North Carolina Public Transportation
Strategic Plan

County Commissions
City Councils
Transit Boards
Metropolitan Planning Organizations
Rural Planning Organizations

August and September 2017
North Carolina’s Transit Partnerships

- Partnerships make it possible for 74 million transit customers annually to have service in all 100 counties.
Public Transportation Systems in North Carolina by Category

Transit System Type (count)
- Urban Single-City (15)
- Regional Urban (2)
- Fixed Route in Small Cities (2)
- Consolidated Small City-Community (1)
- Consolidated Urban-Community (5)
- Human Service (2)
- Regional Community (6)
- Community (87)

January 4, 2016
North Carolina’s Transit Investment
Statewide Mobility and Access to Opportunity
FY 2016 North Carolina Transit Operations Revenue by Source

Source: Institute for Transportation Research and Education
Urban and Community Operating and Financial Statistics
Exceptional Growth in Urban Public Transportation Ridership

- 20,000,000
- 30,000,000
- 40,000,000
- 50,000,000
- 60,000,000
- 70,000,000
- 80,000,000

Public Transportation Ridership


- Blue Line opens
- Transit 2001
North Carolina
Non-Urbanized and Urbanized Population 1950 to 2010

- U.S. Census defines urbanized areas greater than 50,000 population
- In 2010, 55% of the state’s 9.5 million persons lived in urbanized areas
- From 1950 to 2010, NC’s urbanized area population grew from 13% to 55% of the state’s population
By 2040, NC is projected to add:

- 2.4 million jobs – 41% more than 2016
- 3.5 million more residents – 35% more than 2016

Source: 2017 - Woods & Poole Economics, Inc.
Population Change by Age Group 2016 to 2036

- By 2036, North Carolina’s population of persons older than age 65 will grow by a million persons, or 64.5 percent.

<table>
<thead>
<tr>
<th>Age Group</th>
<th>2016</th>
<th>2026</th>
<th>2036</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; 18</td>
<td>2.3</td>
<td>2.4</td>
<td>2.6</td>
<td>+10.5%</td>
</tr>
<tr>
<td>18 - 24</td>
<td>1.0</td>
<td>1.1</td>
<td>1.1</td>
<td>+8.2%</td>
</tr>
<tr>
<td>24 - 64</td>
<td>5.3</td>
<td>5.6</td>
<td>6.1</td>
<td>+14.8%</td>
</tr>
<tr>
<td>64+</td>
<td>1.6</td>
<td>2.1</td>
<td>2.6</td>
<td>+64.5%</td>
</tr>
</tbody>
</table>

Source: NC Office of Management and Budget, 2017
https://www.osbm.nc.gov/demog/countytotals_standardagegroups
Strategic Plan
 Desired Outcomes

• Convenient, affordable and accessible statewide public transportation network
• Phased plan – both incremental and long range
• Strengthened state, regional and local partnerships
• Sustainable funding
• High-functioning network that leads to increased transit ridership
### Your Vision for Public Transportation in North Carolina

<table>
<thead>
<tr>
<th>Category</th>
<th># Responses</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Extent of Transit System</td>
<td>37</td>
<td>No-borders, Ubiquitous, Regional, Rural, Growing</td>
</tr>
<tr>
<td>Service Characteristic</td>
<td>37</td>
<td>Frequent, Multi-modal, Fast, Innovative</td>
</tr>
<tr>
<td>Connected / Opportunity</td>
<td>28</td>
<td>Connected, Seamless, Coordinated, Options</td>
</tr>
<tr>
<td>Customer Experience</td>
<td>28</td>
<td>Easy, Convenient, Useful, Liberating</td>
</tr>
<tr>
<td>Accessible / Inclusive</td>
<td>23</td>
<td>Accessible, Inclusive, Critical, Lifeline</td>
</tr>
<tr>
<td>System Characteristic</td>
<td>21</td>
<td>Effective, Efficient, Successful</td>
</tr>
<tr>
<td>Service Specific</td>
<td>18</td>
<td>Light rail, High-Speed Rail, Commuter-Rail, Greenways</td>
</tr>
<tr>
<td>Fares and Affordability</td>
<td>9</td>
<td>Affordable, Single pay, Free</td>
</tr>
<tr>
<td>Total Responses</td>
<td>206</td>
<td></td>
</tr>
</tbody>
</table>

May 2017 Community Meetings – 301 attendees
Greatest Challenge
Facing Public Transportation in North Carolina

Percent of Responses

- Local funding: 34%
- State funding: 20%
- Political boundaries: 17%
- Interagency cooperation: 10%
- Federal funding: 9%
- Buses and facilities (capital): 6%
- Compliance with federal regulations: 2%
- Management capacity: 1%

May 2017 Community Meetings – 301 attendees
Transit Markets Analysis

- 15 analysis districts for commuting patterns and opportunity analysis
Travel Market Observations

• There is a strong market for local transit services, especially in the larger urban areas
• Travel patterns are regional for work, education and services
• Longer distance regional commuting markets exist in many regions
• Access to healthcare and community colleges requires longer distance trips
• Service area boundaries create barriers to opportunities
• There are emerging markets where new local bus services may be warranted
Draft Vision and Missions

Vision: *Connecting North Carolinians to Opportunities*

Missions:

- Deliver a seamless frequent transit network that provides North Carolinians convenient access to employment, education, healthcare and recreation
- Improve the State’s Quality of Life by:
  - Supporting economic development
  - Promoting healthy choices
  - Enabling independent living
  - Providing equality of access
- Increase Peak Period Capacity for Major Corridors
Join us in Community Outreach

MetroQuest Online Survey

Are you in the transit picture?

- October 2017 Community Meetings
- March 2018 Strategic Plan Summit

Gloristine Brown, Mayor
Town of Bethel, NC

https://www.ncdot.gov/nctransit/strategicplan/
<table>
<thead>
<tr>
<th>Round 2 - Community Meetings</th>
<th>Date</th>
<th>Location</th>
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<tbody>
<tr>
<td>Northeastern (12:30 p.m. to 3:30 p.m.)</td>
<td>10/2/17</td>
<td>Pitt County Agricultural Extension Auditorium 403 Government Circle, Suite 2 Greenville, NC 27834</td>
</tr>
<tr>
<td>Southeastern (12:30 p.m. to 3:30 p.m.)</td>
<td>10/4/17</td>
<td>Bladen Community College Auditorium 7418 Highway 41 West, Dublin, NC</td>
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<tr>
<td>Technology (9:30 a.m. to 11:30 a.m.)</td>
<td>10/5/17</td>
<td>Research Triangle Foundation Meeting Rooms A&amp;B 12 Davis Drive Durham, NC 27709</td>
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<tr>
<td>Triangle (12:30 p.m. to 3:30 p.m.)</td>
<td>10/5/17</td>
<td>Research Triangle Foundation Meeting Rooms A&amp;B 12 Davis Drive Durham, NC 27709</td>
</tr>
<tr>
<td>Charlotte / Gastonia / Kannapolis (12:30 p.m. to 3:30 p.m.)</td>
<td>10/16/17</td>
<td>Rowan-Cabarrus Community College - South Campus Building 1000 (Main Building) Rm 106 (Comm. Rm) 1531 Trinity Church Road Concord, NC 28027</td>
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<tr>
<td>Mountain North (12:30 p.m. to 3:30 p.m.)</td>
<td>10/17/17</td>
<td>Blue Ridge Energy 2491 US Hwy 421 South Boone, NC 28607</td>
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<tr>
<td>Land Use (9:30 a.m. to 11:30 a.m.)</td>
<td>10/18/17</td>
<td>Piedmont Authority for Regional Transportation (PART) Board Room 107 Arrow Road Greensboro, NC 27409</td>
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<tr>
<td>Piedmont (12:30 p.m. to 3:30 p.m.)</td>
<td>10/18/17</td>
<td>Piedmont Authority for Regional Transportation (PART) Board Room 107 Arrow Road Greensboro, NC 27409</td>
</tr>
<tr>
<td>Mountain South (12:30 p.m. to 3:30 p.m.)</td>
<td>10/19/17</td>
<td>Asheville-Buncombe Tech Community College Conference Center, Room B 340 Victoria Road Asheville, NC 28801</td>
</tr>
</tbody>
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Local Board Comments

• Why is transit important to your community?

• How can we build stronger and more effective partnerships?

• What programs or initiatives should be included in the Strategic Plan?