



Regional Transit Development Plan
Strategic Corridors Analysis

Employment Access and Commuting Patterns Analysis

(Draft)

April 2010

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1.0 INTRODUCTION

1.1 Overview and Data Sources

An analysis of employment and commuting patterns was undertaken for eight counties in the Piedmont Authority for Regional Transportation (PART) region, including the counties of Alamance, Davidson, Davie, Randolph, Rockingham, Stokes, Surry and Yadkin in the state of North Carolina. Each county serves as the basis for analyzing employment, while five commute sheds (listed below) serve as the basis for analyzing commuting patterns. To provide context, a brief examination of regional employment is provided, which includes the eight counties noted above as well as Forsyth and Guilford Counties, which serve as main employment hubs in the region (a separate detailed report is being completed for Forsyth and Guilford Counties).

Employment was analyzed using employment density data that originates from a socioeconomic study undertaken for the Piedmont Triad travel demand model. The study report includes employment density data for 2002 (the study's baseline year) and for 2025 (one of the study's horizon years that was selected by PART for this report).

Work trip patterns were analyzed using commute shed data – which illustrates where work trips originate (residential areas) and terminate (commercial, institutional or industrial areas). This information can indicate where transit services are most needed, which is the ultimate goal of this effort as described in the purpose section below.

Commute shed data comes from the U.S. Census' Longitudinal Employer-Household Dynamics (LEHD) Program. This U.S. Census program combines federal and state data on employers and employees with U.S. Census data to provide a number of local and state employment data sets. The commute shed figures and tables included in this report represent primary jobs based on 2007 LEHD data. Previous PART efforts resulted in the collection of local data that identifies home-to-work travel patterns for workers of various employment centers in the region. To remain consistent with these previous efforts, these centers were maintained and are used as a basis for describing commute sheds in this report. The centers include:

- City of Greensboro Area
 - Downtown Greensboro
 - Four Seasons and Koury Center
 - Friendly Center and Wesley Long Community Hospital
- City of High Point Central Business District (CBD)
- City of Winston-Salem Area
 - Downtown Winston-Salem
 - Hanes Mall and Silas Creek Parkway
 - Wake Forest University
- Piedmont Triad International (PTI) Airport Area
 - PTI Airport
 - Support industries surrounding PTI Airport
- Town of Kernersville

For each employment center illustrated in the commute shed figures (

Figure 4-1 through **Error! Reference source not found.**), the red shaded areas depict: 1) the location of those who work within an employment center, as indicated by the presence of the shading; and 2) the concentration of these workers, as shown by the intensity of the shading.

1.2 Study Background

The Regional Transit Development Plan (RTDP) is being undertaken by PART to explore the use of sustainable, effective and efficient regional transportation system. The RTDP's purpose is to work with communities and residents of the Piedmont Triad to 1) identify ways to manage the benefits and challenges of growth, 2) recognize its impact on our region's transportation system, and 3) address these challenges in a sustainable fashion that is sensitive to residents, resources and the environment.

The RDTP includes the following elements:

- **Transit Development Plan:** This plan is evaluating urban fixed routes, paratransit, community transit systems, use of a regional bus system and intrastate connections, including bus and rail. The primary study area for this plan is Guilford and Forsyth Counties.
- **Strategic Corridors Analysis:** This plan is assessing regional economic development opportunities, community transit systems, use of regional express bus services, freight movement and safety and capacity improvements. The counties included in this study are Alamance, Davie, Davidson, Randolph, Rockingham, Stokes, Surry and Yadkin.
- **Financial Plans:** Financial plans are being prepared for both the Transit Development and Strategic Corridors Plans. The financial plans will evaluate local, state and federal funding opportunities.

PART is coordinating with the aforementioned 10 counties and the nine transit systems which operate in the Piedmont Triad to develop the RTDP.

1.3 Purpose of Employment and Commuting Patterns Analysis

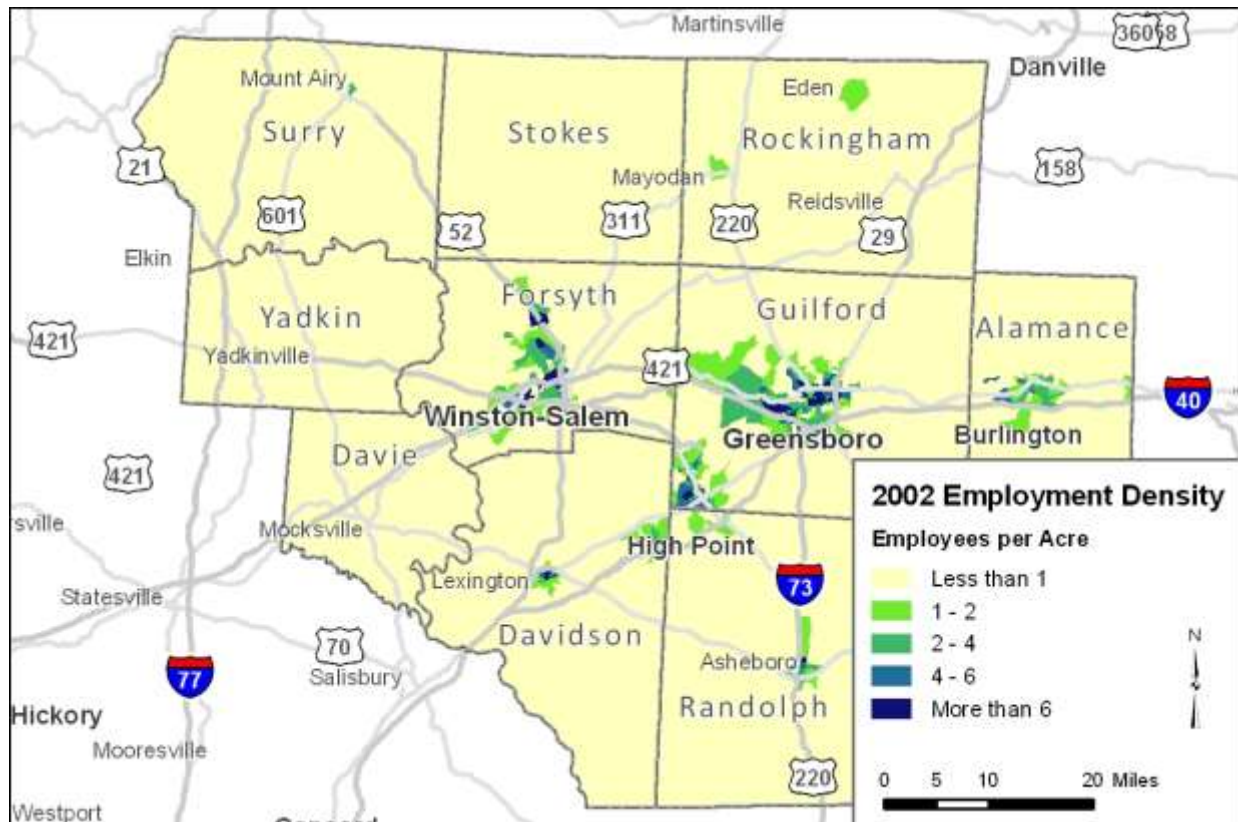
The analysis of existing and future employment conditions, particularly with regard to worksite locations and the origins of work trips, will be used in the assessment and design of possible transit services within the Piedmont Triad. The 2007 LEHD commute shed data is useful to identify potential regional express bus routes operating from outlying PART member counties to Forsyth and Guilford counties. The information facilitates the identification of possible park and ride sites and proposed transit centers.

2.0 REGIONAL EMPLOYMENT ASSESSMENT

As **Error! Reference source not found.** shows, there are several major employment hubs located within the PART region. The largest of these include Winston-Salem and Greensboro, followed by the Piedmont Triad International (PTI) Airport, High Point, and the Town of Kernersville. These locations are considered significant destinations for home-to-work travel. Other important regional employment destinations include Burlington, Asheboro, Lexington and Mount Airy.

Total employment in the ten-county region was 673,486 in 2002. The majority of this employment, roughly 446,000 or 66 percent, was located in Forsyth and Guilford counties. The figure below shows employment density in the region in 2002 by block group. The majority of the major employment hubs noted above have block groups with more than 16 employees per acre, which are generally concentrated in downtown areas. However, using block groups as the unit of measurement can mask the large concentrations of employment located outside of downtowns because block groups outside of downtown usually consist of an area much larger than block groups located in or near downtown areas.

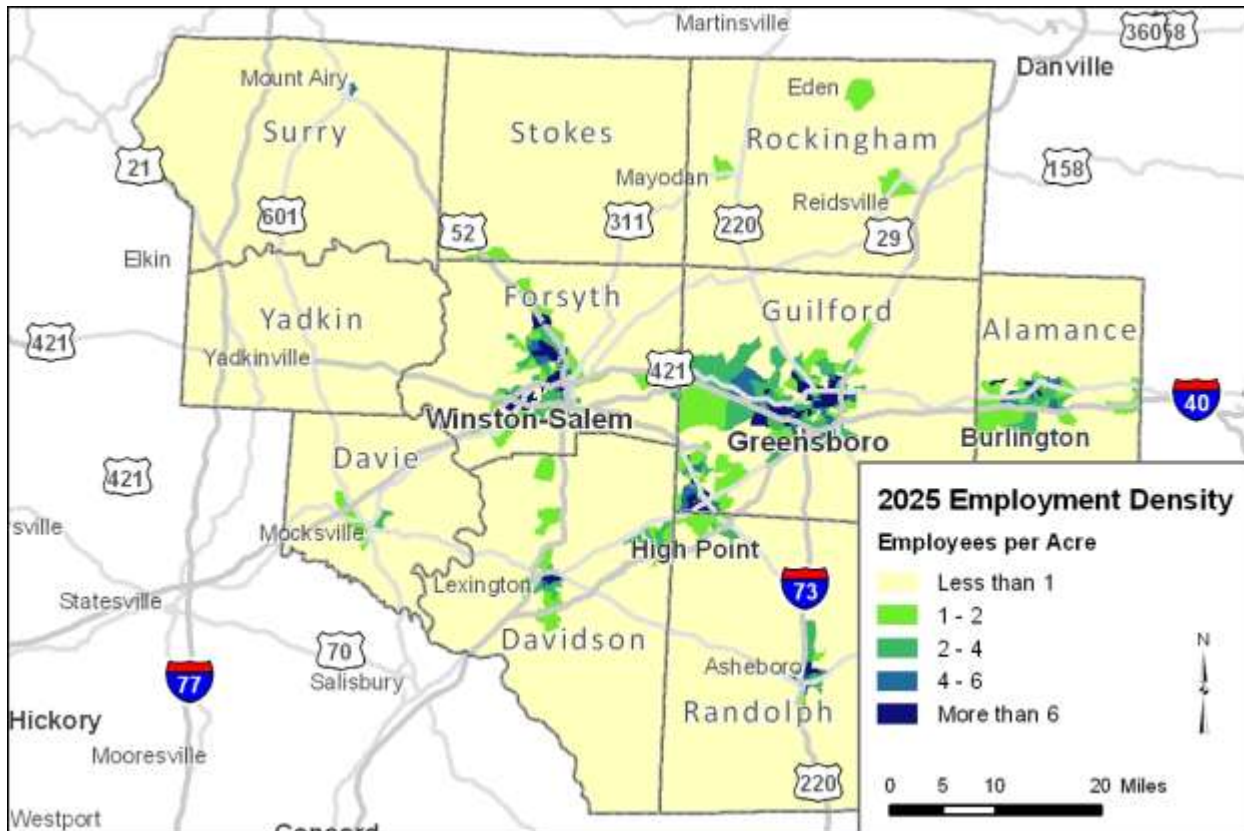
Figure 2-1 Employment Density, PART Region Block Groups, 2002



Source: Socio-Economic Data Forecasting for the Triad Region

Comparing **Error! Reference source not found.** with Figure 2-2 reveals that employment density is expected to increase in the region over the next 15 years. By 2025, total employment in the region is projected to increase by 60 percent to just over one million employees. Forsyth and Guilford counties continue to make up the majority of employment in the region under these projections (roughly 691,000) although these counties' share of total regional employment decreases slightly (from 66 percent in 2002 to 64 percent by 2025). This change indicates that employment outside of Forsyth and Guilford counties is projected to increase at a faster rate than employment inside of these counties, although these two counties still represent the region's main employment center.

Figure 2-2 Employment Density, PART Region Block Groups, 2025



Source: Socio-Economic Data Forecasting for the Triad Region

3.0 COUNTY EMPLOYMENT ASSESSMENTS

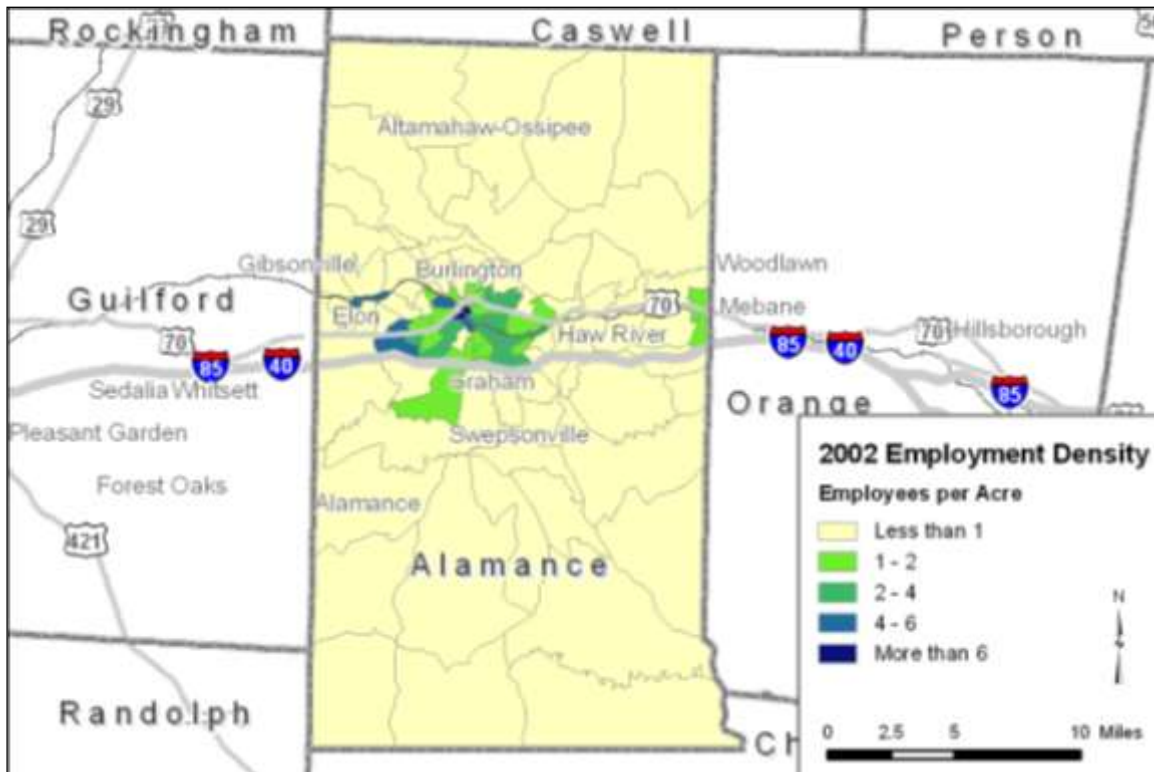
3.1 Alamance County

Of the roughly 673,000 employees in the ten-county region, 9 percent or about 60,000 employees are located within Alamance County.

Figure **3-1** shows employment density in the county in 2002. Employment is largely focused around the City of Burlington in the US-70 and I-85/I-40 corridors. The highest concentrations of employment are located in downtown Burlington, and in the Burlington Square Mall and Elon University areas. These areas have employment concentrations of at least four employees per acre. Outside of the areas in the vicinity of Burlington, the county has less than one employee per acre.

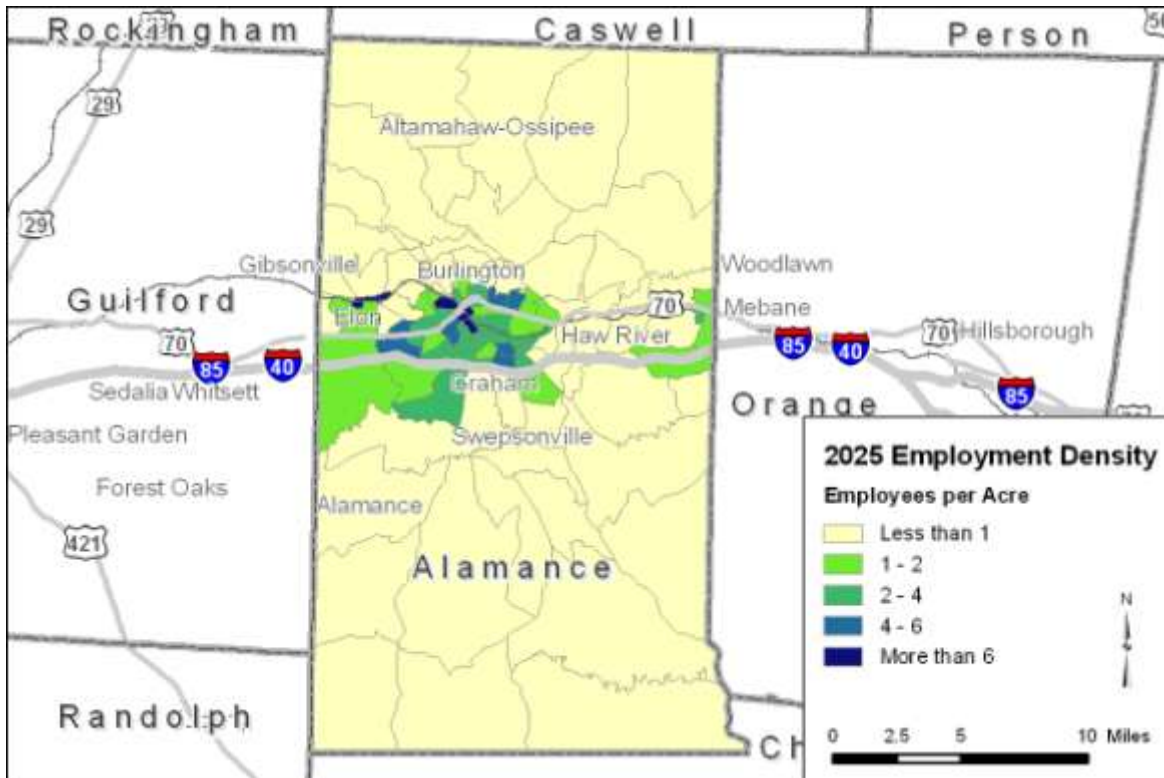
Figure 3-2 shows projected employment density in the county in 2025. The figure shows employment density increases relative to 2002 employment densities, with increases in many block groups within and near Burlington. Employment density also increases east and west of Burlington, expanding along the US-70 and I-85/I-40 corridors. Employment is expected to increase a substantial 50 percent from 2002 to 2025, although the county's share of total regional employment is expected to slip slightly from 9 percent to just over 8 percent.

Figure 3-1 Employment Density, Alamance County Block Groups, 2002



Source: Socio-Economic Data Forecasting for the Triad Region

Figure 3-2 Employment Density, Alamance County Block Groups, 2025



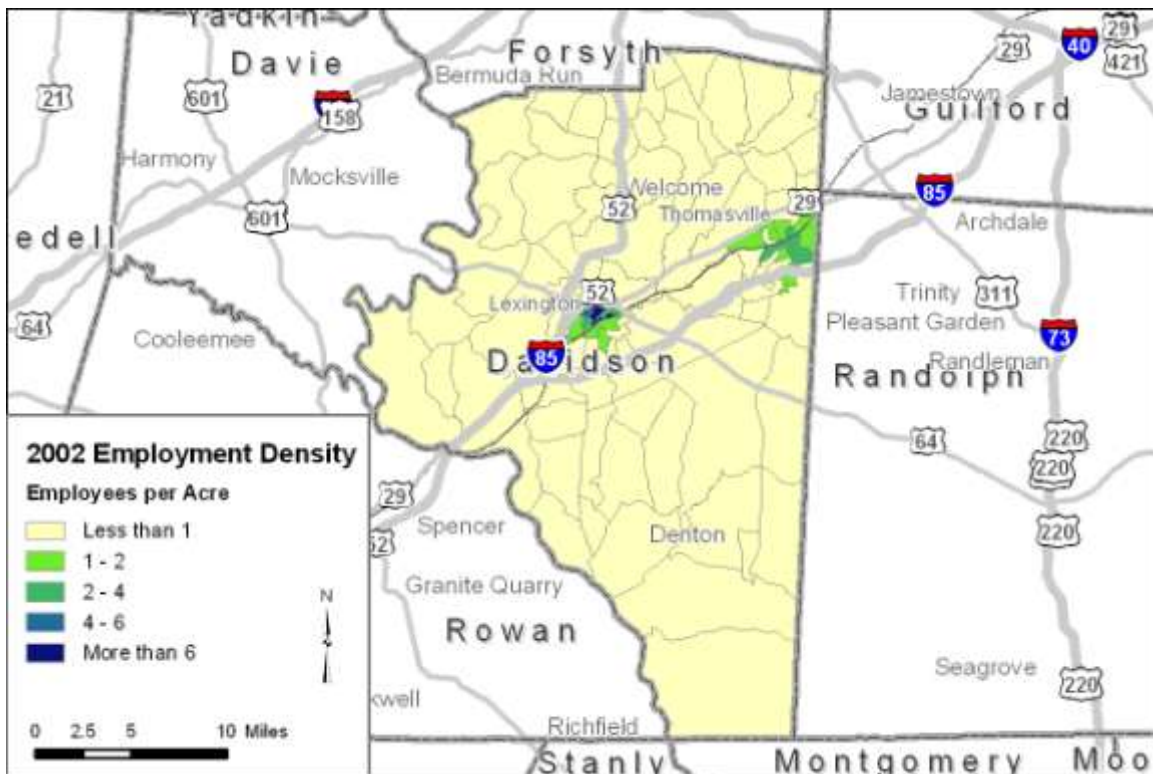
Source: Socio-Economic Data Forecasting for the Triad Region

3.2 Davidson County

About 53,000 employees are located in Davidson County, making up around 8 percent of total employment in the ten-county PART region. Figure 3-3 shows employment density in the county in 2002. Employment is largely focused around Lexington and Thomasville. Downtown Lexington has the highest concentrations of employment in the county, with three block groups with at least four employees per acre. Outside of the areas in the vicinity of Lexington and Thomasville, the county has less than one employee per acre.

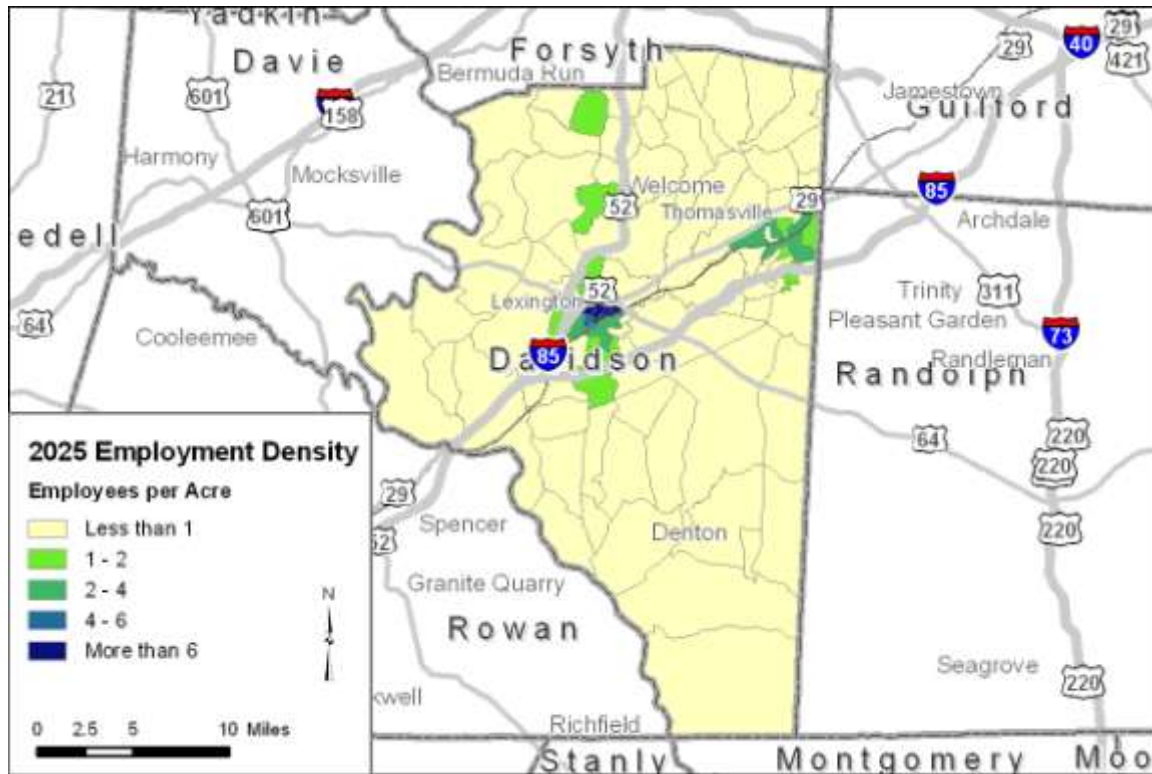
Figure 3-4 shows projected employment density in Davidson County in 2025. This figure shows higher employment densities than the 2002 levels shown in Figure 3-3. Employment densities increase within and near Lexington and Thomasville. Lexington's downtown is projected to have a total of five block groups with four or more employees per acre. Employment density also increases outside of Lexington proper within the vicinity of I-85 to the south and along US-52 north and west of Lexington. Employment density also increases in the vicinity of Thomasville; near Welcome roughly four miles north of Lexington; and west of US-52 near the northern county border. A 79 percent increase in employment is projected from 2002 to 2025 for the county, which would bring the county's share of total regional employment from 8 percent to 9 percent.

Figure 3-3 Employment Density, Davidson County Block Groups, 2002



Source: Socio-Economic Data Forecasting for the Triad Region

Figure 3-4 Employment Density, Davidson County Block Groups, 2025



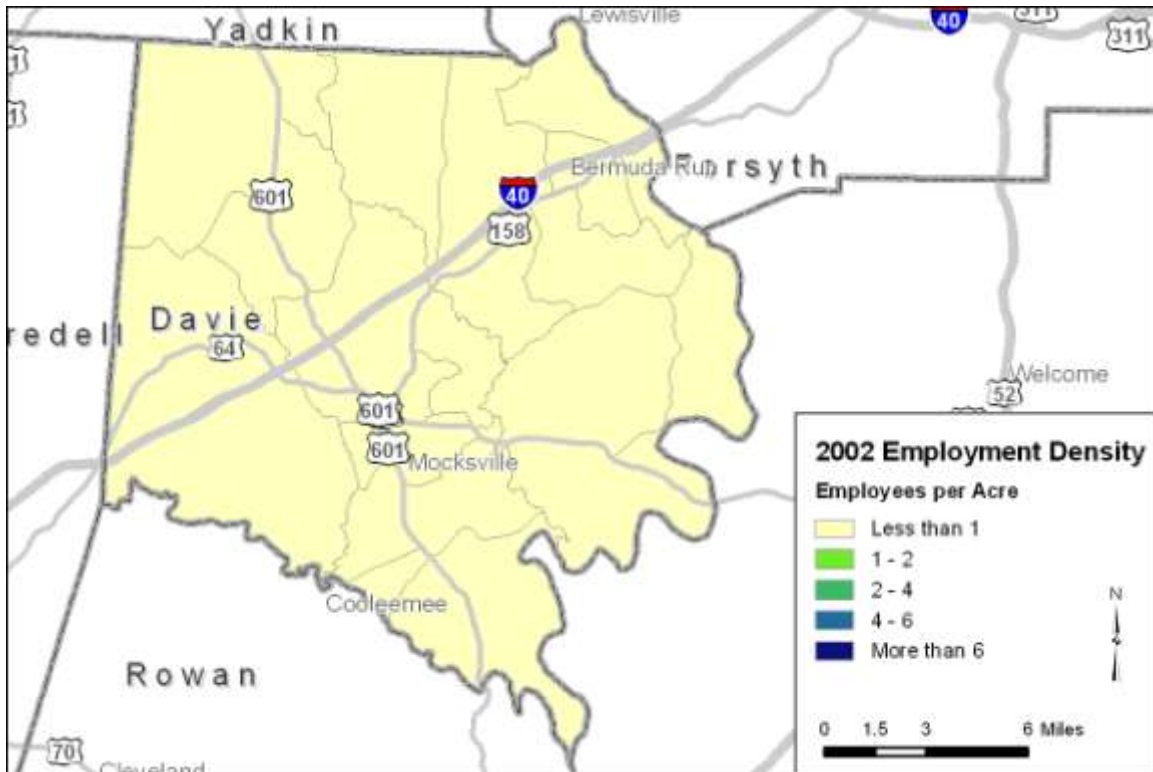
Source: Socio-Economic Data Forecasting for the Triad Region

3.3 Davie County

Just over 10,000 employees are located in Davie County, representing 1.5 percent of the region's total employment. Figure 3-5 shows employment density in the county in 2002. Employment density is less than one employee per acre for the entire county. However, this is likely attributable to the fact that the entire county is made up of relatively large block groups, which could mask the higher employment densities that could be found using smaller units of geography (such as blocks) in parts of the county such as Mocksville.

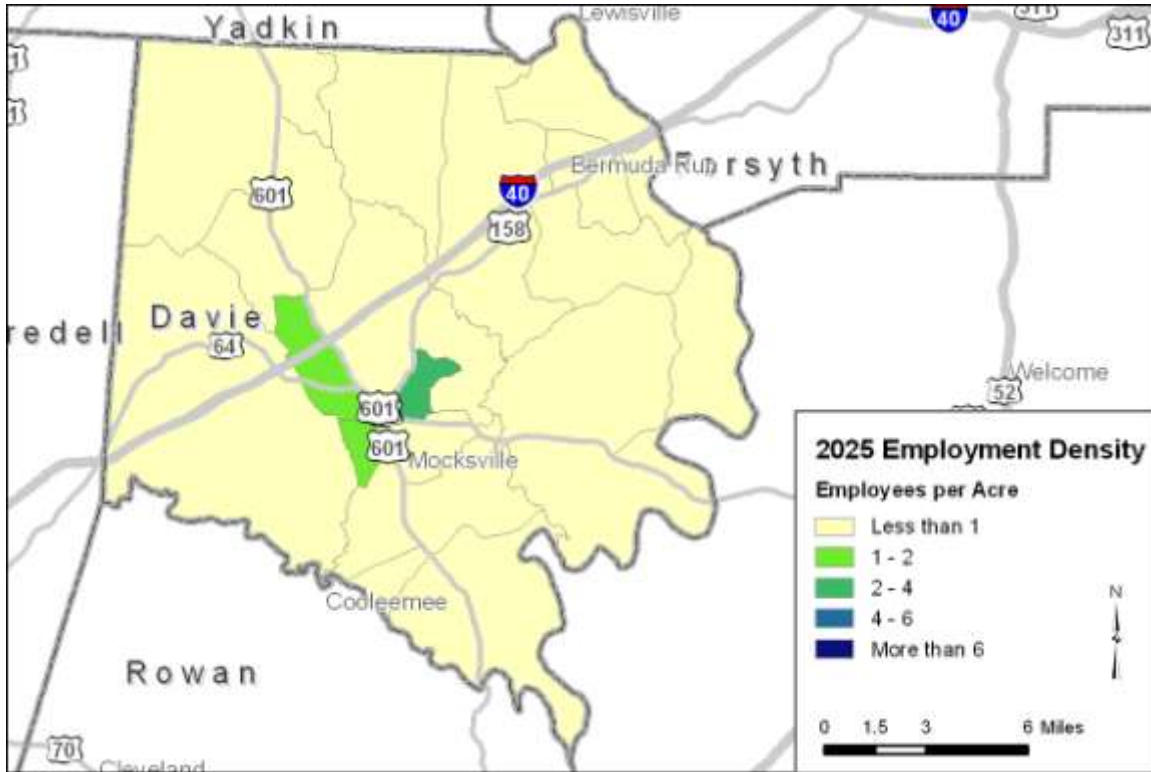
Figure 3-6 shows projected employment density in the county in 2025. The figure shows higher employment densities relative to 2002 employment densities in the vicinity of Mocksville. Employment density increases west and northwest of Mocksville along US-601, and to the northeast along US-158. The area northeast of Mocksville is projected to have the largest density increases from less than one employee per acre in 2002 to two-to-four employees per acre in 2025. A 124 percent increase in employment is projected for the county from 2002 to 2025. Davie County's share of total regional employment is forecasted to be 2 percent, up slightly from 1.5 percent in 2002.

Figure 3-5 Employment Density, Davie County Block Groups, 2002



Source: Socio-Economic Data Forecasting for the Triad Region

Figure 3-6 Employment Density, Davie County Block Groups, 2025



Source: Socio-Economic Data Forecasting for the Triad Region

3.4 Randolph County

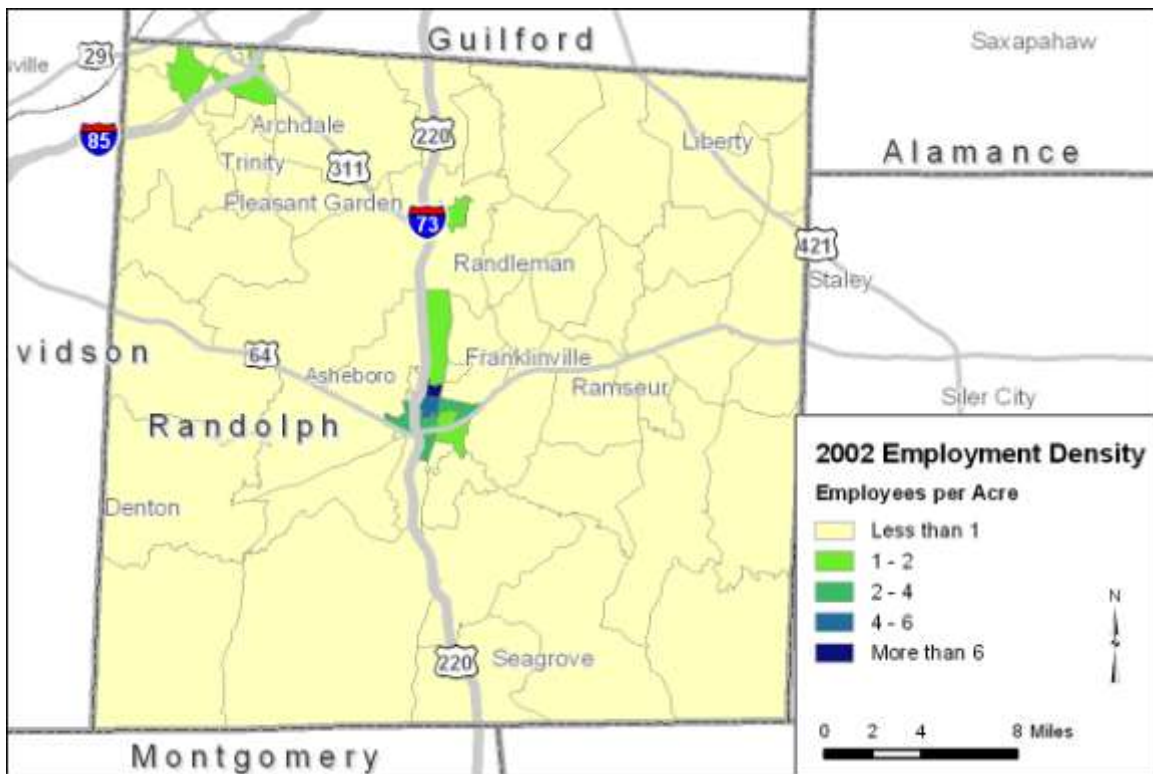
At just over 50,000 employees, Randolph County has roughly 8 percent of the region's total employment.

Figure **3-7** shows employment density in the county in 2002. Employment is largely located in the vicinity of Archdale and Asheboro, with some employment north of Asheboro along US-220. Downtown Asheboro has the highest concentrations of employment in the county, having two block groups with at least four employees per acre. Outside of the areas in the vicinity of Archdale and Asheboro, the county generally has less than one employee per acre.

Figure 3-8 shows projected employment density in Randolph County in 2025. Comparing this figure to

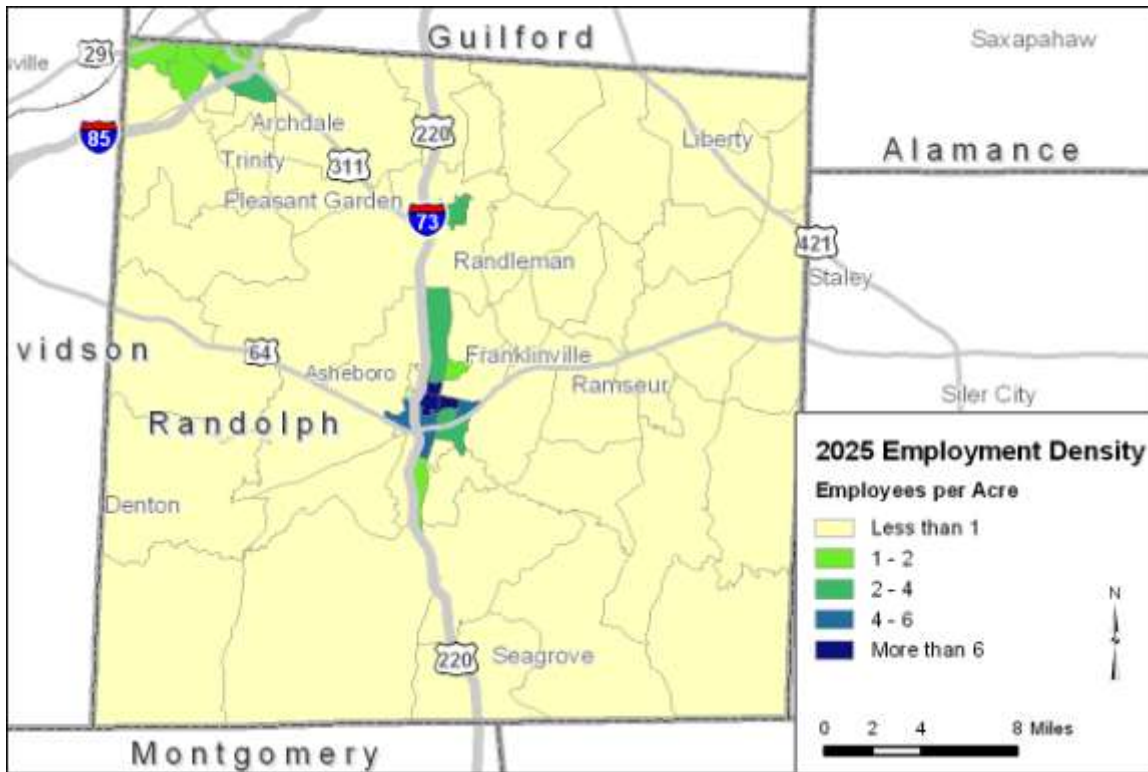
Figure 3-7 reveals higher employment densities relative to 2002. Most of the employment density increases are within or near Archdale and Asheboro. Employment density increases for five block groups in the vicinity of Archdale, and a total of six block groups in the vicinity of Asheboro have four or more employees per acre by 2025. Employment density also increases north of Asheboro along US-220, including a small area east of the intersection of US-220 and US-311. From 2002 to 2025, employment in the county is projected to increase by 79 percent to just over 85,000 employees, resulting in the county's share of total regional employment remaining at 8 percent.

Figure 3-7 Employment Density, Randolph County Block Groups, 2002



Source: Socio-Economic Data Forecasting for the Triad Region

Figure 3-8 Employment Density, Randolph County Block Groups, 2025



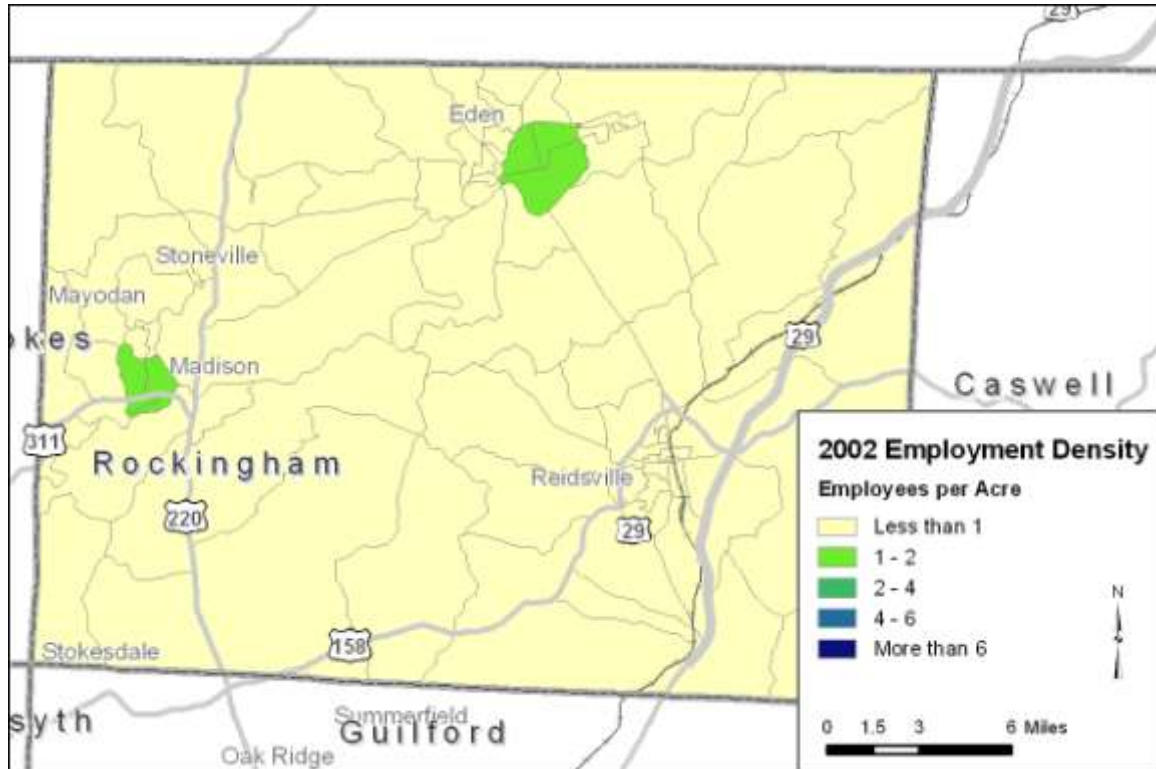
Source: Socio-Economic Data Forecasting for the Triad Region

3.5 Rockingham County

Approximately 35,000 employees are located in Rockingham County, representing about 5 percent of total employment for the region. Figure 3-9 shows employment density in the county in 2002. Employment is largely focused around Eden and Madison. Each of these areas has employment densities in the range of one-to-two employees per acre. Outside of these areas, the county has less than one employee per acre.

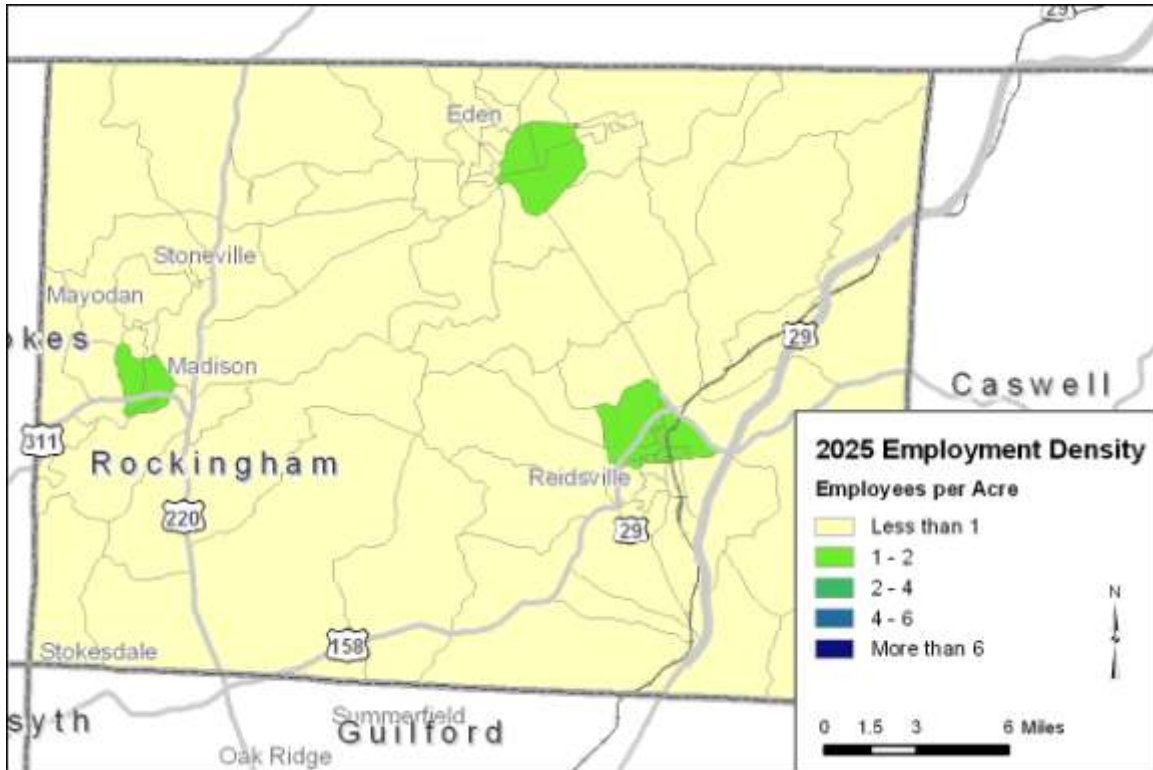
Figure 3-10 shows projected employment density in 2025. This figure shows higher employment densities than those shown for 2002 in Figure 3-9 for nine block groups in the northern portion of Reidsville generally between US-158 and NC-65. As forecasted, these Reidsville block groups will have one-to-two employees per acre as found in Eden and Madison, which remain unchanged in terms of 2025 employment density. A 46 percent increase in employment is projected for the county from 2002 to 2025, which would result in Rockingham County's share of total regional employment remaining at 5 percent.

Figure 3-9 Employment Density, Rockingham County Block Groups, 2002



Source: Socio-Economic Data Forecasting for the Triad Region

Figure 3-10 Employment Density, Rockingham County Block Groups, 2025



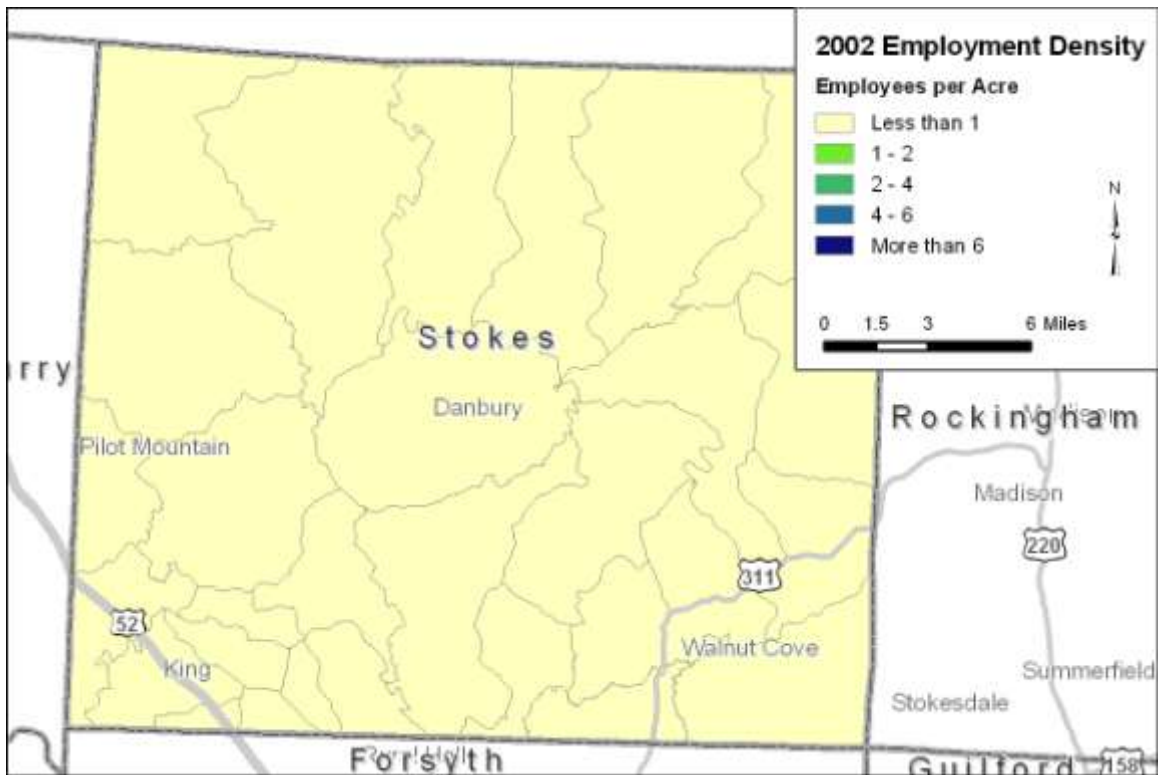
Source: Socio-Economic Data Forecasting for the Triad Region

3.6 Stokes County

Approximately 4,700 employees are located in Stokes County, making up less than one percent of total employment for the ten-county Piedmont Triad region. Figure 3-11 illustrates employment density in the county in 2002. All block groups within the county, including those in the vicinity of King and Walnut Cove, have employment densities of less than one employee per acre, reflecting the predominantly rural character of the county.

Figure 3-12 shows projected employment density in Stokes County in 2025. This figure shows higher employment densities than the 2002 levels shown in Figure 3-11 for two block groups in the vicinity of King and US-52 in the southwest portion of the county. These two block groups increase to one-to-two persons per acre. The remainder of the county's employment density is expected to remain unchanged at less than one employee per acre. Employment is projected to increase to 19,000 employees by 2025, representing a 300 percent increase in employment between 2002 and 2025. As projected, the county's share of total regional employment would more than double, from less than 1 percent in 2002 to 1.8 percent in 2025.

Figure 3-11 Employment Density, Stokes County Block Groups, 2002



Source: Socio-Economic Data Forecasting for the Triad Region

Figure 3-12 Employment Density, Stokes County Block Groups, 2025



Source: Socio-Economic Data Forecasting for the Triad Region

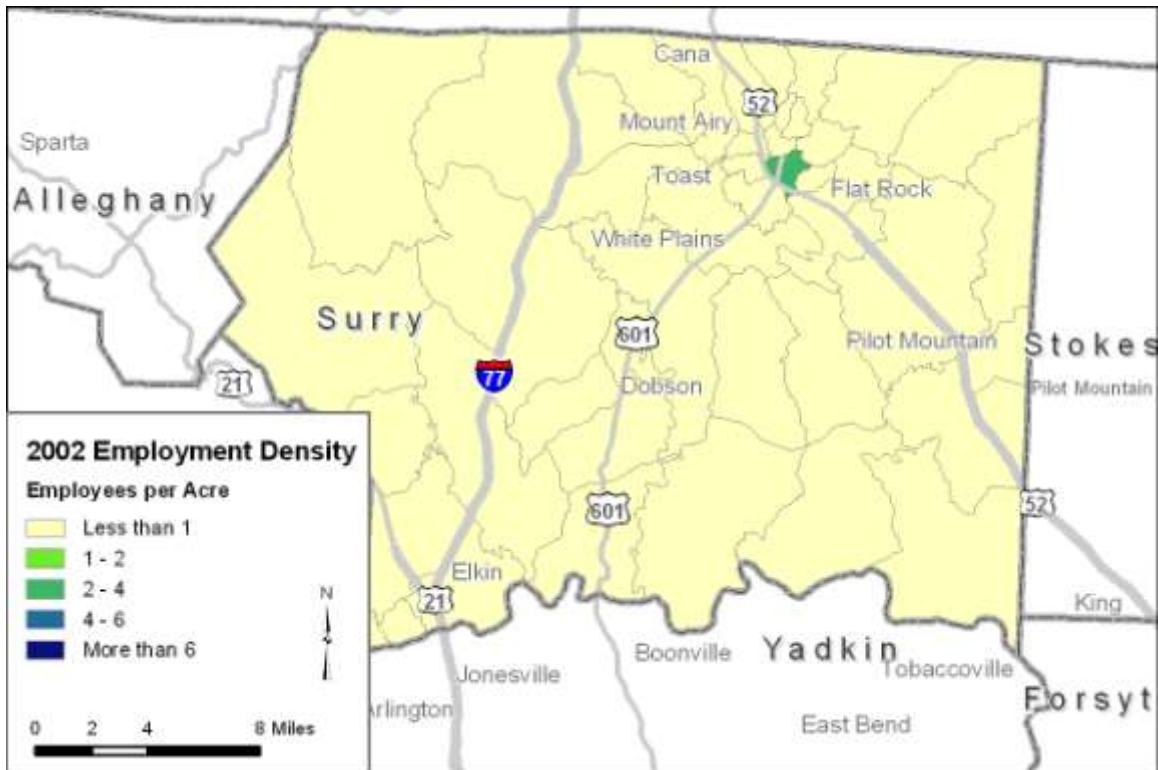
3.7 Surry County

Roughly 12,600 employees are located in Surry County, making up 2 percent of the region's total employment.

Figure **3-13** shows employment density in the county in 2002. Mount Airy is the only location in which employment density is greater than one person per acre. Two block groups near the intersection of US-601 and US-52 in Mount Airy have employment densities of two-to-four employees per acre. The remainder of the county has an employment density of less than one employee per acre.

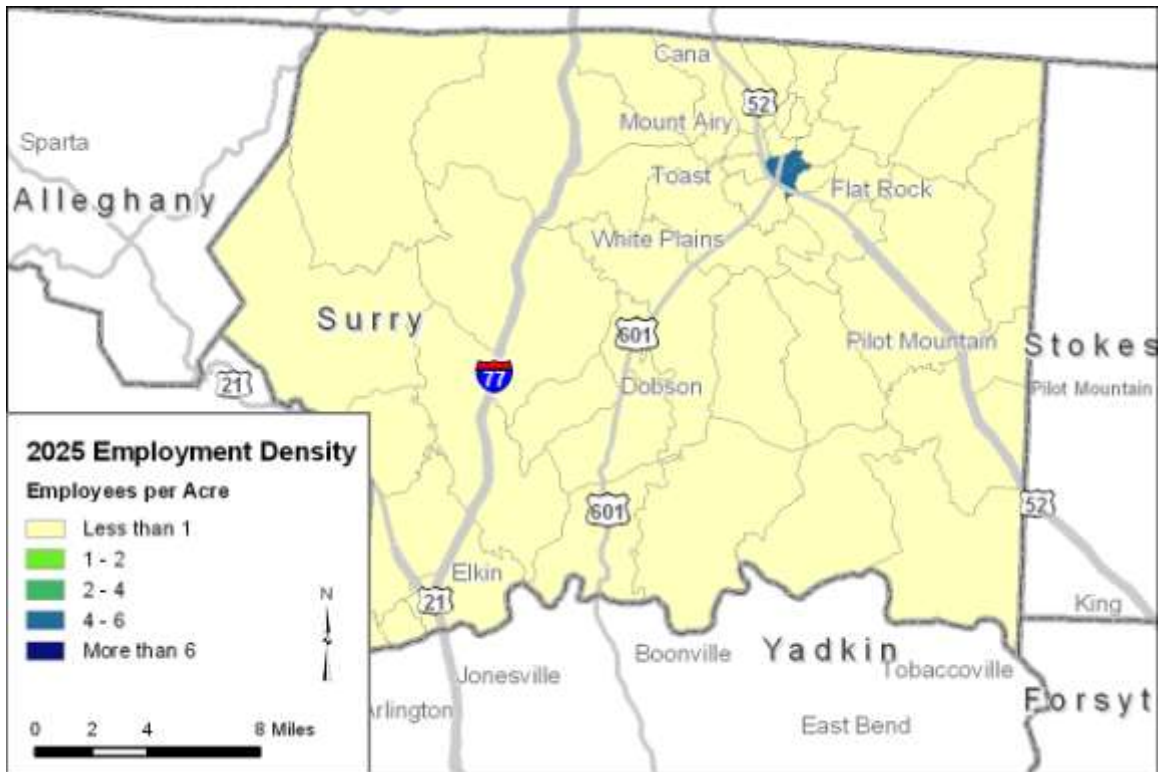
Figure 3-14 shows projected employment density in the county in 2025. The figure shows higher employment densities relative to 2002 levels for the two previously noted block groups in Mount Airy, which increase to four-to-six employees per acre. Employment densities in the remainder of the county remain unchanged at less than one employee per acre. A 100 percent increase in employment is projected for the county from 2002 to 2025, bringing total county employment to just over 25,000 employees. The county's share of total regional employment would increase from 2 percent in 2002 to 2.3 percent in 2025.

Figure 3-13 Employment Density, Surry County Block Groups, 2002



Source: Socio-Economic Data Forecasting for the Triad Region

Figure 3-14 Employment Density, Surry County Block Groups, 2025



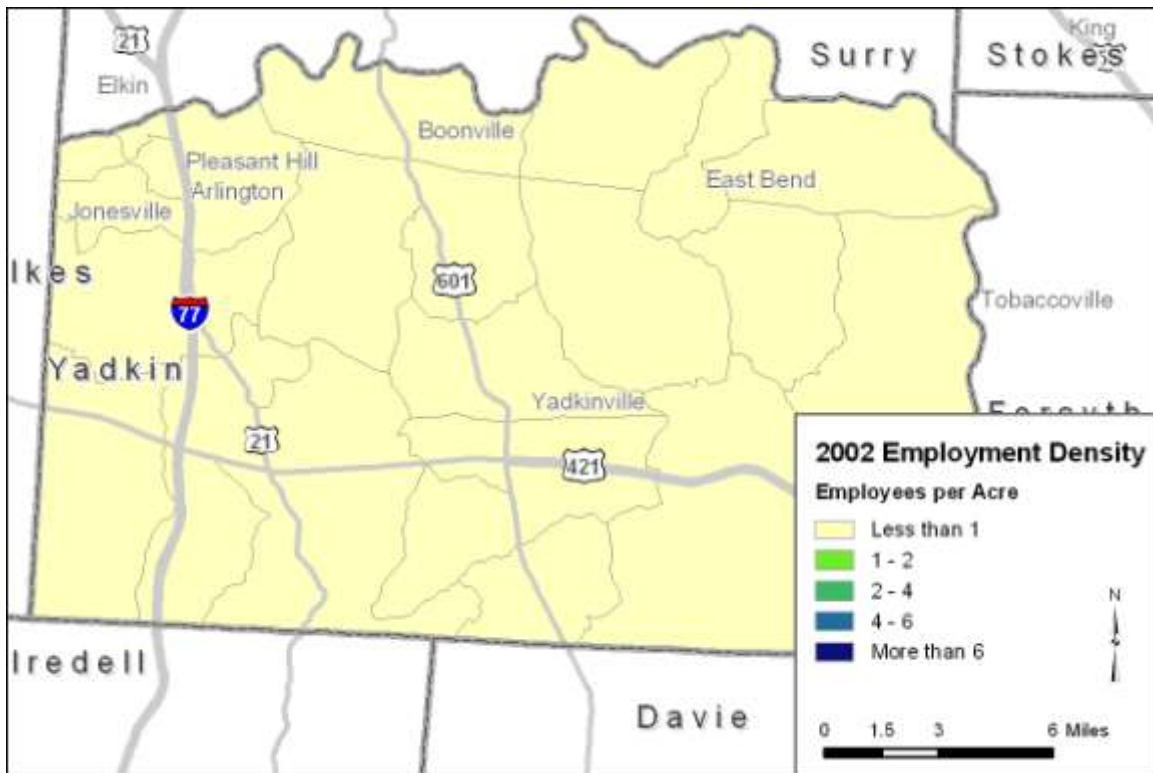
Source: Socio-Economic Data Forecasting for the Triad Region

3.8 Yadkin County

At 2,600 employees, Yadkin County has the fewest employees in the ten-county region, making up less than half of one percent of total regional employment. Figure 3-15 shows employment density in the county in 2002. All block groups within the county, including those in the vicinity of Jonesville and Yadkinville, have employment densities of less than one employee per acre, reflecting the predominantly rural character of the county.

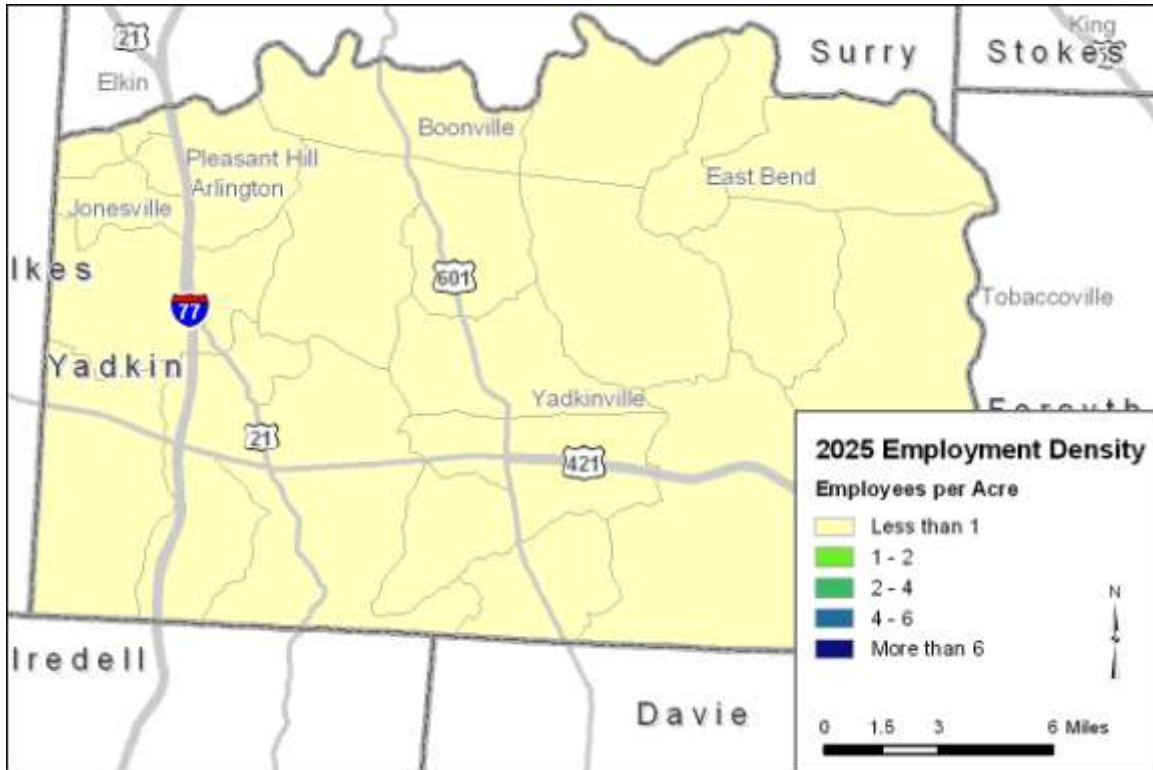
Figure 3-16 shows projected employment density in Yadkin County in 2025. This figure shows no major changes when compared to the 2002 employment densities shown in Figure 3-15. All of the county's block groups remain at less than one employee per acre. Although having no projected changes in employment density, the county's total employment is projected to double from around 2,600 employees in 2002 to around 5,200 in 2025. As projected, the county's share of total regional employment will remain virtually unchanged.

Figure 3-15 Employment Density, Yadkin County Block Groups, 2002



Source: Socio-Economic Data Forecasting for the Triad Region

Figure 3-16 Employment Density, Yadkin County Block Groups, 2025



Source: Socio-Economic Data Forecasting for the Triad Region

4.0 COMMUTING PATTERNS ANALYSIS

4.1 City of Greensboro Area

Most commute trips to the major employment centers in the City of Greensboro area are from within Guilford County (58 percent). Another 18 percent come from across several adjacent counties ().

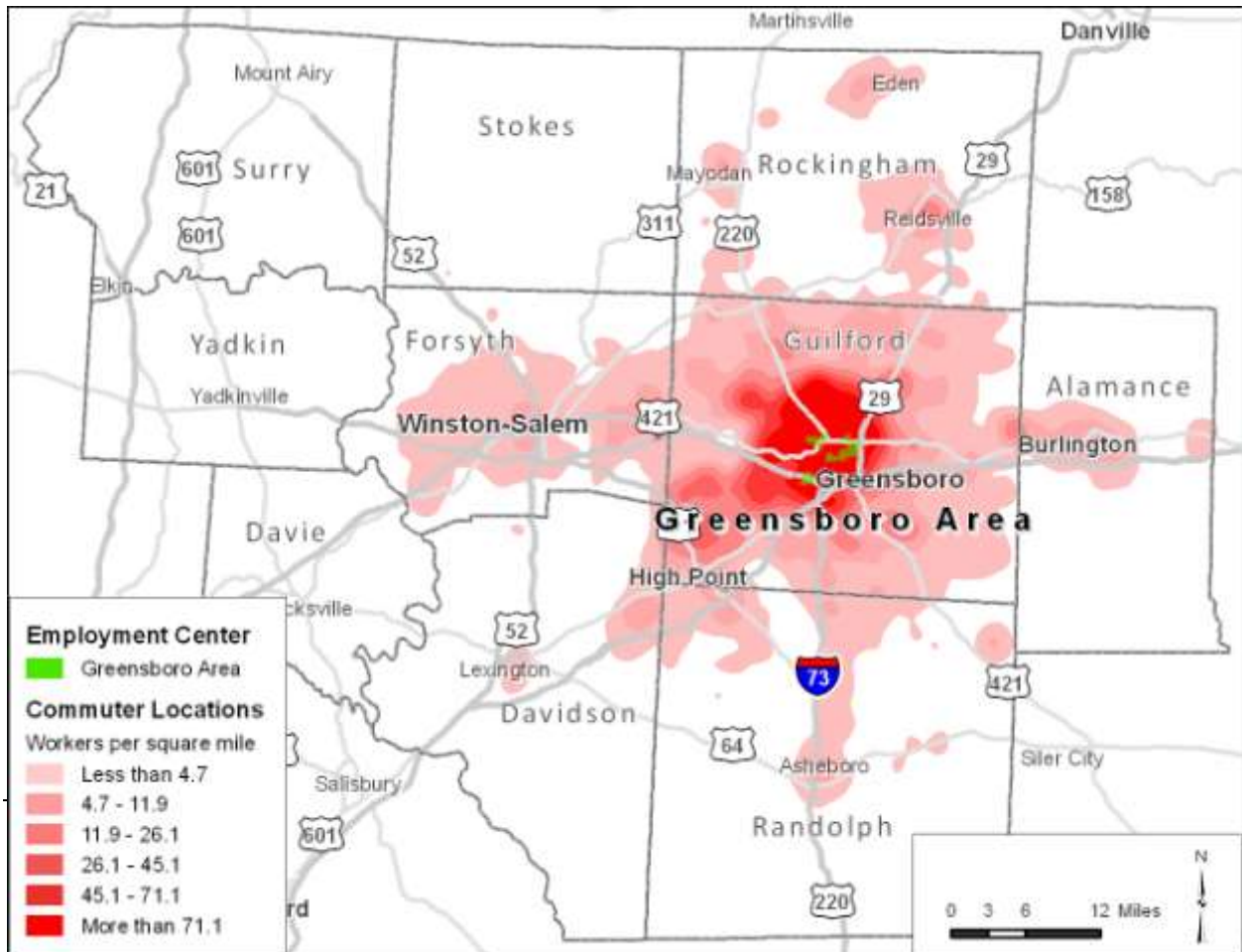
The Table 4-1 Greensboro Commute Travel commute shed for the Greensboro area (Figure 4-1) is County. US-421 to

Table 4-1 Greensboro Commute Travel

Origin	Count	Share
Guilford County	22,703	57.7%
Forsyth County	1,945	4.9%
Randolph County	1,786	4.5%
Rockingham County	1,742	4.4%
Alamance County	956	2.4%
Davidson County	799	2.0%
All Other Locations	9,431	24.0%
<i>Total</i>	<i>39,362</i>	

densest in the immediate vicinity of the employment centers in central Guilford County. There are also commute shed corridors along the west, US-220 north and south, US-29 north and south, and I-85/I-40 to the east. There are notable pockets of commute trips originating from the City of Winston-Salem as well as the towns of Mayodan, Eden, and Lexington.

Figure 4-1 Commute Shed to Greensboro Area



Source: U.S. Census Bureau, Data Integration Division

4.2 City of High Point CBD

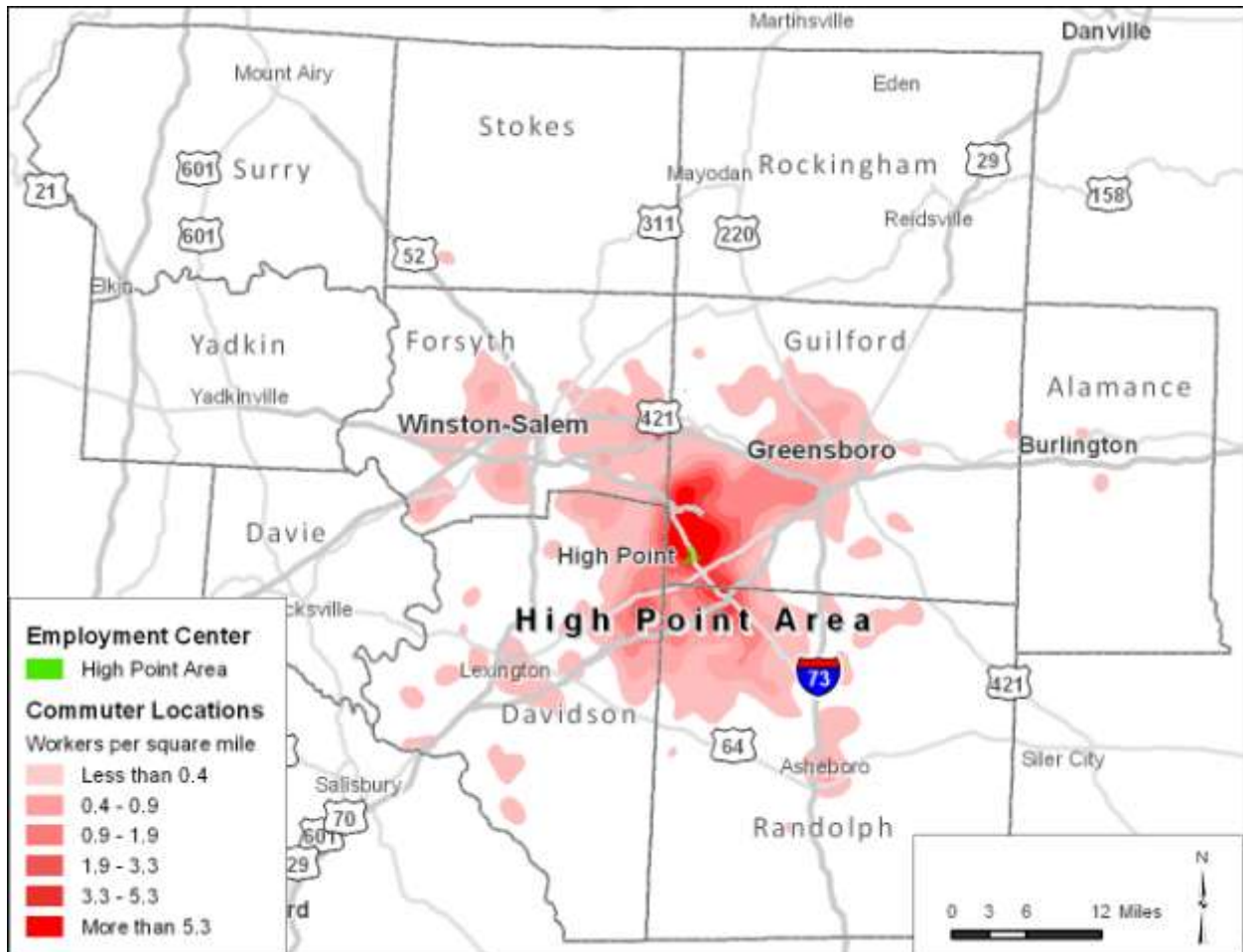
The High Point CBD attracts 2,600 commute trips primarily from the four surrounding counties of Guilford, Randolph, Davidson, and Forsyth (**Error! Reference source not found.**). The majority of these commute trips (1,300) originate from Guilford County. Analyzing the commute shed to downtown High Point (

Figure 4-2) reveals that the densest concentration of workers is located along the US-311 corridor and along I-85 to the south. There are also notable pockets of commute trips originating from the cities of Winston-Salem and Greensboro as well as the towns of Asheboro and Lexington.

Table 4-2 High Point Commute Travel

Origin	Count	Share
Guilford County	1,283	48.6%
Randolph County	474	17.9%
Davidson County	382	14.5%
Forsyth County	226	8.6%
Rockingham County	21	0.8%
Alamance County	16	0.6%
Stokes County	15	0.6%
Davie County	11	0.4%
All Other Locations	214	8.1%
<i>Total</i>	<i>2,642</i>	

Figure 4-2 Commute Shed to High Point CBD



Source: U.S. Census Bureau, Data Integration Division

4.3 City of Winston-Salem Area

Winston-Salem draws most of its commute trips from within the county (54 percent within Forsyth). Another 24 percent of the remaining trips are spread across several adjacent counties (

) . The commute shed to the Winston-Salem area (

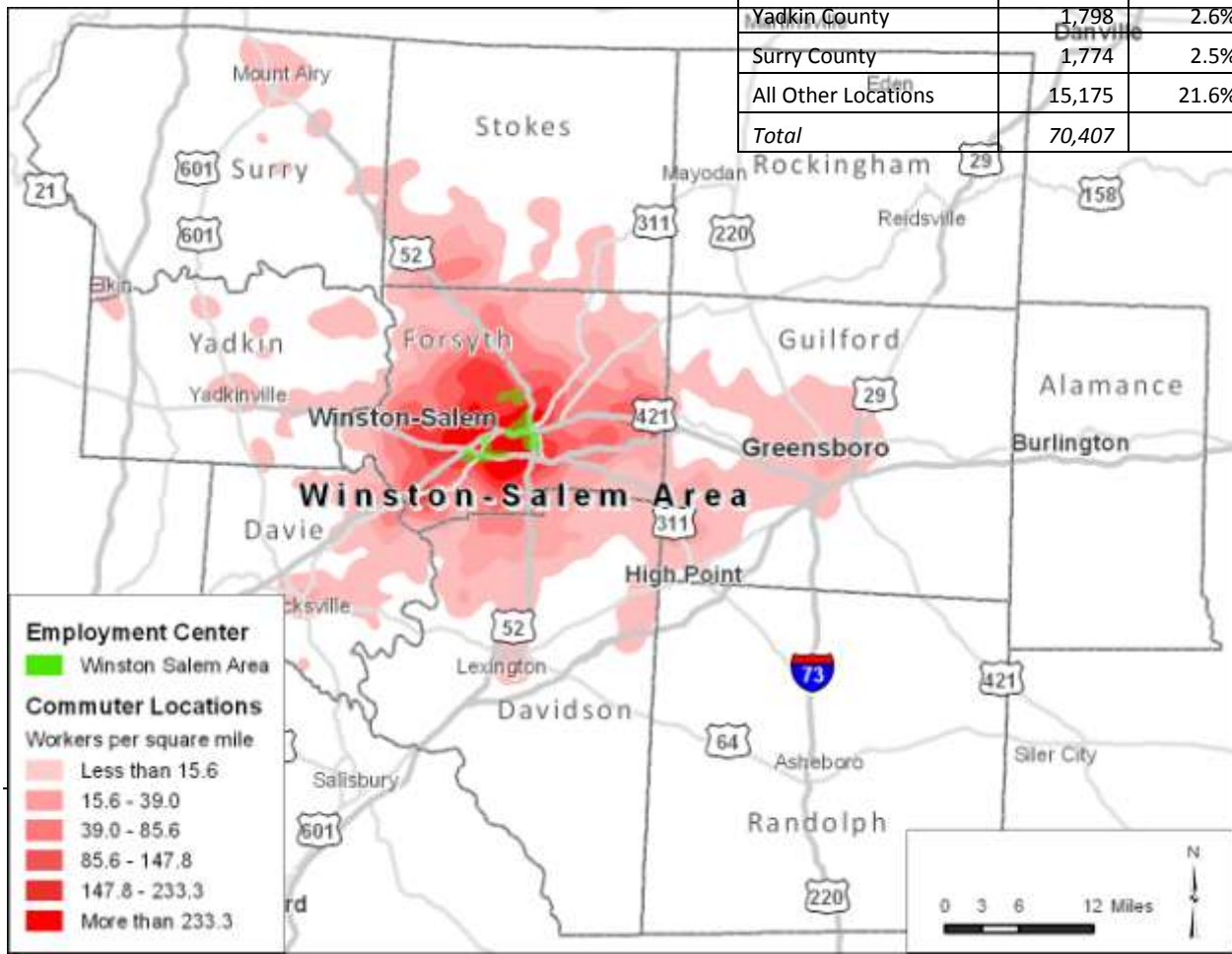
) is densest in the area in the immediate vicinity of the employment centers. There are also commute shed corridors along US-421 and I-40 to the west, US-52 north and south, and US-311 north and south. In addition, there are notable pockets of commute trips originating from Greensboro as well as Mount Airy, Elkin, and Yadkinville.

Table 4-3 Winston-Salem Commute Travel

Origin	Count	Share
Forsyth County	38,253	54.3%
Guilford County	4,143	5.9%
Davidson County	3,988	5.7%
Stokes County	2,952	4.2%
Davie County	2,324	3.3%
Yadkin County	1,798	2.6%
Surry County	1,774	2.5%
All Other Locations	15,473	21.6%
Total	70,407	

Figure 4-3 Commute Shed to Winston-Salem Area

Source: U.S. Census Bureau, Data Integration Division



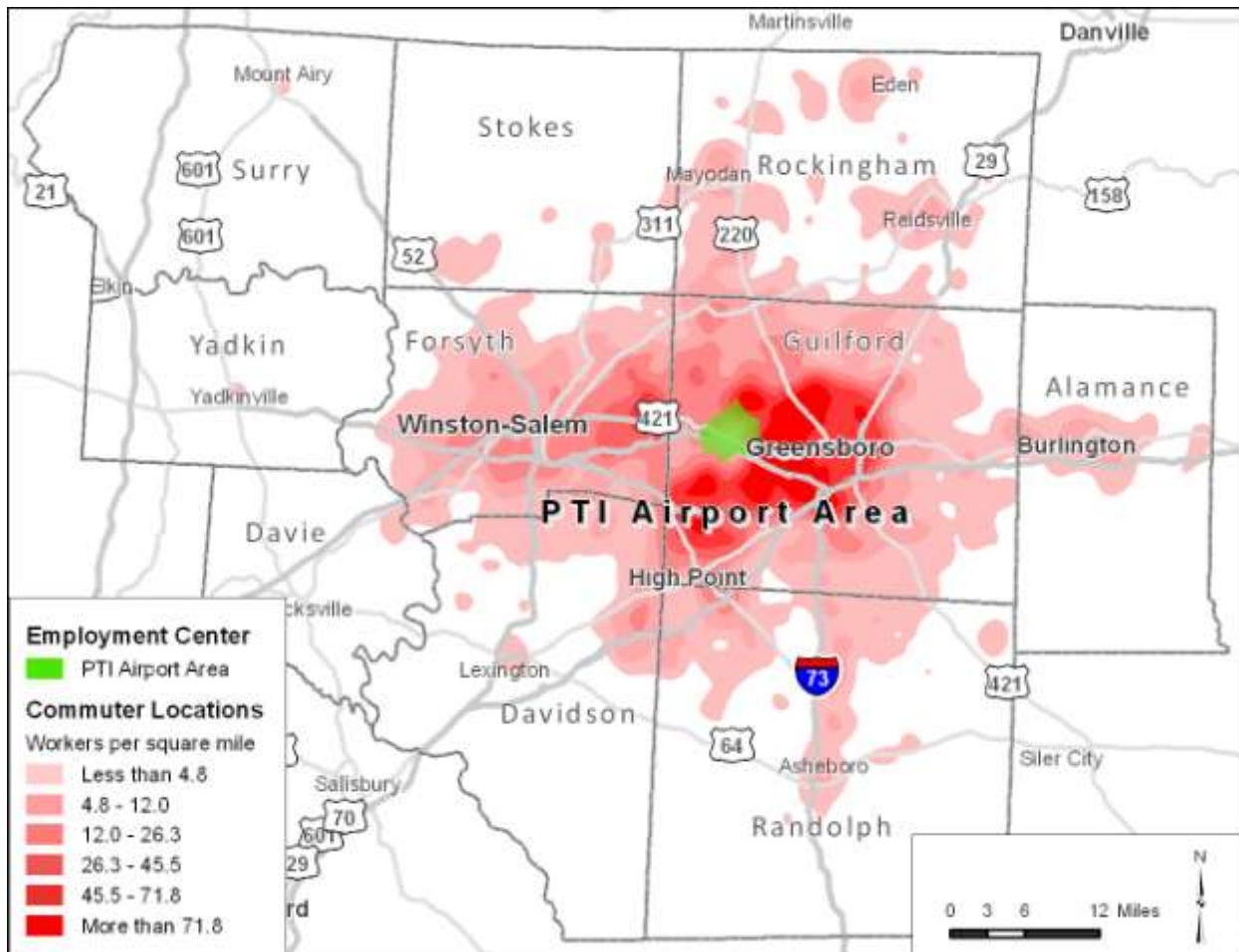
4.4 PTI Airport Area

The Piedmont-Triad International (PTI) Airport and adjacent support industries attract 25,500 commute trips from across the region (Table 4-4). Nearly half the workers live in Guilford County (12,600) and another 3,400 live in Forsyth County. Over 1,000 workers commute from Randolph County to the south and from Rockingham County to the north. The densest portion of the commute shed for the PTI Airport area (Figure 4-4) is within Guilford County where nearly half the work trips originate. The commute shed also spreads throughout most of Forsyth County and the northern border of Davidson County. More distinct corridors are visible along US-220 in Rockingham County, I-40/I-85 in Alamance County, and US-220 in Randolph County. There are also notable pockets of commute trips originating from Eden, Reidsville, and Lexington.

Table 4-4 PTI Airport Commute Travel

Origin	Count	Share
Guilford County	12,586	49.3%
Forsyth County	3,403	13.3%
Randolph County	1,138	4.5%
Rockingham County	1,123	4.4%
Davidson County	858	3.4%
Alamance County	475	1.9%
Stokes County	339	1.3%
All Other Locations	5,584	21.9%
<i>Total</i>	<i>25,506</i>	

Figure 4-4: Commute Shed to PTI Airport Area



Source: U.S. Census Bureau, Data Integration Division

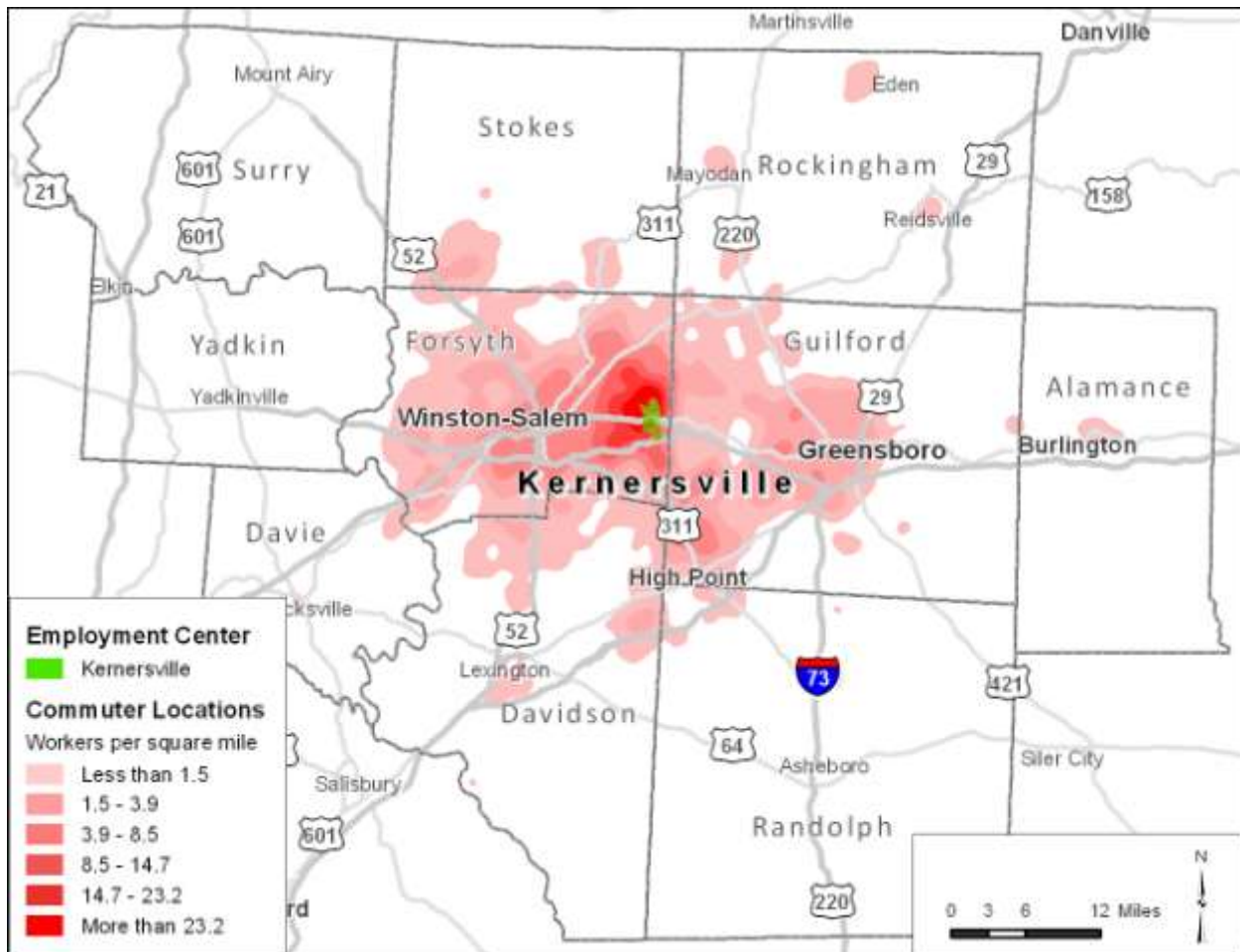
4.5 Town of Kernersville

Kernersville draws most of its commute trips from within Forsyth County (43 percent). Another large share (19 percent) comes from Guilford County to the east. Smaller shares of commuter trips originate from several other adjacent counties (**Error! Reference source not found.**). The densest concentration of workers for the Kernersville commute shed (**Error! Reference source not found.**) is the area surrounding the employment centers near the eastern county border. There are also commute shed corridors along US-52 north and south, and US-311 mainly to the south. There are a few pockets of commute trips originating from Eden, Mayodan and Reidsville in Rockingham County, Asheboro and Lexington in Davidson County, Asheboro and Lexington in Randolph County, Asheboro and Lexington in Guilford County, Asheboro and Lexington in Yadkin County, Asheboro and Lexington in Surry County, Asheboro and Lexington in Stokes County, Asheboro and Lexington in Forsyth County, Asheboro and Lexington in Guilford County, Asheboro and Lexington in Davidson County, Asheboro and Lexington in Stokes County, Asheboro and Lexington in Rockingham County, Asheboro and Lexington in Randolph County, Asheboro and Lexington in Davie County, Asheboro and Lexington in Yadkin County, Asheboro and Lexington in All Other Locations.

Table 4-5 Kernersville Commute Travel

Origin	Count	Share
Forsyth County	3,188	43.3%
Guilford County	1,411	19.2%
Davidson County	397	5.4%
Stokes County	270	3.7%
Rockingham County	208	2.8%
Randolph County	152	2.1%
Davie County	89	1.2%
Yadkin County	76	1.0%
All Other Locations	1,571	21.3%
<i>Total</i>	<i>7,362</i>	

Figure 4-5: Commute Shed to Kernersville Area



Source: U.S. Census Bureau, Data Integration Division

5.0 CONCLUSIONS

The location of high density employment areas presented in Section 3.0 will be used in confirming the location of existing PART regional express routes and in the design of new regional express and local transit services. The forecasted employment concentrations in 2025 also will be helpful in identifying mobility options in Alamance, Davidson, Davie, Randolph, Rockingham, Stokes, Surry and Yadkin counties, particularly along strategic corridors in these jurisdictions.

The 2007 Census commute shed information discussed in Section 5.0 identifies target corridors for work trip origins destined to major employment centers in Forsyth and Guilford counties. This data will be used to define the strategic commuting corridors in the eight member counties of PART and to indicate both origins and destinations within these target corridors.