less and less feasible;
- Similarly, preferences for both attached for-product (condos and townhouses) and higher-intensity detached product (aka TND development) will increase as those that value more square feet and lot size for the money increasingly opt to purchase outside of the county; and
- Charlotte’s economy will rebound and the impacts of the banking fallout will not be crippling long-term. To this, the overall health of the banking industry will return over time with both Bank of America and Wells Fargo maintaining a substantial commitment to the Charlotte area over time.

Finally, it should be noted that this analysis differs from previous efforts in several key ways. First, it focuses solely on those higher-intensity land use desired in station areas and activity centers and does not include uses such as conventional single-family detached residential, flex office (business park space), or industrial land uses. Second, the station area allocations apply to an approximate ¼-mile radius around each station; smaller than the ½-mile radii looked at previously. And finally—perhaps most importantly—this represents the most comprehensive analysis conducted to date, not only analyzing station areas in all four corridors, but analyzing the nine activity centers and measuring impacts to the wedge areas as well.



**Executive Summary**

Over the next 27 years Mecklenburg County will become an increasingly urban county, with demographic and economic growth trends favoring intensification of residential and commercial uses in key activity centers and in the four major transit corridors in the county. Trends supporting this intensification include:

- A growing demand for attached product (townhouses, condos, and apartments) resulting both from market preferences and issues of affordability;
- Land economics and demographic trends resulting in a greater share of single-family detached homes being built at higher-intensities relative to conventional single-family product that has dominated the county historically;
- A greater preference for areas that are highly walkable, diverse in land use and people, and convenient; and
- Office users increasingly favoring areas with a higher-quality environment for their employees, including areas with residential components and that, again, are walkable and convenient.

Given these larger trends and others more immediate to the Charlotte area, the four transit corridors and the activity centers studied (nine in total) are expected to gain market share in the coming years, capturing more than 40% of all new residential growth, 78% of new office growth, and more than half of the new retail growth.

**Capture Shifts by Area and Product, 2000 - 2035**

Area	2000 – 2007	2008 – 2035
<b>Activity Centers</b>		
Residential	14.2%	18.1%
Office	66.2%	59.7%
Retail*	26.6%	24.6%
<b>Transit Corridors</b>		
Residential	11.8%	23.0%
Office	7.2%	18.5%
Retail	17.8%	28.5%
<b>Wedges</b>		
Residential	74.1%	58.9%
Office	26.6%	21.8%
Retail	55.6%	46.9%

\*NOTE: Activity Centers Historic Captures of Retail include Northlake Mall

The City of Charlotte and the four towns traversed by transit corridors should seek to focus infrastructure and policy efforts to bolster the corridors and station areas. The large-scale transit investments being made represent a significant commitment to a centers and corridors growth policy and effectively shifting growth patterns will require other, smaller investments as well. Such investments include streetscaping, parks and open spaces, increasing walkability, and other placemaking efforts.



Growth in the transit corridors will be strongest inside of Route 4 and in greenfield areas, as well as in the small towns along the North Corridor. More challenging will be an aging suburban area just beyond Route 4 where redevelopment and intensification are often infeasible given the high costs of redevelopment and the limited upside premiums these areas can generate. The City should focus on value creation in these areas through the use of the tools noted in the preceding paragraph as well as other potential policies including razing of failing retail space that limits the perception and attractiveness of some areas.

When factoring for station areas not previously examined, growth estimates for the station areas along the four corridors overall are generally in line with those of previous studies, with a few key exceptions:

South Corridor: Office and retail growth are lower due to challenges of redeveloping those uses from Woodlawn South, while residential is higher due to its strong reception in the corridor;

North Corridor: Relative to the Glatting/RCLCO Allocations, captures are higher across all land uses, although these captures are somewhat lower than those provided in a study for Cherokee Fund in 2008 (see below);

Northeast Corridor: Greater retail allocations in large part due to Belmeade project & IKEA location;

Southeast Corridor: Residential allocations sharply lower given stagnation of much of the Independence Corridor and challenges with facilitating new development.

	Current Study			Glatting/RCLCO Allocations		
	Office	Retail	Residential	Office	Retail	Residential
South Corridor*	2,090,972	1,146,607	16,714	2,054,598	1,125,000	8,034
North Corridor*	2,839,124	1,715,718	12,618	1,349,384	911,663	6,522
Northeast Corridor	3,068,617	1,815,021	11,543	3,191,049	925,195	10,623
Southeast Corridor	2,198,511	790,515	8,904	2,288,187	1,105,337	15,306
<b>Four Corridors</b>	<b>10,197,224</b>	<b>5,467,861</b>	<b>49,779</b>	<b>8,832,218</b>	<b>4,067,195</b>	<b>40,485</b>

\*NOTE: Previous analyses conducted by Glatting/RCLCO did not analyze opportunities for the following station areas: South End and I-485 in the South Corridor and Hambright in the North Corridor.

The above numbers for the North Corridor are somewhat lower than those provided in an analysis of the corridor in 2008. There are several key factors contributing to the overall downward shift from those numbers:

- A more comprehensive look at growth going forward, examining not only the corridors, but the activity centers and wedge areas as well;
- Somewhat more conservative long-term demographic growth estimates than those used in previous analyses resulting in a smaller pool of demand; and
- Changes in station area definitions (1/4-mile radius utilized in this analysis) and products examined (conventional single-family detached and flex office were not included in this analysis).





### Trends Impacting Growth in the Coming Decades

Several large-scale trends, conditions, and factors impacted the allocation process, including larger economic and demographic trends occurring throughout the U.S. as well as local trends and conditions more specific to Charlotte and Mecklenburg County. The following is a brief discussion of these trends and their implications on growth in Mecklenburg County.

#### Walkable Places Will Gain in Market Share

Walkable environments, including intown areas, activity centers, smaller town centers in the region, and potentially station locations, are poised to achieve greater shares of housing growth and demand in the coming decades, and thus will be well-poised to capture greater retail and office demand. Three major trends will create this increased demand potential.

- Much higher preferences for walkable, diverse, and convenient communities among Generation Y (those born after 1978) households, a massive age cohort that will hugely influence growth in the Charlotte region. This generation sees little value in long commutes and favors areas convenient to work, shopping, and recreation. Consumer research conducted by RCLCO with Gen Y's throughout the US revealed that more than 2/3 believe living in a walkable community is important and 1/3 will pay extra to do so. Roughly one-half of those surveyed indicated they would trade lot size or home quality to live in an area that better met their lifestyle priorities.
- The Baby Boomers, the group which has driven real estate over the past several decades, are increasingly transitioning from being family households with children to becoming empty nesters. This transition is significant as many of these households have traditionally lived in locations which are best for their children (typically suburban areas with large lots, cul-de-sacs, good schools) and are now opting for more convenient, accessible locations that offer a lifestyle more suitable to their needs.
- The majority of household growth in Charlotte and the US will be among households without children living at home. Over the past decade, and in the years to come, single-person households, roommates, and childless couples will account for the large majority of household growth. These groups are far more likely to opt for homes on smaller lots or attached product (townhouses, condominiums, or apartments) than families with children and are ideal candidates to live in more dense environments, including activity centers and transit-oriented areas. As Generation Y ages, households with children will again rise. As noted earlier, however, their commitment to walkable areas like intown communities, activity centers and potentially station locations, will remain intact and will fuel continued growth in these areas.



#### Demand for Higher-Intensity Products Will Increase

The aforementioned demographic shifts will also fuel demand for attached products—both rental and for-sale—as well as for higher-density single-family detached products in the coming years. As noted, lifestyle is playing an increasingly critical role in people’s lives today and will increasingly do so in the coming decades. This includes living in homes that offer lower maintenance, and are located in interactive, pedestrian-oriented, mixed-use communities. In the past five years, attached for-sale condominiums and townhouses have accounted for more than one-fourth of all new home sales in Mecklenburg County. In addition, numerous Traditional Neighborhood Developments (TNDs) have been developed throughout the county and small-lot infill products have been on the rise in areas considered built-out.

The increased shares of attached and higher-density single-family detached homes relative to all new home construction will also be driven by higher land prices and a decreasing supply of land availability in Mecklenburg County. Many buyers will still define value as the most home or land for the money and those buyers are increasingly opting to live outside of Mecklenburg County. They will increasingly do so in the future and will “drive for value” to find a home with the desired square feet and or lot size they can afford.

All of these factors, as well as additional local trends and analyses will impact growth in the coming decades in Mecklenburg County and will create significant opportunities for development and redevelopment in the key activity centers and in the transit corridors. Focusing infrastructure and policy initiatives to encourage and support that growth; particularly in the realm of placemaking and facilitating walkable, attractive environments, should a priority for local government.

#### **Sizing the Growth in the Coming Decades**

As noted previously, growth estimates at a county level were provided by the City of Charlotte for use in this analysis. These growth estimates provide for roughly 202,400 new households between 2005 and 2035, and 450,800 jobs during that same timeframe.

#### Residential

Given the shifting demographics nationally and in Mecklenburg County, increasing preferences for more urban products and areas, and the growing inability to feasibly develop lower-density detached homes in the county in the coming decades, we estimate that nearly two-thirds (approximately 130,000 units) of the housing units developed in the coming 27 years will be in the form of these higher-intensity products. Included in this will be a growing amount of attached for-sale and rental products, which will account for half (100,000) of all units built in the county during the timeframe examined. The remaining half of the units built through 2035 will be a mix of small-lot and more conventional-lot single-family detached homes; down from more than 58% of the new residential units delivered thus far this decade.



**Share of Residential Units Demanded by Product Type, 2000 - 2035**

Product	2000 – 2007	2008 – 2035
Attached (rental & for-sale)	41.7%	49.5%
Single-family detached	58.3%	50.5%

Activity centers and the transit corridors are poised to account for an increasing share of this higher-intensity development in the coming 27 years. Activity centers have already accounted for more than 14% of all new housing units delivered in the county over the past eight years and are expected to increase their share to more than 17% capture in the coming 27 years. More significant captures of demand are anticipated in the transit corridor station areas, which have accounted for roughly 11% of demand in the past eight years, but could capture more than 23% of total residential unit deliveries in the coming decades. It should be noted that more than half of the units captured in transit corridors in the past few years have been single family units, including lower-intensity detached homes. Going forward, that mix will shift more decidedly to attached products and higher-density detached homes as projects like Bryton, Griffith Lakes, and Antiquity come online and the development of areas like South End, New Bern, and Scaleybark gain momentum.

**Residential Capture Shifts by Area/Product Type, 2000 - 2035**

Area	Product	2000 – 2007	2008 – 2035
Activity Centers	Detached	3.6%	4.1%
	Attached	10.6%	13.2%
Transit Corridors	Detached	5.0%	5.5%
	Attached	6.8%	17.8%
Wedges	Detached	49.7%	40.9%
	Attached	24.4%	18.6%

The significantly stronger captures by transit corridors can be achieved again not only through the implementation of transit, but through the provision of other infrastructure to attract and anchor development, particularly in previously-developed suburban areas where redevelopment may require a greater push.

It is also worth noting that the Wedge areas of the county, those areas between the transit corridors and outside of the major activity centers, will gradually surrender market share as conventional single-family development opportunities increasingly shift outside of the county and demand for these higher-intensity products and more urban, walkable environments grows.





Commercial

As with residential, long-term growth numbers provided by the City were utilized to estimate the amount of office and retail development that could be experienced in the county in the coming 27 years. On average, more than 1.7 million square feet of office space will be demanded annually in Mecklenburg County in the coming 27 years. This estimate is based on three major sources:

1. Employment growth projections by type of employment for Mecklenburg County;
2. Historic deliveries of office space provided by the City; and
3. Speculative office space absorption in Mecklenburg County thus far this decade.

As has historically been the experience, the activity centers will continue to receive the bulk of office demand in the coming decades, with transit corridors becoming increasingly competitive as areas like Hambright/Eastfield, South End, and parts of University City see new projects establish and re-establish these areas as stronger office plays.

**Office Capture Shifts by Area, 2000 - 2035**

Area	2000 – 2007	2008 – 2035
Activity Centers	66.2%	59.7%
Transit Corridors	7.2%	18.3%
Wedges	26.6%	22.0%

Retail development in station areas was derived differently from residential and office, as retail is a follower land use, specifically reacting to residential growth primarily, and to office growth in key areas as well. Retail therefore reacts similarly to these other uses, with station areas showing significant growth, activity centers losing slight share to these emerging locations, and wedges losing market share over time as conventional single-family products fill out these lower-intensity areas. Support for retail in activity centers and station locations also can be found in the evolving retail market, which has seen oversupply of stores throughout the US and stores in weaker locations, including on the suburban fringe, struggling to compete. It is therefore likely that many retail chains will opt to maintain fewer, stronger positions in the market going forward, and seek established and highly accessible locations over newer, greenfield areas.

**Retail Capture Shifts by Area, 2000 - 2035**

Area	2000 – 2007	2008 – 2035
Activity Centers	26.6%	24.6%
Transit Corridors	17.8%	28.5%
Wedges	55.6%	46.9%



A couple of notes should be added to the previous table to explain some of the significant shifts occurring:

- Nearly two million square feet (almost half) of the capture of the corridors can be found in two large projects—Bryton on the North Corridor at the Hambright Station, and IKEA, Belmeade and University Crossing on the Northeast Corridor at the University City Boulevard Station;
- While the Activity Centers are projected to drop in share overall, it is important to note that Northlake Mall was delivered in the past eight years and represents the last super-regional mall to be developed in the county—netting out that mall reveals a slightly increased capture for the activity centers overall.

### Activity Center Allocations

As noted throughout this report, activity centers are expected to continue achieving strong captures of office demand in the coming decades, and will continue to emerge as more diverse and balanced areas, with new residential and retail uses complementing the office development. Over time, these activity centers will need to focus on becoming dense urban neighborhoods as opposed to merely commercial cores, with greater attention being paid to issues affecting quality of life in the cores; walking ability, parks and open spaces, neighborhood retail opportunities, etc.

#### Estimated Achievable Captures of Demand, 2008 - 2035

Activity Center	Office Capture	Residential Capture	Retail Capture
Center City	6,943,329	7,435	689,971
Southpark	2,558,279	1,941	534,315
Cotswold	425,161	149	169,212
Ballantyne	6,802,571	5,949	546,431
Coliseum	1,614,912	1,861	300,542
Whitehall	6,055,922	6,047	710,029
Steele Creek	403,728	930	336,035
Northlake	2,002,062	4,297	688,160
Univ Research Park	3,387,057	3,889	705,950
<b>Totals</b>	<b>30,193,022</b>	<b>32,499</b>	<b>4,680,644</b>

The following summarizes each of these activity centers at a macro level of analysis.

#### Center City

Office absorption, while still the strongest in the region, will moderate somewhat as the thirst for space by Wells Fargo and potentially by Bank of America subsides. Residential growth will continue, but will be increasingly challenged by dense residential growth in areas around Center City that are able to provide a stronger sense of neighborhood than Center City has achieved to date. Finally, retail opportunities are



significant, although delivery of that retail potential may be a challenge given smaller block sizes, and the need for all parking to be decked.

#### Southpark

While land constrained, Southpark is evolving into an affluent urban neighborhood and should continue to see strong residential growth, with office growth being somewhat moderate, but still filling intensely in core locations. Southpark's role as one of the highest-end retail cores in the Southeast will continue to fuel retail in increasingly urban formats, with a greater amount of neighborhood retail being developed to meet demand from area residents.

#### Cotswold

Well-situated regionally, Cotswold is limited by its lack of freeway access and its lack of significant redevelopable land. The core should see modest growth, but could see intensification of the Cotswold Mall site itself into more of a town center, pedestrian-oriented format.

#### Ballantyne

The pre-eminent office core of the past decade, Ballantyne is well-positioned to maintain its strong office growth, with surface parking giving way to decking as rents and land prices increase. Retail opportunities remain significant in this core as it represents the strongest town center location in the region, although land assembly issues may be a challenge to delivering this space. Finally, the affluence of the area and the massive office growth expected should fuel demand for increasingly urban residential product in the area, transforming it from an office-driven core to a stronger mixed-use environment on each side of US 521.

#### Coliseum

For the past 20 years, the Coliseum area has functioned as an attractive office core situated between the region's executive households and the airport. The core, however, has lacked any significant retail or residential component and has never transitioned to much more than an office park. Further, the Coliseum area's position in the market is being eroded significantly by Whitehall, which enjoys the location advantage that Coliseum does, but features superior freeway access and greater proximity to a larger pool of executives. CityPark will be critical to the Coliseum area's success and its ability to regain momentum. Should the project be well-received by the market, Coliseum's close-in location could be highly attractive. A project not as well received by the market could hasten the aging process of the Coliseum area and further stall its momentum.

#### Whitehall

As noted, Whitehall has significantly eroded the Coliseum area's position in the market and has benefited from its price-alternative position relative to Ballantyne. With abundant land remaining for development, Whitehall should be poised to achieve strong office absorption going forward. Long-term, however, it is important for a stronger retail component and increasing residential component to continue fueling that



office growth. Much of the housing surrounding the Whitehall area today is mixed in quality and the majority of Whitehall-area retail is focused on a discount position, and could temper the area's attractiveness over time.

#### Steele Creek

Bolstered by executive housing growth proximate to Lake Wylie, Steele Creek has seen an explosion of retail growth in the last few years. The core will continue to see growth in the coming decades, but will be tempered by its limited regional access and will thus focus as a neighborhood or district activity center as opposed to a regional one. Office, retail, and residential growth will continue, but will likely remain more horizontal in nature, gradually transitioning to more intensely-developed uses over time.

#### Northlake

Among the newest activity centers, Northlake is benefitting from several factors, including a new regional mall, access to executive housing to the north, and the recent opening of I-485. Indeed, intensification of Northlake is already occurring, with low-rise business park space being replaced by new mid-rise office product. Retail and residential infill will continue along with the office demand, with much of the development utilizing surface parking. Over the next 10 to 15 years, development will likely become more intense and begin to support intensities necessitating structured parking. An issue impacting Northlake will be its ability to compete with significant office and retail supply at Bryton (Hambricht Station) and potentially around the Eastfield Station. Both areas enjoy access via I-485 and I-77, benefit from commuter rail service, and will be developed as a unified, master-planned community. As such, greater placemaking at Northlake will be critical to its long-term success.

#### University Research Park

Over the past 25 years, University Research Park has growth as a campus office location. Historically lacking a relationship with a research-oriented university, and lacking significant executive households nearby, the park has largely emerged as a campus-oriented, back-office destination. While URP will continue to occasionally attract large-scale users seeking this campus environment, those users are generally few and far between. Given this, greater diversification of the park—including more significant residential and retail components—is needed. The forested aspects of URP and its creek system lend well for it to capture a more green audience and may indeed allow it to capture some higher-end residential. Abundant and under-utilized land, particularly around interchange areas, may create opportunities for larger-scale retail, possibly in the town center format missing from the university area today.



## Corridor Allocations

The four transit corridors will experience significant private investment in the coming years and will greatly increase their share of demand for residential, office, and retail products. Demand opportunities will be strongest in greenfield locations where development is less costly, in infill locations closer to Center City (e.g. South End), and in smaller downtowns in the region (particularly Davidson, Cornelius, and Huntersville). As discussed earlier, aging suburban locations—most of which are not walkable environments—will require greater investments to stimulate value creation needed for feasible redevelopment to occur. This is true along all four corridors.

Transit is clearly the right direction for the City and County to pursue, and will enhance the attractiveness of these corridors. Focus by the City, County, and the smaller towns the corridors traverse, should be on improving the quality of life in the station areas through enhancing area walkability, improving streetscapes, providing open space, and locating civic anchors close to station areas. Transit alone can't shift the millions of square feet of space and thousands of residential units to these locations. Further targeting of infrastructure investments is a logical next step for the region to follow and will be needed to create growth opportunities more sustainable in the long-term.

The following summarizes growth allocations in each of the four corridors and highlights key issues and opportunities for particular station areas.

### South Corridor

As noted in the RCLCO report from 2003, growth opportunities in the South Corridor are greatest inside of Route 4, particularly in the South End area and emanating southward toward New Bern and Scaleybark. This still holds true today with the overwhelming majority of development interest being contained in those three station areas. Arrowood has also received significant attention and creates potential for other, more southern stations.

At issue from Woodlawn south is the unattractiveness, lack of character, and non-pedestrian orientation of South Boulevard. Aging retail centers, limited parcel depths, and the poor visibility of some station areas tempers the upside the region's first transit line can create. Of consideration to the City should be the creation of some kind of linear greenspace along the corridor to enhance pedestrian-orientations of the area, eliminate some unattractive land uses along South Boulevard, and provide needed park space along the corridor.

In addition to the three northern station areas, growth potential in the corridor is highest around the Woodlawn and Tyvola stations (which feature significant east-west connectivity) and around the I-485 station. This latter area is significant as it is strategically situated between Ballantyne and Whitehall, and is under-utilized with retail uses in a low-density format. Over time, property values should increase to the point where redevelopment of both the Carolina Pavilion center and the smaller retail uses along the western side of South Boulevard should become more attractive.





Estimated Growth Potential Around South Transit Stations, 2008 - 2035

	Current Study			Glatting/RCLCO Allocations		
	Office	Retail	Residential	Office	Retail	Residential
South End	657,916	386,670	4,241	NA	NA	NA
New Bern	163,236	59,250	1,580	173,628	250,000	975
Scaleybark	161,206	53,007	1,567	165,360	50,000	927
Woodlawn	315,411	168,138	1,142	689,000	300,000	1,855
Tyvola	474,596	176,659	2,017	909,480	250,000	1,855
Archdale	22,628	51,854	789	0	100,000	795
Arrowood	56,692	48,941	1,481	46,852	150,000	700
Sharon West	29,599	54,323	1,333	70,278	25,000	927
I-485	209,688	147,765	2,266	NA	NA	NA
<b>Total Corridor</b>	<b>2,090,972</b>	<b>1,146,607</b>	<b>16,417</b>	<b>2,054,598</b>	<b>1,125,000</b>	<b>8,034</b>

Factoring out the South End Stations and I-485, office and retail demand allocations decreased from the previous RCLCO study back in 2003. The Woodlawn and Tyvola stations in particular are now felt to have somewhat less development potential for these uses while parcel configuration, road networks, and the ability to fit more significant retail into certain station areas is felt to be a limiting factor for redevelopment in areas like Archdale and Sharon West. Overall, residential opportunities are on the rise in the corridor, bolstered by the strong performance of the South End and the potentially significant demand potential it creates in New Bern and Scaleybark.

North Corridor

The greenest of the four corridors, the North Corridor is poised to see significant growth in the coming years. This growth will be driven not only by the ease of developing greenfield areas, but also by the corridor traversing three attractive downtowns, an I-485 interchange, and its parallel location to I-77.

Development potential in the short-term will be strongest in the town center areas (Davidson and Cornelius in particular), and around the massive Bryton project at the Hambright station. The I-485 interchange area, which includes the Hambright and Eastfield station areas, has the potential to evolve into a regional commercial core given its immediate access to I-485, strong proximity to I-77, and access to the North line itself. While growth estimates provided below reflect these large-scale projects, it should be noted that these growth estimates do not incorporate conventional single-family development or flex office uses that may also locate in these centers.

This is true for the large-scale Griffith Lakes project, which may have a very large conventional single-family component beyond the numbers provided for below. Competition with the Northlake activity center, Hambright and Eastfield stations may temper Griffith Lakes' opportunities for delivering large-scale retail and office product to the extent planned.



Finally, the Derita, Huntersville and Sam Furr stations are envisioned to function more as neighborhood or district stations given their access, land availability, or both.

**Estimated Growth Potential Around North Transit Stations, 2008 - 2035**

	Current Study			Glattig/RCLCO Allocations		
	Office	Retail	Residential	Office	Retail	Residential
Derita	11,962	84,530	447	29,011	69,470	1,070
Harris	386,372	210,770	1,581	561,304	139,848	993
Eastfield	641,885	347,156	2,013	617,071	124,836	982
Hambright	1,219,376	694,311	2,920	NA	NA	NA
Huntersville	105,128	60,821	1,274	90,184	55,774	832
Sam Furr	184,116	98,954	1,473	27,320	98,114	1,557
Cornelius	138,205	147,360	1,530	24,524	328,421	974
Davidson	152,079	71,817	1,380	0	95,200	414
<b>Total Corridor</b>	<b>2,839,124</b>	<b>1,715,718</b>	<b>12,618</b>	<b>1,349,384</b>	<b>911,663</b>	<b>6,522</b>

The North Corridor has been examined in two previous studies, with the results from the Glattig Jackson/RCLCO analysis shown above for comparison. In 2008, RCLCO conducted a study for Cherokee Fund looking at the North Corridor and provided numbers that were higher overall for the corridor. In general, this most recent allocation analysis is more aggressive than the previous numbers conducted by Glattig & RCLCO, yet somewhat more conservative than those numbers provided in the Cherokee analysis. This is due to several factors:

- The Cherokee numbers reflect both a larger radius (1/2 mile—the Glattig numbers above represent a 1/4-mile radius);
- Conventional single-family residential and flex office were not included in this allocation exercise and were included in the Cherokee numbers;
- The Sam Furr station has moved north from around the Highway 73 intersection to Caldwell Station and thus functions more as a neighborhood station than a regional station from a market perspective given its reduced east-west access;

Northeast Corridor

The Northeast Corridor has experienced significant change in the past few years and really has emerged as three different corridors: the edgy intown district along North Davidson Street to NoDa; a struggling, aging suburban corridor along North Tryon from Sugar Creek to Tom Hunter; and a suburban corridor experiencing mixed success from University City Boulevard out.

The ongoing transition of the North Davidson Street corridor will continue to fuel strong opportunities for intensification around the three transit stations inside of Route 4 (Parkwood, 27<sup>th</sup>, and 36<sup>th</sup> Streets), including



residential, retail and creative office opportunities. From Sugar Creek to Tom Hunter, however, retail abandonment, limited interstate access, and economic stagnation will temper those areas. Identifying the means to stimulate value creation will be important to fueling redevelopment and intensification of this portion of the corridor.

The University City stations are particularly intriguing going forward, with several large-scale potentially catalytic projects potentially giving the corridor a much-needed boost. While North Tryon in this area has seen significant development in the past decade, it shows signs of struggling in the future—the cracks are showing. That said these four catalytic projects could provide a significant boost to the long-term viability of the corridor:

- The large-scale Belmeade project and reconfigured North Tryon/University City Boulevard intersection could should create a stronger southern anchor to the University City area and facilitate development on the east side of North Tryon;
- UNC-Charlotte, while not the catalytic entity it could have been historically, will have significant impacts with its on-campus station, planned development of a village along Mallard Creek Church Road, and its new front door onto North Tryon Street (including the CRI).
- In addition to UNC-Charlotte’s planned mixed-use village on Mallard Creek Church Road, an additional large-scale build-to-suit office project has been proposed along Mallard Creek Church Road and could stimulate greater interest in the “east of 85” office market, which is very quiet today.
- Finally, a fourth catalytic development, University Place, may see redevelopment in the coming years and, if conducted in a more urban manner and received well by the market, creates additional potential upside beyond the numbers provided below.

**Estimated Growth Potential Around Northeast Transit Stations, 2008 - 2035**

	Current Study			Glattig/RCLCO Allocations		
	Office	Retail	Residential	Office	Retail	Residential
Parkwood	128,857	79,047	1,139	222,679	22,381	263
27th Street	97,642	44,308	1,027	129,443	45,481	904
36th Street	129,277	108,628	1,631	130,471	36,033	538
Sugar Creek	34,792	83,447	377	267,637	110,895	833
Old Concord	33,570	107,009	448	223,911	92,678	936
Tom Hunter	33,570	47,421	448	150,299	91,238	1,215
Univ City Blvd	270,587	716,137	1,454	489,044	150,757	1,823
McCullough	411,629	102,290	1,086	546,957	140,124	1,499
JW Clay Blvd	434,881	86,825	1,658	740,494	71,752	841
UNC Charlotte	0	0	413	NA	NA	NA
Mallard Creek Church	1,344,129	119,590	1,017	290,114	60,514	683
I-485/N. Tryon	149,682	320,318	846	220,196	103,272	1,388
<b>Total Corridor</b>	<b>3,068,617</b>	<b>1,815,021</b>	<b>11,543</b>	<b>3,191,049</b>	<b>925,195</b>	<b>10,623</b>



When examining the previous analyses for the corridor, a couple of items emerge that bear discussion:

- With the exception of the Mallard Creek Church Station, office demand in much of the corridor is lower than previously forecasts and reflects the issues present in the North Tryon/East of 85 office market, which suffers from aging product and no sense of location or identity—enhancing this identity through placemaking, streetscaping (which is planned), greenway systems, and greater pedestrian orientations could create upside for this market;
- The large amount of retail at University City Boulevard Station reflects the Belmeade retail and IKEA, which was delivered in 2009. Beyond the retail already planned and zoned at that station, no further retail is estimated to be needed.

### Southeast Corridor

Like the Northeast Corridor, the Southeast Corridor generally has three distinct segments: a bustling intown area, a struggling & economically-challenge suburban corridor, and a newer suburban corridor towards the end. That said, the Southeast Corridor has seen far less development than the Northeast and its short-term development potential may be somewhat more limited.

Redevelopment and intensification of the Elizabeth and Pecan (Plaza/Midwood) areas is planned and certainly will occur. Briar Creek and Amity Gardens are also likely to benefit from their intown orientations and proximity, although the lack of major cross-streets around these station areas will temper development potential and a clean-up of Independence via transforming it into a full-blown freeway may be needed to change perceptions of these station areas. Certainly, razing abandoned retail uses, which will not return in the scale or format found currently in the corridor today, is necessary to provide a clean slate from which new development can occur.

Beyond Amity Gardens, from Sharon Amity to Village Lake, development potential is very difficult and growth allocated to the corridor has been significantly reduced. This area in particular is suffering from a lack of value generation, with no major anchors, high redevelopment costs (relative to greenfields) with little premium potential (relative to intown areas), no pedestrian orientations and a lack of green space. In addition, the terrible perception of Independence Boulevard and the continuously-delayed, but always hovering, reconstruction of the corridor continues to create a sense of constant uncertainty. Coming up with a strong plan for the Independence Corridor and implementing an aggressive road construction and infrastructure enhancement project in the corridor will be needed to spur growth beyond that shown in the numbers below.

New development at Sardis North should spur redevelopment of the aging Crowne Point retail center, while infill opportunities are relatively good around the Independence Pointe and NC 51 station areas. The final two stations, Matthews TOD and CPCC, benefit from I-485 visibility, but are tempered by challenging access and thus will function as sub-regional station areas from a market perspective.



**Estimated Growth Potential Around Southeast Transit Stations, 2008 - 2035**

	Current Study			Glatting/RCLCO Allocations		
	Office	Retail	Residential	Office	Retail	Residential
Elizabeth	248,348	151,792	1,412	72,255	23,122	255
Pecan	126,195	81,200	1,431	91,258	80,063	1,140
Briar Creek	60,881	11,549	841	174,345	69,661	886
Amity Gardens	135,347	116,031	747	137,388	83,095	1,115
Sharon Amity	76,807	17,747	470	86,412	85,604	1,190
Conference Drive	51,699	28,503	416	59,361	98,097	1,449
Village Lake	159,565	37,146	483	142,278	103,568	1,436
Sardis	301,290	103,281	908	186,459	161,050	2,288
Independence Pointe	120,752	49,560	522	104,054	62,164	1,248
Highway 51	389,683	62,220	697	481,042	98,959	1,167
Matthews	155,059	42,467	540	164,330	160,039	2,308
CPCC	372,885	89,019	437	589,005	80,455	824
<b>Total Corridor</b>	<b>2,198,511</b>	<b>790,515</b>	<b>8,904</b>	<b>2,288,187</b>	<b>1,105,337</b>	<b>15,306</b>

**Corridor Summary**

While growth allocations have been adjusted from previous analyses—sometimes upward and sometimes down—development potential along the four corridors still remains quite significant in the coming decades. In nearly every case, each of the corridors is expected to see significant growths in captures of demand in the coming decades across each of the targeted land use. To capture this demand in some locations, particularly in those aging suburban areas, the City and towns will need to invest in creating value and upside through streetscaping, parks and greenways, greater pedestrian orientations, and placemaking efforts. In some cases this should include buying out and razing aging retail centers that are now obsolete in today’s market.

**Capture--Four Corridors--2000 - 2007**

	Office	Retail	Residential
North	2.1%	3.4%	5.9%
Northeast	1.1%	3.8%	3.3%
Southeast	1.9%	7.1%	1.3%
South	2.1%	3.5%	2.0%

**Capture--Four Corridors--Projected**

	Office	Retail	Residential
North	5.0%	9.0%	5.9%
Northeast	5.8%	9.5%	5.2%
Southeast	3.9%	4.0%	4.2%
South	3.8%	6.0%	7.7%





### Streetcar Corridors

In addition to the four larger transit corridors, the City is planning the creation of three streetcar corridors along Central Avenue, Beatties Ford Road, and Wilkinson Boulevard. While not the major focus of this analysis, the following represents an initial assessment of growth potential in these corridors.

#### Central Avenue

Demand potential in the Central Avenue corridor will be strongest inside of Eastway Drive, building on the momentum being seen in the Elizabeth and Pecan (Plaza/Midwood) areas. Further upside is being created by the Morningside Village project just off of Central Avenue and the Seigle Point redevelopment closer to Center City.

The eastern portion of the corridor represents a longer-term play and is heavily driven by the redevelopment of Eastland Mall. Like Independence Boulevard, the aging apartments and retail uses represent redevelopment opportunities but value creation must occur for such redevelopment to become feasible. A successful Eastland Mall redevelopment could certainly spearhead that value creation.

As shown in the table below, development intensification along Central Avenue would be significant, particularly when factoring in development around the Elizabeth and Pecan transit stations along the Southeast Corridor.

Central Avenue Streetcar Corridor Captures			
	Office	Retail	Residential
Elizabeth Station	248,348	151,792	1,341
Pecan Station	126,195	81,200	1,360
Remaining Corridor	135,579	358,572	2,543
Total	494,671	591,564	5,091

#### Wilkinson Boulevard

Like Central Avenue, demand potential for office, retail and residential products in the Wilkinson Boulevard corridor increases with proximity to Center City, with the overwhelming bulk of demand for all three products being highest east of Ashley Road. The area around the Morehead/ Wilkinson intersection east along Morehead in particular builds on a number of major strengths supporting significant office and residential demand, as well as new retail growth, including:

- Strong regional access via I-77 interchanges;
- Proximity to Center City and airport-area jobs;
- Great views of Center City, particularly from Morehead;



- Market momentum from both the recent loft and residential development along Morehead and the law school’s location on Wilkinson.

Beyond Ashley Road the dynamics of the corridor break down significantly, as the corridor becomes more impacted by airport noise and uses, becomes more fractured by industrial uses, and features challenging trade areas for retail development. Business park/flex space and industrial uses may be the strongest opportunities in this area.

Wilkinson Boulevard Streetcar Corridor Captures			
	Office	Retail	Residential
Total Corridor	631,871	156,752	2,218

Beatties Ford Road Corridor

While enjoying proximity to Center City, the presence of Johnson C. Smith University, and access to two interstates, development captures for the Beatties Ford Road Corridor are more challenging than for either Central or Wilkinson. The primary issues at hand surround the lack of developable properties throughout much of the corridor, as much of the corridor has narrow parcel depths and is single-family residential in character.

The two exceptions to this are largely found around the two interstates, with strongest opportunities existing between 5 Points and I-77 and around the I-85 interchange. Like Wilkinson, retail in the corridor is challenging as railroad tracks, freeways, and other uses significantly narrow the areas retail could draw from.

Beatties Ford Road Streetcar Corridor Captures			
	Office	Retail	Residential
Total Corridor	86,310	124,450	944



## CITY OF CHARLOTTE—ESTIMATED DEVELOPMENT POTENTIAL FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

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CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL FOR  
 TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 1  
 Map of Transit Corridors and Activity Centers Examined

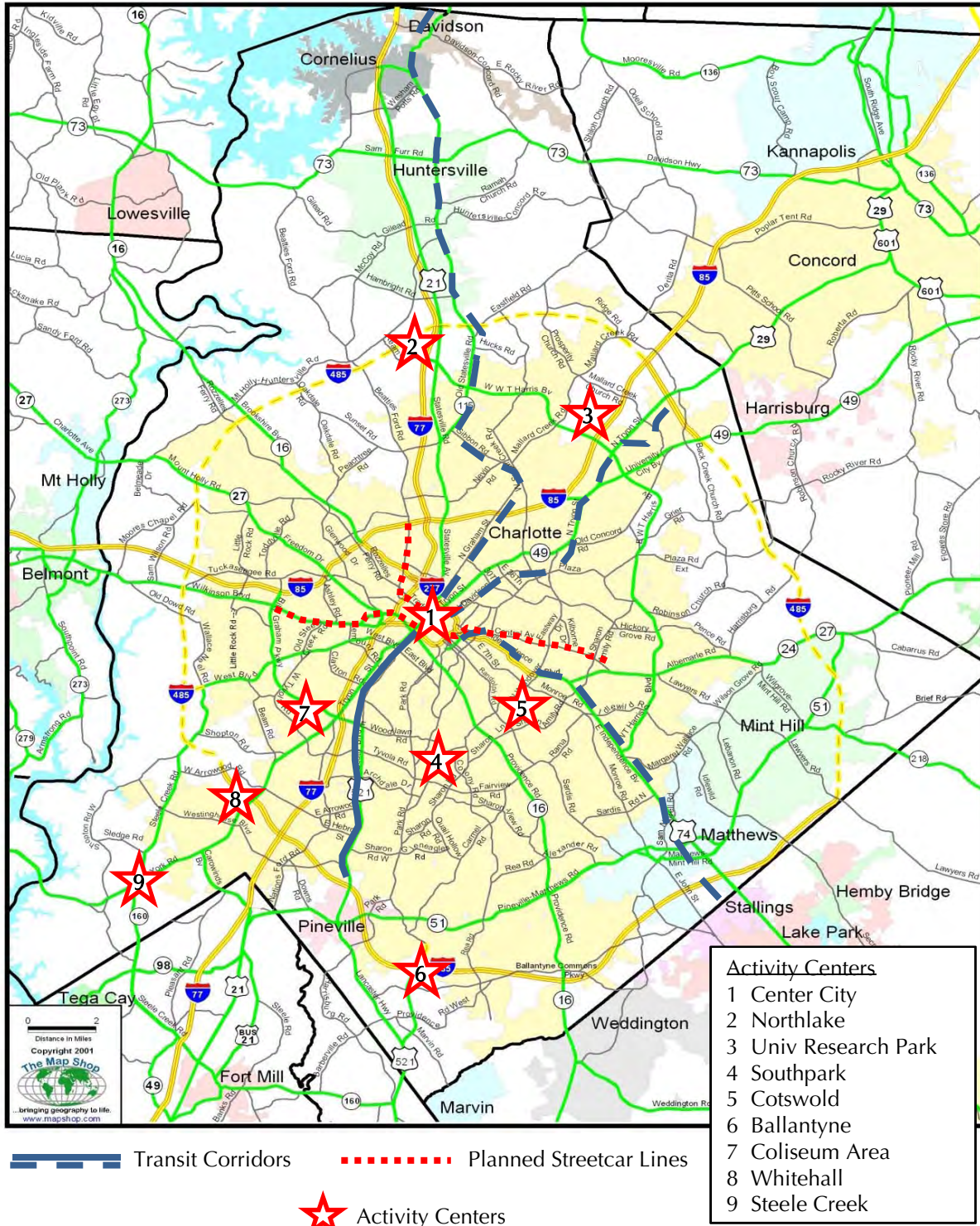
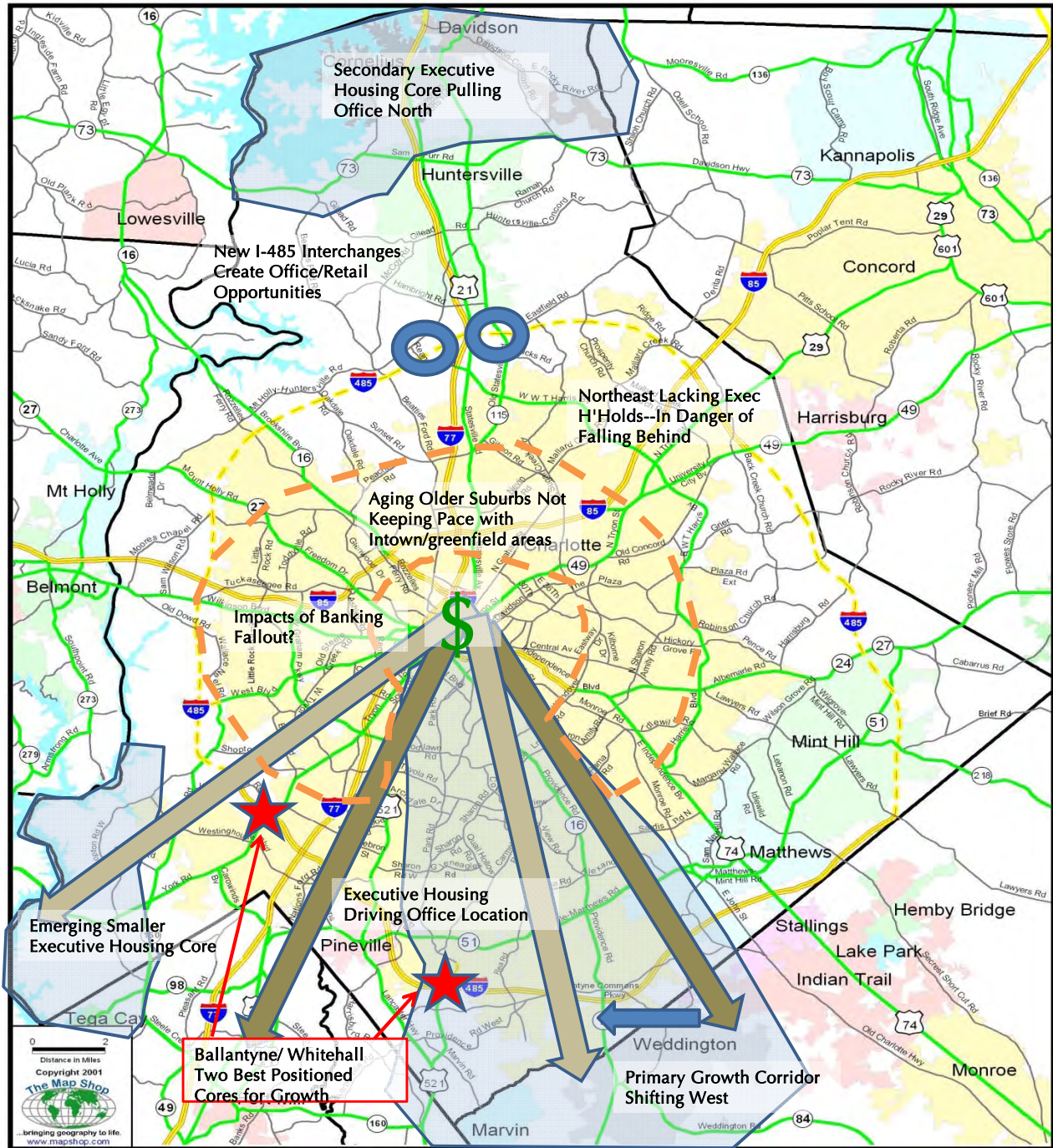




Exhibit 2  
 Summary of Salient Factors Influencing Growth in the Coming Decades



CITY OF CHARLOTTE  
ESTIMATED DEVELOPMENT POTENTIAL  
FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 3  
Summary of Demographic Trends by Area of Mecklenburg County

Area	Total Households		Annual Change		Households <\$35,000		Annual Change		Households >\$150,000		Annual Change		Median HH Income		Annual Change	
	2000	2008	%	#	2000	2008	Change		2000	2008	Change		2000	2008	Change	
Center City (Inside Route 4)	51,145	51,783	0.2%	128	26,376	24,997	-1.0%		3,099	3,910	5.2%		\$33,962	\$36,685	1.6%	
Fair Share				<b>0.9%</b>			<b>(13.81)</b>				<b>8.34</b>				<b>0.83</b>	
Inner East	49,381	54,693	2.2%	1,062	7,792	8,972	3.0%		310	374	4.1%		\$39,518	\$39,350	-0.1%	
Fair Share				<b>7.4%</b>			<b>1.42</b>				<b>0.08</b>				<b>(0.04)</b>	
Inner Northeast	30,444	31,463	0.7%	204	13,222	13,721	0.8%		242	254	1.0%		\$40,043	\$39,805	-0.1%	
Fair Share				<b>1.4%</b>			<b>3.13</b>				<b>0.08</b>				<b>(0.06)</b>	
Inner Southwest	14,639	16,477	2.5%	368	5,645	6,287	2.3%		254	320	5.2%		\$42,583	\$42,993	0.2%	
Fair Share				<b>2.5%</b>			<b>2.23</b>				<b>0.24</b>				<b>0.10</b>	
Inner South	42,785	44,950	1.0%	433	9,601	9,334	-0.6%		6,652	7,791	3.4%		\$67,817	\$70,956	0.9%	
Fair Share				<b>3.0%</b>			<b>(0.79)</b>				<b>3.45</b>				<b>0.48</b>	
Outer East	19,965	26,536	6.6%	1,314	4,868	6,244	5.7%		649	1,014	11.2%		\$57,028	\$58,162	0.4%	
Fair Share				<b>9.1%</b>			<b>1.34</b>				<b>0.36</b>				<b>0.21</b>	
Outer Northeast	23,707	40,339	14.0%	3,326	9,066	14,155	11.2%		1,379	3,315	28.1%		\$61,606	\$66,384	1.6%	
Fair Share				<b>23.0%</b>			<b>1.95</b>				<b>0.76</b>				<b>0.80</b>	
North	18,287	30,048	12.9%	2,352	3,719	5,241	8.2%		2,380	4,843	20.7%		\$73,042	\$80,081	1.9%	
Fair Share				<b>16.3%</b>			<b>0.83</b>				<b>1.37</b>				<b>0.99</b>	
Outer Southwest	9,457	14,975	11.7%	1,104	2,197	3,292	10.0%		476	835	15.1%		\$58,722	\$60,870	0.7%	
Fair Share				<b>7.6%</b>			<b>1.27</b>				<b>0.43</b>				<b>0.38</b>	
Outer South	26,201	40,724	11.1%	2,905	4,235	5,551	6.2%		3,795	6,927	16.5%		\$74,971	\$82,680	2.1%	
Fair Share				<b>20.1%</b>			<b>0.58</b>				<b>1.41</b>				<b>1.06</b>	
Mecklenburg County	273,416	345,639	5.3%	14,445	90,036	101,342	2.5%		19,790	30,798	11.1%		\$50,873	\$55,803	1.9%	

Summary Inner-ring suburbs, with the exception of the Inner South, are falling behind in terms of income growth and ability to attract executive households and are increasingly home to the area's lower-income households.

Area	Total Households		Annual Change		Households <\$35,000		Annual Change		Households >\$150,000		Annual Change		Median HH Income		Annual Change	
	2000	2008	%	#	2000	2008	Change		2000	2008	Change		2000	2008	Change	
Inner City	51,145	51,783		128	26,376	24,997	<b>(13.81)</b>		3,099	3,910	<b>8.34</b>		33,962	36,685	<b>0.55</b>	
Inner Suburbs (less South)	94,464	102,633		1,634	26,659	28,980	<b>1.81</b>		806	948	<b>0.11</b>		40,162	40,074	<b>(0.02)</b>	
Inner South	42,785	44,950		433	9,601	9,334	<b>(0.79)</b>		6,652	7,791	<b>3.45</b>		67,817	70,956	<b>0.64</b>	
Greenfield Suburbs	97,617	152,622		11,002	24,085	34,483	<b>1.21</b>		8,679	16,934	<b>0.98</b>		66,120	71,458	<b>1.08</b>	

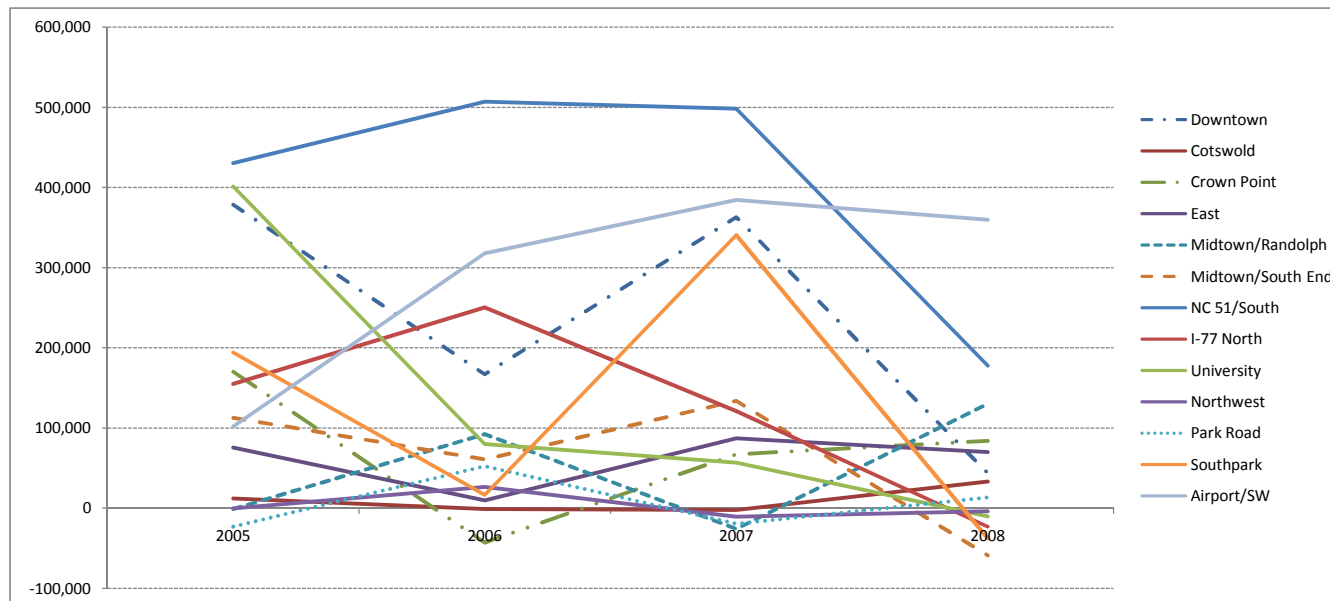
Source: Claritas, Inc. and Noell Consulting Group



**CITY OF CHARLOTTE  
ESTIMATED DEVELOPMENT POTENTIAL  
FOR TRANSIT CORRIDORS & ACTIVITY CENTERS**

**Exhibit 4  
Historic Office Absorption by Submarket, Mecklenburg County**

	YE 2004				Average Rents			Annual Absorption				Total	Share	Fair Share
	Total Space	Vacancy	Occupied	Share	2005	2008	Annual Change	2005	2006	2007	2008			
Downtown	14,306,340	9.2%	12,990,157	37.7%	\$20.27	\$28.85	10.6%	378,668	166,980	362,963	43,606	952,217	15.1%	0.40
Cotswold	274,112	10.3%	245,878	0.7%	\$14.19	\$21.84	13.5%	11,910	-990	-2,292	33,204	41,832	0.7%	0.93
Crown Point	891,401	23.0%	686,379	2.0%	\$16.65	\$16.93	0.4%	170,059	-42,816	67,027	83,966	278,236	4.4%	2.21
East	1,256,318	23.4%	962,340	2.8%	\$13.98	\$14.43	0.8%	75,429	9,798	87,161	69,822	242,210	3.8%	1.37
Midtown/Randolph	2,443,104	6.2%	2,292,576	6.7%	\$19.23	\$24.37	6.7%	-944	92,084	-25,799	130,113	195,454	3.1%	0.46
Midtown/South End	3,842,253	13.1%	3,337,432	9.7%	\$17.85	\$21.47	5.1%	112,911	60,867	133,991	-58,804	248,965	3.9%	0.41
NC 51/South	3,599,256	21.8%	2,814,618	8.2%	\$19.93	\$21.40	1.8%	430,453	507,054	498,127	177,968	1,613,602	25.5%	3.12
I-77 North	3,379,387	21.2%	2,663,421	7.7%	\$19.03	\$20.38	1.8%	154,988	250,269	121,046	-23,083	503,220	8.0%	1.03
University	4,294,893	27.6%	3,109,503	9.0%	\$17.09	\$17.59	0.7%	401,160	80,040	56,780	-10,088	527,892	8.4%	0.92
Northwest	468,160	15.5%	395,694	1.1%	\$14.19	\$13.54	-1.1%	-99	26,547	-10,605	-3,942	11,901	0.2%	0.16
Park Road	690,203	16.7%	574,939	1.7%	\$15.67	\$18.64	4.7%	-23,046	52,544	-19,564	13,411	23,345	0.4%	0.22
Southpark	3,755,187	15.0%	3,191,909	9.3%	\$20.44	\$23.13	3.3%	194,110	16,458	340,648	-37,708	513,508	8.1%	0.88
Airport/SW	1,515,377	24.1%	1,150,171	3.3%	\$16.20	\$16.56	0.6%	101,876	318,015	384,748	359,860	1,164,499	18.4%	5.52
<b>Totals</b>	<b>40,715,991</b>	<b>15.5%</b>	<b>34,415,016</b>		<b>\$19.00</b>	<b>\$23.57</b>	<b>6.0%</b>	<b>2,007,475</b>	<b>1,536,850</b>	<b>1,994,231</b>	<b>778,325</b>	<b>6,316,881</b>		



Source: Colliers Pinkard; CoStar; Noell Consulting Group





CITY OF CHARLOTTE  
ESTIMATED DEVELOPMENT POTENTIAL  
FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 5  
Summary of Key Activity Centers in Mecklenburg County

	Center City	Southpark	Cotswold	Ballantyne	Whitehall
<b>Key Strengths</b>	Highly accessible via freeway and transit, High profile anchors, significant residential growth	Epicenter of executive housing, luxury retail, new housing in core	Quality retail, highly stable and attractive neighborhoods, proximity to center city	Entirety of core under one ownership, fastest growing core in region, great exec housing access	Great regional access, able to play off Coliseum & Ballantyne, exec housing in SW Meck
<b>Key Challenges</b>	Parking costs, land costs, resulting higher rents, future of banks in doubt	Poor interstate access, limited land supply, lack of transit access	Very limited access, not recognized as office core, lack available land	Lack of housing and center in core, not walkable at all, limited transit access	Not walkable, lack of upper-end housing nearby, retail quality questionable long-term
<b>Estimated Office Growth 2000 - 2007</b>	1,911,680	632,773	84,148	2,713,749	1,127,298
<b>% Capture</b>	14.9%	4.0%	0.5%	16.9%	7.0%
<b>Office Absorption, 2004 - 2008</b>	952,217	513,508	41,832	1,613,602	992,438
<b>Capture</b>	15.1%	8.1%	0.7%	25.5%	15.7%
<b>Estimated Vacant Acres</b>	180	70	5	83	311
<b>Dense Housing Growth in Core, 2000 - 2007</b>	2,838	931	63	1,858	965
<b>Household Growth w/in Drive-Time</b>	1,183	413	515	4,073	3,625
<b>Executive Households</b>	5,499	9,670	9,244	10,853	5,718
<b>Exec HHs as % of Total HHs</b>	5%	14%	11%	14%	7%
<b>Office Assessment</b>	Transit access and greater housing/retail bode well, but future of banks a major concern	Will remain strong & strengthening core, but lack of land and access will cap growth potential	Very limited potential given lack of land, access issues	Strongest location in market. Likely to strengthen--creating walkable core w/ dynamic retail important to long-term	Poised to continue growth & attract tenants from I-77 & Coliseum area. Housing and retail need upgrading over time.
<b>Residential Assessment</b>	Land prices may temper growth, which will increasingly go to nearby areas. Greater sense of neighborhood needs to be created in core	Highly attractive for residential growth going forward, although price points a major concern that will temper growth	Attractive for residential intensification, although land supply limited.	Residential needed in core as area matures. Walkability a constraint that must be addressed.	Short-term residential prospects solid, although higher-end housing may be limited. If not well implemented, area residential could be a challenge over time.

Note:

Office absorption figures from Colliers Pinkard. Ballantyne represents South/51 submarket, Northlake represents I-77 North; and University Research Park represents University/NE



CITY OF CHARLOTTE  
ESTIMATED DEVELOPMENT POTENTIAL  
FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 5  
Summary of Key Activity Centers in Mecklenburg County

	Steele Creek	Coliseum Area	Northlake	University Research Park
<b>Key Strengths</b>	Proximity to emerging executive housing, well executed retail in core area	Relatively close-in core, proximity to airport, strong tenant role.	Great interstate access, new mall & retail, access to northern executive households	Large scale users, only major large-scale campus park, abundant retail nearby, green areas
<b>Key Challenges</b>	Interstate access very limited, not considered corporate address, access to region's exec housing limited, not walkable	Poor quality of surrounding housing, lack of existing support services, aging and losing momentum to Whitehall.	Not at all walkable, competition along I-77 to north	Not walkable, lacks any sense of core, aging office product in some locales, lack of transit service
<b>Estimated Office Growth 2000 - 2007</b>	13,395	266,462	273,566	1,911,680
<b>% Capture</b>	0.1%	1.7%	1.7%	11.9%
<b>Office Absorption, 2004 - 2008</b>	8,111	163,950	503,220	527,892
<b>Capture</b>	0.1%	2.6%	8.0%	8.4%
<b>Estimated Vacant Acres</b>	327	563	371	761
<b>Dense Housing Growth in Core, 2000 - 2008</b>	1,056	640	841	1,457
<b>Household Growth w/in Drive-Time</b>	1,647	860	4,756	3,998
<b>Executive Households</b>	1,613	2,715	5,571	3,949
<b>Exec HHs as % of Total HHs</b>	7%	5%	6%	6%
<b>Office Assessment</b>	Likely to be very limited core. Mostly local-serving users	In spite of City Park, likely to continue losing market share to Whitehall & other cores	Will continue to see growth, but will compete w/ Bryton and interchanges to the north.	Will need to diversify and generate town center/core. Lack of executive housing likely means greater attraction to back office users.
<b>Residential Assessment</b>	Relatively limited, although opportunity exists to create strong neighborhood core.	CityPark will help spur residential growth and additional infill can continue. Lack of quality for-sale housing a significant question long-term	Moderately-priced for-sale product and rental should be in demand for quite some time to come. Redevelopment may be tough over time.	Abundant land for residential and need to create vibrant center should spur development. Forested feel could create higher-end opportunities.

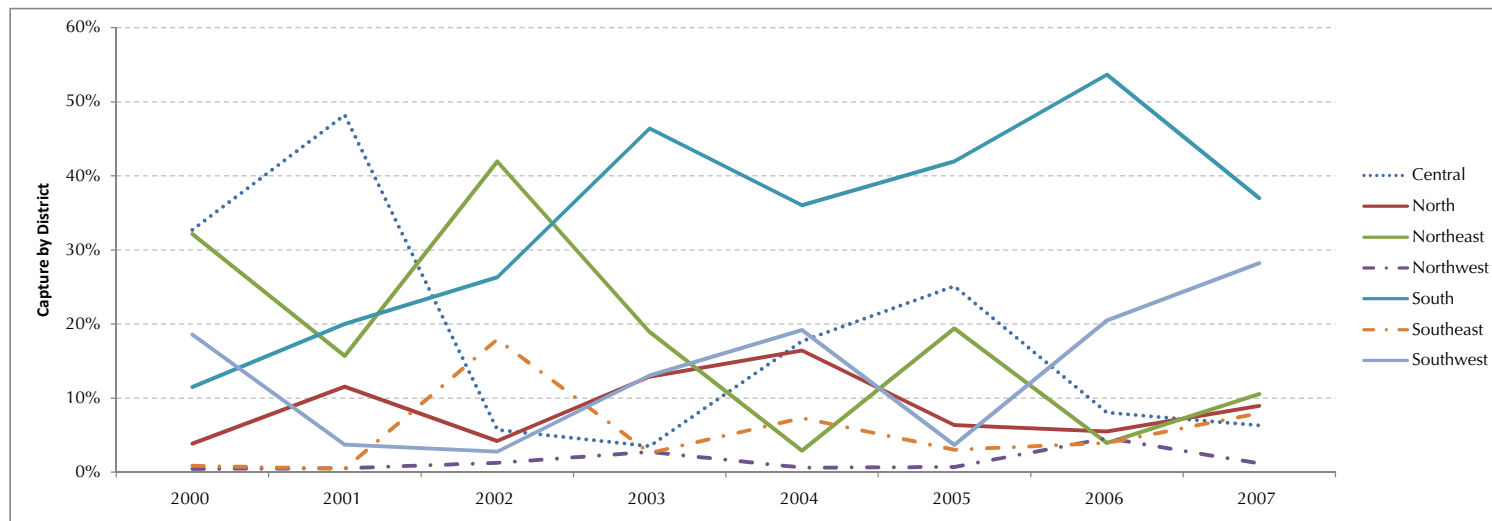
Note:  
Office absorption figures from Colliers Pinkard. Ballantyne represents South/51 submarket, Northlake represents I-77 North; and University Research Park represents University/NE





**Exhibit 6**  
**Office Space Delivered by District, 2000 - 2007**

District	Office Development by Year								
	2000	2001	2002	2003	2004	2005	2006	2007	Totals
<b>Central Totals</b>	<b>1,384,641</b>	<b>1,354,848</b>	<b>52,810</b>	<b>52,655</b>	<b>229,157</b>	<b>442,803</b>	<b>133,321</b>	<b>113,648</b>	<b>3,763,883</b>
Central Capture	32.7%	48.2%	5.7%	3.5%	17.6%	25.1%	8.0%	6.3%	23.5%
<b>North Totals</b>	<b>162,650</b>	<b>324,399</b>	<b>38,695</b>	<b>193,776</b>	<b>213,209</b>	<b>111,768</b>	<b>91,036</b>	<b>161,474</b>	<b>1,297,007</b>
North Capture	3.8%	11.5%	4.2%	12.9%	16.4%	6.3%	5.5%	8.9%	8.1%
<b>Northeast Totals</b>	<b>1,359,558</b>	<b>439,988</b>	<b>388,392</b>	<b>283,841</b>	<b>37,249</b>	<b>342,182</b>	<b>64,936</b>	<b>189,598</b>	<b>3,105,744</b>
Northeast Capture	32.1%	15.6%	41.9%	18.9%	2.9%	19.4%	3.9%	10.5%	19.4%
<b>Northwest Totals</b>	<b>18,251</b>	<b>14,708</b>	<b>11,458</b>	<b>41,208</b>	<b>7,732</b>	<b>11,914</b>	<b>76,428</b>	<b>21,230</b>	<b>202,929</b>
Northwest Capture	0.4%	0.5%	1.2%	2.7%	0.6%	0.7%	4.6%	1.2%	1.3%
<b>South Totals</b>	<b>486,444</b>	<b>562,562</b>	<b>243,804</b>	<b>697,552</b>	<b>467,621</b>	<b>740,367</b>	<b>892,429</b>	<b>666,973</b>	<b>4,757,752</b>
South Capture	11.5%	20.0%	26.3%	46.4%	36.0%	41.9%	53.6%	37.0%	29.7%
<b>Southeast Totals</b>	<b>37,558</b>	<b>12,292</b>	<b>166,240</b>	<b>38,830</b>	<b>94,892</b>	<b>53,388</b>	<b>65,344</b>	<b>143,246</b>	<b>611,790</b>
Southeast Capture	0.9%	0.4%	17.9%	2.6%	7.3%	3.0%	3.9%	7.9%	3.8%
<b>Southwest Totals</b>	<b>785,534</b>	<b>103,228</b>	<b>25,364</b>	<b>195,940</b>	<b>248,641</b>	<b>64,042</b>	<b>340,346</b>	<b>508,443</b>	<b>2,271,538</b>
Southwest Capture	18.6%	3.7%	2.7%	13.0%	19.1%	3.6%	20.5%	28.2%	14.2%
<b>Total</b>	<b>4,234,636</b>	<b>2,812,025</b>	<b>926,763</b>	<b>1,503,802</b>	<b>1,298,501</b>	<b>1,766,464</b>	<b>1,663,840</b>	<b>1,804,612</b>	<b>16,010,643</b>



CITY OF CHARLOTTE  
ESTIMATED DEVELOPMENT POTENTIAL  
FOR TRANSIT CORRIDORS & ACTIVITY CENTERS



Exhibit 7  
Office Space Delivered by Activity Center, 2000 - 2007

Corridor	Office Development by Year								Totals
	2000	2001	2002	2003	2004	2005	2006	2007	
Northlake Totals	-	136,783	-	-	-	136,783	-	-	<b>273,566</b>
Northlake Capture	0.0%	4.9%	0.0%	0.0%	0.0%	7.7%	0.0%	0.0%	<b>1.7%</b>
Univ Res Park Totals	1,180,022	244,760	354,692	188,520	24,782	-	11,616	93,079	<b>2,097,471</b>
Univ Res Park Capture	27.9%	8.7%	38.3%	12.5%	1.9%	0.0%	0.7%	5.2%	<b>13.1%</b>
Downtown Totals	1,151,225	1,150,203	-	5,096	24,954	-	200,283	156,326	<b>2,688,087</b>
Downtown Capture	27.2%	40.9%	0.0%	0.3%	1.9%	0.0%	12.0%	8.7%	<b>16.8%</b>
Southpark Totals	-	-	58,642	52,019	-	362,696	150,112	9,304	<b>632,773</b>
Southpark Capture	0.0%	0.0%	6.3%	3.5%	0.0%	20.5%	9.0%	0.5%	<b>4.0%</b>
Cotswold Totals	6,788	-	-	-	-	-	-	77,360	<b>84,148</b>
Cotswold Capture	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.3%	<b>0.5%</b>
Ballantyne Totals	240,450	309,765	134,736	533,357	340,498	158,922	582,318	413,703	<b>2,713,749</b>
Ballantyne Capture	5.7%	11.0%	14.5%	35.5%	26.2%	9.0%	35.0%	22.9%	<b>16.9%</b>
Coliseum Totals	19,736	115,557	-	-	-	115,856	15,313	-	<b>266,462</b>
Coliseum Capture	0.5%	4.1%	0.0%	0.0%	0.0%	6.6%	0.9%	0.0%	<b>1.7%</b>
Whitehall Totals	730,524	65,700	-	130,314	187,034	7,150	212,263	501,629	<b>1,834,614</b>
Whitehall Capture	17.3%	2.3%	0.0%	8.7%	14.4%	0.4%	12.8%	27.8%	<b>11.5%</b>
Steele Creek Totals	-	6,906	-	-	672	-	4,275	1,542	<b>13,395</b>
Steele Creek Capture	0.0%	0.2%	0.0%	0.0%	0.1%	0.0%	0.3%	0.1%	<b>0.1%</b>
<b>Mecklenburg County Totals</b>	<b>4,234,636</b>	<b>2,812,025</b>	<b>926,763</b>	<b>1,503,802</b>	<b>1,298,501</b>	<b>1,766,464</b>	<b>1,663,840</b>	<b>1,804,612</b>	<b>16,010,643</b>
<b>Activity Centers Combined</b>	<b>3,328,745</b>	<b>2,029,674</b>	<b>548,070</b>	<b>909,306</b>	<b>577,940</b>	<b>781,407</b>	<b>1,176,180</b>	<b>1,252,943</b>	<b>10,604,265</b>
<b>Captures Combined</b>	<b>78.6%</b>	<b>72.2%</b>	<b>59.1%</b>	<b>60.5%</b>	<b>44.5%</b>	<b>44.2%</b>	<b>70.7%</b>	<b>69.4%</b>	<b>66.2%</b>

SOURCE: Charlotte-Mecklenburg Planning Department, Noell Consulting Group



CITY OF CHARLOTTE  
ESTIMATED DEVELOPMENT POTENTIAL  
FOR TRANSITY CORRIDORS & ACTIVITY CENTERS



Exhibit 8  
Office Space Delivered by Corridor, 2000 - 2007

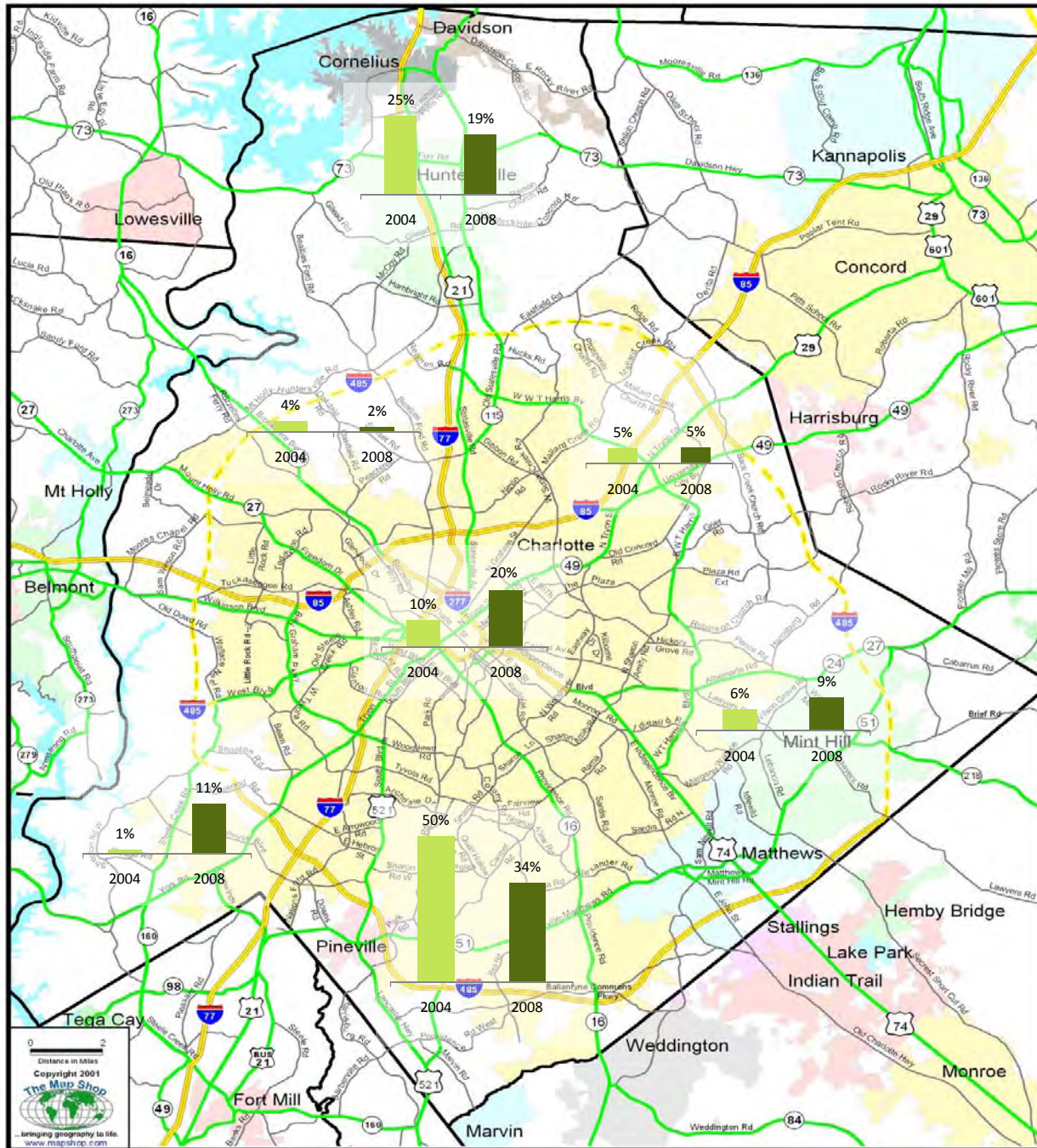
Office Development by Year									
Corridor	2000	2001	2002	2003	2004	2005	2006	2007	Totals
North Corridor Totals	136,380	104,948	14,836	37,661	11,714	40,408	86,205	77,549	509,701
North Corridor Capture	4.4%	4.7%	1.2%	3.2%	0.5%	1.3%	4.5%	5.8%	3.1%
Charlotte Stations	87,316	1,800	-	2,144	-	-	26,670	-	117,930
Town Stations	49,064	103,148	14,836	35,517	11,714	40,408	59,535	77,549	391,771
								<b>Charlotte Stations</b>	<b>23%</b>
								<b>Town Stations</b>	<b>77%</b>
Northeast Corridor Totals	7,068	-	13,960	19,420	1,736	97,913	16,995	21,948	179,040
Northeast Corridor Capture	0.2%	0.0%	1.1%	1.7%	0.1%	3.2%	0.9%	1.6%	1.1%
Intown Split	-	-	-	-	1,736	-	-	-	1,736
Suburban Split	7,068	-	13,960	19,420	-	97,913	16,995	21,948	177,304
								<b>Intown Stations</b>	<b>1%</b>
								<b>Suburban Stations</b>	<b>99%</b>
Southeast Corridor Totals	30,590	22,227	10,354	6,062	105,391	44,300	65,344	24,417	308,685
Southeast Corridor Capture	1.0%	1.0%	0.8%	0.5%	4.3%	1.5%	3.4%	1.8%	1.9%
Intown Split	-	20,000	640	-	43,294	-	-	18,075	82,009
Suburban Split	30,590	2,227	9,714	6,062	62,097	44,300	65,344	6,342	226,676
								<b>Intown Stations</b>	<b>27%</b>
								<b>Suburban Stations</b>	<b>73%</b>
South Corridor Totals	136,620	46,166	35,886	9,237	33,342	39,710	15,576	25,668	342,205
South Corridor Capture	4.4%	2.1%	2.9%	0.8%	1.4%	1.3%	0.8%	1.9%	2.1%
Intown Split	133,775	46,166	35,886	-	33,342	34,334	15,576	25,668	324,747
Suburban Split	2,845	-	-	9,237	-	5,376	-	-	17,458
								<b>Intown Stations</b>	<b>95%</b>
								<b>Suburban Stations</b>	<b>5%</b>
Mecklenburg County	3,111,883	2,245,819	1,243,154	1,171,840	2,457,164	3,040,535	1,898,753	1,339,105	16,508,253
Four Corridors	310,658	173,341	75,036	72,380	152,183	222,331	184,120	149,582	1,339,631
Four Corridor Capture	10%	8%	6%	6%	6%	7%	10%	11%	8%
								<b>Intown Stations</b>	<b>30%</b>
								<b>Suburban Stations</b>	<b>70%</b>

SOURCE: Charlotte-Mecklenburg Planning Department, Noell Consulting Group



CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL FOR  
 TRANSIT CORRIDORS & ACTIVITY CENTERS

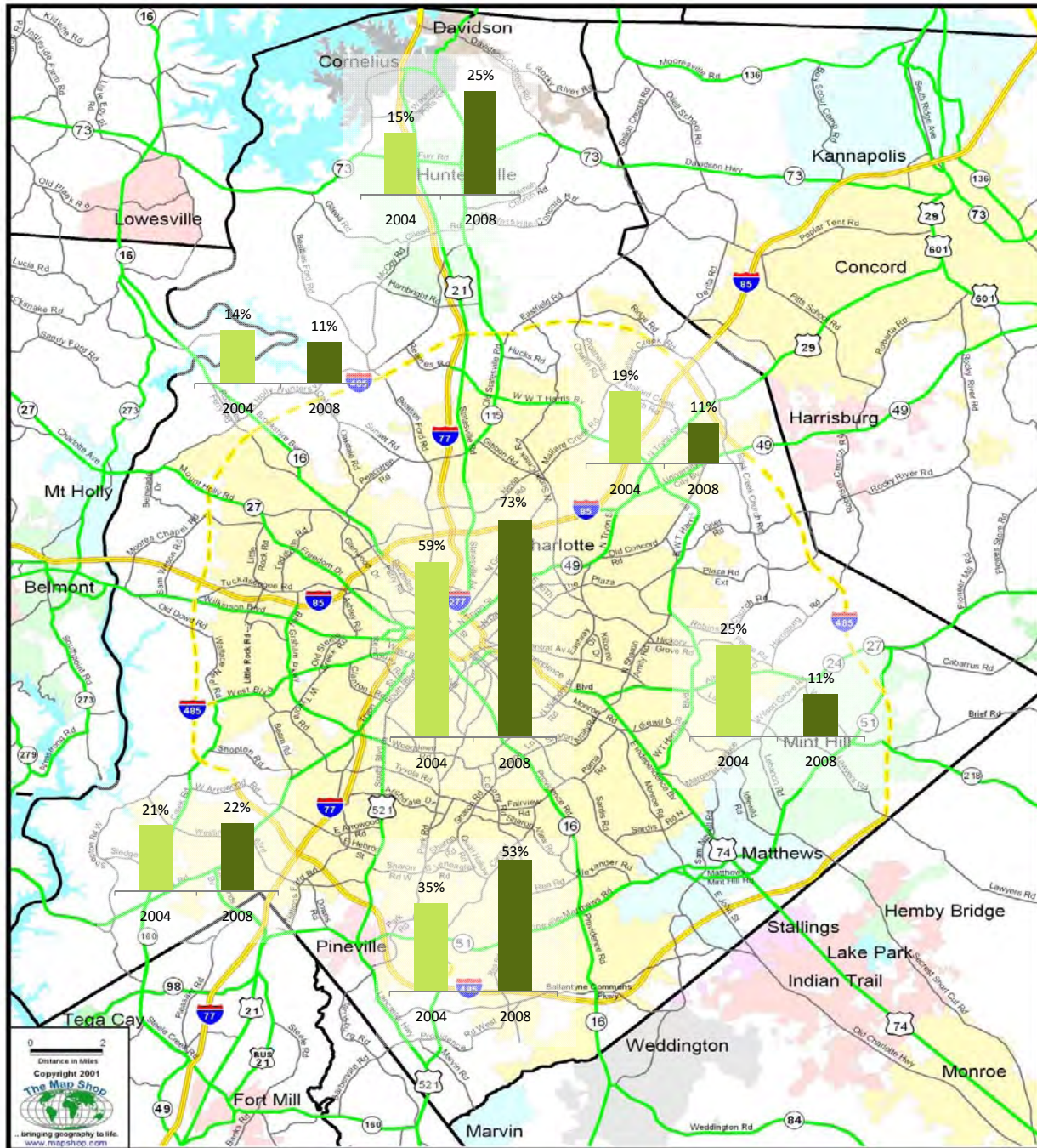
Exhibit 9  
 Share of New Home Sales Above \$300,000 by District, 2004 - 2008





CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL FOR  
 TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 10  
 New Attached Home Sales as a Share of Total New Home Sales by District, 2004 - 2008



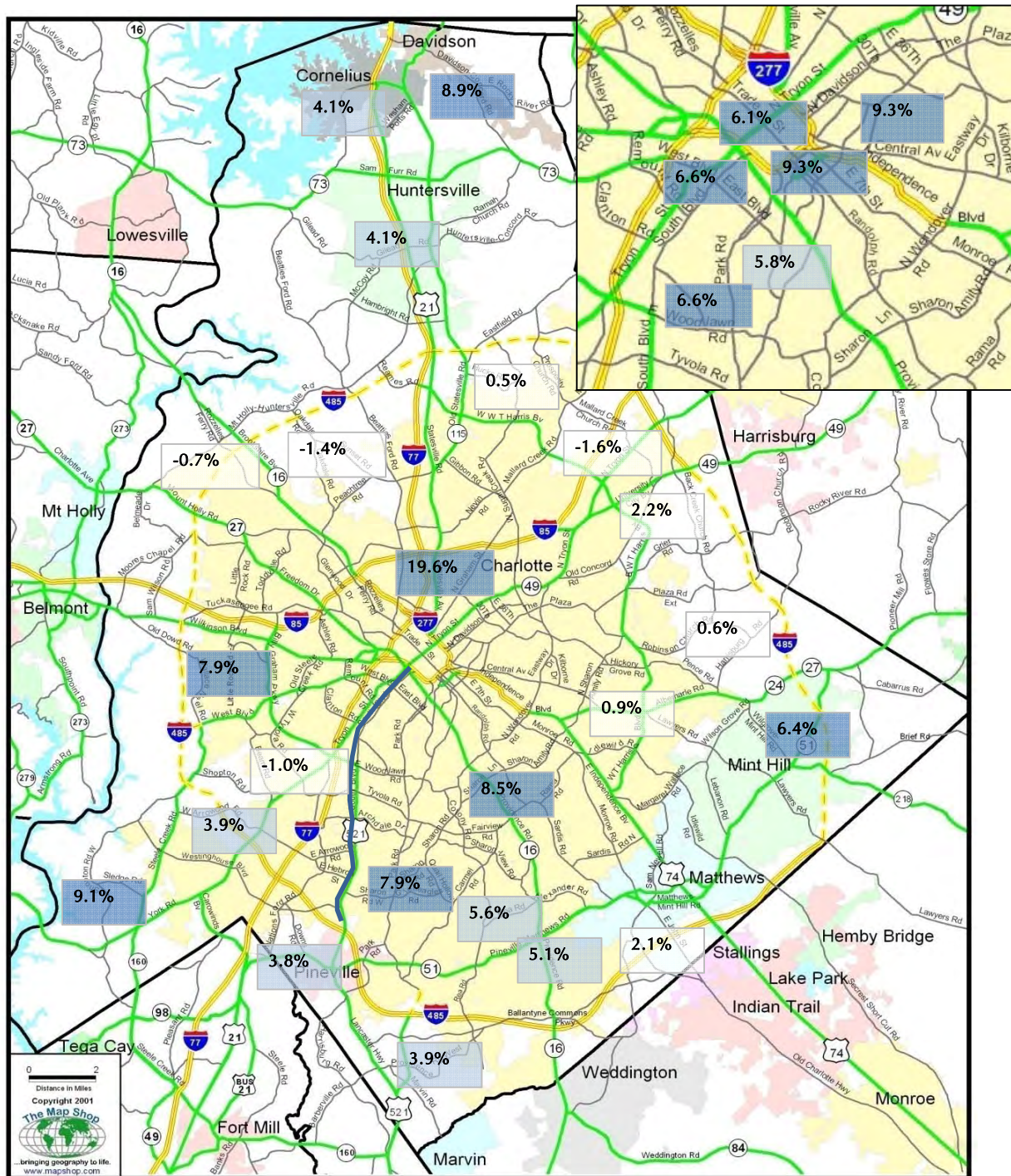
SOURCE: Noell Consulting Group based on data obtained from MORE.





CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL FOR  
 TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 11  
 Map of Average Home Price Increases by ZIP Code, 2003 - 2008



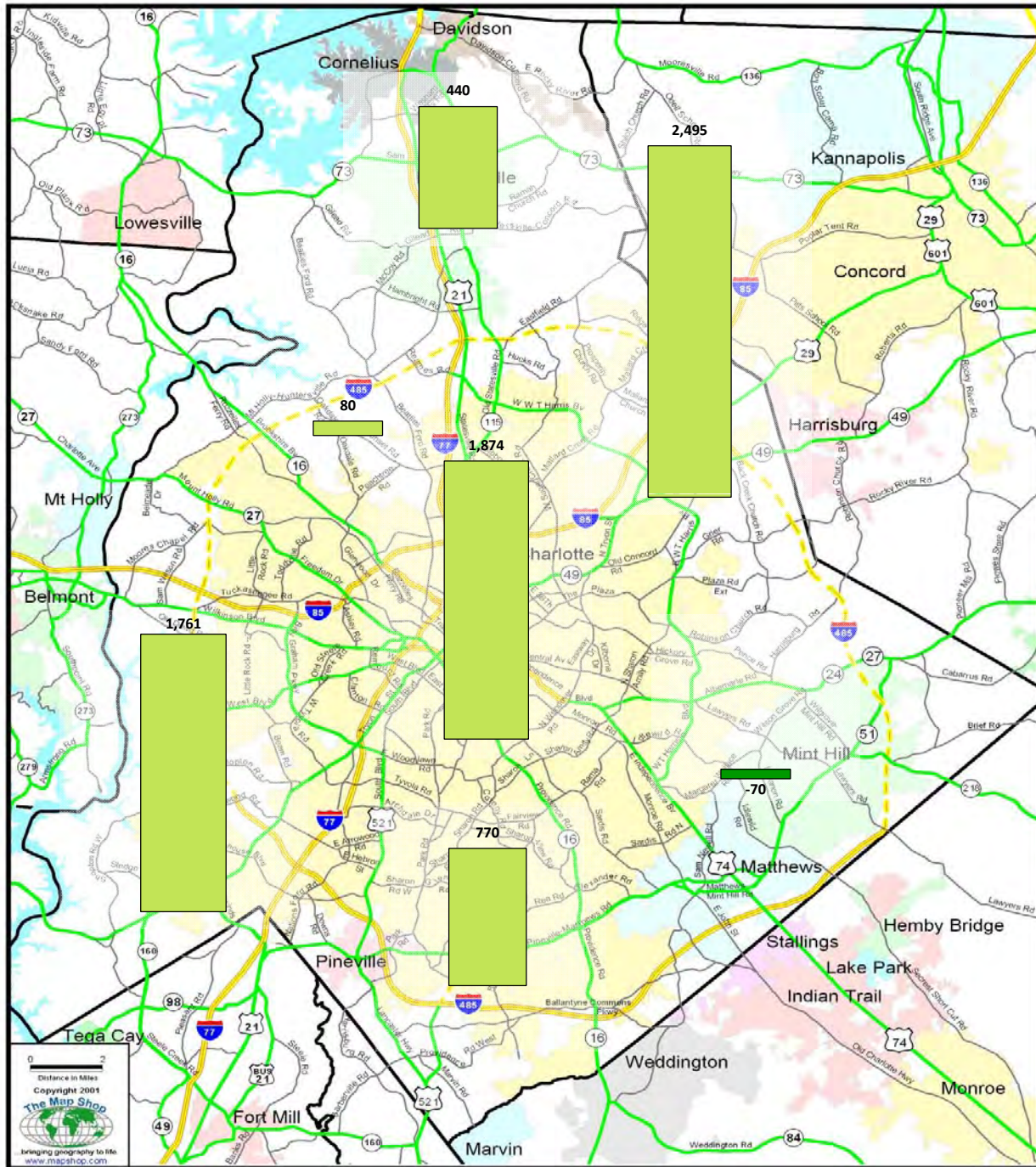
SOURCE: Noell Consulting Group based on data obtained from MORE.





CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL FOR  
 TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 12  
 Share of Rental Apartment Absorption by District, 2004 - 2008



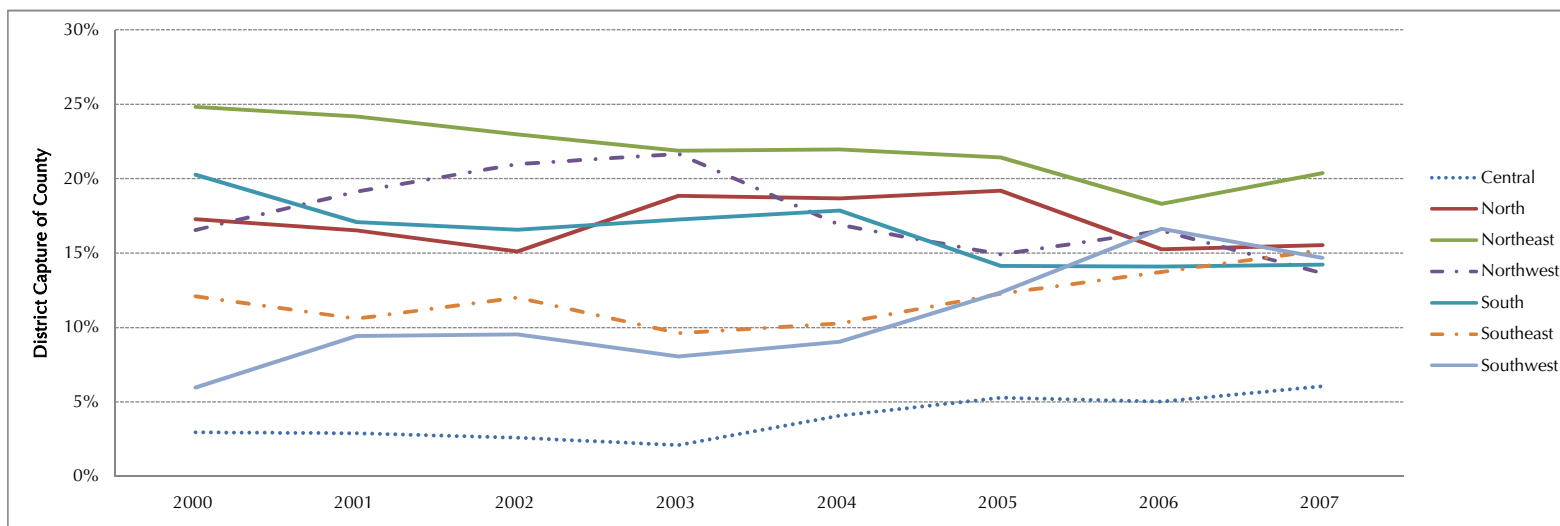
SOURCE: Noell Consulting Group based on Real Data Apartment Index



CITY OF CHARLOTTE  
ESTIMATED DEVELOPMENT POTENTIAL  
FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 13  
Single-Family Units Delivered by District, 2000 - 2007

District	Single-Family Deliveries by Year								
	2000	2001	2002	2003	2004	2005	2006	2007	Totals
<b>Central Totals</b>	<b>235</b>	<b>220</b>	<b>197</b>	<b>151</b>	<b>279</b>	<b>379</b>	<b>420</b>	<b>379</b>	<b>2,260</b>
Central Capture	3.0%	2.9%	2.6%	2.1%	4.1%	5.3%	5.0%	6.1%	3.8%
<b>North Totals</b>	<b>1,365</b>	<b>1,252</b>	<b>1,146</b>	<b>1,350</b>	<b>1,277</b>	<b>1,378</b>	<b>1,273</b>	<b>972</b>	<b>10,013</b>
North Capture	17.3%	16.5%	15.1%	18.8%	18.7%	19.2%	15.3%	15.5%	17.0%
<b>Northeast Totals</b>	<b>1,960</b>	<b>1,833</b>	<b>1,744</b>	<b>1,568</b>	<b>1,502</b>	<b>1,539</b>	<b>1,528</b>	<b>1,274</b>	<b>12,948</b>
Northeast Capture	24.8%	24.2%	23.0%	21.9%	22.0%	21.4%	18.3%	20.4%	22.0%
<b>Northwest Totals</b>	<b>1,306</b>	<b>1,450</b>	<b>1,593</b>	<b>1,553</b>	<b>1,155</b>	<b>1,070</b>	<b>1,377</b>	<b>853</b>	<b>10,357</b>
Northwest Capture	16.5%	19.1%	21.0%	21.7%	16.9%	14.9%	16.5%	13.6%	17.6%
<b>South Totals</b>	<b>1,600</b>	<b>1,294</b>	<b>1,256</b>	<b>1,236</b>	<b>1,221</b>	<b>1,014</b>	<b>1,175</b>	<b>889</b>	<b>9,685</b>
South Capture	20.3%	17.1%	16.6%	17.2%	17.9%	14.1%	14.1%	14.2%	16.5%
<b>Southeast Totals</b>	<b>956</b>	<b>803</b>	<b>912</b>	<b>690</b>	<b>702</b>	<b>882</b>	<b>1,146</b>	<b>952</b>	<b>7,043</b>
Southeast Capture	12.1%	10.6%	12.0%	9.6%	10.3%	12.3%	13.7%	15.2%	12.0%
<b>Southwest Totals</b>	<b>472</b>	<b>715</b>	<b>724</b>	<b>577</b>	<b>619</b>	<b>887</b>	<b>1,388</b>	<b>918</b>	<b>6,300</b>
Southwest Capture	6.0%	9.4%	9.5%	8.1%	9.1%	12.4%	16.6%	14.7%	10.7%
<b>Total</b>	<b>7,898</b>	<b>7,582</b>	<b>7,589</b>	<b>7,166</b>	<b>6,839</b>	<b>7,181</b>	<b>8,343</b>	<b>6,256</b>	<b>58,854</b>



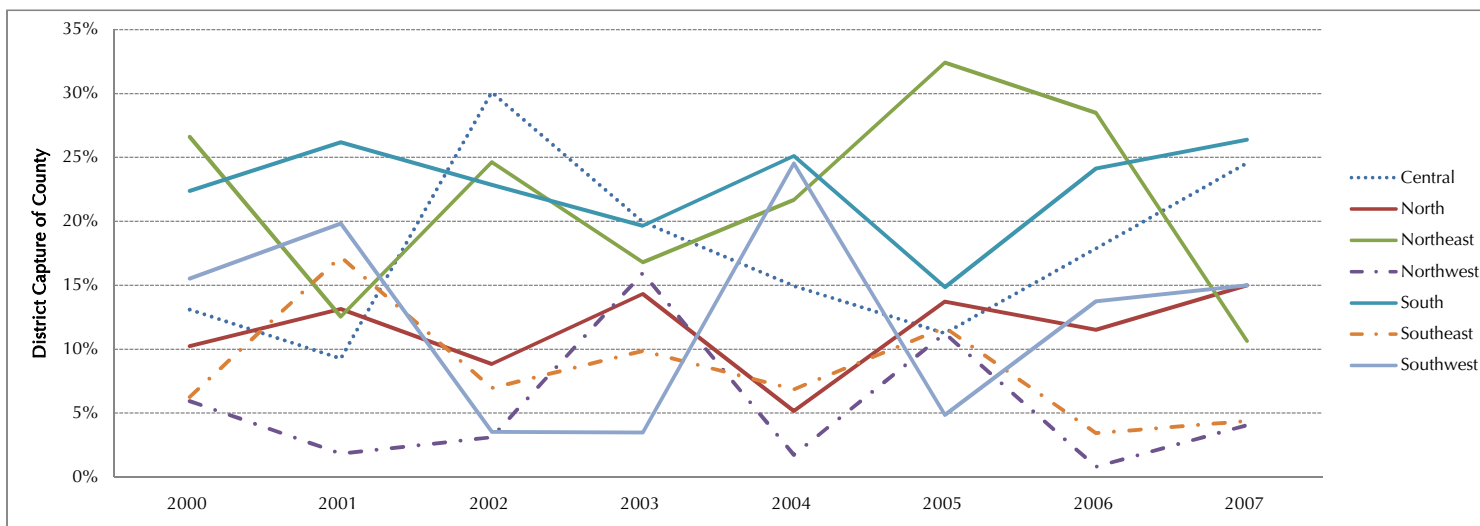
Source: Noell Consulting Group based on data obtained from the Charlotte-Mecklenburg Planning Department



CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 13  
 Multifamily Units Delivered by District, 2000 - 2007

District	Multifamily Deliveries by Year								
	2000	2001	2002	2003	2004	2005	2006	2007	Totals
<b>Central Totals</b>	<b>835</b>	<b>482</b>	<b>1,873</b>	<b>755</b>	<b>658</b>	<b>495</b>	<b>972</b>	<b>1,522</b>	<b>7,592</b>
Central Capture	13.1%	9.3%	30.1%	20.0%	15.0%	11.2%	17.9%	24.6%	18.1%
<b>North Totals</b>	<b>653</b>	<b>684</b>	<b>550</b>	<b>542</b>	<b>227</b>	<b>605</b>	<b>627</b>	<b>930</b>	<b>4,818</b>
North Capture	10.2%	13.1%	8.8%	14.3%	5.2%	13.7%	11.5%	15.0%	11.5%
<b>Northeast Totals</b>	<b>1,697</b>	<b>653</b>	<b>1,534</b>	<b>636</b>	<b>954</b>	<b>1,428</b>	<b>1,549</b>	<b>660</b>	<b>9,111</b>
Northeast Capture	26.6%	12.5%	24.6%	16.8%	21.7%	32.4%	28.5%	10.6%	21.7%
<b>Northwest Totals</b>	<b>379</b>	<b>96</b>	<b>194</b>	<b>603</b>	<b>76</b>	<b>495</b>	<b>44</b>	<b>251</b>	<b>2,138</b>
Northwest Capture	5.9%	1.8%	3.1%	15.9%	1.7%	11.2%	0.8%	4.0%	5.1%
<b>South Totals</b>	<b>1,428</b>	<b>1,362</b>	<b>1,423</b>	<b>743</b>	<b>1,105</b>	<b>654</b>	<b>1,312</b>	<b>1,635</b>	<b>9,662</b>
South Capture	22.4%	26.2%	22.9%	19.6%	25.1%	14.8%	24.1%	26.4%	23.0%
<b>Southeast Totals</b>	<b>399</b>	<b>896</b>	<b>433</b>	<b>373</b>	<b>302</b>	<b>515</b>	<b>187</b>	<b>272</b>	<b>3,377</b>
Southeast Capture	6.3%	17.2%	7.0%	9.9%	6.9%	11.7%	3.4%	4.4%	8.0%
<b>Southwest Totals</b>	<b>990</b>	<b>1,032</b>	<b>220</b>	<b>132</b>	<b>1,079</b>	<b>214</b>	<b>748</b>	<b>929</b>	<b>5,344</b>
Southwest Capture	15.5%	19.8%	3.5%	3.5%	24.5%	4.9%	13.8%	15.0%	12.7%
<b>Total</b>	<b>6,381</b>	<b>5,205</b>	<b>6,227</b>	<b>3,784</b>	<b>4,401</b>	<b>4,406</b>	<b>5,439</b>	<b>6,199</b>	<b>42,042</b>



Source: Noell Consulting Group based on data obtained from the Charlotte-Mecklenburg Planning Department



CITY OF CHARLOTTE  
ESTIMATED DEVELOPMENT POTENTIAL  
FOR TRANSIT CORRIDORS & CENTERS

Exhibit 14  
Single-Family Units Delivered by Activity Center, 2000 - 2007

Corridor	Single-Family Deliveries by Year								Totals
	2000	2001	2002	2003	2004	2005	2006	2007	
Northlake Totals	46	18	10	133	56	133	163	45	604
Northlake Captures	0.6%	0.2%	0.1%	1.9%	0.8%	1.9%	2.0%	0.7%	1.0%
Univ Res Park Totals	273	171	113	76	15	4	36	35	723
Univ Res Park Captures	3.5%	2.3%	1.5%	1.1%	0.2%	0.1%	0.4%	0.6%	1.2%
Center City Totals	12	30	2	-	1	-	4	7	56
Center City Capture	0	0	0	-	0	-	0	0	0
Southpark Totals	2	1	1	4	10	2	4	4	28
Southpark Captures	0.0%	0.0%	0.0%	0.1%	0.1%	0.0%	0.0%	0.1%	0.0%
Cotswold Totals	1	3	1	3	5	15	31	27	86
Cotswold Captures	0.0%	0.0%	0.0%	0.0%	0.1%	0.2%	0.4%	0.4%	0.1%
Ballantyne Totals	178	112	44	74	34	14	8	5	469
Ballantyne Captures	2.3%	1.5%	0.6%	1.0%	0.5%	0.2%	0.1%	0.1%	0.8%
Coliseum Totals	1	2	-	-	1	-	2	-	6
Coliseum Captures	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Whitehall Totals	49	68	-	2	2	-	1	-	122
Whitehall Captures	0.6%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Steele Creek Totals	123	88	161	242	149	250	280	282	1,575
Steele Creek Captures	1.6%	1.2%	2.1%	3.4%	2.2%	3.5%	3.4%	4.5%	2.7%
<b>Mecklenburg County Totals</b>	<b>7,898</b>	<b>7,582</b>	<b>7,589</b>	<b>7,166</b>	<b>6,839</b>	<b>7,181</b>	<b>8,343</b>	<b>6,256</b>	<b>58,854</b>
<b>Totals, Activity Centers</b>	<b>685</b>	<b>493</b>	<b>332</b>	<b>534</b>	<b>273</b>	<b>418</b>	<b>529</b>	<b>405</b>	<b>3,669</b>
<b>Activity Center Capture</b>	<b>8.7%</b>	<b>6.5%</b>	<b>4.4%</b>	<b>7.5%</b>	<b>4.0%</b>	<b>5.8%</b>	<b>6.3%</b>	<b>6.5%</b>	<b>6.2%</b>





CITY OF CHARLOTTE  
ESTIMATED DEVELOPMENT POTENTIAL  
FOR TRANSIT CORRIDORS & CENTERS



Exhibit 14  
Multifamily Units Delivered by Activity Center, 2000 - 2007

Corridor	Multifamily Deliveries by Year								Totals
	2000	2001	2002	2003	2004	2005	2006	2007	
Northlake Totals	89	83	82	342	14	26	1	204	841
Northlake Captures	1.4%	1.6%	1.3%	9.0%	0.3%	0.6%	0.0%	3.3%	2.0%
	23%	86%	42%	57%	18%	5%	2%	81%	39.3%
Univ Res Park Totals	0	328	28	27	299	442	289	44	1,457
Univ Res Park Captures	0.0%	6.3%	0.4%	0.7%	6.8%	10.0%	5.3%	0.7%	3.5%
	0.0%	50.2%	1.8%	4.2%	31.3%	31.0%	18.7%	6.7%	16.0%
Center City Totals	412	212	809	334	117	0	180	774	2,838
Center City Capture	6.5%	4.1%	13.0%	8.8%	2.7%	0.0%	3.3%	12.5%	6.8%
	49.3%	44.0%	43.2%	44.2%	17.8%	0.0%	18.5%	50.9%	37.4%
Southpark Totals	17	0	49	35	23	26	644	137	931
Southpark Captures	0.3%	0.0%	0.8%	0.9%	0.5%	0.6%	11.8%	2.2%	2.2%
	1.2%	0.0%	3.4%	4.7%	2.1%	4.0%	49.1%	8.4%	9.6%
Cotswold Totals	0	0	0	0	0	0	0	63	63
Cotswold Captures	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.1%
	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.9%	0.7%
Ballantyne Totals	83	276	438	113	422	91	142	293	1,858
Ballantyne Captures	1.3%	5.3%	7.0%	3.0%	9.6%	2.1%	2.6%	4.7%	4.4%
	5.8%	20.3%	30.8%	15.2%	38.2%	13.9%	10.8%	17.9%	19.2%
Coliseum Totals	280	0	0	0	280	80	0	0	640
Coliseum Captures	4.4%	0.0%	0.0%	0.0%	6.4%	1.8%	0.0%	0.0%	1.5%
	28.3%	0.0%	0.0%	0.0%	25.9%	37.4%	0.0%	0.0%	12.0%
Whitehall Totals	196	122	0	0	30	55	82	480	965
Whitehall Captures	3.1%	2.3%	0.0%	0.0%	0.7%	1.2%	1.5%	7.7%	2.3%
	19.8%	11.8%	0.0%	0.0%	2.8%	25.7%	11.0%	51.7%	18.1%
Steele Creek Totals	84	39	44	43	33	65	496	252	1,056
Steele Creek Captures	1.3%	0.7%	0.7%	1.1%	0.7%	1.5%	9.1%	4.1%	2.5%
	8.5%	3.8%	20.0%	32.6%	3.1%	30.4%	66.3%	27.1%	19.8%
<b>Mecklenburg County Totals</b>	<b>6,381</b>	<b>5,205</b>	<b>6,227</b>	<b>3,784</b>	<b>4,401</b>	<b>4,406</b>	<b>5,439</b>	<b>6,199</b>	<b>42,042</b>
<b>Totals, Activity Centers</b>	<b>1,161</b>	<b>1,060</b>	<b>1,450</b>	<b>894</b>	<b>1,218</b>	<b>785</b>	<b>1,834</b>	<b>2,247</b>	<b>10,649</b>
<b>Activity Center Capture</b>	<b>18.2%</b>	<b>20.4%</b>	<b>23.3%</b>	<b>23.6%</b>	<b>27.7%</b>	<b>17.8%</b>	<b>33.7%</b>	<b>36.2%</b>	<b>25.3%</b>



CITY OF CHARLOTTE  
ESTIMATED DEVELOPMENT POTENTIAL  
FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 15  
Single-Family Units Delivered by Corridor, 2000 - 2007

Corridor	Single-Family Deliveries by Year								
	2000	2001	2002	2003	2004	2005	2006	2007	Totals
North Corridor Totals	926	820	674	702	695	782	679	615	5,893
North Corridor Capture	11.7%	10.8%	8.9%	9.8%	10.2%	10.9%	8.1%	9.8%	10.0%
Charlotte Stations	499	406	262	197	256	294	292	299	2,505
Town Stations	427	414	412	505	439	488	387	316	3,388
								<b>Charlotte Stations</b>	<b>43.6%</b>
								<b>Town Stations</b>	<b>56.4%</b>
Northeast Corridor Totals	126	80	60	36	61	26	48	69	506
Northeast Corridor Capture	1.6%	1.1%	0.8%	0.5%	0.9%	0.4%	0.6%	1.1%	0.9%
Intown Split	14	13	11	9	8	18	34	57	164
Suburban Split	112	67	49	27	53	8	14	12	342
								<b>Intown Stations</b>	<b>32.4%</b>
								<b>Suburban Stations</b>	<b>67.6%</b>
Southeast Corridor Totals	31	61	109	68	48	52	59	104	532
Southeast Corridor Capture	0.4%	0.8%	1.4%	0.9%	0.7%	0.7%	0.7%	1.7%	0.9%
Intown Split	3	3	1	9	10	3	7	5	41
Suburban Split	28	58	108	59	38	49	52	99	491
								<b>Intown Stations</b>	<b>7.7%</b>
								<b>Suburban Stations</b>	<b>92.3%</b>
South Corridor Totals	9	1	1	6	44	12	40	25	138
South Corridor Capture	0.1%	0.0%	0.0%	0.1%	0.6%	0.2%	0.5%	0.4%	0.2%
Intown Split	3	1	1	2	5	2	6	6	26
Suburban Split	6	-	-	4	39	10	34	19	112
								<b>Intown Stations</b>	<b>18.8%</b>
								<b>Suburban Stations</b>	<b>81.2%</b>
Mecklenburg County	7,898	7,582	7,589	7,166	6,839	7,181	8,343	6,256	58,854
Total, 4 Corridors	1,092	962	844	812	848	872	826	813	7,069
Corridor Captures	14%	13%	11%	11%	12%	12%	10%	13%	12%
								<b>Intown Stations</b>	<b>3%</b>
								<b>Suburban Stations</b>	<b>97%</b>

SOURCE: Charlotte-Mecklenburg Planning Department, Noell Consulting Group





CITY OF CHARLOTTE  
ESTIMATED DEVELOPMENT POTENTIAL  
FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 15  
Multifamily Units Delivered by Corridor, 2000 - 2007

Corridor	Multifamily Deliveries by Year								Totals
	2000	2001	2002	2003	2004	2005	2006	2007	
North Corridor Totals	227	227	268	422	120	284	93	258	1,899
North Corridor Capture	3.6%	4.4%	4.3%	11.2%	2.7%	6.4%	1.7%	4.2%	4.5%
Charlotte Stations	13	99	103	55	41	132	30	48	521
Town Stations	214	128	165	367	79	152	63	210	1,378
								<b>Capture Split</b>	<b>27.4%</b>
								<b>Capture Split</b>	<b>72.6%</b>
Northeast Corridor Totals	539	9	555	134	144	407	828	240	2,856
Northeast Corridor Capture	8.4%	0.2%	8.9%	3.5%	3.3%	9.2%	15.2%	3.9%	6.8%
Intown Split	-	-	108	74	70	48	350	94	744
Suburban Split	539	9	447	60	74	359	478	146	2,112
								<b>Intown Stations</b>	<b>26.1%</b>
								<b>Suburban Stations</b>	<b>73.9%</b>
Southeast Corridor Totals	205	35	214	102	114	152	26	269	1,117
Southeast Corridor Capture	3.2%	0.7%	3.4%	2.7%	2.6%	3.4%	0.5%	4.3%	2.7%
Intown Split	58	20	8	-	41	2	-	231	360
Suburban Split	147	15	206	102	73	150	26	38	757
								<b>Intown Stations</b>	<b>32.2%</b>
								<b>Suburban Stations</b>	<b>67.8%</b>
South Corridor Totals	266	448	496	170	149	66	63	264	1,922
South Corridor Capture	4.2%	8.6%	8.0%	4.5%	3.4%	1.5%	1.2%	4.3%	4.6%
Intown Split	266	-	364	170	149	66	63	72	1,150
Suburban Split	-	448	132	-	-	-	-	192	772
								<b>Intown Stations</b>	<b>59.8%</b>
								<b>Suburban Stations</b>	<b>40.2%</b>
Mecklenburg County	6,381	5,205	6,227	3,784	4,401	4,406	5,439	6,199	42,042
Total, 4 Corridors	1,237	719	1,533	828	527	909	1,010	1,031	7,794
Corridor Captures	19%	14%	25%	22%	12%	21%	19%	17%	19%
								<b>Intown Stations</b>	<b>29%</b>
								<b>Suburban Stations</b>	<b>71%</b>

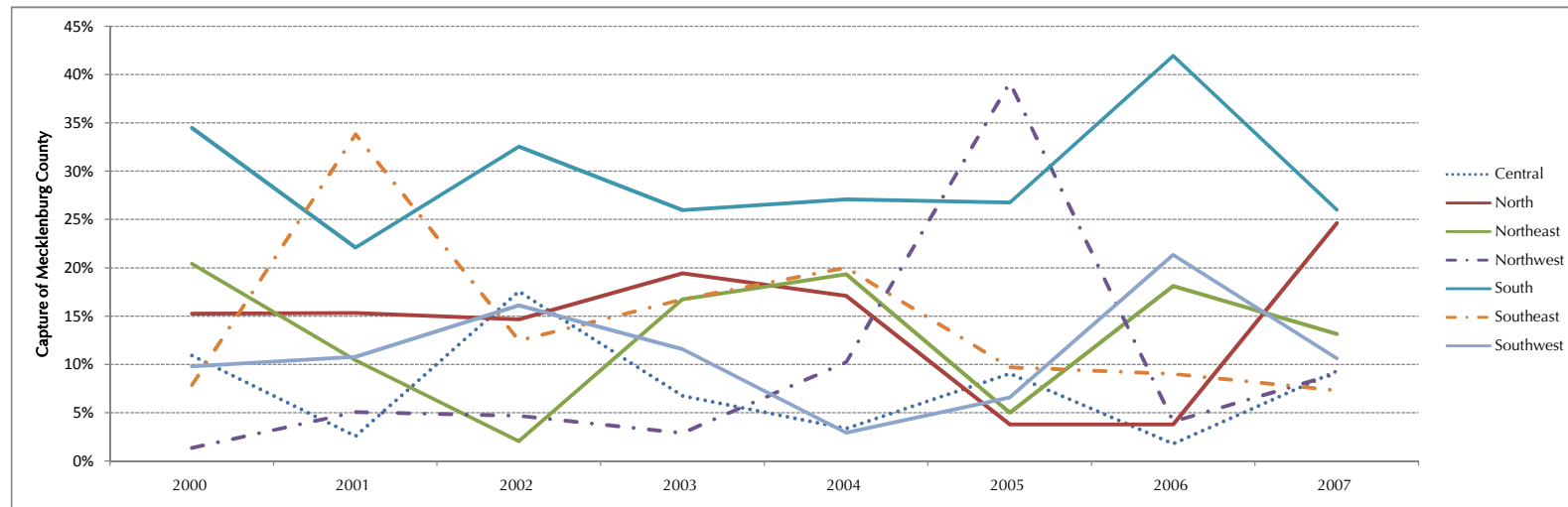
SOURCE: Charlotte-Mecklenburg Planning Department, Noell Consulting Group



CITY OF CHARLOTTE  
ESTIMATED DEVELOPMENT POTENTIAL FOR  
TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 16  
Retail Space Delivered by District, 2000 - 2007

District	Retail Development by Year								
	2000	2001	2002	2003	2004	2005	2006	2007	Totals
<b>Central Totals</b>	<b>339,003</b>	<b>57,242</b>	<b>218,037</b>	<b>78,724</b>	<b>82,437</b>	<b>274,228</b>	<b>33,641</b>	<b>124,638</b>	<b>1,207,950</b>
Central Capture	10.9%	2.5%	17.5%	6.7%	3.4%	9.0%	1.8%	9.3%	7.3%
<b>North Totals</b>	<b>474,335</b>	<b>344,084</b>	<b>182,081</b>	<b>227,510</b>	<b>419,809</b>	<b>115,548</b>	<b>72,068</b>	<b>329,448</b>	<b>2,164,883</b>
North Capture	15.2%	15.3%	14.6%	19.4%	17.1%	3.8%	3.8%	24.6%	13.1%
<b>Northeast Totals</b>	<b>634,683</b>	<b>233,567</b>	<b>25,247</b>	<b>195,960</b>	<b>474,530</b>	<b>151,215</b>	<b>343,499</b>	<b>176,043</b>	<b>2,234,744</b>
Northeast Capture	20.4%	10.4%	2.0%	16.7%	19.3%	5.0%	18.1%	13.1%	13.5%
<b>Northwest Totals</b>	<b>41,950</b>	<b>113,682</b>	<b>58,144</b>	<b>33,896</b>	<b>250,937</b>	<b>1,190,580</b>	<b>77,472</b>	<b>121,084</b>	<b>1,887,745</b>
Northwest Capture	1.3%	5.1%	4.7%	2.9%	10.2%	39.2%	4.1%	9.0%	11.4%
<b>South Totals</b>	<b>1,072,518</b>	<b>496,296</b>	<b>404,585</b>	<b>304,408</b>	<b>666,042</b>	<b>814,178</b>	<b>796,239</b>	<b>348,241</b>	<b>4,902,507</b>
South Capture	34.5%	22.1%	32.5%	26.0%	27.1%	26.8%	41.9%	26.0%	29.7%
<b>Southeast Totals</b>	<b>244,605</b>	<b>759,119</b>	<b>154,890</b>	<b>195,897</b>	<b>491,707</b>	<b>294,706</b>	<b>170,791</b>	<b>97,710</b>	<b>2,409,425</b>
Southeast Capture	7.9%	33.8%	12.5%	16.7%	20.0%	9.7%	9.0%	7.3%	14.6%
<b>Southwest Totals</b>	<b>304,789</b>	<b>241,829</b>	<b>200,170</b>	<b>135,445</b>	<b>71,702</b>	<b>200,080</b>	<b>405,043</b>	<b>141,941</b>	<b>1,700,999</b>
Southwest Capture	9.8%	10.8%	16.1%	11.6%	2.9%	6.6%	21.3%	10.6%	10.3%
<b>Total</b>	<b>3,111,883</b>	<b>2,245,819</b>	<b>1,243,154</b>	<b>1,171,840</b>	<b>2,457,164</b>	<b>3,040,535</b>	<b>1,898,753</b>	<b>1,339,105</b>	<b>16,508,253</b>



SOURCE: Charlotte-Mecklenburg Planning Department



CITY OF CHARLOTTE  
ESTIMATED DEVELOPMENT POTENTIAL  
FOR TRANSIT CORRIDORS & ACTIVITY CENTERS



Exhibit 17  
Retail Space Delivered by Activity Center, 2000 - 2007

Corridor	Retail Development by Year								Totals
	2000	2001	2002	2003	2004	2005	2006	2007	
Northlake Totals	173,615	4,682	-	77,759	37,200	1,239,045	64,332	71,536	<b>1,668,169</b>
Northlake Capture	5.2%	0.2%	0.0%	6.6%	1.5%	32.4%	3.4%	5.3%	<b>9.3%</b>
Univ Res Park Totals	174,834	16,627	-	88,791	13,378	28,093	47,766	30,300	<b>399,789</b>
Univ Res Park Capture	5.2%	0.6%	0.0%	7.6%	0.5%	0.7%	2.5%	2.3%	<b>2.2%</b>
Downtown Totals	9,032	-	41,742	-	2,720	-	19,886	28,157	<b>101,537</b>
Downtown Capture	0.3%	0.0%	3.4%	0.0%	0.1%	0.0%	1.0%	2.1%	<b>0.6%</b>
Southpark Totals	-	110,367	38,069	-	262,253	59,904	313,817	14,634	<b>799,044</b>
Southpark Capture	0.0%	4.0%	3.1%	0.0%	10.7%	1.6%	16.5%	1.1%	<b>4.4%</b>
Cotswold Totals	97,293	-	-	2,560	-	-	-	46,271	<b>146,124</b>
Cotswold Capture	2.9%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	3.5%	<b>0.8%</b>
Ballantyne Totals	89,104	8,278	4,316	9,332	76,441	259,095	82,485	5,136	<b>534,187</b>
Ballantyne Capture	2.7%	0.3%	0.3%	0.8%	3.1%	6.8%	4.3%	0.4%	<b>3.0%</b>
Coliseum Totals	3,568	-	-	-	8,760	9,649	8,590	-	<b>30,567</b>
Coliseum Capture	0.1%	0.0%	0.0%	0.0%	0.4%	0.3%	0.5%	0.0%	<b>0.2%</b>
Whitehall Totals	149,316	8,244	187,234	116,898	27,907	24,952	57,683	18,555	<b>590,789</b>
Whitehall Capture	4.5%	0.3%	15.1%	10.0%	1.1%	0.7%	3.0%	1.4%	<b>3.3%</b>
Steele Creek Totals	130,567	6,479	-	4,761	-	107,349	240,000	25,229	<b>514,385</b>
Steele Creek Capture	3.9%	0.2%	0.0%	0.4%	0.0%	2.8%	12.6%	1.9%	<b>2.9%</b>
<b>Mecklenburg County Totals</b>	<b>3,345,692</b>	<b>2,731,137</b>	<b>1,243,154</b>	<b>1,171,840</b>	<b>2,457,164</b>	<b>3,820,535</b>	<b>1,898,753</b>	<b>1,339,105</b>	<b>18,007,380</b>
<b>Activity Centers Combined</b>	<b>827,329</b>	<b>154,677</b>	<b>271,361</b>	<b>300,101</b>	<b>428,659</b>	<b>1,728,087</b>	<b>834,559</b>	<b>239,818</b>	<b>4,784,591</b>
<b>Captures Combined</b>	<b>24.7%</b>	<b>5.7%</b>	<b>21.8%</b>	<b>25.6%</b>	<b>17.4%</b>	<b>45.2%</b>	<b>44.0%</b>	<b>17.9%</b>	<b>26.6%</b>

SOURCE: Charlotte-Mecklenburg Planning Department, Noell Consulting Group



CITY OF CHARLOTTE  
ESTIMATED DEVELOPMENT POTENTIAL  
FOR TRANSITY CORRIDORS & ACTIVITY CENTERS

Exhibit 18  
Retail Space Delivered by Corridor, 2000 - 2007

Retail Development by Year									
Corridor	2000	2001	2002	2003	2004	2005	2006	2007	Totals
North Corridor Totals	142,808	66,944	1,344	80,422	130,250	14,307	16,943	249,662	702,680
North Corridor Capture	4.6%	3.0%	0.1%	6.9%	5.3%	0.5%	0.9%	18.6%	4.3%
Charlotte Stations	9,812	21,996	-	13,353	96,172	4,522	-	5,151	151,006
Town Stations	132,996	44,948	1,344	67,069	34,078	9,785	16,943	244,511	551,674
								<b>Charlotte Stations</b>	<b>21%</b>
								<b>Town Stations</b>	<b>79%</b>
Northeast Corridor Totals	211,644	113,709	18,095	20,380	164,293	47,480	35,678	24,862	636,141
Northeast Corridor Capture	6.8%	5.1%	1.5%	1.7%	6.7%	1.6%	1.9%	1.9%	3.9%
Intown Split	12,314	10,560	7,604	6,591	7,348	33,881	6,074	-	84,372
Suburban Split	199,330	103,149	10,491	13,789	156,945	13,599	29,604	24,862	551,769
								<b>Intown Stations</b>	<b>13%</b>
								<b>Suburban Stations</b>	<b>87%</b>
Southeast Corridor Totals	92,650	692,219	60,322	64,292	47,749	75,050	79,438	53,008	1,164,728
Southeast Corridor Capture	3.0%	30.8%	4.9%	5.5%	1.9%	2.5%	4.2%	4.0%	7.1%
Intown Split	19,628	-	-	9,271	-	-	-	12,082	40,981
Suburban Split	73,022	692,219	60,322	55,021	47,749	75,050	79,438	40,926	1,123,747
								<b>Intown Stations</b>	<b>4%</b>
								<b>Suburban Stations</b>	<b>96%</b>
South Corridor Totals	169,695	209,705	43,802	58,476	116,562	4,739	85,004	5,493	693,476
South Corridor Capture	5.5%	9.3%	3.5%	5.0%	4.7%	0.2%	4.5%	0.4%	4.2%
Intown Split	97,982	13,629	11,771	18,669	22,026	-	-	1,815	165,892
Suburban Split	71,713	196,076	32,031	39,807	94,536	4,739	85,004	3,678	527,584
								<b>Intown Stations</b>	<b>24%</b>
								<b>Suburban Stations</b>	<b>76%</b>
Mecklenburg County	3,111,883	2,245,819	1,243,154	1,171,840	2,457,164	3,040,535	1,898,753	1,339,105	16,508,253
Four Corridors	616,797	1,082,577	123,563	223,570	458,854	141,576	217,063	333,025	3,197,025
Four Corridor Capture	20%	48%	10%	19%	19%	5%	11%	25%	19%
								<b>Intown Stations</b>	<b>9%</b>
								<b>Suburban Stations</b>	<b>91%</b>

SOURCE: Charlotte-Mecklenburg Planning Department, Noell Consulting Group



CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS



Exhibit 19  
 Office Growth and Allocations, 2005 - 2035

Estimated Annual Office Demand	2005 - 2010	2010 - 2015	2015 - 2020	2020 - 2025	2025 - 2030	2030 - 2035	Annual Average
Total Employment Growth	69,374	63,722	85,835	78,866	79,051	74,188	15,035
Avg Office SF/Total Employee							
Based on Karnes/CoStar	72.0						
Based on CMPC Data	174.9						
Estimated <u>Annual</u> Demand for Office							
Based on Karnes/CoStar	999,644	918,198	1,236,842	1,136,420	1,139,087	1,069,009	1,083,200
Based on CMPC Data	2,426,085	2,228,420	3,001,751	2,758,032	2,764,506	2,594,430	2,628,871
<b>Weighted Average</b>	<b>1,712,865</b>	<b>1,573,309</b>	<b>2,119,297</b>	<b>1,947,226</b>	<b>1,951,797</b>	<b>1,831,720</b>	<b>1,856,035</b>

	2005 - 2010	2010 - 2015	2015 - 2020	2020 - 2025	2025 - 2030	2030 - 2035	Annual Average
Central	23.2%	20.2%	19.8%	21.3%	22.3%	22.3%	21.5%
North	8.1%	8.9%	9.8%	11.4%	12.1%	13.0%	10.5%
Northeast	15.7%	21.0%	15.8%	15.3%	15.7%	15.8%	16.5%
Northwest	0.9%	2.0%	2.3%	2.6%	3.0%	3.3%	2.3%
South	31.2%	23.9%	28.3%	24.9%	23.2%	22.0%	25.6%
Southeast	5.3%	5.0%	4.8%	5.0%	5.2%	5.2%	5.1%
Southwest	15.6%	19.0%	19.3%	19.5%	18.5%	18.3%	18.4%
	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

Office Demand by District	2005 - 2010	2010 - 2015	2015 - 2020	2020 - 2025	2025 - 2030	2030 - 2035	Annual Average
Central	397,385	317,557	419,204	414,055	435,778	408,969	398,825
North	138,742	140,182	207,712	221,383	235,217	238,406	196,940
Northeast	268,920	330,395	333,789	297,487	307,131	289,677	304,567
Northwest	15,416	31,152	48,256	50,989	58,775	60,675	44,210
South	534,414	376,021	600,217	485,306	452,394	403,334	475,281
Southeast	90,782	79,216	101,371	97,798	101,948	95,676	94,465
Southwest	267,207	299,432	409,798	380,291	360,218	334,677	341,937
	<b>1,712,865</b>	<b>1,573,954</b>	<b>2,120,347</b>	<b>1,947,309</b>	<b>1,951,462</b>	<b>1,831,414</b>	<b>1,856,225</b>

% Captured in Activity Centers	2005 - 2010	2010 - 2015	2015 - 2020	2020 - 2025	2025 - 2030	2030 - 2035	Annual Average
Central	82.0%	76.0%	74.0%	72.0%	72.0%	70.0%	74.3%
North	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Northeast	62.0%	10.0%	62.0%	60.0%	55.0%	55.0%	50.7%
Northwest	67.0%	90.0%	90.0%	90.0%	90.0%	90.0%	86.2%
South	63.0%	55.0%	70.0%	65.0%	65.0%	65.0%	63.8%
Southeast	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Southwest	93.0%	88.4%	83.9%	79.7%	79.7%	79.7%	84.1%



CITY OF CHARLOTTE  
ESTIMATED DEVELOPMENT POTENTIAL  
FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 19  
Office Growth and Allocations, 2005 - 2035

Annual Office Demand by Activity Center	2005 - 2010	2010 - 2015	2015 - 2020	2020 - 2025	2025 - 2030	2030 - 2035	Annual Average
Center City	260,684	205,142	263,679	253,402	266,696	243,336	248,823
Southpark	115,673	67,223	109,554	92,035	91,172	82,267	92,988
Cotswold	16,834	10,341	21,008	15,772	14,703	13,108	15,294
Ballantyne	269,345	165,449	336,121	252,359	235,245	209,734	244,709
Coliseum	49,700	52,910	68,791	60,646	57,445	53,371	57,144
Whitehall	186,377	198,411	257,965	227,421	215,417	200,143	214,289
Steele Creek	12,425	13,227	17,198	15,161	14,361	13,343	14,286
Northlake	43,675	34,644	84,821	81,589	86,682	86,472	69,647
Univ Research Park	133,384	26,432	165,559	142,794	135,138	127,458	121,794
<b>Total in Activity Centers</b>	<b>1,088,097</b>	<b>773,779</b>	<b>1,324,696</b>	<b>1,141,179</b>	<b>1,116,859</b>	<b>1,029,233</b>	<b>1,078,974</b>

Estimated Office Demand by Five-Year Increments	2005 - 2010	2010 - 2015	2015 - 2020	2020 - 2025	2025 - 2030	2030 - 2035	Totals
Center City	1,303,422	1,025,708	1,318,395	1,267,009	1,333,482	1,216,682	7,464,698
Southpark	578,366	336,116	547,772	460,176	455,862	411,334	2,789,626
Cotswold	84,170	51,703	105,038	78,862	73,514	65,542	458,829
Ballantyne	1,346,723	827,246	1,680,606	1,261,795	1,176,223	1,048,668	7,341,261
Coliseum	248,502	264,548	343,954	303,228	287,223	266,857	1,714,313
Whitehall	931,884	992,056	1,289,826	1,137,106	1,077,087	1,000,715	6,428,675
Steele Creek	62,126	66,137	85,988	75,807	71,806	66,714	428,578
Northlake	218,373	173,221	424,103	407,943	433,410	432,360	2,089,411
Univ Research Park	666,921	132,158	827,797	713,970	675,689	637,290	3,653,825
<b>Total in Activity Centers</b>	<b>5,440,487</b>	<b>3,868,894</b>	<b>6,623,480</b>	<b>5,705,896</b>	<b>5,584,297</b>	<b>5,146,163</b>	<b>32,369,217</b>

	2005 - 2010	2010 - 2015	2015 - 2020	2020 - 2025	2025 - 2030	2030 - 2035	Totals
<b>% Outside of Activity Centers</b>							
Central	18.0%	24.0%	26.0%	28.0%	28.0%	30.0%	
North	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
Northeast	38.0%	90.0%	38.0%	40.0%	45.0%	45.0%	
Northwest	33.0%	10.0%	10.0%	10.0%	10.0%	10.0%	
South	37.0%	45.0%	30.0%	35.0%	35.0%	35.0%	
Southeast	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
Southwest	7.0%	11.7%	16.1%	20.3%	20.3%	20.3%	

Office Demand Available Outside of Activity Centers	2005 - 2010	2010 - 2015	2015 - 2020	2020 - 2025	2025 - 2030	2030 - 2035	Annual Average
Central	71,529	76,214	108,993	115,935	122,018	122,691	102,897
North	138,742	140,182	207,712	221,383	235,217	238,406	196,940
Northeast	102,190	297,355	126,840	118,995	138,209	130,355	152,324
Northwest	5,087	3,115	4,826	5,099	5,878	6,068	5,012
South	197,733	169,209	180,065	169,857	158,338	141,167	169,395
Southeast	90,782	79,216	101,371	97,798	101,948	95,676	94,465
Southwest	18,704	34,884	65,844	77,063	72,995	67,819	56,218
<b>Total Outside Activity Centers</b>	<b>624,767</b>	<b>800,175</b>	<b>795,651</b>	<b>806,130</b>	<b>834,603</b>	<b>802,181</b>	<b>777,251</b>





CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 19  
 Office Growth and Allocations, 2005 - 2035

Corridor Captures of Potential Office Demand	2005 - 2010	2010 - 2015	2015 - 2020	2020 - 2025	2025 - 2030	2030 - 2035	Totals
<b>South Corridor</b>							
Central District	40%	41%	42%	42%	43%	43%	
South District	10%	10%	10%	10%	10%	10%	
Southwest District	5%	8%	15%	20%	20%	20%	
<b>North Corridor</b>							
Charlotte Sphere	25%	8%	25%	25%	25%	25%	
Northern Towns	20%	35%	35%	35%	35%	35%	
<b>Northeast Corridor</b>							
Central District	10%	13%	13%	13%	13%	13%	
Northeast District	35%	90%	35%	45%	50%	50%	
<b>Southeast Corridor</b>							
Central District	12%	12%	14%	15%	15%	15%	
Southeast/East District	50%	50%	60%	70%	70%	70%	

Capture by Corridor	2005 - 2010	2010 - 2015	2015 - 2020	2020 - 2025	2025 - 2030	2030 - 2035	Totals
<b>South Corridor</b>							
Central District	49,320	50,785	73,660	81,091	82,901	80,438	2,090,972
South District	28,612	31,248	45,777	48,693	52,468	52,757	1,297,769
Southwest District	19,773	16,921	18,006	16,986	15,834	14,117	508,184
Southwest District	935	2,616	9,877	15,413	14,599	13,564	285,018
<b>North Corridor</b>							
Charlotte Sphere	53,296	71,365	104,409	107,233	116,878	116,031	2,846,061
Charlotte Sphere	25,547	22,302	31,710	29,749	34,552	32,589	882,244
Northern Towns	27,748	49,064	72,699	77,484	82,326	83,442	1,963,818
<b>Northeast Corridor</b>							
Central District	42,919	277,528	58,563	68,619	84,967	81,127	3,068,617
Central District	7,153	9,908	14,169	15,072	15,862	15,950	390,567
Northeast District	35,766	267,620	44,394	53,548	69,105	65,177	2,678,049
<b>Southeast Corridor</b>							
Central District	53,974	48,754	76,082	85,849	89,667	85,377	2,198,511
Central District	8,584	9,146	15,259	17,390	18,303	18,404	435,424
Southeast/East District	45,391	39,608	60,823	68,458	71,364	66,973	1,763,087



CITY OF CHARLOTTE  
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FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 19  
Office Growth and Allocations, 2005 - 2035

Captures by Station Area	2005 - 2010	2010 - 2015	2015 - 2020	2020 - 2025	2025 - 2030	2030 - 2035	Totals
<b>South Corridor</b>							
<b>Central Stations</b>	<b>28,612</b>	<b>31,248</b>	<b>45,777</b>	<b>48,693</b>	<b>52,468</b>	<b>52,757</b>	<b>1,297,769</b>
South End Stations	18,598	18,749	25,177	24,346	23,610	21,103	657,916
New Bern	4,292	3,125	4,578	4,869	7,870	7,914	163,236
Scaleybark	2,861	4,687	6,867	7,304	5,247	5,276	161,206
Woodlawn	2,861	4,687	9,155	12,173	15,740	18,465	315,411
<b>South/Southwest Stations</b>	<b>20,709</b>	<b>19,537</b>	<b>27,883</b>	<b>32,398</b>	<b>30,433</b>	<b>27,681</b>	<b>793,202</b>
Tyvola	14,496	13,676	16,730	19,439	16,738	13,840	474,596
Archdale	0	0	0	1,620	1,522	1,384	22,628
Arrowood	2,071	1,954	2,788	1,620	1,522	1,384	56,692
Sharon Lakes	0	0	1,394	1,620	1,522	1,384	29,599
I-485	4,142	3,907	6,971	8,100	9,130	9,688	209,688
<b>North Corridor</b>							
<b>Northeast Stations</b>	<b>25,547</b>	<b>22,302</b>	<b>38,980</b>	<b>37,497</b>	<b>42,785</b>	<b>40,933</b>	<b>1,040,219</b>
Derita	1,277	1,115	0	0	0	0	11,962
Harris	15,328	8,921	14,269	11,899	13,821	13,035	386,372
Eastfield	8,942	12,266	24,710	25,598	28,964	27,897	641,885
<b>North Stations</b>	<b>26,361</b>	<b>49,064</b>	<b>65,429</b>	<b>69,736</b>	<b>74,093</b>	<b>75,098</b>	<b>1,798,905</b>
Hambright	4,162	34,345	47,255	50,365	53,512	54,237	1,219,376
Huntersville	2,775	2,453	3,635	3,874	4,116	4,172	105,128
Caldwell Station	2,775	2,453	7,270	7,748	8,233	8,344	184,116
Cornelius	6,937	4,906	3,635	3,874	4,116	4,172	138,205
Davidson	9,712	4,906	3,635	3,874	4,116	4,172	152,079
<b>Northeast Corridor</b>							
<b>Central Stations</b>	<b>7,153</b>	<b>9,908</b>	<b>14,169</b>	<b>15,072</b>	<b>15,862</b>	<b>15,950</b>	<b>390,567</b>
Parkwood	1,431	2,972	4,959	5,275	5,552	5,582	128,857
27th Street	1,788	2,477	3,542	3,768	3,966	3,987	97,642
36th Street	3,576	3,963	4,251	4,521	4,759	4,785	129,277
Sugar Creek	358	495	1,417	1,507	1,586	1,595	34,792
<b>Northeast Stations</b>	<b>35,766</b>	<b>267,620</b>	<b>44,394</b>	<b>53,548</b>	<b>69,105</b>	<b>65,177</b>	<b>2,678,049</b>
Old Concord Road	0	0	0	0	3,455	3,259	33,570
Tom Hunter	0	0	0	0	3,455	3,259	33,570
University City Boulevard	8,942	14,987	5,771	6,961	8,984	8,473	270,587
McCullough	12,518	18,466	11,098	13,387	13,821	13,035	411,629
JW Clay Blvd	8,942	10,437	14,206	17,135	18,658	17,598	434,881
UNC Charlotte	0	0	0	0	0	0	0
Mallard Creek Church	5,365	223,730	8,879	10,710	10,366	9,777	1,344,129
I-485/N. Tryon	0	0	4,439	5,355	10,366	9,777	149,682



CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 19  
 Office Growth and Allocations, 2005 - 2035

	2005 - 2010	2010 - 2015	2015 - 2020	2020 - 2025	2025 - 2030	2030 - 2035	Totals
<b>Southeast Corridor</b>							
<b>Central Stations</b>	<b>8,584</b>	<b>9,146</b>	<b>15,259</b>	<b>17,390</b>	<b>18,303</b>	<b>18,404</b>	<b>435,424</b>
Elizabeth	5,579	5,945	8,392	9,565	10,066	10,122	248,348
Pecan	2,146	2,286	4,578	5,217	5,491	5,521	126,195
Briar Creek	858	915	2,289	2,609	2,745	2,761	60,881
<b>East/Southeast Stations</b>	<b>45,391</b>	<b>39,608</b>	<b>60,823</b>	<b>68,458</b>	<b>71,364</b>	<b>66,973</b>	<b>1,763,087</b>
Amity Gardens	0	0	3,041	6,846	7,136	10,046	135,347
Sharon Amity	0	1,980	3,041	3,423	3,568	3,349	76,807
Idlewild/Conference	0	0	0	3,423	3,568	3,349	51,699
Village Lake	4,539	3,961	6,082	6,846	7,136	3,349	159,565
Sardis North	9,078	7,922	12,165	13,692	10,705	6,697	301,290
Independence Pointe	6,809	3,961	3,041	3,423	3,568	3,349	120,752
NC 51	18,156	13,863	18,247	10,269	10,705	6,697	389,683
Matthews TOD	2,270	1,980	6,082	6,846	7,136	6,697	155,059
CPCC	4,539	5,941	9,123	13,692	17,841	23,441	372,885



CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 20  
 Assignment of Household Growth Pool by District, 2005 - 2035

Estimated Household Growth	Rental Apartments	For-Sale Attached	Trade-Off SFD	Total Demand Pool
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Pool of Household Growth by Period

2005 - 2010	9,101	7,918	4,560	21,580
2010 - 2015	9,049	7,961	4,979	21,989
2015 - 2020	8,592	7,656	5,100	21,348
2020 - 2025	9,286	7,648	5,608	22,541
2025 - 2030	8,795	7,030	5,098	20,922
2030 - 2035	9,164	7,545	5,391	22,100

2005 - 2010

Central	25%	33%	10%	25%
	<b>2,275</b>	<b>2,613</b>	<b>440</b>	<b>5,329</b>
North	6%	13%	16%	11%
	<b>546</b>	<b>1,029</b>	<b>730</b>	<b>2,305</b>
Northeast	33%	8%	16%	20%
	<b>3,003</b>	<b>633</b>	<b>730</b>	<b>4,366</b>
Northwest	1%	4%	15%	5%
	<b>91</b>	<b>317</b>	<b>684</b>	<b>1,092</b>
South	11%	28%	13%	18%
	<b>1,001</b>	<b>2,217</b>	<b>593</b>	<b>3,811</b>
Southeast/East	2%	5%	13%	5%
	<b>182</b>	<b>396</b>	<b>593</b>	<b>1,171</b>
Southwest	22%	9%	17%	0%
	<b>2,002</b>	<b>713</b>	<b>775</b>	<b>3,490</b>
Totals	100%	100%	100%	100%
	<b>9,101</b>	<b>7,918</b>	<b>4,545</b>	<b>21,564</b>





CITY OF CHARLOTTE  
ESTIMATED DEVELOPMENT POTENTIAL  
FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 20  
Assignment of Household Growth Pool by District, 2005 - 2035

Estimated Household Growth	Rental Apartments	For-Sale Attached	Trade-Off SFD	Total Demand Pool
<b>2010 - 2015</b>				
Central	26%	31%	10%	24%
	2,353	2,468	498	5,319
North	7%	14%	17%	12%
	633	1,115	846	2,594
Northeast	25%	6%	15%	16%
	2,262	478	747	3,487
Northwest	3%	4%	14%	6%
	271	318	697	1,287
South	14%	29%	14%	19%
	1,267	2,309	697	4,273
Southeast/East	4%	5%	12%	6%
	362	398	597	1,357
Southwest	21%	11%	18%	17%
	1,900	876	896	3,672
	100%	100%	100%	100%
<b>Totals</b>	<b>9,049</b>	<b>7,961</b>	<b>4,979</b>	<b>21,989</b>
<b>2015 - 2020</b>				
Central	26%	31%	9%	24%
	2,234	2,373	459	5,066
North	7%	14%	17%	12%
	601	1,072	867	2,540
Northeast	24%	7%	16%	16%
	2,062	536	816	3,414
Northwest	3%	3%	14%	6%
	258	230	714	1,201
South	14%	28%	13%	19%
	1,203	2,144	663	4,010
Southeast/East	6%	5%	13%	7%
	516	383	663	1,561
Southwest	20%	12%	18%	17%
	1,718	919	918	3,555
	100%	100%	100%	100%
<b>Totals</b>	<b>8,592</b>	<b>7,656</b>	<b>5,100</b>	<b>21,348</b>



CITY OF CHARLOTTE  
ESTIMATED DEVELOPMENT POTENTIAL  
FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 20  
Assignment of Household Growth Pool by District, 2005 - 2035

Estimated Household Growth	Rental Apartments	For-Sale Attached	Trade-Off SFD	Total Demand Pool
<b>2020 - 2025</b>				
Central	27%	31%	10%	24%
	2,507	2,371	561	5,439
North	7%	15%	17%	12%
	650	1,147	953	2,751
Northeast	24%	8%	14%	16%
	2,229	612	785	3,625
Northwest	4%	3%	14%	6%
	371	229	785	1,386
South	14%	26%	14%	18%
	1,300	1,988	785	4,074
Southeast/East	6%	5%	13%	7%
	557	382	729	1,669
Southwest	18%	12%	18%	16%
	1,671	918	1,009	3,599
	100%	100%	100%	100%
<b>Totals</b>	<b>9,286</b>	<b>7,648</b>	<b>5,608</b>	<b>22,541</b>
<b>2025 - 2030</b>				
Central	25%	29%	6%	22%
	2,199	2,039	306	4,543
North	8%	16%	18%	13%
	704	1,125	918	2,746
Northeast	24%	9%	16%	17%
	2,111	633	816	3,559
Northwest	4%	3%	14%	6%
	352	211	714	1,276
South	15%	25%	16%	19%
	1,319	1,757	816	3,892
Southeast/East	6%	6%	12%	7%
	528	422	612	1,561
Southwest	18%	12%	18%	16%
	1,583	844	918	3,344
	100%	100%	100%	100%
<b>Totals</b>	<b>8,795</b>	<b>7,030</b>	<b>5,098</b>	<b>20,922</b>



CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 20  
 Assignment of Household Growth Pool by District, 2005 - 2035

Estimated Household Growth	Rental Apartments	For-Sale Attached	Trade-Off SFD	Total Demand Pool
<b>2030 - 2035</b>				
Central	25%	30%	7%	22%
	<b>2,291</b>	<b>2,264</b>	<b>377</b>	<b>4,932</b>
North	8%	16%	18%	13%
	<b>733</b>	<b>1,207</b>	<b>970</b>	<b>2,911</b>
Northeast	24%	8%	16%	17%
	<b>2,199</b>	<b>604</b>	<b>863</b>	<b>3,666</b>
Northwest	4%	3%	13%	6%
	<b>367</b>	<b>226</b>	<b>701</b>	<b>1,294</b>
South	15%	26%	17%	19%
	<b>1,375</b>	<b>1,962</b>	<b>916</b>	<b>4,253</b>
Southeast/East	6%	6%	13%	8%
	<b>550</b>	<b>453</b>	<b>701</b>	<b>1,703</b>
Southwest	18%	11%	16%	15%
	<b>1,650</b>	<b>830</b>	<b>863</b>	<b>3,342</b>
Totals	100%	100%	100%	100%
	<b>9,164</b>	<b>7,545</b>	<b>5,391</b>	<b>22,100</b>



CITY OF CHARLOTTE  
ESTIMATED DEVELOPMENT POTENTIAL  
FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 21  
Allocation of Higher-Density Attached and Detached Residential Units  
By District, Transit Corridor, and Activity Center

Units by District	2005 - 2010	2010 - 2015	2015 - 2020	2020 - 2025	2025 - 2030	2030 - 2035	Avg 5-Yr Period
Central	5,329	5,319	5,066	5,439	4,543	4,932	5,105
North	2,305	2,594	2,540	2,751	2,746	2,911	2,641
Northeast	4,366	3,487	3,414	3,625	3,559	3,666	3,686
Northwest	1,092	1,287	1,201	1,386	1,276	1,294	1,256
South	3,811	4,273	4,010	4,074	3,892	4,253	4,052
Southeast	1,171	1,357	1,561	1,669	1,561	1,703	1,504
Southwest	3,490	3,672	3,555	3,599	3,344	3,342	3,500
	<b>21,564</b>	<b>21,989</b>	<b>21,348</b>	<b>22,541</b>	<b>20,922</b>	<b>22,100</b>	<b>21,744</b>

% Captured in Activity Centers	2005 - 2010	2010 - 2015	2015 - 2020	2020 - 2025	2025 - 2030	2030 - 2035	Avg 5-Yr Period
Central	35%	30%	30%	27%	27%	27%	29.3%
North	0%	0%	0%	0%	0%	0%	0.0%
Northeast	16%	20%	25%	25%	20%	20%	21.0%
Northwest	39%	60%	60%	60%	50%	50%	53.2%
South	30%	30%	30%	35%	35%	35%	32.4%
Southeast	0%	0%	0%	0%	0%	0%	0.0%
Southwest	50%	55%	50%	45%	45%	40%	47.5%

Activity Center Units by District	2005 - 2010	2010 - 2015	2015 - 2020	2020 - 2025	2025 - 2030	2030 - 2035	Avg 5-Yr Period
Central	1,865	1,596	1,520	1,468	1,227	1,332	1,501
North	-	-	-	-	-	-	0
Northeast	699	697	854	906	712	733	767
Northwest	426	772	721	832	638	647	673
South	1,124	1,282	1,203	1,426	1,362	1,488	1,314
Southeast	-	-	-	-	-	-	0
Southwest	1,742	2,020	1,778	1,619	1,505	1,337	1,667
	<b>5,855</b>	<b>6,367</b>	<b>6,075</b>	<b>6,251</b>	<b>5,444</b>	<b>5,537</b>	<b>5,921</b>

Units by Activity Center	2005 - 2010	2010 - 2015	2015 - 2020	2020 - 2025	2025 - 2030	2030 - 2035	Avg 5-Yr Period
Center City	1,679	1,436	1,368	1,322	1,104	1,198	1,351
Southpark	355	352	332	361	327	356	347
Cotswold	22	26	24	29	27	30	26
Ballantyne	899	1,025	962	1,141	1,090	1,191	1,051
Coliseum	348	404	356	324	301	267	333
Whitehall	1,132	1,313	1,155	1,053	978	869	1,083
Steele Creek	174	202	178	162	150	134	167
Northlake	496	842	806	922	709	720	749
Univ Research Park	629	628	768	816	641	660	690
<b>Total in Activity Centers</b>	<b>5,735</b>	<b>6,227</b>	<b>5,950</b>	<b>6,128</b>	<b>5,328</b>	<b>5,425</b>	<b>5,799</b>



CITY OF CHARLOTTE  
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Exhibit 21  
Allocation of Higher-Density Attached and Detached Residential Units  
By District, Transit Corridor, and Activity Center

% Outside of Activity Centers	2005 - 2010	2010 - 2015	2015 - 2020	2020 - 2025	2025 - 2030	2030 - 2035	Totals
Central	65.0%	70.0%	70.0%	73.0%	73.0%	73.0%	
North	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
Northeast	84.0%	80.0%	75.0%	75.0%	80.0%	80.0%	
Northwest	61.0%	40.0%	40.0%	40.0%	50.0%	50.0%	
South	70.5%	70.0%	70.0%	65.0%	65.0%	65.0%	
Southeast	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
Southwest	50.1%	45.0%	50.0%	55.0%	55.0%	60.0%	

	2005 - 2010	2010 - 2015	2015 - 2020	2020 - 2025	2025 - 2030	2030 - 2035	Avg 5-Yr Period
Central	3,464	3,723	3,546	3,970	3,316	3,600	3,603
North	2,305	2,594	2,540	2,751	2,746	2,911	2,641
Northeast	3,668	2,789	2,561	2,719	2,847	2,932	2,919
Northwest	666	515	481	554	638	647	583
South	2,687	2,991	2,807	2,648	2,530	2,764	2,738
Southeast	1,171	1,357	1,561	1,669	1,561	1,703	1,504
Southwest	1,749	1,653	1,778	1,979	1,839	2,005	1,834
<b>Available Outside of Activity Centers</b>	<b>15,709</b>	<b>15,623</b>	<b>15,273</b>	<b>16,290</b>	<b>15,479</b>	<b>16,563</b>	<b>15,823</b>

Corridor Allocations by District	2005 - 2010	2010 - 2015	2015 - 2020	2020 - 2025	2025 - 2030	2030 - 2035	Totals
<b>South Corridor</b>							
Central District	40%	40%	40%	35%	35%	35%	
South District	15%	25%	30%	35%	40%	45%	
Southwest District	10%	20%	20%	25%	25%	25%	
<b>North Corridor</b>							
Charlotte Sphere	15%	15%	20%	20%	20%	20%	
Northern Towns	40%	50%	55%	60%	60%	65%	
<b>Northeast Corridor</b>							
Central District	15%	15%	20%	20%	20%	20%	
Northeast District	30%	30%	35%	40%	45%	45%	
<b>Southeast Corridor</b>							
Central District	13%	16%	17%	17%	17%	17%	
Southeast/East District	30%	40%	55%	65%	65%	65%	





CITY OF CHARLOTTE  
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FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 21  
Allocation of Higher-Density Attached and Detached Residential Units  
By District, Transit Corridor, and Activity Center

Units Available by Corridor	2005 - 2010	2010 - 2015	2015 - 2020	2020 - 2025	2025 - 2030	2030 - 2035	Totals
<b>South Corridor</b>	1,963	2,567	2,616	2,811	2,633	3,005	15,596
Central District	1,385	1,489	1,419	1,390	1,161	1,260	8,104
South District	403	748	842	927	1,012	1,244	5,175
Southwest District	175	331	356	495	460	501	2,317
<b>North Corridor</b>	1,472	1,716	1,909	2,194	2,217	2,478	11,987
Charlotte Sphere	550	418	512	544	569	586	3,180
Northern Towns	922	1,297	1,397	1,650	1,648	1,892	8,806
<b>Northeast Corridor</b>	1,620	1,395	1,605	1,882	1,945	2,040	10,487
Central District	520	558	709	794	663	720	3,965
Northeast District	1,100	837	896	1,088	1,281	1,320	6,522
<b>Southeast Corridor</b>	802	1,139	1,462	1,760	1,579	1,719	8,459
Central District	450	596	603	675	564	612	3,500
Southeast/East District	351	543	859	1,085	1,015	1,107	4,960

South Corridor Allocations	2005 - 2010	2010 - 2015	2015 - 2020	2020 - 2025	2025 - 2030	2030 - 2035	Totals
<b>Central District Stations</b>	1,385	1,489	1,419	1,390	1,161	1,260	8,104
South End Stations	970	819	709	625	464	441	4,029
New Bern	208	298	355	278	174	189	1,501
Scaleybark	208	298	284	278	232	189	1,488
Woodlawn	0	74	71	208	290	441	1,085
<b>South/Southwest District Stations</b>	578	1,078	1,198	1,422	1,472	1,745	7,492
Tyvola	87	270	240	355	442	524	1,916
Archdale	58	108	120	142	147	175	749
Arrowood	202	270	240	213	221	262	1,407
Sharon Lakes	116	216	240	213	221	262	1,267
I-485	116	216	359	498	442	524	2,153

North Corridor Allocations	2005 - 2010	2010 - 2015	2015 - 2020	2020 - 2025	2025 - 2030	2030 - 2035	Totals
<b>Northeast District Stations</b>	550	418	652	709	734	776	3,839
Derita	83	63	51	54	85	88	424
Harris	303	209	256	272	228	235	1,502
Eastfield	165	146	345	383	421	453	1,913
<b>North District Stations</b>	922	1,297	1,257	1,485	1,483	1,703	8,148
Bryton	184	519	419	495	494	662	2,774
Huntersville	92	130	210	248	247	284	1,210
Caldwell Station	92	130	140	330	330	378	1,400
Cornelius	231	259	279	248	247	189	1,453
Davidson	323	259	210	165	165	189	1,311



CITY OF CHARLOTTE  
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Exhibit 21  
 Allocation of Higher-Density Attached and Detached Residential Units  
 By District, Transit Corridor, and Activity Center

	2005 - 2010	2010 - 2015	2015 - 2020	2020 - 2025	2025 - 2030	2030 - 2035	Totals
<b>Northeast Corridor Allocations</b>							
<b>Central District Stations</b>	<b>520</b>	<b>558</b>	<b>709</b>	<b>794</b>	<b>663</b>	<b>720</b>	<b>3,965</b>
Parkwood	104	112	213	238	199	216	1,082
27th Street	156	168	177	199	133	144	976
36th Street	260	279	248	278	232	252	1,549
Sugar Creek	0	0	71	79	99	108	358
<b>Northeast District Stations</b>	<b>1,100</b>	<b>879</b>	<b>1,031</b>	<b>1,196</b>	<b>1,409</b>	<b>1,386</b>	<b>7,001</b>
Old Concord Road	0	0	45	54	128	198	425
Tom Hunter	0	0	45	54	128	198	425
University City Boulevard	385	209	179	218	192	198	1,381
McCullough	385	209	134	109	128	66	1,032
JW Clay Blvd	220	209	224	272	320	330	1,575
UNC Charlotte	0	0	90	109	128	66	392
Mallard Creek Church	55	209	224	218	128	132	966
I-485/N. Tryon	55	42	90	163	256	198	804
<b>Southeast Corridor Allocations</b>							
<b>Central District Stations</b>	<b>450</b>	<b>596</b>	<b>603</b>	<b>675</b>	<b>564</b>	<b>612</b>	<b>3,500</b>
Elizabeth	180	238	241	270	197	214	1,341
Pecan	203	268	241	236	197	214	1,360
Briar Creek	68	89	121	169	169	184	799
<b>East/Southeast District Stations</b>	<b>351</b>	<b>543</b>	<b>859</b>	<b>1,085</b>	<b>1,015</b>	<b>1,107</b>	<b>4,960</b>
Amity Gardens	18	27	129	163	152	221	710
Sharon Amity	0	27	43	108	101	166	446
Idlewild/Conference	0	27	43	108	51	166	395
Village Lake	18	27	43	108	152	111	459
Sardis North	88	136	215	217	152	55	863
Independence Pointe	123	136	129	108	0	0	496
NC 51	105	163	129	108	101	55	662
Matthews TOD	0	0	86	108	152	166	513
CPCC	0	0	43	54	152	166	415



CITY OF CHARLOTTE  
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Exhibit 22

Estimated Net New Retail Supportable by Activity Center, 2008 - 2035

Activity Center	Increased Population			Supportable New Retail from Population Growth			Estimated New Office Space '08 - '35	New Office Workers	Retail Expenditures at Work	Retail SF from New Workers	Net New Retail SF
	08 - 15	08 - 25	08 - 35	08 - 15	08 - 25	08 - 35					
Northlake	11,980	27,233	42,419	167,210	388,077	606,545	2,012,337	6,345	\$22,107,639	80,391	686,937
URP	15,075	32,847	50,236	160,185	365,969	570,354	3,469,470	11,456	\$39,913,125	145,139	715,493
Center City	12,663	27,422	41,507	118,361	269,171	411,474	6,682,645	22,099	\$76,994,426	279,980	691,454
Southpark	9,340	21,093	32,412	126,075	281,325	432,520	2,584,769	8,680	\$30,239,852	109,963	542,483
Cotswold	2,949	7,037	11,247	39,928	96,159	152,195	455,714	1,499	\$5,221,354	18,987	171,181
Ballantyne	8,821	19,547	30,180	80,147	177,576	274,161	7,291,427	23,979	\$83,541,671	303,788	577,949
Coliseum	5,257	11,398	17,182	72,013	156,108	235,313	1,566,226	0	\$0	0	235,313
Whitehall	12,267	26,913	40,850	139,797	306,675	465,417	5,873,349	19,090	\$66,510,302	241,856	707,273
Steele Creek	7,747	16,188	23,424	105,841	221,072	319,728	391,557	1,273	\$4,434,020	16,124	335,852
Totals, Activity Centers	164,449	363,167	555,489	1,009,557	2,262,133	3,467,707	30,327,493	94,421	\$328,962,390	1,196,227	4,663,934
Estimated Capture of County, 2008 - 2035											24.6%
Estimated Capture, 2000 - 2007 (less Northlake Mall)											20.5%

Notes:

Increased population from City of Charlotte and allocated by Noell Consulting Group  
 Areas utilized range from 3 - 5 miles based on location & access of activity center.  
 Expenditures based on data obtained from Claritas for Mecklenburg County.  
 New office space estimated by activity center via allocations of office growth by Noell Consulting Group.  
 Retail expenditures at work based on data obtained from ICSC and conservatively adjusted by Noell Consulting Group.



CITY OF CHARLOTTE  
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FOR TRANSIT CORRIDORS ACTIVITY CENTERS

Exhibit 23  
Allocation of Projected Retail Growth by Station Area

	Mile Radius	Household Growth			Pop/ H'Hold	Per Capita Retail \$	Capture Rate	Retail Capture			Add'l Retail SF from Growth Allocated to Station			Add'l Retail SF from Growth Allocated to Nearby Stations			Total New Retail Space		
		08 - 15	15 - 25	25 - 35				2015	2025	2035	2015	2025	2035	2015	2025	2035	2015	2025	2035
<b>Northeast Corridor</b>																			
I-485/N. Tryon	3	4,543	10,222	15,901	2.45	\$13,363	10%	84,486	190,094	295,701	263	1,492	2,795	10,309	16,297	21,823	95,058	207,883	320,318
Mallard Creek Church	2	2,432	5,472	8,512	2.45	\$13,363	10%	27,135	61,054	94,973	626	1,543	2,140	9,946	16,246	22,477	37,707	78,843	119,590
JW Clay Blvd	2	1,462	3,290	5,118	2.45	\$13,363	10%	16,316	36,710	57,104	3,652	6,372	9,189	12,408	17,222	20,532	32,375	60,304	86,825
McCullough	2	1,900	4,275	6,651	2.45	\$13,363	10%	21,202	47,704	74,206	6,031	8,382	10,493	8,949	13,328	17,591	36,181	69,414	102,290
Univ City Boulevard	2	3,283	7,387	11,491	2.45	\$13,363	25%	183,159	412,107	641,056	14,376	18,242	19,746	22,970	37,505	55,335	220,505	467,854	716,137
Tom Hunter	2	904	2,034	3,164	2.45	\$13,363	10%	10,085	22,692	35,298	0	0	503	5,148	8,043	11,620	15,233	30,734	47,421
Old Concord	2	960	2,160	3,360	2.45	\$13,363	20%	21,421	48,196	74,972	0	0	3,897	7,226	15,619	28,140	28,646	63,815	107,009
Sugar Creek	2	793	1,785	2,776	2.45	\$13,363	15%	13,276	29,871	46,466	0	235	2,660	11,754	22,509	34,322	25,030	52,615	83,447
36th	1	308	693	1,078	2.45	\$13,363	25%	8,595	19,340	30,084	11,572	19,983	29,484	13,479	31,378	49,060	33,646	70,700	108,628
27th	1	330	743	1,155	2.45	\$13,363	10%	3,683	8,287	12,890	3,248	6,424	9,139	6,772	14,120	22,279	13,703	28,831	44,308
Parkwood	1	847	1,906	2,964	2.45	\$13,363	15%	14,174	31,893	49,611	3,215	9,191	15,728	4,872	9,636	13,708	22,262	50,720	79,047
<b>Southeast Corridor</b>																			
CPCC	3	1,300	2,926	4,551	2.45	\$13,363	15%	19,948	44,884	69,819	0	1,174	5,020	3,236	8,445	14,179	23,185	54,503	89,019
Matthews TOD	2	717	1,614	2,510	2.45	\$13,363	10%	7,335	16,503	25,671	0	1,566	4,130	4,241	8,842	12,665	11,576	26,911	42,467
Highway 51	2	773	1,740	2,706	2.45	\$13,363	15%	11,862	26,689	41,515	3,236	6,096	7,985	3,265	9,180	12,720	18,363	41,965	62,220
Independence Pointe	2	829	1,866	2,902	2.45	\$13,363	10%	8,481	19,082	29,683	2,084	3,995	3,995	3,810	10,573	15,882	14,374	33,650	49,560
Sardis North	2	930	2,091	3,253	2.45	\$13,363	20%	19,015	42,783	66,552	3,304	9,886	12,859	8,586	17,889	23,871	30,905	70,558	103,281
Village Lake	2	733	1,650	2,567	2.45	\$13,363	10%	7,502	16,879	26,256	0	885	2,617	1,488	5,519	8,273	8,989	23,283	37,146
Conference Drive	2	470	1,057	1,644	2.45	\$13,363	10%	4,804	10,809	16,813	0	0	1,844	35	3,692	9,846	4,839	14,501	28,503
Sharon Amity	2	559	1,257	1,955	2.45	\$13,363	10%	2,857	6,428	9,999	0	0	814	711	3,398	6,934	3,568	9,825	17,747
Amity Gardens	2	648	1,457	2,266	2.45	\$13,363	15%	19,870	44,706	69,543	0	7,899	16,804	2,258	13,009	29,683	22,127	65,615	116,031
Briar Creek	1	205	461	717	2.45	\$13,363	10%	1,048	2,358	3,669	630	1,793	3,212	1,665	3,300	4,669	3,343	7,451	11,549
Pecan	1	402	903	1,405	2.45	\$13,363	20%	8,213	18,480	28,747	6,661	13,199	18,676	9,068	21,714	33,777	23,942	53,392	81,200
Elizabeth	1	571	1,286	2,000	2.45	\$13,363	25%	29,224	65,754	102,284	8,184	18,176	26,163	8,326	16,499	23,345	45,735	100,429	151,792



CITY OF CHARLOTTE  
ESTIMATED DEVELOPMENT POTENTIAL  
FOR TRANSIT CORRIDORS ACTIVITY CENTERS

Exhibit 23  
Allocation of Projected Retail Growth by Station Area

	Mile Radius	Household Growth			Pop/ H'Hold	Per Capita Retail \$	Capture Rate	Retail Capture			Add'l Retail SF from Growth Allocated to Station			Add'l Retail SF from Growth Allocated to Nearby Stations			Total New Retail Space		
		08 - 15	15 - 25	25 - 35				2015	2025	2035	2015	2025	2035	2015	2025	2035	2015	2025	2035
<b>South Corridor</b>																			
I-485	3	764	1,719	2,673	2.45	\$13,363	20%	20,833	46,873	72,914	5,497	19,696	35,662	11,891	25,019	39,189	38,221	91,587	147,765
Sharon West	2	472	1,062	1,652	2.45	\$13,363	10%	4,828	10,862	16,897	2,760	6,497	10,496	5,934	15,860	26,930	13,522	33,219	54,323
Arrowood	2	646	1,454	2,262	2.45	\$13,363	10%	6,609	14,870	23,131	3,186	6,012	9,099	4,140	10,047	16,712	13,934	30,929	48,941
Archdale	2	576	1,296	2,016	2.45	\$13,363	10%	5,890	13,253	20,616	1,380	3,550	6,216	6,170	13,939	25,023	13,440	30,742	51,854
Tyvola	2	506	1,138	1,770	2.45	\$13,363	25%	12,929	29,090	45,251	7,460	19,818	39,811	23,465	53,374	91,597	43,854	102,281	176,659
Woodlawn	2	823	1,851	2,879	2.45	\$13,363	20%	16,828	37,862	58,897	1,255	5,924	18,070	24,791	57,808	91,170	42,874	101,595	168,138
Scaleybark	1	80	180	279	2.45	\$13,363	15%	1,225	2,756	4,287	6,289	13,238	18,434	6,700	17,345	30,287	14,213	33,339	53,007
New Bern	1	257	579	900	2.45	\$13,363	15%	3,947	8,880	13,813	5,758	12,902	16,734	11,848	22,036	28,703	21,554	43,818	59,250
South End	2	2,503	5,632	8,760	2.45	\$13,363	20%	85,333	191,998	298,664	22,261	35,225	41,116	16,063	34,854	46,890	123,657	262,077	386,670
<b>North Corridor</b>																			
Davidson	2	1,481	3,332	5,183	2.45	\$13,363	10%	15,147	34,080	53,014	4,050	6,268	8,319	3,754	7,221	9,354	22,794	47,754	71,817
Cornelius	2	2,219	4,993	7,767	2.45	\$13,363	15%	34,045	76,601	119,156	5,396	11,108	15,725	6,322	10,291	13,863	45,515	97,110	147,360
Caldwell Station	2	1,568	3,529	5,489	2.45	\$13,363	15%	24,060	54,134	84,209	2,062	6,965	14,745	0	0	0	26,122	61,099	98,954
Huntersville	2	1,487	3,347	5,206	2.45	\$13,363	10%	15,214	34,231	53,248	1,166	4,072	7,573	0	0	0	16,380	38,303	60,821
Bryton	3	3,235	7,280	11,324	2.45	\$13,363	30%	165,460	372,285	579,111	16,986	39,067	46,188	10,444	33,267	61,232	198,481	452,893	694,311
Eastfield	3	3,235	7,280	11,324	2.45	\$13,363	15%	82,730	186,143	289,555	2,196	9,022	17,624	13,150	28,719	45,883	99,241	226,446	347,156
Harris	2	1,712	3,853	5,994	2.45	\$13,363	25%	43,788	98,524	153,260	9,703	19,580	28,137	1,641	11,655	25,838	57,151	133,141	210,770
Derita	2	2,325	5,232	8,139	2.45	\$13,363	10%	23,785	53,517	83,248	0	0	1,282	0	0	0	23,785	53,517	84,530

Notes:

Radii based on station location and access and role retail is expected to play (neighborhood vs. community, entertainment destination, etc).  
 Growth is based on data provided by the City of Charlotte and includes "non-allocated" growth (i.e. those households not specifically allocated to a station area).  
 Persons/Household and per capita retail expenditures based on Claritas for Mecklenburg County.  
 That growth is spread throughout county by TAZ based on the fair share of growth that TAZ rec'd from 2000 to 2008.  
 Allocated growth, less that portion of growth already assigned to each TAZ, was then added to each station area to estimate total net household growth  
 Finally, demand potential from residents assigned to other station areas within the stated radius for each subject station was estimated utilizing stated captures.





CITY OF CHARLOTTE  
ESTIMATED DEVELOPMENT POTENTIAL--CORRIDORS AND CENTERS



Exhibit 24  
Estimated Development Potential by Selected Activity Centers  
2008 - 2035

Activity Center	Existing	New Office Growth			Total 08 - 35	New Retail Growth			Total 08 - 35		New Household Growth			Total 08 - 35	New Jobs/ HH Ratio
		08 - 15	15 - 25	25 - 35		08 - 15	15 - 25	25 - 35			08 - 15	15 - 25	25 - 35		
<b>Center City (inc. Midtown)</b>															
Space		1,807,761	2,585,404	2,550,164	6,943,329	193,699	258,556	248,580	700,835	Population	4,276	4,707	4,029	13,011	
Employees		5,947	8,505	8,389	22,840	484	646	621	1,752	Units	2,443	2,690	2,302	7,435	1.36
<b>Northlake</b>															
Space		304,245	832,046	865,771	2,002,062	179,890	255,542	254,549	689,980	Population	1,994	3,025	2,502	7,520	
Employees		1,001	2,737	2,848	6,586	450	639	636	1,725	Units	1,139	1,728	1,430	4,297	1.06
<b>University Research Park</b>															
Space		532,311	1,541,767	1,312,979	3,387,057	182,369	270,037	259,103	711,508	Population	1,759	2,772	2,276	6,806	
Employees		1,751	5,072	4,319	11,142	456	675	648	1,779	Units	1,005	1,584	1,300	3,889	1.57
<b>Southpark</b>															
Space		683,135	1,007,948	867,196	2,558,279	154,544	197,256	187,335	539,135	Population	989	1,213	1,196	3,398	
Employees		2,247	3,316	2,853	8,415	386	493	468	1,348	Units	565	693	683	1,941	2.16
<b>Cotswold</b>															
Space		102,205	183,900	139,056	425,161	44,188	63,895	61,831	169,913	Population	68	92	100	260	
Employees		336	605	457	1,399	110	160	155	425	Units	39	53	57	149	5.93
<b>Ballantyne</b>															
Space		1,635,280	2,942,401	2,224,891	6,802,571	148,296	220,053	189,306	557,656	Population	2,739	3,680	3,991	10,410	
Employees		5,379	9,679	7,319	22,377	371	550	473	1,394	Units	1,565	2,103	2,281	5,949	1.46
<b>Coliseum</b>															
Space		413,650	647,182	554,081	1,614,912	89,251	111,066	102,296	302,613	Population	1,073	1,189	995	3,256	
Employees		1,361	2,129	1,823	5,312	223	278	256	757	Units	613	679	568	1,861	1.39
<b>Whitehall</b>															
Space		1,551,187	2,426,932	2,077,803	6,055,922	204,442	268,020	245,334	717,796	Population	3,486	3,864	3,232	10,583	
Employees		5,103	7,983	6,835	19,921	511	670	613	1,794	Units	1,992	2,208	1,847	6,047	1.43
<b>Steele Creek</b>															
Space		103,412	161,795	138,520	403,728	110,150	121,974	104,429	336,553	Population	536	594	497	1,628	
Employees		340	532	456	1,328	275	305	261	841	Units	306	340	284	930	1.39
<b>Totals, All Activity Centers</b>															
Space		7,133,186	12,329,377	10,730,460	30,193,022	1,306,830	1,766,399	1,652,762	4,725,990	Units	9,668	12,078	10,753	32,499	1.45
<b>Totals, Mecklenburg County</b>															
Space		11,292,275	20,332,613	18,917,582	50,542,470	5,541,725	7,364,153	6,296,350	19,202,228		51,722	68,731	58,765	179,218	0.62
Capture		63%	61%	57%	60%				25%		18.7%	17.6%	18.3%	18.1%	
Historic Avg ('00 - '07)					66%			(less Northlake Mall)	20%					14.2%	



**CITY OF CHARLOTTE  
ESTIMATED DEMAND POTENTIAL  
FOR TRANSIT CORRIDORS & ACTIVITY CENTERS**

**Exhibit 25  
Estimated Development Potential Along Three Streetcar Lines**

Streetcar Line	Residential Growth			Population Growth			Office Growth			Retail Growth			Net New Employees		
	08 - '15	15 - 25	25 - 35	08 - '15	15 - 25	25 - 35	08 - '15	15 - 25	25 - 35	08 - '15	15 - 25	25 - 35	08 - '15	15 - 25	25 - 35
<b>Central</b>															
Outside of Elizabeth/Pecan	631	898	1,014	1,105	1,571	1,775	28,096	56,173	51,310	101,665	129,561	229,011	347	509	741
Cumulative	631	1,529	2,543	1,105	2,676	4,451	28,096	84,269	135,579	101,665	231,226	358,572	347	855	1,342
Inclusive of Elizabeth/Pecan															
Elizabeth	346	511	412	606	894	720	46,461	89,786	100,942	45,735	54,695	51,363	267	432	460
Pecan	390	477	412	682	835	720	17,870	48,974	55,059	23,942	29,450	27,807	119	235	251
Cumulative	1,367	3,254	5,091	2,393	5,694	8,909	92,427	287,360	494,671	171,342	385,048	591,564	732	1,908	3,106
Assessment:	<p>In the next 5 - 10 years, the greatest opportunities for redevelopment along the Central Avenue Streetcar Corridor will lie within the Central District, particularly around the Elizabeth Area and Pecan Station (Plaza/ Midwood), and extending east toward Briar Creek Road and Eastway Drive.</p> <p>Redevelopment of Eastland Mall will be critical to stimulating revitalization and new growth east of Eastway, given the lack of major anchors, parks, etc along the corridor, and the large, aging stock of rental apartments. Retail and office will be largely local-serving in nature, with a redeveloped Eastland Mall having the potential to draw shoppers from a much greater radius.</p>														
<b>Wilkinson</b>															
Outside of Wilkinson	603	698	917	1,056	1,222	1,604	189,301	225,632	216,848	45,889	56,468	100,286	737	883	964
Cumulative	603	1,302	2,218	1,056	2,278	3,882	189,301	414,933	631,781	45,889	102,357	156,754	737	1,621	2,470
Assessment:	<p>By far the greatest opportunity along Wilkinson Boulevard for development and redevelopment falls inside of Ashley Road, with demand for residential, office, and retail diminishing quickly approaching the airport. Bolstered by great accessibility to Center City &amp; I-77, cheap land, great views, and strong neighborhoods, this intown area of Wilkinson and Morehead can function as a price alternative to more established areas intown such as South End.</p> <p>Retail demand is tempered somewhat by the fractured trade area along Wilkinson, which is framed by interstates, the airport, and crossing rail lines. The further west of I-77 you move, the more local the office play becomes, with more regional opportunities existing closer to I-77. Residential represents a strong short- and long-term opportunity in the area.</p>														
<b>Beatties Ford</b>															
Outside of Beatties Ford	278	335	331	486	586	580	15,829	30,872	39,609	36,881	45,214	79,236	144	215	328
Cumulative	278	613	944	486	1,072	1,652	15,829	46,701	86,310	36,881	82,095	124,450	144	359	595
Assessment:	<p>Opportunities for Beatties Ford Road Streetcar Line are significantly tempered by the lack of available land for development and redevelopment, narrow parcel depths, and a lack of development momentum historically. Regardless, opportunities do exist for approximately 863 residential units in the coming 27 years, along with 82,000 square feet of office and 125,000 square feet of largely neighborhood-serving retail. Around I-85 opportunities do increase for highway-oriented retail</p> <p>Strongest redevelopment opportunities are between I-77 and Johnson C. Smith University, around the Little 5 Points area, and around the Beatties Ford/I-85 interchange. Product pricing and lease rates will be positioned below other intown areas such as South End, and the emerging NoDa, Plaza/Midwood, and Morehead corridors, with the corridor gaining ground over time.</p>														



CITY OF CHARLOTTE  
ESTIMATED DEVELOPMENT POTENTIAL  
FOR TRANSIT CORRIDORS & ACTIVITY CENTERS



Exhibit 26  
Estimated Development Potential by Station Area for the South Corridor  
2008 - 2035

2008 - 2015

Station Area	New					Cumulative				
	Office Square Feet	Retail Square Feet	Net New Employees	Residential Units	Net New Population	Office Square Feet	Retail Square Feet	Net Added Employees	Residential Units	Net Added Population
<b>Total Corridor</b>	<b>500,525</b>	<b>325,269</b>	<b>2,460</b>	<b>4,769</b>	<b>8,785</b>	<b>500,525</b>	<b>325,269</b>	<b>2,460</b>	<b>4,769</b>	<b>8,785</b>
South End Stations	186,731	123,657	923	1,883	3469	186,731	123,657	923	1,883	3,469
New Bern	37,083	21,554	176	532	981	37,083	21,554	176	532	981
Scaleybark	37,742	14,213	160	532	981	37,742	14,213	160	532	981
Woodlawn	37,742	42,874	231	78	144	37,742	42,874	231	78	144
Tyvola	140,860	43,854	573	375	691	140,860	43,854	573	375	691
Archdale	0	13,440	34	174	321	0	13,440	34	174	321
Arrowood	20,123	13,934	101	497	915	20,123	13,934	101	497	915
Sharon Road W	0	13,522	34	349	642	0	13,522	34	349	642
I-485/South Blvd.	40,246	38,221	228	349	642	40,246	38,221	228	349	642

2015 - 2025

Station Area	New					Cumulative				
	Office Square Feet	Retail Square Feet	Net New Employees	Residential Units	Net New Population	Office Square Feet	Retail Square Feet	Net Added Employees	Residential Units	Net Added Population
<b>Total Corridor</b>	<b>773,756</b>	<b>404,320</b>	<b>3,556</b>	<b>5,713</b>	<b>10,524</b>	<b>1,274,282</b>	<b>729,589</b>	<b>6,016</b>	<b>10,482</b>	<b>19,309</b>
South End Stations	247,619	138,420	1,161	1,405	2588	434,350	262,077	2,084	3,288	6,057
New Bern	47,235	22,264	211	666	1227	84,318	43,818	387	1,198	2,207
Scaleybark	70,852	19,126	281	591	1089	108,594	33,339	441	1,123	2,070
Woodlawn	106,643	58,721	498	294	542	144,385	101,595	729	372	686
Tyvola	180,844	58,427	741	626	1154	321,704	102,281	1,314	1,001	1,844
Archdale	8,100	17,302	70	276	508	8,100	30,742	103	450	829
Arrowood	22,041	16,995	115	477	878	42,164	30,929	216	973	1,793
Sharon Road W	15,070	19,698	99	477	878	15,070	33,219	133	825	1,520
I-485/South Blvd.	75,352	53,367	381	902	1661	115,597	91,587	609	1,251	2,304



CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS



Exhibit 26  
 Estimated Development Potential by Station Area for the South Corridor  
 2008 - 2035

2025 - 2035

Station Area	New					Cumulative				
	Office Square Feet	Retail Square Feet	Net New Employees	Residential Units	Net New Population	Office Square Feet	Retail Square Feet	Net Added Employees	Residential Units	Net Added Population
<b>Total Corridor</b>	<b>816,690</b>	<b>417,018</b>	<b>3,729</b>	<b>5,935</b>	<b>10,932</b>	<b>2,090,972</b>	<b>1,146,607</b>	<b>9,745</b>	<b>16,417</b>	<b>30,241</b>
South End Stations	223,566	124,593	1,047	953	1756	657,916	386,670	3,131	4,241	7,812
New Bern	78,919	15,432	298	382	704	163,236	59,250	685	1,580	2,911
Scaleybark	52,612	19,668	222	443	817	161,206	53,007	663	1,567	2,886
Woodlawn	171,026	66,543	729	770	1418	315,411	168,138	1,458	1,142	2,104
Tyvola	152,892	74,377	689	1,016	1871	474,596	176,659	2,003	2,017	3,716
Archdale	14,528	21,112	101	339	624	22,628	51,854	204	789	1,453
Arrowood	14,528	18,012	93	508	936	56,692	48,941	309	1,481	2,728
Sharon Road W	14,528	21,103	101	508	936	29,599	54,323	233	1,333	2,456
I-485/South Blvd.	94,090	56,178	450	1,016	1871	209,688	147,765	1,059	2,266	4,175



CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 26  
 Estimated Development Potential by Station Area for the South Corridor  
 2008 - 2035

Station Area	Total Growth			Pipeline Projects			Future Projects Growth		
	Employees	Households	Population	Employees	Households	Population	Employees	Households	Population
<b>Total Corridor</b>	<b>9,745</b>	<b>16,417</b>	<b>28,729</b>	<b>3,576</b>	<b>5,646</b>	<b>9,881</b>	<b>6,169</b>	<b>10,771</b>	<b>18,849</b>
South End Stations	3,131	4,241	7,422	2,374	3,047	5,332	757	1,194	2,089
New Bern	685	1,580	2,766	595	975	1,706	90	605	1,059
Scaleybark	663	1,567	2,742	606	924	1,617	57	643	1,125
Woodlawn	1,458	1,142	1,999	0	0	0	1,458	1,142	1,999
Tyvola	2,003	2,017	3,530	0	0	0	2,003	2,017	3,530
Archdale	204	789	1,380	0	0	0	204	789	1,380
Arrowood	309	1,481	2,592	0	700	1,225	309	781	1,367
Sharon Road W	233	1,333	2,333	0	0	0	233	1,333	2,333
I-485/South Blvd.	1,059	2,266	3,966	0	0	0	1,059	2,266	3,966

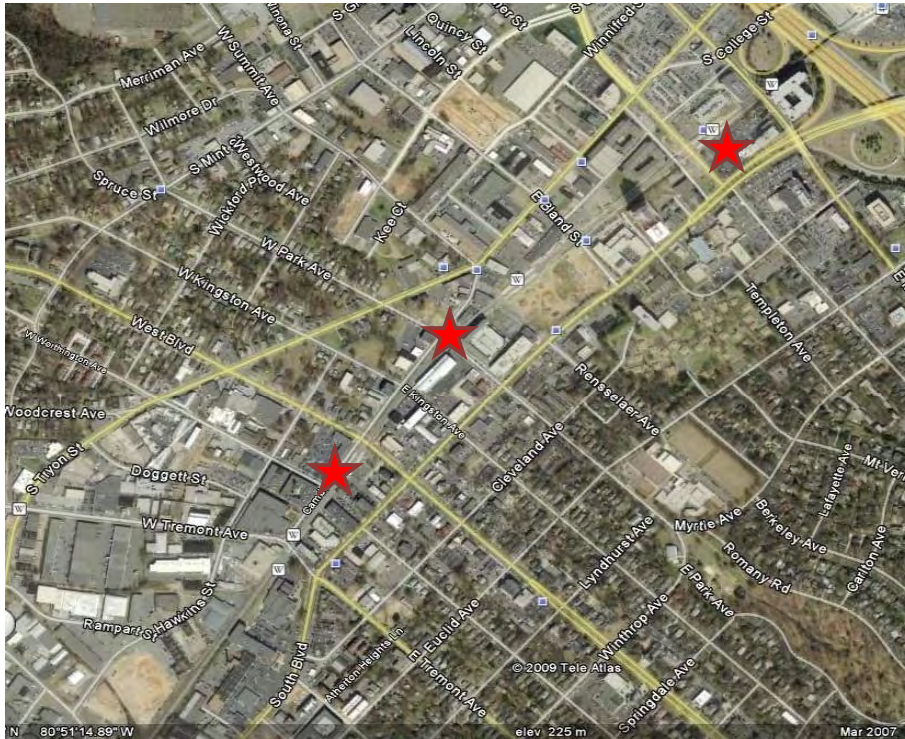
Station Area	Acres Net of Pipeline	New TSD Acres Needed Net Pipeline		
		M	R	E
<b>Total Corridor</b>	<b>490.5</b>	<b>161.5</b>	<b>279.0</b>	<b>50.0</b>
South End Stations	38.5	29.0	9.5	0.0
New Bern	19.0	0.0	19.0	0.0
Scaleybark	26.5	14.0	10.0	2.5
Woodlawn	57.0	30.0	18.0	9.0
Tyvola	108.0	53.0	29.0	26.0
Archdale	40.0	6.0	34.0	0.0
Arrowood	32.0	3.5	26.5	2.0
Sharon Road W	47.0	0.0	46.0	1.0
I-485/South Blvd.	122.5	26.0	87.0	9.5





CITY OF CHARLOTTE  
ESTIMATED DEVELOPMENT POTENTIAL  
FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 27  
Recommended Development and Land Use Program  
South Corridor--South End Stations



	Office	Retail	High Res
Total Estimated Growth	657,916	386,670	4,241
Previous Est (NA)	NA	NA	NA
Pipeline Projects	546,000	309,200	3,047
Remaining Growth	111,916	77,470	1,194

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	29.0	9.5	0.0

**What's Changed?**

Momentum has picked up significantly with numerous new residential, retail, and office properties developed, under construction, and proposed. Office market proving to be strong given quality of life in the area. South End increasingly competing w/ Center City.

**Key Considerations:**

- Strong access & lower land costs will allow South End to more effectively compete with Center City for office & residential development
- Great interstate access also a significant factor for office
- Demand sufficient to support pipeline projects
- Strengthen east-west connections to South Tryon to spur continued growth
- Parks and open space lacking in the South End area overall--focus on enhancing walkability

Allocated Growth	Office		Retail	Employment	High-Density Residential	Population
	Office	Retail				
Base Year				9645		2315
Increase 2008 - 2015	186,731	123,657		923	1,883	3,469
Increase 2015 - 2025	247,619	138,420		1,161	1,405	2,588
Increase 2025 - 2035	223,566	124,593		1,047	953	1,756
<b>Total</b>	<b>657,916</b>	<b>386,670</b>		<b>12,776</b>	<b>4,241</b>	<b>10,127</b>

Allocation by TAZ	11025		10143		10149	
	Emp	Pop	Emp	Pop	Emp	Pop
	3,674	1,207	2,438	581	3,533	527
	369	824	277	1,236	277	1,236
	464	615	348	922	348	922
	419	417	314	625	314	625
<b>Total</b>	<b>4,926</b>	<b>3,062</b>	<b>3,377</b>	<b>3,364</b>	<b>4,472</b>	<b>3,310</b>



CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 28  
 Recommended Development and Land Use Program  
 South Corridor--New Bern Station



	Office	Retail	High Res
Total Estimated Growth	163,236	59,250	1,580
<i>Previous Est (2003)</i>	<i>173,628</i>	<i>250,000</i>	<i>1,391</i>
Pipeline Projects	160,000	40,000	975
Remaining Growth	3,236	19,250	605

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	0.0	19.0	0.0

**What's Changed?**

Large asphalt plant removed and cleared off; additional residential and some retail added to station area. Area to west continues to struggle.

**Key Considerations:**

- Will benefit from South End expansion--residential first, then office & retail
- Opportunities for design offices/expansion west of tracks
- May need to consider program to purchase/consolidate properties
- Limited parcel depths tempers redevelopment of South Boulevard frontage
- Parks and open space lacking in the South End area overall
- Entry/gateway from I-77 should be enhanced

Allocated Growth					
	Office	Retail	Employment	High-Density Residential	Population
Base Year			1389		1282
Increase 2008 - 2015	37,083	21,554	176	532	981
Increase 2015 - 2025	47,235	22,264	211	666	1,227
Increase 2025 - 2035	78,919	15,432	298	382	704
<b>Total</b>	<b>163,236</b>	<b>59,250</b>	<b>2,074</b>	<b>1,580</b>	<b>4,193</b>

Allocation by TAZ					
11026		10186			
Emp	Pop	Emp	Pop	Emp	Pop
1,273	302	116	980		
167	885	9	47		
200	1,107	11	58		
283	635	15	33		
<b>1,924</b>	<b>2,929</b>	<b>150</b>	<b>1,118</b>	<b>0</b>	<b>0</b>





CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 29  
 Recommended Development and Land Use Program  
 South Corridor--Scaleybark Station



	Office	Retail	High Res
Total Estimated Growth	161,206	53,007	1,567
<i>Previous Est (2003)</i>	<i>165,360</i>	<i>50,000</i>	<i>927</i>
Pipeline Projects	80,000	15,000	924
Remaining Growth	81,206	38,007	643

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	14.0	10.0	2.5

**What's Changed?**

Queen Park being demolished, new street added and several significant property acquisitions underway--on hold for economy. Strong streetscaping along South Boulevard and highly visible station.

**Key Considerations:**

- Still benefits from "intown" character/scale
- Decent interstate access, although aesthetics need enhancing
- Demand sufficient to support pipeline projects
- As with most areas along South Corridor, parks/open space lacking
- Strong developers and relatively large parcels allow easier redevelopment

Allocated Growth					
	Office	Retail	Employment	High-Density Residential	Population
Base Year			2045		1361
Increase 2008 - 2015	37,742	14,213	160	532	981
Increase 2015 - 2025	70,852	19,126	281	591	1,089
Increase 2025 - 2035	52,612	19,668	222	443	817
<b>Total</b>	<b>161,206</b>	<b>53,007</b>	<b>2,708</b>	<b>1,567</b>	<b>4,247</b>

Allocation by TAZ					
11027		10199		10169	
Emp	Pop	Emp	Pop	Emp	Pop
746	18	409	199	890	1,144
96	559	48	279	16	93
169	621	84	310	28	103
133	466	67	233	22	78
<b>1,144</b>	<b>1,663</b>	<b>608</b>	<b>1,022</b>	<b>956</b>	<b>1,418</b>



CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 30  
 Recommended Development and Land Use Program  
 South Corridor--Woodlawn Station



	Office	Retail	High Res
Total Estimated Growth	315,411	168,138	1,142
<i>Previous Est (2003)</i>	<i>689,000</i>	<i>300,000</i>	<i>1,855</i>
Pipeline Projects	0	0	0
Remaining Growth	315,411	168,138	1,142

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	30.0	18.0	9.0

**What's Changed?**

Very little new investment. Large retail center struggling with tenanting. Flex space to west continues to underperform.

**Key Considerations:**

- Access to I-77 a plus, but needs to be aesthetically enhanced
- Large retail center must be redeveloped to open connections to South Boulevard
  - Consider incentives to secure green connections
- Areas west of station may necessitate proactive purchase & clear
- Secure acreage for parks/open space
- Continue investing to enhance walkability/connectivity

Allocated Growth					
	Office	Retail	Employment	High-Density Residential	Population
Base Year			1165		2
Increase 2008 - 2015	37,742	42,874	231	78	144
Increase 2015 - 2025	106,643	58,721	498	294	542
Increase 2025 - 2035	171,026	66,543	729	770	1,418
<b>Total</b>	<b>315,411</b>	<b>168,138</b>	<b>2,623</b>	<b>1,142</b>	<b>2,106</b>

Allocation by TAZ					
11068					
Emp	Pop	Emp	Pop	Emp	Pop
1,165	2				
231	137				
498	515				
729	1,347				
<b>2,623</b>	<b>2,001</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>





CITY OF CHARLOTTE  
ESTIMATED DEVELOPMENT POTENTIAL  
FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 31  
Recommended Development and Land Use Program  
South Corridor--Tyvola Station



	Office	Retail	High Res
Total Estimated Growth	474,596	176,659	2,017
Previous Est (2003)	909,480	250,000	1,855
Pipeline Projects	0	0	0
Remaining Growth	474,596	176,659	2,017

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	53.0	29.0	26.0

**What's Changed?**

Little new investment in area--retail continuing to struggle with more vacant spaces appearing

**Key Considerations:**

- Relatively strong regional access--focus on cleaning up Tyvola
- Station presence along South Boulevard non-existent--facilitate connections visually & physically
  - Consider buying out western side of South Boulevard south of station
- Again, areas west of station may necessitate proactive purchase & clear
- Secure acreage for parks/open space and enhance walkability of area
- Facilitate redevelopment of larger retail center and aging apartments to the rear--school can act as park for higher-density

Allocated Growth					
	Office	Retail	Employment	High-Density Residential	Population
Base Year			1141		507
Increase 2008 - 2015	140,860	43,854	573	375	691
Increase 2015 - 2025	180,844	58,427	741	626	1,154
Increase 2025 - 2035	152,892	74,377	689	1,016	1,871
<b>Total</b>	<b>474,596</b>	<b>176,659</b>	<b>3,144</b>	<b>2,017</b>	<b>4,223</b>

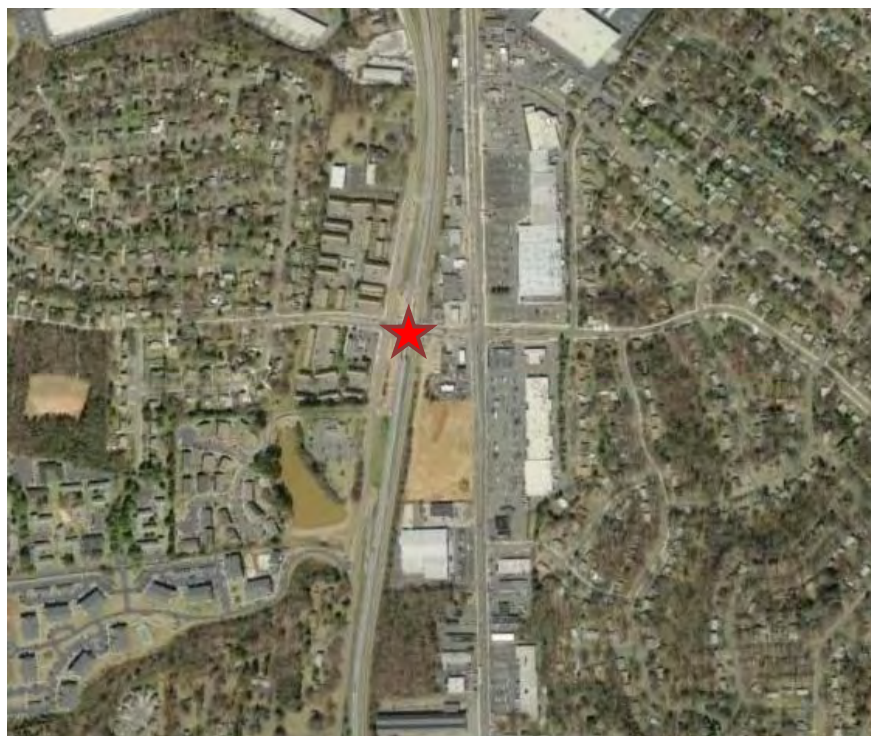
Allocation by TAZ					
11028					
Emp	Pop	Emp	Pop	Emp	Pop
1,141	507				
573	656				
741	1,096				
689	1,778				
<b>3,144</b>	<b>4,037</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>





CITY OF CHARLOTTE  
ESTIMATED DEVELOPMENT POTENTIAL  
FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 32  
Recommended Development and Land Use Program  
South Corridor--Archdale Station



	Office	Retail	High Res
Total Estimated Growth	22,628	51,854	789
Previous Est (2003)	0	100,000	795
Pipeline Projects	0	0	0
Remaining Growth	22,628	51,854	789

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	6.0	34.0	0.0

**What's Changed?**

Very little in past several years. Small parcels and poor regional access, combined with poorly performing retail and unattractive appearance limiting interest. Parcel sizes also very small and tough to assemble.

**Key Considerations:**

- Weak regional access--focus on facing South Boulevard
- Consider buying out narrow parcels along west side of South Boulevard and creating linear park/beautifying transit structure
- Again, areas west of station may necessitate proactive purchase & clear
- Secure acreage for parks/open space and enhance walkability of area
- Facilitate redevelopment of larger retail center and aging apartments to the rear--school can act as park for higher-density

Allocated Growth	Office		Retail		Employment	High-Density Residential	Population
	Office	Retail	Office	Retail			
Base Year					864		2134
Increase 2008 - 2015	0	13,440			34	174	321
Increase 2015 - 2025	8,100	17,302			70	276	508
Increase 2025 - 2035	14,528	21,112			101	339	624
<b>Total</b>	<b>22,628</b>	<b>51,854</b>			<b>1,068</b>	<b>789</b>	<b>3,587</b>

Allocation by TAZ					
11029		10509		10558	
Emp	Pop	Emp	Pop	Emp	Pop
225	145	511	671	128	1,318
13	122	13	122	7	61
28	193	28	193	14	96
40	237	40	237	20	119
<b>307</b>	<b>697</b>	<b>593</b>	<b>1,223</b>	<b>169</b>	<b>1,594</b>



CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 33  
 Recommended Development and Land Use Program  
 South Corridor--Arrowood Station



	Office	Retail	High Res
Total Estimated Growth	56,692	48,941	1,481
Previous Est (2003)	46,852	150,000	1,589
Pipeline Projects	0	0	700
Remaining Growth	56,692	48,941	781

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	3.5	26.5	2.0

**What's Changed?**

Some new residential has been developed and large-scale residential community under construction. Retail badly lagging and Wal-Mart has closed.

**Key Considerations:**

- Weak regional access and lack of visibility don't support much office or intense retail
- Consider continuation of linear park/greenway along South Boulevard as well as creation of park to west of station area.
- Enhancing walkability should be a major effort, including redevelopment of existing centers to more of a walkable format.
- Center on south side of Arrowood needs to be re-oriented to complement station and residential to south.

Allocated Growth					
	Office	Retail	Employment	High-Density Residential	Population
Base Year			638		2239
Increase 2008 - 2015	20,123	13,934	101	497	915
Increase 2015 - 2025	22,041	16,995	115	477	878
Increase 2025 - 2035	14,528	18,012	93	508	936
<b>Total</b>	<b>56,692</b>	<b>48,941</b>	<b>947</b>	<b>1,481</b>	<b>4,967</b>

Allocation by TAZ					
11030		10519			
Emp	Pop	Emp	Pop	Emp	Pop
291	498	347	1,741		
91	782	10	87		
103	751	11	83		
84	800	9	89		
<b>569</b>	<b>2,831</b>	<b>378</b>	<b>2,000</b>	<b>0</b>	<b>0</b>



CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 34  
 Recommended Development and Land Use Program  
 South Corridor--Sharon Road West Station



	Office	Retail	High Res
Total Estimated Growth	29,599	54,323	1,333
Previous Est (2003)	70,278	25,000	927
Pipeline Projects	0	0	700
Remaining Growth	29,599	54,323	633

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	0.0	46.0	1.0

**What's Changed?**

Very little new investment in the area has occurred. Retail and residential continues to age & car dealerships going dark--creates redevelopment opportunities but blighting in the short-term.

**Key Considerations:**

- Weak regional access and overabundance of aging apartments temper opportunities for office development. Neighborhood retail stronger play.
- Consider continuation of linear park/greenway along South Boulevard as well as creation of park to east of station area.
- Enhancing walkability should be a major effort, including creation of signature intersection along South Boulevard

Allocated Growth					
	Office	Retail	Employment	High-Density Residential	Population
Base Year			1142		3273
Increase 2008 - 2015	0	13,522	34	349	642
Increase 2015 - 2025	15,070	19,698	99	477	878
Increase 2025 - 2035	14,528	21,103	101	508	936
<b>Total</b>	<b>29,599</b>	<b>54,323</b>	<b>1,375</b>	<b>1,333</b>	<b>5,729</b>

Allocation by TAZ					
11031		10517			
Emp	Pop	Emp	Pop	Emp	Pop
837	79	305	3,194		
24	427	10	183		
69	584	30	250		
70	622	30	267		
<b>1,000</b>	<b>1,712</b>	<b>375</b>	<b>3,894</b>	<b>0</b>	<b>0</b>





CITY OF CHARLOTTE  
ESTIMATED DEVELOPMENT POTENTIAL  
FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 35  
Recommended Development and Land Use Program  
South Corridor--I-485 Station



	Office	Retail	High Res
Total Estimated Growth	209,688	147,765	2,266
Previous Est (NA)	NA	NA	NA
Pipeline Projects	0	0	0
Remaining Growth	209,688	147,765	2,266

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	26.0	87.0	9.5

**What's Changed?**

Area wasn't previously examined. Some new retail and Carolina Pavilion beginning to age with several large anchor spaces vacant. Too much parking in center and underutilized parcels west of South Boulevard

**Key Considerations:**

- Strong regional access and underutilized properties solid opportunities for development of office, more intense/tighter retail and higher-density residential (incredibly short commute to Ballantyne & Whitehall)
- Consider continuation of linear park/greenway along South Boulevard to terminating point at I-485. Tie into redevelopment of Carolina Pavilion in long-term
- Again, enhancing walkability and community creation should be a major effort.

Allocated Growth					
	Office	Retail	Employment	High-Density Residential	Population
Base Year			1247		63
Increase 2008 - 2015	40,246	38,221	228	349	642
Increase 2015 - 2025	75,352	53,367	381	902	1,661
Increase 2025 - 2035	94,090	56,178	450	1,016	1,871
<b>Total</b>	<b>209,688</b>	<b>147,765</b>	<b>2,306</b>	<b>2,266</b>	<b>4,238</b>

Allocation by TAZ					
11032		10537			
Emp	Pop	Emp	Pop	Emp	Pop
244	63	1,003	0		
160	427	68	183		
267	1,105	114	473		
315	1,245	135	533		
<b>985</b>	<b>2,839</b>	<b>1,321</b>	<b>1,190</b>	<b>0</b>	<b>0</b>



CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS



Exhibit 36  
 Estimated Development Potential by Station Area for the North Corridor  
 2008 - 2035

2008 - 2015

Station Area	New					Cumulative				
	Office Square Feet	Retail Square Feet	Net New Employees	Residential Units	Net New Population	Office Square Feet	Retail Square Feet	Net Added Employees	Residential Units	Net Added Population
<b>Total Corridor</b>	<b>616,368</b>	<b>489,470</b>	<b>3,089</b>	<b>3,356</b>	<b>5,579</b>	<b>616,368</b>	<b>489,470</b>	<b>3,089</b>	<b>3,356</b>	<b>5,579</b>
Derita	11,962	23,785	94	153	254	11,962	23,785	94	153	254
Harris	121,245	57,151	515	539	896	121,245	57,151	515	539	896
Eastfield	106,037	99,241	567	328	545	106,037	99,241	567	328	545
Hambright	192,534	198,481	1,073	740	1,231	192,534	198,481	1,073	740	1,231
Huntersville	26,140	16,380	121	234	388	26,140	16,380	121	234	388
Sam Furr	26,140	26,122	144	234	388	26,140	26,122	144	234	388
Cornelius	59,217	45,515	293	516	857	59,217	45,515	293	516	857
Davidson	73,092	22,794	283	613	1,019	73,092	22,794	283	613	1,019

2015 - 2025

Station Area	New					Cumulative				
	Office Square Feet	Retail Square Feet	Net New Employees	Residential Units	Net New Population	Office Square Feet	Retail Square Feet	Net Added Employees	Residential Units	Net Added Population
<b>Total Corridor</b>	<b>1,058,211</b>	<b>620,793</b>	<b>4,781</b>	<b>4,319</b>	<b>7,181</b>	<b>1,674,579</b>	<b>1,110,262</b>	<b>7,870</b>	<b>7,675</b>	<b>12,760</b>
Derita	0	29,731	71	111	185	11,962	53,517	164	264	439
Harris	130,845	75,990	589	556	924	252,090	133,141	1,104	1,094	1,820
Eastfield	251,540	127,206	1,088	765	1,272	357,578	226,446	1,655	1,093	1,818
Hambright	488,096	254,411	2,130	962	1,600	680,630	452,893	3,203	1,703	2,831
Huntersville	37,546	21,923	169	481	800	63,686	38,303	290	715	1,188
Sam Furr	75,092	34,977	318	495	822	101,232	61,099	461	728	1,210
Cornelius	37,546	51,595	240	555	922	96,763	97,110	533	1,070	1,780
Davidson	37,546	24,960	177	394	656	110,637	47,754	459	1,007	1,674





CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS



Exhibit 36  
 Estimated Development Potential by Station Area for the North Corridor  
 2008 - 2035

2025 - 2035

Station Area	New					Cumulative				
	Office Square Feet	Retail Square Feet	Net New Employees	Residential Units	Net New Population	Office Square Feet	Retail Square Feet	Net Added Employees	Residential Units	Net Added Population
<b>Total Corridor</b>	<b>1,164,545</b>	<b>605,456</b>	<b>5,077</b>	<b>4,943</b>	<b>8,217</b>	<b>2,839,124</b>	<b>1,715,718</b>	<b>12,947</b>	<b>12,618</b>	<b>20,977</b>
Derita	0	31,014	74	183	303	11,962	84,530	238	447	742
Harris	134,282	77,629	604	487	809	386,372	210,770	1,708	1,581	2,629
Eastfield	284,307	120,709	1,175	920	1,530	641,885	347,156	2,830	2,013	3,347
Hambright	538,746	241,418	2,257	1,217	2,024	1,219,376	694,311	5,460	2,920	4,854
Huntersville	41,442	22,518	183	559	929	105,128	60,821	473	1,274	2,117
Sam Furr	82,884	37,855	349	745	1,239	184,116	98,954	810	1,473	2,449
Cornelius	41,442	50,250	249	459	764	138,205	147,360	782	1,530	2,543
Davidson	41,442	24,063	187	373	619	152,079	71,817	646	1,380	2,294



CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS



Exhibit 36  
 Estimated Development Potential by Station Area for the North Corridor  
 2008 - 2035

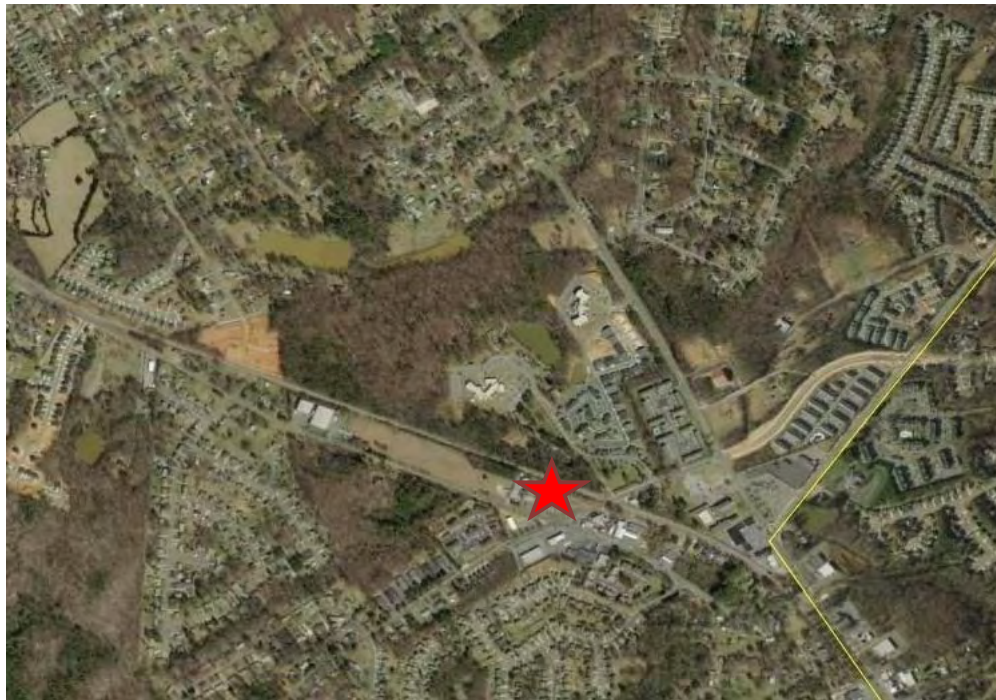
Station Area	Total Growth			Pipeline Projects			Future Projects Growth		
	Emp.	H' Holds	Population	Emp	H' Holds	Population	Emp	H' Holds	Population
<b>Total Corridor</b>	<b>12,947</b>	<b>12,618</b>	<b>20,977</b>	<b>10,777</b>	<b>8,479</b>	<b>14,838</b>	<b>2,170</b>	<b>4,139</b>	<b>6,139</b>
Derita	238	447	742	0	0	0	238	447	742
Harris	1,708	1,581	2,629	2,532	2,660	4,655	-824	-1,079	-2,026
Eastfield	2,830	2,013	3,347	0	926	1,621	2,830	1,087	1,726
Hambright	5,460	2,920	4,854	6,709	2,850	4,988	-1,250	70	-133
Huntersville	473	1,274	2,117	176	0	0	297	1,274	2,117
Sam Furr	810	1,473	2,449	612	903	1,579	199	571	870
Cornelius	782	1,530	2,543	748	1,140	1,995	34	390	548
Davidson	646	1,380	2,294	0	0	0	646	1,380	2,294

Station Area	Total Acres Required	Acres		
		M	R	E
<b>Total Corridor</b>	<b>296</b>	<b>48</b>	<b>196</b>	<b>53</b>
Derita	33	11	22	0
Harris	0	0	0	0
Eastfield	90	28	29	33
Hambright	0	0	0	0
Huntersville	69	5	59	5
Sam Furr	32	0	28	4
Cornelius	16	0	13	3
Davidson	58	4	45	9



CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 37  
 Recommended Development and Land Use Program  
 North Corridor--Derita Station



	Office	Retail	High Res
Total Estimated Growth	11,962	84,530	447
<i>Previous Est (05/06)</i>	<i>29,011</i>	<i>69,470</i>	<i>1,070</i>
Pipeline Projects	0	0	0
Remaining Growth	11,962	84,530	447

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	10.5	22.0	0.0

**What's Changed?**

Area experiencing relatively low-density infill housing, most of which is considered affordable. Retail is suffering as grocery tenant left station area for newer center to the south.

**Key Considerations:**

- Limited access regionally (improves over time), and moderate incomes temper office and retail opportunities to more neighborhood-serving uses.
- Parcel assemblage issues may also temper redevelopment potential.
- Area does have more of a neighborhood scale which can be enhanced to spur redevelopment and intensification.
- Enhance pedestrian connectivity in the area to maximize value creation.

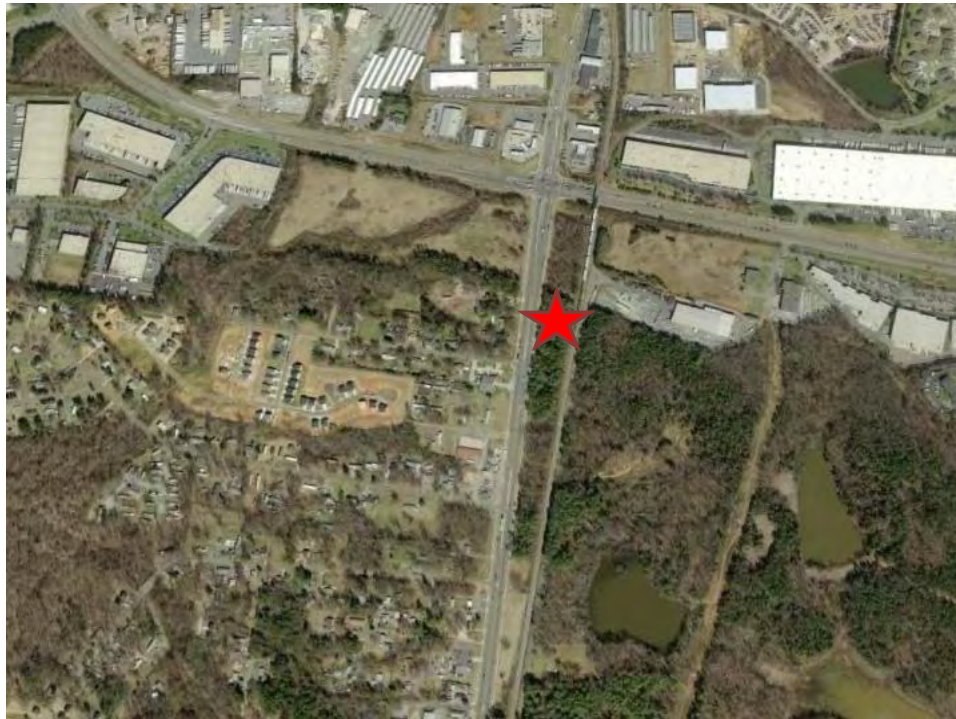
Allocated Growth					
	Office	Retail	Employment	High-Density Residential	Population
Base Year			412		2764
Increase 2008 - 2015	11,962	23,785	94	153	254
Increase 2015 - 2025	0	29,731	71	111	185
Increase 2025 - 2035	0	31,014	74	183	303
<b>Total</b>	<b>11,962</b>	<b>84,530</b>	<b>650</b>	<b>447</b>	<b>3,506</b>

Allocation by TAZ					
11044		10241		10268	
Emp	Pop	Emp	Pop	Emp	Pop
193	295	186	1,927	33	542
40	107	40	107	20	54
30	78	30	78	15	39
31	128	31	128	16	64
<b>293</b>	<b>608</b>	<b>286</b>	<b>2,240</b>	<b>83</b>	<b>698</b>



CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 38  
 Recommended Development and Land Use Program  
 North Corridor--Harris Station



	Office	Retail	High Res
Total Estimated Growth	386,372	210,770	1,581
<i>Previous Est (05/06)</i>	<i>561,304</i>	<i>139,848</i>	<i>993</i>
Pipeline Projects	578,000	361,500	2,660
Remaining Growth	-191,628	-150,730	-1,079

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	0.0	0.0	0.0

**What's Changed?**

Little new development has occurred in the area over the past few years. Griffith Lakes is still on the drawing boards, although development has yet to commence. Northlake Mall and completion of I-485 segment offer competition for commercial and residential uses going forward.

**Key Considerations:**

- While station area has relatively good access, other sites becoming available in next decade offer competitive advantages for office and retail uses.
- Griffith Lakes plan will likely be flexible to adapt to market trends and conditions. Zoning in place should more than satisfy demand with increasing amount of residential likely being more conventional.
- Further enhancement of area as walkable should occur off-site of Griffith Lakes to complement on-site investments planned.

Allocated Growth	Office		Retail	Employment	High-Density Residential	Population
	Office	Retail				
Base Year				1191		819
Increase 2008 - 2015	121,245	57,151		515	539	896
Increase 2015 - 2025	130,845	75,990		589	556	924
Increase 2025 - 2035	134,282	77,629		604	487	809
<b>Total</b>	<b>386,372</b>	<b>210,770</b>		<b>2,899</b>	<b>1,581</b>	<b>3,448</b>

Allocation by TAZ					
11049		10247		10245	
Emp	Pop	Emp	Pop	Emp	Pop
363	2	582	569	246	248
190	330	190	330	163	283
217	340	217	340	186	292
223	298	223	298	191	256
<b>992</b>	<b>970</b>	<b>1,211</b>	<b>1,537</b>	<b>785</b>	<b>1,078</b>





CITY OF CHARLOTTE  
ESTIMATED DEVELOPMENT POTENTIAL  
FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 39  
Recommended Development and Land Use Program  
North Corridor--Eastfield Station



	Office	Retail	High Res
Total Estimated Growth	641,885	347,156	2,013
<i>Previous Est (05/06)</i>	<i>617,071</i>	<i>124,836</i>	<i>982</i>
Pipeline Projects	0	0	926
Remaining Growth	641,885	347,156	1,087

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	28.0	29.0	33.0

**What's Changed?**

I-485 has been completed to NC 115 and the schedule for the remaining portion east to I-85 appears to have been accelerated. Gandy Communities has also purchased additional land closer to the station area for TOD development and construction of Bryton has begun.

**Key Considerations:**

- Area will benefit significantly from I-485 and has potential to evolve into significant office core. Regional retail opportunities also exist, although Bryton may capture greater share of that growth.
- Creation of more walkable environment will be important as will securing open space/parks. Both can be accomplished through development of larger parcels in area.
- Abundant greenfields in area keep development costs down and allow for development more quickly relative to other station areas.

Allocated Growth					
	Office	Retail	Employment	High-Density Residential	Population
Base Year			2334		1418
Increase 2008 - 2015	106,037	99,241	567	328	545
Increase 2015 - 2025	251,540	127,206	1,088	765	1,272
Increase 2025 - 2035	284,307	120,709	1,175	920	1,530
<b>Total</b>	<b>641,885</b>	<b>347,156</b>	<b>5,164</b>	<b>2,013</b>	<b>4,765</b>

Allocation by TAZ					
10251		10253		10252	
Emp	Pop	Emp	Pop	Emp	Pop
2,285	40	49	1,365	0	13
209	201	328	316	60	57
401	469	630	737	115	134
433	564	680	886	124	161
<b>3,328</b>	<b>1,273</b>	<b>1,688</b>	<b>3,303</b>	<b>298</b>	<b>365</b>





CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 40  
 Recommended Development and Land Use Program  
 North Corridor--Hambricht Station



	Office	Retail	High Res
Total Estimated Growth	1,219,376	694,311	2,920
<i>Previous Est (05/06)</i>	NA	NA	NA
Pipeline Projects	1,500,000	1,000,000	2,850
Remaining Growth	-280,624	-305,689	70

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	0.0	0.0	0.0

**What's Changed?**

I-485 has been completed to NC 115 and the schedule for the remaining portion east to I-85 appears to have been accelerated. Bryton infrastructure is underway.

**Key Considerations:**

- As noted, area will benefit significantly from I-485 and has potential to evolve into significant office core. Regional retail opportunities also exist given strong interstate access via I-485 and I-77.
- Creation of more walkable environment will be important as will securing open space/parks. Both can be accomplished through development of larger parcels in area.
- Abundant greenfields in area keep development costs down and allow for development more quickly relative to other station areas.

Allocated Growth					
	Office	Retail	Employment	High-Density Residential	Population
Base Year			327		27
Increase 2008 - 2015	192,534	198,481	1,073	740	1,231
Increase 2015 - 2025	488,096	254,411	2,130	962	1,600
Increase 2025 - 2035	538,746	241,418	2,257	1,217	2,024
<b>Total</b>	<b>1,219,376</b>	<b>694,311</b>	<b>5,787</b>	<b>2,920</b>	<b>4,881</b>

Allocation by TAZ					
11050		10752			
Emp	Pop	Emp	Pop	Emp	Pop
327	22	0	5		
904	1,036	226	259		
1,793	1,347	448	337		
1,901	1,704	475	426		
<b>4,925</b>	<b>4,110</b>	<b>1,149</b>	<b>1,027</b>	<b>0</b>	<b>0</b>



CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 41  
 Recommended Development and Land Use Program  
 North Corridor--Huntersville Station



	Office	Retail	High Res
Total Estimated Growth	105,128	60,821	1,274
<i>Previous Est (05/06)</i>	<i>90,184</i>	<i>55,774</i>	<i>832</i>
Pipeline Projects	45,000	15,000	0
Remaining Growth	60,128	45,821	1,274

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	5.0	58.5	5.0

**What's Changed?**

Vermillion continues to grow, albeit at a more modest pace. Areas east of I-77 in Huntersville seeing less activity than areas along I-77 and to the west.

**Key Considerations:**

- New museum, office, and retail project being developed in Downtown.
- Station area features limited visibility and moderate access, tempering opportunities for significant office and retail development.
- Small town atmosphere should lend well to fostering sense of place and pedestrian-oriented environment.
- Residential opportunities are the strongest and should support more active downtown area.

Allocated Growth					
	Office	Retail	Employment	High-Density Residential	Population
Base Year			869		2225
Increase 2008 - 2015	26,140	16,380	121	234	388
Increase 2015 - 2025	37,546	21,923	169	481	800
Increase 2025 - 2035	41,442	22,518	183	559	929
<b>Total</b>	<b>105,128</b>	<b>60,821</b>	<b>1,342</b>	<b>1,274</b>	<b>4,342</b>

Allocation by TAZ					
11051		10773		10777	
Emp	Pop	Emp	Pop	Emp	Pop
299	275	84	1,359	486	591
70	225	19	61	38	123
98	463	27	126	53	253
106	538	29	147	58	293
<b>573</b>	<b>1,501</b>	<b>159</b>	<b>1,693</b>	<b>635</b>	<b>1,260</b>





CITY OF CHARLOTTE  
ESTIMATED DEVELOPMENT POTENTIAL  
FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 42  
Recommended Development and Land Use Program  
North Corridor--Sam Furr Station



	Office	Retail	High Res
Total Estimated Growth	184,116	98,954	1,473
Previous Est (05/06)	27,320	98,114	1,557
Pipeline Projects	130,000	100,000	903
Remaining Growth	54,116	-1,046	571

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	0.0	28.0	3.5

**What's Changed?**

Mostly greenfield residential development occurring along Highway 115, including Caldwell Station community to the west. Limited commercial development thus far in the area.

**Key Considerations:**

- Station location will temper office and retail opportunities given limited access and lack of east-west thoroughfares.
- Large properties should allow for unified development and creation of a sense of place with a pedestrian scale without significant public involvement.

Allocated Growth					
	Office	Retail	Employment	High-Density Residential	Population
Base Year			1145		2434
Increase 2008 - 2015	26,140	26,122	144	234	388
Increase 2015 - 2025	75,092	34,977	318	495	822
Increase 2025 - 2035	82,884	37,855	349	745	1,239
<b>Total</b>	<b>184,116</b>	<b>98,954</b>	<b>1,955</b>	<b>1,473</b>	<b>4,883</b>

Allocation by TAZ					
11052		10758		10781	
Emp	Pop	Emp	Pop	Emp	Pop
83	260	209	10	853	2,164
61	164	61	164	30	82
134	346	134	346	67	173
147	522	147	522	73	261
<b>424</b>	<b>1,291</b>	<b>550</b>	<b>1,041</b>	<b>1,024</b>	<b>2,680</b>



CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 43  
 Recommended Development and Land Use Program  
 North Corridor--Cornelius Station



	Office	Retail	High Res
Total Estimated Growth	138,205	147,360	1,530
Previous Est (05/06)	24,524	328,421	974
Pipeline Projects	100,000	200,000	1,140
Remaining Growth	38,205	-52,640	390

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	0.0	13.0	2.5

**What's Changed?**

Development of Antiquity is underway with the crossing of NC 115 and the rail line occurring later this year. Most of the development has been residential with commercial not becoming viable until access is completed across NC 115.

**Key Considerations:**

- Moderate access given distance from I-77 tempers opportunities for retail and office uses.
- Quality town atmosphere enhances attractiveness for local-serving office and retail uses, as well as higher-intensity residential uses.
- Amount of retail in Antiquity may be too high, although flexibility in site plan accommodates for adjustments to development program.

Allocated Growth	Office		Retail	Employment	High-Density Residential	Population
	Office	Retail				
Base Year				1438		4640
Increase 2008 - 2015	59,217	45,515		293	516	857
Increase 2015 - 2025	37,546	51,595		240	555	922
Increase 2025 - 2035	41,442	50,250		249	459	764
<b>Total</b>	<b>138,205</b>	<b>147,360</b>		<b>2,220</b>	<b>1,530</b>	<b>7,183</b>

Allocation by TAZ					
11053		10794		10796	
Emp	Pop	Emp	Pop	Emp	Pop
24	35	702	1,823	712	2,782
154	451	77	226	77	226
126	485	63	243	63	243
131	402	65	201	65	201
<b>436</b>	<b>1,374</b>	<b>908</b>	<b>2,492</b>	<b>918</b>	<b>3,451</b>





CITY OF CHARLOTTE  
ESTIMATED DEVELOPMENT POTENTIAL  
FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 44  
Recommended Development and Land Use Program  
North Corridor--Davidson Station



	Office	Retail	High Res
Total Estimated Growth	152,079	71,817	1,380
<i>Previous Est (05/06)</i>	0	95,200	414
Pipeline Projects	0	0	0
Remaining Growth	152,079	71,817	1,380

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	4.0	45.0	8.5

**What's Changed?**

A fair amount of growth has occurred to the west of the station area along Griffith Street, including retail, residential, and institutional uses. The station area itself has largely remained unchanged.

**Key Considerations:**

- Relatively good access to I-77, combined with high quality of life create opportunities for smaller office, retail uses as well as significant infill residential uses.
- Highly walkable environment should require little infrastructure, with possible exception of infrastructure west of station itself.
- Limited amount of available land for redevelopment tempers market opportunities although will likely push prices higher, creating greater demand for attached vs. detached product.

Allocated Growth					
	Office	Retail	Employment	High-Density Residential	Population
Base Year			1119		2890
Increase 2008 - 2015	73,092	22,794	283	613	1,019
Increase 2015 - 2025	37,546	24,960	177	394	656
Increase 2025 - 2035	41,442	24,063	187	373	619
<b>Total</b>	<b>152,079</b>	<b>71,817</b>	<b>1,765</b>	<b>1,380</b>	<b>5,184</b>

Allocation by TAZ					
10804		10803			
Emp	Pop	Emp	Pop	Emp	Pop
516	716	603	2,174		
238	858	59	214		
149	552	37	138		
157	522	39	130		
<b>1,060</b>	<b>2,648</b>	<b>739</b>	<b>2,657</b>	<b>0</b>	<b>0</b>





CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS



Exhibit 45  
 Estimated Development Potential by Station Area for the Northeast Corridor  
 2008 - 2035

2008 - 2015

Station Area	New					Cumulative				
	Office Square Feet	Retail Square Feet	Net New Employees	Residential Units	Net New Population	Office Square Feet	Retail Square Feet	Net Added Employees	Residential Units	Net Added Population
<b>Total Corridor</b>	<b>1,602,234</b>	<b>560,348</b>	<b>6,671</b>	<b>3,218</b>	<b>5,928</b>	<b>1,602,234</b>	<b>560,348</b>	<b>6,671</b>	<b>3,218</b>	<b>5,928</b>
Parkwood	22,015	22,262	128	227	418	22,015	22,262	128	227	418
27th Street	21,326	13,703	104	340	627	21,326	13,703	104	340	627
36th Street	37,698	33,646	208	567	1,045	37,698	33,646	208	567	1,045
Sugar Creek	4,265	25,030	77	0	0	4,265	25,030	77	0	0
Old Concord Rd	0	28,646	72	0	0	0	28,646	72	0	0
Tom Hunter	0	15,233	38	0	0	0	15,233	38	0	0
Univ City Blvd	119,641	220,505	945	626	1,152	119,641	220,505	945	626	1,152
McCullough	154,920	36,181	600	626	1,152	154,920	36,181	600	626	1,152
JW Clay Blvd	96,894	32,375	400	452	832	96,894	32,375	400	452	832
UNC Charlotte	0	0	0	0	0	0	0	0	0	0
Mallard Creek Church	1,145,476	37,707	3,862	278	512	1,145,476	37,707	3,862	278	512
I-485/N. Tryon	0	95,058	238	102	188	0	95,058	238	102	188

2015 - 2025

Station Area	New					Cumulative				
	Office Square Feet	Retail Square Feet	Net New Employees	Residential Units	Net New Population	Office Square Feet	Retail Square Feet	Net Added Employees	Residential Units	Net Added Population
<b>Total Corridor</b>	<b>635,912</b>	<b>621,366</b>	<b>3,645</b>	<b>3,927</b>	<b>7,233</b>	<b>2,238,146</b>	<b>1,181,714</b>	<b>10,317</b>	<b>7,145</b>	<b>13,161</b>
Parkwood	51,171	28,458	239	475	875	73,186	50,720	368	702	1,293
27th Street	36,551	15,128	158	396	729	57,877	28,831	262	736	1,356
36th Street	43,861	37,054	237	554	1,020	81,559	70,700	445	1,121	2,065
Sugar Creek	14,620	27,585	117	158	292	18,886	52,615	194	158	292
Old Concord Rd	0	35,169	88	104	192	0	63,815	160	104	192
Tom Hunter	0	15,501	39	104	192	0	30,734	77	104	192
Univ City Blvd	63,662	247,349	828	418	769	183,304	467,854	1,773	1,043	1,922
McCullough	122,427	33,233	486	256	472	277,347	69,414	1,086	882	1,624
JW Clay Blvd	156,707	27,928	585	522	962	253,601	60,304	985	974	1,794
UNC Charlotte	0	0	0	209	385	0	0	0	209	385
Mallard Creek Church	97,942	41,136	425	465	856	1,243,417	78,843	4,287	743	1,369
I-485/N. Tryon	48,971	112,824	443	266	490	48,971	207,883	681	368	678



CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS



Exhibit 45  
 Estimated Development Potential by Station Area for the Northeast Corridor  
 2008 - 2035

2025 - 2035

Station Area	New					Cumulative				
	Office Square Feet	Retail Square Feet	Net New Employees	Residential Units	Net New Population	Office Square Feet	Retail Square Feet	Net Added Employees	Residential Units	Net Added Population
<b>Total Corridor</b>	<b>830,470</b>	<b>633,308</b>	<b>4,315</b>	<b>4,398</b>	<b>8,102</b>	<b>3,068,617</b>	<b>1,815,021</b>	<b>14,632</b>	<b>11,543</b>	<b>21,263</b>
Parkwood	55,671	28,327	254	437	805	128,857	79,047	621	1,139	2,097
27th Street	39,765	15,477	169	291	536	97,642	44,308	432	1,027	1,892
36th Street	47,718	37,928	252	510	939	129,277	108,628	697	1,631	3,004
Sugar Creek	15,906	30,832	129	218	402	34,792	83,447	323	377	694
Old Concord Rd	33,570	43,194	218	343	632	33,570	107,009	378	448	825
Tom Hunter	33,570	16,687	152	343	632	33,570	47,421	229	448	825
Univ City Blvd	87,283	248,282	908	411	756	270,587	716,137	2,680	1,454	2,678
McCullough	134,282	32,876	524	204	376	411,629	102,290	1,610	1,086	2,000
JW Clay Blvd	181,281	26,522	663	684	1,261	434,881	86,825	1,648	1,658	3,055
UNC Charlotte	0	0	0	204	376	0	0	0	413	761
Mallard Creek Church	100,711	40,747	433	274	504	1,344,129	119,590	4,720	1,017	1,873
I-485/N. Tryon	100,711	112,436	612	478	881	149,682	320,318	1,293	846	1,559



CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS



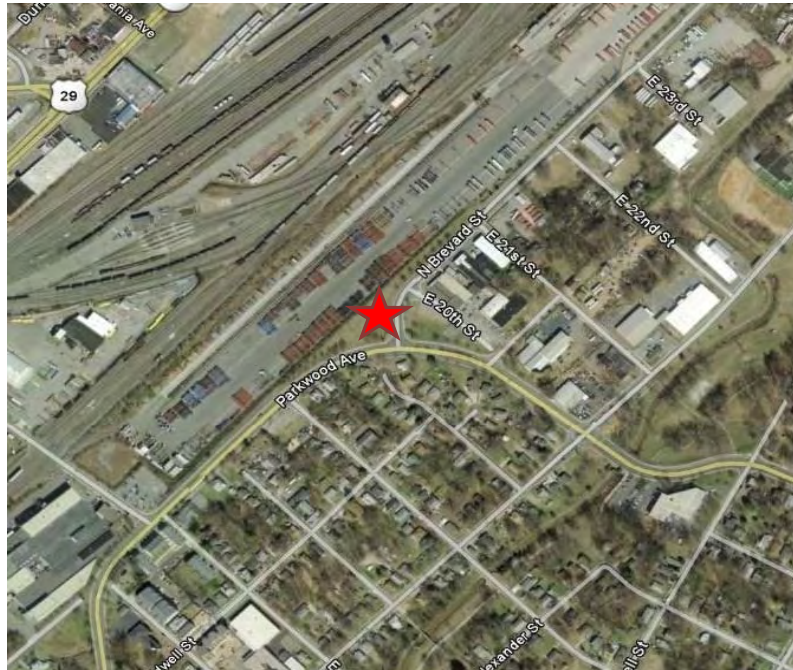
Exhibit 45  
 Estimated Development Potential by Station Area for the Northeast Corridor  
 2008 - 2035

Station Area	Total Growth			Pipeline Projects			Future Projects Growth		
	Employees	Households	Population	Employees	Households	Population	Employees	Households	Population
<b>Total Corridor</b>	<b>14,632</b>	<b>11,543</b>	<b>20,200</b>	<b>2,665</b>	<b>1,451</b>	<b>2,539</b>	<b>11,967</b>	<b>10,092</b>	<b>17,661</b>
Parkwood	621	1,139	1,992	0	86	150	621	1,053	1,843
27th Street	432	1,027	1,798	112	190	333	320	837	1,465
36th Street	697	1,631	2,854	0	119	208	697	1,512	2,646
Sugar Creek	323	377	659	0	0	0	323	377	659
Old Concord Rd	378	448	783	0	0	0	378	448	783
Tom Hunter	229	448	783	0	0	0	229	448	783
Univ City Blvd	2,680	1,454	2,544	1,828	684	1,197	853	770	1,347
McCullough	1,610	1,086	1,900	0	372	652	1,610	714	1,249
JW Clay Blvd	1,648	1,658	2,902	0	0	0	1,648	1,658	2,902
UNC Charlotte	0	413	723	0	0	0	0	413	723
Mallard Creek Church	4,720	1,017	1,779	725	0	0	3,996	1,017	1,779
I-485/N. Tryon	1,293	846	1,481	0	0	0	1,293	846	1,481

Station Area	Acres Net of Pipeline	New TSD Acres Needed Net Pipeline		
		M	R	E
<b>Total Corridor</b>	<b>472.0</b>	<b>198.0</b>	<b>127.0</b>	<b>147.0</b>
Parkwood	45.0	41.0	2.0	2.0
27th Street	33.5	0.0	29.0	4.5
36th Street	98.5	34.0	4.5	60.0
Sugar Creek	21.0	8.0	13.0	0.0
Old Concord Rd	36.0	22.0	14.0	0.0
Tom Hunter	25.5	12.0	13.0	0.5
Univ City Blvd	72.5	27.0	19.0	26.5
McCullough	51.0	20.0	6.5	24.5
JW Clay Blvd	89.0	34.0	26.0	29.0
UNC Charlotte	21.0	0.0	21.0	0.0
Mallard Creek Church	115.0	22.0	13.0	80.0
I-485/N. Tryon	76.0	41.0	29.0	6.0



Exhibit 46  
 Recommended Development and Land Use Program  
 Northeast Corridor--Parkwood Station



	Office	Retail	High Res
Total Estimated Growth	128,857	79,047	1,082
Previous Est (05/06)	222,679	22,381	263
Pipeline Projects	0	0	86
Remaining Growth	128,857	79,047	996

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	41.0	0.0	2.0

**What's Changed?**

North Davidson Corridor continues to evolve. Alpha Mill to the south opening up area to Center City and NoDa continues to gain momentum.

**Key Considerations:**

- Great access to Center City with decent freeway access--could be attractive for smaller office users.
- Large parcels north of Parkwood good for redevelopment with park space already present.
- Lack of decent retail in area an opportunity for neighborhood center at North Davidson
- Again, emphasis on enhancing walkability and community creation should be major effort.

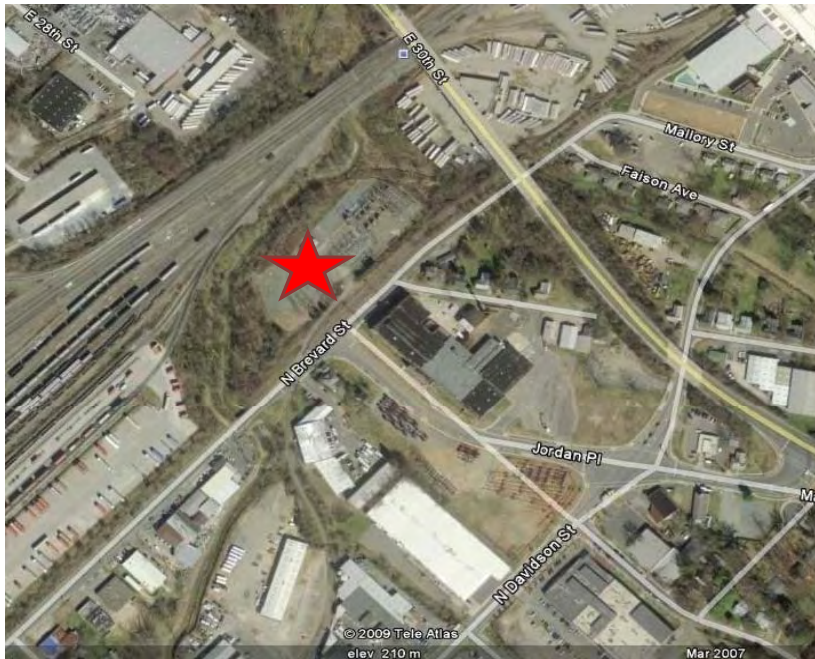
Allocated Growth	Office		Employment	High-Density Residential	Population
	Office	Retail			
Base Year			864		676
Increase 2008 - 2015	22,015	22,262	128	216	397
Increase 2015 - 2025	51,171	28,458	239	451	831
Increase 2025 - 2035	55,671	28,327	254	415	764
<b>Total</b>	<b>128,857</b>	<b>79,047</b>	<b>1,485</b>	<b>1,082</b>	<b>2,668</b>

Allocation by TAZ					
10057		10061			
Emp	Pop	Emp	Pop	Emp	Pop
752	653	112	23		
51	151	77	226		
96	316	144	474		
102	291	152	436		
<b>1,001</b>	<b>1,410</b>	<b>485</b>	<b>1,159</b>	<b>0</b>	<b>0</b>





Exhibit 47  
 Recommended Development and Land Use Program  
 Northeast Corridor--27th Street Station



	Office	Retail	High Res
Total Estimated Growth	97,642	44,308	976
Previous Est (05/06)	129,443	45,481	904
Pipeline Projects	31,000	9,000	190
Remaining Growth	66,642	35,308	786

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	0.0	26.5	4.5

**What's Changed?**

North Davidson Corridor continues to evolve. 28th RO across Davidson with retail & residential. NoDa spreading south along North Davidson.

**Key Considerations:**

- Access to Center City/freeway system limited, so office and retail opportunities will be local-serving and smaller in scale.
- Significant parcel sizes allow easy assembly and redevelopment (brownfields? already present).
- Station area not highly visible--enhance visibility and open up with park/greener space
- Again, emphasis on enhancing walkability and community creation should be major effort.

Allocated Growth			Employment	High-Density Residential	Population
	Office	Retail			
Base Year			510		1161
Increase 2008 - 2015	21,326	13,703	104	323	596
Increase 2015 - 2025	36,551	15,128	158	376	692
Increase 2025 - 2035	39,765	15,477	169	277	510
<b>Total</b>	<b>97,642</b>	<b>44,308</b>	<b>942</b>	<b>976</b>	<b>2,959</b>

Allocation by TAZ					
11033		10063			
Emp	Pop	Emp	Pop	Emp	Pop
287	20	223	1,141		
63	340	42	226		
95	395	63	263		
102	291	68	194		
<b>546</b>	<b>1,045</b>	<b>396</b>	<b>1,824</b>	<b>0</b>	<b>0</b>



Exhibit 48  
 Recommended Development and Land Use Program  
 Northeast Corridor--36th Street Station



	Office	Retail	High Res
Total Estimated Growth	129,277	108,628	1,549
Previous Est (05/06)	130,471	36,033	538
Pipeline Projects	0	0	119
Remaining Growth	129,277	108,628	1,431

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	31.0	4.5	57.0

**What's Changed?**

NoDa momentum has increased and spread along North Davidson. Residential has been stronger play to date. Some dilapidation of mill to north of 36th Street.

**Key Considerations:**

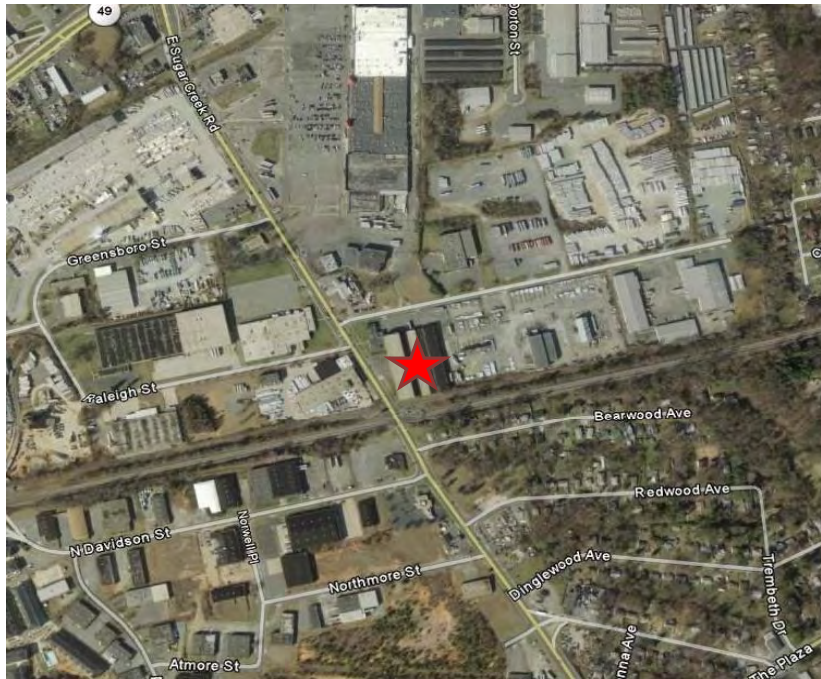
- Regional access very limited, so office and retail are local plays, building on residential momentum and unique position of NoDa.
- True neighborhood core and comfortable scale benefit redevelopment, which will likely be more heavily focused east of station, but will spread west toward North Tryon.
- Vacant properties exist for open space west of rail line
- Emphasize placemaking and connectivity to west toward North Tryon.

Allocated Growth	Office		Retail	Employment	High-Density Residential	Population
	Office	Retail				
Base Year				1755		1936
Increase 2008 - 2015	37,698	33,646		208	539	993
Increase 2015 - 2025	43,861	37,054		237	526	969
Increase 2025 - 2035	47,718	37,928		252	484	892
<b>Total</b>	<b>129,277</b>	<b>108,628</b>		<b>2,452</b>	<b>1,549</b>	<b>4,790</b>

Allocation by TAZ						
11034		10072		10071		
Emp	Pop	Emp	Pop	Emp	Pop	
378	166	377	1,447	1,000	323	
104	472	52	236	52	236	
118	460	59	230	59	230	
126	424	63	212	63	212	
<b>726</b>	<b>1,522</b>	<b>551</b>	<b>2,125</b>	<b>1,174</b>	<b>1,001</b>	



Exhibit 49  
 Recommended Development and Land Use Program  
 Northeast Corridor--Sugar Creek Station



	Office	Retail	High Res
Total Estimated Growth	34,792	83,447	358
Previous Est (05/06)	267,637	110,895	833
Pipeline Projects	0	0	0
Remaining Growth	34,792	83,447	358

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	8.0	12.0	0.0

**What's Changed?**

With the exception of the station alignment, very little. Area continues to lag with Asian Corners center struggling. Station area dominated by industrial uses and lower-income housing to south.

**Key Considerations:**

- Regional access limited, and redevelopment opportunities are moderate.
- Redevelop Asian Corners site with mix of retail and residential in hybrid town center format to anchor the area. Secure open space on or around the property as well for parks.
- Placemaking and connectivity become very important to value creation to fuel redevelopment.

Allocated Growth	Office		Retail	Employment	High-Density Residential	Population
	Office	Retail				
Base Year				1338		1224
Increase 2008 - 2015	4,265	25,030		77	0	0
Increase 2015 - 2025	14,620	27,585		117	150	277
Increase 2025 - 2035	15,906	30,832		129	208	382
<b>Total</b>	<b>34,792</b>	<b>83,447</b>		<b>1,661</b>	<b>358</b>	<b>1,883</b>

Allocation by TAZ					
10048		11035		10047	
Emp	Pop	Emp	Pop	Emp	Pop
416	288	825	419	97	517
31	0	23	0	23	0
47	105	35	79	35	79
52	145	39	109	39	109
<b>545</b>	<b>538</b>	<b>922</b>	<b>607</b>	<b>194</b>	<b>705</b>





Exhibit 50  
 Recommended Development and Land Use Program  
 Northeast Corridor--Old Concord Station



	Office	Retail	High Res
Total Estimated Growth	33,570	107,009	425
Previous Est (05/06)	223,911	92,678	936
Pipeline Projects	0	0	0
Remaining Growth	33,570	107,009	425

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	22.0	14.0	0.0

**What's Changed?**

Station location is the major change. Area continues to underperform. Tryon Mall badly outdated and needs to be redeveloped. Remaining properties are lower-income residential and aging or underutilized retail.

**Key Considerations:**

- Very challenging regional access with retail cut off from the north.
- Little appeal to office users given lack of management-level housing and access issues.
- Parcel assemblage may be needed to jump-start redevelopment, or work to raze and redevelop Tryon Mall site.
- Enhance park access to the south and pursue greenway or linear park in area.

Allocated Growth	Office		Retail	Employment	High-Density Residential	Population
	Office	Retail				
Base Year				1021		1150
Increase 2008 - 2015	0	28,646		72	0	0
Increase 2015 - 2025	0	35,169		88	99	183
Increase 2025 - 2035	33,570	43,194		218	326	601
<b>Total</b>	<b>33,570</b>	<b>107,009</b>		<b>1,399</b>	<b>425</b>	<b>1,933</b>

Allocation by TAZ					
10309		11036		10311	
Emp	Pop	Emp	Pop	Emp	Pop
333	320	465	52	223	778
29	0	21	0	21	0
35	69	26	52	26	52
87	228	66	171	66	171
<b>484</b>	<b>618</b>	<b>578</b>	<b>275</b>	<b>336</b>	<b>1,001</b>





Exhibit 51  
 Recommended Development and Land Use Program  
 Northeast Corridor--Tom Hunter Station



	Office	Retail	High Res
Total Estimated Growth	33,570	47,421	425
Previous Est (05/06)	150,299	91,238	1,215
Pipeline Projects	0	0	0
Remaining Growth	33,570	47,421	425

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	12.0	12.0	1.0

**What's Changed?**

Very little in last couple of years. Minor additions to retail supply, although larger retail growth to the north at City Boulevard Station.

**Key Considerations:**

- Lower incomes and poor regional access limit office opportunities while lack of east-west thoroughfares limit retail play
- Some vacant property to the west creates opportunities for infill residential if combined with redeveloped retail front.
- Prune midblock retail from the area and focus on creating mini-destination around station area.

Allocated Growth	Office		Retail	Employment	High-Density Residential	Population
	Office	Retail				
Base Year				643		1530
Increase 2008 - 2015	0	15,233		38	0	0
Increase 2015 - 2025	0	15,501		39	99	183
Increase 2025 - 2035	33,570	16,687		152	326	601
<b>Total</b>	<b>33,570</b>	<b>47,421</b>		<b>872</b>	<b>425</b>	<b>2,313</b>

Allocation by TAZ					
11037		10313			
Emp	Pop	Emp	Pop	Emp	Pop
373	105	270	1,425		
23	0	15	0		
23	104	16	69		
91	342	61	228		
<b>510</b>	<b>552</b>	<b>362</b>	<b>1,723</b>	<b>0</b>	<b>0</b>



Exhibit 52  
 Recommended Development and Land Use Program  
 Northeast Corridor--University City Boulevard Station



	Office	Retail	High Res
Total Estimated Growth	270,587	716,137	1,381
Previous Est (05/06)	489,044	150,757	1,823
Pipeline Projects	0	1,052,500	684
Remaining Growth	270,587	-336,363	697

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	23.0	19.0	26.5

**What's Changed?**

Major changes in road patterns, including new I-85 interchange and reconfiguration of 49/29 weave to surface intersection creating upside to the area. Major new destination retail already being developed.

**Key Considerations:**

- Very strong regional access creates major retail destination opportunities. Also could be attractive for office users and multifamily development as well.
- East side of 29 represents good multifamily play as well
- Major key will be value creation and creation of sustainable core that is pedestrian-oriented and transit-supportive.
- Securing park and open space opportunities important to value creation as well.

Allocated Growth					
	Office	Retail	Employment	High-Density Residential	Population
Base Year			2933		252
Increase 2008 - 2015	119,641	220,505	945	594	1,095
Increase 2015 - 2025	63,662	247,349	828	397	731
Increase 2025 - 2035	87,283	248,282	908	390	719
<b>Total</b>	<b>270,587</b>	<b>716,137</b>	<b>5,613</b>	<b>1,381</b>	<b>2,796</b>

Allocation by TAZ					
11038		10301			
Emp	Pop	Emp	Pop	Emp	Pop
190	19	2,743	233		
567	416	189	312		
497	278	166	208		
545	273	182	205		
<b>1,798</b>	<b>986</b>	<b>3,279</b>	<b>958</b>	<b>0</b>	<b>0</b>



Exhibit 53  
 Recommended Development and Land Use Program  
 Northeast Corridor--McCullough Station



	Office	Retail	High Res
Total Estimated Growth	411,629	102,290	1,032
Previous Est (05/06)	546,957	140,124	1,499
Pipeline Projects	0	0	372
Remaining Growth	411,629	102,290	659

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	20.0	5.0	24.5

**What's Changed?**

Office momentum slowing east of I-85 with retail maxing out in the short-term. Key considerations to how University City Blvd interchange impacts Harris Boulevard. Apartment construction continuing.

**Key Considerations:**

- Very strong regional access creates major retail destination opportunities. Office market likely to remain slower east of I-85 given lack of executive housing, overabundance of apartments, and lack of anchors.
- Focus needs to be on value creation through streetscaping, pedestrian orientations and redevelopment of stand-alone uses.
- Securing park and open space opportunities important to value creation as well.
- Finally, greater focus on securing for-sale housing in area important, but value must be there for for-sale housing to come.

Allocated Growth					
	Office	Retail	Employment	High-Density Residential	Population
Base Year			6303		312
Increase 2008 - 2015	154,920	36,181	600	594	1,095
Increase 2015 - 2025	122,427	33,233	486	243	448
Increase 2025 - 2035	134,282	32,876	524	194	358
<b>Total</b>	<b>411,629</b>	<b>102,290</b>	<b>7,913</b>	<b>1,032</b>	<b>2,212</b>

Allocation by TAZ					
11039		11040		10301	
Emp	Pop	Emp	Pop	Emp	Pop
867	79	2,693	0	2,743	233
240	416	180	312	180	312
194	170	146	128	146	128
210	136	157	102	157	102
<b>1,511</b>	<b>801</b>	<b>3,176</b>	<b>542</b>	<b>3,226</b>	<b>775</b>





Exhibit 54  
 Recommended Development and Land Use Program  
 Northeast Corridor--JW Clay Blvd Station



	Office	Retail	High Res
Total Estimated Growth	434,881	86,825	1,575
Previous Est (05/06)	740,494	71,752	841
Pipeline Projects	0	0	0
Remaining Growth	434,881	86,825	1,575

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	34.0	23.0	29.0

**What's Changed?**

UNCC establishing a greater presence on North Tryon. Overall office development east of I-85 moderating with URP having greater momentum. Retail maxing out and possibly losing momentum to Belmeade.

**Key Considerations:**

- Area will remain a major retail destination, although will need to evolve to fend off new retail to the south and future retail to the north.
- Focus needs to be on value creation through streetscaping, pedestrian orientations and redevelopment of stand-alone uses.
- Securing park and open space opportunities important to value creation as well.
- If transit is making North Tryon the "front door", need to re-orient University Place to be less insular--needs reason to turn around though.

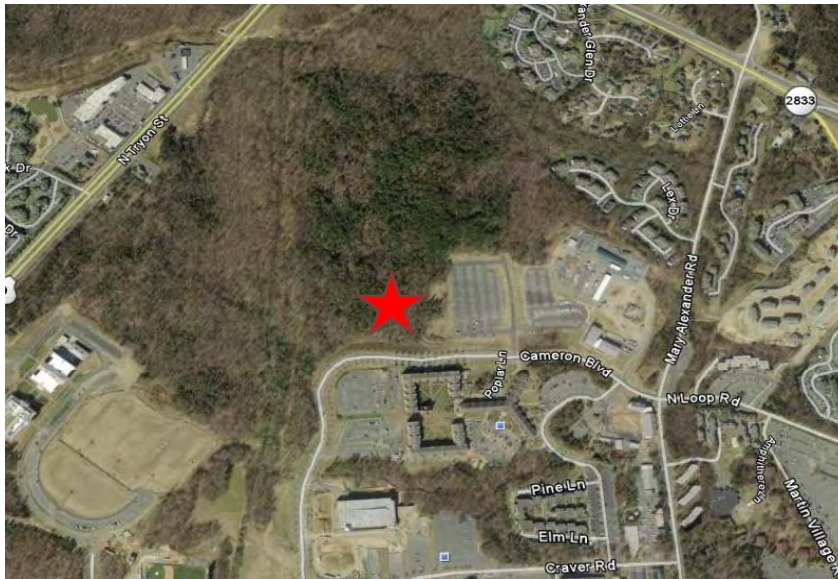
Allocated Growth					
	Office	Retail	Employment	High-Density Residential	Population
Base Year			3980		493
Increase 2008 - 2015	96,894	32,375	400	429	791
Increase 2015 - 2025	156,707	27,928	585	496	914
Increase 2025 - 2035	181,281	26,522	663	650	1,198
<b>Total</b>	<b>434,881</b>	<b>86,825</b>	<b>5,628</b>	<b>1,575</b>	<b>3,395</b>

Allocation by TAZ					
11041		11040			
Emp	Pop	Emp	Pop	Emp	Pop
1,287	493	2,693	0		
320	601	80	150		
468	694	117	174		
530	910	133	228		
<b>2,605</b>	<b>2,699</b>	<b>3,023</b>	<b>551</b>	<b>0</b>	<b>0</b>





Exhibit 55  
 Recommended Development and Land Use Program  
 Northeast Corridor--UNC Charlotte Station



	Office	Retail	High Res
Total Estimated Growth	0	0	392
Previous Est (NA)	NA	NA	NA
Pipeline Projects	0	0	0
Remaining Growth	0	0	392

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	0.0	15.0	0.0

**What's Changed?**

New station located on campus of UNCC. Campus growth increasingly to west. Plans for football stadium and continuing campus growth being examined in campus master plan currently in process.

**Key Considerations:**

- All property is campus-owned and no fully-private land development can occur around station.
- Campus plans to grow to 35,000 to 40,000 students in coming decades.
- Given tight funding, campus is open to exploring development around the station with private entities, although development would need to be focused on housing, probably for student populations.

Allocated Growth					
	Office	Retail	Employment	High-Density Residential	Population
Base Year			2409		5109
Increase 2008 - 2015	0	0	0	0	0
Increase 2015 - 2025	0	0	0	198	365
Increase 2025 - 2035	0	0	0	194	358
<b>Total</b>	<b>0</b>	<b>0</b>	<b>2,409</b>	<b>392</b>	<b>5,832</b>

Allocation by TAZ					
10300					
Emp	Pop	Emp	Pop	Emp	Pop
2,409	5,109				
0	0				
0	347				
0	340				
<b>2,409</b>	<b>5,796</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>



Exhibit 56  
 Recommended Development and Land Use Program  
 Northeast Corridor--Mallard Creek Church Station



	Office	Retail	High Res
Total Estimated Growth	1,344,129	119,590	966
Previous Est (05/06)	290,114	60,514	683
Pipeline Projects	200,000	58,000	0
Remaining Growth	1,144,129	61,590	966

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	22.0	10.0	80.0

**What's Changed?**

Station has shifted east along Mallard Creek Church Road and is no longer fronting on North Tryon Street. Property ownership is largely university-oriented with town center master plan being undertaken currently.

**Key Considerations:**

- Location east of creek diminishes retail opportunities.
- Large-scale build-to-suit proposed at N. Tryon & Mallard Creek Church could fuel further office growth.
- Campus property allows for creation of unified master plan with opportunity to create town center campus has never enjoyed.

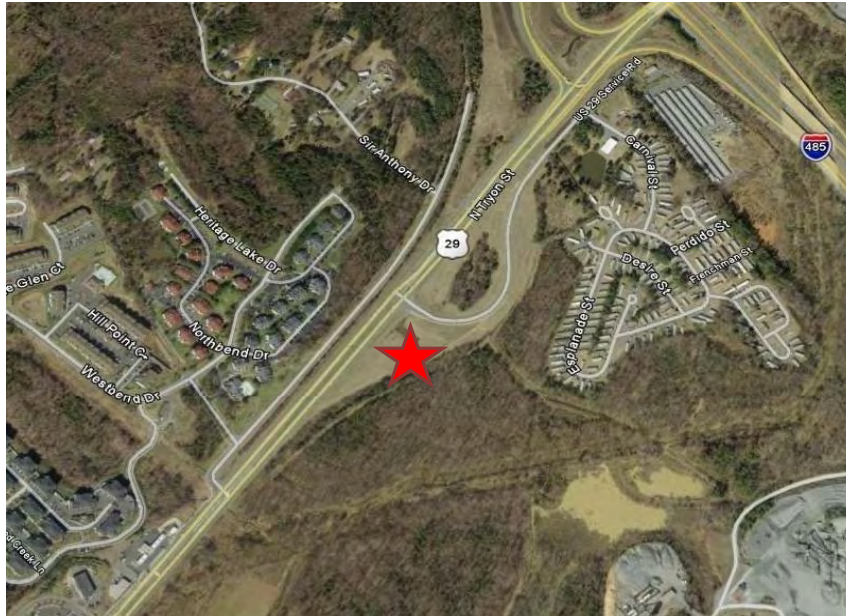
Allocated Growth			Employment	High-Density Residential	Population
	Office	Retail			
Increase 2008 - 2015	1,145,476	37,707	120	264	525
Increase 2015 - 2025	97,942	41,136	3,862	442	487
Increase 2025 - 2035	100,711	40,747	425	260	813
<b>Total</b>	<b>1,344,129</b>	<b>119,590</b>	<b>4,840</b>	<b>966</b>	<b>2,304</b>

Allocation by TAZ					
11042		10292			
Emp	Pop	Emp	Pop	Emp	Pop
69	5	51	520		
1,159	92	2,704	370		
128	155	298	618		
130	91	303	364		
<b>1,485</b>	<b>343</b>	<b>3,355</b>	<b>1,872</b>	<b>0</b>	<b>0</b>



CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 57  
 Recommended Development and Land Use Program  
 Northeast Corridor--I-485/N. Tryon Station



	Office	Retail	High Res
Total Estimated Growth	149,682	320,318	804
Previous Est (05/06)	220,196	103,272	1,388
Pipeline Projects	0	0	0
Remaining Growth	149,682	320,318	804

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	41.0	27.0	6.0

**What's Changed?**

Some new multifamily development in the area with commercial present along Mallard Creek Church to the south. Station location inside of I-485 has been finalized.

**Key Considerations:**

- Reconfiguration of I-485 interchange will help opportunities for commercial uses, although surface road challenges will temper that opportunity.
- Area definitely lacks any type of orientation or pedestrian scale--will necessitate investment in infrastructure. Connect area up to park and greenway as well.

Allocated Growth					
	Office	Retail	Employment	High-Density Residential	Population
Base Year			140		3234
Increase 2008 - 2015	0	95,058	238	97	178
Increase 2015 - 2025	48,971	112,824	443	253	466
Increase 2025 - 2035	100,711	112,436	612	454	837
<b>Total</b>	<b>149,682</b>	<b>320,318</b>	<b>1,433</b>	<b>804</b>	<b>4,715</b>

Allocation by TAZ					
11045		10292		10290	
Emp	Pop	Emp	Pop	Emp	Pop
23	406	51	520	66	2,308
166	119	48	34	24	17
310	310	89	88	44	44
429	556	122	159	61	79
<b>928</b>	<b>1,391</b>	<b>310</b>	<b>801</b>	<b>195</b>	<b>2,449</b>





CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS



Exhibit 58  
 Estimated Development Potential by Station Area for the Southeast Corridor  
 2008 - 2035

2008 - 2015

Station Area	New					Cumulative				
	Office Square Feet	Retail Square Feet	Net New Employees	Residential Units	Net New Population	Office Square Feet	Retail Square Feet	Net Added Employees	Residential Units	Net Added Population
<b>Total Corridor</b>	<b>513,641</b>	<b>210,946</b>	<b>2,217</b>	<b>2,042</b>	<b>3,762</b>	<b>513,641</b>	<b>210,946</b>	<b>2,217</b>	<b>2,042</b>	<b>3,762</b>
Elizabeth	57,620	45,735	304	440	811	57,620	45,735	304	440	811
Pecan	22,161	23,942	133	495	913	22,161	23,942	133	495	913
Briar Creek	8,865	3,343	38	165	304	8,865	3,343	38	165	304
Amity Gardens	0	22,127	55	47	87	0	22,127	55	47	87
Sharon Amity	9,902	3,568	41	29	53	9,902	3,568	41	29	53
Conference Drive	0	4,839	12	29	53	0	4,839	12	29	53
Village Lake	42,499	8,989	162	47	87	42,499	8,989	162	47	87
Sardis	84,999	30,905	357	235	433	84,999	30,905	357	235	433
Independence Pointe	53,847	14,374	213	272	502	53,847	14,374	213	272	502
Highway 51	160,096	18,363	573	282	520	160,096	18,363	573	282	520
Matthews	21,250	11,576	99	0	0	21,250	11,576	99	0	0
CPC	52,401	23,185	230	0	0	52,401	23,185	230	0	0

2015 - 2025

Station Area	New					Cumulative				
	Office Square Feet	Retail Square Feet	Net New Employees	Residential Units	Net New Population	Office Square Feet	Retail Square Feet	Net Added Employees	Residential Units	Net Added Population
<b>Total Corridor</b>	<b>809,652</b>	<b>291,138</b>	<b>3,391</b>	<b>3,391</b>	<b>6,246</b>	<b>1,323,293</b>	<b>502,084</b>	<b>5,608</b>	<b>5,433</b>	<b>10,008</b>
Elizabeth	89,786	54,695	432	538	991	147,405	100,429	736	978	1,802
Pecan	48,974	29,450	235	503	926	71,135	53,392	367	998	1,838
Briar Creek	24,487	4,108	91	305	561	33,352	7,451	128	470	865
Amity Gardens	49,435	43,488	271	307	565	49,435	65,615	327	354	652
Sharon Amity	32,320	6,257	122	159	294	42,222	9,825	163	188	346
Conference Drive	17,115	9,662	80	159	294	17,115	14,501	93	188	346
Village Lake	64,641	14,294	248	159	294	107,140	23,283	411	206	380
Sardis	129,281	39,654	524	454	837	214,280	70,558	881	690	1,270
Independence Pointe	32,320	19,275	155	250	460	86,168	33,650	368	522	962
Highway 51	142,578	23,602	528	250	460	302,674	41,965	1,101	532	980
Matthews	64,641	15,335	251	205	377	85,890	26,911	350	205	377
CPC	114,075	31,318	454	102	188	166,477	54,503	684	102	188





CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS



Exhibit 58  
 Estimated Development Potential by Station Area for the Southeast Corridor  
 2008 - 2035

2025 - 2035

Station Area	New					Cumulative				
	Office Square Feet	Retail Square Feet	Net New Employees	Residential Units	Net New Population	Office Square Feet	Retail Square Feet	Net Added Employees	Residential Units	Net Added Population
<b>Total Corridor</b>	<b>875,218</b>	<b>288,431</b>	<b>3,600</b>	<b>3,471</b>	<b>6,395</b>	<b>2,198,511</b>	<b>790,515</b>	<b>9,208</b>	<b>8,904</b>	<b>16,403</b>
Elizabeth	100,942	51,363	460	433	798	248,348	151,792	1,196	1,412	2,600
Pecan	55,059	27,807	251	433	798	126,195	81,200	618	1,431	2,636
Briar Creek	27,530	4,098	101	371	684	60,881	11,549	229	841	1,549
Amity Gardens	85,912	50,416	409	393	725	135,347	116,031	735	747	1,376
Sharon Amity	34,584	7,921	134	282	519	76,807	17,747	297	470	865
Conference Drive	34,584	14,002	149	228	420	51,699	28,503	241	416	767
Village Lake	52,425	13,863	207	277	510	159,565	37,146	618	483	890
Sardis	87,010	32,723	368	219	403	301,290	103,281	1,249	908	1,673
Independence Pointe	34,584	15,910	154	0	0	120,752	49,560	521	522	962
Highway 51	87,010	20,255	337	165	304	389,683	62,220	1,437	697	1,284
Matthews	69,169	15,556	266	335	617	155,059	42,467	616	540	994
CPCC	206,408	34,516	765	335	617	372,885	89,019	1,449	437	806



CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS



Exhibit 58  
 Estimated Development Potential by Station Area for the Southeast Corridor  
 2008 - 2035

Station Area	Total Growth			Pipeline Projects			Future Projects Growth		
	Employees	Households	Population	Employees	Households	Population	Employees	Households	Population
<b>Total Corridor</b>	<b>5,184</b>	<b>6,708</b>		<b>2,398</b>	<b>808</b>		<b>2,786</b>	<b>5,901</b>	
Elizabeth	1,196	1,412	2,470	2,000	808	1,413	-804	604	1,057
Pecan	618	1,431	2,505	11	0	0	607	1,431	2,505
Briar Creek	229	841	1,472	0	0	0	229	841	1,472
Amity Gardens	735	747	1,308	388	0	0	348	747	1,308
Sharon Amity	297	470	822	0	0	0	297	470	822
Conference Drive	241	416	728	0	0	0	241	416	728
Village Lake	618	483	846	0	0	0	618	483	846
Sardis	1,249	908	1,589	0	0	0	1,249	908	1,589
Independence Pointe	521	522	914	0	0	0	521	522	914
Highway 51	1,437	697	1,220	0	0	0	1,437	697	1,220
Matthews	616	540	944	0	0	0	616	540	944
CPC	1,449	437	765	661	57	100	789	380	666

Station Area	Acres Net of Pipeline	New TSD Acres Needed Net Pipeline		
		M	R	E
<b>Total Corridor</b>	<b>329.5</b>	<b>82.0</b>	<b>193.5</b>	<b>54.0</b>
Elizabeth	17.0	0.0	17.0	0.0
Pecan	57.5	14.0	40.5	3.0
Briar Creek	34.0	0.0	32.0	2.0
Amity Gardens	43.0	7.5	30.5	5.0
Sharon Amity	29.0	11.0	13.5	4.5
Conference Drive	25.0	10.0	13.0	2.0
Village Lake	33.0	1.5	20.0	11.5
Sardis	55.0	14.0	21.0	20.0
Independence Pointe	36.0	24.0	6.0	6.0
Highway 51	63.0	7.0	20.0	36.0
Matthews	37.0	0.0	25.0	12.0
CPC	30.5	5.5	12.0	13.0



CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 59  
 Recommended Development and Land Use Program  
 Southeast Corridor--Elizabeth Station



	Office	Retail	High Res
Total Estimated Growth	248,348	151,792	1,412
<i>Previous Est (05/06)</i>	<i>72,255</i>	<i>23,122</i>	<i>255</i>
Pipeline Projects	450,000	250,000	808
Remaining Growth	-201,652	-98,208	604

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	0.0	17.0	0.0

**What's Changed?**

Elizabeth area continues to revitalize, flanked by the growth of the hospitals, Metropolitan Midtown, CPCC, and Plaza/Midwood. Plans continue to progress with Grubbs' mixed-use development at the core of Elizabeth.

**Key Considerations:**

- Strong demand generators for retail, office and residential uses in the immediate vicinity.
- Grubbs development can add stronger sense of location generally lacking in the area today.
- Grubbs development should provide for ample retail and office space, with additional residential representing the most significant opportunity.
- Scale in place for strong urban environment--focus on pedestrian improvements to area.

Allocated Growth					
	Office	Retail	Employment	High-Density Residential	Population
Base Year			1510		705
Increase 2008 - 2015	57,620	45,735	304	440	811
Increase 2015 - 2025	89,786	54,695	432	538	991
Increase 2025 - 2035	100,942	51,363	460	433	798
<b>Total</b>	<b>248,348</b>	<b>151,792</b>	<b>2,706</b>	<b>1,412</b>	<b>3,305</b>

Allocation by TAZ					
10115		10119			
Emp	Pop	Emp	Pop	Emp	Pop
1,133	163	377	542		
213	539	91	231		
302	659	130	282		
322	531	138	227		
<b>1,970</b>	<b>1,892</b>	<b>736</b>	<b>1,283</b>	<b>0</b>	<b>0</b>



CITY OF CHARLOTTE  
ESTIMATED DEVELOPMENT POTENTIAL  
FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 60  
Recommended Development and Land Use Program  
Southeast Corridor--Pecan Station



	Office	Retail	High Res
Total Estimated Growth	126,195	81,200	1,431
<i>Previous Est (05/06)</i>	<i>91,258</i>	<i>80,063</i>	<i>1,140</i>
Pipeline Projects	0	4,477	0
Remaining Growth	126,195	76,723	1,431

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	14.0	40.5	3.0

**What's Changed?**

The Plaza/Midwood area has seen an increasing amount of new infill residential and commercial product, mostly on a smaller scale, complementing the existing character of the area. Larger properties representing redevelopment opportunities still remain in play.

**Key Considerations:**

- Great sense of location, scale, and authenticity should increasingly appeal to new residents and businesses.
- Development of properties along existing rail line to north and south of Central can bolster station growth.
- Area, along with NoDa, represents great opportunity for moderately-priced intown core.
- Scale in place for strong urban environment--focus on pedestrian improvements to area.

Allocated Growth					
	Office	Retail	Employment	High-Density Residential	Population
Base Year			2349		1657
Increase 2008 - 2015	22,161	23,942	133	495	913
Increase 2015 - 2025	48,974	29,450	235	503	926
Increase 2025 - 2035	55,059	27,807	251	433	798
<b>Total</b>	<b>126,195</b>	<b>81,200</b>	<b>2,967</b>	<b>1,431</b>	<b>4,293</b>

Allocation by TAZ					
10087		10065		10105	
Emp	Pop	Emp	Pop	Emp	Pop
1,095	219	682	709	572	729
66	434	40	260	27	173
117	440	70	264	47	176
125	379	75	227	50	152
<b>1,404</b>	<b>1,471</b>	<b>867</b>	<b>1,460</b>	<b>696</b>	<b>1,230</b>





CITY OF CHARLOTTE  
ESTIMATED DEVELOPMENT POTENTIAL  
FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 61  
Recommended Development and Land Use Program  
Southeast Corridor--Briar Creek Station



	Office	Retail	High Res
Total Estimated Growth	60,881	11,549	841
Previous Est (05/06)	174,345	69,661	886
Pipeline Projects	0	0	0
Remaining Growth	60,881	11,549	841

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	0.0	32.0	2.0

**What's Changed?**

Station location has shifted somewhat east to more of a mid-block location along Independence. Retail along Independence continues to suffer and create significant negative perceptions of the area, particularly to the east. Adjacent single-family neighborhoods still holding up well.

**Key Considerations:**

- Mid-block location and lack of major cross-streets significantly tempers retail and office opportunities. Residential a stronger play at this location.
- Residential can be strengthened by proactive purchase and clearing of unsightly retail uses along Independence and connections to adjacent single-family neighborhoods.
- Development on south side of Independence a tougher play.
- Consider creation of linear park along redeveloped Independence to amenitize new and existing residential areas in the corridor.

Allocated Growth					
	Office	Retail	Employment	High-Density Residential	Population
Base Year			2401		1040
Increase 2008 - 2015	8,865	3,343	38	165	304
Increase 2015 - 2025	24,487	4,108	91	305	561
Increase 2025 - 2035	27,530	4,098	101	371	684
<b>Total</b>	<b>60,881</b>	<b>11,549</b>	<b>2,630</b>	<b>841</b>	<b>2,589</b>

Allocation by TAZ					
10098		10097		11059	
Emp	Pop	Emp	Pop	Emp	Pop
408	458	1,205	465	788	117
24	188	6	43	8	58
59	346	14	80	18	107
66	422	15	97	20	130
<b>557</b>	<b>1,415</b>	<b>1,239</b>	<b>686</b>	<b>834</b>	<b>411</b>



CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 62  
 Recommended Development and Land Use Program  
 Southeast Corridor--Amity Gardens Station



	Office	Retail	High Res
Total Estimated Growth	135,347	116,031	747
<i>Previous Est (05/06)</i>	<i>137,388</i>	<i>83,095</i>	<i>1,115</i>
Pipeline Projects	0	155,000	0
Remaining Growth	135,347	-38,969	747

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	7.5	30.5	5.0

**What's Changed?**

Area continues to remain stable, albeit not at a desirable economic point. Retail remains abandoned throughout station area and residential areas perform moderately well in spite of the blight along Independence. Wal-Mart still pursuing store in station area.

**Key Considerations:**

- Again, mid-block location and lack of major cross-streets significantly tempers retail and office opportunities. Residential likely best option for mid-block location.
- Significant upside could be achieved through buyout of retail in area and creating linear park, selling off properties for new higher-density residential with park access.
- Retail likely dead at this location and very unlikely to return in a desirable format. Resolution of Wal-Mart site an outstanding issue.

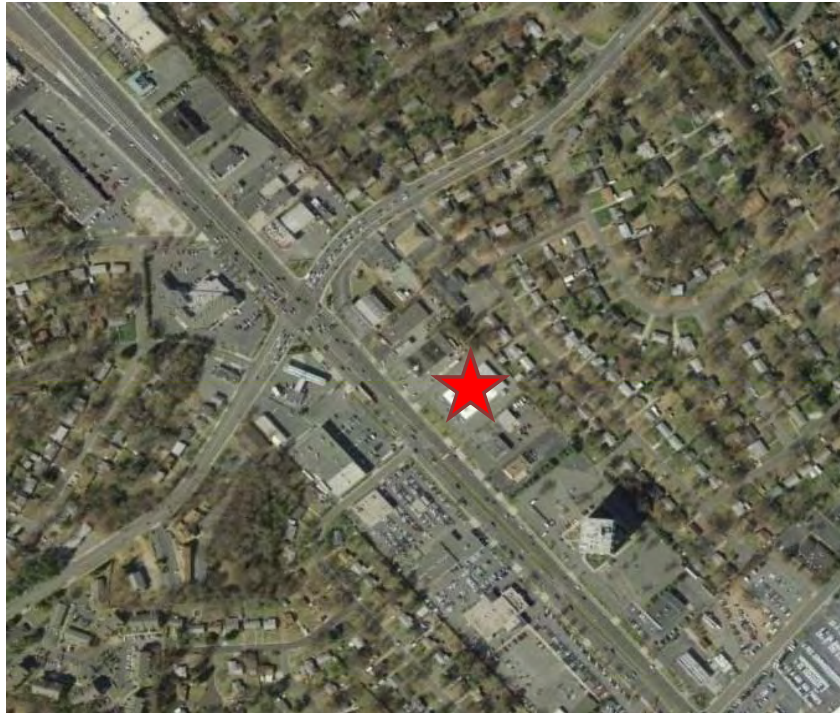
Allocated Growth					
	Office	Retail	Employment	High-Density Residential	Population
Base Year			384		818
Increase 2008 - 2015	0	22,127	55	47	87
Increase 2015 - 2025	49,435	43,488	271	307	565
Increase 2025 - 2035	85,912	50,416	409	393	725
<b>Total</b>	<b>135,347</b>	<b>116,031</b>	<b>1,119</b>	<b>747</b>	<b>2,194</b>

Allocation by TAZ					
10100		10094		10095	
Emp	Pop	Emp	Pop	Emp	Pop
219	209	123	390	42	219
33	49	11	16	11	16
163	322	54	107	54	107
245	413	82	138	82	138
<b>660</b>	<b>994</b>	<b>270</b>	<b>652</b>	<b>189</b>	<b>481</b>



CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 63  
 Recommended Development and Land Use Program  
 Southeast Corridor--Sharon Amity Station



	Office	Retail	High Res
Total Estimated Growth	76,807	17,747	470
<i>Previous Est (05/06)</i>	<i>86,412</i>	<i>85,604</i>	<i>1,190</i>
Pipeline Projects	0	0	0
Remaining Growth	76,807	17,747	470

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	11.0	13.5	4.5

**What's Changed?**

Retail along Independence continues to struggle, suffering from a combination of oversupply, uncertainty/doubts about road construction, and obsolescence. Little upside for redevelopment as area lacks anchors/change, so gradually area lags further behind.

**Key Considerations:**

- Redevelopment in the station area is relatively challenging, with a lack of major cross-streets (non-interchange), relatively smaller properties, and few anchors for development.
- Residential upside could be enhanced with redevelopment of Independence corridor as linear park.
- As with many other suburban station areas, creating pedestrian-oriented environments and facilitating redevelopment are major goals.

Allocated Growth					
	Office	Retail	Employment	High-Density Residential	Population
Base Year			2386		2887
Increase 2008 - 2015	9,902	3,568	41	29	53
Increase 2015 - 2025	32,320	6,257	122	159	294
Increase 2025 - 2035	34,584	7,921	134	282	519
<b>Total</b>	<b>76,807</b>	<b>17,747</b>	<b>2,683</b>	<b>470</b>	<b>3,752</b>

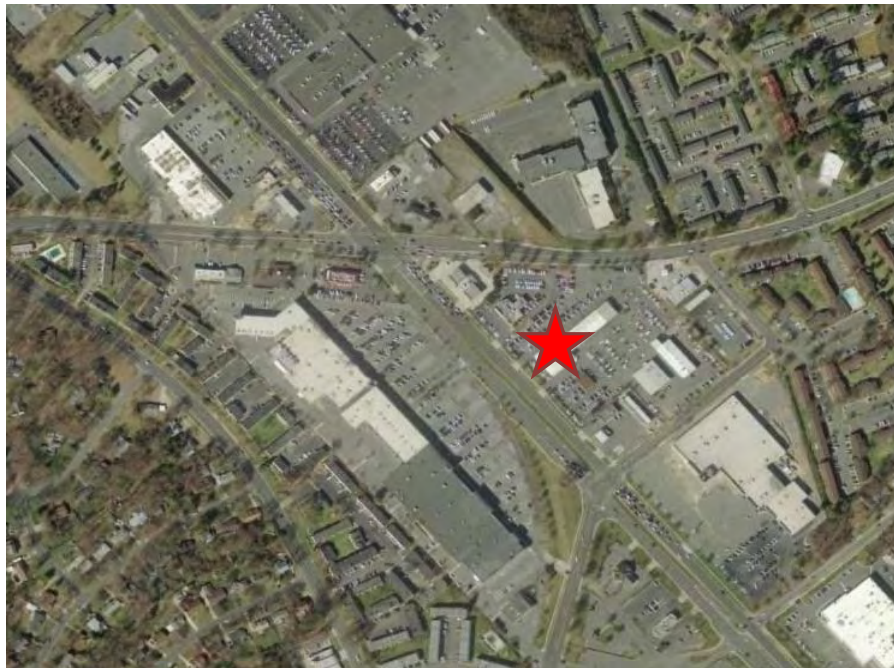
Allocation by TAZ					
11060		10405		10396	
Emp	Pop	Emp	Pop	Emp	Pop
919	348	1,001	2,130	466	409
25	30	8	10	8	10
73	167	24	56	24	56
80	296	27	99	27	99
<b>1,097</b>	<b>841</b>	<b>1,060</b>	<b>2,294</b>	<b>525</b>	<b>573</b>





CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 64  
 Recommended Development and Land Use Program  
 Southeast Corridor--Conference Station



	Office	Retail	High Res
Total Estimated Growth	51,699	28,503	416
<i>Previous Est (05/06)</i>	<i>59,361</i>	<i>98,097</i>	<i>1,449</i>
Pipeline Projects	0	0	0
Remaining Growth	51,699	28,503	416

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	10.0	13.0	2.0

**What's Changed?**

Conference Drive station area remains relatively stable, with retail remaining oversupplied, and some centers holding up more strongly than others. Rental apartments are generally oversupplied and rents for all land uses, as well as for-sale home prices, remain relatively flat.

**Key Considerations:**

- Pruning significant amounts of retail should be a priority for this station area, with the focus being on new mixed-use development on one key corner of the station area.
- Encouraging redevelopment of some aging apartments may be in order as well to bolster supply closer to station.
- Again, consideration of linear park along Independence with pockets of higher-intensity development should be consideration.

Allocated Growth					
	Office	Retail	Employment	High-Density Residential	Population
Base Year			2619		2405
Increase 2008 - 2015	0	4,839	12	29	53
Increase 2015 - 2025	17,115	9,662	80	159	294
Increase 2025 - 2035	34,584	14,002	149	228	420
<b>Total</b>	<b>51,699</b>	<b>28,503</b>	<b>2,860</b>	<b>416</b>	<b>3,172</b>

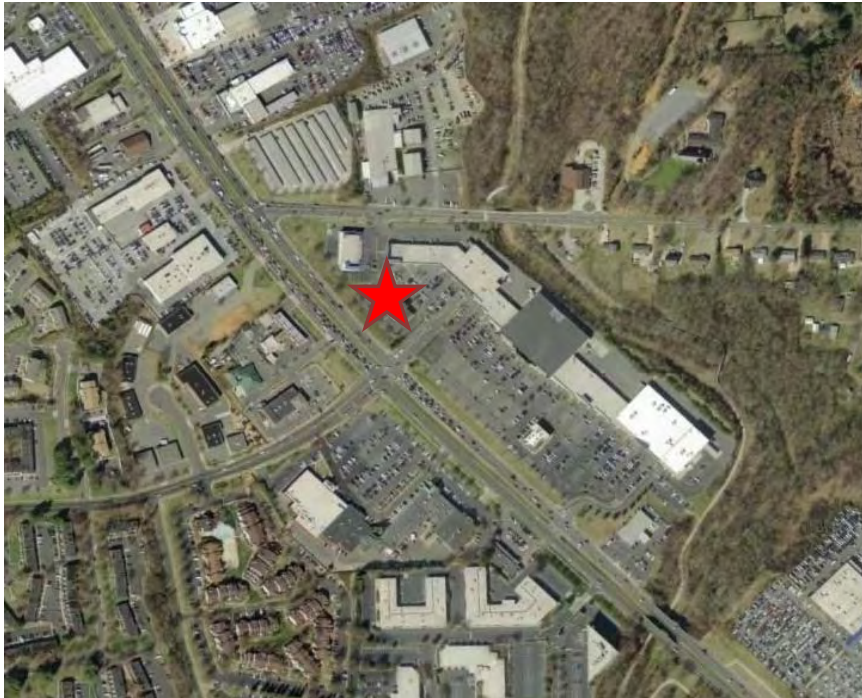
Allocation by TAZ					
11061		10402			
Emp	Pop	Emp	Pop	Emp	Pop
2,246	272	373	2,133		
10	40	2	10		
64	223	16	56		
119	320	30	80		
<b>2,439</b>	<b>855</b>	<b>421</b>	<b>2,279</b>	<b>0</b>	<b>0</b>





CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 65  
 Recommended Development and Land Use Program  
 Southeast Corridor--Village Lake Station



	Office	Retail	High Res
Total Estimated Growth	159,565	37,146	483
<i>Previous Est (05/06)</i>	<i>142,278</i>	<i>103,568</i>	<i>1,436</i>
Pipeline Projects	0	0	0
Remaining Growth	159,565	37,146	483

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	1.5	20.0	11.5

**What's Changed?**

Village Lake has remained relatively stable in the past several years, although the current recession is beginning to hit the retail market a bit.

**Key Considerations:**

- Again, retail oversupply likely to be an ongoing issue, particularly given potential long-term changes in spending patterns nationally.
- Creating sense of place and anchoring development, including greater connectivity with the McAlpine Greenway, should be encouraged to fuel demand for more office space and residential growth.
- Pedestrian enhancements, walkability, and creation of place are key points of focus for the Village Lake station area.
- Also, consider rerouting Margaret Wallace through retail center earlier to stabilize that center and improve traffic flow.

Allocated Growth					
	Office	Retail	Employment	High-Density Residential	Population
Base Year			1384		1209
Increase 2008 - 2015	42,499	8,989	162	47	87
Increase 2015 - 2025	64,641	14,294	248	159	294
Increase 2025 - 2035	52,425	13,863	207	277	510
<b>Total</b>	<b>159,565</b>	<b>37,146</b>	<b>2,002</b>	<b>483</b>	<b>2,099</b>

Allocation by TAZ					
11062					
Emp	Pop	Emp	Pop	Emp	Pop
1,384	1,209				
162	82				
248	279				
207	484				
<b>2,002</b>	<b>2,055</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>



CITY OF CHARLOTTE  
ESTIMATED DEVELOPMENT POTENTIAL  
FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 66  
Recommended Development and Land Use Program  
Southeast Corridor--Sardis North Station



	Office	Retail	High Res
Total Estimated Growth	301,290	103,281	908
Previous Est (05/06)	186,459	161,050	2,288
Pipeline Projects	0	0	0
Remaining Growth	301,290	103,281	908

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	14.0	21.0	20.0

**What's Changed?**

Crowne Point retail has weakened considerably in past several years and should be redeveloped in the coming decade or so. Property is underdeveloped and can be put to stronger use. Vacant property to north of Independence likely to also be redeveloped in coming years, with no firm plans of yet.

**Key Considerations:**

- Development of northern parcel along Independence likely to have mix of TOD and conventional development. May cannibalize other retail along Independence as well.
- That parcel, combined with Crowne Point retail redevelopment can create anchor for this portion of Independence, which is too non-descript today.
- Pedestrian enhancements, walkability, and creation of place are key points of focus for station area, all of which are achievable with redevelopment.

Allocated Growth					
	Office	Retail	Employment	High-Density Residential	Population
Base Year			1954		1443
Increase 2008 - 2015	84,999	30,905	357	235	433
Increase 2015 - 2025	129,281	39,654	524	454	837
Increase 2025 - 2035	87,010	32,723	368	219	403
<b>Total</b>	<b>301,290</b>	<b>103,281</b>	<b>3,203</b>	<b>908</b>	<b>3,116</b>

Allocation by TAZ					
10414		10418		10415	
Emp	Pop	Emp	Pop	Emp	Pop
395	311	1,149	0	410	1,132
214	247	71	82	71	82
315	477	105	159	105	159
221	229	74	76	74	76
<b>1,145</b>	<b>1,265</b>	<b>1,399</b>	<b>318</b>	<b>660</b>	<b>1,450</b>



Exhibit 67  
 Recommended Development and Land Use Program  
 Southeast Corridor--Independence Point Station



	Office	Retail	High Res
Total Estimated Growth	120,752	49,560	522
<i>Previous Est (05/06)</i>	<i>104,054</i>	<i>62,164</i>	<i>1,248</i>
Pipeline Projects	0	0	0
Remaining Growth	120,752	49,560	522

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	24.0	6.0	6.0

**What's Changed?**

New residential development infilling along Sam Newell Road south of the station itself. Retail along Independence aging and showing signs of weakening due to oversupply & cannibalism.

**Key Considerations:**

- Future of quarry site and potential long-term use as a park could anchor greater residential development. Also creation of greenway system along Parkway could encourage redevelopment.
- Creation of station "location", as opposed to collection of retail uses, needs to occur in coming decades.
- Finally, attention to how Windsor Square evolves in the coming years may become an issue.

Allocated Growth					
	Office	Retail	Employment	High-Density Residential	Population
Base Year			1111		3
Increase 2008 - 2015	53,847	14,374	213	272	502
Increase 2015 - 2025	32,320	19,275	155	250	460
Increase 2025 - 2035	34,584	15,910	154	0	0
<b>Total</b>	<b>120,752</b>	<b>49,560</b>	<b>1,632</b>	<b>522</b>	<b>965</b>

Allocation by TAZ					
10866		10417			
Emp	Pop	Emp	Pop	Emp	Pop
741	0	370	3		
170	381	43	95		
124	350	31	87		
123	0	31	0		
<b>1,158</b>	<b>731</b>	<b>474</b>	<b>186</b>	<b>0</b>	<b>0</b>





CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 68  
 Recommended Development and Land Use Program  
 Southeast Corridor--Highway 51 Station



	Office	Retail	High Res
Total Estimated Growth	389,683	62,220	697
Previous Est (05/06)	481,042	98,959	1,167
Pipeline Projects	0	0	0
Remaining Growth	389,683	62,220	697

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	7.0	20.0	36.0

**What's Changed?**

Significant new retail along NC 51 north of Independence is impacting retail to the south. Matthews Township Festival particularly troubled and likely to redevelop. Hospital continues to be an anchor in the area with new residential growth continuing.

**Key Considerations:**

- Facilitating redevelopment of some aging retail will be goal in the station area.
- Scale of area relatively good given its suburban location, although large parking areas will need to go away.
- While highly challenging, infilling linear park along Parkway would create greater value and upside in area.

Allocated Growth					
	Office	Retail	Employment	High-Density Residential	Population
Base Year			2157		520
Increase 2008 - 2015	160,096	18,363	573	282	520
Increase 2015 - 2025	142,578	23,602	528	250	460
Increase 2025 - 2035	87,010	20,255	337	165	304
<b>Total</b>	<b>389,683</b>	<b>62,220</b>	<b>3,594</b>	<b>697</b>	<b>1,804</b>

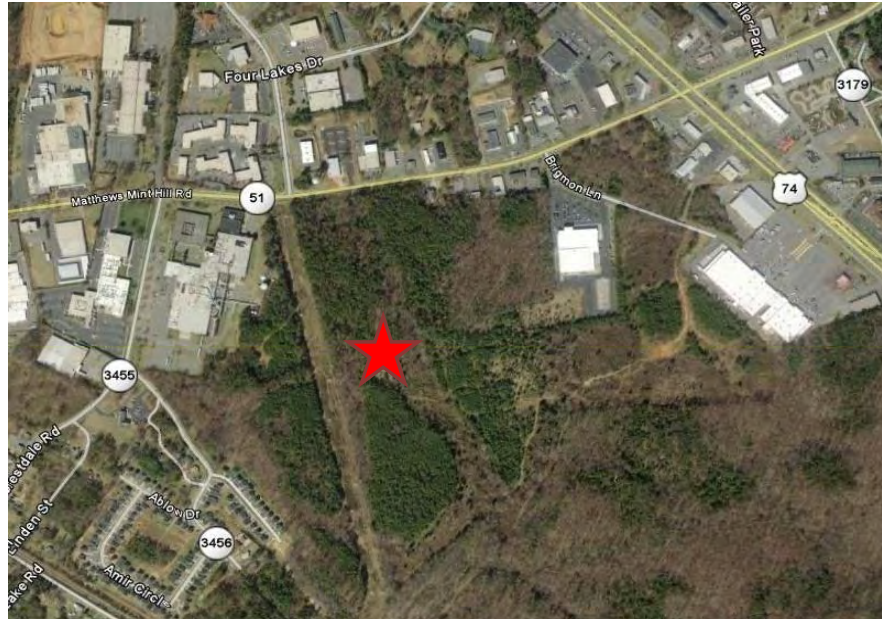
Allocation by TAZ					
11064		10865			
Emp	Pop	Emp	Pop	Emp	Pop
1,343	488	814	32		
458	395	115	99		
422	350	106	87		
269	231	67	58		
<b>2,493</b>	<b>1,464</b>	<b>1,101</b>	<b>276</b>	<b>0</b>	<b>0</b>





CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 69  
 Recommended Development and Land Use Program  
 Southeast Corridor--Matthews TOD



	Office	Retail	High Res
Total Estimated Growth	155,059	42,467	540
Previous Est (05/06)	164,330	160,039	2,308
Pipeline Projects	0	0	0
Remaining Growth	155,059	42,467	540

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	0.0	25.0	12.0

**What's Changed?**

Station area remains largely undeveloped with little change in the surrounding areas. Downtown Matthews continues to strengthen as a local town center.

**Key Considerations:**

- Large property holdings and support from town should aid development of property, although significant infrastructure investment needed given greenfield location and limited access of site.
- Retail opportunities likely to be limited given expected low traffic volumes and limited visibility of site. Office perhaps a stronger use.
- Residential opportunities may be stronger than indicated, with additional opportunities existing for non-TOD product and extended TND.
- Town also planning development of recreation and entertainment facilities.

Allocated Growth					
	Office	Retail	Employment	High-Density Residential	Population
Base Year			2214		443
Increase 2008 - 2015	21,250	11,576	99	0	0
Increase 2015 - 2025	64,641	15,335	251	205	377
Increase 2025 - 2035	69,169	15,556	266	335	617
<b>Total</b>	<b>155,059</b>	<b>42,467</b>	<b>2,830</b>	<b>540</b>	<b>1,437</b>

Allocation by TAZ					
11065		10867			
Emp	Pop	Emp	Pop	Emp	Pop
1,974	0	240	443		
79	0	20	0		
201	286	50	72		
213	469	53	117		
<b>2,467</b>	<b>755</b>	<b>363</b>	<b>632</b>	<b>0</b>	<b>0</b>



CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 70  
 Recommended Development and Land Use Program  
 Southeast Corridor--CPCC Station



	Office	Retail	High Res
Total Estimated Growth	372,885	89,019	437
<i>Previous Est (05/06)</i>	<i>589,005</i>	<i>80,455</i>	<i>824</i>
Pipeline Projects	162,000	65,000	57
Remaining Growth	210,885	24,019	380

TSD Acres Needed for Growth Beyond Pipeline	M	R	E
	5.5	12.0	13.0

**What's Changed?**

Station area remains largely undeveloped, with the exception of the CPCC campus. Hendrick rezoning has largely not come to fruition as of yet and may be less certain pending the impacts of the current recession on auto dealerships/industry.

**Key Considerations:**

- While adjacent to I-485, access is very challenging to the site, particularly in the short-term, and thus retail represents a fairly limited opportunity.
- Office represents a somewhat stronger opportunity, siphoning some demand from the South side.
- Given abundance of auto dealerships, establishing residential base may be somewhat challenging and will likely be more limited overall.

Allocated Growth					
	Office	Retail	Employment	High-Density Residential	Population
Base Year			590		138
Increase 2008 - 2015	52,401	23,185	230	0	0
Increase 2015 - 2025	114,075	31,318	454	102	188
Increase 2025 - 2035	206,408	34,516	765	335	617
<b>Total</b>	<b>372,885</b>	<b>89,019</b>	<b>2,039</b>	<b>437</b>	<b>944</b>

Allocation by TAZ					
11067		10869			
Emp	Pop	Emp	Pop	Emp	Pop
497	9	93	129		
115	0	115	0		
227	89	227	89		
383	293	383	293		
<b>1,222</b>	<b>392</b>	<b>818</b>	<b>512</b>	<b>0</b>	<b>0</b>



CITY OF CHARLOTTE  
ESTIMATED DEVELOPMENT POTENTIAL  
FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

Exhibit 71  
SUMMARY OF PIPELINE PROJECTS BY TRANSIT CORRIDOR

Corridor	Station Area	Project Name	Acres	Units					Office	SF	
				Res Units	Apts	Condos	Towns	SFD		Retail	Other
North	Harris	Griffith Lakes	395	2,800	776	216	892	916	578,000	361,500	
North	Eastfield	Courtyard by Marriott	1								119
North	Eastfield	Gandy Communities site	213	975	350		250	375			
North	Eastfield	Twin Lakes--remaining properties	120								
North	Hambright	Bryton	500	3,000	3,000				1,500,000	1,000,000	
North	Huntersville	Downtown Museum Project							45,000	15,000	
North	Sam Furr/Caldwell	Unnamed--Harris Properties	56	950	800		150		130,000	100,000	
North	Cornelius	Antiquity	131	1,200	520	280	100	300	100,000	200,000	
<b>Total, North Corridor</b>			<b>1,416</b>	<b>8,925</b>	<b>5,446</b>	<b>496</b>	<b>1,392</b>	<b>1,591</b>	<b>2,353,000</b>	<b>1,676,500</b>	<b>119</b>
Northeast	16th	Bloc 90	2	90		90					
Northeast	27th	Noda @ 27th Street		200	200				31,000	9,000	
Northeast	27th	28th RO									
Northeast	36th	Mercury NoDa		125		125					
Northeast	36th	Fat City Lofts				X					
Northeast	36th Street	Gateway Village	10	340	340						
Northeast	City Boulevard	Belgate	168	720	720					727,500	
Northeast	Mallard Creek	Pinnacle Point	27						200,000	58,000	130,000
Northeast	Tom Hunter	Nations Square								X	
Northeast	Tom Hunter	Unnamed S/C								X	
Northeast	McCullough	Phillips University Center		392	392					15,000	
Northeast	University City Blvd	University Point S/C								325,000	
<b>Total, Northeast Corridor</b>			<b>208</b>	<b>1,867</b>	<b>1,652</b>	<b>215</b>			<b>231,000</b>	<b>1,134,500</b>	<b>130,000</b>
Southeast	Elizabeth	Elizabeth Avenue	24	850	850				450,000	250,000	
Southeast	Pecan	1212 Pecan	0							4,477	
Southeast	Pecan	Elizabeth Square Apartments									
Southeast	Pecan	Office/retail building on Central									
Southeast	Pecan	Central 27									
Southeast	Pecan	Plaza Vu									
Southeast	Briar Creek	Doral Apts	19	446	350		96			26,682	
Southeast	Briar Creek	Briar Creek Townhouses	1	28			28				
Southeast	Amity Gardens	Wal-Mart								155,000	
Southeast	Sardis North	Fairfield Inn	3								155
Southeast	CPCC	Hendrick Automall		60	60				162,000	65,000	
<b>Total, Southeast Corridor</b>			<b>47</b>	<b>1,384</b>	<b>1,260</b>		<b>124</b>		<b>612,000</b>	<b>501,159</b>	<b>155</b>



CITY OF CHARLOTTE  
 ESTIMATED DEVELOPMENT POTENTIAL  
 FOR TRANSIT CORRIDORS & ACTIVITY CENTERS

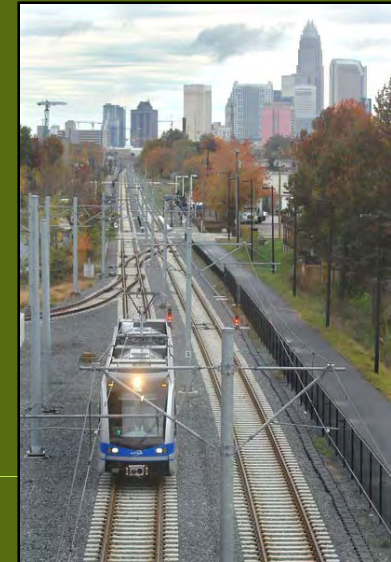
Exhibit 71  
 SUMMARY OF PIPELINE PROJECTS BY TRANSIT CORRIDOR

Corridor	Station Area	Project Name	Acres	Res Units	Apts	Units			SFD	SF		
						Condos	Towns	SFD		Office	Retail	Other
South	South End	1200 South Blvd	3	250	250					250,000	12,000	160
South	South End	1327 S. Mint	2							50,000		
South	South End	Dilworth Inn	0									75
South	South End	230 W. Summit								64,000		
South	South End	Tremont/Euclid	1	52		52						
South	South End	1927 S. Tryon								82,000		
South	South End	Ashton South End		310	310							
South	South End	The Block at Church	7	83			83					
South	South End	Bonded Distribution	4	341	341							
South	South End	Chelsea at South End		75	75						8,000	
South	South End	Circle at South End		370	370						8,000	
South	South End	Greenhawk Project	22	600	600					50,000	35,000	
South	South End	Lowes	12								174,200	
South	South End	Millenium	3	272	272							
South	South End	Reserve at South End		300	300						10,000	
South	South End	Southborough		67		67						
South	South End	SouthEnd Showplace									32,000	
South	South End	South Haus		198	198						30,000	
South	South End	Spectrum		331	331							
South	South End	Harris Properties Project	1							50,000		
South	New Bern	Silos at South End	11	975	975					160,000	40,000	
South	Scaleybark	Pappas Project	16	500	500					80,000	15,000	
South	Scaleybark	Greenhawk Project	7	424	424							
South	Arrowood	Arrowood	58	1,000	700		300					
<b>Total, Southeast Corridor</b>			<b>147</b>	<b>6,148</b>	<b>5,646</b>	<b>119</b>	<b>383</b>			<b>786,000</b>	<b>364,200</b>	<b>235</b>





# City of Charlotte Estimated Development Potential For Transit Corridors & Activity Centers 2008 – 2035



April 2009

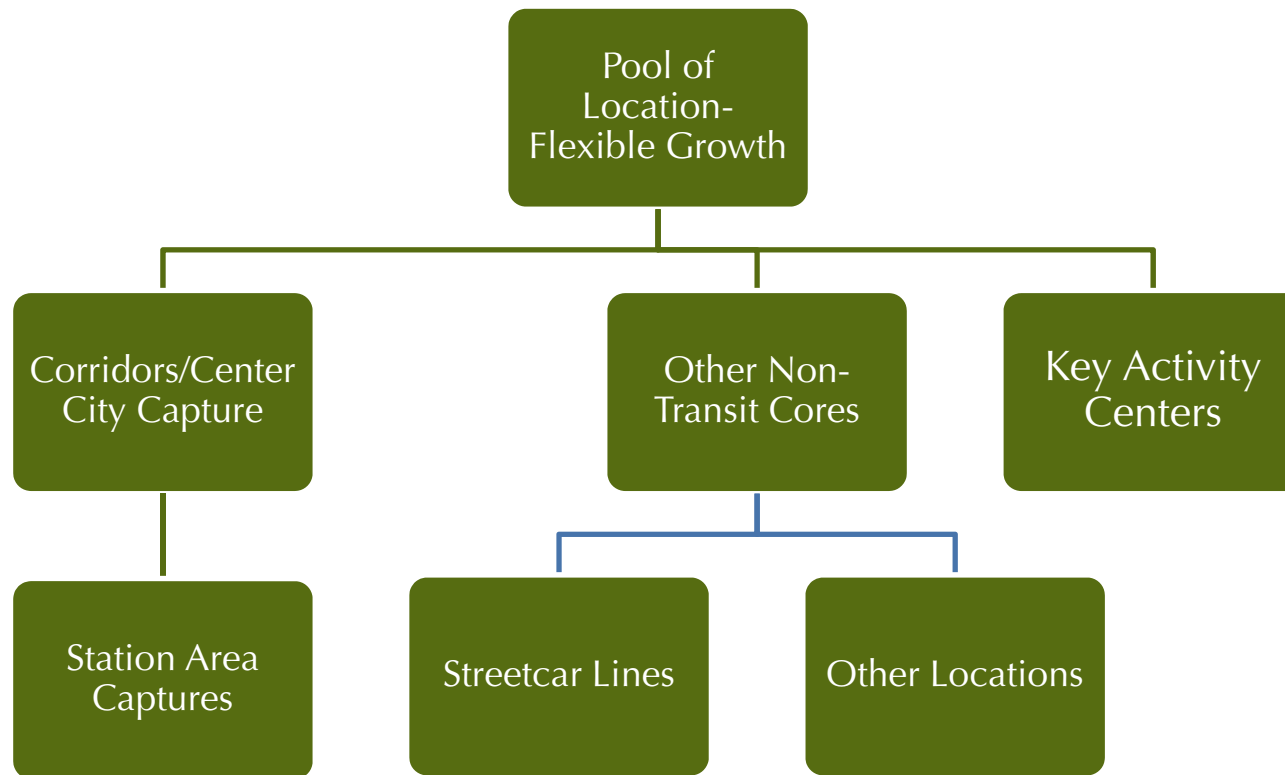


# Process Review

- Build on previous efforts for five corridors
  - Location-flexible growth study
- Adding 9 activity centers and streetcar corridors
- 2008 – 2035 estimations
- Office, retail, higher-density housing in 41 station areas, 9 activity centers, streetcar corridors
- Estimates of new employees, new population, and acres needed for TSD development
  - Less already-approved/developing pipeline projects

# Process—Cuts and Captures

Upon reviewing data at deeper look, activity centers are achieving higher rates of capture and performing stronger than corridors/other areas—looked at them as more equals to stronger than corridors today and going forward



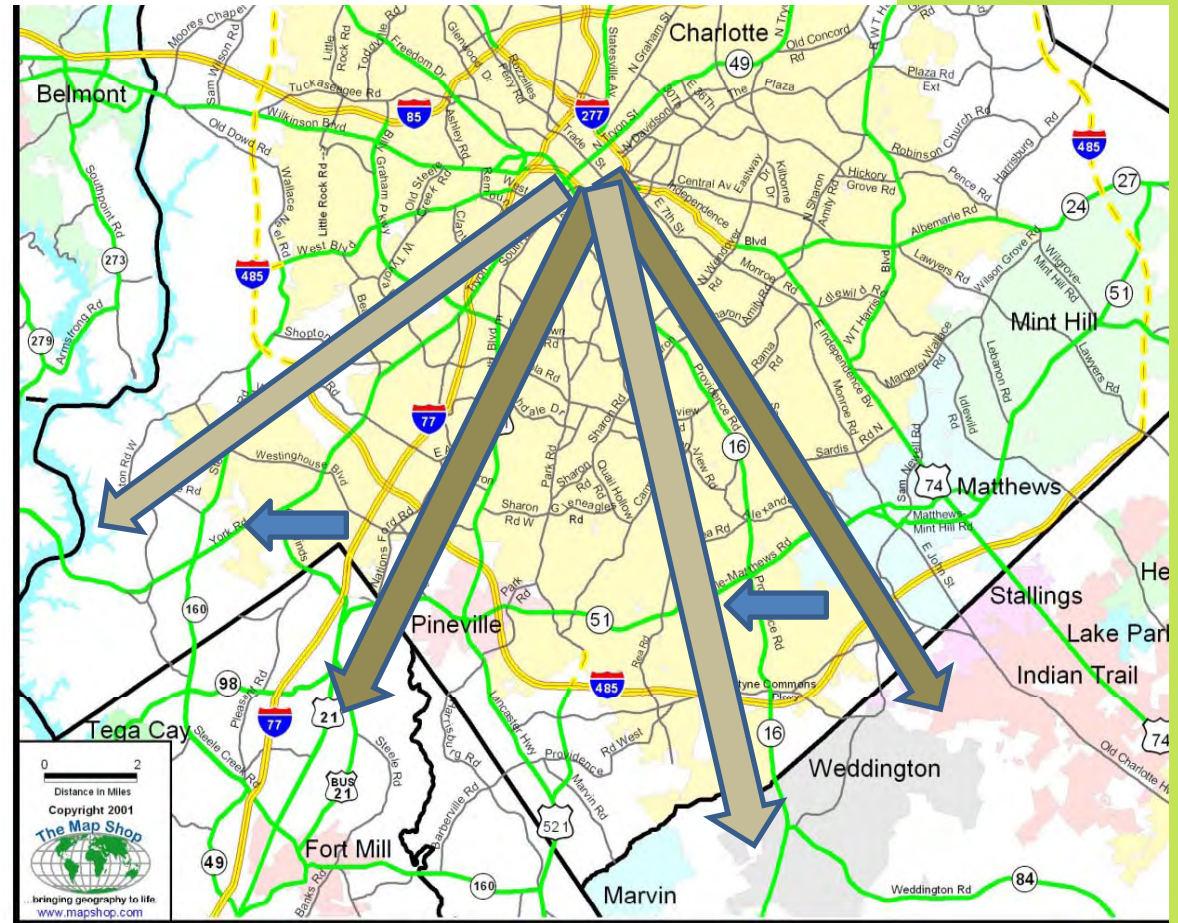
# Major Assumptions

- Growth estimates for employment, population and housing provided by CMPD
  - More moderate than those utilized previously by Hammer
  - Charlotte economy will respond positively following current recession and banking isn't dead
- Breakout of employment by type based on Lee Institute numbers
- Utilized previous RCLCO assumptions for location-flexible households, but only for SFD
  - Included all multifamily (owner or renter) development as eligible given now including activity centers and greenfield station areas
- Preferences for attached will increase over time as single-family increasingly shifts out of county in coming years/decades



# Major Issues Guiding Growth

- Major growth corridor (south) shifting more to the southwest
  - I-485
  - York County
  - Union policies
- West of I-77 more acceptable

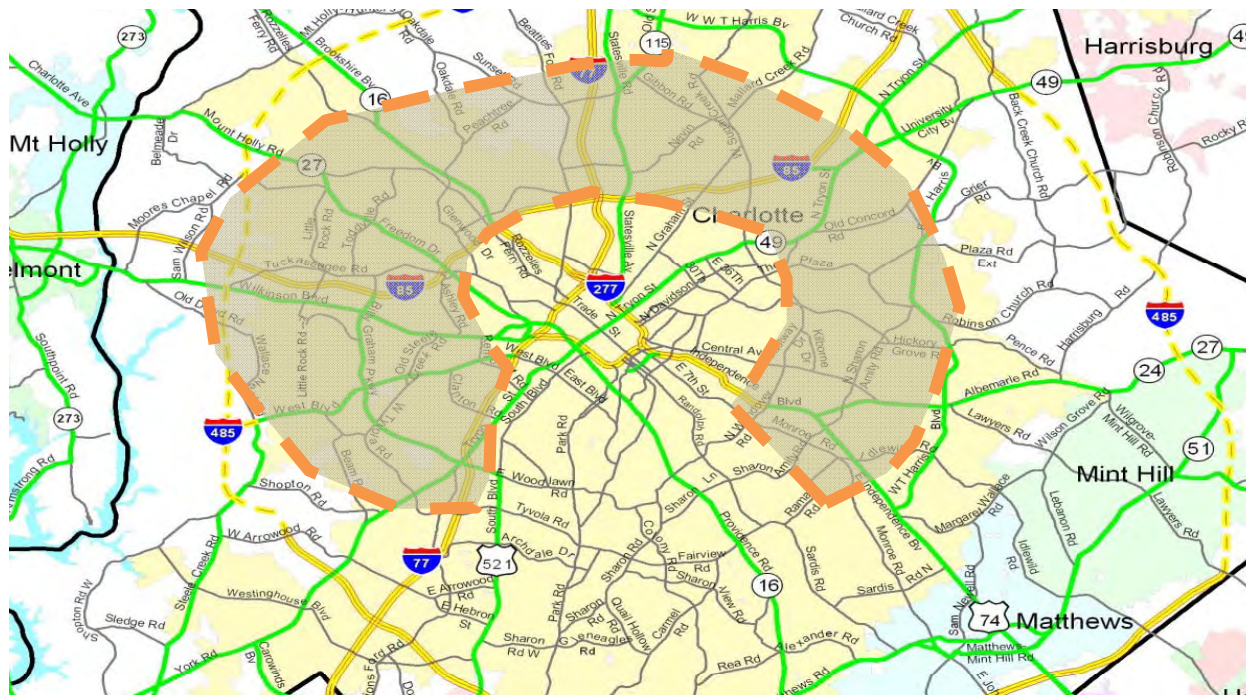


# Major Issues Guiding Growth

- Re-emergence of intown & Center City
  - Now 20% of new home sales above \$300k
  - Doubled capture of all new home sales
  - Home price appreciation strongest in county
- Office demand still dominated by Center City south
  - Central, South & SW account for 69% of office growth since 2000
  - Center City still nearly 25% of demand
  - Ballantyne dominant, but growth shifting to Whitehall

# Major Issues Guiding Growth

- With the exception of south Charlotte (Southpark), older suburbs struggling





# Major Issues Guiding Growth

- Struggling Inner Suburbs
  - Not intown, not greenfield
  - Growing share of region's lower incomes
  - Negative HH income growth this decade
  - How to encourage redevelopment?
    - Create value through new quality-of-life infrastructure

Area	Households <\$35,000			Households >\$150,000			Median HH Income		
	2000	2008	Annual Change	2000	2008	Annual Change	2000	2008	Annual Change
Inner City	26,376	24,997	<b>(13.81)</b>	3,099	3,910	<b>8.34</b>	\$33,962	\$36,685	<b>0.55</b>
Inner Suburbs (less South)	26,659	28,980	<b>1.81</b>	806	948	<b>0.11</b>	\$40,162	\$40,074	<b>(0.02)</b>
Inner South	9,601	9,334	<b>(0.79)</b>	6,652	7,791	<b>3.45</b>	\$67,817	\$70,956	<b>0.64</b>
Greenfield Suburbs	24,085	34,483	<b>1.21</b>	8,679	16,934	<b>0.98</b>	\$66,120	\$71,458	<b>1.08</b>



# Major Issues Guiding Growth

- Northside Office Market Shifting to I-77
  - University Area
    - Northeast lacking in executive households
    - URP snagging mostly back-office BTS
    - East of 85 market has always struggled
  - I-77
    - Greater share of executive housing
    - While small, capturing more of multi-tenant market
    - More diverse retail base
    - Two new interchanges along I-485

# Major Issues Guiding Growth

- Activity Centers Dominant over Corridors
  - Center City, Ballantyne with strongest residential
  - URP, Center City, Ballantyne, Whitehall lead office
  - Northeast Corridor dominant w/ new multifamily
  - Corridor retail more scattered (S. End, Matthews)

Captures	Activity Centers	Corridors
Office	66%	7%
Retail	27%	18%
Residential	14%	12%
Multifamily	25%	19%
Single-Family	6%	12%

# Where Will the Growth Occur?

- Activity Centers & Transit Corridors gain market share across all land uses
- Wedges still attractive for majority of residential growth, but losing share to more dense, walkable, and efficient areas

Area	2000 - 2007	2008 - 2035
<b>Activity Centers</b>		
Residential	14.2%	18.1%
Office	66.2%	59.7%
Retail*	26.6%	24.6%
<b>Transit Corridors</b>		
Residential	11.8%	23.0%
Office	7.2%	18.5%
Retail	17.8%	28.5%
<b>Wedges</b>		
Residential	74.1%	58.9%
Office	26.6%	21.8%
Retail	55.6%	46.9%

# Residential Shifts

- Attached residential to account for 50% of new development in coming 27 years
  - 60% of that to occur in activity centers and transit corridors
  - 80% of single-family detached to locate in wedges

Product	2000 – 2007	2008 – 2035
Attached (rental & for-sale)	41.7%	49.5%
Single-family detached	58.3%	50.5%

Area	Product	2000 – 2007	2008 – 2035
Activity Centers	Detached	3.6%	4.1%
	Attached	10.6%	13.2%
Transit Corridors	Detached	5.0%	5.5%
	Attached	6.8%	17.8%
Wedges	Detached	49.7%	40.9%
	Attached	24.4%	18.6%



# Historic & Future Captures--Office

- Corridors double capture while Activity Centers stay focus of attention

Area	Capture, 2000 – 2007	Projected Capture, 2008 - 2035
Activity Centers	66.2%	59.7%
Four Corridors	7.2%	18.5%
South Corridor	2.1%	3.8%
North Corridor	2.1%	5.0%
Northeast Corridor	1.1%	5.8%
<del>Southeast Corridor</del>	<del>1.9%</del>	<del>3.9%</del>
Total, Centers & Corridors	73.4%	78.2%

# Historic & Future Captures--Retail

- Opportunities for retail estimated to increase around corridors and in activity centers
  - Shifts in retail development support more central/accessible locations

Area	Capture, 2000 – 2007	Projected Capture, 2008 - 2035
Activity Centers*	26.6%/20.0%	24.6%
Four Corridors	17.8%	28.5%
South Corridor	3.5%	6.0%
North Corridor	3.4%	9.0%
Northeast Corridor	3.8%	9.5%
<del>Southeast Corridor</del>	<del>7.1%</del>	<del>4.0%</del>
Total, Centers & Corridors	44.4%/37.8%	53.1%

\* Includes Northlake Mall at more than 1.2 million square feet of space.

# Historic and Future Captures--Residential

- Four transit corridors expected to greatly increase captures in coming years
  - Activity centers should also show increased captures in future

Area	Capture, 2000 – 2007	Projected Capture, 2008 - 2035
Activity Centers	14.2%	18.1%
Four Corridors	11.8%	23.0%
South Corridor	2.0%	7.7%
North Corridor	5.9%	5.9%
Northeast Corridor	3.3%	5.2%
<del>Southeast Corridor</del>	<del>1.3%</del>	<del>4.2%</del>
Total, Centers & Corridors	26.0%	41.1%

# Activity Center Summary

- Greater intensification expected throughout
- Access & centrality become all the more important
- Residential growth will help offset jobs/ housing imbalance in coming decades
  - Expected to be under 2.16 for all cores except Cotswold
- Ballantyne, Center City, Whitehall & URP will see greatest commercial and residential growth
- More limited potential for Cotswold, Coliseum & Steele Creek
- Southpark in between, but constrained by land availability & prices
- Retail will see more local-serving uses with growing residential bases



# Activity Center Summaries

- Center City
  - Continued strong office & residential growth, but tempered somewhat by banking impacts and competition with surrounding neighborhoods
  - Retail opportunities also strong but likely to be satisfied in part outside of I-277
- Northlake
  - Growing office and retail core (2MM sf office)
  - Competition from Bryton /Eastfield will temper growth
  - Abundant greenfields in place
- URP
  - Too much office land & need to diversify park itself
  - Mostly build-to-suits as lack of executive housing a major issue
  - Losing some market share to I-77 corridor going forward

# Activity Center Summaries

- Southpark
  - Dominant executive location, but land constrained
  - Will see around 2.4MM sf of new office space & 500k+ retail space
  - Strong residential infill, although high pricing will temper demand
- Cotswold
  - Badly land constrained and neighborhood core
  - Limited office and retail potential
  - Residential stronger, but nowhere to go
- Ballantyne
  - Huge advantages (ownership, location, prestige)
  - Interest/willingness to intensify?
  - Missed retail opportunities—future opportunity?

# Activity Center Summaries

- Coliseum
  - CityPark critical to long-term success
  - Weak housing in area hurts attractiveness
  - Really undermined by Whitehall long-term
- Whitehall
  - Benefits from location between airport & execs
  - Retail and housing long-term concerns
  - Intensification likely over time
- Steele Creek
  - Limited regional access, so likely a neighborhood/district core

# South Corridor Summary

- Strongest opportunities remain in intown stations (inside Route 4)
  - South End
  - New Bern
  - Scaleybark
- I-485 Station has high of potential—underutilized today
- Growth estimates more modest for Woodlawn to Sharon West
  - No anchors, varying access, a lot to clean up
- Continue to invest park & infrastructure \$\$\$ into area
- Value creation from Tyvola south a major focus
  - Linear park and greenway system should be considered, along with greater pedestrian orientations.



# South Corridor Detail

	Current Study			Glating/RCLCO Allocations		
	Office	Retail	Residential	Office	Retail	Residential
South End	657,916	386,670	4,241	NA	NA	NA
New Bern	163,236	<b>59,250</b>	<b>1,580</b>	173,628	250,000	975
Scaleybark	161,206	53,007	<b>1,567</b>	165,360	50,000	927
Woodlawn	<b>315,411</b>	<b>168,138</b>	<b>1,142</b>	689,000	300,000	1,855
Tyvola	<b>474,596</b>	<b>176,659</b>	2,017	909,480	250,000	1,855
Archdale	22,628	<b>51,854</b>	789	0	100,000	795
Arrowood	56,692	<b>48,941</b>	<b>1,481</b>	46,852	150,000	700
Sharon West	29,599	54,323	<b>1,333</b>	70,278	25,000	927
I-485	209,688	147,765	2,266	NA	NA	NA
<b>Total Corridor</b>	<b>2,090,972</b>	<b>1,146,607</b>	<b>16,417</b>	<b>2,054,598</b>	<b>1,125,000</b>	<b>8,034</b>

# North Corridor Summary

- Small towns create strong residential pull
- Bryton & Eastfield can become major office, retail, and residential anchor
  - May be too much retail--cannibalization likely to occur
- Harris not as strong of a location
  - Harris Lakes may need to adjust space over time as competition from Northlake, Bryton/ Eastfield will temper opportunities
- Eastfield: Gandy purchasing more land for TSD growth
- Sam Furr opportunities tempered by east-west access
- Cornelius/Antiquity: May have a little too much retail space—can adjust over time

# North Corridor Detail

	Current Study			Glattig/RCLCO Allocations		
	Office	Retail	Residential	Office	Retail	Residential
Derita	11,962	84,530	447	29,011	69,470	1,070
Harris	386,372	210,770	1,581	561,304	139,848	993
Eastfield	641,885	347,156	2,013	617,071	124,836	982
Hambright	1,219,376	694,311	2,920	NA	NA	NA
Huntersville	105,128	60,821	1,274	90,184	55,774	832
Sam Furr	184,116	98,954	1,473	27,320	98,114	1,557
Cornelius	138,205	147,360	1,530	24,524	328,421	974
Davidson	152,079	71,817	1,380	0	95,200	414
<b>Total Corridor</b>	<b>2,839,124</b>	<b>1,715,718</b>	<b>12,618</b>	<b>1,349,384</b>	<b>911,663</b>	<b>6,522</b>

\* Note: Add'l residential may occur in greenfield areas such as Eastfield, Hambright, and Caldwell Station in a more conventional single-family format and is not included in this analysis.

# Northeast Corridor Summary

- Intown station areas strengthening (16<sup>th</sup>, 27<sup>th</sup>, 36<sup>th</sup>)
- Sugar Creek, Old Concord, Tom Hunter struggling
  - Sharply decreased office & residential potential
- City Boulevard major retail core—office to retail
  - Likely to cannibalize Highway 49
- University City area in need of North Tryon makeover to regain/maintain growth position
  - Area not seeing as much upside, office may be challenged in future
- UNCC likely student housing and Mallard Creek Church tempered by location off of N. Tryon
  - Encourage student housing development proximate to other stations too



# Northeast Corridor Detail

	Current Study			Glating/RCLCO Allocations		
	Office	Retail	Residential	Office	Retail	Residential
Parkwood	<b>128,857</b>	79,047	<b>1,139</b>	222,679	22,381	263
27 <sup>th</sup> Street	97,642	44,308	<b>1,027</b>	129,443	45,481	904
36 <sup>th</sup> Street	129,277	<b>108,628</b>	<b>1,631</b>	130,471	36,033	538
Sugar Creek	<b>34,792</b>	83,447	<b>377</b>	267,637	110,895	833
Old Concord	<b>33,570</b>	107,009	<b>448</b>	223,911	92,678	936
Tom Hunter	<b>33,570</b>	<b>47,421</b>	<b>448</b>	150,299	91,238	1,215
City Boulevard	<b>270,587</b>	<b>716,137</b>	<b>1,454</b>	489,044	150,757	1,823
McCullough	<b>411,629</b>	102,290	<b>1,086</b>	546,957	140,124	1,499
JW Clay Blvd	<b>434,881</b>	86,825	<b>1,658</b>	740,494	71,752	841
UNC Charlotte	0	0	413	NA	NA	NA
Mallard Crk Ch	<b>1,344,129</b>	<b>119,590</b>	<b>1,017</b>	290,114	60,514	683
I-485/N. Tryon	149,682	<b>320,318</b>	<b>846</b>	220,196	103,272	1,388
Total Corridor	3,068,617	1,815,021	11,543	3,191,049	925,195	10,623

# Southeast Corridor Summary

- Elizabeth & Pecan
  - Strongest growth potential in corridor
- Briar Creek & Amity Gardens
  - Benefit from intown location, but midblock stations temper commercial
- Sharon Amity to Village Lake
  - Areas not keeping up and strategies to create greater value needed
- Sardis to NC 51
  - Good opportunities with vacant land, redeveloping under-developed properties, although NC 51 tough to squeeze in
- Matthews TOD/CPCC
  - Moderate longer-term opportunities
- Big Consideration
  - Convert Independence to freeway and create major linear park w/ density at major cross-roads

# Southeast Corridor Detail

	Current Study			Glatting/RCLCO Allocations		
	Office	Retail	Residential	Office	Retail	Residential
Elizabeth	248,348	151,792	1,412	72,255	23,122	255
Pecan	126,195	81,200	1,431	91,258	80,063	1,140
Briar Creek	60,881	11,549	841	174,345	69,661	886
Amity Gardens	135,347	116,031	747	137,388	83,095	1,115
Sharon Amity	76,807	17,747	470	86,412	85,604	1,190
Conference Drive	51,699	28,503	416	59,361	98,097	1,449
Village Lake	159,565	37,146	483	142,278	103,568	1,436

# South Corridor Detail, cont

	Current Study			Glatting/RCLCO Allocations		
	Office	Retail	Residential	Office	Retail	Residential
Sardis North	301,290	103,281	908	186,459	161,050	2,288
Independence Pointe	120,752	49,560	522	104,054	62,164	1,248
Highway 51	389,683	62,220	697	481,042	98,959	1,167
Matthews TOD	155,059	42,467	540	164,330	160,039	2,308
CPCC	372,885	89,019	437	589,005	80,455	824
<b>Total Corridor</b>	<b>2,198,511</b>	<b>790,515</b>	<b>8,904</b>	<b>2,288,187</b>	<b>1,105,337</b>	<b>15,306</b>

\* Note: Add'l residential may occur in greenfield areas such as Sardis North, Matthews TOD, and CPCC in a more conventional single-family format and is not included in this analysis.



# Streetcar Assessment

- Central offers the strongest potential
  - Particularly inside of Eastway
  - Eastland redevelopment critical to areas east of Eastway
- Wilkinson strongest close to Center City
  - I-77 to Ashley strong for residential & office
  - Beyond Ashley fundamentals weaken significantly
- Beatties Ford tougher challenge
  - Lack of vacant properties and larger lots tough
  - Areas around interstates strongest for redevelopment—particularly between Johnson C. Smith and Center City

# Streetcar Detail

	Current Study		
	Office	Retail	Residential
Central net of Elizabeth/ Pecan	135,579	358,572	2,543
Central with Elizabeth/ Pecan	494,671	591,564	5,091
Wilkinson Boulevard	631,871	156,752	2,218
Beatties Ford	86,310	124,450	944
<b>Total Streetcar Corridors</b>	<b>1,212,852</b>	<b>872,766</b>	<b>8,253</b>

\* Note: Add'l residential may occur in greenfield areas such as Sardis North, Matthews TOD, and CPCC in a more conventional single-family format and is not included in this analysis.

# Available Growth Consistent w/ Previous Emp Allocations—Lower on Residential Side

- Previous Studies:
  - RCLCO Malleability: Much smaller pool of employment but more household growth compared to this time around.
  - Glatting: Allocations were much higher than that study and are generally consistent to slightly higher than pool this time around

	Employment	Households
RCLCO Malleability Study	2,184	3,235
Glatting Station Allocations*	4,647	1,955
Current Study (sans activity centers)	4,401	1,560

\* Includes RCLCO South results, but not West Corridor estimates, and for ¼-mile around stations.