

# Preliminary Land Use Programs

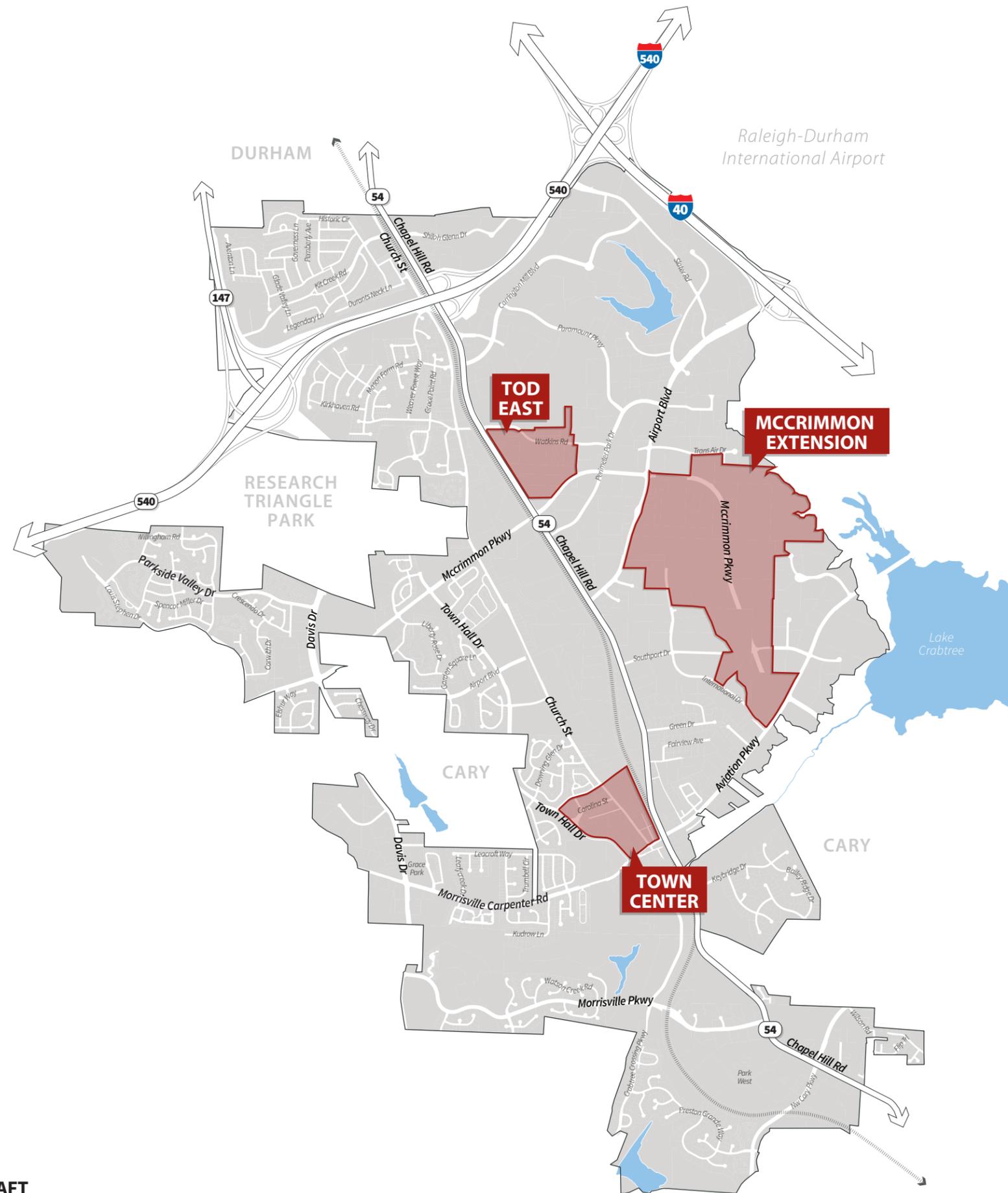
As part of the Morrisville Land Use Plan, Subarea Plans have been developed that focus on three key areas of the community. These Subarea Plans include more detailed, site specific analysis and recommendations, intended to address issues and opportunities within each subarea. Further, the Subarea Plans demonstrate how overarching themes and recommendations of the Land Use Plan are applied to specific districts and properties within the Town. The three subareas being addressed are:

**Town Center** – including the properties roughly bounded by Town Hall Drive, Jeremiah Street, the Norfolk Southern Railroad, and Morrisville Carpenter Road.

**McCrimmon Extension** – including properties roughly adjacent to the McCrimmon Parkway extension, the majority of which are currently undeveloped.

**TOD East** – including properties south of Wake Technical Community College’s RTP Campus, roughly bounded by NC54, the college’s campus, office uses along Perimeter Park Drive, and McCrimmon Parkway.

For each of the identified subareas, Land Use Programs have been developed, including two unique alternatives. These indicate potential growth patterns that each subarea could support, guided by existing conditions, public engagement and feedback, on-going development, and market analysis. Based upon discussion with Town Staff, the Planning and Zoning Board, and the Town Council, these alternatives will be refined to provide two clearly defined concepts for how each subarea could develop in the future.



# Town Center Subarea: Alternative 1

This alternative supports activation of the Town Center as a mixed-use district that incorporates public uses, commercial retail and services, professional office space, and a variety of residential products. This mix of uses, including a dedicated public gathering space, will foster an active and vibrant district at the community's core that acts as a focal point for Morrisville.

The primary difference between the two alternatives for the Town Center Subarea is density of development. Alternative 1 would utilize surface parking exclusively, requiring each property to provide a set standard of internal parking. This will result in lower density of development as each parcel must accommodate surface parking internally. While this would alleviate the costs of consolidated parking, it may challenge the viability of attracting development based upon the size of specific parcels.

## Mixed-Use

Includes mixed-use developments with ground floor commercial and multi-family or office spaces above. Multi-family should include affordable units as appropriate. These developments should front to both Carolina Street and Church Street, with parking accommodated by rear surface lots on each property. Mixed-use investment will significantly contribute to a more urban feel in the Town Center and support activity and employment in the area. As development occurs, considerations must be given to the mix of uses to avoid the Town Center becoming a campus for exclusively public and government uses.

## Mixed Residential

Includes a mix of multi-family and single-family attached residential, intended to support activity within the subarea. Mixed residential investment is intended to buffer high-density mixed use from less intense single-family neighborhoods. Buildings should be oriented to the street, with parking accommodated on the rear of each property. Affordable units should be encouraged as part of mixed residential development.

## Single-Family Neighborhood

Includes single-family detached homes, intended to maintain the residential character along Church Street and Page Street. Historic properties should be preserved and enhanced, while the redevelopment of disinvested properties over time should be encouraged. Adaptive conversions of single-family homes over time should be allowed; however, the area's residential character should be maintained as the historic heart of Morrisville.

## Public/Semi-Public

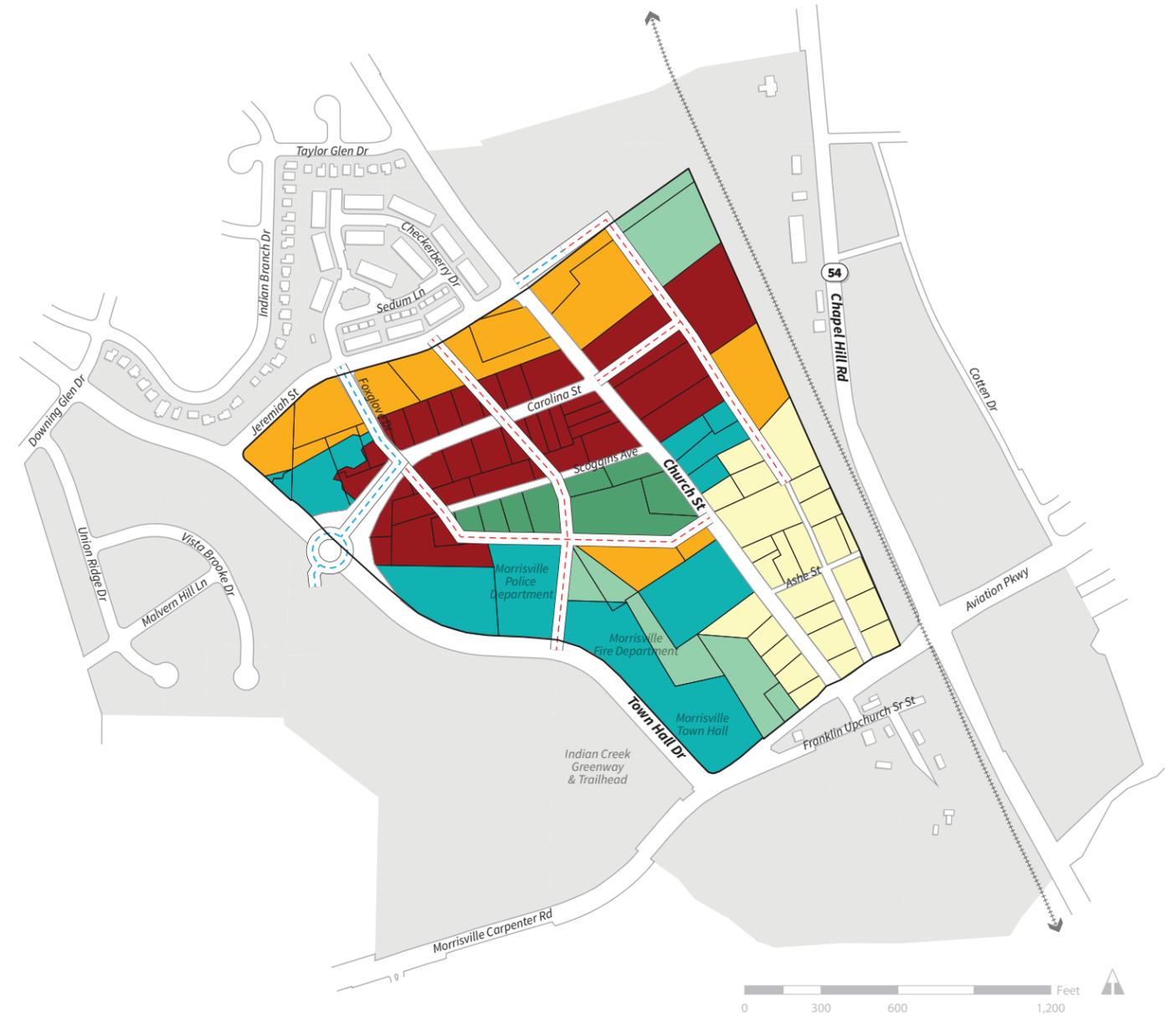
Includes existing public/semi-public uses that should be maintained as activity generators within the Town Center. This includes the Town's municipal buildings, the under construction Morrisville Library, the First Baptist Church, and the Morrisville Christian Church.

## Public Gathering Space

Identifies a dedicated public gathering space, intended to act as the core of the Town Center. This space should be adaptive and programmable to host community events and activities as well as provide recreational amenities.

## Open Space

Includes areas that should be preserved as dedicated public open space, specifically intended to support pedestrian and bicycle connections into the Town Center and enhance the character of the subarea.



## Alternative 1 Town Center

### Proposed Land Use

- Mixed-Use
- Mixed Residential
- Single-Family Neighborhood
- Public/Semi-Public
- Public Gathering Space
- Open Space
- Proposed Road Connection
- Road Under Construction

# Town Center Subarea: Alternative 2

Similar to Alternative 1, this alternative supports activation of the Town Center as a mixed-use district. Incorporating commercial, residential, office, and public uses will foster an active and vibrant district. Supporting greater density than Alternative 1, this district combines mixed-use development along Carolina Street with a public gathering space to create a larger focal point for the community.

In juxtaposition to the first alternative, Alternative 2 recommends the consolidation of parking into shared parking garages. By concentrating parking, the Town will be able to modify parking standards to allow for higher density development while still accommodating necessary parking within the subarea. This alternative will enable greater build-out of the Town Center and could yield greater tax revenue, but would require a greater upfront investment from the Town.

## Mixed-Use

Includes mixed-use developments with ground floor commercial and multi-family residential or office spaces above. Multi-family should include affordable units as appropriate. These developments should front to both Carolina Street and Church Street, with parking accommodated in off-site, shared lots or garages, allowing for higher density of development. As development occurs, considerations must be given to the mix of uses to avoid the Town Center becoming a campus for exclusively public and government uses.

## Mixed Residential

Includes a mix of multi-family and single-family attached residential, intended to support activity within the subarea. In addition, mixed residential investment is intended to act as a buffer between high-density mixed use and less intense single-family neighborhoods. These uses should utilize consolidated and shared parking; however, if parking is provided internally, it should be oriented to the rear and appropriately screened. Affordable units should be encouraged as part of mixed residential development.

## Single-Family Neighborhood

Includes single-family detached homes, intended to maintain the residential character along Church Street and Page Street. Historic properties should be preserved and enhanced, while the redevelopment of disinvested properties over time should be encouraged. Adaptive conversions of single-family homes over time should be allowed; however, the area's residential character should be maintained as the historic heart of Morrisville.

## Public/Semi-Public

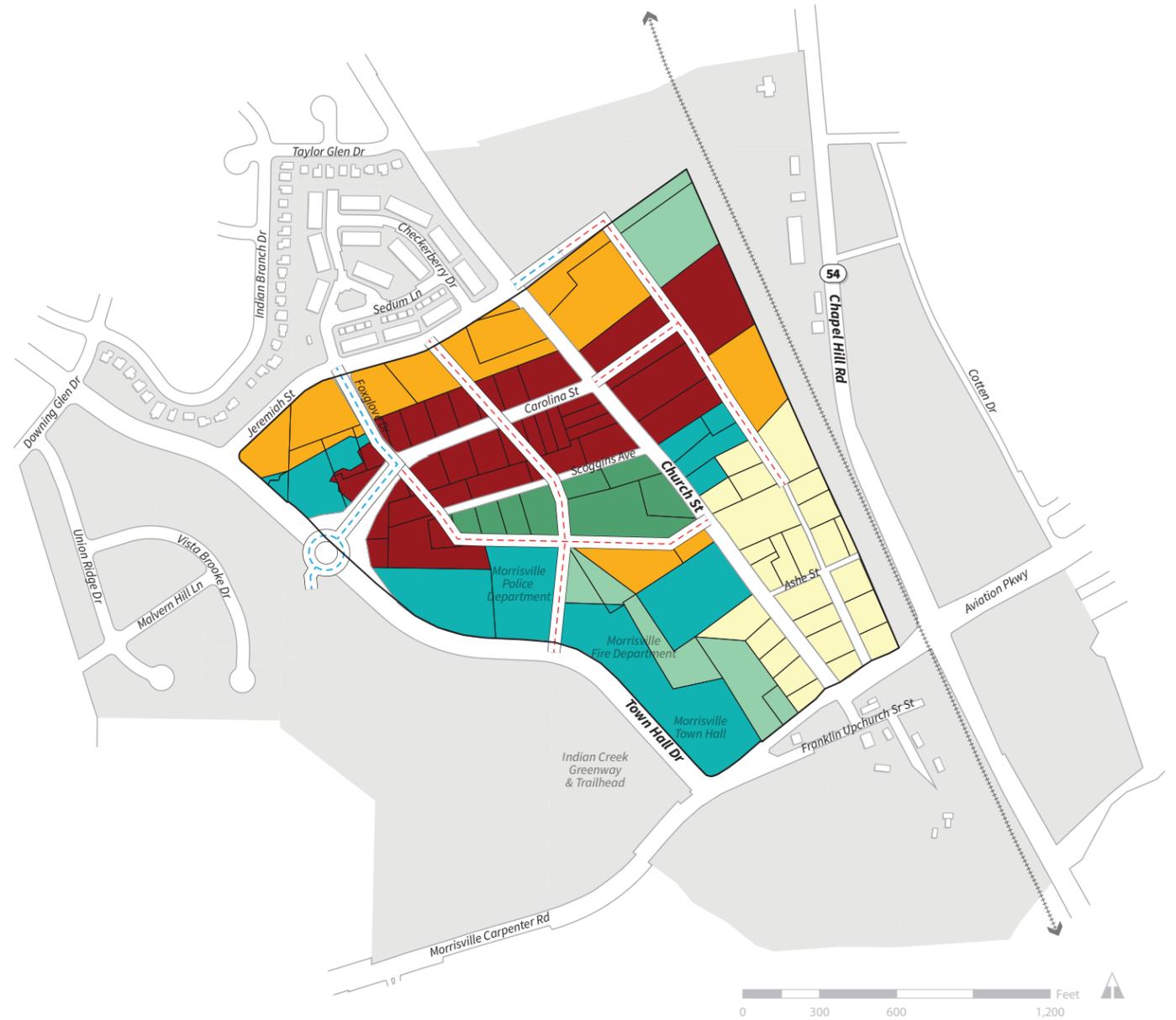
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## Public Gathering Space

Identifies a dedicated public gathering space, intended to act as the core of the Town Center. This space should be adaptive and programmable to host community events and activities as well as provide recreational amenities.

## Open Space

Includes areas that should be preserved as dedicated public open space, specifically intended to support pedestrian and bicycle connections into the Town Center and enhance the character of the subarea.



## Alternative 2 Town Center

### Proposed Land Use

- Mixed-Use
- Mixed Residential
- Single-Family Neighborhood
- Public/Semi-Public
- Public Gathering Space
- Open Space
- Proposed Road Connection
- Road Under Construction

# McCrimmon Extension Subarea: Alternative 1

*This alternative is intended to support continuing growth of the McCrimmon Extension Subarea. The identified land use designations reflect existing development patterns and enable investment that is consistent with ongoing trends. This includes a large proportion of industrial and office flex space, building upon existing heavy and light industrial, warehousing and distribution, and corporate offices surrounding and close to the subarea.*

## **Industrial & Office Flex**

Includes light and heavy industrial, warehousing and distribution, and corporate and professional offices that mirror the existing mix of developments adjacent to the McCrimmon Extension Subarea. Considerations should be given to building location and design, intensity of uses, landscaping, and other improvements to make a unified and inviting district for industry and employment.

## **Sports Complex**

Includes the Wake Competition Center and provides for appropriate southward growth of this development to Southport Drive. As a valuable amenity for the community, this use should be appropriately incorporated within the surrounding area; however, the relation to adjacent uses must be considered as development occurs over time.

## **Multi-Family**

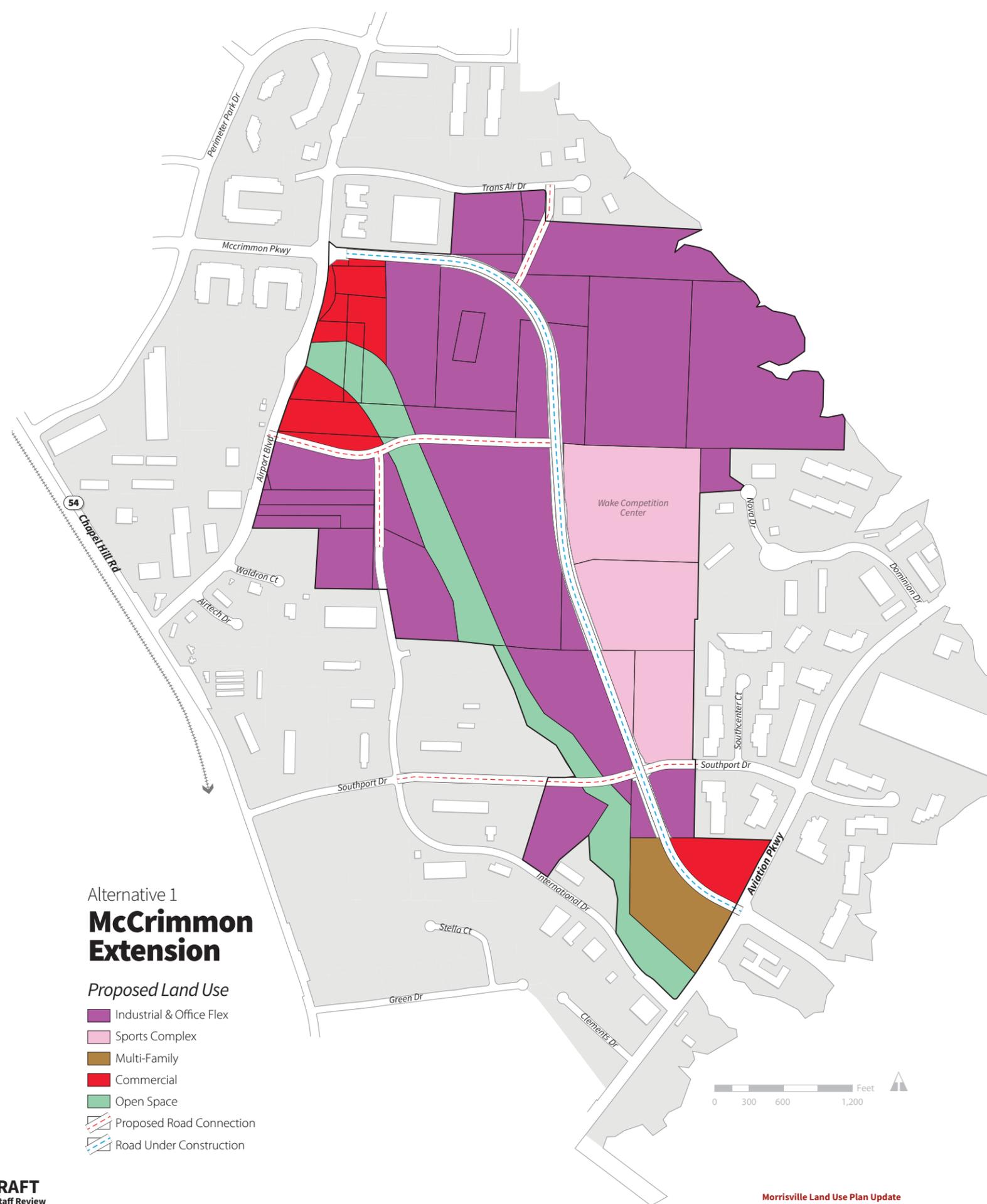
Includes the multi-family development under construction at the intersection of McCrimmon and Aviation Parkways. While the subarea could support additional multi-family, Alternative 1 does not recommend further development of this use, in compliance with the established Unified Development Ordinance Airport Overlay.

## **Commercial**

Includes opportunities for commercial businesses at the intersection of McCrimmon and Aviation Parkways and along Airport Boulevard. This should include retail and service businesses that support adjacent multi-family, industrial and office uses, and traffic moving through the area.

## **Open Space**

Includes the creek that runs through the study area and adjacent land, intended to form a greenway extending from Aviation Parkway to Airport Boulevard. This land should be appropriately protected and could be enhanced with trails that support accessibility and recreation within the area.



# McCrimmon Extension Subarea: Alternative 2

This alternative is intended to support an approach to development within the McCrimmon Extension Subarea that more directly addresses community needs that differ from the ongoing pattern of development. This includes a greater amount of multi-family residential and commercial uses that could compliment the Wake Competition Center and potentially provide workforce and affordable housing options. Combined with appropriate industrial and office growth, Alternative 2 enables a more balanced activation of the subarea.

## Multi-Family

Includes multi-family residential development along the west side of McCrimmon Parkway, intended to further diversify residential options within the community and potentially provide workforce and affordable housing within close proximity to corporate offices and other employers. Multi-family north of Southport Drive would require amendments to the Unified Development Ordinance Airport Overlay. Included in this area is the multi-family development under construction at the intersection of McCrimmon Parkway and Aviation Parkway.

## Commercial

Includes opportunities for commercial investment along Airport Boulevard and McCrimmon Parkway. Development should feature retail and service businesses, restaurants, and entertainment uses that offer commercial options and support activity within the subarea. In particular, commercial development should support multi-family residents and reinforce the Wake Competition Center as an activity generator and destination within the Town.

## Commercial & Office Flex

Includes opportunity for commercial and office development northeast of the intersection of Southport Drive and McCrimmon Parkway. This will support retail, service, and entertainment uses as well as large-scale corporate offices on unified campuses. Commercial uses should be an extension of development to the south and providing options for patrons of the Wake County Competition Center.

## Industrial & Office Flex

Includes light and heavy industrial, warehousing and distribution, and professional offices, intended to support build out of adjacent industrial areas. Considerations should be given to building location and design, intensity of uses, landscaping, and other improvements to limit impacts to lower intensity uses within the area.

## Corporate Office

Includes an opportunity for large-scale office investment, intended to support development of corporate offices or a unified campus. Considerations should be given to the design of the entire site, landscaping, and relation to adjacent uses. Establishment as a PUD may allow the most appropriate development of the site.

## Office & Multi-Family

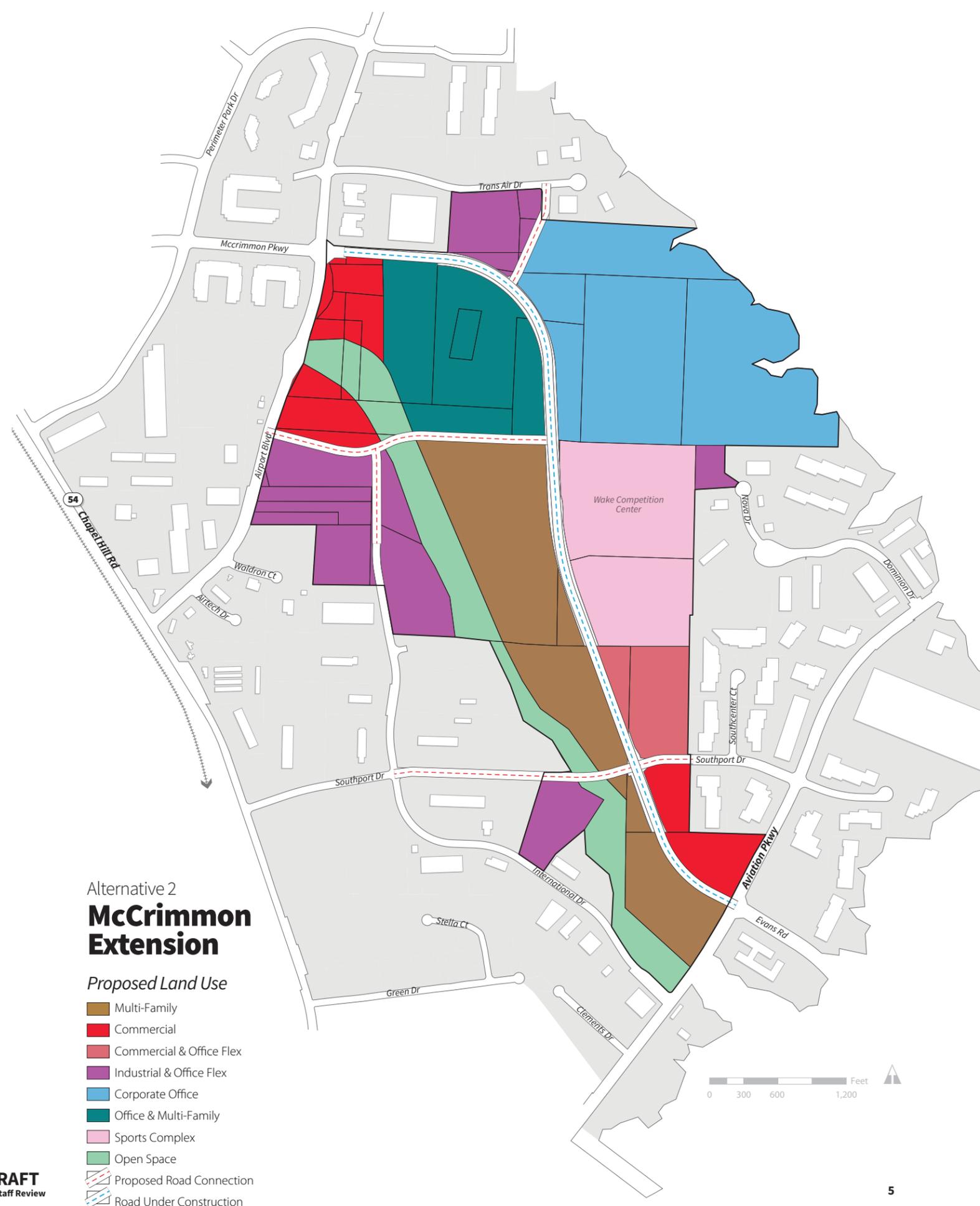
Includes opportunity for either professional office or multi-family residential development. This will be dependent upon growth and long-term development of adjacent properties within the subarea, intended to create a transition between commercial to the west, corporate office to the east, and multi-family to the south.

## Sports Complex

Includes the Wake Competition Center and provides for appropriate growth of this development. As a valuable amenity for the community, this use should be appropriately incorporated within the surrounding area; however, the relation to adjacent uses must be considered as development occurs over time.

## Open Space

Includes land that should be maintained as open space, intended to protect environmental features and act as a buffer between incompatible uses. This includes the creek that runs through the study area and adjacent land, intended to form a greenway extending from Aviation parkway to Airport Boulevard. This greenway should be enhanced with a trail network to support accessibility and recreation within the area.



# TOD East Subarea: Alternative 1

*This alternative is intended to support continuing growth of the TOD East Subarea in a manner that is consistent with ongoing development trends. The identified land use designations support continued commercial growth along NC54 (Chapel Hill Road) and extension of office uses into the area from the east. Emphasis will be placed on site design, access, landscaping, and other components that will ensure quality of development and a unified and vibrant. Roadway connections will be made to the proposed McCrimmon Flyover, taking into account grading and site configuration within the subarea.*

## Commercial

Includes opportunities for continued commercial investment along NC54 that will offer goods and services to Wake Technical Community College students and drivers moving along the corridor. The existing Welcome Federal Credit Union would be emphasized as an example for future investment, with considerations for site design, landscaping, access, and building orientation relative to NC54.

## Office

Identifies opportunities for development of professional and corporate office spaces, acting as an expansion of office uses along Perimeter Park Drive. Emphasis will be placed on continuing the campus-like appearance of adjacent office uses and further supporting Morrisville's employment base with newly developed office spaces.

## Open Space

Includes land that is best suited for preservation as public and private open space due to recommended roadway extensions and parcel reconfigurations in the subarea. This includes parcels formed by the proposed McCrimmon Parkway Flyover, which should be preserved as public open space, as well as land adjacent to the planned roadway connecting to Wake Technical Community College's RTP Campus, which should be preserved as private open space.



### Alternative 1 TOD East

#### Proposed Land Use

- Commercial
- Office
- Open Space
- Proposed Road Connection

# TOD East Subarea: Alternative 2

This alternative is intended to support a greater focus on transit oriented development within the TOD East Subarea. The alternative builds upon both anticipated transit routes along NC54 (Chapel Hill Road) and proximity to Wake Technical Community College's RTP Campus. While both commercial and office uses are still incorporated, the primary difference from Alternative 1 is the introduction of transit oriented development. This would feature a mix of commercial, office, and multi-family uses intended to activate the subarea as an extension and amenity for the RTP campus to the north and the Transit Oriented District to the west. Roadway connections will be made to the proposed McCrimmon Flyover, taking into account grading and site configuration within the subarea.

## Commercial

Includes opportunities for continued commercial investment along NC54 that will offer goods and services to Wake Technical Community College students and drivers moving along the corridor. The existing Welcome Federal Credit Union is an example for future investment, with considerations for site design, landscaping, access, and building orientation relative to NC54 (Chapel Hill Road).

## Office

Identifies opportunities for development of professional and corporate office spaces, acting as an expansion of office uses along Perimeter Park Drive. Emphasis should be placed on continuing the campus-like appearance of adjacent office uses and further supporting Morrisville's employment base with newly developed office spaces.

## Transit Oriented Development

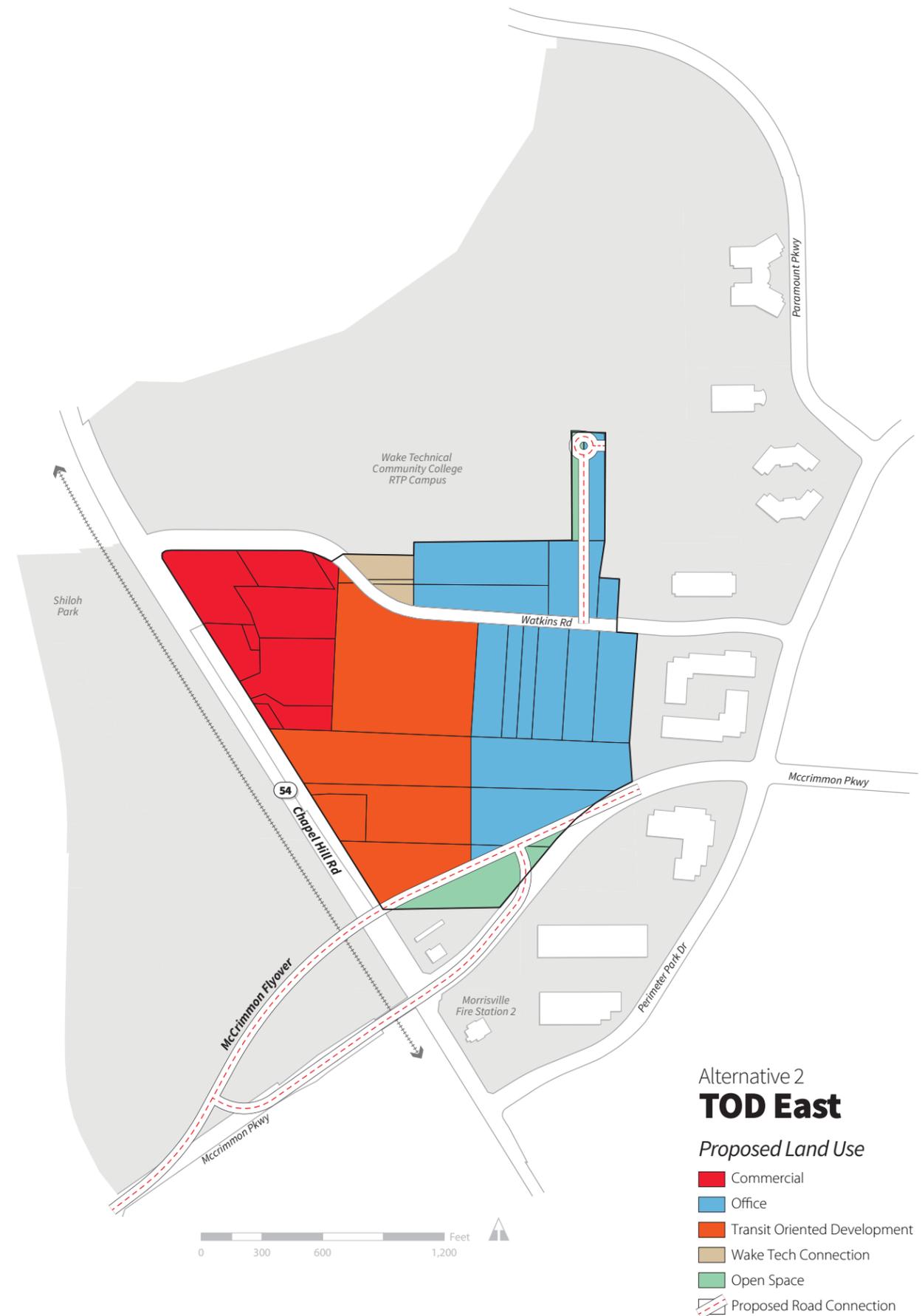
Identifies an area that is best suited for transit-oriented development (TOD), offering access to both future transit routes along the NC54 (Chapel Hill Road) corridor as well as Wake Technical Community College's RTP Campus. Development of TOD within the subarea should include mixed-use buildings featuring ground floor commercial with multi-family and office uses above, creating a vibrant and active pedestrian-oriented subarea. Further, the incorporation of multi-family development could offer housing for students and area employees, which may include workforce and affordable housing. The existing Grace Park development in Morrisville is a great example of the kind of mixed-use development preferable in this subarea.

## Wake Tech Connection

Identifies a triangular property along Watkins Road that be preserved as a potential connection between Transit Oriented Development areas south of Watkins Road and Wake Technical Community College's RTP campus to the north. This should include dedicated infrastructure for pedestrians and bicycles and could feature a pedestrian crosswalk across Watkins Road.

## Open Space

Includes land that is best suited for preservation as public and private open space due to recommended roadway extensions and parcel reconfigurations in the subarea. This includes parcels formed by the proposed McCrimmon Parkway Flyover, which should be preserved as public open space, as well as land adjacent to the planned roadway connecting to Wake Technical Community College's RTP Campus, which should be preserved as private open space.



## Alternative 2 TOD East

### Proposed Land Use

- Commercial
- Office
- Transit Oriented Development
- Wake Tech Connection
- Open Space
- Proposed Road Connection

# Market Assessment

## Multi-Family

The North Cary/Morrisville multi-family submarket is consistently among the broader Raleigh market's most active construction submarkets. Demand is driven, in part, by recently graduated young professionals arriving from nearby universities. Transplants moving to the area for new job opportunities, however, also drive demand, making the submarket somewhat dynamic, as it is not as affected by traditional, geographic market area constraints.

The submarket has total current inventory of nearly 21,000 units, with absorption at a little over 1,000 units over the past 12 months. Factoring in 869 units currently under construction and over 1,700 vacant units, there are currently approximately 31 months of existing and projected inventory available. Multi-family demand in the submarket, however, is projected to continue to grow by approximately 1,300 units, given the Raleigh area's projected population growth over the next five years. It is not unreasonable to assume that multi-family units proposed in the subarea plans could capture a significant portion of this demand. It should be noted, however, that denser subarea alternatives, specifically McCrimmon Extension Alternative #2 and Town Center Alternative #2, would most likely require buildout periods of five to 10 years.

### Population and Housing, 2010-24

Town of Morrisville

	2010	2019	2024	CAGR* 10-19	CAGR* 19-24
Population	18,576	29,170	33,946	5.1%	3.1%
Total Housing Units	8,357	12,127	13,743	4.2%	2.8%
Owner-Occupied	3,698	6,782	8,071	7.0%	3.5%
Renter-Occupied Units	3,943	4,177	4,304	0.6%	0.6%
Vacant Units	716	1,168	1,368	5.6%	3.2%

\*Compound Annual Growth Rate

Source: ESRI Business Analyst, U.S. Census Bureau

### Multi-Family Inventory, 2019

North Cary/Morrisville Submarket

	Current	5-year avg.
Vacant Units	1,769	1,405
Vacancy Rate	8.8%	7.6%
12 Mo. Absorption Units	1,024	537
Existing Units	20,984	18,561
12 Mo. Const. Starts	700	663
Under Construction	869	897
12 Mo. Deliveries	1,174	666
Absorption time (mos.)	31	51

Sources: Esri Business Analyst, U.S. Census Bureau, CoStar, and Houseal Lavigne

### Multi-Family Demand, 2019-22

North Cary/Morrisville Submarket

Population forecast (2022)	125,000
Avg. household size	2.50
Household forecast	50,000
Pct. renter occupied	46.9%
Potential demand (units)	23,446
Plus: Frictional vacancy	5.0%
Total supportable demand	22,273
Less: Existing inventory	(20,984)
Potential demand (units)	1,289

Sources: Esri Business Analyst, U.S. Census Bureau, CoStar, and Houseal Lavigne

### Office Inventory and Demand, Current

RTP/RDU Submarket

	Current	5-year avg.
12-mo. absorption (sf)	546,491	330,458
12-mo. leasing (sf)	619,436	927,851
Existing buildings	109	103
Existing sf	9,417,033	8,601,725
12-mo. constr. starts (sf)	206,382	225,384
Under construction (sf)	310,900	304,623
12-mo. deliveries (sf)	567,932	233,208
Vacancy (pct.)	2.2%	11.5%
Vacant space (sf)	207,175	989,198
Absorption time (mos.)	11	47

Sources: CoStar, Houseal Lavigne

## Office

The RTP/RDU office submarket is relatively strong, with only 11 months of existing inventory and planned deliveries currently available. The current 2.2 percent vacancy rate also underscores the health of the local office market. Recent deliveries in the RTP/RDU submarket include Perimeter Park Five and Perimeter Park Six. Perimeter Park Six includes roughly 200,000 square feet, and Relias Health pre-leased more than half of the building prior to delivery. Perimeter Park Five is fully leased by a single user and includes more than 250,000 square feet of space.

Office space has been proposed for at least one alternative for each of the three subareas. Given strong market conditions and the desirable locations of the McCrimmon Parkway and TOD East subareas, new office space in these areas should absorb relatively quickly into the marketplace. The viability of office space included in the Town Center subarea is less certain, however, as product located in mixed-use developments represents such a small portion of existing inventory. Nonetheless, the less dense development proposed in Alternative #1 could easily absorb into the market at buildout; the market viability for office proposed in Alternative #2 is less certain.

## Retail

The local retail submarket is also strong, with only 10 months of existing inventory and planned deliveries currently available. Retail space has been proposed for each of the three subareas. With annual absorption of approximately 375,000 square feet and continued population and employment growth, the proposed retail space in nearly all the subarea alternatives appears to have the necessary market support to make the developments feasible. The exception, however, would be the denser Alternative #2 for the Town Center subarea. Given the subareas limited visibility, a significant proportion of the subareas retail space would need to be supported from within the subarea. As such, the success of this denser alternative would depend, in large part, to the success of the multi-family development included in this alternative.

### Retail Inventory and Demand, Current

RTP/RDU Submarket

	Current	5-year avg.
12-mo. absorption (sf)	375,244	193,380
12-mo. leasing (sf)	69,590	60,281
Existing buildings	182	161
Existing sf	2,914,615	2,626,070
12-mo. constr. starts (sf)	165,239	105,528
Under construction (sf)	155,630	135,112
12-mo. deliveries (sf)	126,873	147,851
Vacancy (pct.)	5.0%	6.0%
Vacant space (sf)	145,731	157,564
Absorption time (mos.)	10	18

Sources: CoStar, Houseal Lavigne

## Industrial & Flex

The RTP/RDU submarket is home to more than 8.7 million square feet of industrial and flex space housed in 172 buildings. Net absorption, however, has recently not kept pace with new deliveries, indicated by negative absorption of approximately 130,000 square feet over the past 12 months. But over the past five years, absorption has averaged approximately 89,000 square feet. Industrial and flex uses have only been proposed for alternatives in the McCrimmon Extension subarea.

### Ind./Flex Inventory and Demand, Current

RTP/RDU Submarket

	Current	5-year avg.
12-mo. absorption (sf)	(130,076)	89,113
12-mo. leasing (sf)	1,062,946	755,044
Existing buildings	172	171
Existing sf	8,714,781	8,645,358
12-mo. constr. starts (sf)	-	31,814
Under construction (sf)	-	26,860
12-mo. deliveries (sf)	70,481	66,292
Vacancy (pct.)	6.2%	4.4%
Vacant space (sf)	540,316	380,396
Absorption time (mos.)	(50)	55

Sources: CoStar, Houseal Lavigne